



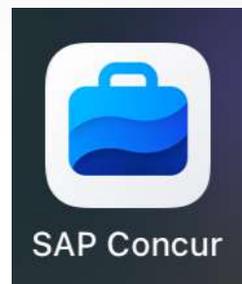
SAP Concur

App Reimbursement Guide

Concur Accounts



If you have already been set up with a Concur account, you will download the app and log in.



If you have not yet been set up with a Concur account, please contact: Danielle Gregoire at dgregoire@pef.org

Logging In



Your username will be provided to you in an email.

You will be provided a temporary password when your account is initially created

Once you log in you can change your password by choosing forgot password. Follow the instructions in the email to reset your password.

Once you log back in you will be prompted to do a 2-factor authentication. See slide 6 for details.

Logging In



Fill in your username and click **Next**

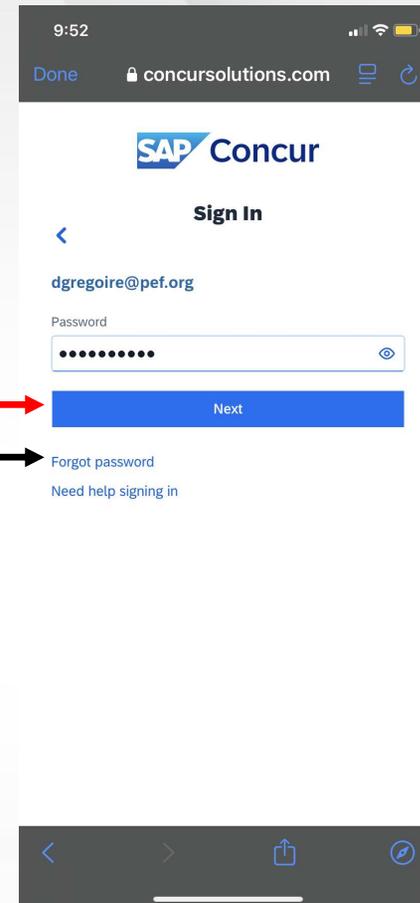
A screenshot of a mobile application interface for SAP Concur. The screen displays the 'Sign In' page. At the top, the status bar shows the time 9:52, signal strength, Wi-Fi, and battery icons. Below the status bar, there is a navigation bar with 'Done', a lock icon, the URL 'concursolutions.com', and refresh and search icons. The main content area features the 'SAP Concur Sign In' header. Below the header, there is a text input field labeled 'Username, verified email address, or SSO code' containing the email address 'dgregoire@pef.org'. A blue 'Next' button is positioned below the input field. At the bottom of the form, there is a 'Remember me' toggle switch (which is currently off), and two links: 'Forgot username' and 'Need help signing in'. The bottom of the screen shows a dark navigation bar with back, forward, share, and search icons.

Logging In



Fill in your password and click **Next**

If you do not know or want to change your password click on forgot password and follow the instructions in the email to reset it.





Two-factor Authentication

If you have previously set up the two-factor authentication go to the authentication app (microsoft – blue person in a blue lock icon) and enter the 6-digit code here.

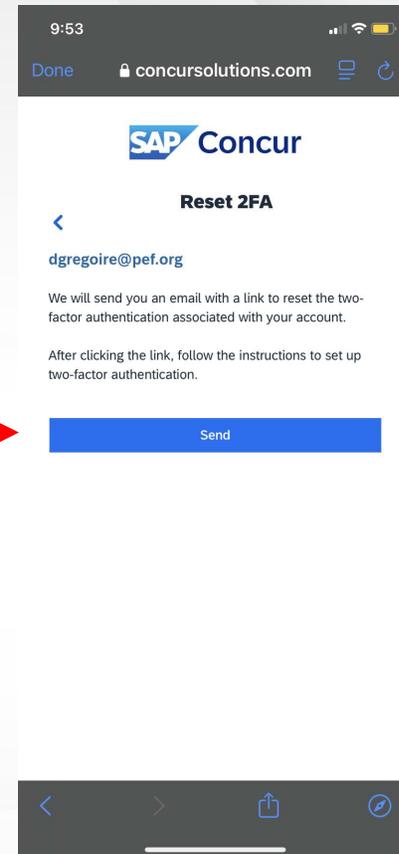
If you have **not** set it up yet, please click unable to enter authentication code.

