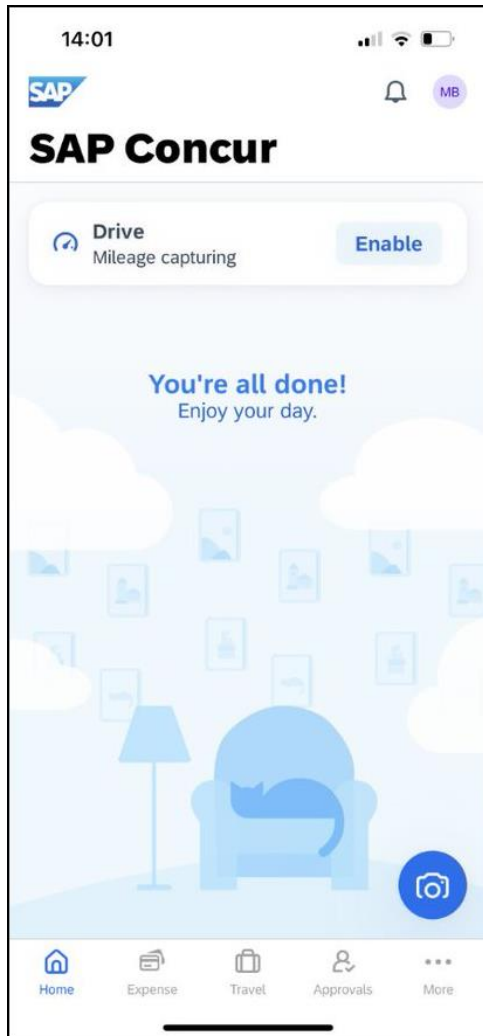| **Mobile App User Guide** **Concur Expense**	This guide describes the current version, which is shown on the "Introduction" guide.	Applies to these mobile devices:
		Yes: iPhone
		No: iPad
		No: Android

IMPORTANT: Be aware that your company's configuration may not allow for all of the features described here. Generally, if a feature is not available in your configuration of the web version of SAP Concur, then it is not available in the mobile app.

Concur Expense simplifies creating expense reports. For example, creating expense reports is simplified when charges from credit cards, select suppliers, and receipt photos pre-populate in Concur Expense.

Concur Expense provides the following services:

- Automatically categorizes and map expenses based on receipt.
- Streamlines expense management.
- Enforces policy compliance.
- Reimburse employees faster.

Please Note:

- The SAP Concur app for iOS and Android supports universal links, i.e. links that navigate directly to the app if it is installed or to the website if not.

  - Such links are included in notification emails from SAP Concur related to the expense report changes.

  - Universal link support for customers own use is currently not supported.

- Some security solutions may block the links embedded into email from opening the app directly. The proper exceptions for the security policy should be configured for SAP Concur universal link URLs (pattern to match: https://*.concursolutions.com/*). Known cases are:

  - MDM/MAM policy that prescribes to open any link tapped in Outlook mobile app only in specified browser.

  - Outlook mail server phishing protection that wraps all link embedded into e-mails to open the safety check service first.

Concur Expense

Expense List (Expenses Screen)

