

Adding Expenses to a Report

1.) Click into the expense report that you want to add expense to.

The screenshot shows the SAP Concur 'Manage Expenses' interface. At the top, there is a navigation bar with 'Expense' selected. Below it, a 'REPORT LIBRARY' section shows three reports, each with a red 'RETURNED' banner and a date:

- Sales Tax Accounts**: RETURNED 04/02/2019, Amount: \$232.15
- Copy of test**: RETURNED 10/13/2021, Amount: \$238.00
- test**: RETURNED 04/23/2020, Amount: \$247.93

Each report card also indicates it was 'Sent Back to Employee' by KYLE METCALF. A 'Create New Report' button is visible on the left.

2.) Next, click Add Expense and choose create new expense.

The screenshot shows the details of the 'test \$0.00' report. A red arrow points to the 'Add Expense' button in the 'Report Details' section. The report status is 'Returned' with a comment from KYLE METCALF. Below the buttons, it states 'No Expenses' and 'Add expenses to this report to submit for reimbursement.'

The 'Add Expense' modal window is open, showing a list of expenses. A red arrow points to the '+ Create New Expense' button. The list contains two items:

<input type="checkbox"/>	Payment Type	Expense Type	Vendor Details	Date	Amount
<input type="checkbox"/>	Travel Card Agency Liability	Parking	THE PARKING SPOT 239 Humble, Texas	06/05/2022	\$47.65
<input type="checkbox"/>	Out of Pocket	Meals	Orlando World Center Marriott Orlando, Florida	03/17/2022	\$32.67

At the bottom, it says 'Displayed expenses: 2, Total: 2' and includes 'Close' and 'Add To Report' buttons.

3.) Choose an expense type from the list provided.

Add Expense



2
Available Expenses

+
Create New Expense

Search for an expense type

- ^ Recently Used
 - Internet
 - Dues
 - Car Rental
 - Hotel
 - Meals
- ^ Communications
 - Phone

4.) Fill out any fields that have a red asterisk and then click save expense.

The screenshot shows the 'New Expense' form with the following fields and values:

- Expense Type ***: Internet
- Transaction Date ***: MM/DD/YYYY
- Business Purpose**: (empty)
- Vendor Name**: (empty)
- City**: (empty)
- Payment Type ***: Out of Pocket
- Amount ***: 20.00
- Currency ***: US, Dollar
- Unallowable Charge**:
- Clearing Account**: (empty)
- FAMIS REF-A**: (empty)
- FAMIS REF-B**: (empty)
- Travel Classification**: Employee-Out of State
- Citi Corp Id**: (empty)
- Comment ***: to work on business e-mails

At the bottom, there are three buttons: 'Save Expense', 'Save and Add Another', and 'Cancel'. A red arrow points to the 'Save Expense' button.

5.) If you have Available expenses (travel card transactions) that need to be moved to the report, click Add Expense

The screenshot shows the expense report interface with the following elements:

- test \$0.00** with a trash icon.
- Submit Report** button.
- Returned** status with a red exclamation mark icon and a comment: 'COMMENT - KYLE METCALF: DO NOT DELETE-Please hold in your available reports. View Report Timeline'.
- Report Details** dropdown menu with options: Print/Share, Manage Receipts, Travel Allowance.
- Add Expense** button (highlighted with a red arrow).
- Edit**, **Delete**, **Copy**, **Allocate**, **Combine Expenses**, and **Move to** buttons.
- No Expenses** message: 'Add expenses to this report to submit for reimbursement.'

6.) Select the expenses you would like to add to the report by marking a check mark beside the expense and clicking add to report.

Add Expense



2
Available Expenses

+
Create New Expense

<input type="checkbox"/>	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ≡	Amount ↑↓
<input type="checkbox"/>	Travel Card Agency Liability	Parking	THE PARKING SPOT 239 Humble, Texas	06/05/2022	\$47.65
<input type="checkbox"/>	Out of Pocket	Meals	Orlando World Center Marriott Orlando, Florida	03/17/2022	\$32.67

Displayed expenses: 2, Total: 2

Close [Add To Report](#)

