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| Mobile App User Guide  Concur Expense  **Last Revised: March 27, 2024** | | This guide describes the current version, which is shown on the "[Introduction](https://www.concurtraining.com/customers/tech_pubs/MobileDocs/_MOBdoc_CCC.htm)" guide. | Applies to these mobile devices:  No: iPhone  No: iPad  Yes: Android |
| **IMPORTANT:** Be aware that your company's configuration may not allow for all of the features described here. Generally, if a feature is not available in your configuration of the web version of SAP Concur, then it is not available in the mobile app. | | | |
| Concur Expense simplifies creating expense reports. For example, creating expense reports is simplified when charges from credit cards, select suppliers, and receipt photos pre-populate in Concur Expense.  Concur Expense provides the following services:   * Automatically categorizes and maps expenses based on receipt. * Streamlines expense management. * Enforces policy compliance. * Reimburses employees faster.   P18C5T1#yIS1 | [Concur Expense 3](#_Toc139380570)  [Expense List (Expenses Screen) 3](#_Toc139380571)  [Expense Report Lists 4](#_Toc139380572)  [Create a Mobile Expense 5](#_Toc139380573)  [Add Receipt Functionality 6](#_Toc139380574)  [Delete an Expense from the Expenses Screen 7](#_Toc139380575)  [Using Delegate Function to Add and Delete Expenses 7](#_Toc139380576)  [Using Delegate Function to Edit Expenses 10](#_Toc139380577)  [Using Delegate Function to Move Expenses 12](#_Toc139380578)  [Create a New Expense Report 14](#_Toc139380579)  [Move Expenses from the Expenses Screen to an Expense Report 15](#_Toc139380580)  [Manage Multiple Items on the Expenses Screen 16](#_Toc139380581)  [Create an Expense Within an Open Expense Report 17](#_Toc139380582)  [Edit an Expense on an Expense Report 19](#_Toc139380583)  [Sort Expenses in an Expense Report 20](#_Toc139380584)  [Filter Expenses in an Expense Report 21](#_Toc139380585)  [Add a Car Mileage (or Km) Expense 23](#_Toc139380586)  [Add a Car Mileage (or Km) Expense – Mileage Calculator 24](#_Toc139380587)  [Make Adjustments 26](#_Toc139380588)  [Reimbursement Rates 29](#_Toc139380589)  [Add/Edit/Delete Itemizations 29](#_Toc139380590)  [Add/Edit/Delete Attendees 31](#_Toc139380591)  [View/Add/Edit/Delete Allocations 33](#_Toc139380592)  [View Report-Level Allocations 33](#_Toc139380593)  [View Expense-Level Allocations 34](#_Toc139380594)  [View Itemization-Level Allocations 35](#_Toc139380595)  [Add/Edit/Delete Expense-Level Allocations 36](#_Toc139380596)  [Add Itemization-Level Allocations 38](#_Toc139380597)  [Icon 39](#_Toc139380598)  [Remove an Expense From an Expense Report 40](#_Toc139380599)  [Edit Report Header Information 40](#_Toc139380600)  [Submit an Expense Report 41](#_Toc139380601)  [Submit an Expense Report With the Approval Flow Screen 42](#_Toc139380602)  [Recall an Expense Report 45](#_Toc139380603)  [Delete an Expense Report 46](#_Toc139380604)  [Copy an Unsubmitted Expense Report 46](#_Toc139380605)  [Access the Taxation Summary Screen 47](#_Toc139380606)  [Work with Fixed Travel Allowances with Fiori UI 49](#_Toc139380607)  [Fixed vs Reimbursable Travel Allowances 49](#_Toc139380608)  [Restrictions 49](#_Toc139380609)  [Create and Edit Fixed Travel Allowances 50](#_Toc139380610)  [Edit a Fixed Travel Allowance Itinerary 62](#_Toc139380611)  [Resolve an Alert in a New Travel Allowance 63](#_Toc139380612)  [Delete Travel Allowances 64](#_Toc139380613)  [Expense Approvals 69](#_Toc139380614)  [Approve an Expense Report 69](#_Toc139380615)  [Send Back an Expense Report 70](#_Toc139380616)  [Review and Approve an Expense Report as a Cost Object Approver 70](#_Toc139380617)  [Review and Approve an Expense Report with a Travel Allowance 71](#_Toc139380618) | | |

**Please Note:**

* TheSAP Concur app for iOS and Android supports universal links, i.e. links that navigate directly to the app if it is installed or to the website if not.
* Such links are included in notification emails from SAP Concur related to the expense report changes.
* Universal link support for customers own use is currently not supported.
* Some security solutions may block the links embedded into email from opening the app directly. The proper exceptions for the security policy should be configured for SAP Concur universal link URLs (pattern to match: https://\*.concursolutions.com/\*). Known cases are:
* MDM/MAM policy that prescribes to open any link tapped in Outlook mobile app only in specified browser.
* Outlook mail server phishing protection that wraps all link embedded into e-mails to open the safety check service first.

## Concur Expense

### Expense List (Expenses Screen)

| Screen(s) | Description/Action |
| --- | --- |
| P82C3T2#yIS1 | On the home screen, tap **Expense** to access your list of expenses. Use the **Expense** screen to:   * Add, view, edit, and delete *mobile* expenses. Mobile expenses are designed to be quick and easy. * To make more extensive features like itemizations and attendees, either: * Add the *mobile*expense to an expense report and then edit. * Create the expense on an open expense report and then edit. * For car mileage/kilometers expenses, tap **Expenses** on the home screen. An option will appear **Create a Mileage Expense**. * View and make minimal edits to card transactions, which appear with the P89C4T2#yIS1 icon. * To make more extensive edits, add the card transaction to an expense report then edit. * To *delete* a card transaction, use the web version of Expense, if your company allows you to delete card transactions. * View e-receipts, which can be edited once attached to a report. * Attach expenses – *mobile* expenses, e-receipts, and card transactions – to a new or existing expense report. |

