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| Mobile App User Guide  Concur ExpenseIt  **Last Revised: August 17, 2023** | This guide describes the current version, which is shown on the "[Introduction](https://www.concurtraining.com/customers/tech_pubs/MobileDocs/_MOBdoc_CCC.htm)" guide. | | Applies to these mobile devices:  Yes: iPhone  Yes: iPad  Yes: Android |
| **IMPORTANT:** Be aware that your company's configuration may not allow for all of the features described here. Generally, if a feature is not available in your configuration of the web version of SAP Concur, then it is not available in the mobile app. | | | |
| Concur ExpenseIt, in the SAP Concur mobile app, is a value-added service that turns receipts into expense line items and sends them directly into Concur Expense. It makes submitting receipts, creating expense reports, and getting reimbursed quicker and easier by doing a lot of the work for the user. | | | [Concur ExpenseIt 2](#_Toc143172889)  [iPhone 2](#_Toc143172890)  [Convert Receipts into Expenses 2](#_Toc143172891)  [On-Device Receipt Recognition 5](#_Toc143172892)  [Use of Delegate Function to Add Expenses 6](#_Toc143172893)  [Android 10](#_Toc143172894)  [Convert Receipts into Expenses 10](#_Toc143172895)  [On-Device Receipt Recognition 11](#_Toc143172896)  [Use of Delegate Function to Add Expenses 13](#_Toc143172897)  [iPad 16](#_Toc143172898)  [Convert Receipts into Expenses 16](#_Toc143172899)  [On-Device Receipt Recognition 20](#_Toc143172900)  [Use of Delegate Function to Add Expenses 22](#_Toc143172901) | |
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**Please Note:**

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

## Concur ExpenseIt

If a user's company uses ExpenseIt, they can manage their expenses start to finish. The SAP Concur mobile app will turn their receipts into expense entries and then send them directly into Concur Expense.

## iPhone

### Convert Receipts into Expenses

| Screen(s) | Description/Action |
| --- | --- |
|  | To turn your receipts into expenses:  1) Tap the camera icon to capture a receipt when ExpenseIt is enabled.  2) Take a picture of the receipt. SAP Concur analyzes the receipt information.  3) The bottom left shows the already created receipts. The bottom right shows how many receipts are waiting to be saved.  4) If **Auto** is enabled, images will be captured automatically. |
|  | 5) When taking several images in a row, select **Combine into Single Expense** or **Separate Expenses.** |
|  | 6) When the analysis is complete, open the receipt, attach to a report, edit as necessary, etc.  7) When done, tap **Move To Report**. |
|  | 8) Saved receipts must be uploaded through the **Expense** tab on the home screen and then by tapping  and selecting **Upload Photo**. |

### On-Device Receipt Recognition

#### Automatically Detect Receipt Amount

| Screen(s) | Description/Action |
| --- | --- |
|  | To convert a receipt amount automatically in ExpenseIt:  1) On the home screen, tap **ExpenseIt**.  2) On the **Confirm Amount** screen, either:   * Tap the amount. *-or-* * Tap **Incorrect**, to enter an appropriate amount. |

#### Manually Enter the Correct Receipt Amount

| Screen(s) | Description/Action |
| --- | --- |
|  | To manually enter the correct receipt amount:  1) On the **Confirm Amount** screen, tap **Incorrect**.  2) On the **Enter Amount** screen, enter the appropriate amount and tap **Use** when finished.  3) On the **Finalise** screen, either:   * Tap **Next receipt** to go to the next receipt.*-or-* * Tap**Done** to finish**.** |

### Use of Delegate Function to Add Expenses

| Screen(s) | Description/Action |
| --- | --- |
|  | To add expenses on behalf of another user:  1) Ensure that you are acting as another user. This is indicated by the green banner at the top of the screen. Once enabled, you will automatically be directed to the **Expenses** screen. |
|  | 2) Click the plus iconand the **ExpenseIt** option will appear. Tap this option and you will be able to select the receipt to be added as an expense. By tapping **Done**, you will be re-directed to to the **Expenses** list where you will see the uploaded receipt being processed. |

#### Stop Using Delegate Function

| Screen(s) | Description/Action |
| --- | --- |
|  | To stop acting on behalf another user:  1) To **stop** acting on behalf of another user, tap the green banner where it is visible that you are acting as another user. In the pop up that appears, select **Stop.**  2) Once you tap **Stop** this message is automatically dismissed and the green banner also disappears. You now regains access to the usual features. |

**Note:** The Delegate Function is currently only available for GRDC users who are ExpenseIt enabled. Once uploaded, expenses cannot be edited within the Mobile App. Only deleted and re-uploaded. Or, the user or delegate can edit the expense on the web.

