

Concur Invoice QuickStart Guide



SAP Concur
Technologies
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Invoice

Expense

Travel

Request

Risk Messaging

SAP Concur for Mobile

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601 108th Avenue, NE, Suite 1000
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Welcome to Concur Invoice

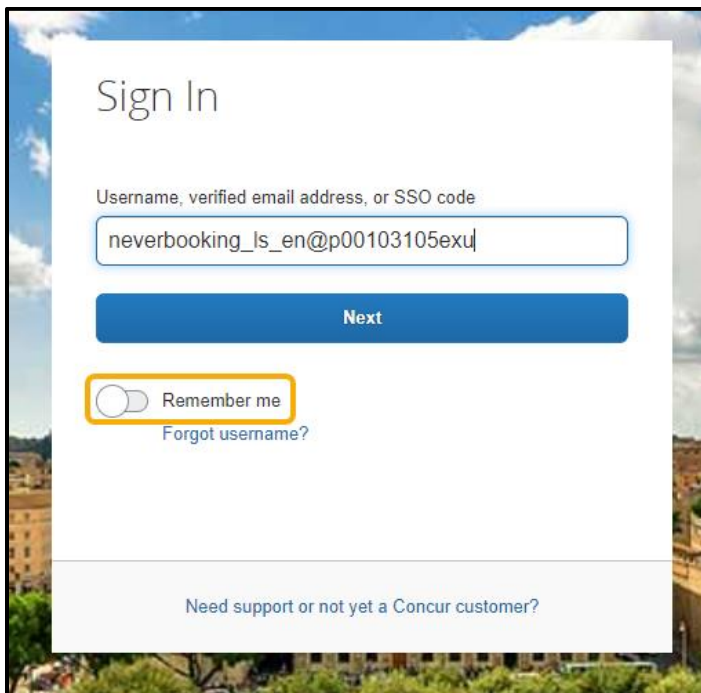
Concur Invoice is a cloud-based tool that integrates invoices with T&E payments within a single system. Concur Invoice gives you one view to manage all your business spend – from purchase request through payment.

To sign in to Concur Invoice

1. To sign into SAP Concur, on the **Sign In** screen, enter your **Username**, and then select **Next**.

If you have forgotten your username, select the **Forgot username?** link.

You can slide the **Remember me** toggle button to store your password, so that you don't have to enter it the next time you sign in to SAP Concur from this device.



2. Enter your **Password**.

If this is your initial log in to SAP Concur, enter the temporary password that was provided to you.

If you have forgotten your password, select the **Forgot password?** link.

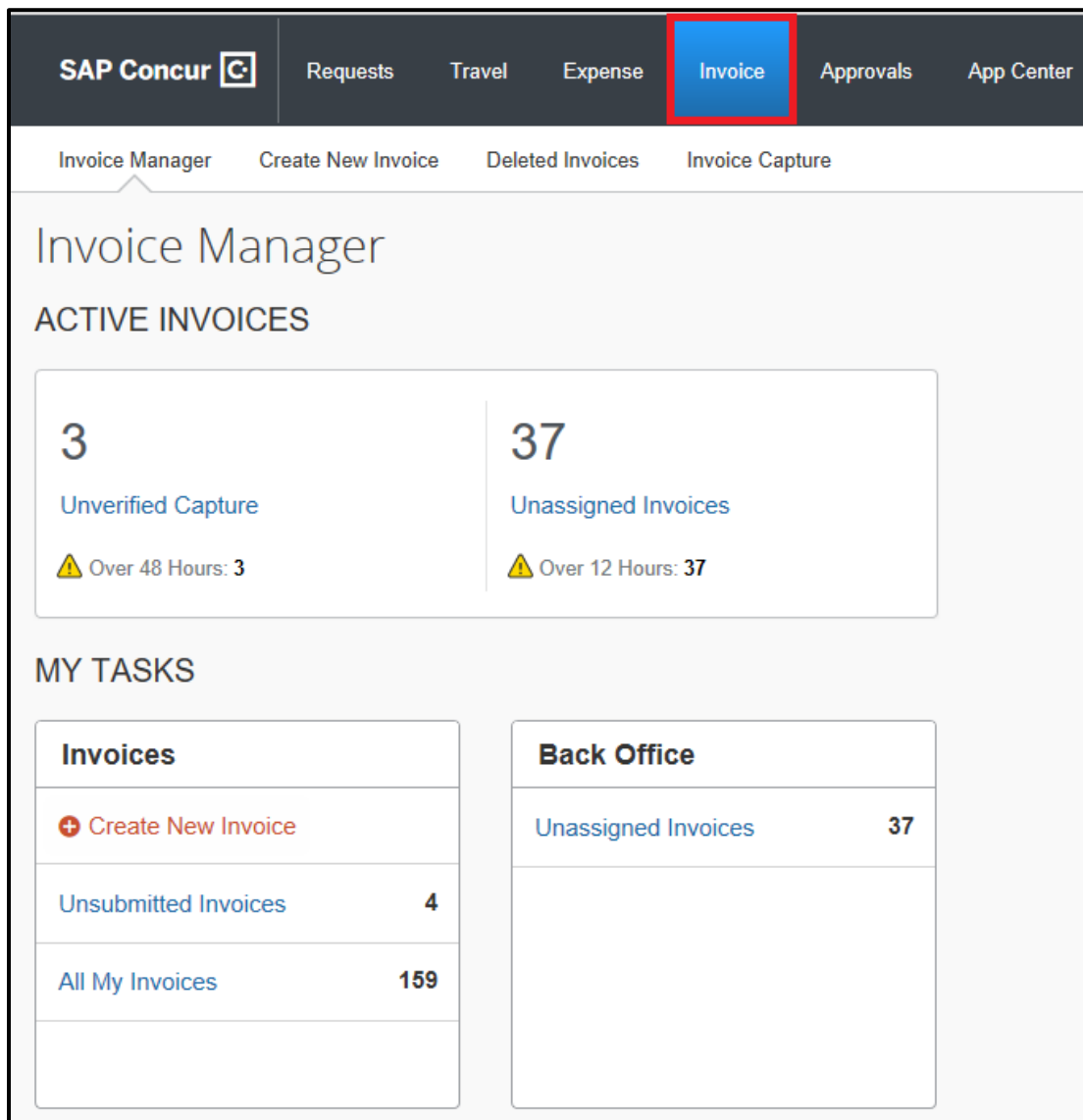
3. Select **Sign In**.