### Expense Report Lists

| Screen(s) | Description/Action |
| --- | --- |
| P99C3T3#yIS1 P99C3T3#yIS2 | On the home screen, tap **Expense** to access the list of expenses and toggle to **Reports**. On the **Reports** screen, you can view up to 100 expense reports in each of the **Reports** main screen or **History** tabs. On the **Reports** screen, you can:   * View unsubmitted, submitted, and returned reports * Create a new report * Copy reports * Delete unsubmitted reports * View red **Alert** and yellow **Warning** signs on reports flagged for exceptions * View the name, status, date and amount of each report   **NOTE:** All active reports are separated into **Unsubmitted**, **Submitted**, and **Other** sections. Within each category, the reports are sorted by report date. |
| P109C5T3#yIS1 | You can open an existing expense report and:   * View and edit the report summary (report header) * View and attach receipt images * View, add, import, match, edit (add attendees and itemizations), and remove expenses * Submit your report   To access the **Reports History** tab, tap the P115C6T3#yIS1 icon at the top right hand corner:   * View reports that have been approved and sent for payment * View red **Alert** and yellow **Warning** signs on reports flagged for exceptions * Copy reports |

### Create a Mobile Expense

| Screen(s) | Description/Action |
| --- | --- |
| P124C3T4#yIS1 P124C3T4#yIS2 | To create a *mobile* expense:   * On the home screen, tap   **Expense**. * On the **Expenses** screen, toggle to **Expenses** and tap the P127C4T4#yIS1 icon. |
| P129C5T4#yIS1 P129C5T4#yIS2 | 1) On the **Expense** screen, fill in the fields and make the desired selections.  2) Tap **Add Receipt** to take a picture of the receipt, if required.  3) Tap **Save** (upper-right corner) to save.  **NOTE:** You cannot create a **Japan Public Transportation** expense outside of an expense report. |

### Add Receipt Functionality

| Screen(s) | Description/Action |
| --- | --- |
| P139C3T5#yIS1 P139C3T5#yIS2 | To create a *mobile* expense:   * On the home screen, tap   **Expense**. * On the **Expenses** screen, toggle to **Expenses** and tap the P142C4T5#yIS1 icon. |
| P144C5T5#yIS1 | Tapping the plus icon, displays the types of expenses.  Tapping **Add Receipt** displays the following:   * **Take Photo** opens the camera to take a photo of a receipt directly. * **Upload Pholo** opens the photo gallery on your device to upload a photo of a saved receipt. * **Upload File** allows you to select a file on the mobile device. |

### Delete an Expense from the Expenses Screen

| Screen(s) | Description/Action |
| --- | --- |
| P156C3T6#yIS1 | To delete a *mobile* expense from the **Expenses** screen, you can:   * Long press the desired expense *-or-* * Swipe the desired expense to the left   **NOTE:** You can also delete a *mobile* expense in the web version of SAP Concur.  To delete a mobile expense by long pressing the desired expense:  1) On the **Expenses** screen, *long press* the desired expense (or multiple expenses). The ***P162C4T6#yIS1*** icon appears.  2) Tap ***P163C4T6#yIS1*** to delete the expense.  **NOTE:** To delete a *card* transaction, use the web version of Expense - if your company allows you to delete card transactions. |
| P166C5T6#yIS1 | To delete a *mobile* expense by swiping the desired expense to the left:  1) On the **Expenses** screen, swipethe desired expense (or multiple expenses) to the left.  2) Tap **Delete**.  **NOTE:** To delete a *card* transaction, use the web version of Expense - if your company allows you to delete card transactions. |

### Using Delegate Function to Add and Delete Expenses

1. GRDC users with ExpenseIt, can still act on behalf of another user in ExpenseIt, but will not be able to create, edit or delete manual expenses.

| Screen(s) | Description/Action |
| --- | --- |
| P178C3T7#yIS1 | To Create an Expense While Using the Delegate Function:  1) Tap the **Menu** button and then tap **Act as Another User.** Once the user you wish to act on behalf of is selected, it will be indicated by a green banner. You will also be directed to the **Expenses** Screen. |
| P182C5T7#yIS1 | 2) Tap the **Add** button and the **ExpenseIt** option will appear. Tap this option and you will be able to select the receipt to be added as an expense. Once selected, you will be redirected to the Receipt to confirm it. It will then appear in your **Expenses** List. |
| P185C7T7#yIS1 | 3) To Delete an Expense, swipe on the Expense you want to Delete from the list. Tap the **Trash Can** icon to delete. |

### Using Delegate Function to Edit Expenses

| Screen(s) | Description/Action |
| --- | --- |
| P192C3T8#yIS1 | To Edit an Expense While Using the Delegate Function:  1) Tap the **Menu** button and then tap **Act as Another User.** Once the user you wish to act on behalf of is selected, it will be indicated by a green banner. You will also be directed to the **Expenses** Screen. |
| P196C5T8#yIS1 | 2) Once on the **Expenses** page, select the Expense that needs to be edited and this will direct you to the details of this expense. Tap on the areas that need to be edited. Once the edits are made, tap **Use**for the edits to be reflected. |

### Using Delegate Function to Move Expenses

| Screen(s) | Description/Action |
| --- | --- |
| P203C3T9#yIS1 | To Edit an Expense While Using the Delegate Function:  1) Tap the **Menu** button and then tap **Act as Another User.** Once the user you wish to act on behalf of is selected, it will be indicated by a green banner. You will also be directed to the **Expenses** Screen. |
| P207C5T9#yIS1 | 2) Once on the **Expenses** page, select the Expense that needs to be moved and then select **Move To Report**.  **NOTE:** Delegates can view and move eReceipts but cannot edit them. |

### Create a New Expense Report

You can create a new report:

* From the **Reports** screen (shown here)
* While adding expenses from the **Expenses** tab (described on the following pages)
* While creating a car mileage expense (described on the following pages)

| Screen(s) | Description/Action |
| --- | --- |
| P219C3T10#yIS1 P219C3T10#yIS2 | You can create a new report:   * From the home screen tap **Expense**,you will be redirected to the **Expense** page. From there, you can toggle to **Reports**. * While adding expenses from the **Expenses** screen (described on the following pages)   To create a new report:  1) On the home screen, tap **Expense**. On the **Expense** screen, tap **Reports.**  2) On the **Reports** screen, tap P225C4T10#yIS1 and select **Create New Report**. |
| P227C5T10#yIS1 P227C5T10#yIS2 | 3) On the **New Report** screen:   * SAP Concur provides a report name. * Change it if desired. * Fill in the fields and make the desired selections. * Tap **Create**.   4) On the report screen, enter your expenses, attach receipts, etc. (described on the following pages). |

