

Concur Invoice: Purchase Request and Purchase Order

User Guide for Standard Edition

Last Revised: September 16, 2023

Applies to these SAP Concur solutions:

- ☐ Concur Expense
 - ☐ Professional/Premium edition
 - ☐ Standard edition
- ☐ Concur Travel
 - ☐ Professional/Premium edition
 - ☐ Standard edition
- ☒ Concur Invoice
 - ☐ Professional/Premium edition
 - ☒ Standard edition
- ☐ Concur Request
 - ☐ Professional/Premium edition
 - ☐ Standard edition

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Revision History

Date	Notes/Comments/Changes
September 16, 2023	Updated the <i>Create a Purchase Request</i> section to include the new Policy field.
August 31, 2022	Minor edits; cover date not updated
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
December 2, 2021	Updated the screenshots and text on pages 105 and 106 to reflect new static suffix for the From line in PO preview.
March 4, 2021	Updated the copyright year; no other changes; cover date not updated
October 21, 2020	Added information about users with the Purchase Request User and Purchase Request Processors roles being able to delete images.
June 12, 2020	Minor edit; no content change.
June 11, 2020	Added information about reopening closed purchase orders.
May 21, 2020	Added note that states that users who do not have access to the Distribution functionality will not see it.
January 8, 2020	Updated the copyright; no other changes; cover date not updated
December 17, 2019	Removed references to the deprecated 'pause while "Acting as" another user' feature.
October 8, 2019	Minor edit; no content changes.
September 25, 2019	Minor spelling correction; no content changes.
September 24, 2019	Updated the <i>Reassign PO-Based Invoice Created Outside of SAP Concur</i> section.
September 23, 2019	Updated the "Auto-Assign PO-Based Invoices to Original Purchase Request Owner" procedure.
May 11, 2019	Added information about the new View Details link and new comments icon.
February 28, 2019	Fixed a couple more instances of 'payment request'. Updated 'Concur' to SAP Concur'. Updated images and added some details in the 'act as a proxy user' section.
January 30, 2019	Updated the copyright; no other changes; cover date not updated
November 17, 2018	Added Purchase Order Extracts. Updated screenshots with outdated logos (with exceptions). Replaced instances of 'payment request' with 'invoice'.
April 11, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
March 19, 2018	Added information about bill-to address on PO Change Order editable when deleted on original purchase order.
March 17, 2018	Added information about ship-to address on PO Change Order editable when deleted on original purchase order.
October 14, 2017	Added information about hyperlinked invoice and purchase request numbers.

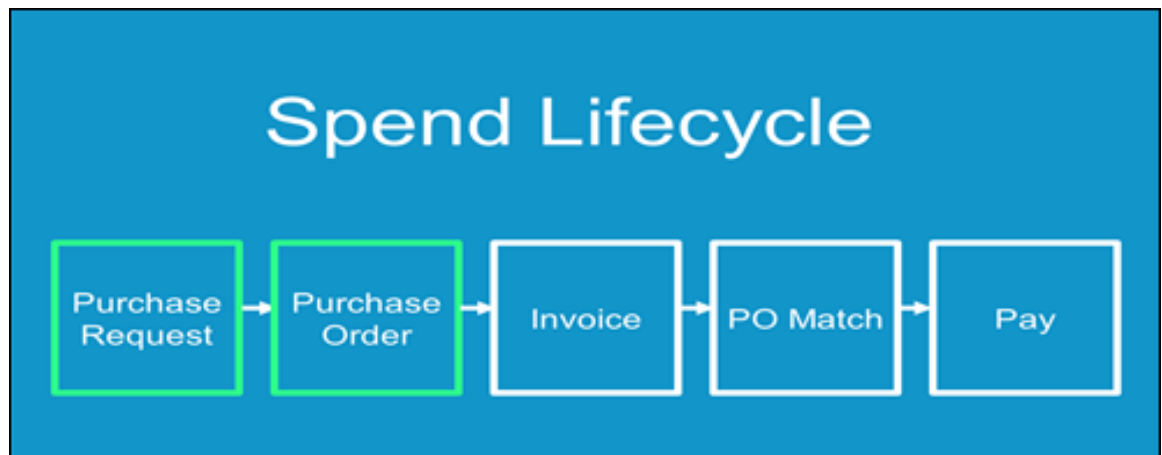
Date	Notes/Comments/Changes
September 16, 2017	Updated some images to show the now available hyperlinked purchase requests and purchase orders in some windows for purchase request users, purchase request processors, and purchase order processors.
July 29, 2017	Added information about transmitted PO PDF emails to vendors displaying all recipients.
June 24, 2017	Added the following information: <ul style="list-style-type: none"> Purchase Request Creators can create invoices from their purchase orders Purchase request users can add notes to vendors for specific purchase request
June 3, 2017	Added the following information: <ul style="list-style-type: none"> Search options for purchase request processors PO contact name and email address available in Vendor list and field for purchase request creators, purchase request approvers, and purchase request processors
April 22, 2017	Added the following information: <ul style="list-style-type: none"> PO Change Order feature Users can change bill-to address on purchase requests Users cannot edit or delete a receipt that is associated with an invoice
March 18, 2017	Added information about purchase request users being able to see the purchase orders resulting from their purchase requests.
January 20, 2017	Added information about Invoice Users being able to reassign invoices to another user.
December 13, 2016	Changed copyright and cover; no other content changes.
December 5, 2016	Updated the guide content to new corporate style; no content changes.
November 4, 2016	Added information about the following: <ul style="list-style-type: none"> The Concur Receiving feature Processor page now displaying all invoices that need to be processed for new clients
October 14, 2016	Added information about the Need By Date field.
September 9, 2016	Added information about the following: <ul style="list-style-type: none"> Purchase request vendor search enhancements Ability to change purchase request policy
August 12, 2016	Added information about warning message appearing for processor in Preview Purchase Order window and updated purchase order images.
July 8, 2016	Added information about searching for a ship-to address.
February 19, 2016	Added information about the following: <ul style="list-style-type: none"> Exporting query results Ability to view account code
	Older revision history has been removed.

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

Purchase Request and Purchase Order


Section 1: Overview

The Purchase Requests and Purchase Orders (PR and PO) feature allows clients to achieve internal spend authorization by using purchase requests. These requests are become purchase orders (documents that authorize a supplier to provide goods or services at specified prices and quantities) in return for payment. When coupled with existing Concur Invoice, PO Matching and Pay functionality, these features provide an end-to-end spend authorization to pay lifecycle.

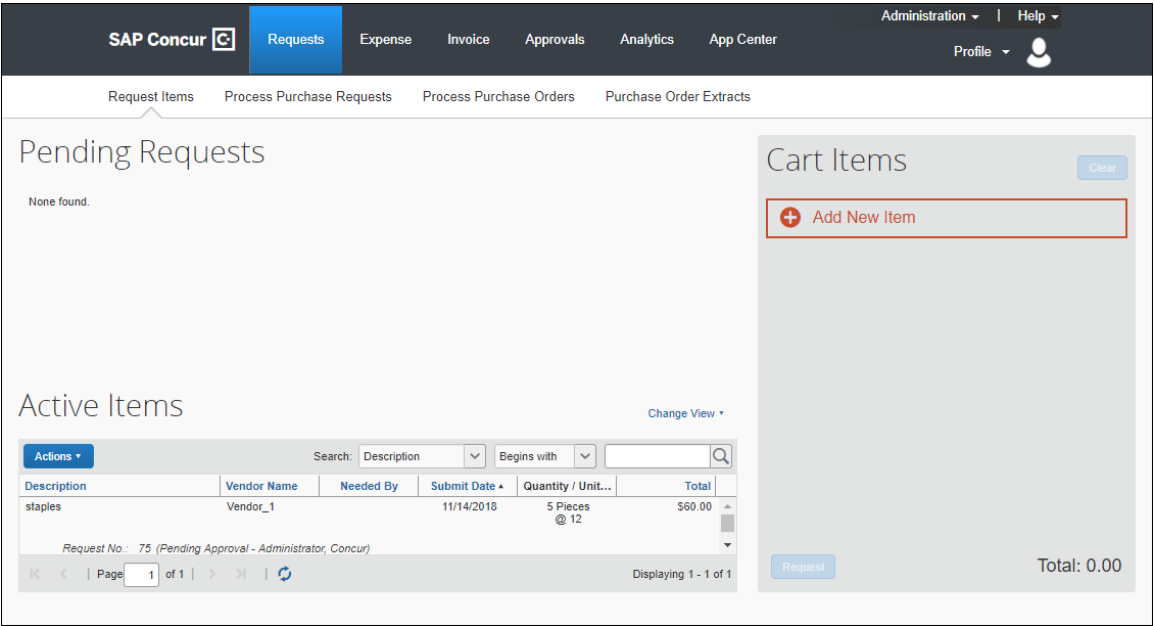


Section 2: Access the Feature

To access the Purchase Request (PR) feature, first ensure that SAP Concur has enabled the feature.

 For more information, refer to the *Concur Invoice: Purchase Request and Purchase Order Setup Guide*.

To access the feature, click **Requests**, and then select an option in the **Purchase Request** menu depending on your user role.



Users who work with purchase requests and purchase orders have a unique view designed to allow rapid entry and review. Additional options allow each user, depending on their role, to submit, approve, and transmit, or as required, return a request to the requestor, or even to terminate the PO *past* its transmittal phase, after it is in the hands of the vendor.

Section 3: What the Purchase Request User Can Do

The user with the Purchase Request User role is limited to opening only the **Pending Requests** page via the **Request > Request Items** menu. When creating the purchase request, the user is assembling goods and/or services request items, then assembling these items under a single PR, using a descriptive name, such as *Flood Damage Repair* or *Christmas Gala 2022*. This is essentially the reverse of tasks presented when creating an invoice in Concur Invoice, where the line items follow the header items. If the user clicks in the **Vendor** field, the five most recently used vendors appear in a list. Users may also click the **More Search Options** link that appears in the vendor list to be able to perform more advanced search options. These search options are also available on the purchase request details page.

New Item

Policy: United States Invoice Po Policy

Type: Goods

Vendor: **Vendor9**

Recently Used Vendors

- Vendor9**
456 Main ST
Anytown, WA 55555
- Vendor8**
345 Main ST
Anytown, WA 55555
KL@Vendor8.com
- Vendor7**
234 Main ST
Anytown, WA 55555
CC@Vendor7.com
- Vendor6**
123 Main ST
Anytown, WA 55555
JJ@Vendor6.com
- Vendor10**
567 Main ST
Anytown, WA 55555

[More Search Options](#)

Receipt Type: [Empty]

Expense Type: [Empty]

Description: [Empty]

Item No: [Empty]

Quantity: [Empty]

Unit Price: [Empty]

Currency: [Empty]

Total: 0.00

Needed By: [Empty]

Unit Of Measure: [Empty]

Create a Purchase Request

Add New Item

The user may create one or more items by first clicking **Add New Item**, selecting the PO policy based on activated country packs, specifying the type of item (Goods or Services), and then selecting a vendor. When selecting a vendor, type the name in the **Vendor** field to view a list of vendors from which to choose.

NOTE: The **Policy** list's field values are determined from the user's Profile configuration on the **Invoice Information** page in Invoice Settings.

The screenshot shows the 'New Item' form. At the top, there are three dropdown menus: 'Policy' (set to 'United States Invoice Po Policy'), 'Type' (set to 'Goods'), and 'Vendor' (with a search icon and the text '<Search for Vendor Name>'). Below the 'Vendor' field is a blue link 'Request New Vendor'. The form is divided into two sections. The top section contains: 'Expense Type' (dropdown, 'Undefined'), 'Description' (text field), 'Item No' (text field), 'Quantity' (text field, '1'), 'Unit Price' (text field, '0'), 'Currency' (dropdown, 'USD-US, Dollar'), 'Total' (text field, '0.00'), 'Needed By' (text field with a calendar icon), and 'Uit Of Measure' (dropdown). At the bottom right are 'Save' and 'Cancel' buttons.

Review Vendor Information

After selecting a vendor, the user can see the vendor address below the **Vendor** field. If the vendor information includes the PO contact name and/or the PO contact email address, this information will also be displayed below the **Vendor** field.

Type:

Vendor:
 Anytown, WA 55555
 Lourdes, Kendra
 KL@Vendor8.com

[Request New Vendor](#) | [View Details](#)

After selecting a vendor in the **Vendor** field, the user can review all available vendor information by clicking **View Details** to open the Vendor **Information** page.

Vendor Information

Actions +

Vendor Name Vendor8	Vendor Code Vendor8_Code	Address Accounting Code V8_AA_Code
Address 1 345 Main ST	Address 2	Address 3
City Anytown	State or Province WA	Postal Code 55555
Currency USD-US, Dollar	Account Number 3068793	Contact First Name
Contact Last Name	Contact Email	Telephone Number
Tax ID	Pay Method Type Client	PO Contact First Name Kendra
PO Contact Last Name Lourdes	PO Contact Phone Number	PO Contact Email KL@Vendor8.com
Address Import Sync ID 6E5F27BB6F2448E2BF22		

Close

Section 3: What the Purchase Request User Can Do

The **View Details** link is also available for each line item in the **Request Items** section when the user views an opened purchase request.

REQUEST ITEMS

☐ Add ☐ Delete ☒ Show Distributions

☐ **Paper** Quantity: 5 Box Total: \$75.00
Expense Type: Office Supplies Unit Price: 15
Vendor8 345 Main ST Needed By: 05/30/2019
Anytown, WA 55555
[View Details](#)
[Show Cont](#)

Account Code	Distribution Code	Percentage	Net Amount
OFS	-SCI-USA (System Default)	100	\$75.00

The PO contact name, email address, and **View Details** link are also visible in the **Request Items** section of a purchase request line item that is opened for editing.

Vendor

Vendor8
345 Main ST
Anytown, WA 55555
Lourdes, Kendra
KL@Vendor8.com
[View Details](#)

Request New Vendor

When adding new items to a purchase request, the user can also request a new vendor by clicking **Request New Vendor**.

New Item

Policy

Type

Vendor

[Request New Vendor](#)

The **Request New Vendor** page appears.

Request New Vendor

Actions *

Vendor Name Address 1 Address 2

Address 3 City State or Province

Postal Code Currency Account Number

Contact First Name Contact Last Name Contact Email

Telephone Number Tax ID Pay Method Type

PO Contact First Name PO Contact Last Name PO Contact Phone Number

PO Contact Email Address Import Sync ID

OK Cancel Apply

After entering the required information and clicking **OK**, the new vendor is added to the system with a status of **Unapproved**.

NOTE: The Vendor Manager reviews and approves the vendor as appropriate. For more information, refer to the *Concur Invoice: Administration User Guide for Standard Edition*.

The user can now fill out the remaining fields for the purchase request type. Required fields are marked with a red bar.

Expense Type Undefined

Description

Item No

Quantity 1

Unit Price 0

Currency USD-US, Dollar

Total 0.00

Needed By

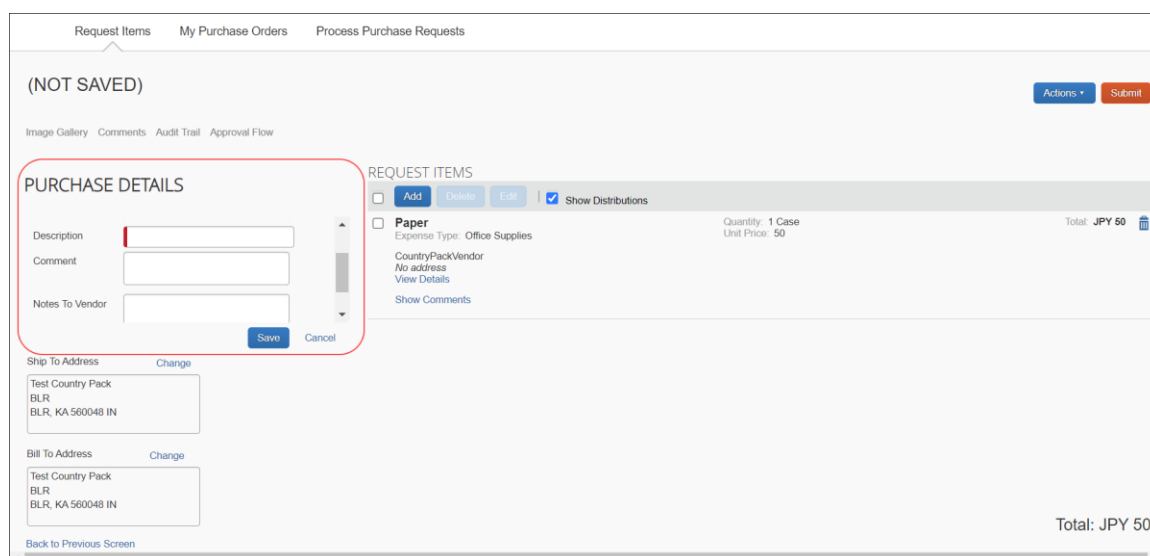
Unit Of Measure Each

NOTE: If the user selects a needed-by date, this date appears on the **Purchase Order** page and in the **Preview Purchase Order** window. If the field is left blank, the purchasing admin will not see this field in the **Preview Purchase Order** window.

Enter Purchase Request Details

After entering the required information, the user clicks **Request** and the **Purchase Details** page opens.

To save the request, the user must fill in the required purchase request header information. The required fields are marked with a red bar.

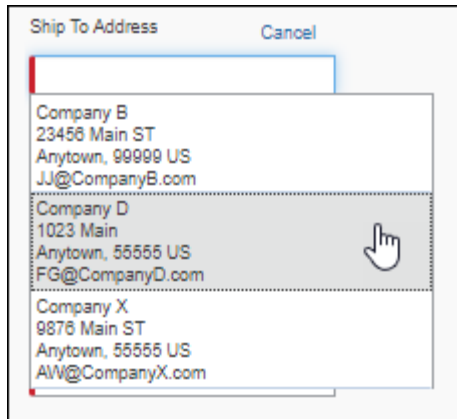


SET SHIP TO AND BILL TO ADDRESSES

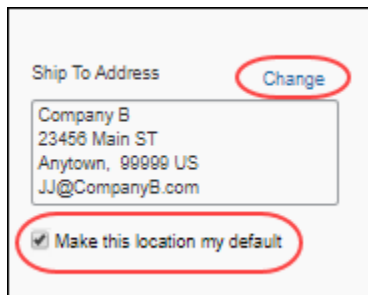
When the user clicks in the **Ship To Address** or **Bill To Address** field, a list of the addresses that the Invoice Admin configured in **Product Settings > Company Locations** displays.



For more information about company locations, refer to the *Concur Invoice: Company Locations User Guide*.



After selecting an address, the user can change the address by clicking **Change** or make the address their default shipping address by selecting (enabling) **Make this location my default**.



The default address will be selected in the **Ship To Address** field automatically when new purchase requests are created.

The default shipping address can be changed by clicking **Change** on the **Purchase Details** page, changing the address, and then re-selected (enabling) **Make this location my default**.

Section 3: What the Purchase Request User Can Do

The user can also change the default shipping address by going to **Profile > Profile Settings > Invoice Preferences**.

The screenshot displays the 'Invoice Preferences' page for a Concur Administrator. The left sidebar contains navigation links for 'Your Information', 'Expense Settings', 'Invoice Settings', and 'Other Settings'. The main content area is titled 'Invoice Preferences' and includes sections for 'Send email when...', 'Prompt...', and 'Images'. A red box highlights the 'Purchase Request / Invoice (for Tax Validation)' section, which contains a 'Default Shipping Address' dropdown menu set to 'None'. Another red box highlights the 'Profile Settings' link in the top right navigation bar.

ADDITIONAL FIELDS

You can add comments for purchase request users, approvers and processors and add notes to the vendor about a purchase request.

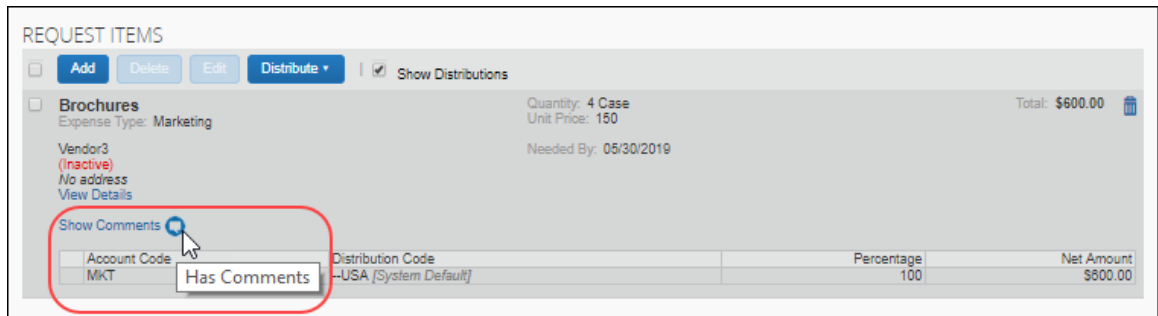
The screenshot shows the 'PURCHASE DETAILS' form. It features three input fields: 'Description', 'Comment', and 'Notes To Vendor'. The 'Comment' and 'Notes To Vendor' fields are grouped together by a red box. At the bottom right, there are 'Save' and 'Cancel' buttons.

Manage a Pending Request

Clicking **Save** adds the request to the **Pending Requests** section on the **Request Items** page.

Prior to submitting the request, you can add line items, edit existing line items, submit, edit, or delete the request. In addition, you can use the **Actions** menu to add an image and you can review comments and the audit trail.

If comments have been added to a purchase request line item or purchase request header, an icon displays next to the **Show Comments** link.



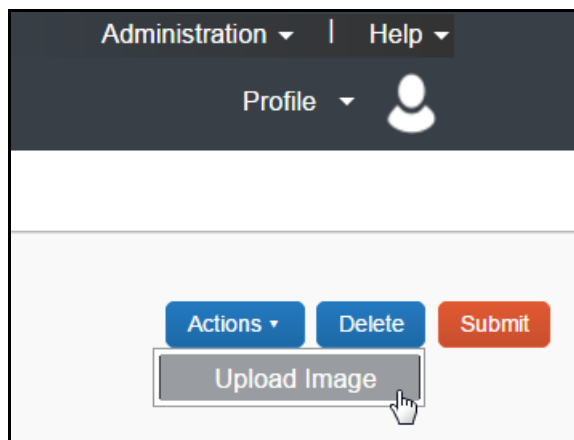
After you submit the purchase request, you can no longer make changes to the request.

Manage Images

The user can upload, view, and delete images. In addition, the user can attach supporting documents to a purchase order that transmits to a vendor by selecting (enabling) the **Include in PO Transmission** check box in the **Upload Image** window. Further, the user can choose documents that are already available for a purchase request and attach these documents for the vendor.

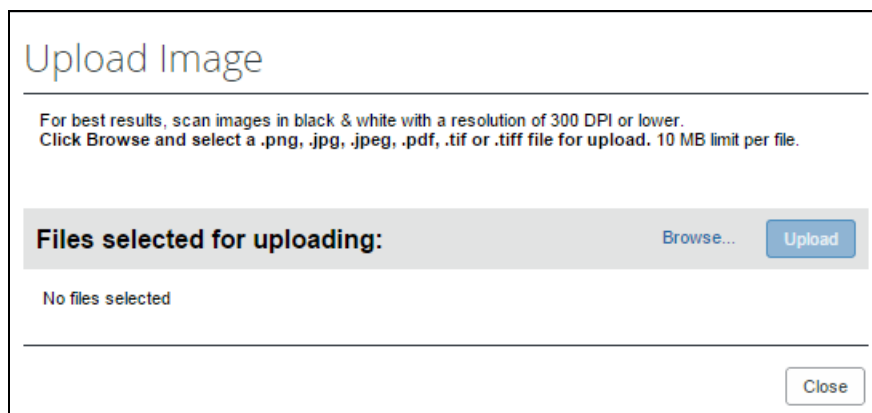
► To upload an image

1. Click **Actions** > **Upload Image**.




Section 3: What the Purchase Request User Can Do

The **Upload Image** window appears.



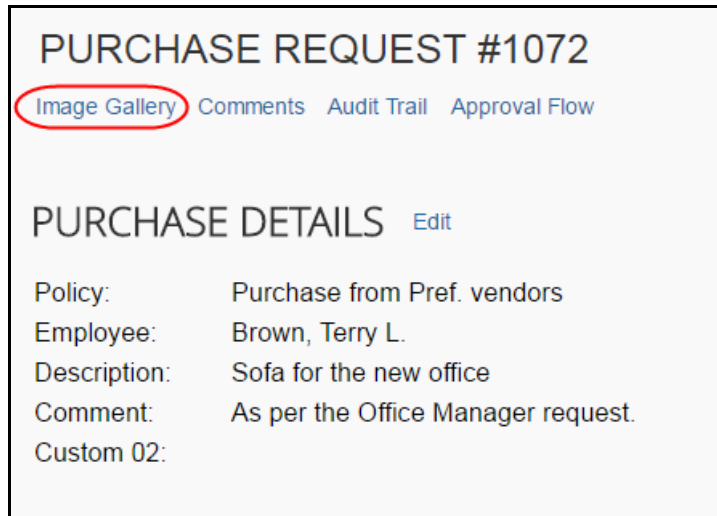
2. Click **Browse** and select the desired image by double-clicking it, or by selecting it and clicking **Open**.
3. (Optional) Select (enable) the **Include in PO Transmission** check box.



4. Click **Upload**.
5. Click **Close**.

► **To view an image:**

1. On the **Request** page, click **Image Gallery**.



PURCHASE REQUEST #1072

[Image Gallery](#) [Comments](#) [Audit Trail](#) [Approval Flow](#)

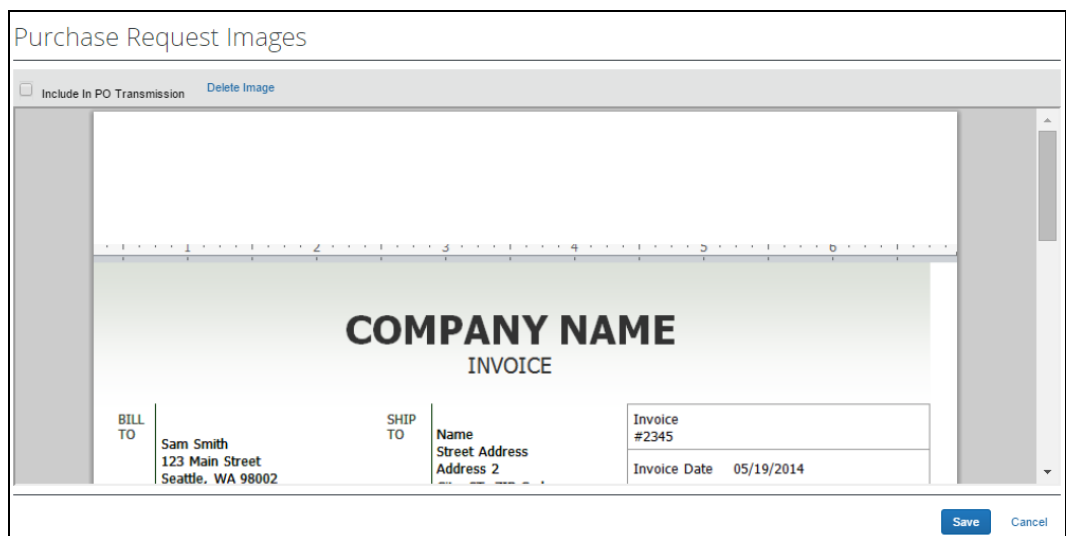
PURCHASE DETAILS [Edit](#)

Policy: Purchase from Pref. vendors
 Employee: Brown, Terry L.
 Description: Sofa for the new office
 Comment: As per the Office Manager request.
 Custom 02:

The **Purchase Request Images** window appears. If there are more than one image or supporting document, you can toggle between them by using the **Next** and **Previous** buttons.

NOTE: You can also include supporting documents in the PO transmission from the **Purchase Request Images** window by selecting (enabling) the **Include in PO Transmission** check box.

NOTE: The approver and purchasing admin, who processes purchase requests, can view images and include supporting documents in the PO transmission. The processor can also delete images, whereas approver cannot.



Purchase Request Images

☐ Include In PO Transmission [Delete Image](#)

COMPANY NAME
INVOICE

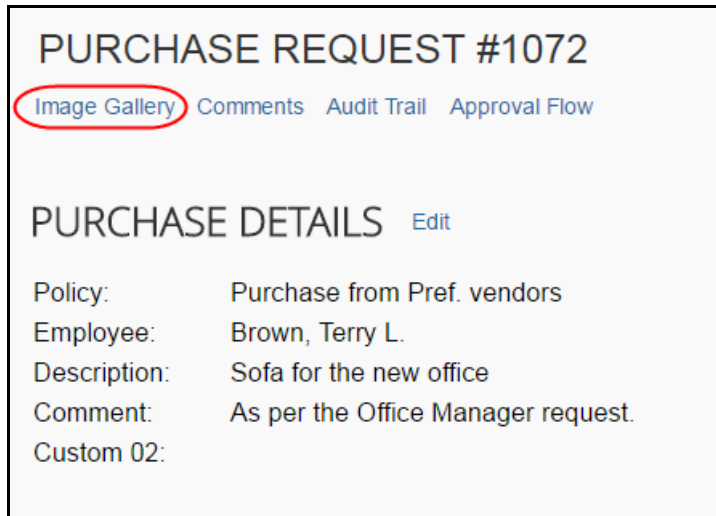
BILL TO	Sam Smith 123 Main Street Seattle, WA 98002	SHIP TO	Name Street Address Address 2	Invoice #2345
				Invoice Date 05/19/2014

[Save](#) [Cancel](#)

2. Click **Save** or **Cancel** when you are done.

► **To delete an image:**

1. On the **Request** page, click **Image Gallery**.



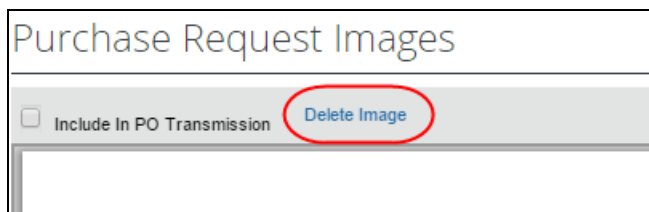
PURCHASE REQUEST #1072

[Image Gallery](#) [Comments](#) [Audit Trail](#) [Approval Flow](#)

PURCHASE DETAILS [Edit](#)

Policy: Purchase from Pref. vendors
Employee: Brown, Terry L.
Description: Sofa for the new office
Comment: As per the Office Manager request.
Custom 02:

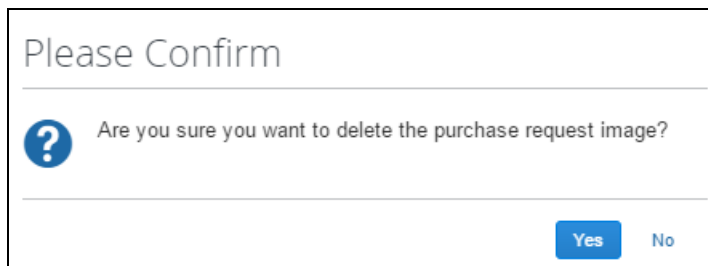
2. In the **Purchase Request Images** window, click **Delete Image**.