Notes:

- Log on to SAP Concur following your company's logon instructions.
- Your password is case sensitive.
- If you are not sure how to log on, check with your company's administrator.

Accessing Concur Invoice

On the **SAP Concur** home page, on the menu bar, from the menu bar, select **Invoice** to manage your invoices.





SAP Concur 

Requests Travel Expense **Invoice** Approvals App Center


Invoice Manager Create New Invoice Deleted Invoices Invoice Capture

Invoice Manager

ACTIVE INVOICES

3 Unverified Capture  Over 48 Hours: 3	37 Unassigned Invoices  Over 12 Hours: 37
---	--

MY TASKS

Invoices	Back Office
 Create New Invoice	Unassigned Invoices 37
Unsubmitted Invoices 4	
All My Invoices 159	

Creating a Purchase Request

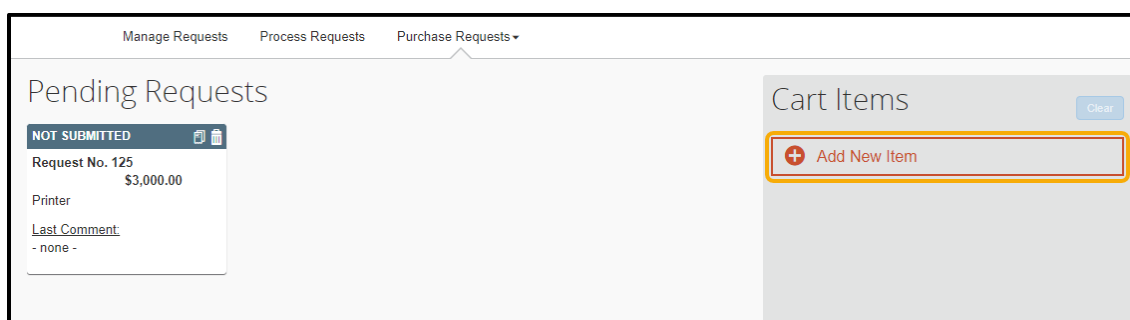
You use purchase requests to obtain approval on upcoming purchases. These requests then become purchase orders, which authorize suppliers to provide goods and services at specified prices.

To create a purchase request

1. On the **SAP Concur** home page, from the menu, select **Requests**.
2. From the **Purchase Request** dropdown menu, select **Request Items**.

When creating a purchase request, you begin by adding the items that you want in the request. The resulting list of goods and services is then combined into a request.

3. In the **Cart Items** section, select **Add New Item**.




4. Select the **Type** dropdown arrow to select whether this request is for **Goods** or **Services**.
5. Enter the name of an existing vendor or search for and select a vendor from the saved list.
– Or –
Select the **Request New Vendor** link to enter the details for a new vendor.
6. If you request a new vendor, enter the appropriate vendor details, and then select **Apply**.
7. After you enter all the vendor information, select **OK**.
A purchase request can contain several different vendors for specific line items. Multiple purchase orders are generated based on the vendors that you specify.
8. Complete the required fields (indicated with a red bar) and optional fields as directed by your company.
Note: Depending on the goods that you are requesting to purchase, you can change the **Unit of Measure** to automatically calculate the **Total** based on the **Quantity** and **Unit Price** entered.
9. Select **Save**.

Items that are pending a purchase request appear in the **Cart Items** section. After you add all your items, you can create the purchase request.

10. Select **Request**.

Pending Requests


NOT SUBMITTED 

Request No. 125
\$3,000.00


Printer

[Last Comment](#)
- none -

Active Items Change View ▾

Actions ▾ Search: Begins with 

Description	Vendor Name	Needed By	Submit Date	Quantity / Unit...	Total
Office Supplies	Office Depot	04/02/2014	03/21/2014	10 Each @ 45	\$450.00
Request No.: 7 (Vendor Approval) Purchase Order No.: 10 (Pending Transmission)					
Office Chairs	Staples	04/16/2015		2 Each @ 198	\$396.00
Request No.: 16 (Approved) Purchase Order No.: 29 (Pending Transmission)					
Mobilier de bureau	Vendor A	05/11/2015		2 Each @ 125	€ 250.00
Request No.: 19 (Approved) Purchase Order No.: 55 (Pending Transmission)					
办公用品	Staples	05/29/2015		1 Each @ 0	\$0.00
Request No.: 24 (Pending Transmission)					

Page 1 of 1  Displaying 1 - 15 of 15

Cart Items Clear

+ Add New Item

Computer Monitor 1 Each @ 600
Staples \$600.00

Request Total: \$600.00

11. Complete the required **Purchase Details**, and then select **Save**.

After creating the purchase request, you can take additional actions, such as submitting, deleting, or adding an image to the request.