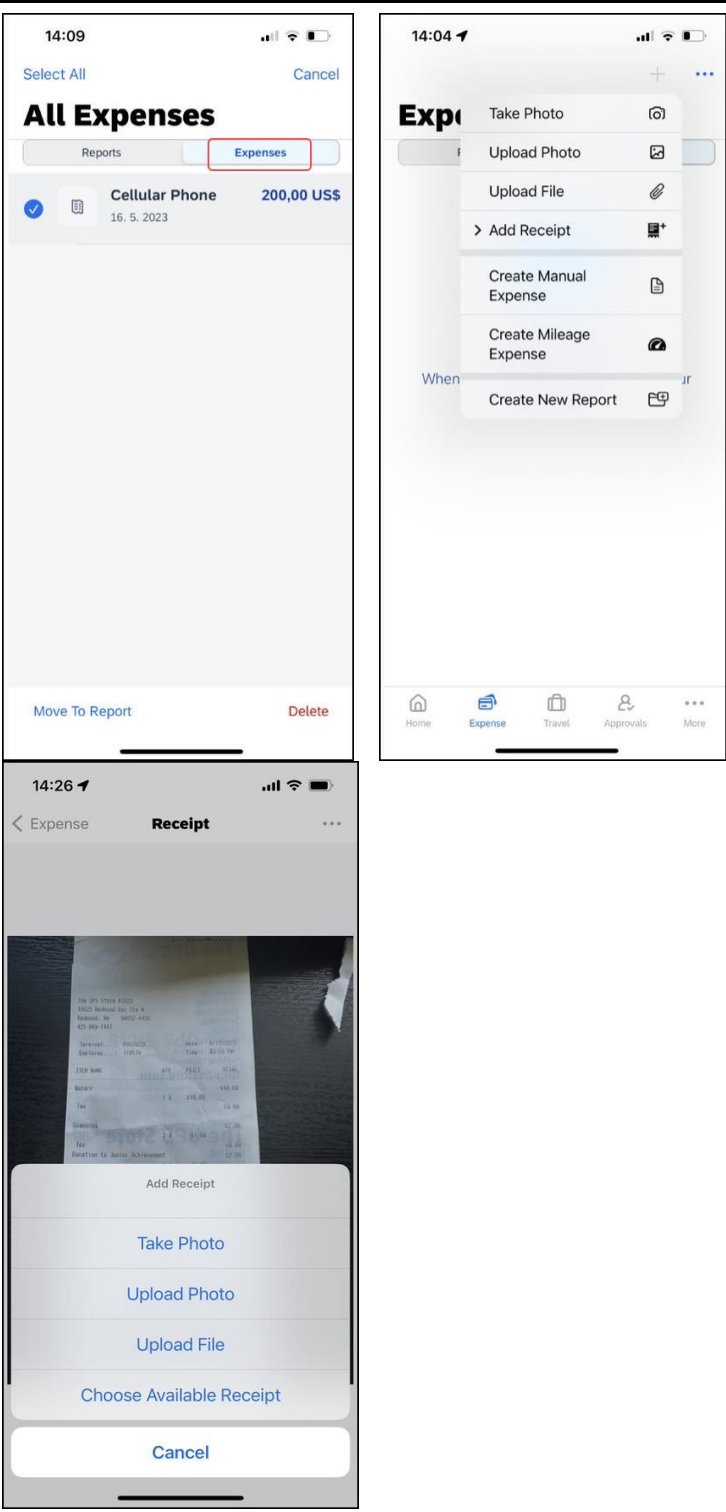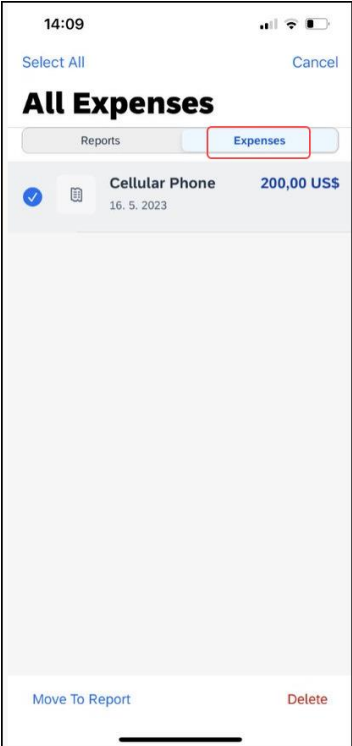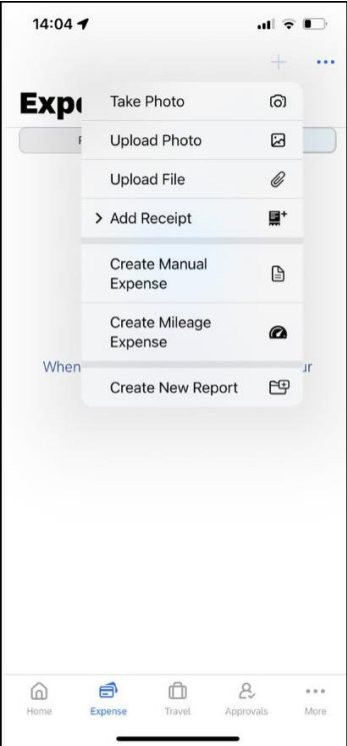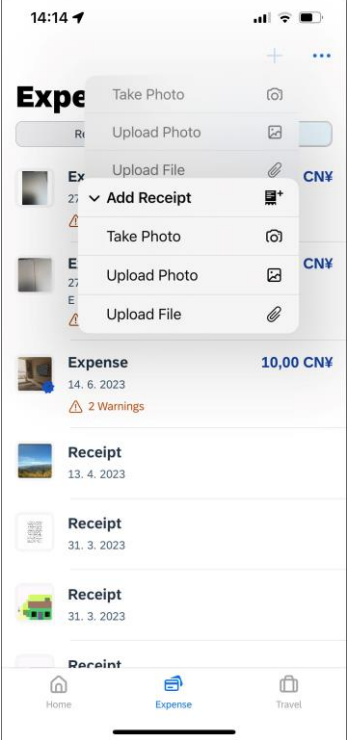| Screen(s)	Description/Action

14:09
Select All   Cancel
All Expenses
Reports   Expenses
☑ 📄 **Cellular Phone**   **200,00 US$**
16. 5. 2023
 	
Move To Report   Delete
	On the home screen, tap **Expense** and toggle to **Expenses** to access your list of expenses. Use the **All Expenses** screen to:
	
	• Add, view, edit, and delete *mobile* expenses. Mobile expenses are designed to be quick and easy.
	
	   ♦ To make more extensive features like itemizations and attendees, either:
	
	   – Add the *mobile* expense to an expense report by selecting **Move To Report** then edit.
	
	   – Create the expense on an open expense report and then edit.
	