A screenshot of a mobile browser displaying the SAP Concur Sign In page. The page title is 'Sign In' and the user email is 'dgregoire@pef.org'. Under the heading 'Two-factor Authentication', there is a text prompt: 'Enter the authentication code generated by the authenticator app on your mobile device or browser.' Below this is a text input field labeled '6-Digit Authentication Code' and a blue 'Sign In' button. At the bottom of the form area, there are two links: 'Unable to enter authentication code' and 'Need help signing in'. A black arrow points from the text 'enter the 6-digit code here' to the input field, and a red arrow points from the text 'click unable to enter authentication code' to the corresponding link.



Two-factor Authentication

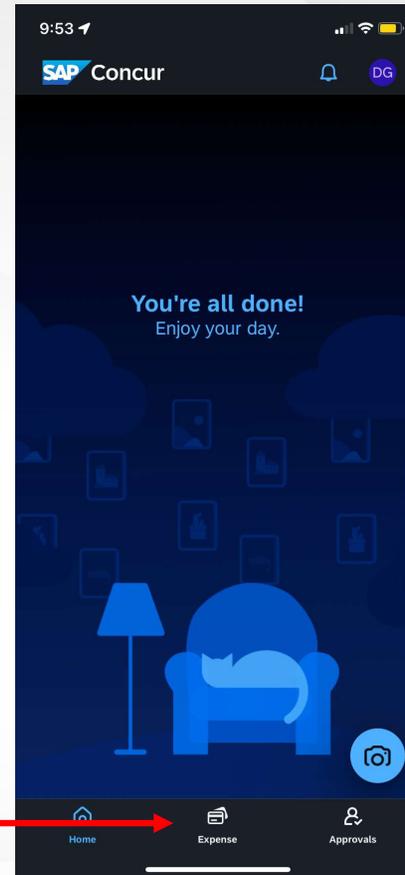
To reset the two-factor authentication please hit send. It will send you an email. Follow the instructions in the email.





Starting a report

When you successfully signed in your screen should look like this.



To start a new report click on Expense at the bottom

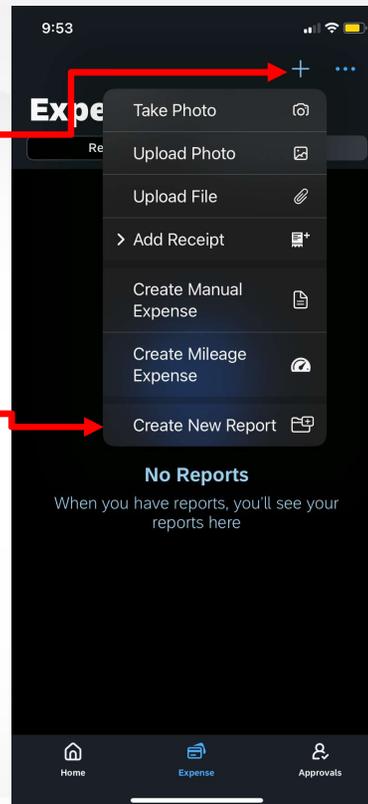


Starting a New Report



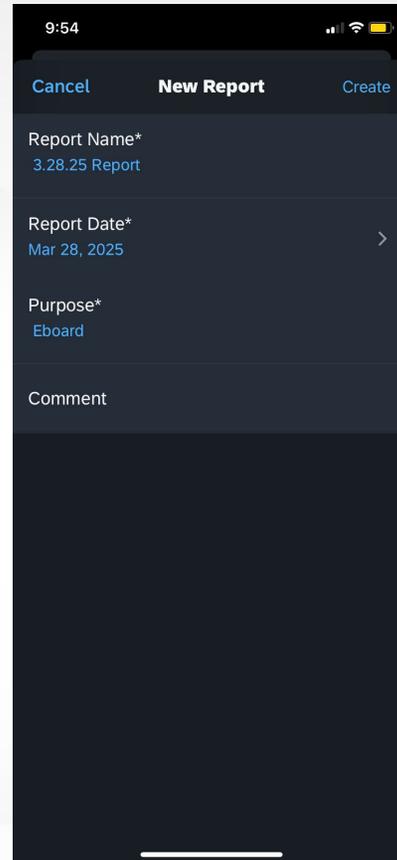
Press the + in the top right corner.