Not Submitted

PURCHASE REQUEST #125 Actions ▾ Delete Submit


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

PURCHASE DETAILS Edit

Policy: Purchase Request Policy
Employee: Never, William N.
Description: Printer
Comment:

REQUEST ITEMS

☐ Add Delete Edit ☐ Show Distributions

☐ **Printer** Quantity: 1 Each Unit Price: 3,000 Total: \$3,000.00 

Expense Type: Equipment Purchases
Office Depot (Unapproved)
100 108th Ave NE
Bellevue, WA 98004
[View Details](#)

Needed By: 10/03/2022

[Show Comments](#)

Ship To Address Change

Triton Warehouse North
1234 Fake St
Seattle, WA 98149 US

☐ Make this location my default

Bill To Address Change

Triton Warehouse North
1234 Fake St
Seattle, WA 98149 US

Total: \$3,000.00

Approving a Purchase Request

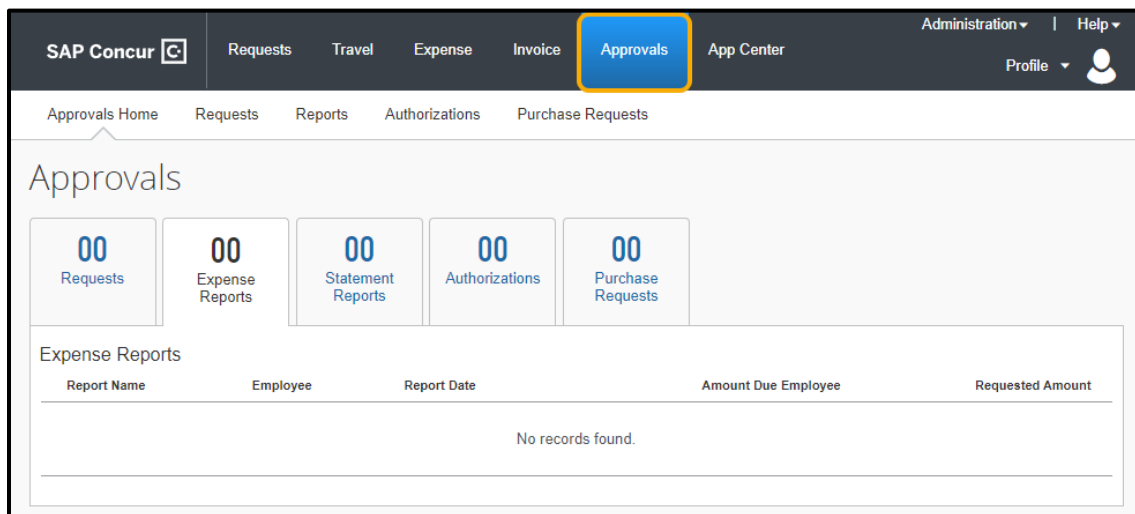
As a Request approver, you can review a purchase request sent to you for review and approval and then:

- Approve the request.
- Approve the request and forward it to another approver (if your company is configured to use this workflow feature).
- Send the request back to the user with a comment (to change and resubmit the request) or decline the request.

To approve a purchase request

1. On the **SAP Concur** home page, from the menu bar, select **Approvals**.

From the **Approvals** page, any items awaiting your approval are listed under the appropriate tab.



2. Select the **Purchase Requests** tab.
3. On the **Approvals** page, select the appropriate **Request No.** link, and then complete one of the following three steps:
 - Review the request and then select **Approve**.
 - Review the request and select **Approve & Forward**.
 - Review the request and then select **Send Back** to request a correction.

To attach additional documentation to a selected request, select **Actions**, and then select **Upload Image**.

If your company has multiple steps in the approval process, then select **Approve & Forward** to send it to the next approver in the workflow.

4. If you need to access requests that you previously approved, select the **Change View** dropdown arrow, and then select the appropriate option.



You will see the requests that you approved for the selected time frame.

Creating an Invoice from an Existing Vendor

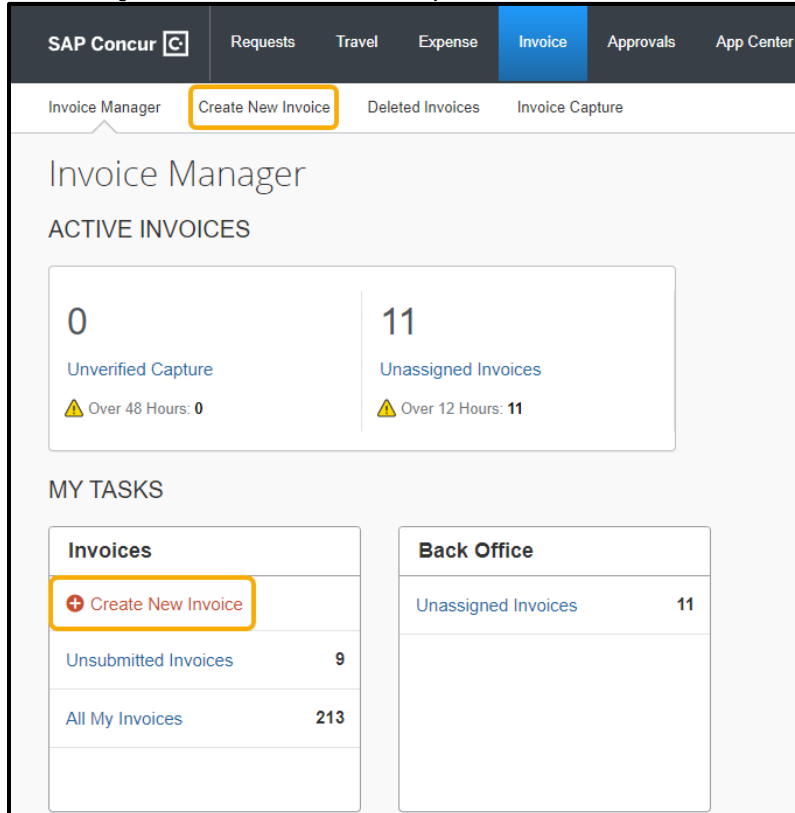
You can manually create an invoice using an approved vendor that was added by your company.