	   – For car mileage/kilometers expenses, tap **Expenses** on the home screen. An option will appear **Create a Mileage Expense**.
	
	• View and make minimal edits to card transactions, which appear with the ▭ icon.
	
	   ♦ To make more extensive edits, add the card transaction to an expense report then edit.
	
	   ♦ To *delete* a card transaction, use the web version of Expense, if your company allows you to delete card transactions.
	
	• View e-receipts, which can be edited once attached to a report.
	
	• Attach expenses – *mobile* expenses, e-receipts, and card transactions – to a new or existing expense report.

Expense Report Lists

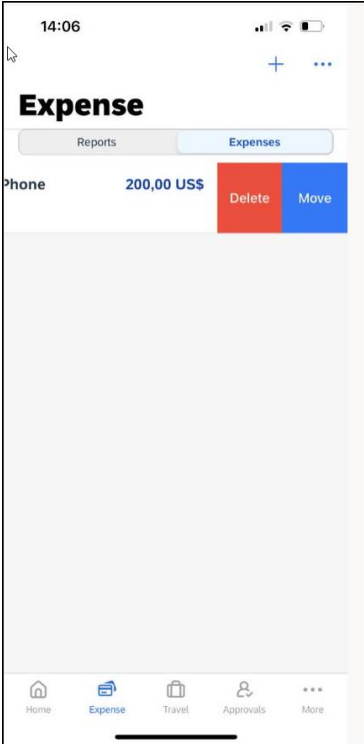| Screen(s)		Description/Action
		On the home screen, tap **Expense** to access the list of expenses and toggle to **Reports**. On the **Reports** screen, you can view up to 100 expense reports in each of the **Reports** main screen or **History** tabs. On the **Reports** screen, you can: • View unsubmitted, submitted, and returned reports • Create a new report • Copy reports • Delete unsubmitted reports • View red **Alert** and yellow **Warning** signs on reports flagged for exceptions • View the name, status, date and amount of each report **NOTE:** All active reports are separated into **Unsubmitted**, **Submitted**, and **Other** sections. Within each category, the reports are sorted by report date.
		You can open an existing expense report and: • View and edit the report summary (report header) • View and attach receipt images • View, add, import, match, edit (add attendees and itemizations), and remove expenses • Submit your report To access the **Reports History** tab, tap the ⋯ icon at the top right hand corner: • View reports that have been approved and sent for payment • View red **Alert** and yellow **Warning** signs on reports flagged for exceptions • Copy reports

Create a Mobile Expense

Screen(s)			Description/Action
			To create a *mobile* expense: - On the home screen, tap **Expense** on the bottom bar. This will redirect to the **Expense** screen. - Then, toggle to **Expenses**. This will display the **All Expenses** screen. Tap ⊞ and select the expense type to create a Manual Expense. Then: 1) On the **Expense** screen, fill in the fields and make the desired selections. 2) Tap the receipt icon. 3) Take a picture of the receipt or grab an existing image from **Upload Photo, Upload File** or **Choose Available Receipt**. 4) Tap **Save**. **NOTE:** For more information on how to work with receipts, refer to the *Receipt* user guide. **NOTE:** You cannot create a **Japan Public Transportation** expense outside of an expense report.