Purchase Request Images

☐ Include in PO Transmission [Delete Image](#)

The **Please Confirm** window appears.



Please Confirm

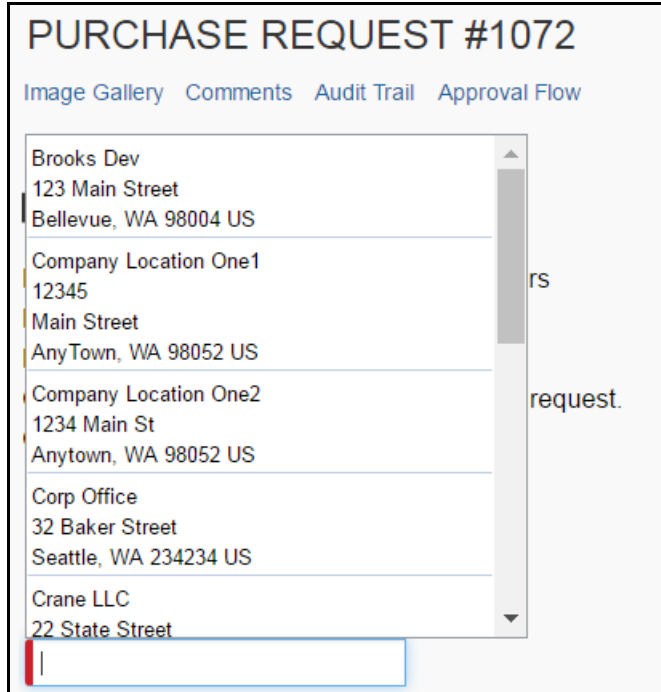
 Are you sure you want to delete the purchase request image?

[Yes](#) [No](#)

3. Click **Yes**. Once you have deleted an image, the next image, if there is one, appears.

Search for a Ship-to Address

To search for a ship-to address, start entering the company name in the **Ship To Address** field. The list that appears shows the company name and the full address details. In addition, the list shows the default address.



The screenshot shows the 'PURCHASE REQUEST #1072' interface. At the top, there are tabs for 'Image Gallery', 'Comments', 'Audit Trail', and 'Approval Flow'. Below these tabs is a dropdown menu for selecting a ship-to address. The dropdown list contains the following entries:

- Brooks Dev
123 Main Street
Bellevue, WA 98004 US
- Company Location One1
12345
Main Street
AnyTown, WA 98052 US
- Company Location One2
1234 Main St
Anytown, WA 98052 US
- Corp Office
32 Baker Street
Seattle, WA 234234 US
- Crane LLC
22 State Street

Below the dropdown list is an input field with a red vertical bar on the left side, indicating the search criteria.

Change Ship-To or Bill-To Address

The purchase request user can change the ship-to or bill-to address on purchase requests, so that they can send the vendor the correct address to which to ship or bill the request. Users can switch to any ship-to or bill-to address available for their company.

The default ship-to or bill-to address that is used on policy level should be used for the purchase request. If the user changes the policy on the purchase request, the system does not change the ship-to or bill-to address on the purchase request since the user might have changed this previously from the former policy default.

► **To change the ship-to or bill-to address:**

1. Double-click the desired purchase request. The **Purchase Request** window appears.
2. In the **Ship To** or **Bill To** section, click **Change**.

The screenshot displays the 'Purchase Request #1072' window. At the top, it says 'Not Submitted'. Below this, there are links for 'Image Gallery', 'Comments', 'Audit Trail', and 'Approval Flow'. The main section is titled 'PURCHASE DETAILS' with an 'Edit' link. It contains the following information:

Policy:	Purchase from Pref. vendors
Employee:	Brown, Terry L.
Description:	Sofa for the new office
Comment:	As per the Office Manager request.
Custom 02:	

Below the details, there are two address sections:

Ship To Address (with a red-circled 'Change' button):

Brooks Dev
123 Main Street
Bellevue, WA 98004 US

Bill To Address (with a red-circled 'Change' button):

Corp Office
Baker Street
Cityville, Stanton 778667 US

3. In the **Ship To or Bill To** field, click the field to select a different ship-to or bill-to address. (Example of **Bill To** field below.)

Not Submitted

Purchase Request #53

[Image Gallery](#) [Comments](#) [Audit Trail](#) [Approval Flow](#)

PURCHASE DETAILS [Edit](#)

Policy: Purchase from Preferred Vendors
Employee: Brown, Terry L.
Description: Printer Toner
Comment: None

Ship To Address [Change](#)

Vancouver Art Gallery
750 Hornby Street
Vancouver, BC V6Z 2H7

☐ Make this location my default

Bill To Address

[Filter by Company Location Name](#)

4. Click **Save**.

Create and Submit a PO Change Order

Provided SAP Concur or the client admin has activated the PO Change Order feature, the purchase request user will be able to start creating PO change orders from their transmitted purchase orders. The purchase request user first locates the purchase order from which they would like to create a change order by clicking **Requests > Purchase Requests > My Purchase Orders**.

SAP Concur [Requests](#) [Travel](#) [Expense](#) [Invoice](#) [Approvals](#) [Reporting](#) [App Center](#) [Administration](#) [Help](#)

[Manage Requests](#) [Create New](#) [Process Requests](#) [Quick Search](#) [Budget Insight](#) [Purchase Requests](#)

Active Requests (5)

[View](#)

Request Name [Begin With](#) [Go](#)

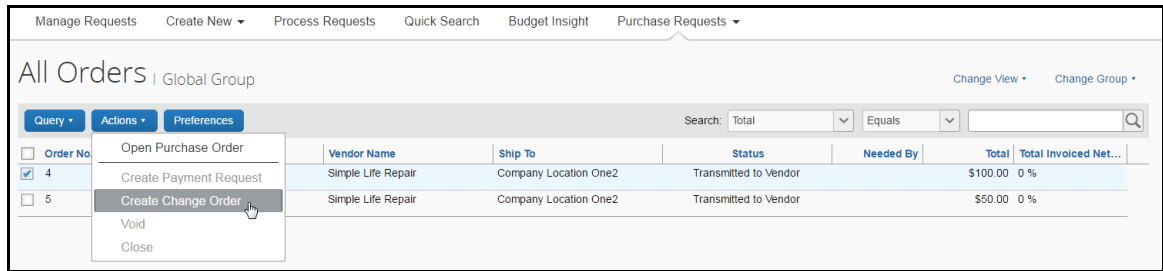
[Request Items](#)
[My Purchase Orders](#)
[Process Purchase Requests](#)


[Delete Request](#) [Copy Request](#) [Close/Inactivate Request](#)

	Request Type	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved a...	Remaining ...	Action
<input type="checkbox"/>	Travel	Trip from Seattle to San Francisco f7zbvzdvb	339E	Submitted & Pending Approval - Davis, Pat R.	09/13/2016 09/14/2016	06/26/2016	€629.84	€0.00	€0.00	
<input type="checkbox"/>	Event	Training Class New software training.	334H	Not Submitted	08/24/2015 08/25/2015		\$648.00	\$0.00	\$0.00	

From the **All Orders** page, the purchase request user can view their purchase orders in read-only mode, but will be able to select a transmitted purchase order, and then clicks **Actions > Create Change Order**.

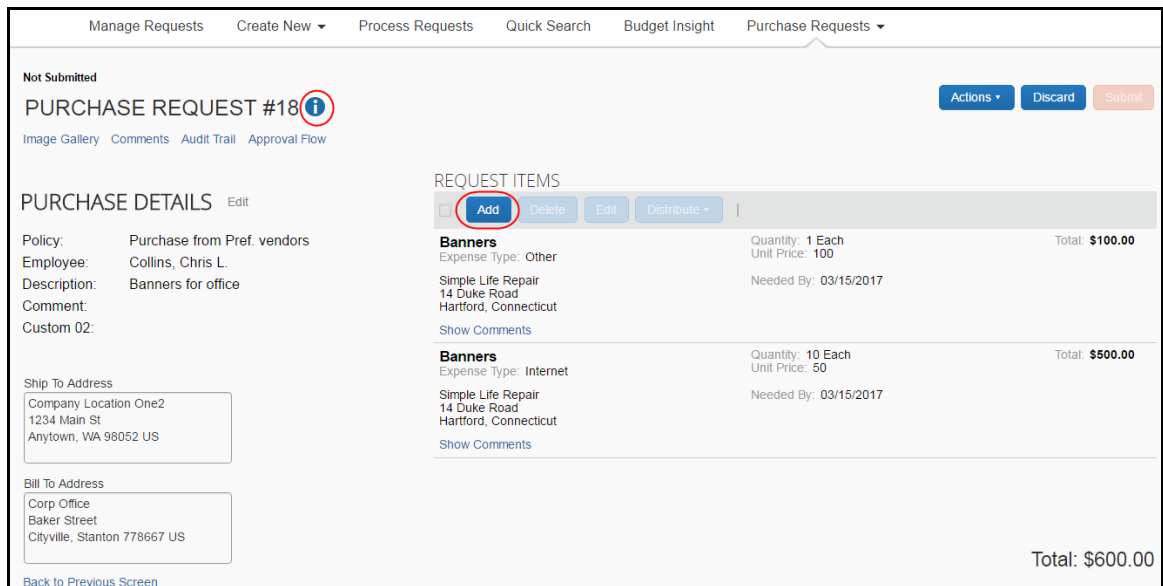
Section 3: What the Purchase Request User Can Do



The purchase order will now return to the original purchase request, and an  icon appears on the now unsubmitted purchase request. As a matter of fact, most users who work with a specific purchase request or purchase order that is in a PO Change Order mode will see this icon next to the purchase request/purchase order.

NOTE: Once the purchase order is in a PO Change Order mode, additional changes cannot be requested for that purchase order until it has been approved.

The purchase request user can now add new line items to the purchase request by opening the purchase request and clicking **Add**.



Apart from adding line items, the purchase request user can edit, delete, or distribute line(s) they have just added. All other fields will be read-only, such as vendor details. In addition, they can add or update the ship-to and bill-to addresses on the PO Change Order if the addresses were deleted on the original purchase order. When the purchase request user has added the desired line items, they need to click **Save**.

Section 3: What the Purchase Request User Can Do

Not Submitted

PURCHASE REQUEST #18

Image Gallery Comments Audit Trail Approval Flow

PURCHASE DETAILS Edit

Policy: Purchase from Pref. vendors
Employee: Collins, Chris L.
Description: Banners for office
Comment:
Custom 02:

Ship To Address
Company Location One2
1234 Main St
Anytown, WA 98052 US

Bill To Address
Corp Office
Baker Street
Cityville, Stanton 778667 US

REQUEST ITEMS

Policy: Purchase from Pref. vendors
Type: Goods
Vendor: Simple Life Repair
14 Duke Road
Hartford, Connecticut

Expense Type: **Internet**
Receipt Type: Quantity Receipt
Quantity: 1
Unit of Measure: Each
Unit Price: 0
Tax:
VAT Rate:
Currency: USD-US, Dollar
Total: 0.00
Needed By: 03/15/2017

Comment

Save Cancel
Total: \$600.00

Back to Previous Screen

After saving the purchase request, the purchase request user is taken back to the purchase request details page from which they can click **Submit** to send the purchase request for approval. The purchase request will go through the same approval workflow as previously.

NOTE: If the purchase request is part of a limit approval workflow, the approval workflow will be based on the new total purchase order amount.

Not Submitted

PURCHASE REQUEST #18

Image Gallery Comments Audit Trail Approval Flow

PURCHASE DETAILS Edit

Policy: Purchase from Pref. vendors
Employee: Collins, Chris L.
Description: Banners for office
Comment:
Custom 02:

Ship To Address
Company Location One2
1234 Main St
Anytown, WA 98052 US

Bill To Address
Corp Office
Baker Street
Cityville, Stanton 778667 US

REQUEST ITEMS

Add **Delete** **Edit** **Distribute**

Banners Expense Type: Other Simple Life Repair 14 Duke Road Hartford, Connecticut Show Comments	Quantity: 1 Each Unit Price: 100 Needed By: 03/15/2017	Total: \$100.00
Banners Expense Type: Internet Simple Life Repair 14 Duke Road Hartford, Connecticut Show Comments	Quantity: 10 Each Unit Price: 50 Needed By: 03/15/2017	Total: \$500.00
Banners Expense Type: Other Simple Life Repair 14 Duke Road Hartford, Connecticut	Quantity: 1 Each Unit Price: 50 Needed By: 03/15/2017	Total: \$50.00

Total: \$650.00

Submit

Back to Previous Screen

Edit an Existing Purchase Request

To edit a purchase request, for example adding items, double-click it directly and use the instructions in the *Create a Purchase Request* section as a guide.

NOTE: Once the purchase request has been submitted, the purchase request user cannot edit the request.

Delete an Existing Purchase Request

The user can delete a purchase request by clicking the **Trash** icon for the unsubmitted request on the **Pending Requests** page, or, by clicking **Delete** if the user has opened the request.



Cancel a Change Request

If the purchase request user wants to cancel any current unsubmitted change requests they are working on, for example, if a manager does not approve a change and sends the request back to the purchase request user, they can do so by clicking **Discard**.

Copy an Existing Purchase Request

The user can copy a purchase request to create a new request. Do this by either:

- **Unsubmitted Request:** Clicking the **Copy** icon for the unsubmitted request

- **Submitted Request:** Selecting the request and then clicking **Copy Request** from the **Actions** menu of the submitted request

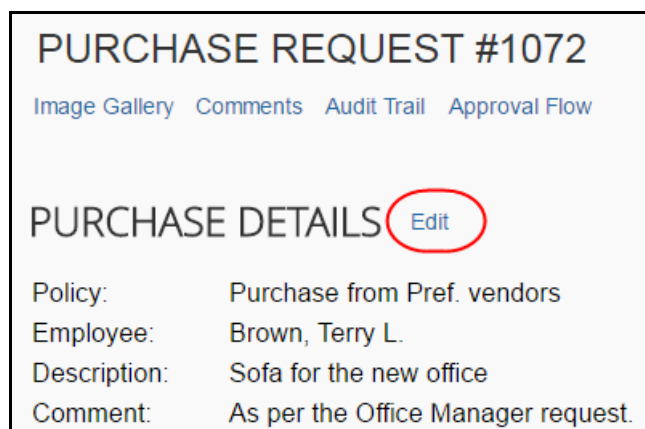
NOTE: A user cannot copy a request that is associated with a closed purchase order.

Change Purchase Request Policy

Purchase request users can change policies of unsubmitted purchase requests, for example, if they have selected incorrect ones.

Concur Invoice will track the change of policy in the audit trail.

To change the policy, the user needs to open the purchase request and click the **Edit** link.



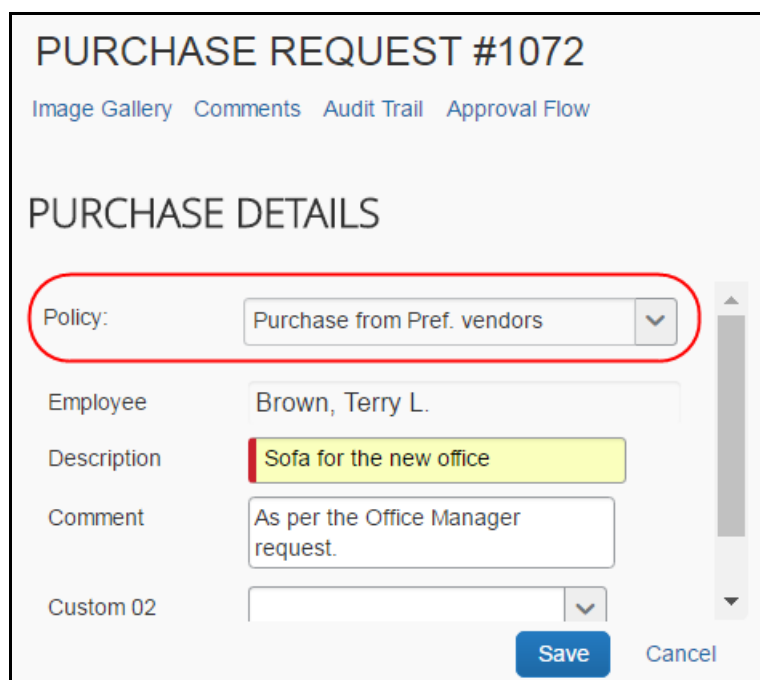
PURCHASE REQUEST #1072

[Image Gallery](#) [Comments](#) [Audit Trail](#) [Approval Flow](#)

PURCHASE DETAILS [Edit](#)

Policy: Purchase from Pref. vendors
Employee: Brown, Terry L.
Description: Sofa for the new office
Comment: As per the Office Manager request.

Then, in the **Policy** list, the user can change the policy and click **Save**.



PURCHASE REQUEST #1072

[Image Gallery](#) [Comments](#) [Audit Trail](#) [Approval Flow](#)

PURCHASE DETAILS

Policy: Purchase from Pref. vendors ▼

Employee: Brown, Terry L.

Description: Sofa for the new office

Comment: As per the Office Manager request.

Custom 02: ▼

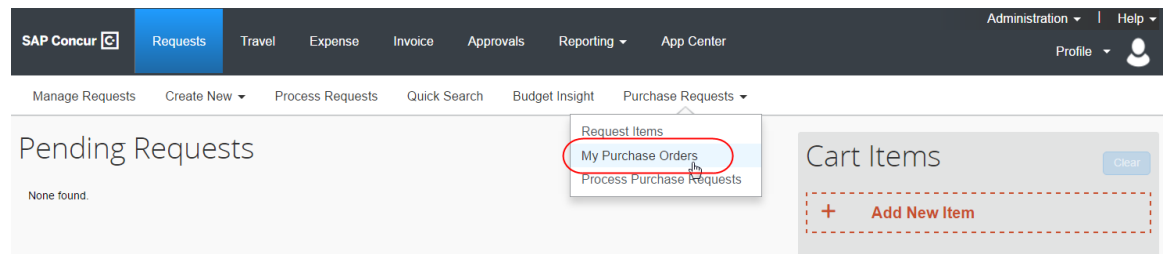
Save Cancel

Submit a Purchase Request

Once submitted, the purchase request is first moved to the **Active Items** section pending final approval and processing, and then order generation and transmittal to the supplier.

View Purchase Orders

Purchase request users can view the purchase orders resulting from their created purchase requests. To do so, in the **Purchase Request** menu, click **My Purchase Orders**.

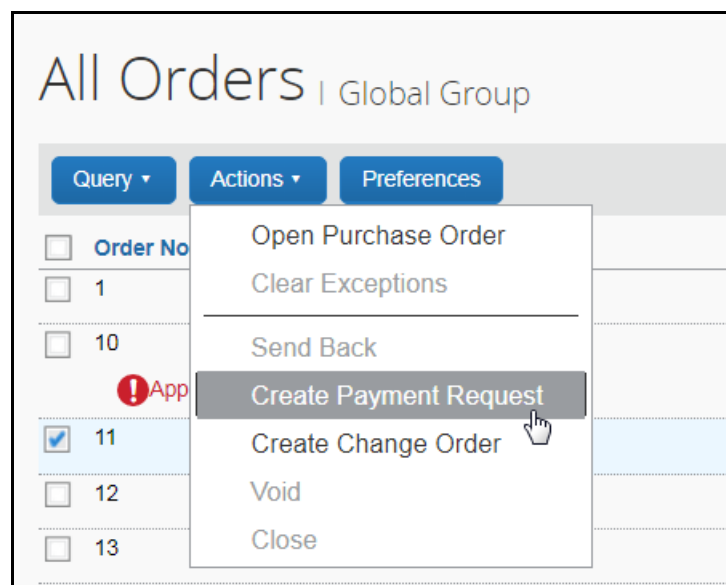


NOTE: If you are both a purchase request user and a purchase request processor, you will not see the **My Purchase Orders** menu option.

Create Invoices From Purchase Orders

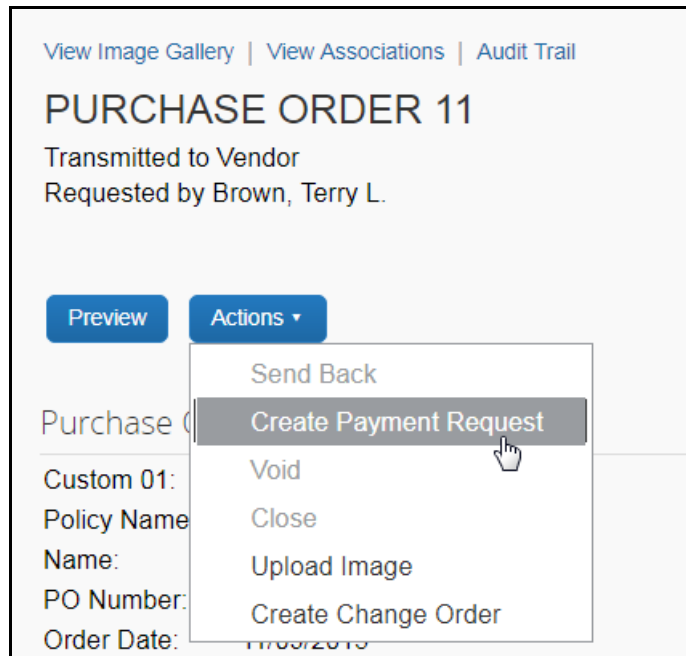
Purchase request creators can create invoices from their own transmitted purchase orders by selecting the **Create Payment Request** option in the **Actions** menu, either from the **All Orders** page or from an opened purchase order.

All Orders page:



Section 3: What the Purchase Request User Can Do

Purchase Order page:



Recall a Purchase Request

The purchase request user can recall a purchase request that they have submitted but that the approver has not yet approved.

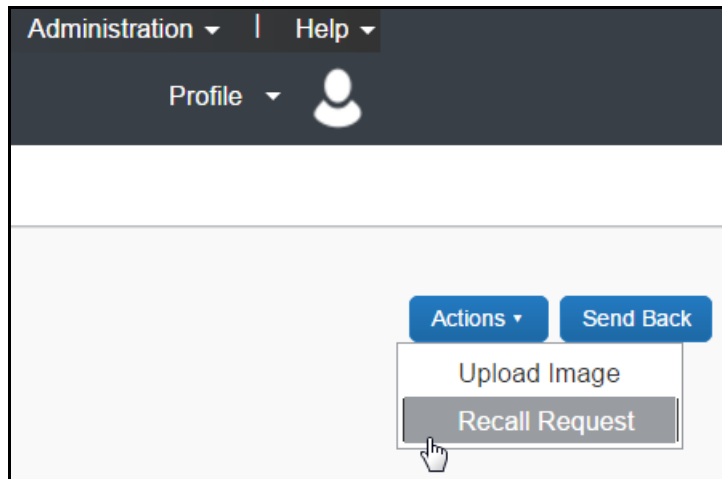
► **To recall a purchase request:**

1. On the **Pending Requests** page, double-click the submitted, but the not yet approved purchase request.

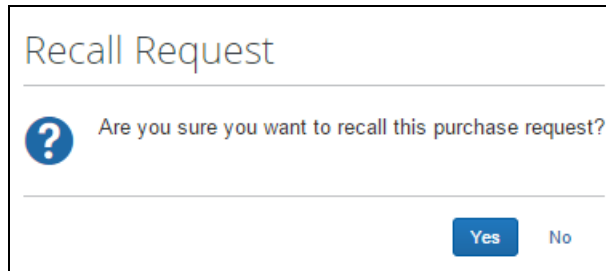
The screenshot shows the 'Active Items' table. At the top, there is a search bar with 'Description' selected and a 'Change View' link. Below the search bar is an 'Actions' button. The table has columns: 'Description', 'Vendor Name', 'Needed By', 'Submit Date', 'Quantity / Unit ...', and 'Total'. There are two rows of data. The first row is for 'Services' from 'Concave' with a submit date of '09/03/2015' and a total of '\$78.00'. Below this row, it says 'Request No.: 29 (Pending Processor Review)'. The second row is also for 'Services' from 'Concave' with a submit date of '09/03/2015' and a total of '\$78.00'. This row is highlighted with a red box, and below it, it says 'Request No.: 25 (Pending Approval - Collins, Chris L.)'.

Description	Vendor Name	Needed By	Submit Date	Quantity / Unit ...	Total
Services	Concave		09/03/2015	1 Each @ 78	\$78.00
Request No.: 29 (Pending Processor Review)					
Services	Concave		09/03/2015	1 Each @ 78	\$78.00
Request No.: 25 (Pending Approval - Collins, Chris L.)					

2. On the **Request** page, in the **Actions** menu, click **Recall Request**.



3. In the **Recall Request** window that appears, click **Yes**.



Auto-Assign PO-Based Invoices to Original Purchase Request Owner

SAP Concur created or externally created PO-based invoices that can be automatically assigned to the purchase request owner provided the **Assign invoice to Purchase Request Owner** option is selected (enabled) in the **Approval Routing** step of Product Settings.

This means that Concur Invoice will try to find the purchase request owner of the PO-based invoices. When the PR owner is found, Concur Invoice will automatically assign the purchase request owner as the invoice owner of the PO-based invoices.



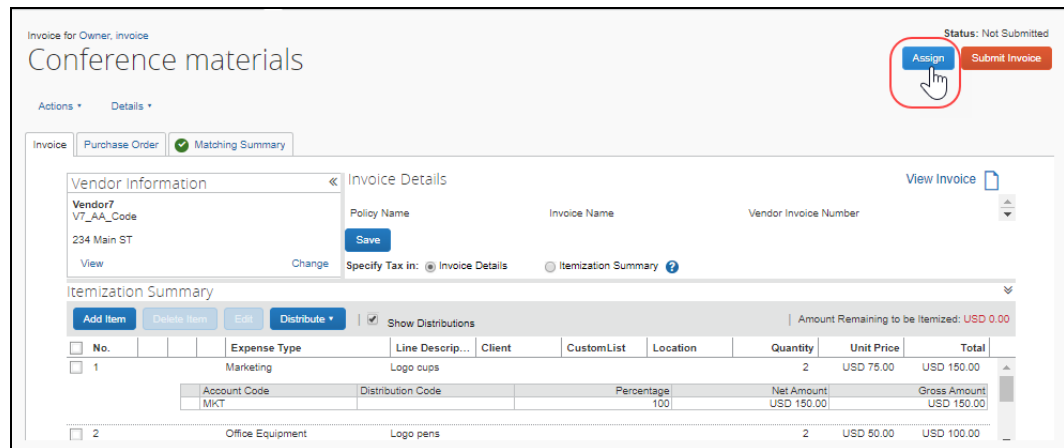
For more information, refer to the *Concur Invoice: Approval Routing Setup Guide for Standard Edition*.

Reassign PO-Based Invoices Created Within Concur Invoice

If the user wants to assign the unsubmitted PO-based invoice, where the PO is generated within Concur Invoice, they can do so from the **My Invoices** page.

► To reassign a PO-based invoice:

1. Open the invoice and then click the **Assign** button.



Invoice for Owner, invoice

Conference materials

Status: Not Submitted

Assign Submit Invoice

Actions • Details •

Invoice Purchase Order Matching Summary

Vendor Information Invoice Details View Invoice

Vendor7 V7_AA_Code 234 Main ST

Policy Name Invoice Name Vendor Invoice Number

Save

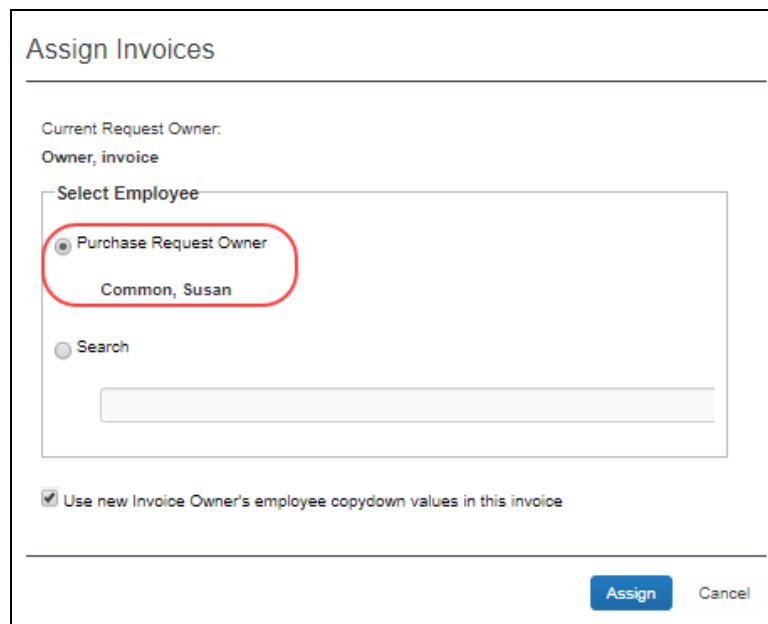
Specify Tax in: Invoice Details Itemization Summary

Itemization Summary

Add Item Delete Item Edit Distribute Show Distributions Amount Remaining to be Itemized: USD 0.00

No.	Expense Type	Line Descrip...	Client	CustomList	Location	Quantity	Unit Price	Total
1	Marketing	Logo cups				2	USD 75.00	USD 150.00
Account Code		Distribution Code	Percentage			Net Amount	Gross Amount	
MKT			100			USD 150.00	USD 150.00	
2	Office Equipment	Logo pens				2	USD 50.00	USD 100.00

The **Assign Invoices** window appears..



Assign Invoices

Current Request Owner:
Owner, invoice

Select Employee

☒ Purchase Request Owner
Common, Susan

☐ Search

☒ Use new Invoice Owner's employee copydown values in this invoice

Assign Cancel

2. Select the purchase request owner (the default selection) or search for the desired owner.
3. Click **Assign**.

Reassign PO-Based Invoice Created Outside of Concur Invoice

In cases where the AP user needs to assign the externally created PO-based invoice, they can do so by clicking the **Assign** button or the **Select Invoice Owner** link.



If they click the **Assign** button, the **Assign Invoices** window appears where the AP user can see who requested the purchase order or search for the desired owner and assign the PO-based invoice to that user.

 A screenshot of the "Assign Invoices" window. The title "Assign Invoices" is at the top. Below it is a section titled "Select Employee". Inside this section, there are two radio buttons: "PO Requested By" (which is selected) and "Search". Below the "PO Requested By" radio button, there is a message "* No employee found *". Below the "Search" radio button, there is a text input field. At the bottom of the window, there is a checkbox labeled "Use new Invoice Owner's employee copydown values in this invoice" which is checked. At the bottom right, there are two buttons: "Assign" and "Cancel".