The basic steps in the invoice process are:

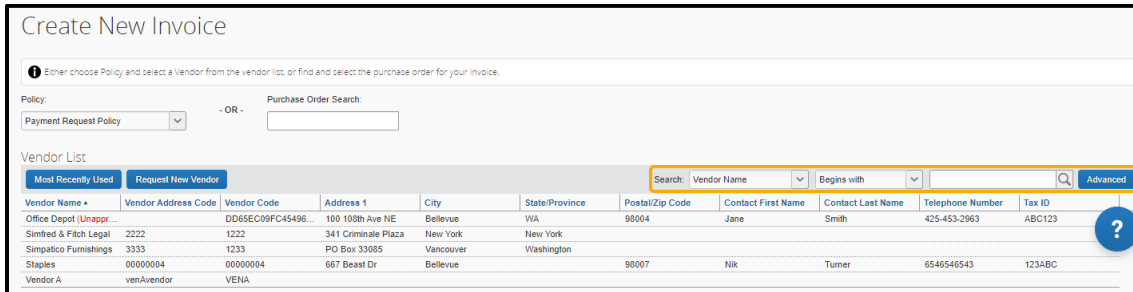
1. **Create** the invoice – Select or add a vendor, and then provide request-level information (such as the invoice name, invoice number and date, amounts, and comments).
2. **Itemize** the payment request – Select the expense type, such as "Computing Equipment."
3. **Distribute** or allocate the invoice across departments.
4. **Attach** an image of the invoice.
5. **Assign** the invoice – Review the information on the invoice, and then assign it to the appropriate employee.
6. **Unassign** the invoice (*optional*) to reassign it to the employee associated with the request.

To create an invoice

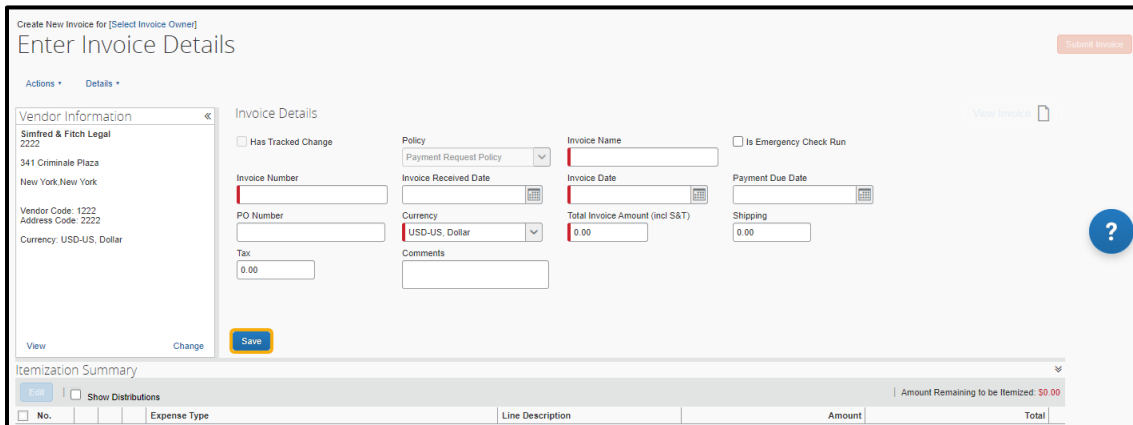
1. On the **SAP Concur** home page, from the menu bar, select **Invoice**.
2. On the **Invoice Manager** page, you can select **Create New Invoice** on the submenu or under **My Tasks** in the **Invoices** pane.



- On the **Create New Invoice** page, use the **Search** fields to find and select the appropriate vendor or select it from the entire **Vendor List** by selecting the **Search** icon .



- Select the appropriate vendor from the list.
- On the **Enter Invoice Details** page, complete the required fields (indicated with a red bar) and optional fields as directed by your company, and then select **Save**.



To Itemize an invoice

You must itemize all invoices to show the goods or services received.

- On the **Amount Remaining to be Itemized** page, select the appropriate expense type, such as **Furniture** and **Fixtures**.
- In the **Add Item** section, complete all required fields (indicated with a red asterisk) and optional fields as directed by your company, and then select **Add**.
- Continue adding items until all the items (expense types) are represented, and then select **Save**.

The **Amount Remaining** to be itemized balance will be \$0.00 when all the items are correctly added.

You can also view or upload images from this screen.

Amount Remaining to be Itemized: \$ 432.00

[New](#) [Delete](#) [View Image](#) [Upload Image](#)

<input type="checkbox"/> No. *	Expense Type	Line Description	Amount	Total
<input type="checkbox"/> 2	Equipment Purchases	2011	432.00	\$432.00

[Add Item](#) [Add](#) [Clear](#)

No.	* Expense Type	* Line Description	* Amount	Total
3		2100	\$0.00	\$0.00

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

- On the **Invoice** page, select **Submit Invoice**.

Invoice for (Select Invoice Owner)

Computer Monitor Replacement

Status: Not Submitted [Assign](#) [Submit Invoice](#)

[Actions](#) [Details](#)

Vendor Information

Simfred & Fitch Legal
2222
341 Criminal Plaza
New York, New York

Vendor Code: 1222
Address Code: 2222
Currency: USD-US, Dollar

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

Invoice Details

☐ Has Tracked Change

Policy: [Payment Request Policy](#)

Invoice Number: 1235
Invoice Received Date: 09/30/2022
PO Number:
Currency: USD-US, Dollar
Tax: 0.00
Comments:
[Save](#)

Invoice Name: Computer Monitor Replacement
Invoice Date: 09/30/2022
Payment Due Date: 10/30/2022
Total Invoice Amount (incl S&T): 300.00
Shipping: 0.00
☐ Is Emergency Check Run

[View Invoice](#)

[?](#)

Itemization Summary

[Add Item](#) [Delete Item](#) [Edit](#) [Distribute](#) ☐ Show Distributions

<input type="checkbox"/> No.	Expense Type	Line Description	Amount	Total
<input type="checkbox"/> 1	Legal Non-Claim	equipment	\$0.00	\$0.00

Amount Remaining to be Itemized: \$300.00

The invoice is submitted for approval and you are returned to the **My Invoices** page.

To distribute an invoice

After creating a new invoice, you can distribute the amount of the expense. Distributing allows you to allocate a portion of the transaction to different cost centers, departments, or locations based on accounting requirements.

