

Uploading and Attaching Receipts

What is the Available Receipts area?

The Available Receipts area is a feature within Concur that stores documents in which you can email or upload images. You can use these images to attach to individual expenses within a report.

Note for delegates: You can view someone else's Available Receipts area if you were granted permission to view receipts when identified as his or her delegate.

Adding Images to Your Available Receipts Area

There are three ways to add images to your Available Receipts Area:

- 1. Upload images directly to your Available Receipts area.
 - a. On the Concur homepage, click Expense from the top menu bar.

	[Administ	Administration - Help -	
SAP Concur 🖸 Req	uests Travel	Expense Appr	ovals Reporting -	App Center		Off OD		Profile 🝷 💄	
CLEMS	T			+ New	00 Required Approvals	01 Authorization Requests	00 Available Expenses	02 Open Reports	
TRIP SEARCH		COMPANY	NOTES						
Booking for myself Book	c for a guest	Clemson Trave	and Expense Toolkit						
🛪 🛛 🖙 📮 Welcome to Concur Travel & Expense for Clemson University!						ersity!			
Please select your preferred departu from the drop down menus provid		Traveler Pr	ofile Notes (read i	more below)					

b. Scroll down to the bottom of the page and click Upload Receipt Image. From there you can choose which files you want to upload from your computer.

AVAILABLE EXPENSES View:	All Expenses 🗸
	No Expenses When expenses come in, they will be added to this list.
AVAILABLE RECEIPTS	7
<u>↑</u> Upload Receipt Image 5MB limit per file	

*Note: Receipts that you have uploaded will stay in your Available Expenses tab and show as *Pending Card Transaction* until they are attached to an expense report. A payment type of Pending Card Transaction means Concur has identified a receipt that hasn't been paired to a corporate card expense sent in from Bank of America.

2. Email images of receipts or forward emails of receipts (receipts can either be attached to the email or embedded in the email content) to <u>receipts@expenseit.com</u>.

*Note: Before sending emails to <u>receipts@expenseit.com</u>, you must first verify your email address. Refer to the end of this document for instructions.

- 3. Use Concur Mobile (available for IOS and Android) to take pictures of receipts, which are then stored in your Available Receipts area automatically.
 - a. Download the mobile app on your mobile device here
 - b. Open the app and click Sign In

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Sign In	

c. Type in Clemson email and click Sign In



d. Click Sign in with Clemson University. This will take you to enter your Clemson credentials and use Duo to authenticate.



e. On the app homepage click Expenselt at the bottom center of the page.



f. This opens the camera inside the app where you can take a photo of your receipt. Once you've taken the photo it immediately uploads into your profile both in the app and web browser.

Attaching Images to Individual Expenses Using Your Available Receipt Area

The first step was to create your expense report and complete the Report Header. Then, expenses were added to your report and allocated. Now it is time to attach images within your Available Receipts area to your expenses.

New York 2022 \$1,657.19 D Not Submitted Report Details ~ Print ~ Manage Receipts ~ Travel Allowance ~						Copy Report	Submit Report
Add	Expense						
	Alerts↑↓	Receipt↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date =	Requested ↑↓
	▲		TEST CU PCard	Car Rental Fuel	*Enterprise Anderson, Indiana	05/23/2022	\$678.00
			TEST CU PCard	Airfare	Interair Anderson, Indiana	05/22/2022	\$907.98

1. Once you have created/opened your expense report, click on any of the line items

Details	Itemizations		Hide Receipt
Allocate Expense Type*		* Required field	
Car Rental Fuel		~	
Transaction Date *		Trip Purpose *	
05/23/2022		Business Meeting/Event ~	
Trip Type *		City of Purchase	
3. Out of State	~	🕲 🖌 Anderson, Indiana	
Payment Type			8
TEST CU PCard			Upload Receipt Image
Amount		Currency	
678.00		US, Dollar	
Comment			
		ß	
Save Expense Ca	ancel		

- 2. Click on Upload Receipt Image on the right-hand side
- 3. You can either choose from receipts that you have uploaded to Concur or upload a new receipt image from your computer. You can also choose Missing Receipt Declaration if you do not have a receipt. From this screen you can choose to View the receipt or Attach it to the expense report.



Detaching Images from Individual Expense

1. Open the expense report and click Manage Receipts then Manage Attachments below the report header.

	v Yorł	x 2022	\$1,657.19	9 🟛		Copy Report	Submit Report
Report D	letails 🗸	Print 🗸 👖	Manage Receipts 🗸	Travel Allowance 🗸			
Add	Expense						
	Alerts ↑↓	Receipt↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date 😇	Requested ↑↓
		FOR Second	TEST CU PCard	Car Rental Fuel	*Enterprise Anderson, Indiana	05/23/2022	\$678.00
			TEST CU PCard	Airfare	Interair Anderson, Indiana	05/22/2022	\$907.98
			TEST CU PCard	Taxi/Ride Share	Taxicabs and Limousines Anderson, Indiana	05/20/2022	\$71.21
							\$1,657.19

2. Click Delete



Deleting Images from Your Available Receipts Area

Note: If the image is attached to an individual expense, it must first be detached before you can delete it from your Available Receipts area (see above).

- 1. Click your Expense tab on the top menu bar on the homepage.
- Scroll down to see Available Expenses *You can only delete lines that say *Pending Card Transaction* next to them*
- 3. Check the boxes next to the receipts you wish to delete and click Delete.
- 4. A confirmation message will appear, click Yes to delete.

Verifying Your Email Address

Before sending emails to <u>receipts@expenseit.com</u>, you must first verify your email address. This is necessary for Concur to associate information sent from your email address to your Concur account and upload into your Available Receipts area.

- 1. Click your profile in the top right-hand corner and then Profile Settings.
 - a. Click Email Addresses on the left-hand side menu bar.
 - b. On your CU email address, select Verify.
 - c. Check your email for a verification message from Concur.
 - d. **Copy the code** from the email and **paste into the Enter Code field** next to the email address back in the Concur profile email addresses section.
 - e. Select **OK** to submit the code and complete verification. Your email will now show as verified in green.