Add Receipt Functionality
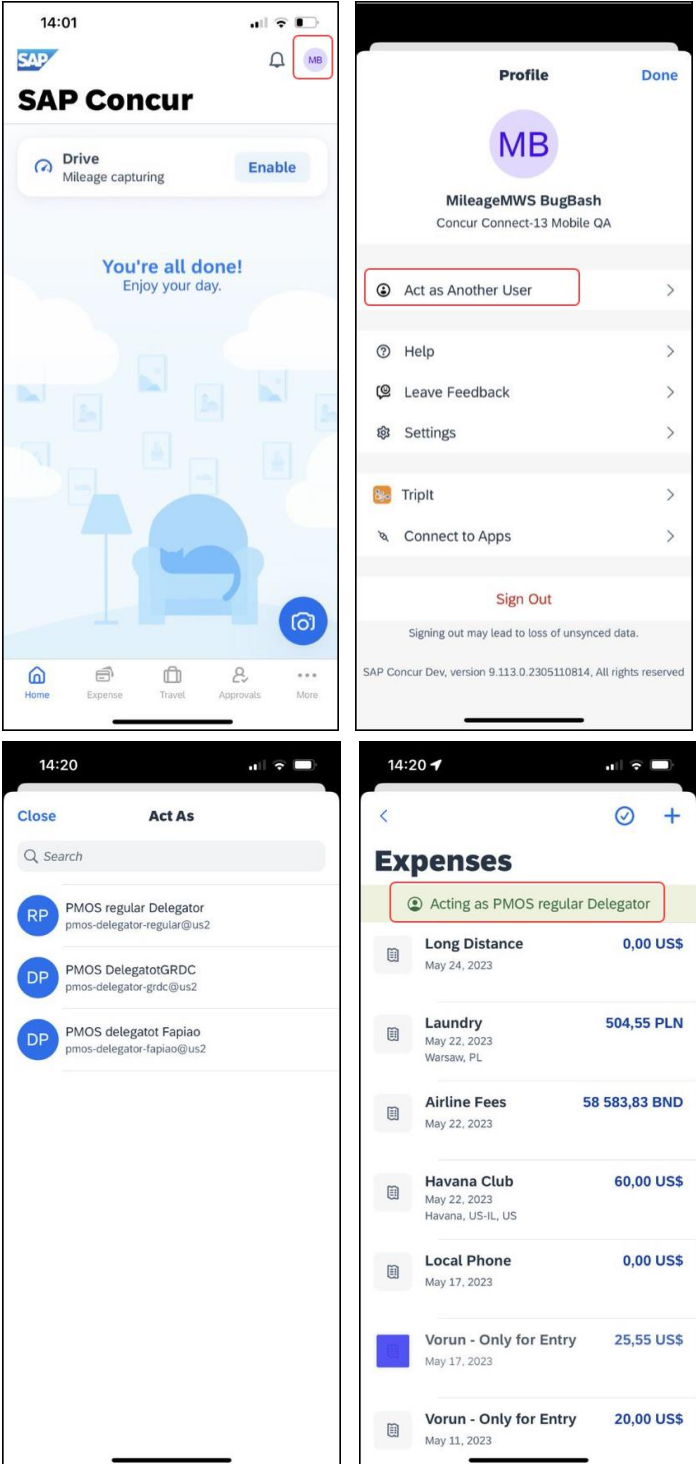
Screen(s)	Description/Action
	To see the full functionality for creating expenses, the **Add Receipt** can be dropped down to reveal more options. To access this: • On the home screen, tap **Expense** on the bottom bar. This will redirect to the **Expense** screen. • Then, toggle to **Expenses**. This will display the **All Expenses** screen. Tap and select the expense type to create a Manual Expense. A drop down will reveal more options: • **Take Photo** opens the camera to take a photo of a receipt directly. • **Upload Photo** opens the photo gallery on your device to upload a photo of a saved receipt. • **Upload File** allows you to select a file on the mobile device.

Delete a Single Mobile Expense

Screen(s)	Description/Action
	To delete one or more *mobile* expenses from the **Expenses** screen: 1) On the **Expense** screen, swipe the desired expense to the left. 2) Tap **Delete**. **NOTE:** You can also delete a *mobile* expense in the web version of SAP Concur. **NOTE:** To delete a *card* transaction, use the web version of Concur Expense - if your company allows you to delete card transactions.
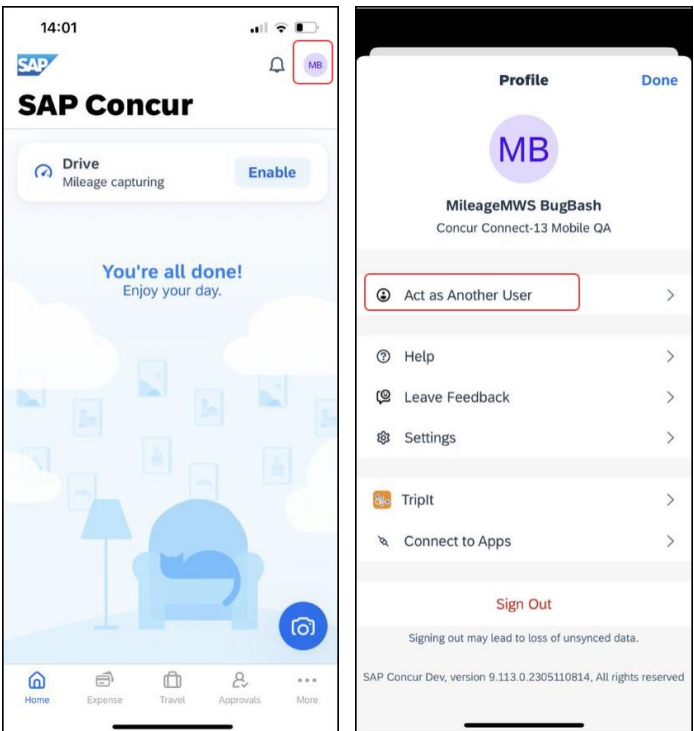
NOTE: GRDC users with ExpenseIt, can still act on behalf of another user in ExpenseIt, but will not be able to create, edit or delete manual expenses.
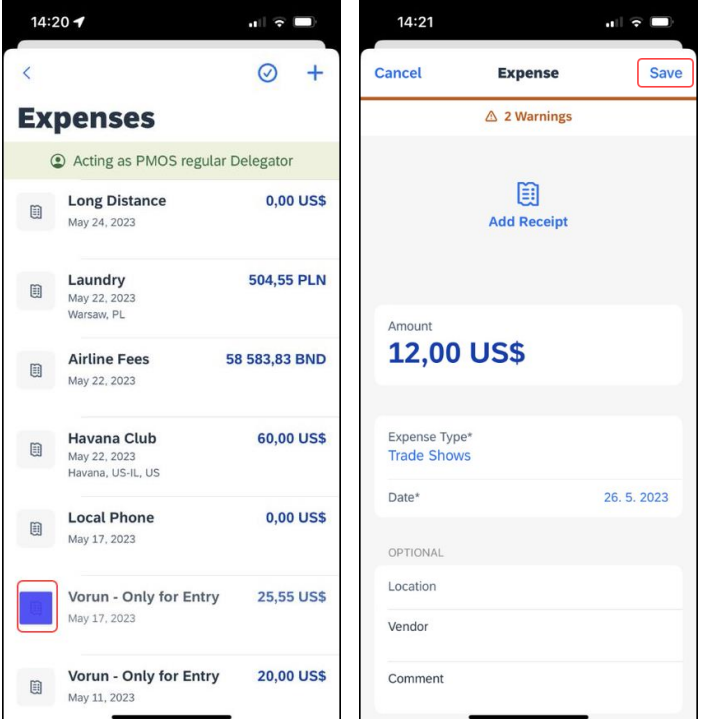
Screen(s)	Description/Action
	To Create an Expense While Using the Delegate Function: 1) Tap the initials in the top right corner, to open the **Profile** page. Then tap **Act as Another User.** A list of potential delegates will appear. Once the user you wish to act on behalf of is selected, it will be indicated by a green banner. You will also be directed to the **Expenses** Screen.