Then choose Create New Report



Creating the Report

- **Fill in the boxes marked with the asterix**
- Choose a report name that makes sense to you
- Report date can be the day you are entering the report
- Purpose is the reason you were traveling



9:54

Cancel **New Report** Create

Report Name*
3.28.25 Report

Report Date*
Mar 28, 2025

Purpose*
Eboard

Comment

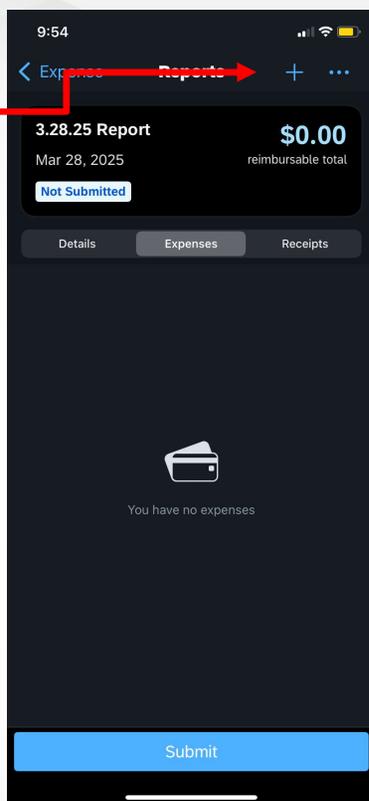
Click on create report when done



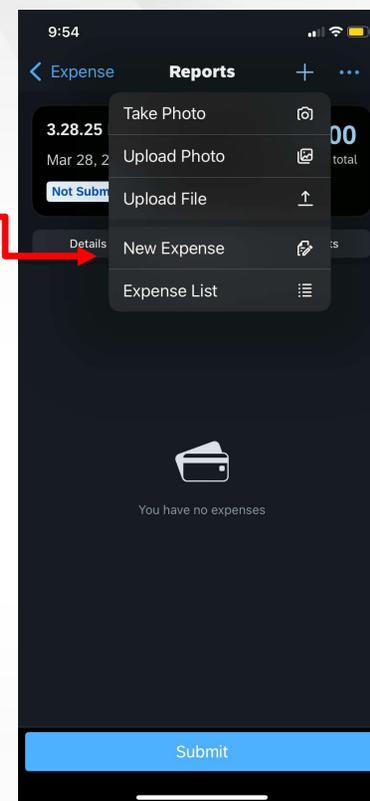
Adding the Expense



Click on the + sign



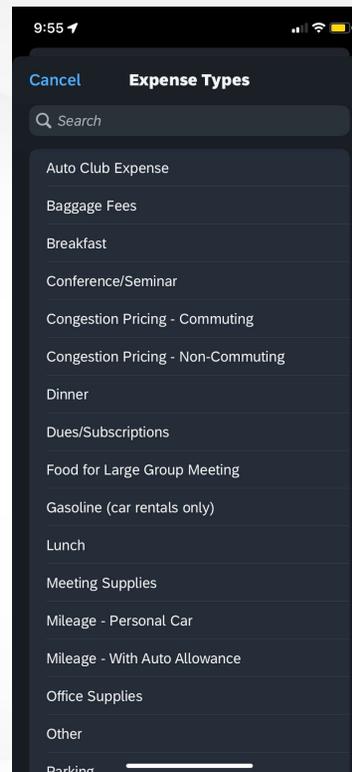
Click on new expense



Entering Expenses



Choose the expense type



Expense Type: Meals



Meal rates are based on the region that the meal was purchased in. Example: if purchased in Region 7, choose Regions 1-9; if purchased in Region 11, choose Regions 10-12)

Meal	Regions 1-9	Regions 10-12
Breakfast	\$12.00 * \$15.00 4/1/25	\$15.00 * \$20.00 4/1/25
Lunch	\$20.00 * \$23.00 4/1/25	\$23.00 * \$28.00 4/1/25
Dinner	\$45.00 * \$50.00 4/1/25	\$50.00 * \$60.00 4/1/25

Mileage vs. Gasoline



- Use the Mileage – Personal Car expense type when you drove your personal car to the meeting

- Use the Gasoline expense type when you drove a rental car to the meeting

Entering Meal Expenses



1. Click on **Add Receipt**
2. Take a picture of the receipt
3. Make sure all of required fields are filled in.

Be sure to always select the appropriate Department/Committee that you were traveling for