Manage Receipts and Receipt Images

Purchase Request Owners, who work with the Receiving feature, can add, edit, delete receipts and receipt images of the transmitted purchase order provided the **Allow Purchase Request Owners to Edit their own Purchase Orders** option is selected (enabled) in Invoice Settings.

NOTE: If a receipt is associated with an invoice, a user will not be able to edit or delete the receipt and the **Edit** and **Delete** buttons will be disabled. If a user needs to make changes to an invoice, they need to first unassociated the receipt to the invoice.

Section 3: What the Purchase Request User Can Do



For more information, refer to the *Concur Receiving* section of the *Concur Invoice: Purchase Order Matching User Guide*.

Search for a Purchase Request

Purchase request users can search for their submitted purchase requests in the search area by selecting different search criteria, such as *Vendor Name*, *Item Total*, or *Order No.*

Description	Vendor Name	Needed By	Submit Date	Order No.	Total
Pens, pencils, and erasers	Home Style		02/06/2015		\$25.00
Request No.: 13 (Pending Approval - Simpson, Frank)					
Office cleaning	Home Style		02/06/2015		\$760.35

Change View Search Option

Purchase request users can also use the **Change View** menu to display active items or items submitted by date range. By changing the view, the result appears on the page.

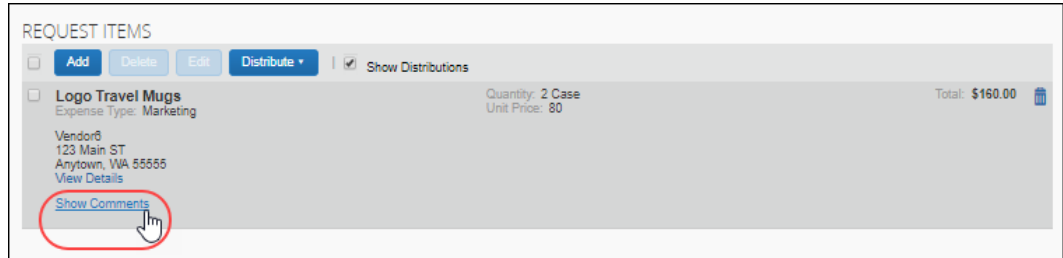
Search:	Item Total	Quantity / Unit Price	Order No.
5	50 Each @ 0.5		
5	1 Each @ 760.35		

Add a Comment to an Item

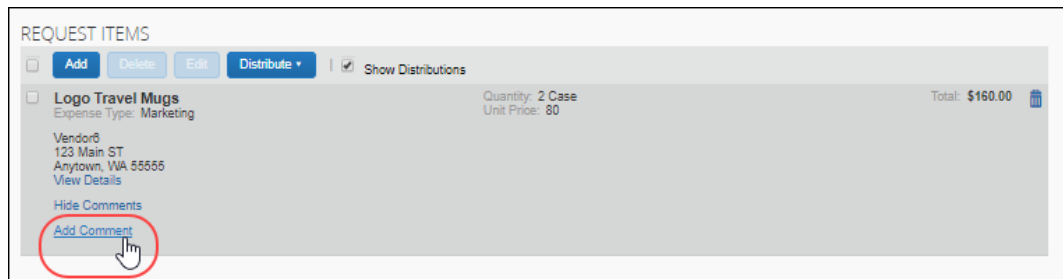
Purchase request users can add comments to an item to clarify an item or to provide more information about an item.

► **To add a comment to an item:**

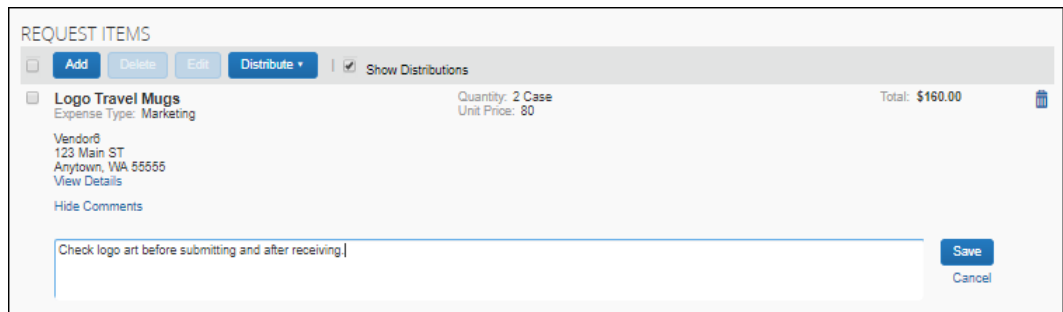
1. Open the desired purchase request.
2. In the **Items** section, click **Show Comments**.



3. Click the **Add Comment** link that appears.



4. In the comments field, type the comment, and then click **Save**.



Section 3: What the Purchase Request User Can Do

The comment appears in the **Request Items** section.

The screenshot shows the 'REQUEST ITEMS' section with a table of items. The first item is 'Logo Travel Mugs' with an expense type of 'Marketing', quantity of '2 Case', and unit price of '80'. The total is '\$160.00'. Below the item name, the vendor information is listed: 'Vendor: 123 Main ST, Anytown, WA 55555'. A 'View Details' link is present. A 'Hide Comments' link is also visible. A comment is displayed below the 'Hide Comments' link: 'Company Admin added a comment - 05/09/2019 02:49 PM. Check logo art before submitting and after receiving.' The comment is circled in red.

If comments have been added but are hidden, an icon is displayed next to the **Show Comments** link.

The screenshot shows the 'REQUEST ITEMS' section with a table of items. The first item is 'Logo Travel Mugs' with an expense type of 'Marketing', quantity of '2 Case', and unit price of '80'. The total is '\$160.00'. Below the item name, the vendor information is listed: 'Vendor: 123 Main ST, Anytown, WA 55555'. A 'View Details' link is present. A 'Show Comments' link is also visible, with a blue speech bubble icon next to it. A tooltip 'Has Comments' is displayed over the icon.

View Comments

The purchase request user can view comments about the purchase request that they have entered in the **Details** section of the purchase request or that the approver has entered when they have sent back a purchase request to the user.

► To view comments:

1. Open the desired purchase request.
2. If comments have been added at the header level of the purchase request, an icon displays next to the **Comments** link. Click **Comments** to review the comments.

Section 3: What the Purchase Request User Can Do

Not Submitted

PURCHASE REQUEST #200

[Image Gallery](#) [Comments](#) [Audit Trail](#) [Approval Flow](#)

[Has Comments](#)

PURCHASE DETAILS [Edit](#)

Employee Name:	Admin, Company
Description:	Brochures
Comment:	Ordered for the conference.
Notes To Vendor:	Deliver to 2nd floor reception
Project:	
Region:	(USA) United States

3. In the **Comment History** window that appears, view the comments about the purchase request.

Comment History ×

Date ▼	Entered By	Comment Text
05/09/2019	Admin, Company	Ordered for the conference.

[Close](#)

4. Click **Close**.

View the Audit Trail

To review the audit trail, open the purchase request, and then click **Audit Trail**.

PURCHASE REQUEST #1072

[Image Gallery](#) [Comments](#) [Audit Trail](#) [Approval Flow](#)

PURCHASE DETAILS [Edit](#)

Policy: Purchase from Pref. vendors
Employee: Brown, Terry L.
Description: Sofa for the new office
Comment: As per the Office Manager request.
Custom 02:

The **Audit Trail** window appears with information about actions that the purchase request user and the system have taken on the specific purchase request.

Audit Trail			
Date/Time	Updated By	Action	Description
02/15/2015 07:26 PM	System, Concur	Approval Status Change	Status changed from Pending Approval to Approval Time Expired Comment: Purchase Request's approval time expired and it was sent to another ma...
02/05/2015 03:29 PM	Smith, John	Approval Status Change	Status changed from Submitted to Pending Approval Comment:
02/05/2015 03:29 PM	Smith, John	Approval Status Change	Status changed from Not Submitted to Submitted Comment:
<div>Close</div>			

NOTE: All users who have access to a PO change order transaction will be able to view the audit trail history of the PO Change Order.

Select Different Vendors for Project- and Event-Based Requests

When creating their purchase request, users may select a different vendor for *each* item within the overall purchase request. Associating a vendor at the item level adds more detail to the request and, combined with the ability to create project- or event-based requests, makes the process more efficient and budget appropriate.

For example, an office update project may combine goods (pens and pencils) alongside services (cleaning), with different vendors as required.

Cart Items		Clear
+ Add New Item		
Pens and pencils Home Style	50 Each @ 0.5 \$25.00	
Office cleaning Two spaces	1 Unit @ 760.5 \$760.50	
Request		Total: \$785.50

From this single request, multiple purchase orders are generated, each associated with the items contained in the original request. The unique PO number guides the system when an action, such as **Send Back**, requires that all POs be identified with the parent PR being returned to the requestor.

Distribute (Allocate) a Purchase Request

The purchase request user or purchasing admin, who processes purchase requests, can specify distributions at the line item level, so that they can allocate the cost of the purchase accurately. In addition, if they want to apply the same distributions to all line items, they can specify the distributions once and apply it to all line items.

NOTE: The purchase request user, the approver, and the purchasing admin, who processes purchase requests, can create and manage distributions (allocations).

NOTE: Only users with access to the Distribution functionality will see it. Users who need to access the Distribution functionality should contact their client administrator.

Section 3: What the Purchase Request User Can Do

► **Distribute a purchase request:**

1. Open the desired purchase request.
2. On the **Request** page, select one or more itemizations to that you want to distribute between departments.

Items

☒ **Add** **Delete** **Edit** **Distribute ▼** | ☒ Show Distributions

☒ **Banner**
Expense Type: Advertising
Quantity: 1 Each
Unit Price: 100
Total: \$100.00

Sagapo
(Unapproved)
12 Main Street
Seattle, WA 98077

[Hide Comments](#)
Terry L. Brown added a comment - 02/02/2016 03:24 PM
Check vendor.
[Add Comment](#)

Account Code	Distribution Code	Percentage	Net Amount
1000		100	\$100.00

3. Click **Distribute > Distribute Selected Items**.

Items

☒ **Add** **Delete** **Edit** **Distribute ▼** | ☒ Show Distributions

☒ **Banner**
Expense Type: Advertising
Quantity: 1 Each
Unit Price: 100
Total: \$100.00

Sagapo
(Unapproved)
12 Main Street
Seattle, WA 98077

[Hide Comments](#)
Terry L. Brown added a comment - 02/02/2016 03:24 PM
Check vendor.
[Add Comment](#)

Account Code	Distribution Code	Percentage	Net Amount
1000		100	\$100.00

The **Distribute Selected Items** page appears.

Distribute Selected Items

Distributions | **Distribution Summary** | Total: \$100.00 | Distributed: \$100.00 (100%) | Remaining: \$0.00 (0%)

Distribute By ▼ | **Add** **Delete** **Favorites ▼** **Add to Favorites**

<input type="checkbox"/> Amount	Custom 1	Custom 2	Custom 3	Custom 4	Distribution Code
<input type="checkbox"/> 100.00					

Save **Cancel**

4. Click **Distribute By** and select to distribute the allocation by amount or by percentage.

Distribute Selected Items

Distributions | Distribution Summary | Total: \$100.00 | Distributed: \$100.00 (100%) | Remaining: \$0.00 (0%)

Distribute By: **Amount** | Add | Delete | Favorites | Add to Favorites

	Custom 1	Custom 2	Custom 3	Custom 4	Distribution Code

Save | Cancel

5. Click **Add**. The total is now evenly spread between the number of allocations (you may adjust these manually, but the percent must equal 100 or the amount the overall total, excepting tax and shipping before you can proceed).

Distribute Selected Items

Distributions | Distribution Summary | Total: \$100.00 | Distributed: \$100.00 (100%) | Remaining: \$0.00 (0%)

Distribute By: **Amount** | Add | Delete | Favorites | Add to Favorites

	Custom 1	Custom 2	Custom 3	Custom 4	Distribution Code
<input type="checkbox"/> 100.00					
<input type="checkbox"/> 0.00					

Save | Cancel

6. Complete all required fields and the optional fields as directed by your company. (Your company defines the fields that appear on this page.)
7. Click **Save**.

You can add or delete an item by clicking the **Add** or **Delete** button respectively.

Import Distributions

The purchase request user can import their distributions (allocations) by using the Import feature. This feature supports clients who need to distribute a single purchase request across a large number of cost objects. For example, the corporate office may decide one purchase request should be shared by all the 400 company retail locations. Imported distributions can be:

- Specified to import as either percentage or amount, with restrictions based on the sign (negative or positive)
- Applied across multiple line items at once

► To import distributions:

1. Double-click the purchase request that you would like to open.
2. On the **Request** page, in the **Items** section, select the item for which you want to import distributions.

Items

☒ **Add** **Delete** **Edit** **Distribute ▼** | ☒ Show Distributions

☒ **Banner** Quantity: 1 Each Total: \$100.00
Expense Type: Advertising Unit Price: 100

Sagapo
(Unapproved)
12 Main Street
Seattle, WA 98077

[Hide Comments](#)

Terry L. Brown added a comment - 02/02/2016 03:24 PM
Check vendor.

[Add Comment](#)

Account Code	Distribution Code	Percentage	Net Amount
1000		100	\$100.00

3. Click **Distribute**, and then **Import Distributions**.

Items

☒ **Add** **Delete** **Edit** **Distribute ▼** | ☒ Show Distributions

☒ **Banner** Quantity: 1 Each Total: \$100.00
Expense Type: Advertising Unit Price: 100

Sagapo
(Unapproved)
12 Main Street
Seattle, WA 98077

[Hide Comments](#)

Terry L. Brown added a comment - 02/02/2016 03:24 PM
Check vendor.

[Add Comment](#)

Account Code	Distribution Code	Percentage	Net Amount
1000		100	\$100.00

4. In the **Import Distributions** window that appears, click **Browse** to select the file that you want to import. You may download a sample Excel file (.xls) template based off distribution (allocation) configuration fields by clicking **Download Template**.

Import Distributions

Step 1: Download Import Template
Importing distributions for a purchase request requires the use of the proper template. If you already have a template to use, you can proceed and import the distribution file you created. Otherwise, click the 'Download Template' button below.

Step 2: Select File To Import
In order to import distributions, you must locate the Excel file they are saved in. Click the 'Browse...' button below to locate the file. Once the proper file is selected, indicate if you are distributing by percentage or amount, then click the 'Import' button. Importing distributions will replace any existing distributions for the purchase request.

Download Template

Browse...

☒ Distribute By Amount
☐ Distribute By Percentage

Import

Cancel

5. Select the file to import, and then click **Open**.
6. Click **Import**.

Step 2: Select File To Import
In order to import distributions, you must locate the Excel file they are saved in. Click the 'Browse...' button below to locate the file. Once the proper file is selected, indicate if you are distributing by percentage or amount, then click the 'Import' button. Importing distributions will replace any existing distributions for the purchase request.

ImportDistributions.xls Browse...

☒ Distribute By Amount
☐ Distribute By Percentage

Import

Cancel

Concur Invoice imports the distributions and displays them in Concur Invoice.

7. Click **Save**.

NOTE: While Concur Invoice imports the distributions, error checking and validations are processed, and the results appear in the **Import Errors** window.

Create and Manage Allocation Favorites

Users often allocate many expenses in an identical manner. For example, they will allocate 20% of an expense to Cost Center A, and 80% to Cost Center B. The Allocation Favorites feature allows the user to save a group of allocations, to use on other expenses.

When the user applies these allocation favorite "sets" to another expense, the system validates the data in those stored allocation records to ensure any project codes or other list fields are still valid, and alerts the user if the user needs to correct data. The user adds the allocation to the expense, and then the user can edit the allocation just like a manually entered allocation row.

► To create an allocation favorite:

1. Open the desired purchase request.
2. On the **Request** page, in the **Items** section, select the item for which you want to create a favorite allocation.

Items

☒ **Add** **Delete** **Edit** **Distribute ▼** | ☒ Show Distributions

☒ **Banner** Quantity: 1 Each Total: \$100.00
Expense Type: Advertising Unit Price: 100

Sagapo
(Unapproved)
12 Main Street
Seattle, WA 98077

[Hide Comments](#)

Terry L. Brown added a comment - 02/02/2016 03:24 PM
[Check vendor.](#)

[Add Comment](#)

Account Code	Distribution Code	Percentage	Net Amount
1000		100	\$100.00

3. Click **Distribute > Distribute Selected Items**.

Items

☒ **Add** **Delete** **Edit** **Distribute ▼** | ☒ Show Distributions

☒ **Banner** Quantity: 1 Each Total: \$100.00
Expense Type: Advertising Unit Price: 100

Sagapo
(Unapproved)
12 Main Street
Seattle, WA 98077

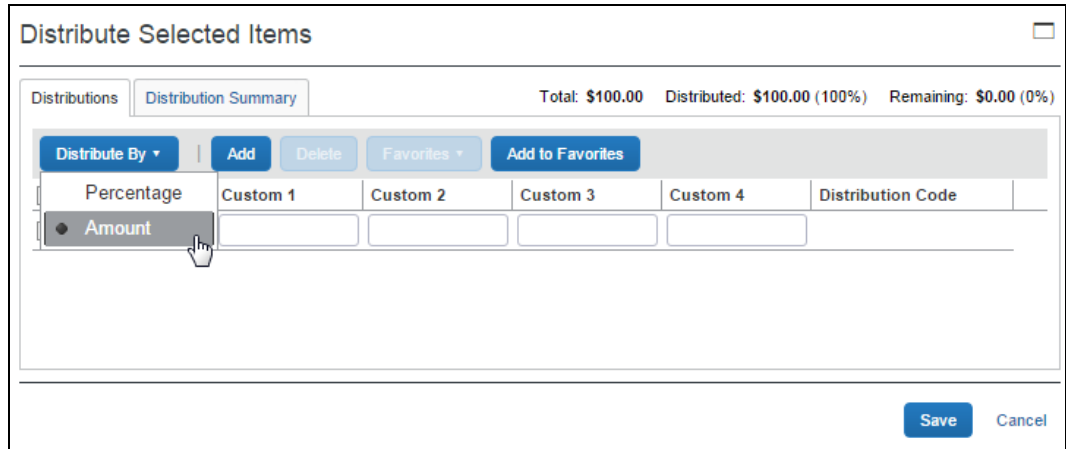
[Hide Comments](#)

Terry L. Brown added a comment - 02/02/2016 03:24 PM
[Check vendor.](#)

[Add Comment](#)

Account Code	Distribution Code	Percentage	Net Amount
1000		100	\$100.00

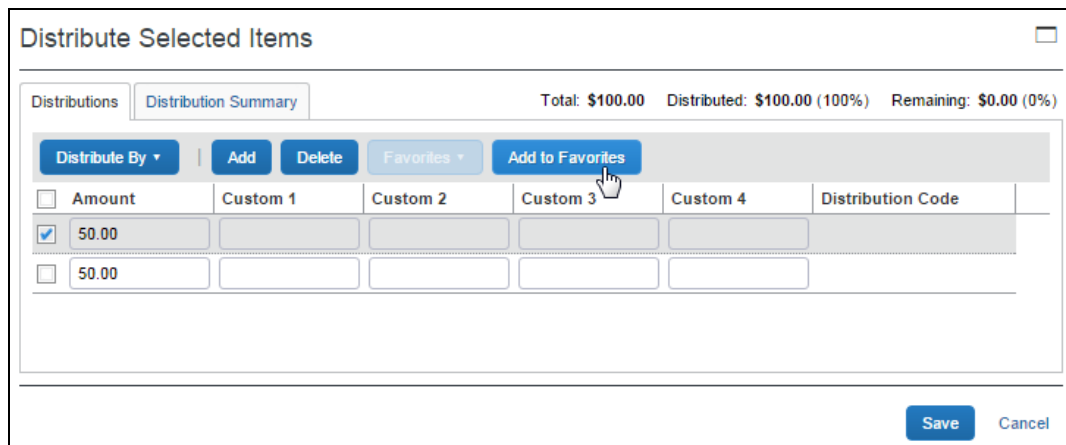
4. In the **Distribute By** menu, select if you would like to distribute the allocation by amount or percentage.



The screenshot shows the 'Distribute Selected Items' window. At the top, there are tabs for 'Distributions' and 'Distribution Summary'. To the right, it displays 'Total: \$100.00', 'Distributed: \$100.00 (100%)', and 'Remaining: \$0.00 (0%)'. Below this is a toolbar with buttons: 'Distribute By' (dropdown), 'Add', 'Delete', 'Favorites' (dropdown), and 'Add to Favorites'. The 'Distribute By' dropdown is open, showing 'Percentage' and 'Amount' (selected). Below the dropdown is a table with columns: 'Custom 1', 'Custom 2', 'Custom 3', 'Custom 4', and 'Distribution Code'. At the bottom right are 'Save' and 'Cancel' buttons.

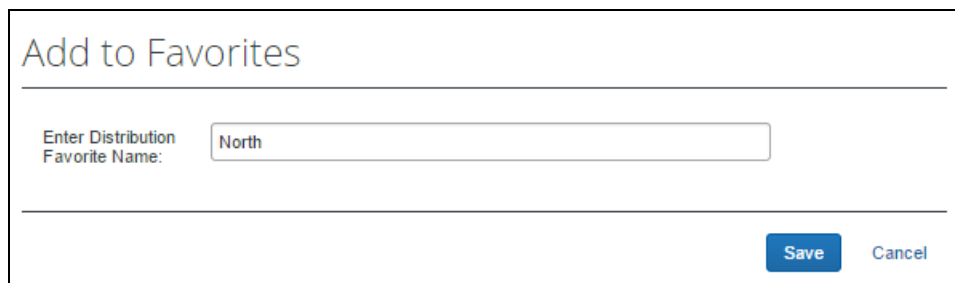
NOTE: You can use the **Add** button to correctly identify and budget the expense to the accounting system. For example, use this if your need to spread your expenses across several projects or departments.

5. Click **Add to Favorites**.



This screenshot is similar to the previous one, but the 'Add to Favorites' button is highlighted with a mouse cursor. The 'Distribute By' dropdown is still open, showing 'Amount' selected. The table below has three rows, each with a checkbox, a value field (the first row has '50.00'), and five empty input fields for 'Custom 1' through 'Custom 4' and a 'Distribution Code' field. The 'Save' and 'Cancel' buttons are at the bottom right.

The **Add to Favorites** window opens.



The 'Add to Favorites' window is shown. It has a title bar 'Add to Favorites'. Below the title bar is a text input field labeled 'Enter Distribution Favorite Name:' with the text 'North' entered. At the bottom right are 'Save' and 'Cancel' buttons.

Section 3: What the Purchase Request User Can Do

6. Enter a name for the allocation favorite and then click **Save**. The system adds the allocation to your favorites, which you can see if you click **Favorites**.

The screenshot shows the 'Distribute Selected Items' window with the 'Distribution Summary' tab selected. At the top, it shows 'Total: \$100.00', 'Distributed: \$100.00 (100%)', and 'Remaining: \$0.00 (0%)'. Below this is a table with columns: 'Amount', 'Custom 1', 'North', 'Custom 3', 'Custom 4', and 'Distribution Code'. The 'Amount' column has a checked checkbox and the value '50.00'. The 'North' column has a red X icon next to it. The 'Custom 1' column has a value of '50.00'. The 'Custom 3' column has a value of '50.00'. The 'Custom 4' column is empty. The 'Distribution Code' column is empty. At the bottom right, there are 'Save' and 'Cancel' buttons.

► **To assign your allocation favorite:**

To assign your allocation favorites, follow the *To create allocation favorite* procedure that is described above. However, instead of clicking **Add to Favorites**, in the **Favorites** menu, select the favorite allocation that you would like to use.

► **To remove an allocation favorite:**

Over time, allocation favorites will become incorrect or obsolete. The user can remove out-of-date allocation favorites by clicking on the red X icon next to the name as shown in the figure below.

► **To edit an allocation favorite:**

The user can update the set by using it on an expense, making needed corrections, and then saving the resulting allocations to the same allocation favorite name. The system will confirm that the user wants to overwrite the existing set.

On the **Distribution Summary** page of the **Distribute Selected Items** window, the user may view a summary of a distribution they made of a particular line item.

MAPPING ACCOUNT CODES TO PURCHASE REQUESTS

Users may view the account code for the expense type that they selected when they created an item, so that they know which account code is going to apply to a specific purchase request. The account code for a purchase request is applicable for the item, but displayed and available at the distribution level. As the account code is derived from the expense type selected for an item, the same account code will be applied across all distributions for that item.

The user will be able to see the **Account Code** column in the following two places:

- In the **Distribution Summary** tab on the **Request Number** page

Distribute Selected Items

Distributions | Distribution Summary

Distribution Summary

Total: 20,000.00\$ | Distributed: 0.00\$ (0%) | Remaining: 20,000.00\$ (100%)

Account Code	Distribution Code	Percentage	Net Amount	Gross Amount
6000 [System Default]		100	20,000.00\$	20,000.00\$

Page 1 of 1 | Displaying 1 - 1 of 1

Cancel Save

- In the **Items** section on the **Request Number** page

Items

Add Delete Edit Distribute Show Distributions

Banner
Expense Type: Advertising
Quantity: 1 Each
Unit Price: 100
Total: \$100.00

Sagapo
(Unapproved)
12 Main Street
Seattle, WA 98077

Show Comments

Account Code	Distribution Code	Percentage	Net Amount
1000		100	\$100.00

Act As a Proxy for a Purchase Request User

A user can be assigned a role that allows them to act on behalf of users assigned the Purchase Request User role. This feature is identical to its implementation in Concur Invoice, and is designed specifically to work *within* Purchase Request, without changing the Purchase Request User role and access right when they exit Purchase Request and begin working within Concur Invoice.

How It Works

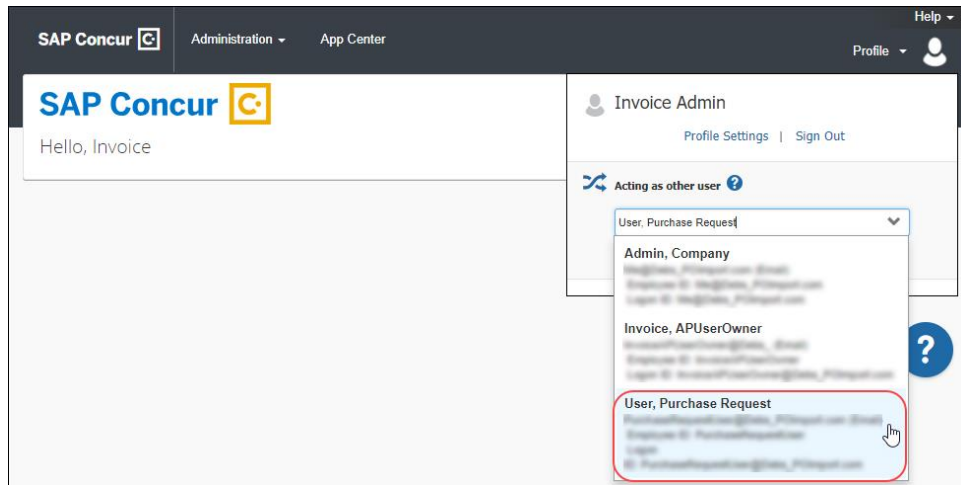
The proxy feature works when the following role relationship is in effect:

- The Invoice Admin role is assigned to the user who will act as a proxy for users with the Purchase Request User role.
- The Purchase Request User role is assigned to the users that the Invoice Admin will act as a proxy for.

With this relationship in place, the Invoice Admin sees a list of users in the **Acting as other user** list in the **Profile** menu and will have the ability to select and act as a proxy for *any* user with the Purchase Request User role.

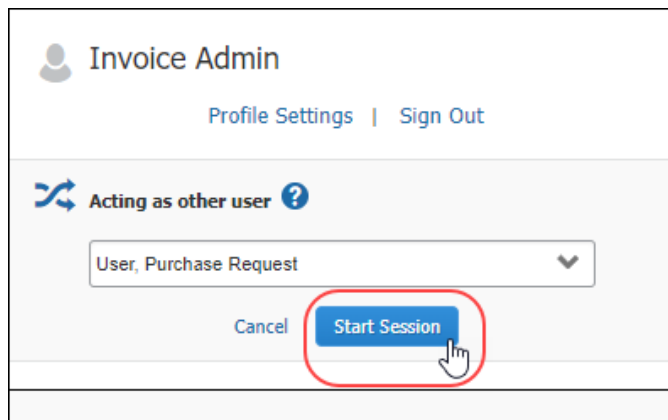
► **To act as a user with the Purchase Request User role:**

1. (Invoice Admin) Click **Profile** and then select the name of the user with the Purchase Request User role from the menu in the **Acting as other user** field.

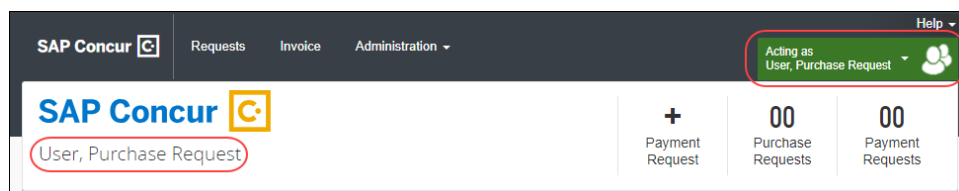


NOTE: If the Invoice Admin has permission to act as users with other roles, those other users will also appear in the menu.

2. Click **Start Session**.



While the Invoice Admin is acting as a proxy for the Purchasing Request User, they will see the Purchase Request User's name below the SAP Concur logo on the left side of the page. In addition, a message that indicates they are acting as the selected user replaces the **Profile** menu heading.



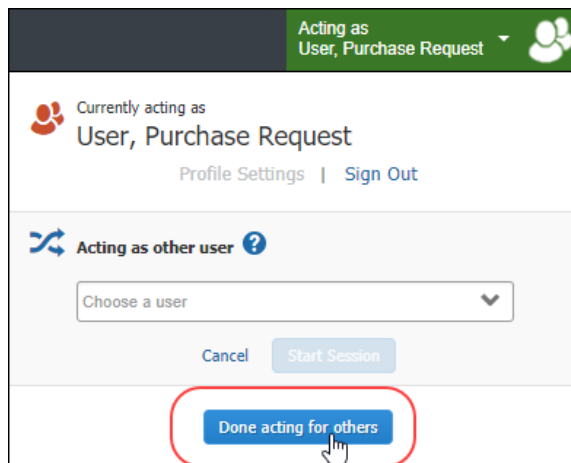
Stop Acting as a Proxy

► To stop acting as a proxy for the Purchase Request User:

1. Click on the message that indicates you are acting as the Purchase Request User.



2. Click **Done acting for others**.

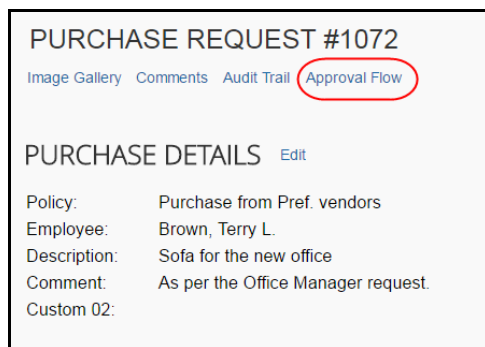


View the Approval Flow

The purchase request user can view the workflow to see all the approval steps that are part of the purchase request process. In addition, it is possible to submit the purchase request from the **Approval Flow for Purchase Request** window.

