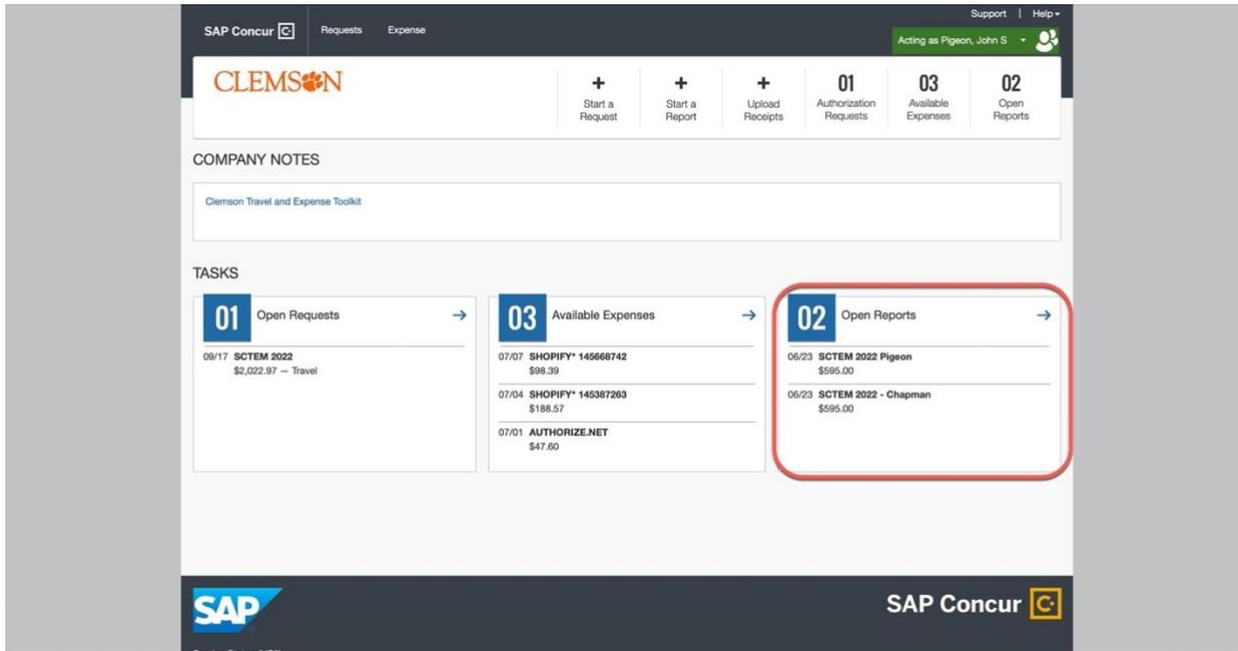


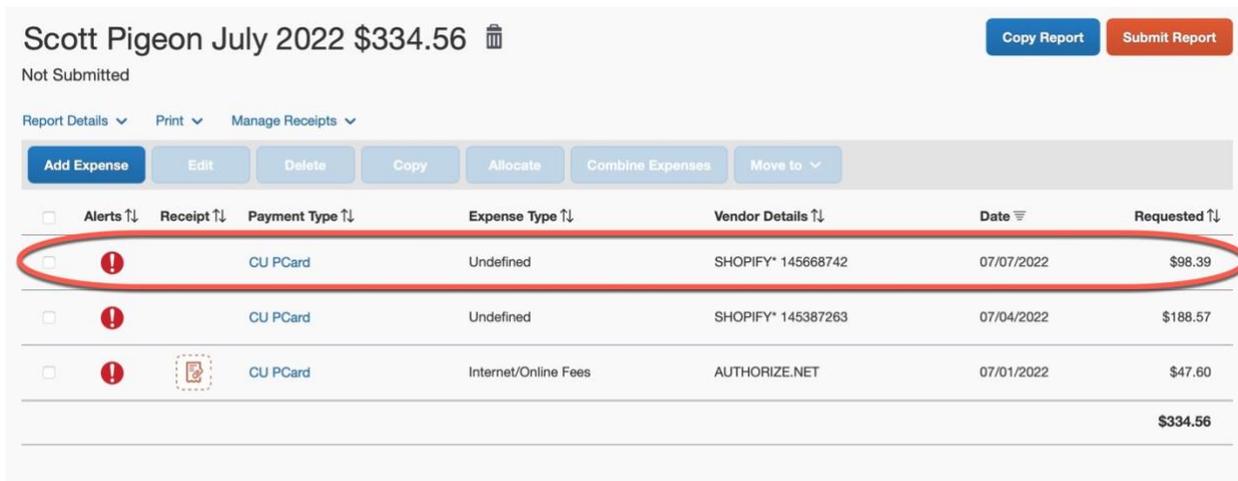
How to Allocate Charges in Concur

1. Once logged into Concur, either create a new expense report or open an existing one:



The screenshot shows the SAP Concur dashboard. At the top, there are navigation tabs for 'Requests' and 'Expense'. Below the navigation, there are three main task cards: '01 Open Requests', '03 Available Expenses', and '02 Open Reports'. The '02 Open Reports' card is highlighted with a red border. It lists two reports: '06/23 SCTEM 2022 Pigeon' for \$595.00 and '06/23 SCTEM 2022 - Chapman' for \$595.00.

