

Creating a Guest/Visitor Reimbursement

When is a guest/visitor reimbursement used?

This form is used when reimbursing guests/visitors for expenses incurred when on Clemson University business. For more information about reimbursing guests/visitors and when this form is used, <u>click here</u>.

Step One: Log into <u>Concur</u> using the SSO login.

Step Two: Click Expense either in the top menu bar or click +New and then Start a Report.

SAP Concur 🖸	Requests	Travel	Expense	Approvals	Reporting -	App Center		New Theme (i)	Administi	ration • Help • Profile • 🔍
CLEMS	N					+ New	DO Required Approvals	Authorization Requests	01 Available Expenses	DO Open Reports
TRIP SEARCH			COM	PANY NOT	ES					
Booking for myself	Book for a gue	st	Clems	son Travel and E	xpense Toolkit					
*9 🛱 🛏			Welcome to Concur Travel & Expense for Clemson University!							
Please select your preferred from the drop down menu automatically search for flig	departure and return s provided below. Th ht options within +/-	n flight times ne tool will - 8 hours of	Cone	cur Reports Delegate Repo	- Last Generat	ed 2023-05-19 to have delegates a	8:00 AM and what permis	sions those delegates I	nave.	_
your selected preferred ti	mes. You may adjus	t this +/-								Read more

Step Three: Click **Create Report**. For **Report Type** choose **Guest/Visitor Reimbursement**. Fill out all the required information and click **Create Report**.

Note: If you are not sure of the 23-digit account codes you should be using, please contact your Department Aps for assistance.

с	reate New Report			×
	breate From an Approved Request Report Type * 04. Guest / Visitor Reimbursement ~)	Description of Reimbursement *	* Required field
	Trip Type None Selected ~]		
	Business Unit *		Department	0
	Fund @ 0		Program *	
				~
e	Class *	ſ	Project/Grant	0
	Additional Information	J		
	1			
K			Cancel	Create Report

Step Four: Click **Add** to begin adding the expense types that best match what you are requesting reimbursement for. Scroll through the list to select your choice or begin typing to find your desired selection.

SAP Concur C Requests Travel Expension	Add Expense		×	
Manage Expenses View Transactions Process Repor				
	1 Available Expenses Crea	te New Expense		
John Smith Interview May 20				
Not Submitted Report Number: K4C11V	Search for an expense type	e		
Report Details V Print/Share V Manage P opts V	 Recently Used 			
Add Expense Delete Co	Airfare			
	 01. Travel & Transportation 	n		
	Airfare			
	Car Rental			
	Guest/Visitor Mileage -	Current Calendar Year		
	Lodging - Other Accon	nmodations		
	1			
	_		//	

Step Five: Once you've selected an expense type, the form will open. Begin completing all the required fields marked with a red asterisk.

Note: When reimbursing a guest/visitor, payment type should be **<u>Payment to Non-Supplier</u>**.

SAP Concur C Requests Travel Exp	pense Appr	ovals Reporting -	App Center		New Therne 🧃 Adm	inistration - Profile	Help -
Manage Expenses View Transactions Process R	eports						~
New Expense					Canc	el Save Ex	xpense
Details Itemizations						Hide Rece	eipt 🗐
Allocate				* Required field			
Expense Type *							
Airfare				~			
Transaction Date *		Business Purpose *					
05/22/2023		Employee Recruit	ment	~			
Trip Type *		Traveler Type *					
3. Out of State	~	Guest / Visitor		~	<u>↑</u>		
Airline Vendor *		Class of Service *			Add Receipt		
Delta Air Lines	~	1. Economy/Coac	h Class	~	Click to upload or drag and drop files to upload a new rece Valid file types for upload are paging inc. inc. and tif or	ipt.	
Payment Type *					5MB limit per file.		
Payment to Non-Supplier	~						
Amount *		Currency *					
550.00		US, Dollar		~			
Comment							
					L		
				19			

Step Six: Next you need to attach a receipt. Click **Upload Receipt Image**. You have the option to upload a receipt from your computer or choose from any **Available Receipts** (see training aid here for more info).

Attach Receipt			×
Select a receipt image or reu	use one from this report	:	
Available Receipts	Receipts in Repo	rt	
Drag and drop files to up	load a new receipt. Valio	d file types for upload are .png, .jpg, .jpeg,	, .pdf, .tif or .tiff.
989F59FB8D2E457FB3 Uploaded: 05/11/2023	365EFD0EDAA0D 7:43 PM	RECEIPT COMING SOON.pdf Uploaded: 08/18/2022 1:12 PM	
Minimum control of the strategies.	No. Horner Constrainty 40 Anne Anne 100 Horner Constrainty 110 Horner Constrainty	M CRIMT COMME RECOL POINTING THATCH HAD IN VIOLATING CO	
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			Close

Step Seven: Once you have filled out all required information on the expense and added a receipt, click **Save Expense**.

Steven Eight: Click **Add** and add the **Non-Supplier Payment Information** form. This is the form where you will enter the guest/visitor's payment information.

SAP Concur C Requests Travel Expense	Add Expense		×
Manage Expenses View Transactions Process Report	1 Available Expenses	+ Create New Expense	
Not Submitted Report Number: IM206U	Search for an exper	nse type	
Report Details - Print/Share - Manage Receipts -	Aux:Contract T	owing	
Add Expense Edit Delete Co	Aux:Parking Ci Deposits Held	tations for Others	
□ Receipt 1↓ Payment Type 1↓	Refund to Gran	ntors	
Payment to Non-Supplier	Refunds University Juro	r Expenses	
	 98. Non-Supplier Non-Supplier F 	Porms	

Step Nine: Add the guest/visitor's name and information for their reimbursement and click **Save Expense** when finished.

Note: A receipt is not required for this form.

New Expens	e				Cancel	Save Exper	nse
Details	Itemizations					Hide Receipt	E
Allocate				* Required field			
Expense Type *							
Non-Supplier Payn	nent information			•			
Request Date *			Guest / Visitor Type *				
05/22/2023			Individual	~			
Purpose of Reimbursem	ent *		Method of Payment *				
Candidate Travel Reimbursement ~		Check	<u></u>				
Email Address * 🚱		Name of Guest / Visitor (Last, First) * 🚱		Add Receipt			
johnsmith123@gmail.com		Smith, John Click to upload or drag and drop files to upload Valid file types for upload are .png, .jpg, .jpg, .j					
Check Mailing Address 1	Check Mailing Address 1 *		Check Mailing Address 2		5MB limit per file.		
123 Tiger Way	123 Tiger Way						
City, State *			Zip Code *				
Clemson, South Ca	arolina	× ~	29634				
Payment Type * 🚱							
Payment to Non-S	upplier	~					

Step Ten: Click **Submit Report** once all expenses have been added that require reimbursement. Once a report has reached all approvals in Concur it will pay out on the following Thursday.