► To view the approval flow:

1. Open the desired purchase request.
2. On the **Request** page, click **Approval Flow**.



Section 3: What the Purchase Request User Can Do

3. In the **Approval Flow for Purchase Request** window, review the workflow, and then click **Cancel**, or click **Submit** to submit the request.

Approval Flow for Purchase Request: Banner

Manager Approval:

Taylor, Sarah

Cost Object Approval:

Approval for Processing:

Submit

Save Workflow Cancel

View Default Purchase Request Approver

The purchase request user can view the default purchase request approver by going to **Profile > Profile Settings > Invoice Approvers**. For users, the **Invoice Approver** page is a read-only page.

SAP Concur

Requests Invoice Reporting App Center

Profile Personal Information Change Password System Settings

Your Information

Personal Information

Company Information

Contact Information

Email Addresses

Invoice Settings

Invoice Information

Invoice Delegates

Invoice Preferences

Invoice Approvers

Invoice Approvers

Save Cancel

Default approver for your payment requests.

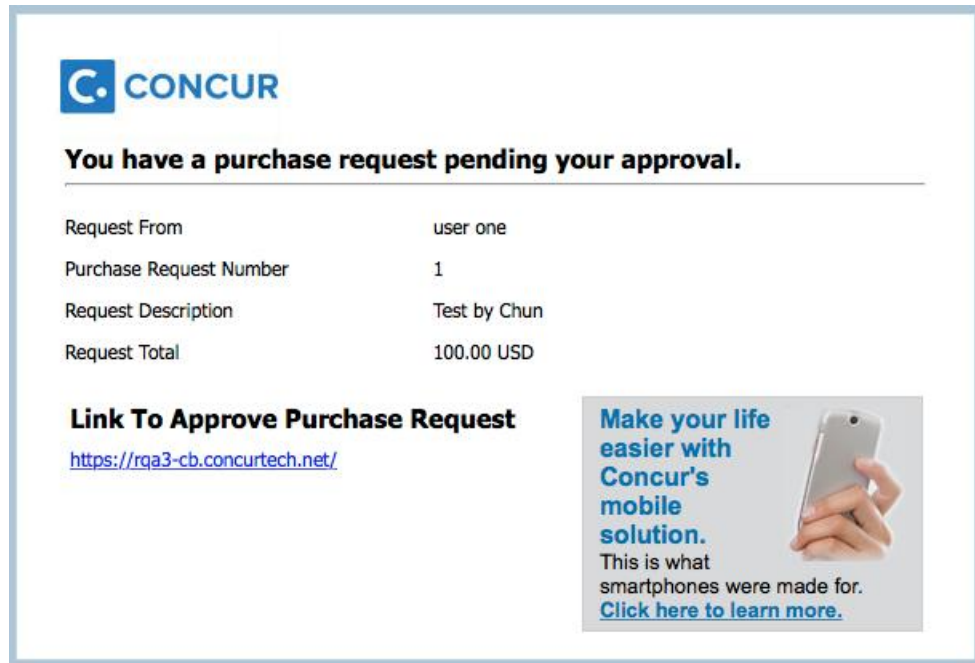
mukund.ravikumar@concur.com - Sarah Taylor

Default approver for your purchase requests.

mukund.ravikumar@concur.com - Sarah Taylor

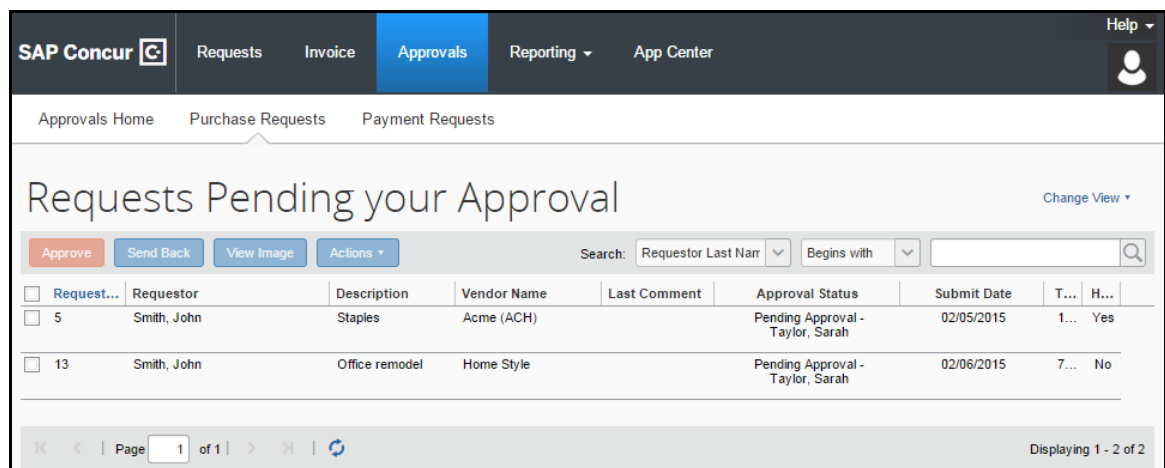
Email Notifications of Status Change and Required Approvals

Clients receive email notifications about status changes or approvals to be done of purchase requests. These notification emails contain a link that will take the client directly to the specific purchase request that has changed or that needs to be approved.



Section 4: What the Purchase Request Approver Can Do

The user who has the Purchase Request Approver role clicks **Approvals > Purchase Requests** to access the request with which they need to work. The **Request Pending your Approval** page and its actions are virtually identical to those in Invoice, including search functionality and a **Change View** option to view by action or approval date range.



Section 4: What the Purchase Request Approver Can Do

Additional options let the approver review the image and either approve, or send the purchase request back to the requestor. The approver is limited in what they can change in the request, and so may elect to send back, or have the purchasing admin adjust as needed.

Search for a Purchase Request

Approvers can search for approved purchase requests or requests that are pending approval in the search area by selecting different search criteria, such as *Requestor Last Name*, *Total*, or *Request No.*

The screenshot shows the 'All Requests' page with a search bar and a table of requests. The search bar has a dropdown menu with options: Requestor Last Name, Request No., Purchase Order No., and Total. The table has columns: Requestor, Description, Purchase Order(s), Vendor Name, Status, Subm..., Total, and Has... The table contains two rows of data.

Requestor	Description	Purchase Order(s)	Vendor Name	Status	Subm...	Total	Has...
1 Smith, John	Laptop		Acme (ACH)	oved	01/29/...	\$1.0...	No
2 Smith, John	Laptop	1	Acme (ACH)	oved	01/29/...	\$99...	No

Change View Search Option

Approvers can also use the **Change View** menu to display requests pending their approval or requests approved by date range. By changing the view, the result appears in the page.

The screenshot shows the 'Change View' dropdown menu with options: Requests Pending your Approval, All Requests, Requests you Approved this Month, Requests you Approved last Month, Requests you Approved this Quarter, and Requests you Approved last Quarter. The 'Requests you Approved this Month' option is highlighted.

Send Back a Purchase Request

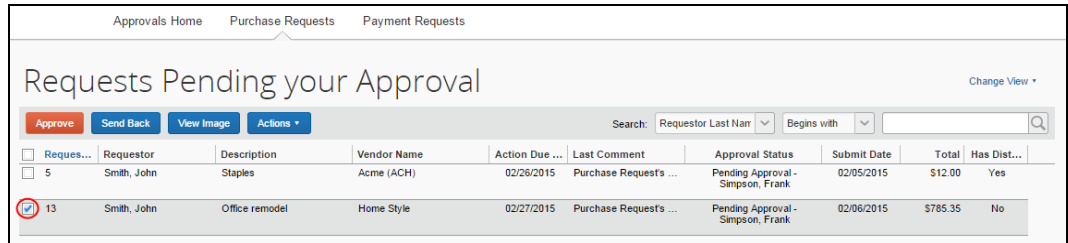
Approvers can send back a purchase request *prior* to transmittal to vendor to remove a purchase request from its workflow for the purpose of additional review, correction of the associated purchase request amount or cost object, or amend some additional items to the PR.

When a **Send Back** action is taken on the PR, the assigned purchase request number is voided, the original associated request item(s) are made read-only, and a new, duplicate PR is created with a status of *Sent Back to Employee* that includes the original items and allocations that were part of the now-retired PR. An indicator is also added to the new PR to show it was generated based on a now-invalid PR.

Finally, an email notification is generated and sent based on the purchase request email notification settings for the requestor.

► **To send back a purchase request:**

1. On the **Requests Pending your Approval** page, select the purchase request you want to send back by clicking its check box.



Approvals Home Purchase Requests Payment Requests

Requests Pending your Approval

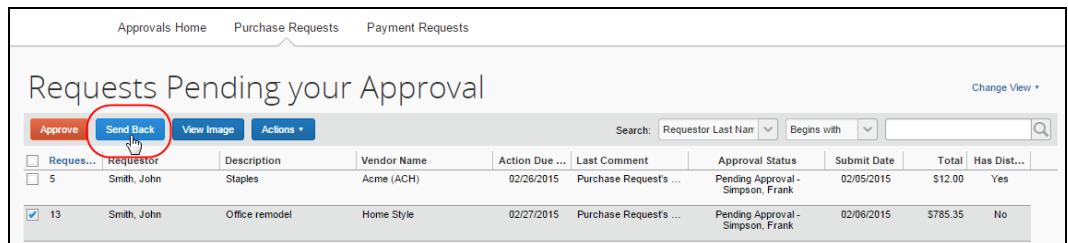
Change View ▾

Approve Send Back View Image Actions +

Search: Requestor Last Name ▾ Begins with ▾

Reques...	Requestor	Description	Vendor Name	Action Due ...	Last Comment	Approval Status	Submit Date	Total	Has Dist...	
<input type="checkbox"/>	5	Smith, John	Staples	Acme (ACH)	02/26/2015	Purchase Request's ...	Pending Approval - Simpson, Frank	02/05/2015	\$12.00	Yes
<input checked="" type="checkbox"/>	13	Smith, John	Office remodel	Home Style	02/27/2015	Purchase Request's ...	Pending Approval - Simpson, Frank	02/06/2015	\$785.35	No

2. Click **Send Back**.



Approvals Home Purchase Requests Payment Requests

Requests Pending your Approval

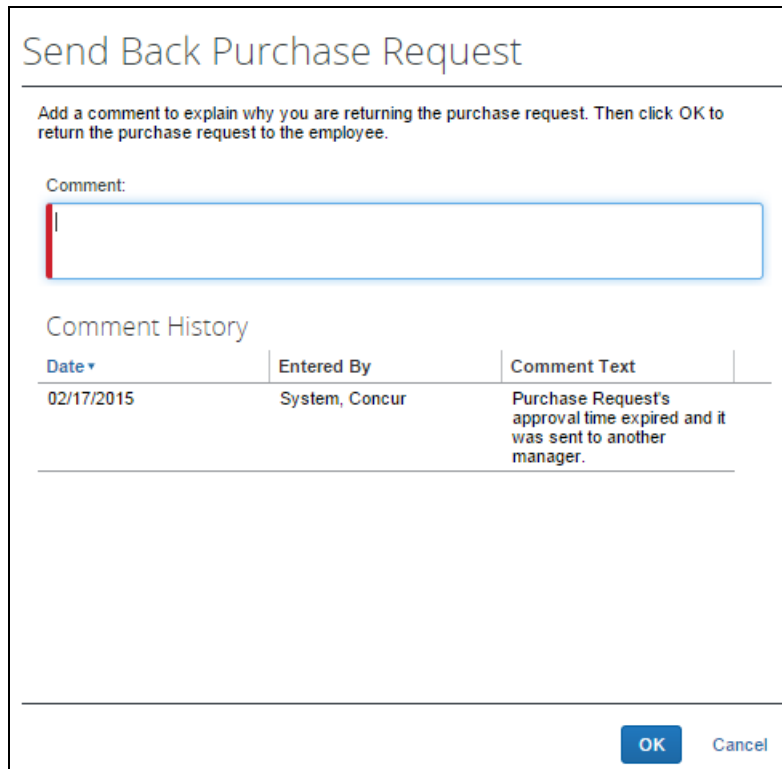
Change View ▾

Approve **Send Back** View Image Actions +

Search: Requestor Last Name ▾ Begins with ▾

Reques...	Requestor	Description	Vendor Name	Action Due ...	Last Comment	Approval Status	Submit Date	Total	Has Dist...	
<input type="checkbox"/>	5	Smith, John	Staples	Acme (ACH)	02/26/2015	Purchase Request's ...	Pending Approval - Simpson, Frank	02/05/2015	\$12.00	Yes
<input checked="" type="checkbox"/>	13	Smith, John	Office remodel	Home Style	02/27/2015	Purchase Request's ...	Pending Approval - Simpson, Frank	02/06/2015	\$785.35	No

3. In the **Send Back Purchase Request** window that appears, enter a comment about why you want to send back the purchase request, and then click **OK**.



Send Back Purchase Request

Add a comment to explain why you are returning the purchase request. Then click OK to return the purchase request to the employee.

Comment:

Comment History

Date ▾	Entered By	Comment Text
02/17/2015	System, Concur	Purchase Request's approval time expired and it was sent to another manager.

OK Cancel

Approve and Forward a Purchase Request


If the approver wants to approve a purchase request but also add another approver, they can do this by opening the desired PR and clicking **Approve & Forward**.

The screenshot shows the Concur Purchase Request interface. At the top, there are navigation tabs: Approvals Home, Requests, Reports, Cash Advances, Purchase Requests, and Payment Requests. Below the tabs, the status is 'Pending Approval - Brown, Terry L.' and the title is 'PURCHASE REQUEST #62'. There are four buttons: 'Actions', 'Approve & Forward' (highlighted with a red circle), 'Approve', and 'Send Back'. Below the title, there are links for 'Image Gallery', 'Comments', 'Audit Trail', and 'Approval Flow'. The 'PURCHASE DETAILS' section shows: Policy: Purchase from Pref. vendors, Employee: Fletcher, Erin N., Description: Banner, Comment: , and Custom 02: . The 'REQUEST ITEMS' section shows a table with one item: Banner, Expense Type: Other, Quantity: 1 Each, Unit Price: 100, Total: \$100.00. The 'Show Distributions' section shows a table with one distribution: Account Code: 19000, Distribution Code: [System Default], Percentage: 100, Net Amount: \$100.00.

In the **Approve & Forward Purchase Request** window that appears, the approver can add another approver and a comment about why they would like to do this. Complete this step by clicking **Approve & Forward**.

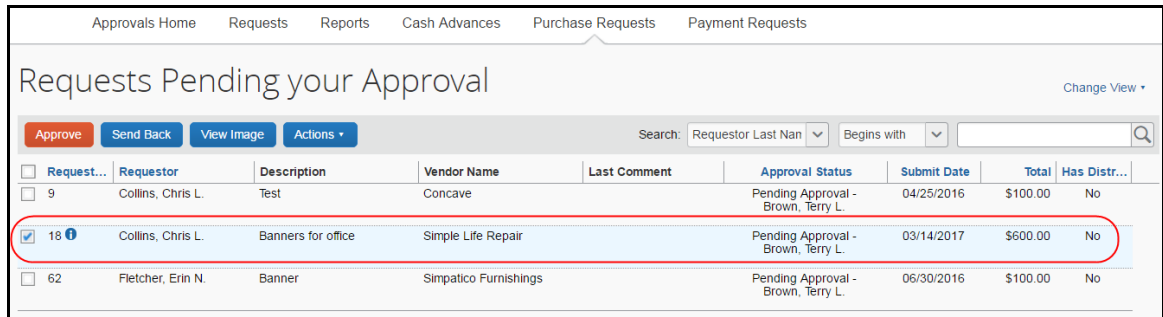
The screenshot shows the 'Approve & Forward Purchase Request: Remodel' window. It has a title bar with the text 'Approve & Forward Purchase Request: Remodel'. Below the title bar, there is a section for 'User-Added Approver:' with a text input field. Below that, there is a section for 'Comment:' with a text area. At the bottom right, there are two buttons: 'Approve & Forward' and 'Cancel'.

Approve a Change Request

When the approver logs in to approve the purchase request, they will see the  icon, which indicates that this is a change request.

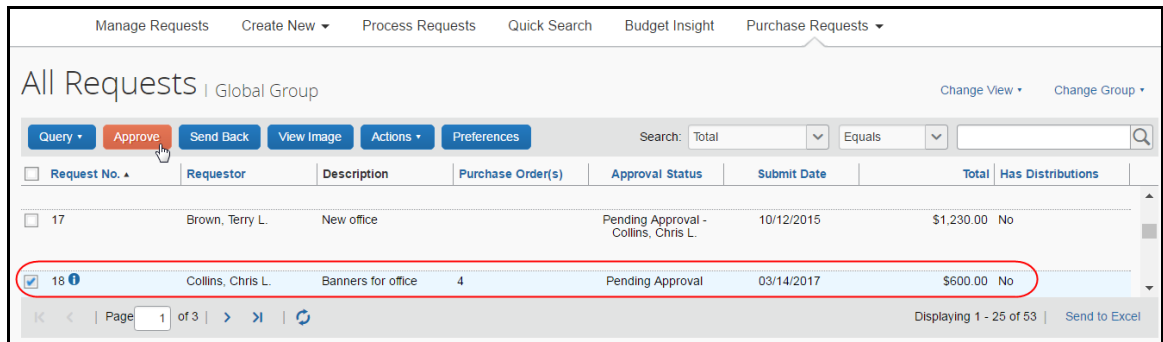
Apart from approving the purchase request, the approver will be able to edit the quantity of the purchase request. In addition, the approver can send the purchase request back to the purchase request user by clicking **Send Back**. The approver should include a send-back reason and the purchase request user is then notified by email that the purchase request is being sent back. Reminders, notifications, and escalations work the same way for change requests as they do for purchase requests.

Section 4: What the Purchase Request Approver Can Do



	Request...	Requestor	Description	Vendor Name	Last Comment	Approval Status	Submit Date	Total	Has Distr...
<input type="checkbox"/>	9	Collins, Chris L.	Test	Concave		Pending Approval - Brown, Terry L.	04/25/2016	\$100.00	No
<input checked="" type="checkbox"/>	18	Collins, Chris L.	Banners for office	Simple Life Repair		Pending Approval - Brown, Terry L.	03/14/2017	\$600.00	No
<input type="checkbox"/>	62	Fletcher, Erin N.	Banner	Simpatico Furnishings		Pending Approval - Brown, Terry L.	06/30/2016	\$100.00	No

Once the approver clicks **Approve**, the purchase request will proceed to the purchase request processor for approval.



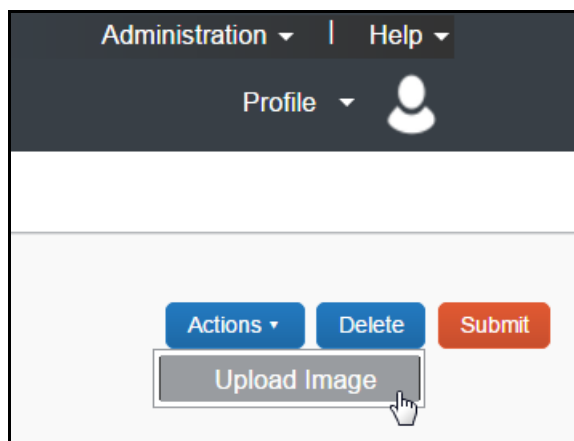
	Request No. ^	Requestor	Description	Purchase Order(s)	Approval Status	Submit Date	Total	Has Distributions
<input type="checkbox"/>	17	Brown, Terry L.	New office		Pending Approval - Collins, Chris L.	10/12/2015	\$1,230.00	No
<input checked="" type="checkbox"/>	18	Collins, Chris L.	Banners for office	4	Pending Approval	03/14/2017	\$600.00	No

Upload and View Images

The approver can upload and view images to the purchase requests. However, approvers cannot delete images.

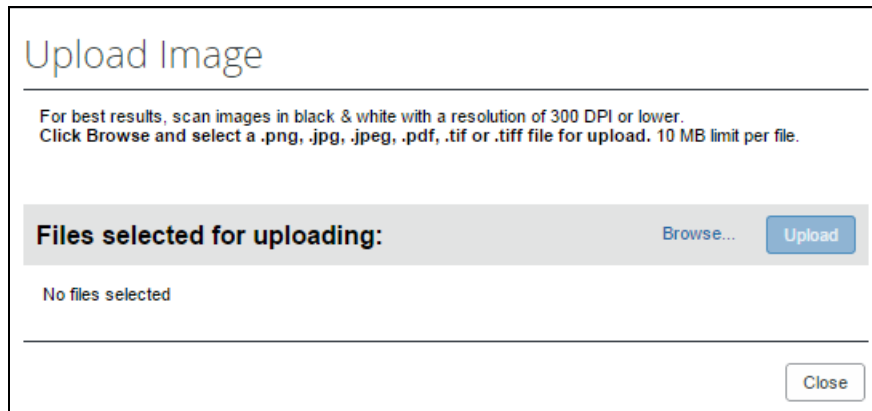
► To upload an image:

1. Open the desired purchase request.
2. On the **Request** page, click **Actions** > **Upload Image**.

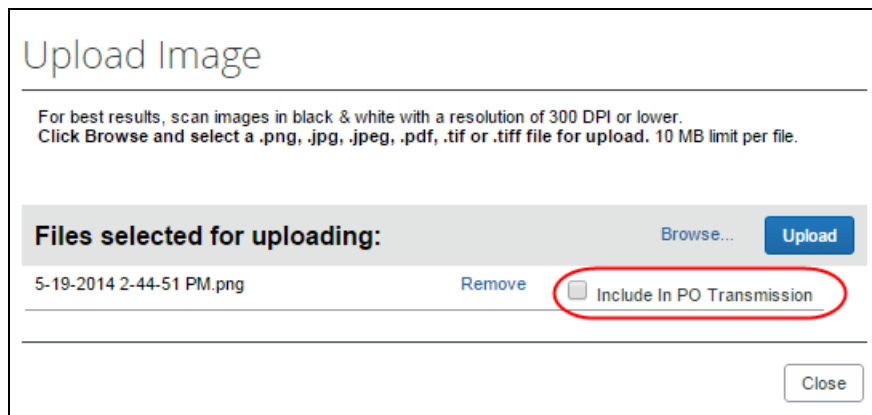


Section 4: What the Purchase Request Approver Can Do

The **Upload Image** window appears.



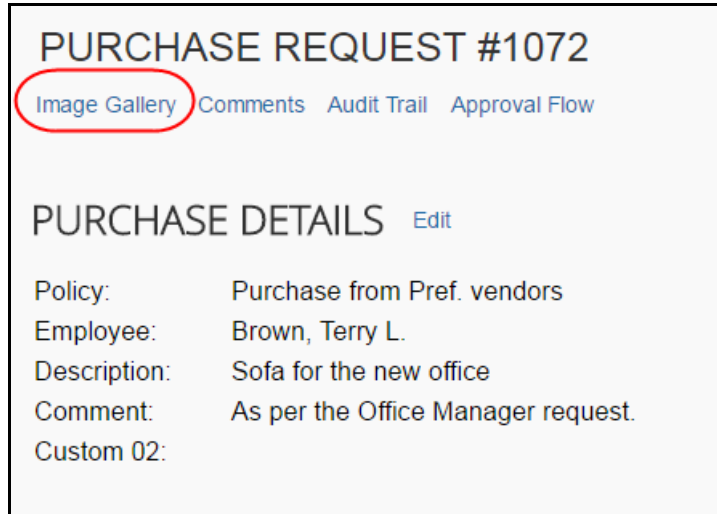
3. Click **Browse** and select the desired image by double-clicking it, or by selecting it and clicking **Open**.
4. (Optional) Select (enable) the **Include in PO Transmission** check box.



5. Click **Upload**.
6. Select the file that you want to upload by double-clicking it or selecting it and clicking **Open**.
7. Click **Close**.

► **To view an image:**

1. Open the desired request.
2. On the **Request** page, click **View Image Gallery**.



PURCHASE REQUEST #1072

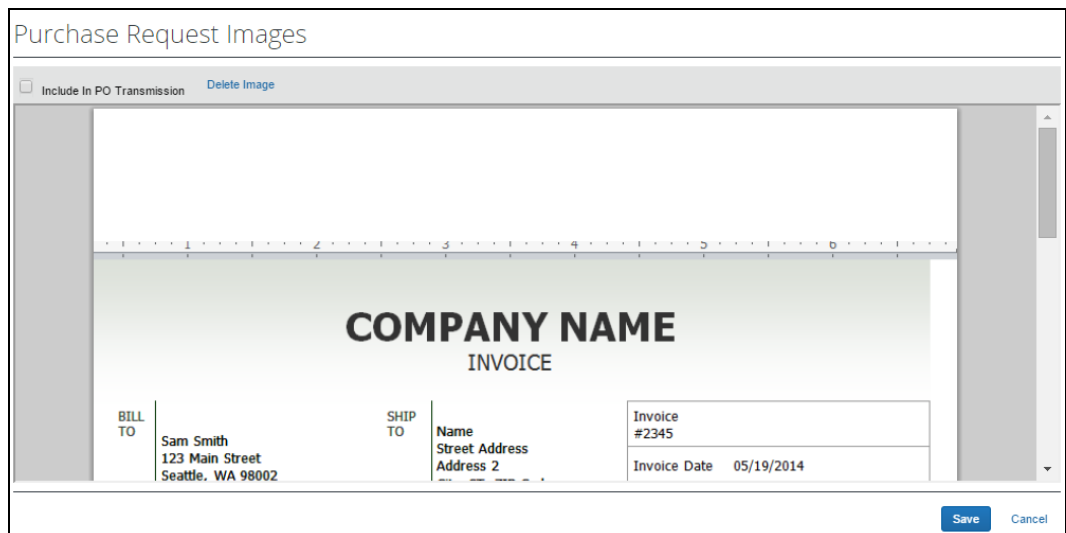
[Image Gallery](#) [Comments](#) [Audit Trail](#) [Approval Flow](#)

PURCHASE DETAILS [Edit](#)

Policy: Purchase from Pref. vendors
 Employee: Brown, Terry L.
 Description: Sofa for the new office
 Comment: As per the Office Manager request.
 Custom 02:

The **Purchase Request Images** window appears. If there are more than one image or supporting document, you can toggle between them by using the **Next** and **Previous** buttons.

NOTE: You can also include supporting documents in the PO transmission from the **Purchase Request Images** window by selecting (enabling) the **Include in PO Transmission** check box.



Purchase Request Images

☐ Include In PO Transmission [Delete Image](#)

COMPANY NAME
INVOICE

BILL TO	Sam Smith 123 Main Street Seattle, WA 98002	SHIP TO	Name Street Address Address 2	Invoice #2345
				Invoice Date 05/19/2014

[Save](#) [Cancel](#)

3. Click **Save** or **Cancel** when you are done.

View Comments

The approver can view comments about the purchase request that the purchase request user has entered in the **Details** section of the purchase request or that the approver has entered when they have sent back a purchase request to the user.

► **To view comments:**

1. Open the desired purchase request.
2. If comments have been added at the header level of the purchase request, an icon displays next to the **Comments** link. Click **Comments** to review the comments.



3. In the **Comment History** window that appears, view the comments about the purchase request.

Comment History		
Date ▼	Entered By	Comment Text
05/09/2019	Admin, Company	Ordered for the conference.

4. Click **Close**.

View the Audit Trail

To review the audit trail, open the purchase request, and then click **Audit Trail**.

PURCHASE REQUEST #1072

Image Gallery

Comments

Audit Trail

Approval Flow

PURCHASE DETAILS

Edit

Policy:

Purchase from Pref. vendors

Employee:

Brown, Terry L.

Description:

Sofa for the new office

Comment:

As per the Office Manager request.

Custom 02:

Section 4: What the Purchase Request Approver Can Do

The **Audit Trail** window appears with information about actions that the approver and the system have taken on the specific purchase request.

Audit Trail			
Date/Time	Updated By	Action	Description
02/15/2015 07:26 PM	System, Concur	Approval Status Change	Status changed from Pending Approval to Approv... Comment: Purchase Request's approval time ex...
02/05/2015 03:29 PM	Smith, John	Approval Status Change	Status changed from Submitted to Pending Appro... Comment:
02/05/2015 03:29 PM	Smith, John	Approval Status Change	Status changed from Not Submitted to Submitted Comment:
<div>Close</div>			

NOTE: All users who have access to a PO change order transaction will be able to view the audit trail history of the PO Change Order.

View the Approval Flow

The approver can view the workflow to see all the approval steps that are part of the purchase request process. In addition, they can approve or send back the purchase request in the **Approval Flow for Purchase Request** window.

► **To view the approval flow:**

1. Open the desired purchase request.
2. On the **Request** page, click **Approval Flow**.

PURCHASE REQUEST #1072

[Image Gallery](#) [Comments](#) [Audit Trail](#) [Approval Flow](#)

PURCHASE DETAILS

Edit

Policy:

Purchase from Pref. vendors

Employee:

Brown, Terry L.

Description:

Sofa for the new office

Comment:

As per the Office Manager request.

Custom 02:

3. In the **Approval Flow for Purchase Request** window, review the workflow, and click **Cancel**, or click **Approve** or **Send Back** to approve or send back the purchase request.

Approval Flow for Purchase Request: Staple

Manager Approval:

System, Concur

for Taylor, Sarah (02/15/2015 Approval Time Expired)

→ Manager Approval:

Simpson, Frank

Manager Approval:

Simpson, Frank

Approval for Processing:

Approve Send Back

Save Workflow Cancel

Add a Comment to an Item

Approvers can add comments to an item to make a clarification about an item, or to provide more information.

► To add a comment to an item:

1. Open the desired purchase request.
2. In the **Items** section, click **Show Comments**.

REQUEST ITEMS

Add Delete Edit Distribute Show Distributions

Logo Travel Mugs

Expense Type: Marketing

Quantity: 2 Case

Unit Price: 80

Total: \$160.00

Vendor:

123 Main ST

Anytown, WA 55555

View Details

Show Comments

Section 4: What the Purchase Request Approver Can Do

- Click the **Add Comment** link that appears.

REQUEST ITEMS

☐ Add | ☒ Show Distributions

☐ **Logo Travel Mugs** Quantity: 2 Case Total: \$160.00
Expense Type: Marketing Unit Price: 80
Vendor: 123 Main ST
Anytown, WA 55555
[View Details](#)
[Hide Comments](#)
[Add Comment](#)

- In the comments field, type the comment, and then click **Save**.