Screen(s)	Description/Action
	2) Tap the plus button and the **ExpenseIt** option will appear. Tap this option and you will be able to select the receipt to be added as an expense. Once added, the selected receipt appears in the **Expenses** screen.
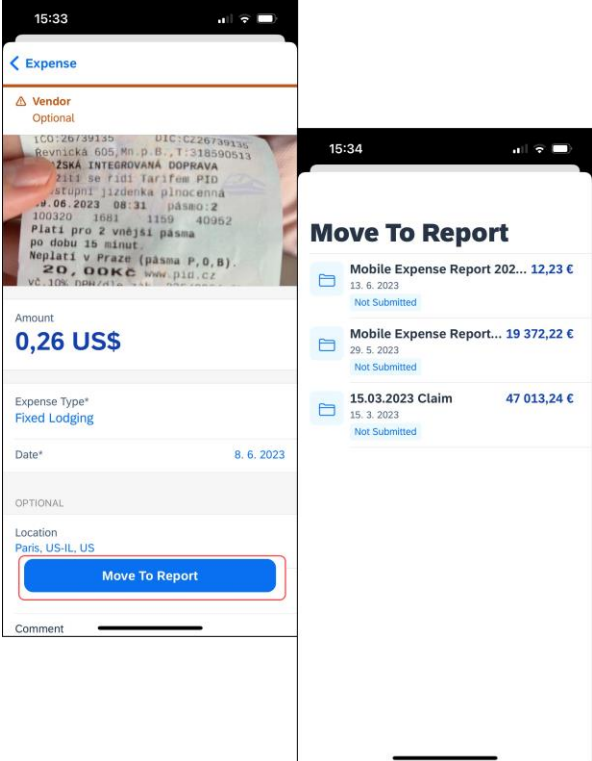
Using Delegate Function to Edit Expenses

Screen(s)	Description/Action
	To Edit an Expense While Using the Delegate Function: 1) Tap the **Menu** button and then tap **Act as Another User.** Once the user you wish to act on behalf of is selected, it will be indicated by a green banner. You will also be directed to the **Expenses** Screen.

Screen(s)		Description/Action
		2) Once on the **Expenses** page, select the Expense that needs to be edited and this will direct you to the details of this expense. Tap on the areas that need to be edited. Once the edits are made, tap **Save** for the edits to be reflected.
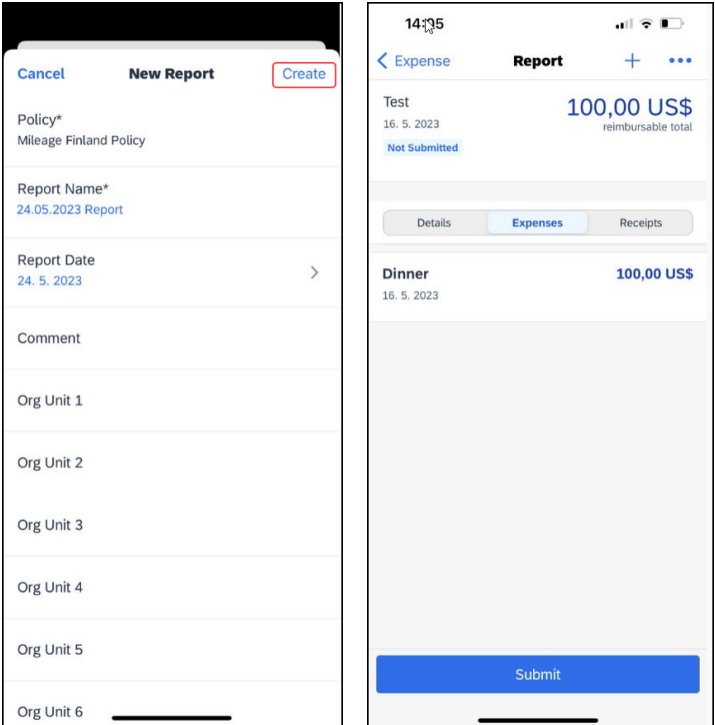
Using Delegate Function to Move Expenses