2. Click anywhere in a line item to open the transaction:



The screenshot shows a Concur expense report for Scott Pigeon, July 2022, totaling \$334.56. The report is not submitted. The report details include 'Report Details', 'Print', and 'Manage Receipts'. Below the report details, there are buttons for 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. The main table of line items is as follows:

<input type="checkbox"/>	Alerts ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date	Requested ↑↓
<input type="checkbox"/>	!		CU PCard	Undefined	SHOPIFY* 145668742	07/07/2022	\$98.39
<input type="checkbox"/>	!		CU PCard	Undefined	SHOPIFY* 145387263	07/04/2022	\$188.57
<input type="checkbox"/>	!		CU PCard	Internet/Online Fees	AUTHORIZE.NET	07/01/2022	\$47.60
							\$334.56

3. Click “allocate” underneath the expense type:

The screenshot shows the 'Manage Expenses' interface for an expense titled 'Internet/Online Fees \$98.39'. The 'Details' tab is active. The 'Allocate' button is highlighted with a red box. The form includes fields for Expense Type (Internet/Online Fees), Transaction Date (07/07/2022), Trip Purpose (z-Other Purpose), Payment Type (CU PCard), Amount (98.39), and Currency (US, Dollar). There is also a 'Save Expense' button and a 'Cancel' button.

4. Once in the allocation window, click add:

The screenshot shows the 'Allocate' window in SAP Concur. The window title is 'Allocate' and it shows 'Expenses: 1 | \$98.39'. The window contains a table with columns 'Percent' and 'Amount'. The table shows a single row for the expense with 100% allocated and 0% remaining. Below the table, the 'Add' button is highlighted with a red box. The window also includes 'Edit', 'Remove', and 'Save as Favorite' buttons. At the bottom, there is a 'No Allocations' message and a 'Save' button.

Percent	Amount
100%	Allocated \$98.39
0%	Remaining \$0.00

5. Begin selecting the appropriate chart fields by following the order. Your choices will differ depending on what business unit and department you choose.

Add Allocation

+ New Allocation **★ Favorite Allocations**

* Required field

Business Unit * 1

Department * 2

Fund * ? 3

Program *

Cancel **Save**

6. Once you fill in all the fields, click save.
 - a. TIP: You can click the check box beside the allocation and click “Save As Favorite” to use in the future without having to retype all the information.

Allocate

Expenses: 1 | \$98.39 | View Allocation Group

Percent | Amount

Amount: \$98.39 | Allocated \$98.39 (100%) | Remaining \$0.00 (0%)

Default Allocation

Code: Default | Percent %: 0

Add **Edit** **Remove** **Save as Favorite**

<input type="checkbox"/>	Business Unit	Department	Fund	Program	Class	Project/Grant	Code	Percent %
<input checked="" type="checkbox"/>	Clemson University	Business Services	CU - Auxiliaries	Insp: Gen Admin&Logistic Serv	Sales & Services - Ed Depts	Clemson Blue Cheese	CU-5332-16-803-155-1600136	100

Cancel **Save**

7. After you have allocated an expense line you will see the word “allocated” under the dollar amount:

Scott Pigeon July 2022 \$334.56 

Not Submitted Copy Report Submit Report

Report Details Print Manage Receipts

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

<input type="checkbox"/>	Alerts <input type="checkbox"/>	Receipt <input type="checkbox"/>	Payment Type <input type="checkbox"/>	Expense Type <input type="checkbox"/>	Vendor Details <input type="checkbox"/>	Date <input type="checkbox"/>	Requested <input type="checkbox"/>
<input type="checkbox"/>			CU PCard	Internet/Online Fees	SHOPIFY* 145668742	07/07/2022	\$98.39 Allocated
<input type="checkbox"/>			CU PCard	Undefined	SHOPIFY* 145387263	07/04/2022	\$188.57
<input type="checkbox"/>			CU PCard	Internet/Online Fees	AUTHORIZE.NET	07/01/2022	\$47.60
							\$334.56