### Move Expenses from the Expenses Screen to an Expense Report

| Screen(s) | Description/Action |
| --- | --- |
| P239C3T11#yIS1 P239C3T11#yIS2 | To move expenses to a new expense report or an existing expense report, you can:   * Long press the desired expense *-or-* * Swipe the desired expense to the left   To move an expense by long pressing:  1) On the **Expenses** screen, *long press* the desired expense, or multiple expenses.  2) Tap P245C4T11#yIS1 (upper-right corner) to add an expense to an expense report.  3) On the **Move to…** screen, tap the desired expense report. - *or* - Tap ***P246C4T11#yIS1*** to manually create a new expense report. |
| P248C5T11#yIS1 P248C5T11#yIS2 | To move an expense by swiping:  1) On the **Expenses** screen, swipe the desired expense to the left.  2) Tapthe folder icon.  3) On the **Move to…** screen, tap the desired expense report. |
| P255C7T11#yIS1 | 4) An alert will appear at the bottom of the screen **Moving to Report** and you will be redirected to the **Expenses** screen.  - *or* - Tap ***P257C8T11#yIS1*** to manually create a new expense report. |

### Manage Multiple Items on the Expenses Screen

You can delete multiple expenses or move them to an expense report on the **Expenses** screen.

| Screen(s) | Description/Action |
| --- | --- |
| P264C3T12#yIS1 P264C3T12#yIS2 | To manage multiple expenses or move them to an expense report:  1) On the **Expenses** screen, *long press* a desired item to activate multi-selection mode.  2) To add additional items to the selection, single-tap them.  3) To remove items from the selection, single-tap them.  **NOTE**: You can select all expenses by tapping P269C4T12#yIS1 and then tapping **Select All**. |
| P271C5T12#yIS1 | 4) After selecting the desired items, you can:   * Tap P273C6T12#yIS1 to delete the selected itemes. * Tap P274C6T12#yIS1 to add the selected items to a report. |

### Create an Expense Within an Open Expense Report

| Screen(s) | Description/Action |
| --- | --- |
| P280C3T13#yIS1 P280C3T13#yIS2 | To create an expense within an open expense report:  1) On the home screen, tap **Expense**.  2) On the **Expense** screen, toggle to **Reports** and open the desired report. |
| P285C5T13#yIS1 P285C5T13#yIS2 | 3) On the report screen, tap the **Expenses** tab.  4) On the **Expenses** tab, tap P287C6T13#yIS1 to create a new expense.  5) On the next screen, tap **New Expense**. |
| P290C7T13#yIS1 | 6) On the **New** **Expense** screen:   * Choose the desired expense type. * Fill in the fields and make the desired selections. * Tap **Save** (upper-right corner).   **NOTE:** The new report entry experience will not appear, if:   * You add the **Personal Car Mileage**, **Company Car Mileage**, or the **Japan Public Transport** expense types. * You open expenses created via itineraries. * You are geographically located in China. * You are under a restrictive Mobile Device Management (MDM) or Virtual Private Network (VPN). |

### Edit an Expense on an Expense Report

If an expense is attached to an ***unsubmitted*** expense report, you can edit almost every field.

| Screen(s) | Description/Action |
| --- | --- |
| P307C3T14#yIS1 P307C3T14#yIS2 | To edit an expense in an expense report:  1) On the **Reports** screen, tap to open the desired report.  2) On the report screen, tap the **Expenses** tab. |
| P312C5T14#yIS1 | 3) On the **Expenses** tab, tap to open the desired expense.  4) On the **Expense** screen:   * Make the desired changes. * Tap P316C6T14#yIS1 (upper-right corner), to view the more options menu. * On the menu, you can tap on the following options: * **Itemize** * **Add Attendee** * **Allocate** * **Add Receipt** * **Delete Expense** |
| P324C7T14#yIS1 | * Tap **Save** (upper-right corner) to save. |

### Sort Expenses in an Expense Report

| Screen(s) | Description/Action |
| --- | --- |
| P331C3T15#yIS1 P331C3T15#yIS2 | To sort expenses in an expense report:  1) With the report, tap P333C4T15#yIS1 (right-upper corner).  2) On the menu, tap **Sort by**. |
| P336C5T15#yIS1 P336C5T15#yIS2 | 3) On the next menu, tap the desired category to sort the expenses by (in this example, the expenses are sorted by date).  The expenses - now sorted by date – appear on the **Expense** tab on the expense report screen. |

### Filter Expenses in an Expense Report

| Screen(s) | Description/Action |
| --- | --- |
| P344C3T16#yIS1 P344C3T16#yIS2 | To filter expenses in an expense report:  1) With the report, tap P346C4T16#yIS1 (right-upper corner).  2) On the menu, tap **Filter by**. |
| P349C5T16#yIS1 P349C5T16#yIS2 | **3)** On the **Filter** screen, you can choose to filter the expenses by enabling the following categories:   * Alerts * Allocations * Itemizations or * Receipts   Swipe the desired filter toggle to the right to enable it (in this example, the **Receipts** filter is enabled).  4) On the **Filter** screen, tap ***P356C6T16#yIS1*** (upper-left corner) to return to the expense report screen.  **NOTE:** You can tap **Reset** (upper -right corner), to disable *all* the filters. |
| P359C7T16#yIS1 P359C7T16#yIS2 | A message appears on the **Expenses** tab, indicating that the expenses list is now sorted by the previously enabled category.  5) On the expense report screen, tap P361C8T16#yIS1 to view the expenses list on the **Expenses** tab on the expense report screen.  The expenses - filtered by receipts - appear on the **Expenses** tab on the expense report screen. |

### Add a Car Mileage (or Km) Expense

| Screen(s) | Description/Action |
| --- | --- |
| P368C3T17#yIS1 P368C3T17#yIS2 | To add a car mileage (or kilometer) expense:  1) On the home screen, tap **Expense**. Once on the **Expense** screen, toggle to **Reports**.  2) On the **Reports** screen either select   * Tap P372C4T17#yIS1 to **Create New Report**. Then, complete the steps to create the new report.  – *or* – * Add to an existing report by tapping the report. |
| P375C5T17#yIS1 | 3) On the **Expenses** screen, tap P376C6T17#yIS1 and then select **Create a Mileage Expense.** Then:   * Fill in the fields and make the desired selections. **NOTE:** SAP Concur calculates the amount based on the distance and the company's mileage rate. |