REQUEST ITEMS

☐ Add | ☒ Show Distributions

☐ **Logo Travel Mugs** Quantity: 2 Case Total: \$160.00
Expense Type: Marketing Unit Price: 80
Vendor: 123 Main ST
Anytown, WA 55555
[View Details](#)
[Hide Comments](#)

The comment appears in the **Request Items** section.

REQUEST ITEMS

☒ Add | ☒ Show Distributions

☒ **Logo Travel Mugs** Quantity: 2 Case Total: \$160.00
Expense Type: Marketing Unit Price: 80
Vendor: 123 Main ST
Anytown, WA 55555
[View Details](#)
[Hide Comments](#)

Company Admin added a comment - 05/09/2019 02:49 PM
Check logo art before submitting and after receiving.

[Add Comment](#)

If comments have been added but are hidden, an icon is displayed next to the **Show Comments** link.

REQUEST ITEMS

☐ Add | ☒ Show Distributions

☐ **Logo Travel Mugs** Quantity: 2 Case Total: \$160.00
Expense Type: Marketing Unit Price: 80
Vendor: 123 Main ST
Anytown, WA 55555
[View Details](#)
[Show Comments](#)

Account Code	Distribution Code	Percentage	Net Amount
Mkt	[System Default]	100	\$160.00

Has Comments

View Purchase Order Contact and Email Address

The purchase request approver will see the contact name and email address of the purchase order contact in the **Vendor** field of the **Request Items** section of the opened purchase request in edit mode, provided this information has been imported into Invoice. This makes it easy to quickly find the relevant contact person of the purchase order.

The screenshot shows the 'PURCHASE REQUEST #1023' in edit mode. The 'REQUEST ITEMS' section has a 'Vendor' field that is highlighted with a red circle. The vendor information displayed is: Acme (ACH), 1102 15th Street SW Suite 102, Auburn, WA 98001-6509, Acme, Bill, and Bill@acme.com.

Section 5: What the Purchasing Admin Can Do

The user who has the purchasing admin role can process both purchase requests and purchase orders. This section talks about how to process purchase requests and purchase orders.

Process Purchase Requests

The purchasing admin typically reviews a PR for *completeness*. This means reviewing that required field types are completed, exceptions are cleared, and other details to ensure the requestor has properly filled out the request.

The purchasing admin clicks **Requests > Process Purchase Requests**. Here, the purchasing admin can review purchase requests pending all approvers and perform processing tasks on the purchase request.

The screenshot shows the 'Requests Pending Processor Review' page in SAP Concur. The page has a search bar and a table with the following columns: Request No., Requestor, Description, Purchase Order(s), Approval Status, Submit Date, Total, and Has Distributions. The table is currently empty, displaying 'No purchase requests found.'

NOTE: The default view showing all requests pending processing appears for new clients only.

Section 5: What the Purchasing Admin Can Do

When opened, all functionality available to the original purchase requestor is available to the purchasing admin, plus additional actions such as the following:

- Approve the PR
- Send the request back to the requestor for corrections
- View the associated image(s) for the PR
- Clear exceptions on the selected PR
- Create queries to search for requests

Send Back a Purchase Request

Purchasing admins can send back a purchase request *prior* to transmittal to vendor to remove a purchase request from its workflow for the purpose of additional review, correction of the associated purchase request amount or cost object, or amend some additional items to the PR.

When a **Send Back** action is taken on the PR, the assigned purchase request number is voided, the original associated request item(s) are made read-only, and a new, duplicate PR is created with a status of *Sent Back to Employee* that includes the original items and allocations that were part of the now-retired PR. An indicator is also added to the new PR to show it was generated based on a now-invalid PR.

Finally, an email notification is generated and sent based on the purchase request email notification settings for the requestor. The image below shows a sample email body text:

At least one item from an approved Purchase Request has been sent back. A new Purchase Request containing the item(s) has been created on your behalf.

Original Request: <original request number>

Original Request Description: <original description>

New Request: <new request number>

► ***To send back a purchase request:***

1. On the **Requests Pending Processor Review** page, select the purchase request you want to send back by clicking its check box.

Process Purchase Requests

Process Purchase Orders

Requests Pending Processor Review | Global Group

Approve

Send Back

View Image

Actions ▾

Preferences

Search:

Request No. ▾

Equals ▾

🔍

<input checked="" type="checkbox"/> Request No. ▴	Requestor	Description	Purchase Order(s)	Approval Status	Submit Date	Total	Has Distributions
<input checked="" type="checkbox"/> 21	Taylor, Sarah	Laptop		Pending Processor...	02/17/2015	\$899.00	No

2. Click **Send Back**.

Process Purchase Requests | Process Purchase Orders

Requests Pending Processor Review | Global Group

Change View ▾

Approve **Send Back** View Image Actions ▾ Preferences

Search: Request No. ▾ Equals ▾

<input checked="" type="checkbox"/>	Request No. ▾	Requestor	Description	Purchase Order(s)	Approval Status	Submit Date	Total	Has Distributions
<input checked="" type="checkbox"/>	21	Taylor, Sarah	Laptop		Pending Processor...	02/17/2015	\$899.00	No

3. In the **Send Back Purchase Request** window that appears, enter a comment about why you want to send back the purchase request, and then click **OK**.

Send Back Purchase Request

Add a comment to explain why you are returning the purchase request. Then click OK to return the purchase request to the employee.

Comment:

Comment History

Date ▾	Entered By	Comment Text
02/17/2015	Simpson, Frank	Currency is 1?

OK Cancel

Search for a Purchase Request

Purchasing admins can search for purchase requests pending processor review in the search area by selecting different search criteria, such as *Requestor Last Name*, *Total*, or *Vendor Name*.

Process Purchase Requests | Process Purchase Orders

Requests Pending Processor Review | Global Group

Change View ▾

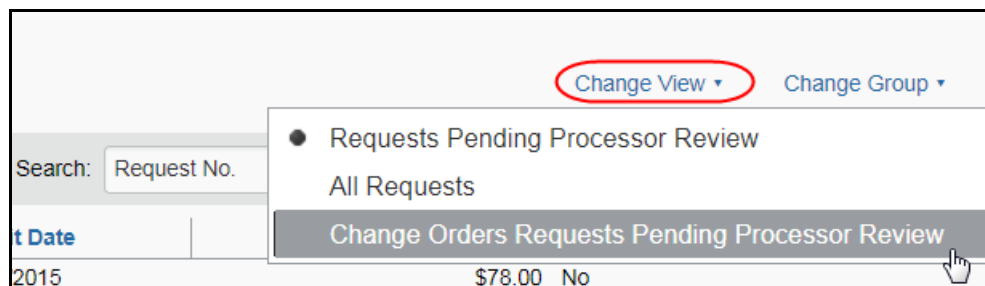
Approve Send Back View Image Actions ▾ Preferences

Search: Request No. ▾ Equals ▾

<input type="checkbox"/>	Request No. ▾	Requestor	Description	Purchase Order(s)	Approval Status	Submit Date	Total	Has Distributions
<input type="checkbox"/>	21	Taylor, Sarah	Laptop		Pending Processor...		\$899.00	No

Change View Search Option

Purchasing admins can also use the **Change View** menu to display requests pending processor review, all requests, or change order requests pending processor review. By changing the view, the result appears on the **Requests Pending Processor Review** page, the **All Requests** page, or the **Change Orders Requests Pending Processor Review**.



Use a Query to Search for a Purchase Request

You can also search for a request by using standard queries or those you create yourself using options within the **Query** section of PR Processor. The query can be created by clicking **New Query** where you can build a customized, condition-based query to return your requests, or you can select an existing query that you have created.

CREATE A CUSTOM QUERY

You can create a new query for your personal use on the **Processor Query** page. Queries you create are your own and cannot be viewed, edited, deleted, or used by anyone else. This means that all newly created queries cannot be shared across processors.

► **To create a new query:**

1. Click **Query > New Query**.
2. In the **Query Builder** window, build the conditions for the query.

3. Click:
 - ◆ **Save & Run:** Saves the query in the **Query** menu, and runs it immediately, returning the results.
 - ◆ **Save:** Saves the query for use in the **Query** menu.

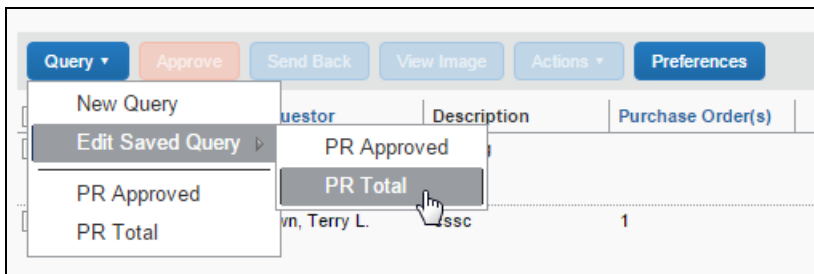


EDIT A SAVED QUERY

You are allowed to edit only those custom queries you have created, and no other user-created custom queries are available for edit, only your own.

► **To edit your custom queries:**

1. Click **Queries** > **Edit Saved Query** and point to the query you wish to edit.



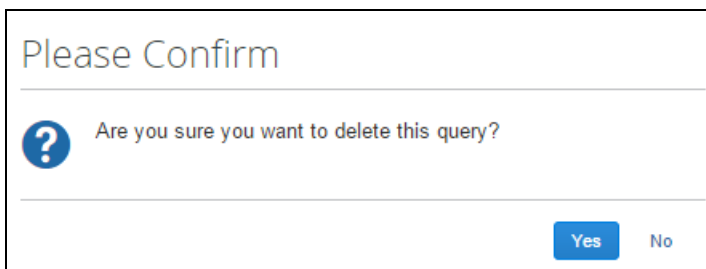
2. Click the query in the list to open it in the **Query Builder** window. Refer to *Create a Custom Query* in this document to edit your query.
3. When done click:
 - ◆ **Save & Run:** Saves the query in the **Query** menu, and runs it immediately, returning the results.
 - ◆ **Save:** Saves the query for use in the **Query** menu.

DELETE A QUERY

You are allowed to delete only those custom queries that you have created. You cannot delete others user-created custom queries.

► **To delete your custom query:**

1. Click **Queries** > **Edit Saved Query** and point to the query you wish to delete.
2. Click the query in the list to open it in the **Query Builder** window.
3. Click **Delete**.
4. In the **Please Confirm** window that appears prompting you to confirm your action of deleting the query, click **Yes**.

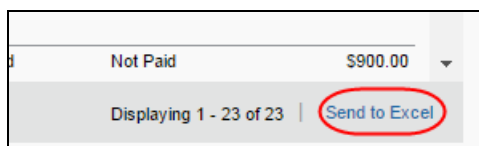


EXPORT QUERY RESULTS

You can export your query results into an Excel-based data template. This allows you to open Excel and load the results of your query for use in application.

► **To export the results of your query:**

1. Run the query for the results you are seeking.
2. Click **Send to Excel** in the lower-right corner of the page.

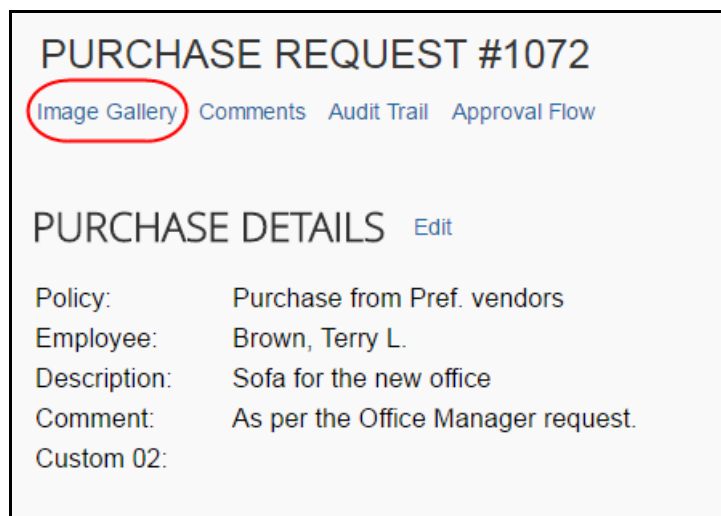


The data is loaded and automatically appears in Excel with each column representing a field within the purchase request.

	A	B	C	D	E	F
1	Purchase Request Key	Employee Name	Description	PO Number	Approval Status	Submit Date
2	31	Brown, Terry L.	PC Docks		Pending Processor Review	2015-10-05 16:43:39.187

View Associated Images to a Purchase Request

To view associated images to the purchase request, click **Image Gallery**.



Purchase Order Contact and Email Address

The purchase request processor can see the contact name and email address of the purchase order contact in the **Vendor** field of the **Request Items** section of the opened purchase request in edit mode, provided this information has been imported into Concur Invoice. This makes it easy to quickly find the relevant contact person of the purchase order.

The screenshot shows the 'Request Items' section of a purchase request. On the left, under 'PURCHASE DETAILS', the following information is displayed: Policy: Barnes IC, Employee: Administrator, Concur, Description: Paint, and Comment: (empty). In the center, under 'REQUEST ITEMS', the Policy is set to 'Barnes IC' and the Type is 'Goods'. On the right, the 'Vendor' field is expanded, showing 'Acme (ACH)' with the address '1102 15th Street SW Suite 102, Auburn, WA 98001-6509'. Below the address, the contact information 'Acme, Bill' and 'Bill@acme.com' is listed, with the email address circled in red.

Clear Exceptions for a Purchase Request

To clear exceptions for a purchase request, read the exception message in the **Exceptions** section of the purchase request that you have opened and take the actions necessary to resolve the exception(s).

The screenshot shows the 'Exceptions' section of a purchase request. At the top, a red circle highlights the 'Exceptions (1)' header. Below it, a message states: 'This request has been pending approval longer than allowed by policy. The request owner should contact their Approver for instructions before resubmitting. If you are not the owner but have been forwarded the request, follow the approval steps according to your policy - this may involve approving the request or assigning it to another Approver for further review.' On the left, under 'Details', the following information is displayed: Policy Name: Default Invoice Po Policy, Employee Name: Smith, John, Description: Staples, Comment: (empty), Cost Center: Marketing, and Project: Promotions. On the right, under 'Items', a table shows one item: 'Staples' with a quantity of 1 Each and a total of \$12.00. The vendor information 'Acme (ACH)' and address are also listed. At the bottom right, the total amount is shown as 'Total: \$12.00'.

Approve a Purchase Request

To approve a purchase request, simply select the request and then click **Approve**.

Approvals Home

Purchase Requests

Payment Requests

Requests Pending your Approval

Change View

Approve

Send Back

View Image

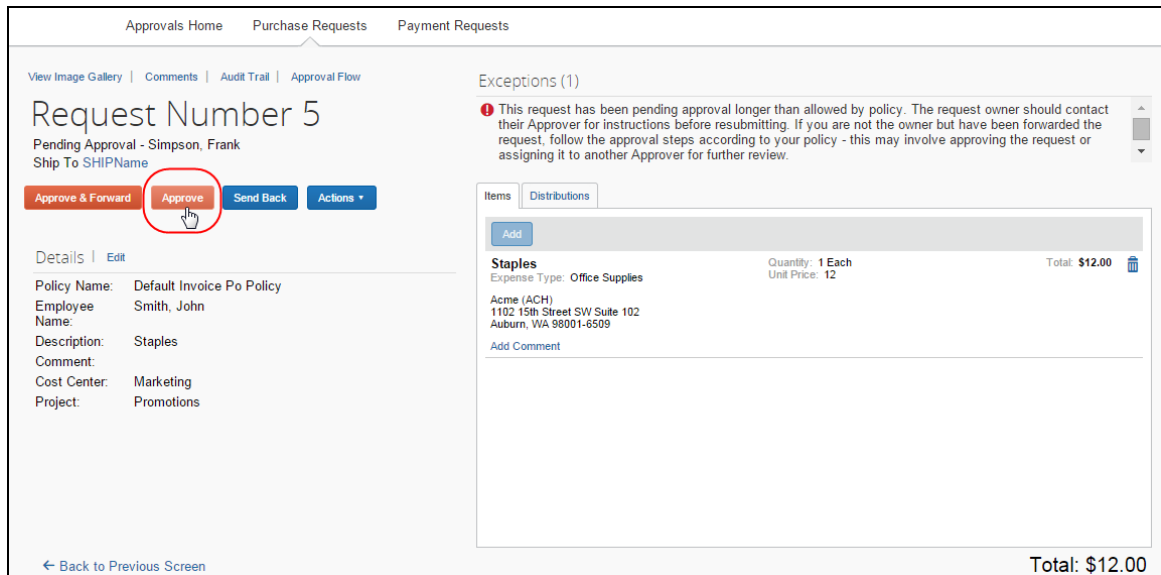
Actions

Search: Requestor Last Name Begins with

	Requestor	Description	Vendor Name	Action Due ...	Last Comment	Approval Status	Submit Date	Total	Has Dist...	
<input checked="" type="checkbox"/>	5	Smith, John	Staples	Acme (ACH)	02/26/2015	Purchase Request's ...	Pending Approval - Simpson, Frank	02/05/2015	\$12.00	Yes
<input type="checkbox"/>	13	Smith, John	Office remodel	Home Style	02/27/2015	Purchase Request's ...	Pending Approval - Simpson, Frank	02/06/2015	\$785.35	No

If you need to review the details of the purchase request, you may first open the request by double-clicking it.

Ensure that you clear any exceptions before you approve the purchase request.



Request Number 5
Pending Approval - Simpson, Frank
Ship To SHIPName

Approve & Forward **Approve** **Send Back** **Actions**

Details | [Edit](#)

Policy Name: Default Invoice Po Policy
Employee Name: Smith, John
Description: Staples
Comment:
Cost Center: Marketing
Project: Promotions

Exceptions (1)
This request has been pending approval longer than allowed by policy. The request owner should contact their Approver for instructions before resubmitting. If you are not the owner but have been forwarded the request, follow the approval steps according to your policy - this may involve approving the request or assigning it to another Approver for further review.

Items | **Distributions**

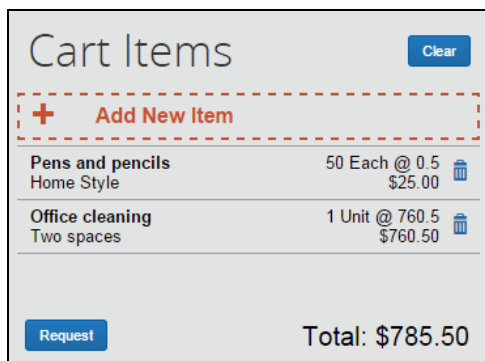
Staples
Expense Type: Office Supplies
Quantity: 1 Each
Unit Price: 12
Total: \$12.00

Acme (ACH)
1102 15th Street SW Suite 102
Auburn, WA 98001-6509

[Add Comment](#)

← Back to Previous Screen Total: \$12.00

Following approval, the system turns the purchase request into one or more purchase orders, each PO generated from an item that makes up the parent request. For the PR shown in the figure below, the system creates two POs, which will go to two different vendors:



Cart Items [Clear](#)

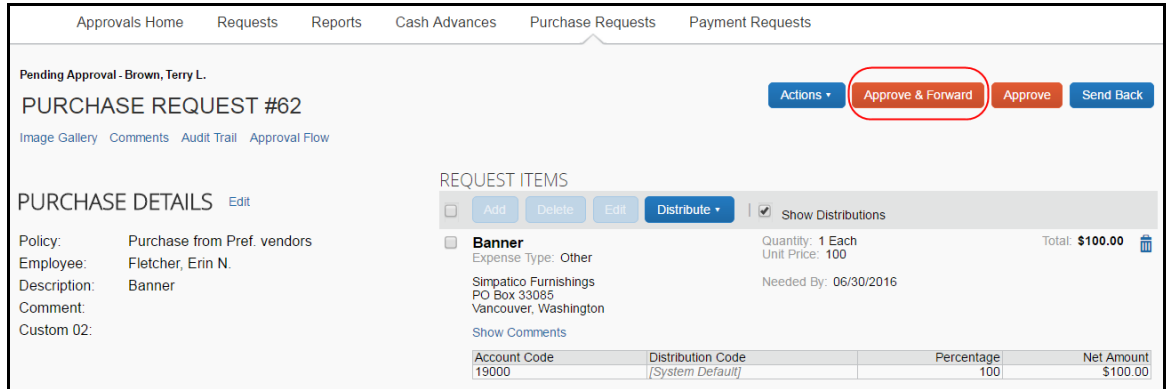
+ Add New Item

Pens and pencils Home Style	50 Each @ 0.5 \$25.00	
Office cleaning Two spaces	1 Unit @ 760.5 \$760.50	

Request **Total: \$785.50**

Approve and Forward a Purchase Request

If the purchasing admin wants to approve the purchase request but also add another approver, they can do this by opening the desired PR and clicking **Approve & Forward**.



Pending Approval - Brown, Terry L.

PURCHASE REQUEST #62

Actions • **Approve & Forward** Approve Send Back

Image Gallery Comments Audit Trail Approval Flow

PURCHASE DETAILS Edit

Policy: Purchase from Pref. vendors
 Employee: Fletcher, Erin N.
 Description: Banner
 Comment:
 Custom 02:

REQUEST ITEMS

☐ Add ☒ Show Distributions

☐ **Banner**
 Expense Type: Other
 Quantity: 1 Each
 Unit Price: 100
 Total: \$100.00
 Simpatco Furnishings
 PO Box 33085
 Vancouver, Washington
 Needed By: 06/30/2016

Show Comments

Account Code	Distribution Code	Percentage	Net Amount
19000	[System Default]	100	\$100.00

In the **Approve & Forward Purchase Request** window that appears, the purchasing admin can add another approver and a comment about why they would like to do this. Complete this step by clicking **Approve & Forward**.



Approve & Forward Purchase Request:
Remodel

User-Added Approver:

Comment:

Approve a Change Request

Once the approver has approved the change request, the request will proceed to the purchase request processor for approval. The approver will see a **i** icon, which indicates that this is a change request.

► To approve a change request:

1. Open the desired purchase request.
2. On the **Request** page, select the change request to approve and then click **Approve**.

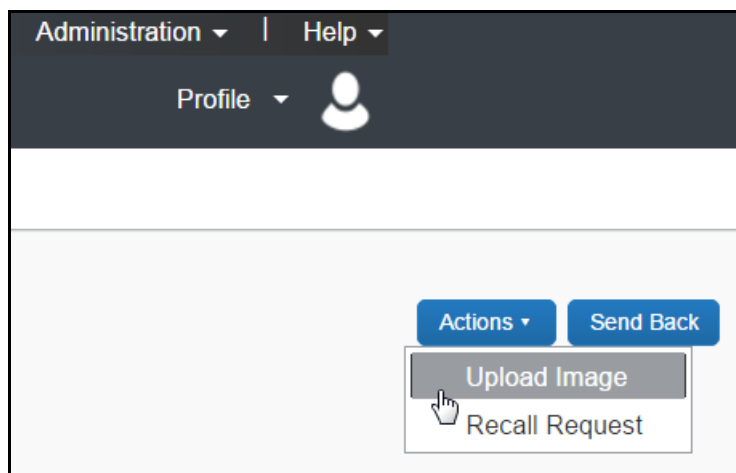
Request No.	Requestor	Description	Purchase Order(s)	Approval Status	Submit Date	Total	Has Distributions
17	Brown, Terry L.	New office		Pending Approval - Collins, Chris L.	10/12/2015	\$1,230.00	No
18 i	Collins, Chris L.	Banners for office	4	Pending Approval	03/14/2017	\$600.00	No

Upload, View, and Delete Images

The purchasing admin, who processes purchase requests, can upload, view, and delete images to the purchase requests.

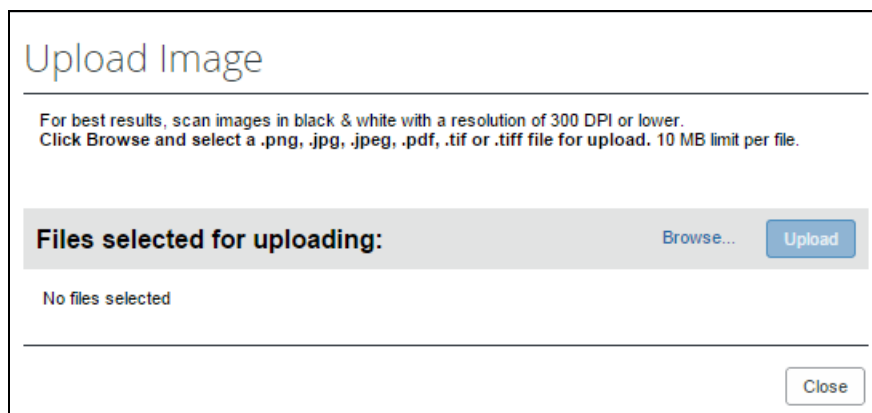
► To upload an image:

1. Open the desired purchase request.
2. On the **Request** page, click **Actions** > **Upload Image**.




Section 5: What the Purchasing Admin Can Do

The **Upload Image** window appears.



3. Click **Browse** and select the desired image by double-clicking it, or by selecting it and clicking **Open**.
4. (Optional) Select (enable) the **Include in PO Transmission** check box.



5. Click **Upload**.
6. Click **Close**.

► **To view an image:**

1. On the **Request** page, click **Image Gallery**.

PURCHASE REQUEST #1072

[Image Gallery](#)
[Comments](#)
[Audit Trail](#)
[Approval Flow](#)

PURCHASE DETAILS [Edit](#)

Policy:	Purchase from Pref. vendors
Employee:	Brown, Terry L.
Description:	Sofa for the new office
Comment:	As per the Office Manager request.
Custom 02:	

The **Purchase Request Images** window appears. If there are more than one image or supporting document, you can toggle between them by using the **Next** and **Previous** buttons.

NOTE: You can also include supporting documents in the PO transmission from the **Purchase Request Images** window by selecting (enabling) the **Include in PO Transmission** check box.

Purchase Request Images

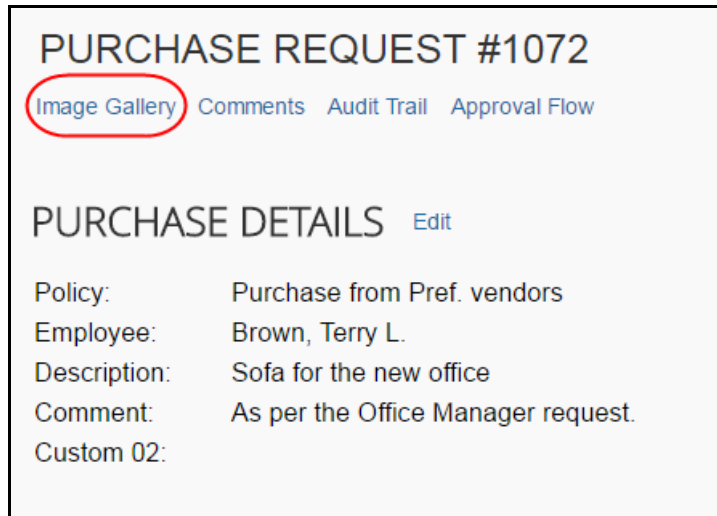
☐ Include In PO Transmission
 [Delete Image](#)

[Save](#)
[Cancel](#)

2. Click **Save** or **Cancel** when you are done.

► **To delete an image:**

1. On the **Request** page, click **Image Gallery**.



The **Purchase Request Images** window appears.

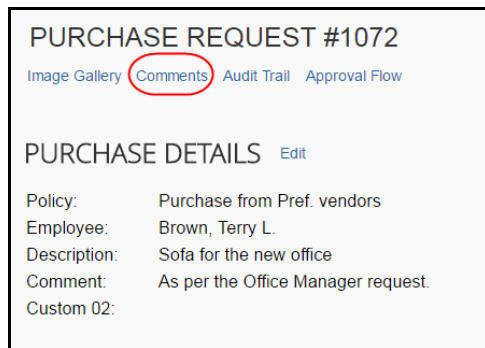
2. Select the image you want to delete and click **Delete Image**.

View Comments

The purchasing admin can view comments about the purchase request that the purchase request user has entered in the **Details** section of the purchase request or that the approver has entered when they have sent back a purchase request to the user.

► **To view comments:**

1. Open the desired purchase request.
2. On the **Request** page, click **Comments**.



3. In the **Comment History** window that appears, view the comments about the purchase request.

Comment History

Date ▾	Entered By	Comment Text
02/17/2015	Simpson, Frank	Currency is 1?

Close

4. Click **Close**.

Review Audit Trail

To review the audit trail, open the purchase request, and then click **Audit Trail**.

PURCHASE REQUEST #1072

Image Gallery

Comments

Audit Trail

Approval Flow

PURCHASE DETAILS

Edit

Policy:

Purchase from Pref. vendors

Employee:

Brown, Terry L.

Description:

Sofa for the new office

Comment:

As per the Office Manager request.

Custom 02:

Section 5: What the Purchasing Admin Can Do

The **Audit Trail** window appears with information about actions that the purchasing admin and the system have taken on the specific purchase request.

Audit Trail			
Date/Time	Updated By	Action	Description
02/17/2015 09:23 AM	Simpson, Frank	Approval Status Change	Status changed from Pending Approval to Approved Comment:
02/17/2015 09:15 AM	Taylor, Sarah	Approval Status Change	Status changed from Submitted to Pending Approval Comment:
02/17/2015 09:15 AM	Taylor, Sarah	Approval Status Change	Status changed from Not Submitted to Submitted Comment:
02/17/2015 09:14 AM	Simpson, Frank	Approval Status Change	Status changed from Pending Approval to Sent Back To Employee Comment: Currency is 1?
02/17/2015 09:13 AM	Taylor, Sarah	Approval Status Change	Status changed from Submitted to Pending Approval Comment:
02/17/2015 09:13 AM	Taylor, Sarah	Approval Status Change	Status changed from Not Submitted to Submitted Comment:
			Close

NOTE: All users who have access to a PO change order transaction will be able to view the audit trail history of the PO Change Order.

View Approval Flow

The purchasing admin can view the workflow to see all the approval steps that are part of the purchase request process. In addition, it is possible to approve or send back the purchase request from the **Approval Flow for Purchase Request** window.

► **To view approval flow:**

1. Open the desired purchase request.
2. On the **Request** page, click **Approval Flow**.

PURCHASE REQUEST #1072

[Image Gallery](#) [Comments](#) [Audit Trail](#) [Approval Flow](#)

PURCHASE DETAILS [Edit](#)

Policy: Purchase from Pref. vendors
Employee: Brown, Terry L.
Description: Sofa for the new office
Comment: As per the Office Manager request.
Custom 02:

3. In the **Approval Flow for Purchase Request** window, review the workflow, and click **Cancel**, or click **Approve** or **Send Back** to approve or send back the purchase request.

