

Procure to Pay

Quick Reference Guide How to Add Card Charges to an Expense Report Concur Travel and Non-Travel

HOW TO ADD CARD CHARGES TO AN EXPENSE REPORT

This guide demonstrates how to add credit card transactions from your U.S. Bank card to a Concur Expense Report.

Your card transactions are accessible via two locations within Concur:

 On the Concur home page, on the left side below the heading Available Expenses and/or in the "Available Expenses" section along the top menu, as shown below:

Concur Home Y					() () ()
© Cruste ~		Authorization Requests	available Expenses	20 Expense Reports	0
BOSTON UNIVERSITY Available Expenses (20)	See All	Expense Reports	+ Request	s (1) +	
Government Services (Not Elsewh January 29, 2025	\$862.93		TEST March 28, 2 Request 3C	\$300.00 025 XM	
Automated Referral Service (For January 23, 2025	\$445.84				

(2) On the Expense page (accessible by clicking the Home dropdown menu and selecting "Expense")

Home Home Requests Expense App Center	ADMINISTRATION Company Company Admin Web Services Report Admin Authentication Admin Travel Admin	Concur Expense Manage Expenses Manage Expenses					Ø
		Report Library Ver Active Report	ts v	No F	Reports		(O Create New Report
		Available Expenses view All All Accept Payment Type [1 Tex CRCP Tex CRCP	Expenses v Expense Source Corporate Card Corporate Card	Expense Type11 Undefined Undefined	Vender Details.[] Government Services (Not Elsewh Automated Referral Service (For	View Edit Delete Co Date JF 01/28/2025 01/28/2025	Move ∨ Amount↓↑ \$882.93 \$445.84

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IF YOU NEED TO MOVE THE TRANSACTIONS INTO AN EXPENSE REPORT, COMPLETE THE FOLLOWING STEPS.

- Select the box next to the appropriate transaction(s). To select all available transactions, click the box to the left of the word "Receipt." Note: You can view more information regarding the transaction simply by clicking on the Expense within the Available Expenses list.
- Once the desired transactions are highlighted, click on the blue "Move" button and select "New Report." If you want to add the transaction(s) to a report you already have in progress, select the name of that report.

1	Ava	ilable	Expenses View: All Expense	es 🗸			View Edit Delete Combin	Expenses	Move 🗸	
Ľ		Receipt	Payment Type↓↑	Expense Source	Expense Type↓↑	Vendor Details↓†	Date↓≓	Amount	New Report	
			Test CBCP	Corporate Card	Undefined	Government Services (Not Elsewh	01/29/2025	\$862.93	•••	
			Test CBCP	Corporate Card	Undefined	Automated Referral Service (For	01/23/2025	\$445.84		
			Test CBCP	Corporate Card	Undefined	Automated Referral Service (For	01/23/2025	\$-445.84		
			Test CBCP	Corporate Card	Undefined	Disinfecting Services	01/16/2025	\$750.74		
			Test CBCP	Corporate Card	Undefined	Ambulance Services	01/15/2025	\$304.19		

IF YOU HAVE ALREADY CREATED YOUR EXPENSE REPORT AND NEED TO ADD YOUR TRANSACTIONS TO THE REPORT, COMPLETE THE STEPS BELOW:

1. Click on the desired report from your Report Library

SAP Concur C Expense Manage Expenses Card Transaction	-	Ø
Home / Expense / Manage Expenses	5	
Report Library	-	Create New Report
		⊘ View: Active Reports ➤
ProLeadership San Diego 0 02/16/2024 \$0.00 Not Submitted	2024 Feb Mar Expenses 02/15/2024 \$40.62 Not Submitted	

- 3. Click "Add Expense" and select the Available Expense(s) you would like to add to the report.
- 4. Select "Add to Report"

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Report Details 🗸	-	2	+					View Available Rec
Add Expense	Availab	le Expenses	Create New I	Expense				
		Payme ↓↑	Expens↓Î	Expens↓Î	Vendor↓↑	Date↓₹	Amount↓↑	
		US Bank CBCP	Corporate Card	Airfare (513500, 513700)	JETBLUE 2798096267 059	12/15/2023	\$377.80	
		US Bank CBCP	Corporate Card	Conference Registrations (513900)	UNM MARKETPLA CE	12/15/2023	\$725.00	

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The selected charges will now appear in the report you are working on. You can then edit and fill in **all required fields** highlighted in red as needed.

	Expense / Ma	anage Expense	es / ProLeadership San I	Diego 030324			
😢 Al	erts: 4						~
Pro	Lead	lershi	p San Die	go 030324 \$1,102.	.80	Delete Report	Submit Report
Vot Suk	omitted F	Report Numb	er: PDVVZT			<u> </u>	
Report	t Details 🗸	Print/Share 1	 Manage Receipts ' 	✓ Travel Allowance ✓		View Ava	ilable Receipts 🗒
Add E	Expense	Edit Delet	e Copy Allocate	Combine Expenses Move to V			
	Alerts↓↑	Receipt↓↑	Payment Type↓↑	Expense Type↓↑	Vendor Details↓↑	Date↓₹	Requested↓↑
			LIS Park OPOD	Conference Registrations (512000)			
	0		US Dank CDCP	Conference Registrations (313500)	UNW MARKETPLACE	12/15/2023	\$725.00
	0		US Bank CBCP	Airfare (513500, 513700)	JETBLUE 2798096267059	12/15/2023	\$725.00 \$377.80