### Add a Car Mileage (or Km) Expense – Mileage Calculator

The Mileage Calculator can be used for both personal and company car mileage. The example below shows personal mileage, using the **Drive** on the home screen. For company car mileage, the user creates an expense as usual and selects the *Company Car Mileage* (or something similar) expense type. After that, both types work the same way – as shown below.

| Screen(s) | Description/Action |
| --- | --- |
| P385C3T18#yIS1 P385C3T18#yIS2 | 1) On the home screen, tap **Expense**. Once on the **Expense** screen, toggle to **Reports**.  2) On the **Reports** screen either select   * Tap P388C4T18#yIS1 to **Create New Report**. Then, complete the steps to create the new report.  – *or* – * Add to an existing report by tapping the report. |
| P391C5T18#yIS1 | 3) On the **Mileage Expense** screen, tap **Distance Calculator**.  4) On the **Distance Calculator** screen, in the **Start Location** field, start typing the initial location. |
| P395C7T18#yIS1 | 5) Select from the list of locations. The selected location appears on the map. |
| P398C9T18#yIS1 | 6) On the **Distance Calculator** screen, in the **Add Destination** field, start typing the ending location.  7) Select from the list of locations. The selected location appears on the map along with the mileage (lower-right corner). |
| P402C11T18#yIS1 P402C11T18#yIS2 | 8) On the **Distance Calculator** screen, you have several additional options:   * Tap **Add Destination** to add another destination. * Tap **Options** (upper-right corner) to choose to avoid tolls or highways. * If an alternate route is available (shown as a gray line), you can select that route.   9) When done, tap **Use Route**. The mileage and the reimbursement amount appear on the **Mileage Expense** screen. |

#### Make Adjustments

| Screen(s) | Description/Action |
| --- | --- |
| P413C3T19#yIS1 P413C3T19#yIS2 | To make additional adjustments:  1)On the **Expense** screen, tap **Route Details**.  2) On the **Route Details** screen, tap P416C4T19#yIS1 (upper-right corner) to access the menu. Using the menu, you can:   * Edit any portion of the trip – *or* – * Designate part of the trip as personal |
| P420C5T19#yIS1 P420C5T19#yIS2 | To edit a route:  1) On the menu of the **Route Details** screen, tap P422C6T19#yIS1 (upper-right corner).  2) Tap **Edit Route**.  3) On the **Distance Calculator** screen, make the desired changes, using the same steps as when you created the route. |
| P426C7T19#yIS1 P426C7T19#yIS2 | To designate part of the trip as personal:  1) On the menu of the **Route Details** screen, tap P428C8T19#yIS1 (upper-right corner).  2) Tap **Set Segment as Personal**.  3) On the **Set Personal** screen, select the segment that is personal and then tap P430C8T19#yIS1 (upper-right corner).  4) On the **Route Details** screen, the personal and business distance amounts appear at the bottom of the screen. |
| P433C9T19#yIS1 P433C9T19#yIS2 | To deduct commute mileage:  1) On the **Route Details** screen, tap **Deduct Commute Distance**.  2) On the **Distance Calculator** screen, define the starting and ending points using the map.  3) Select whether the commute is one way or round trip.  4) When done, tap **Use Route**. The **Route Details** screen appears. |
| P440C11T19#yIS1 P440C11T19#yIS2 | 5) On the **Route Details** screen, tap P441C12T19#yIS1 (upper-left corner) to return to the **Mileage Expense** screen, where the adjusted distance and amount appear.  6) Tap **Save** (upper-right corner). The expense is saved to the expense report. |

#### Reimbursement Rates

| Screen(s) | Description/Action |
| --- | --- |
| P448C3T20#yIS1 P448C3T20#yIS2 | To add reimbursement rates:  1)On the **Expense** screen, tap **Route Details**.  2) On the **Route Details** screen, tap P451C4T20#yIS1 (upper-right corner) to access the menu. Using the menu, you can:   * Edit any portion of the trip – *or* – * Designate part of the trip as personal |

### Add/Edit/Delete Itemizations

After an expense has been added to a report, you can itemize the expense.

| Screen(s) | Description/Action |
| --- | --- |
| P460C3T21#yIS1 | To itemize an expense:  1) On the report screen, tap the **Expenses** tab.  2) On the **Expenses** tab, tap to open the desired expense.  3) On the **Expense** screen, tap P464C4T21#yIS1 (right-upper corner) and select **Itemize**. |
| P466C5T21#yIS1 P466C5T21#yIS2 | 4) On the **Itemization** screen, enter the itemizations.  If there is a remaining balance, select the expense again and tap P468C6T21#yIS1 (lower-right corner) and repeat these steps (including **Save**) until the remaining amount balance is zero. |
| P470C7T21#yIS1 P470C7T21#yIS2 | To ***edit*** an itemization:  Tap the desired itemization and then make the desired changes.  To ***remove*** an itemization:  Long-press the desired itemization and then tap P474C8T21#yIS1 (upper-right corner).  The remaining amount appears at the bottom of the Itemizations screen. |

### Add/Edit/Delete Attendees

After an expense has been added to a report, you can add attendees to the expense.

| Screen(s) | Description/Action |
| --- | --- |
| P482C3T22#yIS1 P482C3T22#yIS2 | To add, edit, or delete attendees:  1) On the report screen, tap the **Expenses** tab.  2) On the **Expenses** tab, tap to open the desired expense.  3) On the **Expense** screen, tap **View** **Attendees**.  4) On the **Attendees** screen, tap ***P487C4T22#yIS1*** (upper-right corner) to add an attendee. |
| P489C5T22#yIS1 P489C5T22#yIS2 | 5) On the **Add Attendee Options** menu, tap one of the following:   * **Search** **>** **Favorites** to search your Favorite Attendees |
| P493C7T22#yIS1 *P493C7T22#yIS2* | * **Search** **>** **Advanced** to search your company's list of attendeesor from an external source (like Salesforce) * **New from Contact** to select from your smartphone contact list |
| P497C9T22#yIS1 | To ***edit*** an attendee:  Tap the desired attendee name and then make the desired changes.  To ***delete*** an attendee:  Long-press the desired attendee name and then tap **Remove**. |
| P503C11T22#yIS1 | To add attendees to **personal** expenses:  1) Create expense.  2) Complete expense.  3) Add attendees.  4) Add itemization:   * Set the amount of the itemization to the total amount of the expense. * Set the itemization as a personal expense. * Save the itemization.   5) Save the expense. |

### View/Add/Edit/Delete Allocations

You can view report-level allocations, expense-level allocations, and itemization-level allocations.