Approval Flow for Purchase Request: Laptop

Manager Approval:

Simpson, Frank

+

×

(02/17/2015 Approved)

→ Approval for Processing:

+

+

×

Approve

Send Back

Save Workflow

Cancel

Change Ship-To Address

The purchasing admin can change the ship-to address.

► ***To change the ship-to address:***

1. Open the desired purchase request.
2. In the **Ship To Address** section, click the **Change** link.

The screenshot displays the 'PURCHASE REQUEST #57' interface. At the top, there are links for 'Image Gallery', 'Comments', 'Audit Trail', and 'Approval Flow'. Below these is the 'PURCHASE DETAILS' section with an 'Edit' link. The details include: Policy: Receipt workflow, Employee: Brown, Terry L., Description: fgdfgd, Comment: (empty), and Custom 02: (empty). At the bottom, the 'Ship To Address' section shows the address 'Company Location One2, 1234 Main St, Anytown, WA 98052 US'. A red circle highlights the 'Change' link next to the address.

PURCHASE REQUEST #57

[Image Gallery](#) [Comments](#) [Audit Trail](#) [Approval Flow](#)

PURCHASE DETAILS [Edit](#)

Policy: Receipt workflow
Employee: Brown, Terry L.
Description: fgdfgd
Comment:
Custom 02:

Ship To Address [Change](#)

Company Location One2
1234 Main St
Anytown, WA 98052 US

- Click in the field that appears and select the ship-to name.

PURCHASE REQUEST #57

[Image Gallery](#) [Comments](#) [Audit Trail](#) [Approval Flow](#)

PURCHASE DETAILS [Edit](#)

Brooks Dev
123 Main Street
Bellevue, WA 98004 US

Company Location One1
12345
Main Street
AnyTown, WA 98052 US

Company Location One2
1234 Main St
Anytown, WA 98052 US

Corp Office
32 Baker Street
Seattle, WA 234234 US

Crane LLC
22 State Street

- Click **Save**.

Add a Comment to an Item

Purchasing admins can add comments to an item to clarify an item or to provide more information about the item.

► To add a comment to an item:

- Open the desired purchase request.
- In the **Items** section, click **Show Comments**.

Items

☐ [Add](#) [Delete](#) [Edit](#) [Distribute ▼](#) | ☒ Show Distributions

☐ **Banner** Quantity: 1 Each Total: \$100.00
Expense Type: Advertising Unit Price: 100

Sagapo
(Unapproved)
12 Main Street
Seattle, WA 98077

[Show Comments](#)

Account Code	Distribution Code	Percentage	Net Amount
1000		100	\$100.00

Section 5: What the Purchasing Admin Can Do

3. Click the **Add Comments** link that appears.

The screenshot shows the 'Items' section of a system. At the top, there are buttons: 'Add', 'Delete', 'Edit', and 'Distribute'. A checkbox labeled 'Show Distributions' is checked. Below this, the item 'Banner' is listed with 'Expense Type: Advertising', 'Quantity: 1 Each', 'Unit Price: 100', and 'Total: \$100.00'. The vendor information is 'Sagapo (Unapproved), 12 Main Street, Seattle, WA 98077'. Below the vendor information, there are two links: 'Hide Comments' and 'Add Comment'. The 'Add Comment' link is circled in red. At the bottom, there is a table with columns: 'Account Code', 'Distribution Code', 'Percentage', and 'Net Amount'. The table contains one row with values: '1000', an empty cell, '100', and '\$100.00'.

4. In the comments field, type the comment, and then click **Save**.

The screenshot shows the 'Items' section with the 'Banner' item. Below the vendor information, there is a text input field containing the text 'Check vendor.' and a 'Save' button. The 'Add Comment' link from the previous screenshot is no longer visible. The table at the bottom remains the same.

The comment appears in the **Items** section.

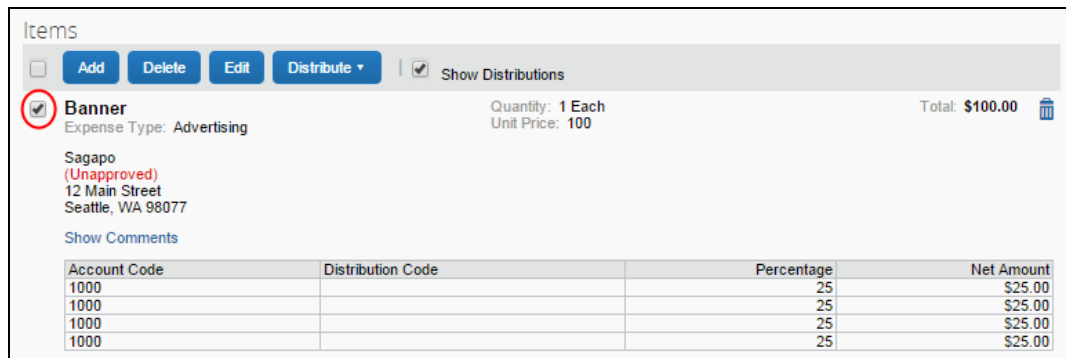
The screenshot shows the 'Items' section with the 'Banner' item. Below the vendor information, there is a link labeled 'Hide Comments'. Below this link, the comment 'Check vendor.' is displayed, preceded by the text 'Terry L. Brown added a comment - 02/02/2016 03:24 PM'. The 'Add Comment' link is still visible below the comment. The table at the bottom remains the same.

Delete an Item from a Purchase Request

The purchasing admin can delete an item from the purchase request.

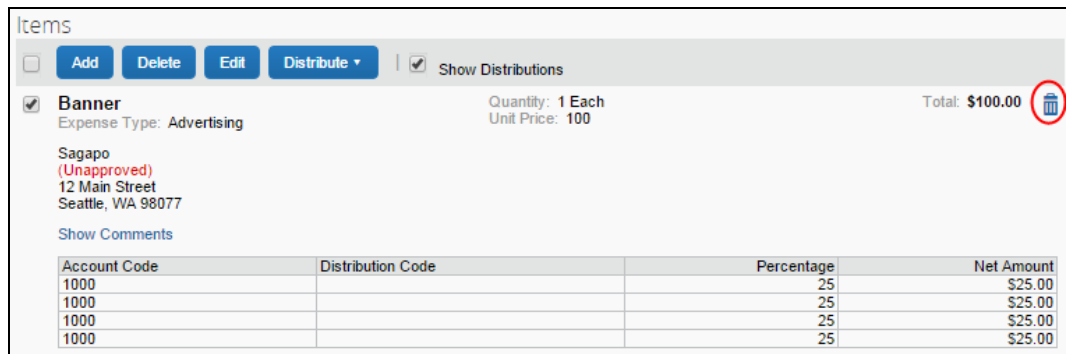
► **To delete an item from a purchase request:**

1. Open the desired purchase request.
2. In the **Items** section, select the item that you want to remove.



Account Code	Distribution Code	Percentage	Net Amount
1000		25	\$25.00
1000		25	\$25.00
1000		25	\$25.00
1000		25	\$25.00

3. Click the **Trash** icon.



The system will remove the item from the purchase request.

Distribute (Allocate) a Purchase Request

The purchasing admin, who processes purchase requests, can specify distributions at the line item level, so that they can allocated the cost of the purchase accurately. In addition, if they want to apply the same distributions to all line items, they can specify the distributions once and apply it to all line items.

NOTE: Both the purchase request user and the approver can also create and manage distributions (allocations).

Section 5: What the Purchasing Admin Can Do

► **Distribute a purchase request:**

1. Open the desired purchase request.
2. On the **Request** page, select one or more itemizations to that you want to distribute between departments.

Items

☒ **Add** **Delete** **Edit** **Distribute ▼** | ☒ Show Distributions

☒ **Banner**
Expense Type: Advertising
Quantity: 1 Each
Unit Price: 100
Total: \$100.00

Sagapo
(Unapproved)
12 Main Street
Seattle, WA 98077

[Hide Comments](#)

Terry L. Brown added a comment - 02/02/2016 03:24 PM
Check vendor.

[Add Comment](#)

Account Code	Distribution Code	Percentage	Net Amount
1000		100	\$100.00

3. Click **Distribute > Distribute Selected Items**.

Items

☒ **Add** **Delete** **Edit** **Distribute ▼** | ☒ Show Distributions

☒ **Banner**
Expense Type: Advertising
Quantity: 1 Each
Unit Price: 100
Total: \$100.00

Sagapo
(Unapproved)
12 Main Street
Seattle, WA 98077

[Hide Comments](#)

Terry L. Brown added a comment - 02/02/2016 03:24 PM
Check vendor.

[Add Comment](#)

Account Code	Distribution Code	Percentage	Net Amount
1000		100	\$100.00

The **Distribute Selected Items** page appears.

Distribute Selected Items

Distributions | **Distribution Summary** | Total: 200.00 | Distributed: 0.00 (0%) | Remaining: 200.00 (100%)

Distribute By ▼ | **Add** **Delete** **Favorites ▼** **Add to Favorites**

<input type="checkbox"/> Amount	Project	Distribution Code
---------------------------------	---------	-------------------

Save **Cancel**

- Click **Distribute By** and select to distribute the allocation by amount or by percentage.

Distribute Selected Items

Distributions | Distribution Summary | Total: \$100.00 | Distributed: \$100.00 (100%) | Remaining: \$0.00 (0%)

Distribute By ▾ | Add | Delete | Favorites ▾ | Add to Favorites

	Custom 1	Custom 2	Custom 3	Custom 4	Distribution Code
Percentage					
Amount					

Save Cancel

- Click **Add**. The total is now evenly spread between the number of allocations (you may adjust these manually, but the percent must equal 100 or the amount the overall total, excepting tax and shipping before you can proceed).

Distribute Selected Items

Distributions | Distribution Summary | Total: \$100.00 | Distributed: \$100.00 (100%) | Remaining: \$0.00 (0%)

Distribute By ▾ | Add | Delete | Favorites ▾ | Add to Favorites

	Custom 1	Custom 2	Custom 3	Custom 4	Distribution Code
<input type="checkbox"/> Amount					
<input type="checkbox"/> 100.00					
<input type="checkbox"/> 0.00					

Save Cancel

- Complete all required fields and the optional fields as directed by your company. (Your company defines the fields that appear on this page.)
- Click **Save**.

You can add or delete an item by clicking the **Add** or **Delete** button respectively.

IMPORT DISTRIBUTIONS

The purchasing admin can import their distributions (allocations) by using the Import feature. This feature supports clients who need to distribute a single purchase request across a large number of cost objects. For example, the corporate office may decide one purchase request should be shared by all 400 company retail locations. Imported distributions can be:

- Specified to import as either percentage or amount, with restrictions based on the sign (negative or positive)
- Applied across multiple line items at once

► **To import distributions:**

1. Double-click the purchase request that you would like to open.
2. On the **Request** page, in the **Items** section, select the item for which you want to import distributions.

Account Code	Distribution Code	Percentage	Net Amount
1000		100	\$100.00

3. Click **Distribute**, and then **Import Distributions**.

4. In the **Import Distributions** window that appears, click **Browse** to select the file that you want to import. You may download a sample Excel file (.xls) template based off distribution (allocation) configuration fields by clicking **Download Template**.

5. Select the file to import, and then click **Open**.
6. Click **Import**.

Concur Invoice imports the distributions and displays them in the invoice.

7. Click **Save**.

NOTE: While Concur Invoice imports the distributions, error checking and validations are processed, and the results appear in the **Import Errors** window.

CREATE AND MANAGE ALLOCATION FAVORITES

The purchasing admin has the same ability as the purchase request user and approver to create and manage allocations.

► **To create an allocation favorite:**

1. Open the desired purchase request.
2. On the **Request** page, in the **Items** section, select the item for which you want to create a favorite allocation.

Items

☒ **Add** **Delete** **Edit** **Distribute ▼** | ☒ Show Distributions

☒ **Banner** Quantity: 1 Each Total: \$100.00
Expense Type: Advertising Unit Price: 100

Sagapo
(Unapproved)
12 Main Street
Seattle, WA 98077

[Hide Comments](#)

Terry L. Brown added a comment - 02/02/2016 03:24 PM
Check vendor.

[Add Comment](#)

Account Code	Distribution Code	Percentage	Net Amount
1000		100	\$100.00

3. Click **Distribute > Distribute Selected Items**.

Items

☒ **Add** **Delete** **Edit** **Distribute ▼** | ☒ Show Distributions

☒ **Banner** Quantity: 1 Each Total: \$100.00
Expense Type: Advertising Unit Price: 100

Sagapo
(Unapproved)
12 Main Street
Seattle, WA 98077

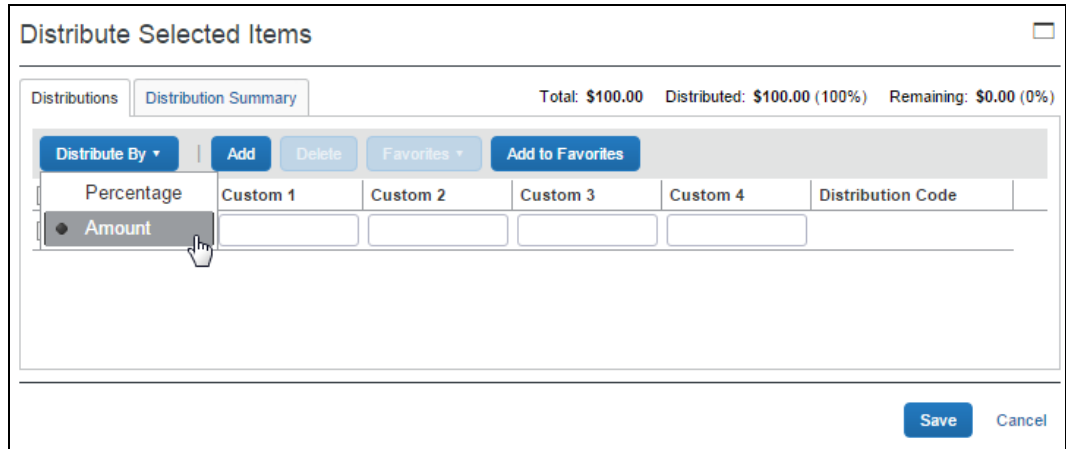
[Hide Comments](#)

Terry L. Brown added a comment - 02/02/2016 03:24 PM
Check vendor.

[Add Comment](#)

Account Code	Distribution Code	Percentage	Net Amount
1000		100	\$100.00

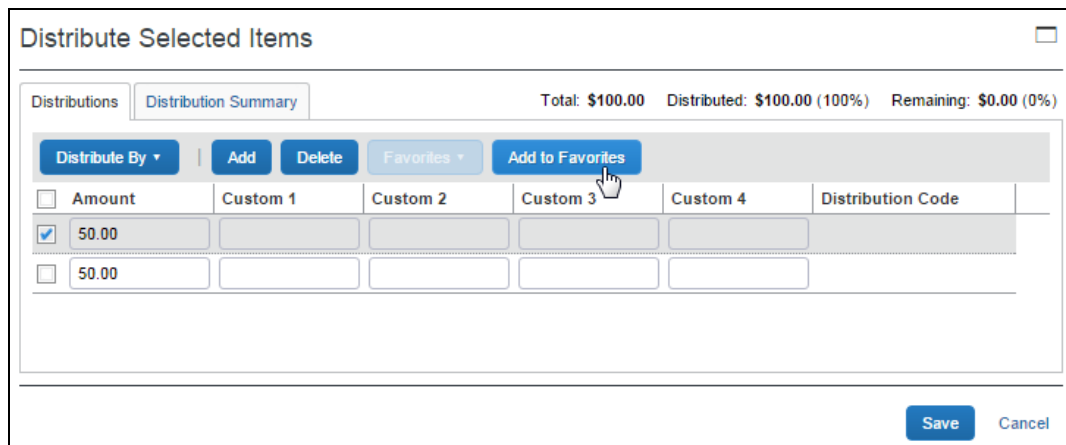
4. In the **Distribute By** menu, select if you would like to distribute the allocation by amount or percentage.



The screenshot shows the 'Distribute Selected Items' window. At the top, there are tabs for 'Distributions' and 'Distribution Summary'. To the right, it displays 'Total: \$100.00', 'Distributed: \$100.00 (100%)', and 'Remaining: \$0.00 (0%)'. Below this is a toolbar with buttons: 'Distribute By' (a dropdown menu), 'Add', 'Delete', 'Favorites' (a dropdown), and 'Add to Favorites'. The 'Distribute By' dropdown is open, showing two options: 'Percentage' and 'Amount'. The 'Amount' option is selected, indicated by a radio button and a mouse cursor. Below the dropdown is a table with columns: 'Custom 1', 'Custom 2', 'Custom 3', 'Custom 4', and 'Distribution Code'. At the bottom right are 'Save' and 'Cancel' buttons.

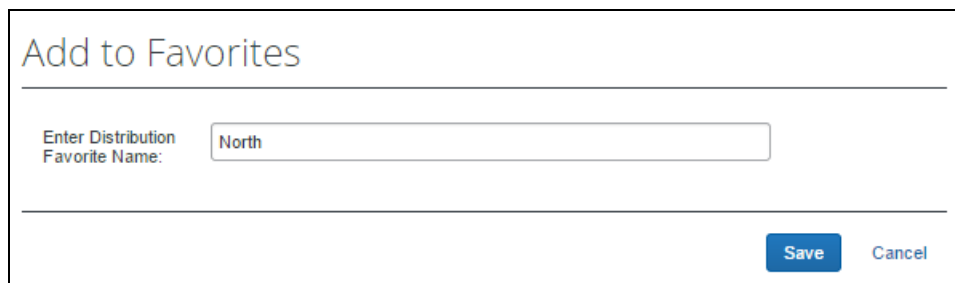
NOTE: You can use the **Add** button to correctly identify and budget the expense to the accounting system. For example, use this if your need to spread your expenses across several projects or departments.

5. Click **Add to Favorites**.



This screenshot is similar to the previous one, but the 'Add to Favorites' button in the toolbar is now highlighted with a mouse cursor. The 'Distribute By' dropdown is still open, showing 'Amount' selected. The table below has three rows. The first row has a checked checkbox in the 'Amount' column and the value '50.00'. The second and third rows have unchecked checkboxes and the value '50.00'. The 'Custom 1' through 'Custom 4' and 'Distribution Code' columns are empty for all rows. The 'Save' and 'Cancel' buttons are at the bottom right.

The **Add to Favorites** window opens.



The screenshot shows the 'Add to Favorites' window. It has a title bar 'Add to Favorites'. Below the title bar is a text input field labeled 'Enter Distribution Favorite Name:'. The text 'North' is entered in the field. At the bottom right are 'Save' and 'Cancel' buttons.

Section 5: What the Purchasing Admin Can Do

6. Enter a name for the allocation favorite and then click **Save**. The system adds the allocation to your favorites, which you can see if you click **Favorites**.

Distribute Selected Items

Distributions | Distribution Summary

Total: \$100.00 Distributed: \$100.00 (100%) Remaining: \$0.00 (0%)

Distribute By | Add | Delete | Favorites | Add to Favorites

<input type="checkbox"/> Percentage	Custom 1	North	X	Custom 3	Custom 4	Distribution Code
<input checked="" type="checkbox"/> 50						
<input type="checkbox"/> 50						

Save Cancel

Process Purchase Orders

The purchasing admin typically reviews a purchase order for *buying* details. This means, for example, reviewing the PO for correct shipping method and terms, and reviewing the selected vendor to ensure it is a preferred supplier.

To process purchase orders, the purchasing admin clicks **Requests > Process Purchase Orders**. Here, the purchasing admin can review PO requests pending all approvers and perform processing tasks on the PO request.

SAP Concur | Requests | Approvals | App Center

Process Purchase Requests | Process Purchase Orders | Purchase Order Extracts

Purchase Orders Pending Transmission | Global Group

Query | Actions | Preferences

Search: Order No. | Begins with |

Order No.	Requestor	Vendor Name	Ship To	Status	Total Invoiced	Needed...	Total	Name	Request No.
21	Brown, Terry L.	Simpatico Furnishi...	Corp Office	Pending Transmiss...	0 %	\$34.00			40
22	Brown, Terry L.	Concave	Company Location ...	Pending Transmiss...	0 %	05/10/2...	\$123.56		52

Page 1 of 1 | Displaying 1 - 1 of 1

NOTE: The default view showing all requests pending processing appears for new clients only.

With the purchase order open in detail view, the purchasing admin can perform the following actions:

- Review and change the selected vendor
- Change the *Ship To* and *Bill To* values
- Create queries to search for requests
- Send the request associated with an *untransmitted* PO back to the requestor (the PO number is voided, and a new PR is created in this scenario)

- Void *transmitted* POs
- Close *transmitted* POs
- View associated image(s) for the POs
- Review the original payment or purchase requests associated with this purchase order
- Edit certain purchase order details such as description and need-by date
- Review the audit trail
- Preview purchase orders, in PDF format
- Transmit POs to vendors

Review or Change a Vendor

► ***To view or change a vendor:***

1. Double-click the desired purchase order. The **Purchase Order** window appears.
2. In the **Vendor** section, click **View Details** or **Edit** depending on what you want to do.

The screenshot displays the SAP Concur Purchase Order window for Purchase Order 4. The interface includes a top navigation bar with options like 'Manage Requests', 'Create New', 'Process Requests', 'Quick Search', 'Budget Insight', and 'Purchase Requests'. Below this, there are links for 'View Image Gallery', 'View Associations', and 'Audit Trail'. The main section is titled 'PURCHASE ORDER 4' and includes details such as 'Transmitted to Vendor', 'Requested by Collins, Chris L.', and buttons for 'Transmit', 'Preview', and 'Actions'. The 'Purchase Order Details' section lists various fields like Policy Name, Name, PO Number, Order Date, Net Payment, Terms, Tax, Shipping, and Total. The 'Vendor' section is highlighted with a red circle around the 'View Details' and 'Edit' links. Other sections include 'Ship To' and 'Bill To' with their respective addresses and codes.

Purchase Order Details		Vendor	Ship To	Bill To
Policy Name:	Purchase from Pref. vendors	4444	Company Location One2	Corp Office
Name:		14 Duke Road Hartford, Connecticut	1234 Main St Anytown, Wa 98052	Baker Street Cityville, Stanton 778667
PO Number:	4	Vendor Code: 1244 Address Code: 4444	Address Code: CLOne	Address Code: 123
Order Date:	08/27/2015	Currency: USD-US, Dollar		
Net Payment	0	View Details Edit	Edit	Edit
Terms:				
Tax:	0.00			
Shipping:	0.00			
Total:	100.00			

Change Ship-To or Bill-To Address

► **To change the ship-to or bill-to address:**

1. Double-click the desired purchase order. The **Purchase Order** window appears.
2. In the **Ship To** or **Bill To** section, click **Edit**.

The screenshot shows the 'PURCHASE ORDER 4' window. At the top, there are navigation tabs: 'Manage Requests', 'Create New', 'Process Requests', 'Quick Search', 'Budget Insight', and 'Purchase Requests'. Below these are links for 'View Image Gallery', 'View Associations', and 'Audit Trail'. The main header displays 'PURCHASE ORDER 4', 'Transmitted to Vendor', and 'Requested by Collins, Chris L.'. There are three buttons: 'Transmit', 'Preview', and 'Actions'. The window is divided into three main sections: 'Purchase Order Details', 'Vendor', and 'Ship To'/'Bill To'. The 'Purchase Order Details' section includes fields for Policy Name, Name, PO Number, Order Date, Net Payment, Terms, Tax, Shipping, and Total. The 'Vendor' section includes fields for Vendor Code, Address Code, and Currency. The 'Ship To' section includes fields for Company Location, Address, and Address Code. The 'Bill To' section includes fields for Corp Office, Address, and Address Code. Each of the 'Ship To' and 'Bill To' sections has an 'Edit' button circled in red.

3. In the **Change Address** window, select a different ship-to or bill-to address.

Change Address window (ship-to address):

The screenshot shows the 'Change Address' window. It has a title bar 'Change Address'. Below the title bar is a search instruction: 'Search for a Ship To Name from your Company Locations list, rather than some other address element such as City or State. You can also use the down arrow key to expand the list.' There is a 'Ship To' label and a text input field. The input field contains 'SHIPName' and a dropdown list with three options: '123 Baker Lane', 'Louisville', and 'Chicago, 98777'. At the bottom right, there are 'Save' and 'Cancel' buttons.

Change Address window (bill-to address):

The 'Change Address' window has a title bar 'Change Address'. Below it is a text instruction: 'Search for a Bill To Name from your Company Locations list, rather than some other address element such as City or State. You can also use the down arrow key to expand the list.' Below this is a 'Bill To' label and a search input field. The input field contains 'BILLName' and has a dropdown menu open showing 'address1', 'address2', 'address3', and 'city, zip'. At the bottom right are 'Save' and 'Cancel' buttons.

4. Click **Save**.

Edit Purchase Order Details

Purchasing admins can edit some of the details, for example, the description, need-by date, or shipping cost of the purchase order.

► **To edit purchase order details:**

1. Open the desired purchase order.
2. Click **Edit**.

The 'Purchase Order Details' window shows the header 'PURCHASE ORDER RV2' with links 'View Image Gallery', 'View Associations', and 'Audit Trail'. Below the header is 'Transmitted to Vendor' and 'Requested by Miller, Chris'. There are three buttons: 'Transmit' (orange), 'Preview' (blue), and 'Actions' (blue with a dropdown arrow). Below the buttons is a tabbed interface with 'Purchase Order Details' and 'Edit' (highlighted with a mouse cursor). The 'Purchase Order Details' tab shows the following information:

PO Number:	RV2
Name:	
Description:	
Net Payment	30
Terms:	
Order Date:	10/11/2016
Need By Date:	10/31/2016
Shipping:	0.00
Tax:	0.00
Total:	900.00
Currency:	US, Dollar

Section 5: What the Purchasing Admin Can Do

3. In the **Purchase Order Details** window that appears, edit the fields and then click **Save**.

Purchase Order Details

PO Number RV2	Name 	Description 	Net Payment Terms 30
Order Date 10/11/2016	Need By Date 10/31/2016	Shipping 0.00	Tax 0.00
Total 900.00	Currency US, Dollar		

Save Cancel

Send Back a Purchase Order

Purchasing admins can send back a purchase order *prior* to transmittal to vendor to remove a purchase order from its workflow for the purpose of additional review, correction of the associated purchase request amount or cost object, or amend some additional items to the PR.

When a **Send Back** action is taken on the PO, the assigned PO number is voided, the original associated request item(s) are made read-only, and a new, duplicate PR is created with a status of *Sent Back to Employee* that includes the original items and allocations that were part of the now-retired PO. An indicator is also added to the new PR to show it was generated based on a now-invalid PR.

Finally, an email notification is generated and sent based on the purchase request email notification settings for the requestor. The image below shows a sample email body text:

At least one item from an approved Purchase Request has been sent back. A new Purchase Request containing the item(s) has been created on your behalf.

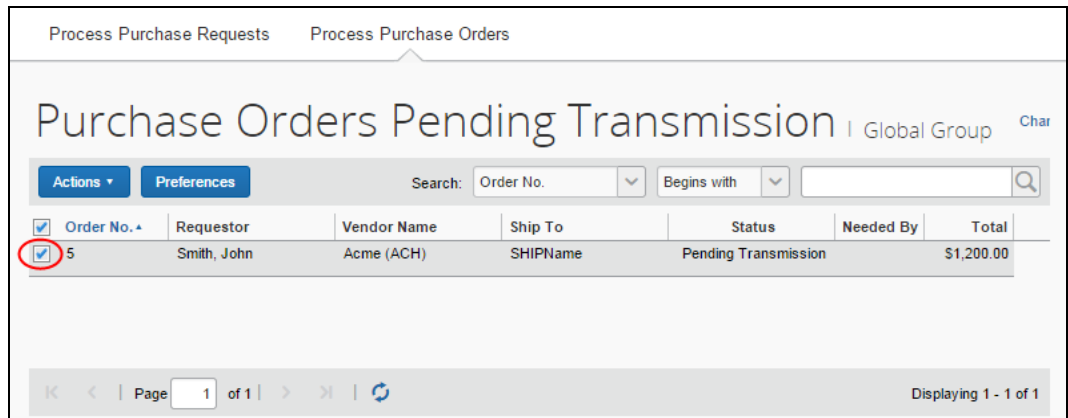
Original Request: <original request number>

Original Request Description: <original description>

New Request: <new request number>

► **To send back a purchase order:**

1. On the **Purchase Orders Pending Transmission** page, select the purchase order you want to send back by clicking its check box.



Process Purchase Requests | Process Purchase Orders

Purchase Orders Pending Transmission | Global Group

Char

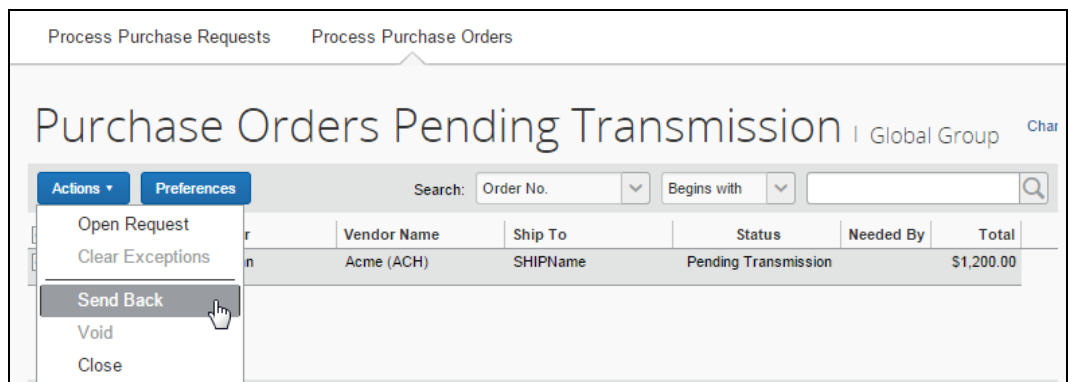
Actions ▾ Preferences

Search: Order No. ▾ Begins with ▾

<input checked="" type="checkbox"/>	Order No. ▴	Requestor	Vendor Name	Ship To	Status	Needed By	Total
<input checked="" type="checkbox"/>	5	Smith, John	Acme (ACH)	SHIPName	Pending Transmission		\$1,200.00

Page 1 of 1 | Displaying 1 - 1 of 1

2. On the **Actions** menu, click **Send Back**.



Process Purchase Requests | Process Purchase Orders

Purchase Orders Pending Transmission | Global Group

Char

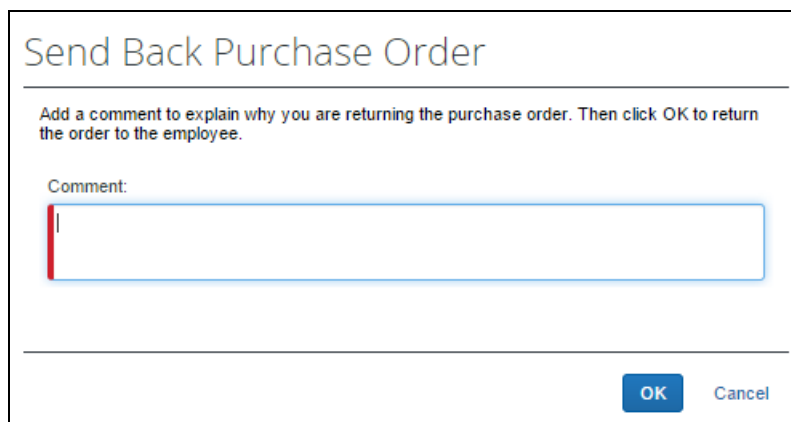
Actions ▾ Preferences

Search: Order No. ▾ Begins with ▾

	Order No. ▴	Requestor	Vendor Name	Ship To	Status	Needed By	Total
	5	Smith, John	Acme (ACH)	SHIPName	Pending Transmission		\$1,200.00

Open Request
Clear Exceptions
Send Back
Void
Close

3. In the **Send Back Purchase Order** window that appears, enter a comment about why you want to send back the purchase order, and then click **OK**.