- In the **Itemization Summary** area of the page, select the appropriate check boxes (on the left side of the page) for the items that you want to distribute.
- Select **Distribute**, and then select **Distribute Selected Items**.

You can also use the **Distributions** template to import your distributions. You use the template when you have recurring distributions.

- On the **Distribute Selected Items** page, select **Distribute By**, and then select **Percentage** or **Amount** as the distribution type.

4. Select **Add**.

Distribute Selected Items

Distributions | Distribution Summary

Total: \$449.95 | Distributed: \$449.95 (100%) | Remaining: \$0.00 (0%)

Distributions

Add | Delete | Favorites | Add to Favorites

Percentage	* Company	* Department	* Cost Center	Distribution Code
100			(3010) Large ...	--3010

Cancel Save

With each additional allocation, the system automatically distributes the percentage evenly between the departments. You can manually adjust the **Percentage** or **Amount** fields as needed.

To attach an image to an invoice

Your company might require that an image of the invoice is attached to the invoice prior to submission.

1. In the **Vendor Information** area of the page, select **View**.

Invoice

ACME, Inc (84395734)-786705

Status: Accounting Review

Send Back | Send to Approver | Approve

Actions | Details

Vendor Information

ACME, Inc
3764872346
3436 Fake St

Vendor Code: 84395734
Address Code: 3764872346
Currency: USD-US, Dollar

View

Invoice Details

☒ Has Tracked Change
☐ Is Emergency Check Run

Invoice Date: 02/10/2020
Currency: USD-US, Dollar

Policy: Payment Request Policy
Invoice Number: 786705
Payment Due Date: 03/10/2020
Total Invoice Amount (incl S&T):

Invoice Name: ACME, Inc (84395734)-786705
Invoice Received Date: 09/08/2015
PO Number:
Shipping:

View Invoice

Save

2. On the **Vendor Information** page, select the **Actions** dropdown menu, and then select **Upload Image**.

3. Select **Browse**, to navigate to the image file, and then select **Open**.

4. Select **Upload**, and then select **Close**.

The amount of time required to upload the images depends on the size of each file and the connection speed.

You can view the image later by opening the invoice and then selecting **View Invoice** on the right side of the page.

Invoice: ACME, Inc (84395734)-786705

Status: Accounting Review

Buttons: Send Back, Send to Approver, Approve

Actions: Details

Vendor Information: ACME, Inc, 3764872346, 3436 Fake St, Vendor Code: 84395734, Address Code: 3764872346, Currency: USD-US, Dollar

Invoice Details: Has Tracked Change, Is Emergency Check Run, Invoice Date: 02/10/2020, Currency, Policy: Payment Request Policy, Invoice Number: 786705, Payment Due Date: 03/10/2020, Total Invoice Amount (incl S&T), Invoice Name: ACME, Inc (84395734)-786705, Invoice Received Date: 09/08/2015, PO Number, Shipping

Itemization Summary: Edit, Show Distributions, Amount Remaining to be Itemized: \$0.00

No.	Expense Type	Line Description	Amount	Total
1	Temporary Services	I professional event for 40	\$389.50	\$389.50

Account Code	Distribution Code	Percentage	Net Amount	Gross Amount
1		100	\$389.50	\$425.33

To assign an invoice

If your company uses a centralized process, your Accounts Payable (AP) department might create invoices for employees before assigning them to the correct invoice owner. In this case, as the invoice owner, you can assign the invoice back to AP if changes are needed.

1. On the **Invoice** tab, select the invoice that you want to assign.
2. Select **Assign**.

Invoice: Printer Ink Cartridges

Status: Not Submitted

Buttons: Assign

Actions: Details

Vendor Information: Staples, 00000004, 667 Beast Dr, Bellevue, UNITED STATES 98007, Vendor Code: 00000004, Address Code: 00000004, Currency: USD-US, Dollar

Invoice Details: Has Tracked Change, Is Emergency Check Run, Invoice Date: 02/03/2020, Currency: US, Dollar, Policy: Payment Request Policy, Invoice Number: 4114, Payment Due Date: 03/04/2020, Total Invoice Amount (incl S&T): 245.00, Invoice Name: Printer Ink Cartridges, Invoice Received Date, PO Number, Shipping: 0.00

3. In the **Assign Invoices** window, enter the employee that you want to assign the invoice to, and then select **Assign**.

To unassign an invoice (optional)

If an invoice doesn't belong in your queue or is invalid, you can unassign it to allow your back-office staff to act on it, such as reassigning it to the appropriate invoice owner.

1. On the **Invoice** screen, select the **Actions** dropdown menu, and then select **Unassign**.

Invoice
Big Enterprises (000000001) - 536602

Status: Not Submitted [Assign](#)

Actions ▾ **Details** ▾

- Unassign**
- Upload Image
- Delete Image
- View Payment Image
- Review Required
- Remove From Review
- Delete Invoice
- Print
- Extend Due Date
- Void Invoice

Invoice Details

☐ Has Tracked Change

☐ Is Emergency Check Run

Invoice Date: 10/06/2017

Currency: US Dollar

Policy: Payment Request Policy

Invoice Number:

Payment Due Date: 01/01/2020

Total Invoice Amount (incl S&T): \$00.00

Shipping: \$00.00

Invoice Name: Big Enterprises (000000001) - 536602

Invoice Received Date:

PO Number:

[View Invoice](#)

2. In the **Unassign Invoice** window, in the **Comment** field, explain why you are unassigning the invoice, and then select **OK**.

Unassign Invoice

Invoices should be unassigned when they don't belong in your queue. They may belong to another employee or be invalid. Unassigning removes the invoice from your queue and allows the backoffice to act on it. Please add a comment to explain why you are unassigning.

Comment:

This invoice does not belong in my queue.

Comment History

Date ▾	Entered By	Comment Text
No comments.		