#### View Report-Level Allocations

The **Allocation Summary** screen shows that the expense is allocated to the Marketing cost center with a total of $115.00.

| Screen(s) | Description/Action |
| --- | --- |
| P521C3T23#yIS1 P521C3T23#yIS2 | To view report-level allocations:  1) On the report screen, tap **Details**.  2) On the **Details** tab, tap **Allocation Summary**.  3) On the **Allocation Summary** screen:   * Review the information. * Tap P527C4T23#yIS1 (upper-left corner) to return to the report. |

#### View Expense-Level Allocations

| Screen(s) | Description/Action |
| --- | --- |
| P533C3T24#yIS1 P533C3T24#yIS2 | To view expense-level allocations:  1) On the report screen, tap the **Expenses** tab.  2) On the **Expenses** tab, tap the desired expense.  3) On the **Expense** screen, tap P537C4T24#yIS1 (upper-right corner).  4) On the menu, tap **Allocate**. |
| P540C5T24#yIS1 P540C5T24#yIS2 | 5) On the **Allocations** screen, tap the desired allocation.  6) On the **Allocations** screen:   * Review the information. * Tap P544C6T24#yIS1 (upper-left corner) to return to the report. |

#### View Itemization-Level Allocations

| Screen(s) | Description/Action |
| --- | --- |
| P550C3T25#yIS1 P550C3T25#yIS2 | To view itemization-level allocations:  1) On the **Report** screen, tap the **Expenses** tab.  2) On the **Expenses** tab, tap the desired expense.  3) On the **Expense** screen, tap **View** **Itemizations**. |
| P556C5T25#yIS1 | 4) On the **Itemizations** screen, tap the desired itemization. |

#### Add/Edit/Delete Expense-Level Allocations

| Screen(s) | Description/Action |
| --- | --- |
| P563C3T26#yIS1 P563C3T26#yIS2 | To add, edit, or delete expense-level allocations:  1) To ***add*** allocations, on the **Expense** screen:   * Tap P566C4T26#yIS1 (upper-right corner). * Tap **Allocate**. * On the **Allocations** screen, tap P568C4T26#yIS1 (lower-right corner). |
| P570C5T26#yIS1 P570C5T26#yIS2 | 2) On the **Add Allocation** screen, you can:   * Fill in the desired percentage. * Tap **Save**. * Fill in the fields (if any) and make the desired selections. * Tap **Save**. |
| P577C7T26#yIS1 P577C7T26#yIS2 | 3) To ***edit*** an allocation, on the **Allocations** screen, tap the desired allocation to open it and then make the desired changes and then tap **Save**.  4) To ***delete*** an allocation, on the **Allocations** screen, tap P579C8T26#yIS1 (upper-right corner).   * Tap the desired selection circles. |
| P582C9T26#yIS1 | * Tap P583C10T26#yIS1 (upper-right corner) to delete the selected allocations from an expense. |

#### Add Itemization-Level Allocations

| Screen(s) | Description/Action |
| --- | --- |
| P589C3T27#yIS1 | To ***add*** allocations, on the **Itemization** screen:  1) On the **Itemization** screen, tap **View** **Allocations**.  2) On the **Allocations** screen, tap P592C4T27#yIS1 (lower-right corner). |
| P594C5T27#yIS1 P594C5T27#yIS2 | 3) On the **Add** **Allocation** screen,   * Fill in the desired percentage. * Tap **Done**. * Fill in the fields (if any) and make the desired selections. * Tap **Save** (upper-right corner). |
| P601C7T27#yIS1 | 4) On the **Allocations** screen, tap P602C8T27#yIS1 (lower-right corner) to add additional allocations.  5) To ***edit*** an allocation, on the **Allocations** screen:   * Tap the desired allocation to open it. * Make the desired changes. * Tap **Save**. |

#### Icon

| Screen(s) | Description/Action |
| --- | --- |
| P612C3T28#yIS1 | Once items are allocated, an Allocation icon appears next to the expense and at the report level. |

### Remove an Expense From an Expense Report

You can remove an expense from an expense report, if the report has not been submitted.

| Screen(s) | Description/Action |
| --- | --- |
| P621C3T29#yIS1 | To remove an expense from an **unsubmitted** expense report by swiping:  1) Swipe the desired expense to the left.  2) Tap **Delete**.  **NOTE:** If you delete a *mobile* expense or an expense created from a card transaction, it is not really deleted; it is moved back to the "pool" of expenses on the **Expenses** screen.  If you delete any other type of expense from an expense report, it is truly deleted. (This is consistent with the web version of Expense.) |

### Edit Report Header Information

You can edit the report name, date, and other company-defined fields on an ***unsubmitted*** report.

| Screen(s) | Description/Action |
| --- | --- |
| P632C3T30#yIS1 P632C3T30#yIS2 | To edit report header information:  1) On the report screen, tap **Details**.  2) On the **Details** tab, tap the appropriate field to make the desired changes. |
| P637C5T30#yIS1 | 3) Tap **Save** (upper-right corner). |

### Submit an Expense Report

| Screen(s) | Description/Action |
| --- | --- |
| P645C3T31#yIS1 | To submit an expense report:  On the report screen, tap **Submit**. |