A screenshot of a mobile application interface for entering a new expense. The screen is titled 'New Expense' and has a blue header with a white plus sign and the text 'Add Receipt'. Below the header, there are several input fields: 'Amount' with a placeholder '___ USD', 'Expense Type*' with a dropdown menu showing 'Dinner', 'Date*' with a red asterisk and 'Required Field' below it, 'Description', 'Vendor', 'City', and 'Currency*' with a dropdown menu showing 'US, Dollar'.A screenshot of the mobile application interface showing the 'New Expense' form. The form is titled 'New Expense' and has a dark background. It contains several input fields: 'Description', 'Vendor', 'City', 'Currency*' with a dropdown menu showing 'US, Dollar', 'Payment Type*' with a dropdown menu showing 'Cash', 'Amount*' with a red asterisk and 'Required Field' below it, 'Personal*' with a toggle switch that is currently turned off, 'Comment' with a placeholder '0 >', 'Department/Committee*' with a red asterisk and 'Required Field' below it, and 'Meal Expense Location*' with a red asterisk and 'Required Field' below it.

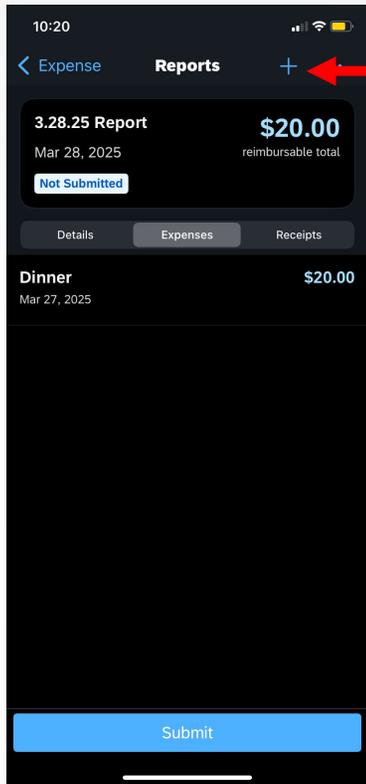
Never select the Personal box, as you will not receive reimbursement if you select that box

Entering Expenses

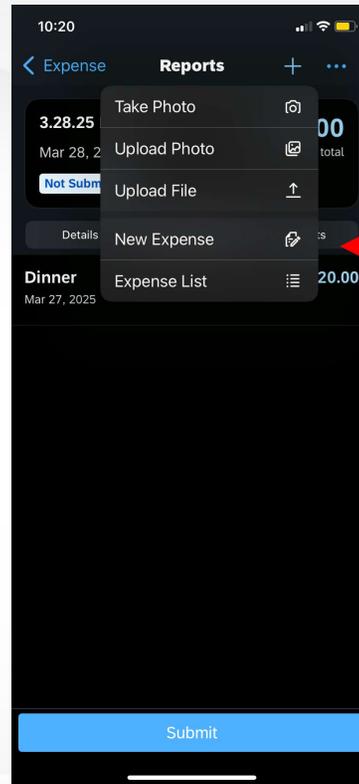
A screenshot of a mobile application's 'New Expense' screen. The screen has a dark background with a blue header bar containing 'Close', 'New Expense', and 'Save'. Below the header is a blue button with a receipt icon and the text 'Add Receipt'. The main form area contains several fields: 'Amount' with the value '\$20.00 USD', 'Expense Type*' with 'Dinner', 'Date*' with 'Mar 27, 2025', 'Description', 'Vendor', 'City', and 'Currency*' with 'US, Dollar'. Each field has a right-pointing chevron icon.A screenshot of the same mobile application's 'New Expense' screen, but with more fields filled out. The 'Save' button in the header is now highlighted in blue. The form fields include: 'Description', 'Vendor', 'City', 'Currency*' with 'US, Dollar', 'Payment Type*' with 'Cash', 'Amount*' with '20.00', 'Personal*' with a toggle switch turned off, 'Comment' with '0', 'Department/Committee*' with 'Executive Board', and 'Meal Expense Location*' with 'Regions 1 thru 9'. Each field has a right-pointing chevron icon.