Send Back Purchase Order

Add a comment to explain why you are returning the purchase order. Then click OK to return the order to the employee.

Comment:

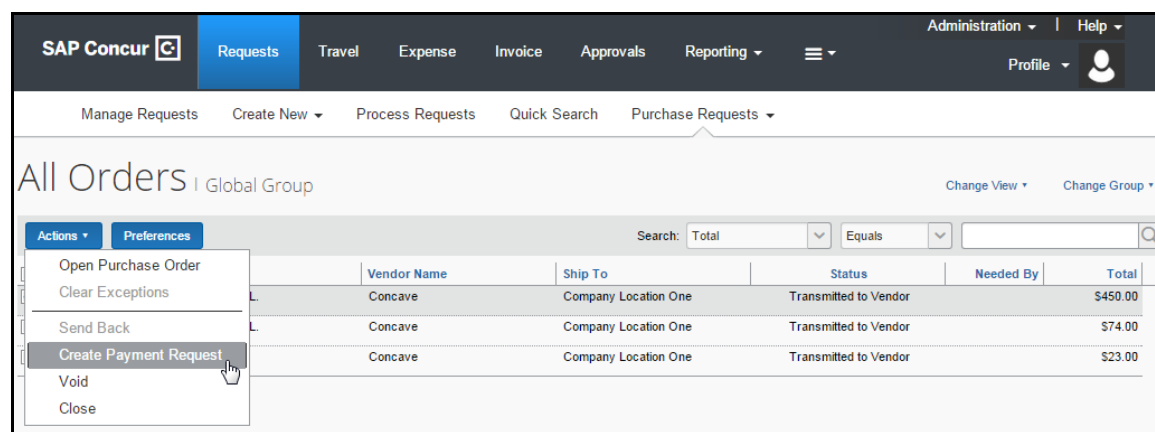
OK Cancel

Create Invoices From Transmitted Purchase Orders

When purchasing admins view their list of purchase orders, they can create an invoice from a purchase order on this list. The option to create an invoice from the PO list is available only when the purchasing admin selects a single, transmitted PO that has not yet been closed.

This feature is useful when, for example, the supplier has sent a PO-based invoice, but not provided the purchase order number of that invoice.

The purchasing admin can create the invoice in the **Actions** menu on the **All Orders** page.



Void a Purchase Order

A purchasing admin may want to void a purchase order *after* transmittal to vendor if, for example, the order cannot be fulfilled due to a discontinued item, or if there are vendor issues or changes in the business environment that deems the PO invalid.

When a purchasing admin voids a purchase order, the system sets the PO to *Voided*. A record of the PO remains in the system, but the PO is *not* included in any listing or extract of general purchase orders. However, voided purchase orders can be included in search result lists by filtering the search where the status is equal to *Voided*.

Voiding the PO is a "housecleaning" measure used to ensure any associated invoices referencing this PO Number will be identified and handled appropriately.

NOTE: Before the purchasing admin voids a purchase order, the system must first extract the PO.

► **To void a purchase order:**

1. On the **All Orders** page, select the purchase order you want to void by clicking its check box.

Order No.	Requestor	Vendor Name	Ship To	Status	Needed By	Total
3	Smith, John	Acme (ACH)	SHIPName	Transmitted to Vendor		\$200.00
4	Smith, John	Acme (ACH)	SHIPName	Transmitted to Vendor		\$30.00
5	Smith, John	Acme (ACH)	SHIPName	Pending Transmission		\$1,200.00

2. On the **Actions** menu, click **Void**.

Order No.	Requestor	Vendor Name	Ship To	Status	Needed By	Total
n		Acme (ACH)	SHIPName	Transmitted to Vendor		\$200.00
n		Acme (ACH)	SHIPName	Transmitted to Vendor		\$30.00
n		Acme (ACH)	SHIPName	Pending Transmission		\$1,200.00

3. In the **Void Purchase Order** window that appears, enter a comment about why you want to void the purchase order, and then click **OK**. The system updates the audit log and changes the status of the purchase order to *Voided*.

Void Purchase Order

Add a comment to explain why you are voiding the purchase order. Then click OK to return the order to the employee.

Comment:

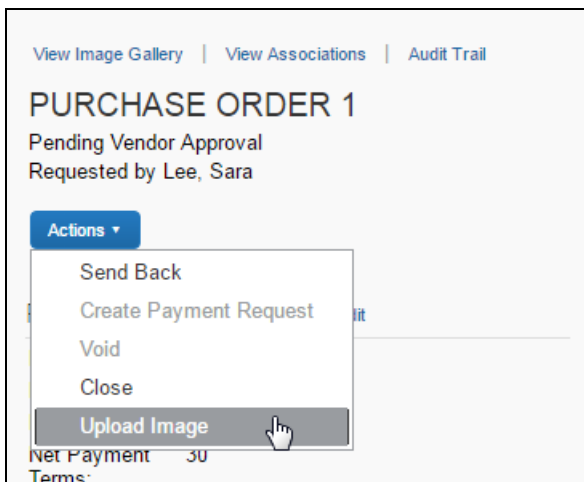
OK Cancel

Upload, View, and Delete Images

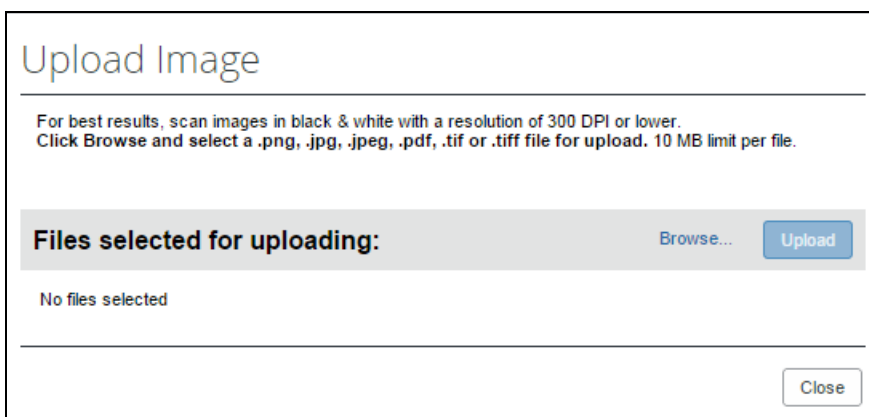
The purchasing admin, who processes purchase orders, can upload, view, and delete images of purchase orders.

► **To upload an image:**

1. Open the desired purchase order.
2. On the **Request** page, click **Actions** > **Upload Image**.

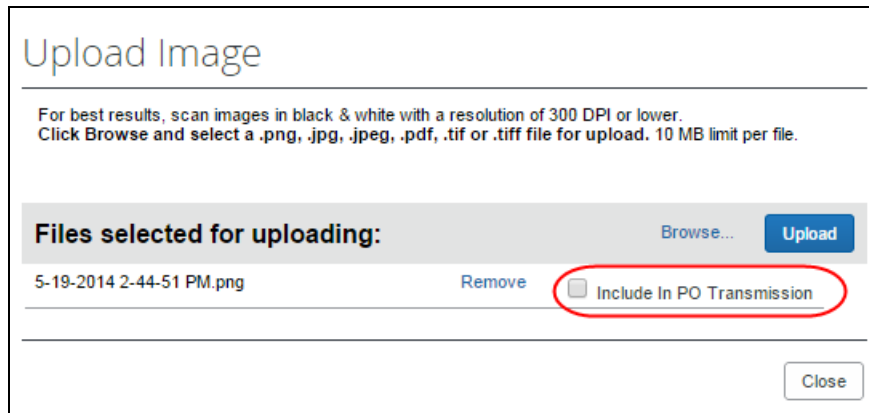


The **Upload Image** window appears.



3. Click **Browse** and select the desired image by double-clicking it, or by selecting it and clicking **Open**.

4. (Optional) Select (enable) the **Include in PO Transmission** check box.



Upload Image

For best results, scan images in black & white with a resolution of 300 DPI or lower.
Click Browse and select a .png, .jpg, .jpeg, .pdf, .tif or .tiff file for upload. 10 MB limit per file.

Files selected for uploading: Browse... Upload

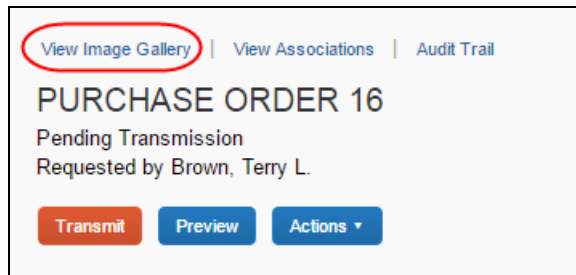
5-19-2014 2-44-51 PM.png Remove ☒ Include In PO Transmission

Close

5. Click **Upload**.
6. Click **Close**.

► **To view an image:**

1. On the **Purchase Order** page, click **View Image Gallery**.



[View Image Gallery](#) | [View Associations](#) | [Audit Trail](#)

PURCHASE ORDER 16

Pending Transmission
Requested by Brown, Terry L.

Transmit Preview Actions ▼

The **Purchase Order Images** window appears. If there are more than one image or supporting document, you can toggle between them by using the **Next** and **Previous** buttons.

NOTE: You can also include supporting documents in the PO transmission from the **Purchase Order Images** window by selecting (enabling) the **Include in PO Transmission** check box.

Section 5: What the Purchasing Admin Can Do

Purchase Order Images

☐ Include In PO Transmission [Delete Image](#) [Previous](#)

Axis Office Enterprises, Inc
10700 Prairie Lakes Drive
Eden Prairie, MN 55344 (555) 555-555

SOLD TO:
Concur
601 108th Avenue NE
Suite 1000
Bellevue, WA 98004

INVOICE NUMBER
INVOICE DATE
Project Number ▾

[Save](#) [Cancel](#)

2. Click **Save** or **Cancel** when you are done.

► **To delete an image:**

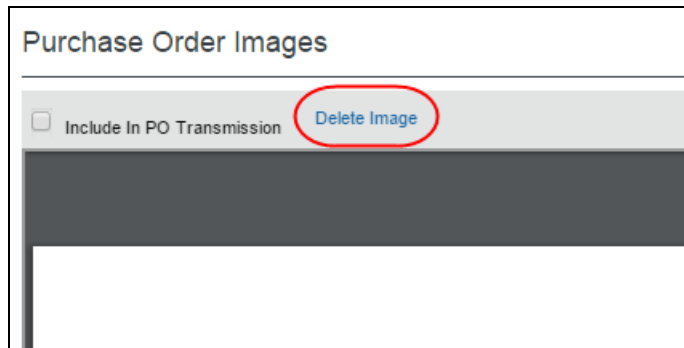
1. On the **Purchase Order** page, click **View Image Gallery**.

[View Image Gallery](#) | [View Associations](#) | [Audit Trail](#)

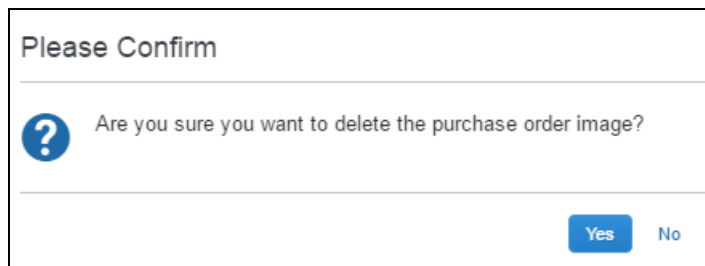
PURCHASE ORDER 16
Pending Transmission
Requested by Brown, Terry L.

[Transmit](#) [Preview](#) [Actions ▾](#)

- In the **Purchase Order Images** window, click **Delete Image**.



The **Please Confirm** window appears.

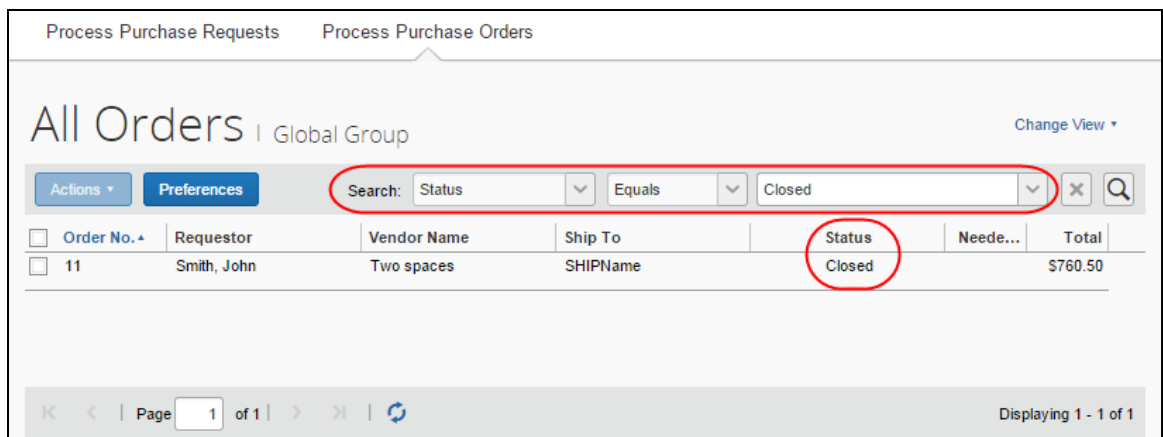


- Click **Yes**. Once you have deleted an image, the next image, if there is one, appears.

Close a Purchase Order

When a purchasing admin closes a purchase order *after* transmittal to vendor, the system removes the closed PO from the list of purchase orders pending actions. This helps the processor to manage their POs and their statuses more efficiently.

If the purchasing admin wants to search on closed POs, they can do so by selecting *Status Equals Closed* in the search area. The page will list all the closed POs.

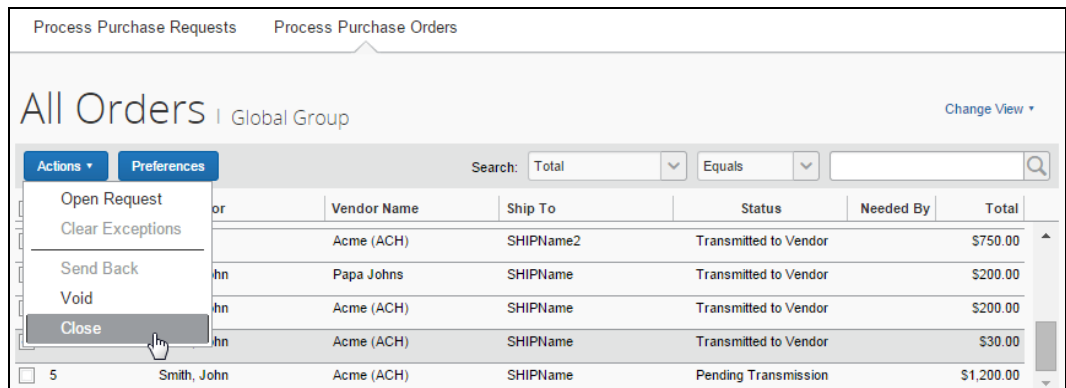


NOTE: Please note that the purchasing admin cannot copy a request if it is associated with a closed PO.

NOTE: If the client uses an external purchasing system, a standard PO import into Concur Invoice can update any PO with a *Closed* status.

► **To close a purchase order:**

1. On the **All Orders** page, select the purchase order you want to close by clicking its check box.
2. On the **Actions** menu, click **Close**.



3. In the **Close Purchase Order** window that appears, enter a comment about why you want to close the purchase order, and then click **OK**. When the purchasing admin has closed the PO, it will no longer appear in the list of that page.

Close Purchase Order

Add a comment to explain why you are closing the purchase order.

Comment:

OK Cancel

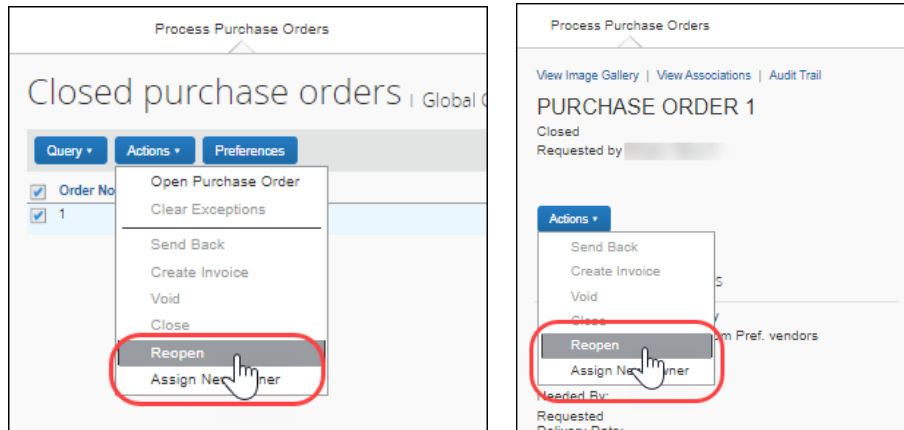
In addition, a closed PO will not be available in the list of active POs for matching invoices.

Reopen a Closed Purchase Order

Users with the Purchasing Admin role can reopen closed purchase orders. This is useful when a PO has been incorrectly closed and needs to be reopened and processed correctly.

► **To reopen a closed purchase order:**

1. On the **Closed purchase orders** page or in an opened purchase order, in the **Actions** menu, select **Reopen**.



The **Reopen Purchase Order** window appears.

The screenshot shows the 'Reopen Purchase Order' window. It has a title bar 'Reopen Purchase Order'. Below the title bar is a text area with the placeholder text 'Add a comment to explain why you are reopening the purchase order.' and a label 'Comment:'. At the bottom right are 'OK' and 'Cancel' buttons.

2. In the **Comments** field, enter a comment and then click **OK**. The PO is reopened with the status it was in when it was closed. For example, if the status of the PO was *Transmitted to Vendor* when the PO was closed, the PO will be reopened with a status of *Transmitted to Vendor*.

View Associated Images to the Purchase Order

To view associated images to the purchase order, click **View Image**.

Process Purchase Requests | Process Purchase Orders

[View Image](#) | [View Associations](#) | [Audit Trail](#)

Purchase Order 10

Pending Transmission
Requested by Smith, John

[Transmit](#) [Preview](#) [Actions](#)

Purchase Order Details | [Edit](#)

PO Number: 10
Name:

Vendor
1234
123 Main Street
Bellevue, WA 98004
Vendor Code: BDA4F797BED64B21855631A2CF9B8

Search for a Purchase Order

Purchasing admins can search for purchase orders that are pending transmission or all purchase orders in the search area by selecting different search criteria, such as *Requestor Last Name*, *Total*, or *Vendor Name*.

Process Purchase Requests | Process Purchase Orders

Purchase Orders Pending Transmission | Global Group

[Change View](#)

[Actions](#) [Preferences](#)

Search: Order No. Begins with

<input type="checkbox"/>	Order No.	Requestor	Vendor Name	Ship To	Order No.	Requestor Last Name	Vendor Name	Needed By	Total
<input type="checkbox"/>	10	Smith, John	Home Style	SHIPName					\$25.00
<input type="checkbox"/>	8	manahan, rowena	National Books Store	SHIPName					\$5.00
<input type="checkbox"/>	9	Taylor, Sarah	National Books Store	SHIPName					\$56.00

Pending Transmission

CHANGE VIEW SEARCH OPTION

Purchasing admins can also use the **Change View** menu to display purchase orders or change orders pending transmission or purchase orders pending vendor approval. By changing the view, the result appears on the page.

[Change View](#) [Change Group](#)

- Purchase Orders Pending Transmission
- Purchase Orders Pending Vendor Approval
- All Orders
- Change Orders Pending Transmission

Use a Query to Search for a Purchase Order

You can also search for a purchase order by using standard queries or those you create yourself using options within the **Query** section of PO Processor. The query can be created by clicking **New Query** where you can build a customized, condition-based query to return your purchase orders, or you can select an existing query that you have created.

CREATE A CUSTOM QUERY

You can create a new query for your personal use on the **Purchase Orders Pending Transmission** page. Queries you create are your own and cannot be viewed, edited, deleted, or used by anyone else. This means that all newly created queries cannot be shared across processors.

► To create a new query:

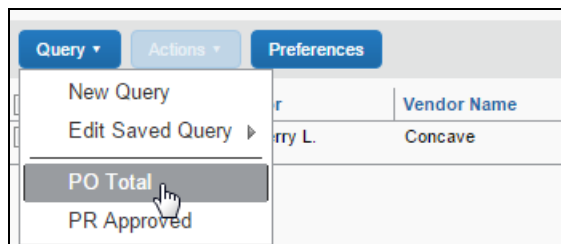
1. Click **Query > New Query**.
2. In the **Query Builder** window, build the conditions for the query.

The screenshot shows the 'Query Builder' window. At the top, there is a 'Query Name' text field. Below it are 'Insert' and 'Remove' buttons. The main area is a table with three columns: 'Data Object/Operator', 'Field/Value', and 'Operation'. The first row has a dropdown menu with 'Select One' selected. The second row has a 'Value' dropdown menu. At the bottom right, there are four buttons: 'Save & Run', 'Save', 'Delete', and 'Cancel'.

Data Object/Operator	Field/Value	Operation
Select One		
Value		

3. Click:

- ♦ **Save & Run:** Saves the query in the **Query** menu, and runs it immediately, returning the results.
- ♦ **Save:** Saves the query for use in the **Query** menu.

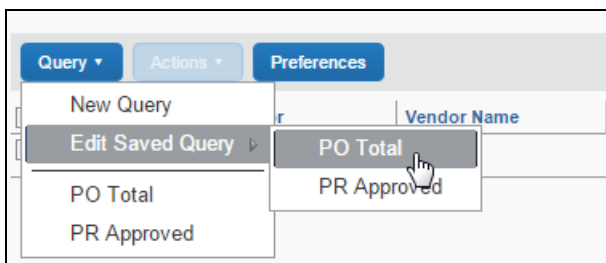


EDIT A SAVED QUERY

You are allowed to edit only those custom queries you have created, and no other user-created custom queries are available for edit, only your own.

▶ **To edit your custom queries:**

1. Click **Queries > Edit Saved Query** and point to the query you wish to edit.



2. Click the query in the list to open it in the **Condition Builder** window. Refer to *Create a Custom Query* in this document to edit your query.
3. When done click:
 - ♦ **Save & Run:** Saves the query in the **Query** menu, and runs it immediately, returning the results.
 - ♦ **Save:** Saves the query for use in the **Query** menu.

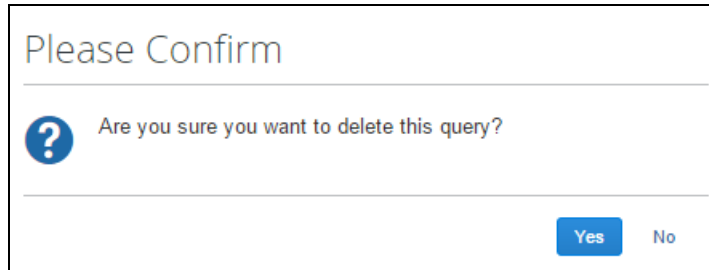
DELETE A QUERY

You may delete only those custom queries that you have created. You cannot delete others user-created custom queries.

▶ **To delete your custom query:**

1. Click **Queries > Edit Saved Query** and point to the query you wish to delete.
2. Click the query in the list to open it in the **Condition Builder** window.

3. Click **Delete**.
4. In the **Please Confirm** window that appears prompting you to confirm your action of deleting the query, click **Yes**.



Please Confirm

Are you sure you want to delete this query?

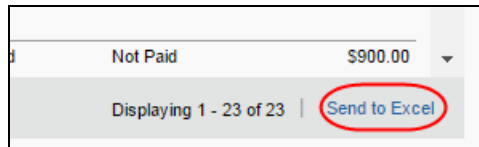
Yes No

EXPORT QUERY RESULTS

You can export your query results into an Excel-based data template. This allows you to open Excel and load the results of your query for use in application.

► **To export the results of your query:**

1. Run the query for the results you are seeking.
2. Click **Send to Excel** in the lower-right corner of the page.



Not Paid \$900.00

Displaying 1 - 23 of 23 | Send to Excel

The data is loaded and automatically appears in Excel with each column representing a field within the purchase order.

	A	B	C	D	E	F
1	Purchase Request Key	Employee Name	Description	PO Number	Approval Status	Submit Date
2		31 Brown, Terry L	PC Docks		Pending Processor Review	2015-10-05 16:43:39.187

View PO Amount That Has Been Invoiced

PO Processor can see how much of the purchase order amount that has been invoiced. To do so, the PO Processor may create a query that defines if a purchase order has been fully or partially invoiced, or not invoiced at all. This information is important and lets the PO Processor take necessary actions, such as closing the purchase order, or contact the vendor regarding the outstanding invoices.

NOTE: The query will be based on approved invoices.

Section 5: What the Purchasing Admin Can Do

In the following example, the system will query for purchase orders where 90 percent or more of the PO amount have been invoiced.

Query Builder

Query Name:

[Insert](#) [Remove](#)

Data Object/Operator	Field/Value
<input type="text" value="Purchase Order"/>	Total Invoiced Net Amount(In Percentage)
<input type="text" value="Greater Than"/>	
<input type="text" value="Value"/>	<input type="text" value="20"/>

By clicking the **Preferences** button, the PO Processor can add the new column, **Total Invoiced Net Amount (in Percentage)** to the **Purchase Orders** page.

Manage Requests Create New Process Requests Quick Search Budget Insight Purchase Requests

Purchase Orders Pending Transmission | Global Group

[Query](#) [Actions](#) [Preferences](#) Search:

<input type="checkbox"/>	Order No. ▲	Requestor	Vendor Name	Ship To	Status	Total Invoiced Net Amount(In Percentage)	Needed By
<input type="checkbox"/>	16	Brown, Terry L.	Concave	Company Location One	Pending Transmission	0 %	
<input type="checkbox"/>	17	Brown, Terry L.	Simpre Associates	Company Location One	Pending Transmission	0 %	

View Original Invoice or Purchase Request Associated with a PO

To view the original payment or purchase request associated with a specific purchase order, click **View Associations**.

Process Purchase Requests Process Purchase Orders

[View Image](#) | [View Associations](#) | [Audit Trail](#)

Purchase Order 10

Pending Transmission

Requested by Smith, John

[Transmit](#) [Preview](#) [Actions](#)

Purchase Order Details | [Edit](#)

PO Number: 10

Name:

Vendor

1234

123 Main Street
Bellevue, WA
98004

Vendor Code: BDA4F797BED64B21855631A2CF9B8

The **Purchase Order Associations** window appears with information about the associated payment and purchase order requests of the purchase order.

Purchase Order Associations						
PO Number 1		PO Total 900.00 USD				
Currency US, Dollar		PO Tax 0.00 USD				
Associated Payment Requests						
Invoice Number	Request Name	Employee Name	Invoice Date ▲	Tax	Shipping	Total
9898	Sonny Pho	Brown, Terry L.	06/08/2015	0.00	0.00	450.00
3322	Chun Lee	Brown, Terry L.	06/10/2015	0.00	0.00	1,800.00
Associated Purchase Requests						
Purchase Request Number	Description	Employee Name	Submit Date ▲	Total		
6	cssc	Brown, Terry L.	05/06/2015	450.00		
Close						

NOTE: Depending on your user permission role, you might be able to click on the associated invoice and/or purchase request number to see the related record.

APPROVAL FLOW AVAILABLE TO VIEW WITHIN PURCHASE ORDER

The purchasing admin can double-click the purchase request in the **Purchase Order Association** window to view the approval flow of a purchase request within a purchase order.

Approval Flow for Purchase Request: Office chair replacement				
Sequence	Step	Approver	Date	Final Status
1	Manager Approval	Brown, Terry L.	03/11/2015	Approved
2	PR Audit			
Close				

Review the Audit Trail

To review the audit trail, click **Audit Trail**.

Request Items
Process Purchase Requests

View Image Gallery | View Associations | **Audit Trail**

PURCHASE ORDER RV2

Transmitted to Vendor
Requested by Miller, Chris

Transmit
Preview
Actions

Purchase Order Details

Edit

PO Number: RV2
Name:
Description:
Net Payment 30
Terms:
Order Date: 10/11/2016
Need By Date: 10/31/2016

Vendor

Praliner Company
123 Main Street
Bellevue, WA
98004
Vendor Code: 12345
Address Code: 12345
Currency: USD-US, Dollar
View Details | Edit

The **Audit Trail** window appears with information about actions that the purchasing admin has taken on the specific purchase order.

Audit Trail			
Date/Time	Updated By	Action	Description
10/11/2016 12:23 PM	Miller, Chris	Purchase Order Transmit	Purchase Order Transmitted. Status changed from "Pending Transmi... Attachments: (cb9b61367998d1cc7f8e) No of Attachments : (1)
Close			

NOTE: All users who have access to a PO change order transaction will be able to view the audit trail history of the PO Change Order.

Audit Trail			
Date/Time	Updated By	Action	Description
03/14/2017 10:03 AM	Brown, Terry	Change Order Request Approv...	Change Order Request Approved and Purchase Order got updated
03/14/2017 09:34 AM	Collins, Chris	Change Order Request Initiated	Change Order Request Initiated
08/27/2015 07:15 AM	Administrator, Concur	Purchase Order Transmit	Purchase Order Transmitted. Status changed from "Pending Transmission" to "Tran... Attachments: () No of Attachments : ()
Close			

Preview a Purchase Order

The purchasing admin has a unique view of the overall PR to PO creation by being able to view a PDF of the final purchase order, as it will appear to the vendor on receipt via email. This view allows the purchasing admin to verify information in a single view, including address, email, and comments to the vendor.