### Submit an Expense Report With the Approval Flow Screen

| Screen(s) | Description/Action |
| --- | --- |
| P653C3T32#yIS1 P653C3T32#yIS2 | To submit an expense report with the **Approval Flow** screen:  1) With the report open, tap **Submit**.  The **Approval Flow** screen appears.  **NOTE:** Your company will need to set the necessary configurations for the **Approval Flow** screen to appear and to allow you to modify the approval flow.  2) On the **Approval Flow** screen, tap P656C4T32#yIS1 (lower-right corner) to add an approval step.  **NOTE:** When you first access the **Approval Flow** screen, a message appears indicating that you can tap P657C4T32#yIS1 (upper-right corner) to select and delete approval steps. |
| P659C5T32#yIS1 P659C5T32#yIS2 | 3) On the approvers search screen, enter search criteria in the search field.  **NOTE:** While entering the search criteria, a list of approvers appears on the approvers search screen.  4) Tap P662C6T32#yIS1 to change the filter.  5) On the **Search by** window, select the desired filter to search approvers by.  **NOTE:** By default, the system searches for approvers via the **Last Name** filter.  6) On the approvers search screen, tap the desired approver. |
| P667C7T32#yIS1 P667C7T32#yIS2 | The selected approver appears as a user added step on the **Approval Flow** screen.  **NOTE:** When you first add a user added step, a message will appear indicating that you can hold and drag a user added approval step to reorder it. |
| P671C9T32#yIS1 | 7) On the **Approval Flow** screen, tap and hold the desired approval step and then drag the step upward or downward to reorder it.  When you tap on an existing approval step, the approvers search screen appears.  The currently selected approver appears at the top of the screen with a checkmark.  **NOTE:** For the **Authorized Approver** steps, all authorized approvers appear by default (without searching), and you can search within those results if desired. |
| P677C11T32#yIS1 P677C11T32#yIS2 | You can delete an approval step on the **Approval Flow** screen. To delete an approval step on the **Approval Flow** screen, you can either:   * Swipe the desired approval step to the left and then tap **Delete** on the **Delete Approver** window to delete it.  *-or-* |
| P681C13T32#yIS1 P681C13T32#yIS2 | * Tap P682C14T32#yIS1 (upper-right corner), tap the desired approval step, and then tap P682C14T32#yIS2 (upper-right corner) to delete it.   8) Once done reviewing and adjusting the approval flow on the **Approval Flow** screen, tap **Submit**. |

### Recall an Expense Report

| Screen(s) | Description/Action |
| --- | --- |
| P689C3T33#yIS1 P689C3T33#yIS2 | To recall a report:  1) On the home screen, tap **Expense** and toggle to **Reports**.  2) On the **Reports** screen, tap the desired submitted report.  3) On the report screen, tap P693C4T33#yIS1 (upper-right corner).  4) On the menu, tap **Recall Report**.  5) On the message screen that appears, select **Confirm**. |
| P697C5T33#yIS1 | 6) A message will appear to confirm the report has been recalled. |

### Delete an Expense Report

| Screen(s) | Description/Action |
| --- | --- |
| P704C3T34#yIS1 | To delete an expense report:  1) On the **Reports** screen, swipe the desired report to the right.  2) Tap **Delete**.  **NOTE:** Expenses on the report that are related to card transactions are not really deleted – they are returned to the "pool" of card transactions. Cash transactions are truly deleted. |

### Copy an Unsubmitted Expense Report

| Screen(s) | Description/Action |
| --- | --- |
| P714C3T35#yIS1 P714C3T35#yIS2 | To copy an unsubmitted expense report:  1) On the **Reports** screen,tap desired report.  2) Tap the P717C4T35#yIS1 icon in the top right corner.  3) Tap **Copy Report**. |
| P720C5T35#yIS1 | 4) Enter the desired report name.  5) Tap **Create**.  The copied expense report appears. |

### Access the Taxation Summary Screen

|  |  |
| --- | --- |
| Screen(s) | Description/Action |
| P729C3T36#yIS1 P729C3T36#yIS2 | To access the **Taxation Summary** screen:  1) From the **Report** screen, on the **Details** tab, tap **Taxation Summary**.  2) On the **Taxation Summary** screen, tap P732C4T36#yIS1 (upper-right corner) to view the sort options. |
| P734C5T36#yIS1 P734C5T36#yIS2 | The **Sort by** window appears with the following options:   * **Date** * **Expense Type**   3) From the **Taxation Summary** screen, on the **Taxability** tab, tap P738C6T36#yIS1 (lower-left corner) to view the taxability amounts. |
| P740C7T36#yIS1 P740C7T36#yIS2 | The **Taxability Amounts** window appears with the total taxability amounts.  4) On the **Taxation Summary** screen, tap the **Deductibility** tab. |
| P744C9T36#yIS1 P744C9T36#yIS2 | 5) On the **Deductibility** tab, tap P745C10T36#yIS1 (lower-left corner) to view the deductibility amounts.  The **Deductibility Amounts** window appears with the total deductibility amounts. |

### Work with Fixed Travel Allowances with Fiori UI

Users can claim their ***fixed*** meals and ***fixed*** lodging travel allowances in the SAP Concur mobile app.

#### Fixed vs Reimbursable Travel Allowances

* ***Fixed*** travel allowances – often referred to as *per diems* – provide a defined daily amount regardless of the actual amount spent by the user.
* ***Reimbursable*** travel allowances generally provide reimbursement for the actual amount of the expense. The ability to create and manage reimbursable travel allowances is not available in the mobile app.

#### Restrictions

For the most part, fixed travel allowances work the same way in the mobile app as on the web version of SAP Concur – with some exceptions. These configuration options are not available in the mobile app:

|  |  |
| --- | --- |
| * Users cannot define/select: * Trip length * "Short distance" * "Extended trips" * "Use Percent Rule" * Location "within municipality" | * Users cannot enter: * Actual meal amounts * Rate location * The mobile version of SAP Concur does not combine meals and lodging rates nor does it display base rates, company rates, government rates, etc. |

If the user's configuration uses any of the options listed above, the user should manage their travel allowances using the web version of SAP Concur.