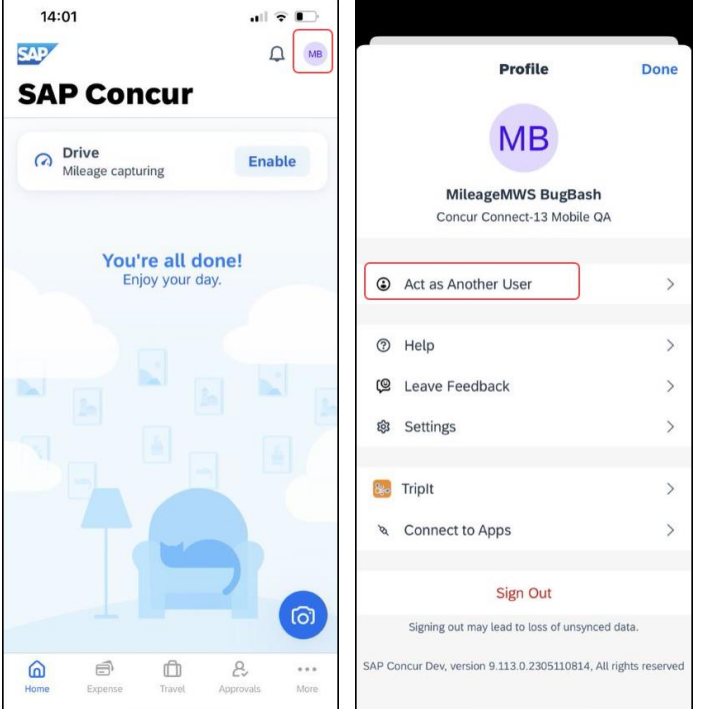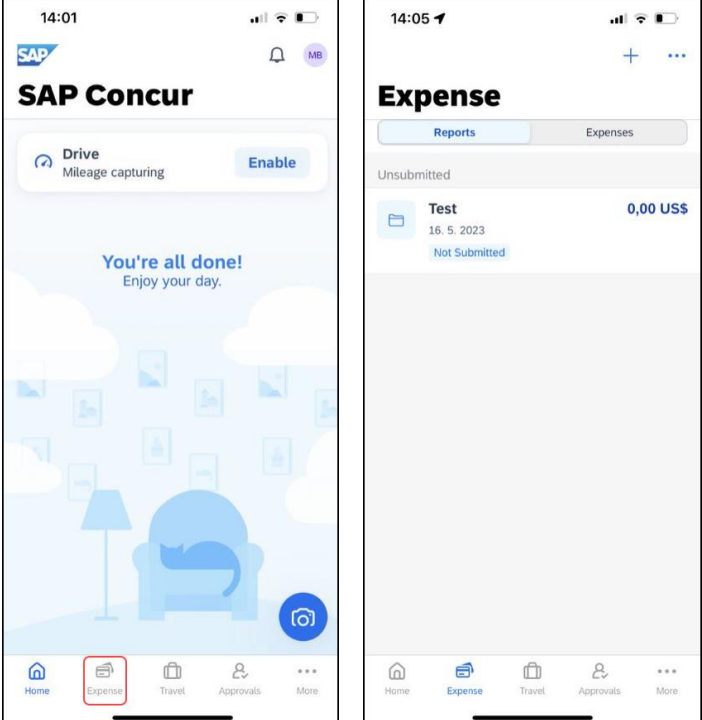| Screen(s)		Description/Action
		To Edit an Expense While Using the Delegate Function: 1) Tap the **Menu** button and then tap **Act as Another User.** Once the user you wish to act on behalf of is selected, it will be indicated by a green banner. You will also be directed to the **Expenses** Screen.