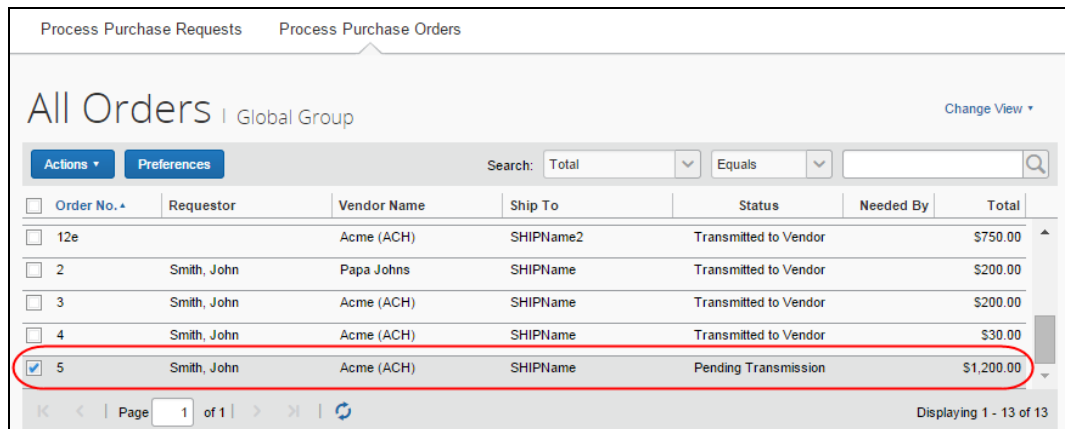
In addition, purchasing admins can view all documents that are associated with a specific purchase order, which gives them an overview of all documents that they transmit to a vendor.

This includes documents uploaded by:

- Administrators who configure purchase orders in PO Configuration
- Users who create purchase requests and select the **Include in PO Transmission** option
- Approvers who approve purchase requests and select the **Include in PO Transmission** option
- Purchasing admins who process purchase requests and select the **Include in PO Transmission** option

► To preview a purchase order in PDF format:

1. On the **All Orders** page, double-click the purchase order that you want to view.



Order No.	Requestor	Vendor Name	Ship To	Status	Needed By	Total
12e		Acme (ACH)	SHIPName2	Transmitted to Vendor		\$750.00
2	Smith, John	Papa Johns	SHIPName	Transmitted to Vendor		\$200.00
3	Smith, John	Acme (ACH)	SHIPName	Transmitted to Vendor		\$200.00
4	Smith, John	Acme (ACH)	SHIPName	Transmitted to Vendor		\$30.00
5	Smith, John	Acme (ACH)	SHIPName	Pending Transmission		\$1,200.00

Section 5: What the Purchasing Admin Can Do

2. Click **Preview**.

Process Purchase Requests | Process Purchase Orders

[View Image](#) | [View Associations](#) | [Audit Trail](#)

Purchase Order 5

Pending Transmission
Requested by Smith, John

[Transmit](#) [Preview](#) [Actions](#)

Vendor
1234

The **Preview Purchase Order** window appears.

Preview Purchase Order

Email Details

From: PurchaseOrder_DoNotReply@ConcurSolutions.com

To: Vendor_1@vendor_1.com

Subject: CPYA7 from CompanyA

Body: Please review the attached Purchase Order. Thanks!

* You can enter multiple TO Addresses separated by a Semicolon ;

PURCHASE ORDER

COMPANY

CompanyA
123 Main Street
Anytown, WA, 55555
UNITED STATES

VENDOR:
Vendor 1
A672B169333E48A1ABE0087E4172BCFA
123 Main Street
Anytown, WA
555-555-5555
UNITED STATES

SHIP TO:
Susan Common
CompanyB
345 Main ST
Anytown, 55555
UNITED STATES

BILL TO:
CompanyB
345 Main ST
Anytown, 55555
UNITED STATES

PO Number: CPYA7
Order Date: 12/2/2021
Needed By: 9/25/2019
Net Payment Terms: 30
Ship To Attn: Common, Susan
Shipping: \$0.00
Tax: \$0.00
Total: \$600.00
Currency: USD
Notes To Vendor: Deliver to 2nd floor reception via freight elevator in back of building.

NO.	Supplier Part ID	Description	Quantity	Unit Price	Subtotal
1		Table	1.00 Each	\$525.00	\$525.00
2		Chair	1.00 Each	\$75.00	\$75.00
SUBTOTAL					\$600.00
SHIPPING					\$0.00
TAX					\$0.00
TOTAL					\$600.00

INSTRUCTIONS
Deliver to 2nd floor reception via freight elevator in back of building.

The purchasing admin can correct selected items in the **Preview Purchase Order** window, and add one or more additional email addresses as needed. If multiple email addresses exist, vendors will see all other contacts who received the email by looking at the **To** line of their email. This helps prevent multiple vendor contacts from fulfilling the same purchase order.

To change any PO data presented in the PDF, the purchasing admin opens the actual PO and edits the fields. The purchasing admin can also email the PO from this window by clicking **Transmit**.

The client administrator can change the default text (Body text, address, instructions, etc.) in the **PO Configuration** step of Setup.

The processor can change the prefix for the **From** address but cannot change the suffix of the address from "_DoNotReply@ConcurSolutions.com".

Preview a PO Change Order

Once a PO change order has gone through the workflow and has been fully approved, the PO processor will be able to open the **Preview Purchase Order** window view information about the revision number and revision date of the last revision, new line items, and updated amount of the PO change order.

Preview Purchase Order

Email Details

From:

PurchaseOrder _DoNotReply@ConcurSolutions.com

To:

Vendor_1@vendor_1.com

Subject:


CPYA7 from CompanyA

Body:

Please review the attached Purchase Order. Thanks!

* You can enter multiple TO Addresses separated by a Semicolon ;

Next



PURCHASE ORDER

CompanyA

123 Main Street

Anytown, WA, 55555

UNITED STATES

VENDOR:

Vendor_1

A672B169333E48A1ABE0D87E41728CFA

123 Main Street

Anytown, WA

555-555-5555

UNITED STATES

SHIP TO:

Susan Common

CompanyB

345 Main ST

Anytown, 55555

UNITED STATES

BILL TO:

CompanyB

345 Main ST

Anytown, 55555

UNITED STATES

PO Number:

CPYA7

Order Date:

12/2/2021

Needed By:

9/25/2019

Net Payment Terms:

30

Ship To Attn:

Common, Susan

Shipping:

\$0.00

Tax:

\$0.00

Total:

\$600.00

Currency:

USD

Notes To Vendor:

Deliver to 2nd floor reception via freight elevator in back of building.

NO.	Supplier Part ID	Description	Quantity	Unit Price	Subtotal
1		Table	1.00 Each	\$575.00	\$575.00
2		Chair	1.00 Each	\$15.00	\$15.00
SUBTOTAL					\$600.00
SHIPPING					\$0.00
TAX					\$0.00
TOTAL					\$600.00

INSTRUCTIONS

Deliver to 2nd floor reception via freight elevator in back of building.

Section 5: What the Purchasing Admin Can Do

The PO processor can also view a **Change Order Revision** section of the purchase order PDF with revision information.

Preview Purchase Order

Email Details

From: PurchaseOrder_DoNotReply@ConcurSolutions.com

To:

Subject: 3 from Corp

Body:

Change Order Revisions

Revision: 2
Transmitted Date:

Description	NO.	Supplier Part ID	Quantity	Unit Price	Subtotal
Support	3		1.00	\$100.00	\$100.00
SUBTOTAL:					\$100.00
SHIPPING:					\$0.00
TAX:					\$0.00
TOTAL:					\$100.00

Revision: 1
Transmitted Date: 3/9/2017

Description	NO.	Supplier Part ID	Quantity	Unit Price	Subtotal
Maintenance	2		1.00	\$200.00	\$200.00
SUBTOTAL:					\$200.00
SHIPPING:					\$0.00
TAX:					\$0.00
TOTAL:					\$200.00

Transmit Close

Transmit Purchase Order to the Vendor

To transmit a purchase order to the vendor, click **Transmit**.

Request Items | Process Purchase Requests | Process Purchase Orders

[View Image Gallery](#) | [View Associations](#) | [Audit Trail](#)

PURCHASE ORDER RV2

Transmitted to Vendor
Requested by Miller, Chris

Transmit Preview Actions

Purchase Order Details | Edit

PO Number: RV2
Name:
Description:
Net Payment: 30
Terms:
Order Date: 10/11/2016
Need By Date: 10/31/2016
Shipping: 0.00
Tax: 0.00
Total: 900.00
Currency: US, Dollar

Vendor
Praliner Company
123 Main Street
Bellevue, WA
98004
Vendor Code: 12345
Address Code: 12345
Currency: USD-US, Dollar
[View Details](#) | [Edit](#)

Ship To
Chokladpraliner
12 Main Street
Seattle, UNITED STATES
98077
Address Code: 1234
[Edit](#)

Bill To
Chokladpraliner
12 Main Street
Seattle, UNITED STATES
98077
Address Code: 1234
[Edit](#)

Itemization Summary


Line Nu...	Expense Type	Supplie...	Descrip...	Unit Of ...	Quantity	Unit Price	Subtotal
1	Printing and Duplication	12456134	Setu Chair	Each	90	10	\$900.00
	Account Code	Distribution Code	Percentage		Net Amount	Gross Amount	
	21000 [System Default]		100		\$900.00	\$900.00	

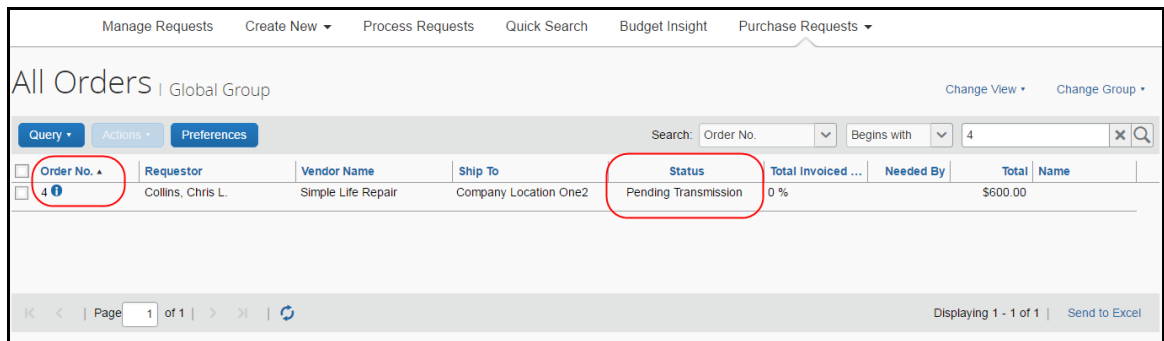
Automatically Transmit Purchase Orders

The client administrator may enable (select) an option in the Setup Wizard, which removes a workflow step in the purchase order process. In this case, Concur Invoice will transmit purchase orders from the processed purchase request directly to the supplier.

NOTE: If the purchase order contains incorrect data, such as an incorrect vendor email address, Concur Invoice will not transmit the purchase order automatically, but instead it will require manual PO processing.

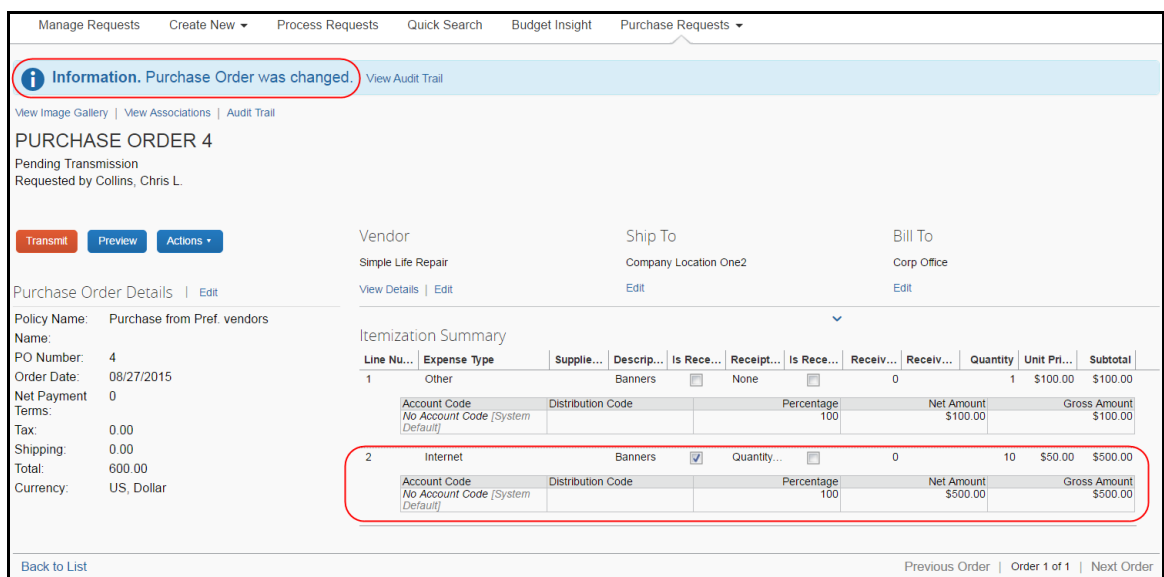
Transmit a Change Order

When the purchase request processor has approved the purchase request, the PO processor will be able to see an updated purchase order with a *Pending Transmission* status in the processor view. They will also be able to tell that the purchase order is a change order by the  icon that is visible by the order number.



Order No.	Requestor	Vendor Name	Ship To	Status	Total Invoiced ...	Needed By	Total	Name
4	Collins, Chris L.	Simple Life Repair	Company Location One2	Pending Transmission	0 %		\$600.00	

The PO processor can open the purchase order to see the newly added line item(s) and a notification that the purchase order has changed.



Information. Purchase Order was changed. [View Audit Trail](#)

PURCHASE ORDER 4
Pending Transmission
Requested by Collins, Chris L.

[Transmit](#) [Preview](#) [Actions](#)


Vendor: Simple Life Repair | Ship To: Company Location One2 | Bill To: Corp Office

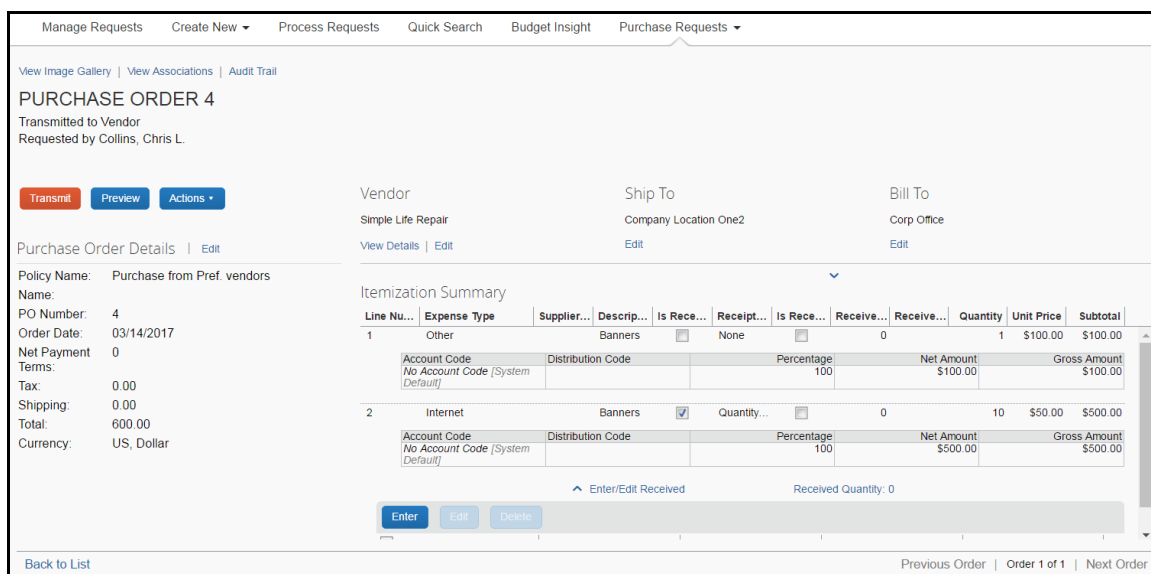
Itemization Summary

Line Nu...	Expense Type	Supplie...	Descrip...	Is Rece...	Receipt...	Is Rece...	Receiv...	Quantity	Unit Pri...	Subtotal
1	Other		Banners	<input type="checkbox"/>	None	<input type="checkbox"/>	0	1	\$100.00	\$100.00
	Account Code	Distribution Code		Percentage					Net Amount	Gross Amount
	No Account Code [System Default]			100					\$100.00	\$100.00
2	Internet		Banners	<input checked="" type="checkbox"/>	Quantity...	<input type="checkbox"/>	0	10	\$50.00	\$500.00
	Account Code	Distribution Code		Percentage					Net Amount	Gross Amount
	No Account Code [System Default]			100					\$500.00	\$500.00

[Back to List](#) [Previous Order](#) [Order 1 of 1](#) [Next Order](#)

Section 5: What the Purchasing Admin Can Do

When the PO processor has reviewed the updates of the purchase order, they click **Transmit**. Once the purchase order has been transmitted, all the  icons disappear that are associated with that specific purchase order.



The screenshot displays the 'PURCHASE ORDER 4' interface. At the top, there are navigation tabs: 'Manage Requests', 'Create New', 'Process Requests', 'Quick Search', 'Budget Insight', and 'Purchase Requests'. Below the tabs, there are links for 'View Image Gallery', 'View Associations', and 'Audit Trail'. The main header shows 'PURCHASE ORDER 4' with subtext 'Transmitted to Vendor' and 'Requested by Collins, Chris L.'. On the left, there are buttons for 'Transmit', 'Preview', and 'Actions'. Below these are 'Purchase Order Details' and an 'Edit' link. The details section includes fields for 'Policy Name' (Purchase from Pref. vendors), 'Name', 'PO Number' (4), 'Order Date' (03/14/2017), 'Net Payment Terms' (0), 'Tax' (0.00), 'Shipping' (0.00), 'Total' (600.00), and 'Currency' (US, Dollar). On the right, there are sections for 'Vendor' (Simple Life Repair), 'Ship To' (Company Location One2), and 'Bill To' (Corp Office), each with a 'View Details' or 'Edit' link. Below these is the 'Itemization Summary' table. The table has columns: 'Line Nu...', 'Expense Type', 'Supplier...', 'Descrip...', 'Is Rece...', 'Receipt...', 'Is Rece...', 'Receive...', 'Received...', 'Quantity', 'Unit Price', and 'Subtotal'. It shows two lines: Line 1 for 'Other' with a subtotal of \$100.00, and Line 2 for 'Internet' with a subtotal of \$500.00. At the bottom, there are buttons for 'Enter', 'Edit', and 'Delete', and a 'Back to List' link.

Line Nu...	Expense Type	Supplier...	Descrip...	Is Rece...	Receipt...	Is Rece...	Receive...	Received...	Quantity	Unit Price	Subtotal
1	Other		Banners	<input type="checkbox"/>	None	<input type="checkbox"/>		0	1	\$100.00	\$100.00
<div>Account Code: No Account Code [System Default] Distribution Code: Percentage: 100 Net Amount: \$100.00 Gross Amount: \$100.00</div>											
2	Internet		Banners	<input checked="" type="checkbox"/>	Quantity...	<input type="checkbox"/>		0	10	\$50.00	\$500.00
<div>Account Code: No Account Code [System Default] Distribution Code: Percentage: 100 Net Amount: \$500.00 Gross Amount: \$500.00</div>											

Manage Receipts and Receipt Images

Purchasing Administrators, who work with the Receiving feature, can add, edit, delete receipts and receipt images of the transmitted purchase order.

NOTE: If a receipt is associated with an invoice, a user will not be able to edit or delete the receipt and the **Edit** and **Delete** buttons will be disabled. If a user needs to make changes to an invoice, they need to first unassociated the receipt to the invoice.



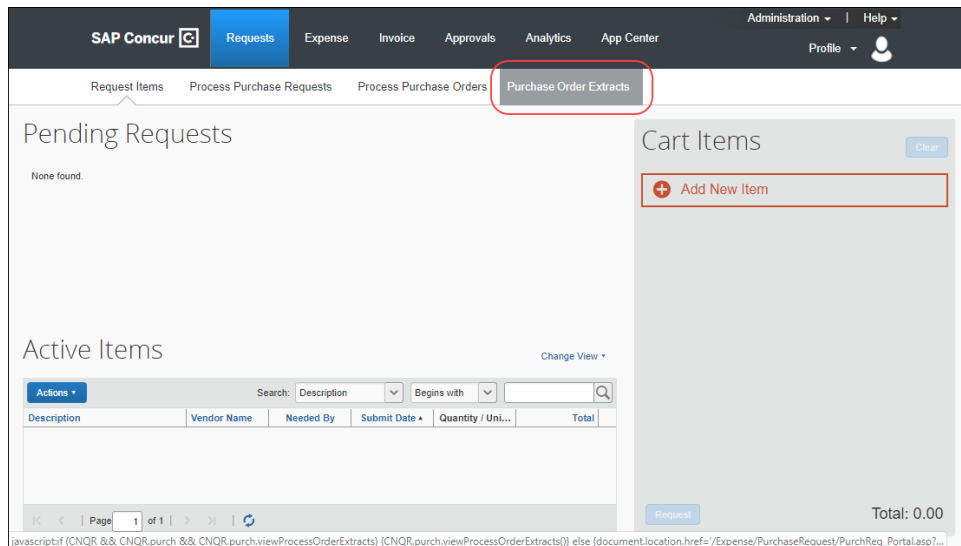
For more information, refer to the *Concur Receiving* section of the *Concur Invoice: Purchase Order Matching User Guide*.

Extract Purchase Orders

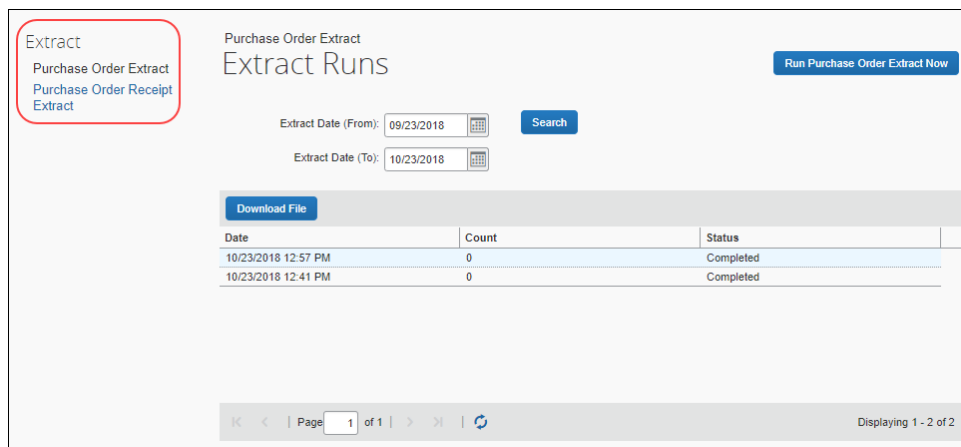
The **Purchase Order Extracts** page enables the Purchasing Admin to run an on-demand job to extract purchase order or purchase order receipt data from the Concur Invoice system. After the data is extracted, clients can download the data and then import it into their system of record so that the inventory values reflect the quantities received.

► **To extract purchase orders:**

1. Click **Requests > Purchase Order Extracts**.



2. On the Extract menu, click **Purchase Order Extract**.

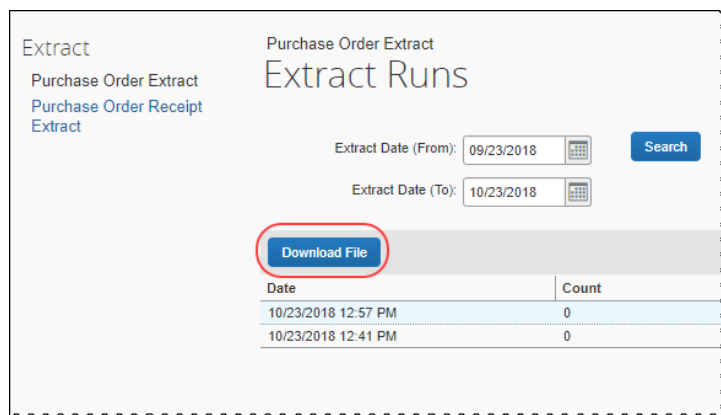


3. Click the **Run Purchase Order Extract Now** button to start the extract.

Download and Search for Purchase Order Extracts

Once the data has been extracted, the extract can be downloaded as a pipe-delimited text file.

To download the extracted data, select the row for the extract you want to download, and then click **Download File**. The file is downloaded to the default download location for the local machine.



Extract
Purchase Order Extract
Purchase Order Receipt
Extract

Purchase Order Extract
Extract Runs

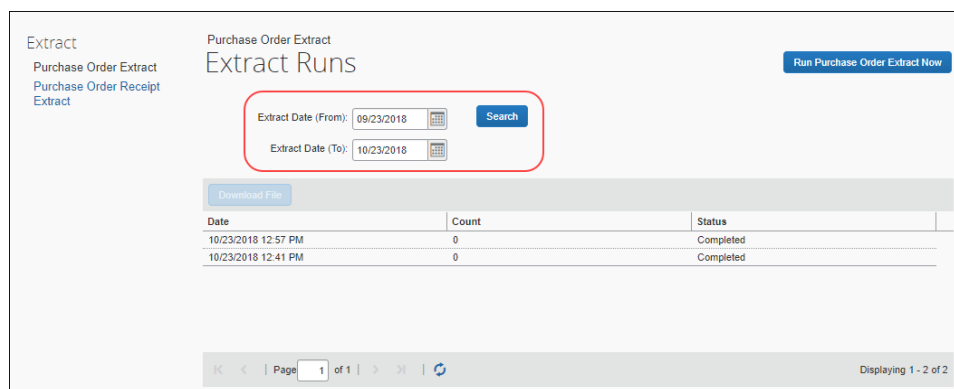
Extract Date (From): 09/23/2018

Extract Date (To): 10/23/2018

Download File

Date	Count
10/23/2018 12:57 PM	0
10/23/2018 12:41 PM	0

You can also search for previously generated extracts by setting a range of dates in the **Extract Date (From)** and **Extract Date (To)** fields, and then clicking **Search**.



Extract
Purchase Order Extract
Purchase Order Receipt
Extract

Purchase Order Extract
Extract Runs

Extract Date (From): 09/23/2018

Extract Date (To): 10/23/2018

Date	Count	Status
10/23/2018 12:57 PM	0	Completed
10/23/2018 12:41 PM	0	Completed

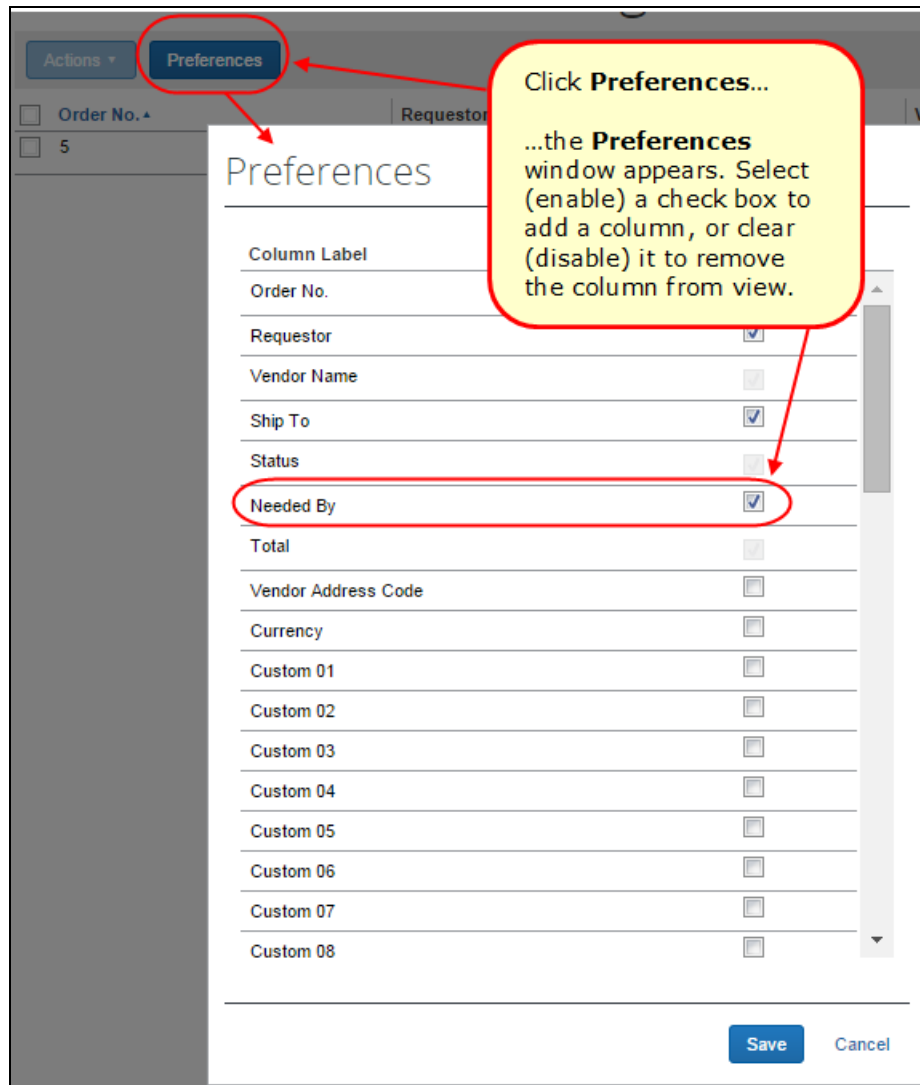
Page 1 of 1 | | Displaying 1 - 2 of 2

Section 6: Configure Column and Fields Set View

The approver and purchasing admin working with either purchase orders or purchase requests can arrange the column view to include and exclude fields, and arrange the sequence in the order they want.

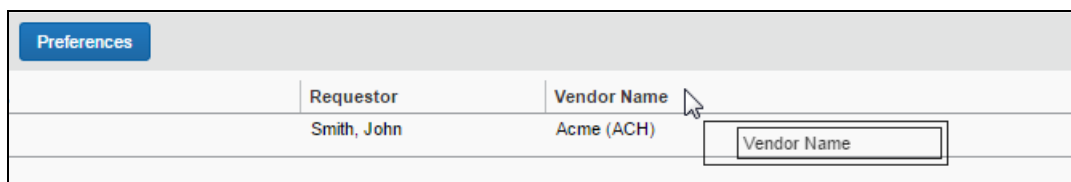
Add, Delete, and Move Columns

First, click **Preferences** to open the **Preferences** window, and then select or clear the check boxes next to those fields you want to add or remove.



Rearrange Columns

A simple drag-and-drop action lets you grab the column heading, and then move it to a new location in the list view.



Preferences	
Requestor	Vendor Name
Smith, John	Acme (ACH)
	Vendor Name