#### Create and Edit Fixed Travel Allowances

##### Create A New Fixed Travel Allowance in an Expense Report

| Screen(s) | Description/Action |
| --- | --- |
| P772C3T38#yIS1 P772C3T38#yIS2P772C3T38#yIS3 | To create a new fixed travel allowance in an expense report:  1) With a report open:  On the **Details** tab, tap **Claim Travel Allowance.**  *- or -*  On the **Expenses** tab , tap P777C4T38#yIS1 (lower-right corner) and then select **Travel Allowance** from the options that appear. |
| P779C5T38#yIS1 P779C5T38#yIS2 | 3) On the **New Travel Allowance** screen:   * Enter the itinerary name. * Select the **Allowance Category**.  **NOTE:** If you select an allowance category - which supports the border crossing feature - an additional input field will appear in trip segments, where a border crossing situation is detected. * Select the **Trip Type**. * Swipe **Without Overnight** to the right, if there was no overnight stay during the trip. * Swipe **Detailed Itinerary** to the right, to view all itinerary fields. (In this example, the **Detailed Itinerary** option is enabled.)   **NOTE:** Depending on which allowance category you select, you may have the option to choose between the simple or detailed itinerary mode.  If you enable the **Detailed Itinerary** toggle - while in simple mode - your detailed changes will be lost. The system will then replace your information with defaulted values.   If you switch - from the simple mode - back to the detailed mode, you will need to re-enter your details in the additional fields again. * Enter the start and arrival locations.  **NOTE:** When you select an allowance category with the *German 3-month-rule* configuration, the **Arrival Location** fieldwill require the full address to be filled out. Without this configuration enabled, you only need to fill out the destination city field and the full address is not required. |
| P788C7T38#yIS1 P788C7T38#yIS2P788C7T38#yIS3 | * Select the date and then tap **OK** (lower-right corner). * Select the time and then tap **OK** (lower-right corner).  **NOTE:** You can tap P790C8T38#yIS1 to access the **Set time** window. To go back to the default time window, tap P790C8T38#yIS2 (lower-left corner). |
| P792C9T38#yIS1 | * Tap **Add Destination** to access the return trip fields.  **NOTE:** The **Start Location** and **Arrival Location** fields must be filled out before the user can access the **Add destination** option. * Enter the return trip information. * Repeat for each leg of the trip, entering the exact "arrival" address if necessary. * Review the itinerary for accuracy.   4) When done, tap **Save** (upper-right corner). |
| P799C11T38#yIS1 | 5) If adjustments are necessary (for example, to deduct for provided meals), tap the **Adjustments** tab on the **Travel Allowance** screen.  6) Tap the desired daily allowance that requires adjustment. |
| P803C13T38#yIS1 P803C13T38#yIS2P803C13T38#yIS3 | 7) On the  **Adjustments** screen:   * Make the desired adjustments.  **NOTE:** If the web version of SAP Concur provides a list of options instead of Yes/No, then the list appears here as well. * When done, tap **Save** (upper-right corner).   8) On the **Travel Allowance** screen:   * Make any other required adjustments. * Tap P809C14T38#yIS1 (upper-left corner) to return to the expense report.   9) On the report screen:   * Review for accuracy. * From the **Details** tab, tap **Travel Allowance Itineraries & Adjustments** if changes are necessary. * Finish adding expenses, receipts, etc. Submit when ready. |

##### Create a New Fixed Travel Allowance With Multiple Destinations in an Expense Report

| Screen(s) | Description/Action | |
| --- | --- | --- |
| P819C3T39#yIS1 P819C3T39#yIS2P819C3T39#yIS3 | To create a new fixed travel allowance with multiple destinations in an expense report:  1) With a report open,   * On the **Details** tab, tap **Claim Travel Allowance.**   *- or -*   * On the **Expenses** tab, tap P825L9C4T39#yIS1(lower-right corner) and then select **Travel Allowance** from the options that appear.   P826C4T39#yIS1 | |
| P828C5T39#yIS1 | 2) On the **New Travel Allowance** screen.   * Fill in the fields and make the desired selections. * Tap **Add Destination** to create multiple destinations.   3) When done, tap **Save** (upper-right corner). | |
| P835C7T39#yIS1 | The multiple destinations appear on the **Travel Allowance** screen.  **NOTE:** If your company has opted out of the multiple itineraries on one expense report feature, the option to add more itineraries will not appear. |

##### Create a New Fixed Travel Allowance Itinerary Without Overnight in an Expense Report

| Screen(s) | Description/Action |
| --- | --- |
| P843C3T40#yIS1 P843C3T40#yIS2 | To create a new fixed travel allowance itinerary without overnight in an expense report:  1) With a report open,   * On the **Details** tab, tap **Claim Travel Allowance.**   *- or -*   * On the **Expenses** tab, tap P848C4T40#yIS1(lower-right corner) and then select **Travel Allowance** from the options that appear.   2) On the **New Travel Allowance** screen:   * Fill in the fields and make the desired selections. * Swipe the **Without Overnight** toggle to right. * Tap **Save** (upper-right corner).   **NOTE:** Depending on which category is in the **Allowance Category** field, the user can adjust the itinerary details. |
| P855C5T40#yIS1 P855C5T40#yIS2 | The itinerary without overnight appears on the **Travel Allowance** screen.  **NOTE:** With the **Without Overnight** toggle enabled, the first itinerary in the list will display the daily allowances in accordance with the 24-hour rule showing 0.00€ for the second day.  Also, the **Lodging Type** field on the **Daily Allowance** screen will appear again. |

##### Create a New Fixed Travel Allowance With a Border Crossing in an Expense Report

| Screen(s) | Description/Action |
| --- | --- |
| P864C3T41#yIS1 | To create a new fixed travel allowance with a border crossing in an expense report:  1) With a report open,   * On the **Details** tab, tap **Claim Travel Allowance.**   *- or -*   * On the **Expenses** tab, tap P869C4T41#yIS1(lower-right corner) and then select **Travel Allowance** from the options that appear.   2) On the **New Travel Allowance** screen:   * Select an allowance category that supports the border crossing feature. * Fill in the fields and make the desired selections. * Tap **Save** (upper-right corner). |
| P877C5T41#yIS1 | 3) On the **Travel Allowance** screen, tap the **Itinerary** tab. |
| P880C7T41#yIS1 | The border crossing itinerary appears on the on the **Itinerary** tab on the **Travel Allowance** screen.  **NOTE:** This field will not appear - on the **Itinerary** tab – if you have not traveled to another country during your trip. |

##### Select a Different Address in a New Travel Allowance

| Screen(s) | Description/Action |
| --- | --- |
| P888C3T42#yIS1 P888C3T42#yIS2 | To select a different address in a new fixed travel allowance:  1) With a report open,   * On the **Details** tab, tap **Claim Travel Allowance.**   *- or -*   * On the **Expenses** tab, tap P893C4T42#yIS1(lower-right corner) and then select **Travel Allowance** from the options that appear.   2) On the **New Travel Allowance** screen, tap the **Arrival Location** field.  3) On the menu, tap **Select Different Address**. |
| P898C5T42#yIS1 P898C5T42#yIS2 | 4) On the locations screen, tap the desired address.  The new address appears on the **New Travel Allowance** screen. |