[OK](#) [Cancel](#)

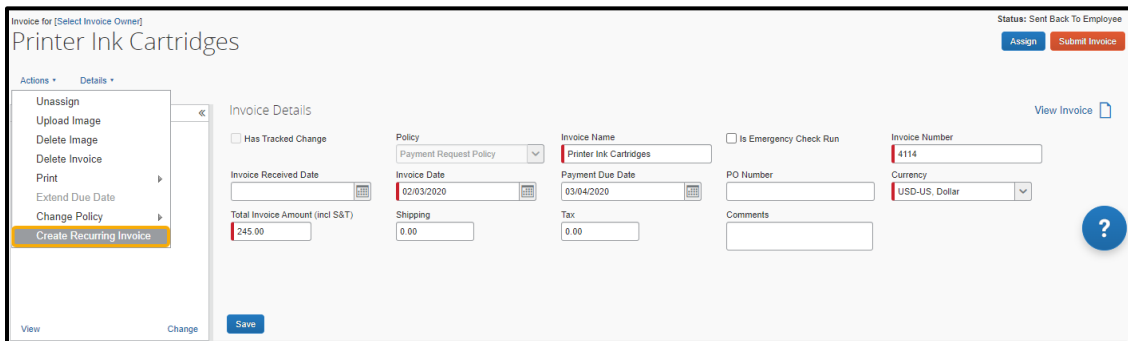
Creating a Recurring Invoice

You can convert any invoice (submitted or unsubmitted) into a recurring invoice. You can use this feature for any type of recurring goods or services that you receive, such as a monthly phone bill, rent, or Internet service.

To create a recurring invoice

1. From the **SAP Concur** home page, from the menu bar, select **Invoice**.
2. From the **Invoice Manager** submenu, select the **Name** of the invoice that you want to convert to a recurring invoice.
3. Select the **Actions** dropdown menu, and then select **Create Recurring Invoice**.

After you create a recurring invoice, you can modify the payment schedule by selecting **Edit Recurring Invoice**.



The screenshot shows the SAP Concur interface for an invoice titled "Printer Ink Cartridges". The "Actions" dropdown menu is open, and the "Create Recurring Invoice" option is highlighted. The "Invoice Details" section includes the following fields:

- Policy:** Payment Request Policy
- Invoice Name:** Printer Ink Cartridges
- Invoice Date:** 02/03/2020
- Payment Due Date:** 03/04/2020
- PO Number:**
- Currency:** USD-US, Dollar
- Total Invoice Amount (incl S&T):** 245.00
- Shipping:** 0.00
- Tax:** 0.00
- Comments:**

The "Create Recurring Invoice" button is located at the bottom of the "Invoice Details" section. The status bar at the top right indicates "Status: Sent Back To Employee" with "Assign" and "Submit Invoice" buttons.

4. In the **Recurring Invoice Details** window, select the frequency for the recurring invoice from the dropdown list.
5. Select when you want the recurring invoice to be due from the **What day(s) of the month is the payment for the recurring invoice due** from the dropdown list.
6. Select the appropriate option for how to manage the invoice number.

7. Select the **Start** and **End** dates for when this recurring request will be effective, and then select **Save**.

Recurring Invoice Details

What is the frequency of this recurring invoice?

Quarterly

What day(s) of the month is the payment for this recurring invoice due?

15

How should the Invoice Number be managed?

☒ Copy Invoice Number from current invoice

☐ Copy Invoice Number from current invoice, but add auto-incrementing value as a suffix(ex. 1234 becomes 1234-001, 1234-002, etc)

☐ Blank out Invoice Number

When is this recurring invoice effective?

Start:

09/30/2022

End:

09/30/2023

Note: The recurring invoices will be created 14 days prior to their scheduled payment due date

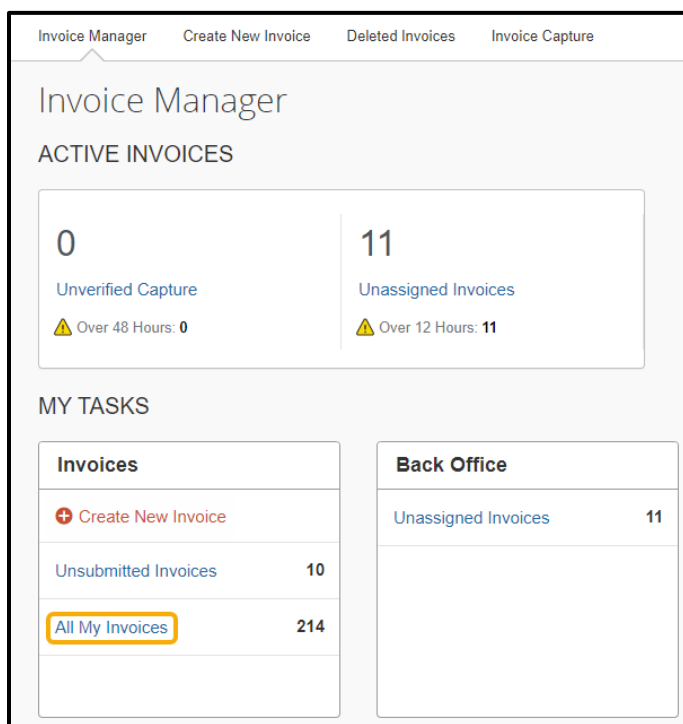
Save

Cancel

The system duplicates the recurring invoice, which appears on the **Recurring Invoice** page.

8. To view the invoice, select the **Invoice Manager** submenu.

9. In the **My Tasks** section, select **All My Invoices**.



10. On the **My Invoices** page, select the **View** dropdown menu, and then select **Recurring Invoices**.

You will see the new recurring invoice in the list. This duplication occurs on a regular basis specified by the offset value (the default is 14 days prior to the payment date).

Approving an Invoice

As an Invoice approver, you can review an invoice sent to you, and then:

- Approve the invoice.
- Attach additional receipt images or documentation to the invoice.
- Send an invoice back to the employee to modify, and then resubmit the invoice.

To approve an invoice

1. On the **SAP Concur** home page, in the **My Tasks** section, under the **Required Approvals** heading, select **Invoices**.

