Creating a New Expense Report: Business Meal Reimbursement
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When you need to create an expense report to be reimbursed for a business meal, you can start the report either from the **Quick Task Bar** or the **Expense** tab on the menu bar. The screen shot below reflects the **Quick Task Bar** option.

1. Place your mouse pointer over **New**, then click **Start a Report**.

![Image of Concur interface]

2. Complete the required and optional **Report Header** fields as appropriate on the **Report Header** page (required fields are indicated by a red asterisk).
   a. Under **Report Type**, select **CU Non-Travel**.
   b. Under **Report Name MM/YYYY**, enter a name for your expense report, followed by the month and year the charge was incurred.
   c. For the **Business Unit**, **Department**, **Fund**, and **Project/Grant** fields, enter the appropriate information for your charge. If the **Program** and **Class** are also known, feel free to complete those fields as well.
   d. If you would like to provide additional notes for this reimbursement request, those notes should be included in the **Additional Information** field.
3. Click **Create Report**.
4. On the next screen, click **Add Expense**.

5. In the pop up that appears, scroll through the list to find **Business Meals** under section **04. Meal Expenses** and click on it.
6. Once the expense type is selected, complete the required fields for the expense type details.
   a. Under **Transaction Date**, enter the date the meal was purchased.
   b. Under **Vendor**, enter the location where the meal occurred.
   c. Under **City of Purchase**, enter the City and State (or country) where the meal occurred.
   d. Under **Payment Type**, select **Employee Paid**.
   e. Under **Amount**, enter the amount to be reimbursed (the amount of the charge).
   f. Under **Currency**, confirm that US, Dollar is correct (only adjust if the purchase was made outside of the United States: if so, select the correct country and currency where the purchase was made).
   g. If desired, enter any additional comments within the **Comment** box.
7. Once these fields are completed, click on the Attendees (1) button. In the pop up, click on the Add button to add the attendees’ name(s).
8. In the additional pop up, click on the **Attendees** button.

9. Add the names of the individuals who attended the business meal.
   a. Adding Employees:
      i. For employees, choose the **Employee** dropdown under **Attendee Type** and use the space to the right to type in the employee’s name and search (you can search using either a first or a last name).
ii. Once you have found the correct employee, click on his/her name to select. A confirmation message will pop up to say that the employee has been added.

b. Adding Guests:
   i. For guests, choose the Guest dropdown under Attendee Type. If the guest is new to Clemson and the system, click the Create New Attendee button.
ii. Enter the attendee’s information and click Create Attendee.

Create New Attendee

Go back

Attendee Type *

Last Name *

Guest

Mouse

First Name *

Affiliation / School *

Mickey

Disney

Job Title

Mascot

Cancel Create Attendee

iii. The screen will confirm the attendee is added. Once you have created all of your new guests, click Go back to return to the attendees screen.

Create New Attendee

Go back

Attendee added: Mickey Mouse

Attendee Type *

Last Name *

Guest

Mouse

First Name *

Affiliation / School *

Mickey

Disney

Job Title

Mascot

Cancel Create Attendee

8
iv. If the guest is not new/has visited before, enter the guest’s last name or first name into the guest fields and click **Search**.

v. When the list of names appears, click on the box next to the attendee desired and click **Add to List**.

10. Once all attendees are listed, click **Save**.
11. Before saving the expense, click on the **Upload Receipt Image**.

![Expense Form](image)

12. If you haven't already, scan and save your receipt to your computer. Within the pop up that appears, click the **Upload Receipt Image** box.
13. In the new pop up, find where your receipt is saved on your computer, select the receipt image, and click **Open**.

14. The receipt should now appear on your New Expense screen.
   a. If you only have one business meal expense that needs to be reimbursed or have added all expenses, click the **Save Expense** button.
   b. If you have another business meal expense, click the **Save and Add Another** button, then repeat steps 5-14.
15. Once all reimbursement expenses are included, click **Submit Report**.

16. A pop up will appear to confirm accountability for these expenses. Please read through the list of certified statements, confirm their accuracy, and if correct, click **Accept & Continue**.
17. A final pop up will appear with a summary of the expenses/reimbursement you are requesting. Confirm everything is accurate, and click **Submit Report**.