#### Edit a Fixed Travel Allowance Itinerary

| Screen(s) | Description/Action |
| --- | --- |
| P906C3T43#yIS1 P906C3T43#yIS2 | To edit a fixed travel allowance:  1) On home screen, tap **Expense** .  2) On the **Expenses** screen, tap the desired expense report.  3) On the expense report screen, tap the **Details** tab.  4) On the **Details** tab, tap **Travel Allowance Itineraries & Adjustments**.  5) On the **Travel Allowance** screen, tap P912C4T43#yIS1 (upper-right corner).  6) On the menu, tap **Edit Itinerary**. |
| P915C5T43#yIS1 | 7) On the **Edit Itinerary** screen:   * Edit the fields * Make the desired selections   8) When done, tap **Save** (upper-right corner).  **NOTE:** Depending on which category is in the **Allowance Category** field, the user can adjust the itinerary details. |

#### Resolve an Alert in a New Travel Allowance

| Screen(s) | Description/Action |
| --- | --- |
| P926C3T44#yIS1 | To resolve an alert in a new fixed travel allowance:  1) On the **New Travel Allowance** screen:   * Fill in the fields and make the desired selections. * Tap **Save** (upper-right corner).   After the system attempts to save the travel allowance and an alert appears at the top of the **New Travel Allowance** screen. |
| P934C5T44#yIS1 P934C5T44#yIS2 | 2) Scroll to the affected field.  **NOTE:** Additionally, a red **alert** text will appear next to the affected field giving you further instructions on how to resolve the issue.  3) Tap the desired field to correct.  4) On the time window, make the desired adjustments and then tap **OK**. |
| P939C7T44#yIS1 | The red **alert** text on the field will no longer appear. If necessary, repeat these steps in the next affected section.  5) When done, tap **Save** (upper-right corner). |

#### Delete Travel Allowances

##### Delete a Travel Allowance From an Expense Report

| Screen(s) | Description/Action |
| --- | --- |
| P949C3T45#yIS1 | To delete a fixed travel allowance from an expense report:  1) With the report open, tap the **Details** tab.  2) On the **Details** tab, tap **Travel Allowance Itineraries & Adjustments**. |
| P954C5T45#yIS1 P954C5T45#yIS2 | 3) On the **Travel Allowance** screen, tapP955C6T45#yIS1 (upper-right corner).  4) Tap **Delete Travel Allowance**. |
| P959C7T45#yIS1 | 5) On the **Confirm Itinerary Deletion** window, tap **Delete**. |
| P962C9T45#yIS1 | On the **Report** screen all travel allowance expenses are gone and the button on the Details tab is called **Claim Travel Allowance** again. |

##### Delete a Travel Allowance with multiple itineraries

| Screen(s) | Description/Action |
| --- | --- |
| P969C3T46#yIS1 P969C3T46#yIS2P969C3T46#yIS3 | To delete a fixed travel allowance with multiple itineraries:  1) With the report open, tap the **Details** tab.  2) On the **Details** tab, tap **Travel Allowance Itineraries & Adjustments**.  3) On the **Travel Allowance** screen, in the **Itineraries** section, swipe the desired itinerary to the left.  **NOTE:** The **Travel Allowance Itineraries** screen only appears when there are multiple itineraries attached to the report. |
| P977C5T46#yIS1 P977C5T46#yIS2 | 7) On the **Delete Travel Allowance** window, tap **Delete**.  The travel allowance no longer appears in the **Itineraries** section of the **Travel Allowance** screen. |

## Expense Approvals

Use **Approvals** on the home screen to view, approve, or send back expense reports (if you are a report approver or a cost object approver).

### Approve an Expense Report

| Screen(s) | Description/Action |
| --- | --- |
| P987C3T47#yIS1 P987C3T47#yIS2 | To approve an expense report:  1) On the home screen, tap **Approvals**.  2) On the **Approvals** screen, tap the desired expense report.  3) On the **Report Approval** screen, tap **Approve**.  4) On the **Report Approval** screen, enter the desired comment.  5) Tap **Approve**. |

### Send Back an Expense Report

| Screen(s) | Description/Action |
| --- | --- |
| P999C3T48#yIS1 P999C3T48#yIS2 | To send back an expense report:  1) On the home screen, tap **Approvals**.  2) On the **Approvals** screen, tap the desired expense report.  3) On the **Report Approval** screen, tap **Send Back**.  4) On the **Sending Back Report** screen, enter the desired comment.  5) Tap **Send Back**. |

### Review and Approve an Expense Report as a Cost Object Approver

| Screen(s) | Description/Action |
| --- | --- |
| P1011C3T49#yIS1 P1011C3T49#yIS2 | To review and approve an expense report as a cost object approver:  1) On the home screen, tap **Approvals**.  2) On the **Approvals** screen, tap the desired expense report.  3) On the **Report Approval** screen, review the report details.  4) When ready to approve the expense report, tap **Approve**. |

### Review and Approve an Expense Report with a Travel Allowance

| Screen(s) | Description/Action |
| --- | --- |
| P1022C3T50#yIS1 P1022C3T50#yIS2 | To review and approve an expense report with a travel allowance:  1) On the home screen, tap **Approvals**.  2) On the **Approvals** screen, tap the desired expense report.3) On the **Report Approval** screen, from the **Expense** tab you can review the daily allowance details.  4) Once done reviewing the daily allowance details, tap the **Details** tab.  On the **Details** tab, you can review the expense report details, comments, and travel allowances.  5) Once done reviewing the expense report details and comments, tap **Travel Allowance Itineraries & Adjustments**. |
| P1030C5T50#yIS1 P1030C5T50#yIS2 | 6) On the **Travel Allowance** screen, you can review the adjustment details.  7) Once done reviewing the adjustment details, tap the **Itineraries** tab.  8) From the **Itineraries** tab, on the **Travel Allowance** screen, review the itineraries details.  9) Once done reviewing the itinerary details, tap P1034C6T50#yIS1 (upper-left corner) to return to the **Report Approval** screen. |
| P1036C7T50#yIS1 | 10) On the **Report Approval** screen, tap **Approve**. |

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