Screen(s)	Description/Action
	2) To move an expense to a report, select the desired expense. Once the expense opens, at the bottom of the screen there is a prompt Move to Report. This opens the list of reports and from there you can select the report that you want to move the expense to. Once the expense has been moved to the desired report, it w ill no longer appear in the list of expenses.
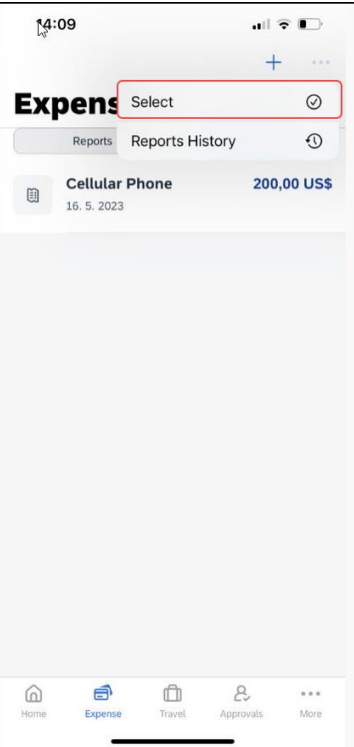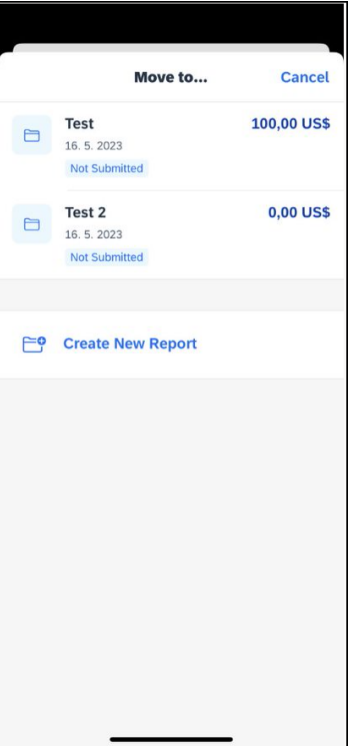
Create a New Expense Report

Screen(s)	Description/Action
	You can create a new report: • From the home screen tap **Expense**,you will be redirected to the **Expense** page. From there, you can toggle to **Reports**. • While adding expenses from the **Expenses** screen (described on the following pages) To create a new report: 1) On the home screen, tap **Expense**. On the **Expense** screen, tap **Reports.** 2) On the **Reports** screen, tap ＋ (upper-right corner).
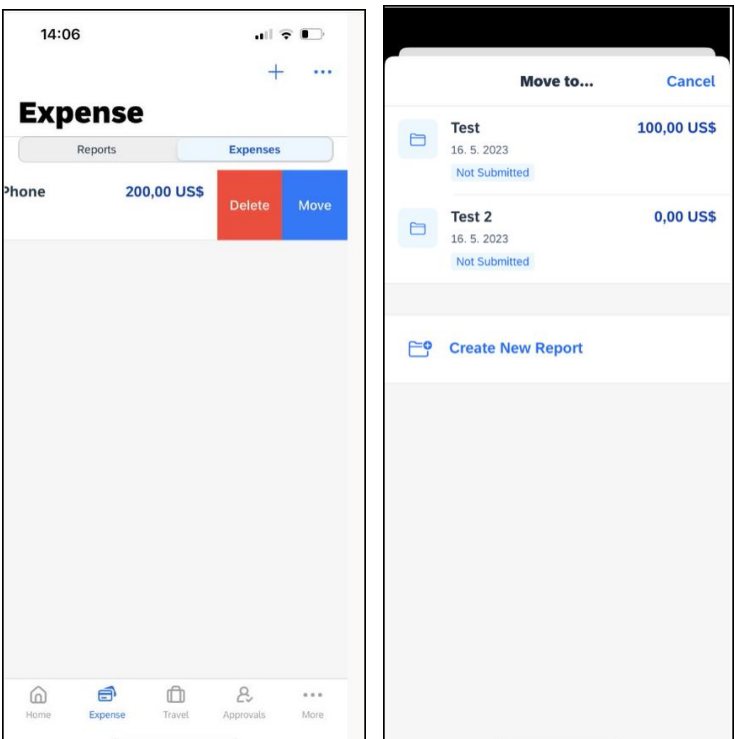
Screen(s)	Description/Action
	3) On the **New Report** screen: • SAP Concur provides a report name. Change it if desired. • Fill in the fields and make the desired selections. • Tap **Create** (upper-right corner). 4) On the **Report** screen, enter your expenses, attach receipts, etc. (described on the following pages).