Once you have filled everything in click on **save**

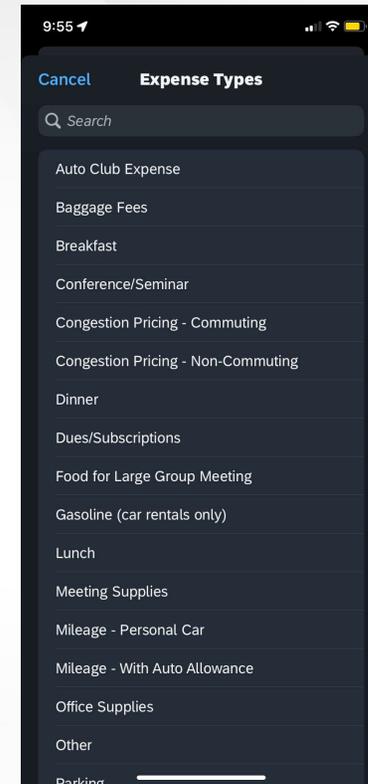
Entering another expense on the same report



To add another expense to your report you will click the + sign in the top right hand corner



Next choose **New Expense**



Finally choose the type of expense

Expense Type: Mileage



Click on **Add Route**

A screenshot of a mobile application interface for entering a new expense. The screen is titled 'New Expense' and has a blue header with 'Add Route' and a plus icon. Below the header, there are several input fields: 'Amount' with a value of '\$0.00 USD', 'Distance*' with a value of '0', 'Expense Type*' with a dropdown menu showing 'Mileage - Personal Car', 'Date*' with a value of 'Mar 27, 2025', 'Description*' with a red asterisk and 'Required Field' text, 'From Location*' with a red asterisk and 'Required Field' text, and 'To Location*' with a red asterisk. The bottom of the screen shows a white home indicator bar.

Type in your start location and your end location

A screenshot of a mobile application interface for a distance calculator. The screen is titled 'Distance Calculator' and has a dark background. It shows two input fields for start and end locations: '1168 Troy-Schenectady Rd, Latham, N...' and '660 Albany Shaker Rd, Albany, NY 12...'. Below the input fields is a map showing a route between the two locations. At the bottom of the screen, there is a blue button labeled 'Use Route' and a text box showing '3.8 miles'. The bottom of the screen shows a white home indicator bar.

Select **use route** at bottom.



Expense Type: Mileage

After you click on use route it will populate the expense form for you.

Make sure that all required fields are filled in.

A screenshot of a mobile application interface at 9:58. The screen is titled 'Expense' and shows a map with a blue route between two red location pins. Below the map, the 'Amount' is \$2.80 USD. The 'Distance' is 4. The 'Expense Type' is 'Mileage - Personal Car'. The 'Date' is 'Mar 27, 2025'. The 'Description' is 'Executive Board'. The 'From Location' is partially visible at the bottom.A screenshot of a mobile application interface at 10:27, titled 'New Expense'. It shows a form with the following fields: 'Description*' (Executive Board), 'From Location*' (1168 Troy-Schenectady Rd, Latham, NY 12110, USA), 'To Location*' (660 Albany Shaker Rd, Albany, NY 12211, USA), 'Currency*' (US, Dollar), 'Amount*' (0.00), 'Comment' (0), 'Personal*' (a toggle switch that is currently turned off), 'Department/Committee*' (Executive Board), and 'Meal Expense Location'. A red arrow points from the 'Save Expense' text to the 'Save' button at the top right. Another red arrow points from the 'Do NOT check the Personal box!' text to the 'Personal*' toggle switch.

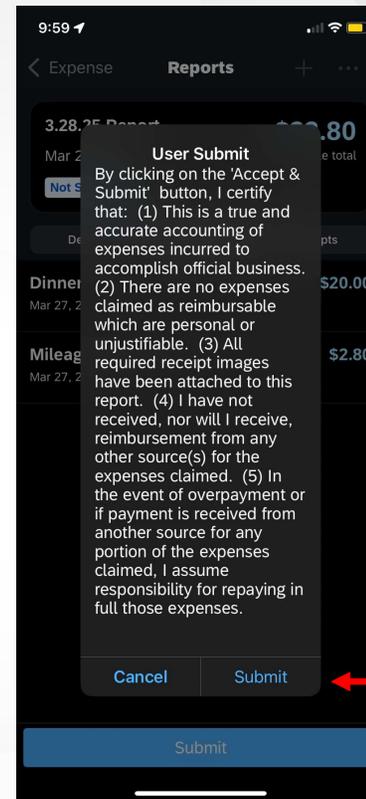
Save Expense

Do **NOT** check the Personal box!

Submitting Report



Once you have entered all expenses for that specific meeting, you may click the **Submit** on the bottom



Click **Submit** again and you have successfully submitted the expense!

Submitting Report



Once the report is submitted, it will automatically be sent to the proper individual for approval.

When the report has received proper approval, the Finance Department will send a check to your home address on file.

If you prefer direct deposit, please give Danielle a call at 518-785-1900x257 to set it up.