You can also select the **Approvals** tab at the top of the home page and then select **Invoices**.

2. On the **Approvals** page, complete one of the following three steps:
 - To approve an invoice as is (without opening it and reviewing the details), select the appropriate invoice, and then select **Approve**.
 - To review the details of the invoice, double-click the appropriate invoice, review it for accuracy, and then select **Approve** or **Approve & Forward**.
 - To send back an invoice for correction, double-click the appropriate invoice, and then select **Send Back**.

The screenshot shows the SAP Concur interface for approving an invoice. The top navigation bar includes 'Requests', 'Travel', 'Expense', 'Invoice', 'Approvals' (selected), 'Reporting', 'App Center', 'Administration', and 'Help'. The 'Approvals' section is active, showing a list of invoices. The selected invoice is 'Mobilier de bureau' with a status of 'Pending Approval - Smith, John C.'. The invoice details are displayed below, including Vendor Information (ABC, LLC), Invoice Details (Invoice Number 54321, Invoice Date 08/14/2015), and Itemization Summary. The 'Approve' button is highlighted in red.

Invoice Details:

- Vendor Information: ABC, LLC, 8798798799, 821 Elm St, Vendor Code: 98327934, Address Code: 8798798799, Currency: USD-US, Dollar.
- Invoice Details: Has Tracked Change, Is Emergency Check Run, Invoice Date: 08/14/2015, Currency, Invoice Number: 54321, Payment Due Date: 12/10/2015, Total Invoice Amount (incl S&T), Invoice Name: Mobilier de bureau, Invoice Received Date, PO Number, Shipping.

Itemization Summary:

No.	Expense Type	Line Description	Amount	Total
1	Furniture and Fixtures	Remplacement de chaises	€495.50	€ 495.50
			Net Amount	Gross Amount
1	Account Code	Distribution Code	Percentage	
1			50	€ 247.75
1			50	€ 247.75

Requesting a New Vendor

If the vendor for your payment request is not located within the system, you can submit a new vendor request.

To request a new vendor

1. On the **Invoice** tab, select **Create New Request**.
2. On the **Create New Payment Request** screen, select **Request New Vendor**.
3. Under **General Vendor Information**, complete the required fields (indicated with a red bar), and then complete one of the following options:
 - Select **OK** to submit it without further action for the new vendor request.
 - To attach documentation before submitting the new vendor request, select **Apply**, and then select **Upload Images** in the **Actions** menu.

After selecting **Apply**, the **Actions** menu is activated, and you can then attach documentation to the new vendor request.

SAP Concur | Requests | Travel | Expense | **Invoice** | Approvals | Reporting | Administration | Help | Profile

Manage Requests | Create New Request | Processor | Payment Manager

Create New Payment Request

Either choose Payment Request Type and select a Vendor from the vendor list, or find and select the purchase order for your payment request.

Payment Request Type: - OR - Purchase Order Number:

Payment Request Policy:

Vendor List

Most Recently Used | **Request New Vendor** | Search: Vendor Name | Begins with: |

Vendor Name	Vendor Add...	Vendor Code	Address 1	City	State/Province	Postal/Zip C...	Contact Fir...	Contact Las...	Telephone ...	Tax ID
Office Depot ...	C90B32F84...	100 108th Av...	Bellevue	WA	98004	Jane	Smith	425-453-2956	ABC123	

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

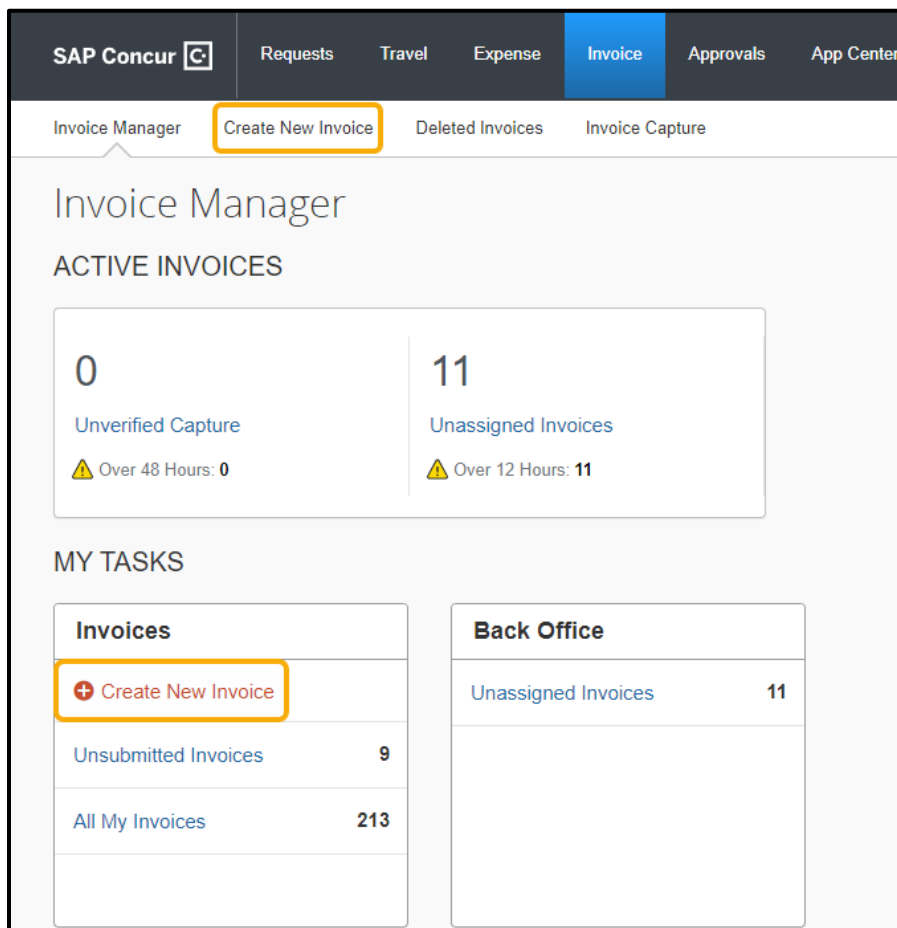
Assigning a Purchase Order to an Invoice

You can add an invoice by Invoice Capture or by the client. The invoice is already associated to a purchase order (PO) if it was scanned through Invoice Capture and has a PO number that is available in the SAP Concur system.