#### Using Delegate Function to Edit Expenses

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

## Android

### Convert Receipts into Expenses

| Screen(s) | Description/Action |
| --- | --- |
|  | To turn your receipts into expenses:  1) Tap the camera icon to launch ExpenseIt. |
| When taking a picture of a receipt in the mobile app,, it automatically zooms in on the receipt.  Preview Image - Tap Use to use the receipt image or tap Retake to retake the receipt image. | 2) Take a picture of the receipt. SAP Concur analyzes the receipt information. |
| Expenses - After the mobile app analyzes the receipt image, tap the receipt to open it. Expense - After making the desired edits to the receipt, tap Move to Claim. | 3) When the analysis is complete, open the receipt, attach to a report, edit as necessary, etc.  4) When done, tap **Move To Claim**. |

### On-Device Receipt Recognition

#### Automatically Detect Receipt Amount

| Screen(s) | Description/Action |
| --- | --- |
|  | To convert a receipt amount automatically in ExpenseIt:  1) On the home screen, tap **ExpenseIt**.  2) On the **Confirm Amount** screen, either:   * Tap the amount. *-or-* * Tap **Incorrect**, to enter an appropriate amount. |

#### Manually Enter the Correct Receipt Amount

| Screen(s) | Description/Action |
| --- | --- |
| Enter Amount - With the receipt open, enter the correct receipt amount and tap Use. Finalise - With the receipt open, tap Next receipt to add another receipt or - if finished - tap Done. | To manually enter the correct receipt amount:  1) On the **Confirm Amount** screen, tap **Incorrect**.  2) On the **Enter Amount** screen, enter the appropriate amount and tap **Use** when finished.  3) On the **Finalise** screen, either:   * Tap **Next Receipt** to go to the next receipt.*-or-* * Tap**Done** to finish**.** |

### Use of Delegate Function to Add Expenses

| Screen(s) | Description/Action |
| --- | --- |
|  | To add expenses on behalf of another user:  1) Tap the **Menu** button and then tap **Act as Another User.** Once the user you wish to act on behalf of is selected, it will be indicated by a green banner. You will also be directed to the **Expenses** Screen. |
|  | 2) Tap the **Add** button and the **ExpenseIt** option will appear. Tap this option and you will be able to select the receipt to be added as an expense. Once selected, you will be redirected to the Receipt to confirm it. It will then appear in your **Expenses** List. |
|  | 3) To Delete an Expense, swipe on the Expense you want to Delete from the list. Tap the **Trash Can** Icon. A message will appear at the bottom of the screen to confirm the selected is now deleted. |

#### Stop Using Delegate Function

| Screen(s) | Description/Action |
| --- | --- |
|  | To stop acting on behalf another user:  1) Tap the **green banner,** where it is displayed who you are acting on behalf of. From here, you can stop acting on behalf of this user, or, change the user you are acting on behalf of.  2) Once you tap **Stop** this message is automatically dismissed and the green banner also disappears. You now regains access to the usual features.  3) From here, you can also choose to **Act As Another User**. |

**Note:** The Delegate Function is currently only available for GRDC users who are ExpenseIt enabled. Once uploaded, expenses cannot be edited within the Mobile App. Only deleted and re-uploaded. Or, the user or delegate can edit the expense on the web.

## iPad

### Convert Receipts into Expenses

| Screen(s) | Description/Action |
| --- | --- |
| Tap Use to use the receipt image or tap Retake to retake the receipt image. | To turn your receipts into expenses:  1) On the home screen, tap **ExpenseIt**.  2) Take a picture of the receipt. SAP Concur analyzes the receipt information. |
|  | 3) When the analysis is complete, open the receipt, attach to a report, edit as necessary, etc. |
|  | 4) When done, tap **Move To Report**. |
| After capturing all the appropriate receipts tap Done or Cancel. | 5) After capturing all the appropriate receipts, tap either:   * **Done** – *or* – * **Cancel** |

### On-Device Receipt Recognition

#### Automatically Detect Receipt Amount

| Screen(s) | Description/Action |
| --- | --- |
|  | To convert a receipt amount automatically in ExpenseIt:  1) On the home screen, tap **ExpenseIt**.  2) On the **Confirm Amount** screen either:   * Tap the amount. *-or-* * Tap **Incorrect** to enter an appropriate amount. |

#### Manually Enter the Correct Receipt Amount

| Screen(s) | Description/Action |
| --- | --- |
|  | To manually enter the correct receipt amount:  1) On the **Confirm Amount** screen, tap **Incorrect**.  2) On the **Enter Amount** screen, enter the appropriate amount and tap **Use** when finished.  3) On the **Finalise** screen, either:   * Tap **Next receipt,** to go to the next receipt.*-or-* * Tap**Done**,to finish**.** |

## Use of Delegate Function to Add Expenses

| Screen(s) | Description/Action |
| --- | --- |
|  | To add expenses on behalf of another user:  1) Ensure that you are acting as another user. This is indicated by the green banner at the top of the screen. Once enabled, you will automatically be directed to the **Expenses** screen. |
|  | 2) Click the Add button and the ExpenseIt option will appear. Tap this option and you will be able to select the receipt to be added as an expense. By tapping Done, you will be re-directed to to the Expenses list where you will see the uploaded receipt being processed. |

#### Stop Using Delegate Function

| Screen(s) | Description/Action |
| --- | --- |
|  | To stop acting on behalf another user:  1) To **stop** acting on behalf of another user, tap the green banner where it is visible that you are acting as another user. In the pop up that appears, select **Stop.**  2) Once you tap **Stop** this message is automatically dismissed and the green banner also disappears. You now regains access to the usual features. |

#### Using Delegate Function to Edit Expenses

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

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