If an invoice is associated with a PO number, but not yet been scanned through Invoice Capture, you must create a new invoice, and then match the invoice to the PO.

To assign a purchase order to an invoice

1. From the SAP Concur home page, from the menu bar, select **Invoice**.
If the invoice is assigned an invoice owner, you can open it in **Active Invoices** in the **Unsubmitted Invoices** section. If it has not yet been assigned, then you will need to open the invoice in the **Unassigned Invoices** area, and then select an Invoice Owner.
2. Select the **Create New Invoice** tab.



In this example, you will see how to use the Purchase Order number to search for a PO instead of searching for a vendor as you would with non-PO invoices.

- Enter the **Purchase Order Number** that you want to assign, and then select the appropriate purchase order.

Create New Invoice

Enter choose Policy and select a Vendor from the vendor list, or find and select the purchase order for your invoice.

Policy: - OR -

Vendor List

Vendor Name	Vendor Address Code	Vendor Code	Purchase Order Number	Vendor Name	Purchase Order Amount
Office Depot (Unapp...	2222	00000002	12	Home Depot	449.95
Simplot & Fitch Legal	3333	1233	14	Big G Enterprises	18,750.00
Staples	00000004	00000004	15	Jurassic Landscape	9,000.00
Vendor A	ven-Avondor	VENA	16	Jurassic Landscape	

Search:

State/Province	Postal/Zip Code	Contact First Name	Contact Last Name	Telephone Number	Tax ID
WA	98004	Jane	Smith	425-453-2963	ABC123
New York					
Washington	98007	Nik	Turner	6546546543	123ABC

- After you select the purchase order, you can enter invoice details on the **Invoice** tab.
- Select the **Purchase Order** tab.
- Review the details for the selected purchase order.

Notice that all of the fields are read-only unless you are assigned the Purchase Order Processor role.

- To enter the invoice details, select the **Invoice** tab.

Create New Invoice for Neveer, William

Enter Invoice Details

Actions • Details •

Invoice Purchase Order Matching Summary

Vendor Information

Home Depot
00000002
4321 Fake St
Seattle, UNITED STATES
98144
Vendor Code: 00000002
Address Code: 00000002
Currency: USD-US, Dollar

View Change Save

Invoice Details

☐ Has Tracked Change

Policy:

Invoice Number:

PO Number:

Tax:

Invoice Received Date:

Invoice Date:

Currency:

Comments:

Invoice Name:

☐ Is Emergency Check Run

Payment Due Date:

Total Invoice Amount (incl S&T):

Shipping:

Itemization Summary

☒ Show Distributions

Amount Remaining to be Itemized: \$0.00

No.	Expense Type	Line Description	Amount	Total
No items found.				

Notice that several of the invoice fields are prepopulated.

8. Complete the required and optional fields as directed by your company, and then select **Save**.

Enter Invoice Details

Vendor Information: Home Depot, 00000002, 4321 Fake St, Seattle, UNITED STATES, 98144. Vendor Code: 00000002, Address Code: 00000002, Currency: USD-US, Dollar.

Invoice Details: Invoice Number 12345, PO Number 12, Currency USD-US, Dollar, Tax 0.00. Invoice Name: Printer Ink Cartridges, Invoice Date 09/30/2022, Total Invoice Amount (incl S&T) 325.00, Shipping 0.00. Payment Due Date 10/30/2022.

Itemization Summary: Amount Remaining to be Itemized: \$0.00. No items found.

9. On the **Amount Remaining to be Itemized** screen, you can select the **Expense Type** for the itemization, enter the **Line Description**, and **Amount** for each line item. In the following example, you will see how to create line items on the **Matching Summary** tab.
10. On the **Amount Remaining to be itemized** screen, select **Cancel**.
11. Select the **Matching Summary** tab.
You can quickly create line items by copying them from the PO.
12. Select **Copy Items from PO**.
13. In the **Copy Items from PO** window, select the check box for the appropriate purchase order line items that you want to assign to the invoice, and then select **Copy**.

Copy Items from PO

PO Number: 12 Go to line: Line Number

PO #	Line Item	Description	Quantity	Unit Price	Subtotal
12	1	Office Chairs	5	\$89.99	\$449.95

Cancel Copy

Notice that the line item is now listed in the **Invoice** section.

14. To submit the invoice, select the **Invoice** tab.

15. Select **Submit Invoice**.

Invoice for [Select Invoice Owner]
Computer Monitor Replacement

Status: Not Submitted [Assign](#) [Submit Invoice](#)

Actions ▾ Details ▾

Vendor Information
Semfred & Fitch Legal
2222
341 Criminals Plaza
New York, New York
Vendor Code: 1222
Address Code: 2222
Currency: USD-US, Dollar

Invoice Details

☐ Has Tracked Change

Policy
Payment Request Policy ▾

Invoice Name
Computer Monitor Replacement

☐ Is Emergency Check Run

Invoice Number
1235

Invoice Received Date
09/30/2022

Invoice Date
09/30/2022

Payment Due Date
10/30/2022

PO Number

Currency
USD-US, Dollar

Total Invoice Amount (incl S&T)
300.00

Shipping
0.00

Tax
0.00

Comments

[View Invoice](#)

Itemization Summary

[Add Item](#) [Delete Item](#) [Edit](#) [Distribute ▾](#) ☐ Show Distributions | Amount Remaining to be Itemized: \$300.00

No.	Expense Type	Line Description	Amount	Total
1	Legal Non-Claim	equipment	\$0.00	\$0.00

The Invoice is now submitted with the assigned purchase order.