Move Expenses From the Expenses Screen to an Expense Report
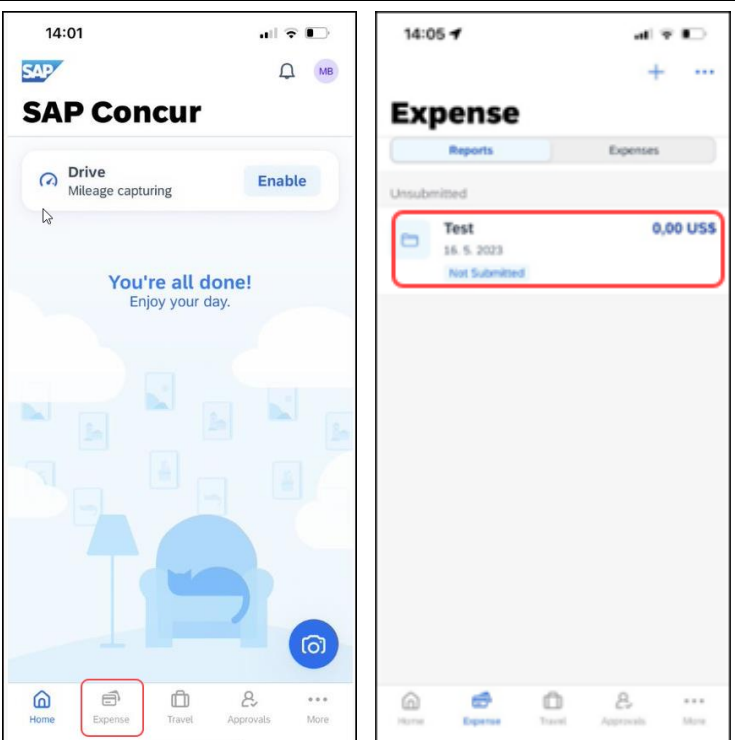
You can move one or more expenses to an existing expense report or use them to create a new expense report.
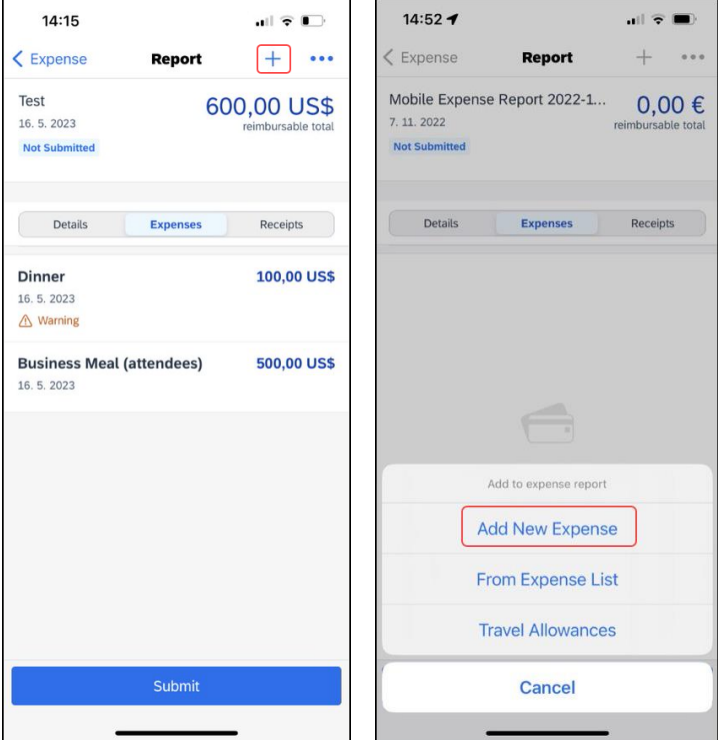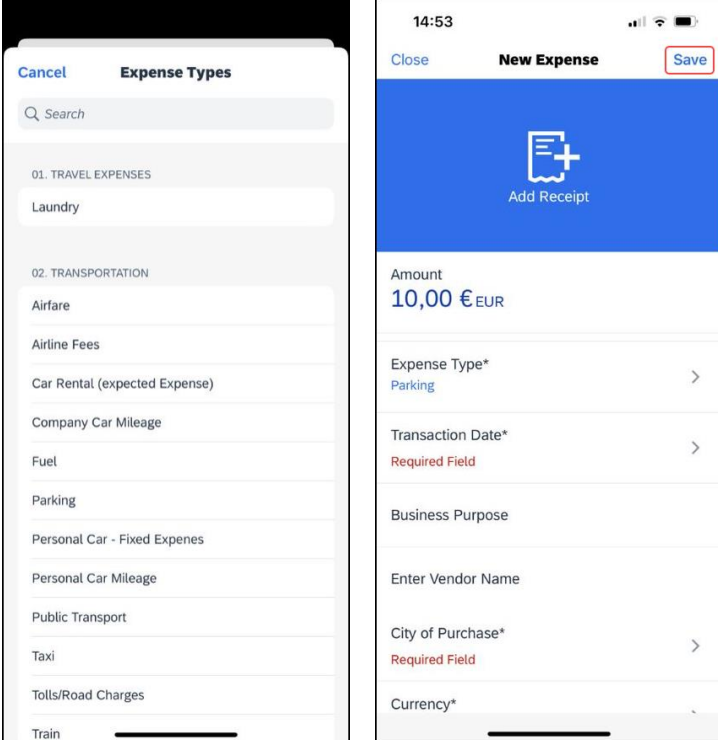
Screen(s)	Description/Action
	To move expenses from the **Expenses** screen to an expense report: 1) On the **Expense** screen tap ⋯ and choose **Select**.This will allow you to select multiple expenses to move. Then, slide to the left to display the **Delete** and **Move** options. 2) Select **Move**. 3) The **Move to...** screen will appear. 4) Select the report that you wish to move the expense to.

MOVE A SINGLE MOBILE EXPENSE, E-RECEIPT, OR CREDIT CARD CHARGE TO A NEW OR EXISTING REPORT UI

Screen(s)	Description/Action
	To move a single mobile expense, e-receipt, or credit card charge to a new or existing report:
	1) On the expense that you want to move, slide to the left to display the **Delete** and **Move** options.
	2) Select **Move**.
	3) The **Move to...** screen will appear.
	4) Select the report that you wish to move the expense to.
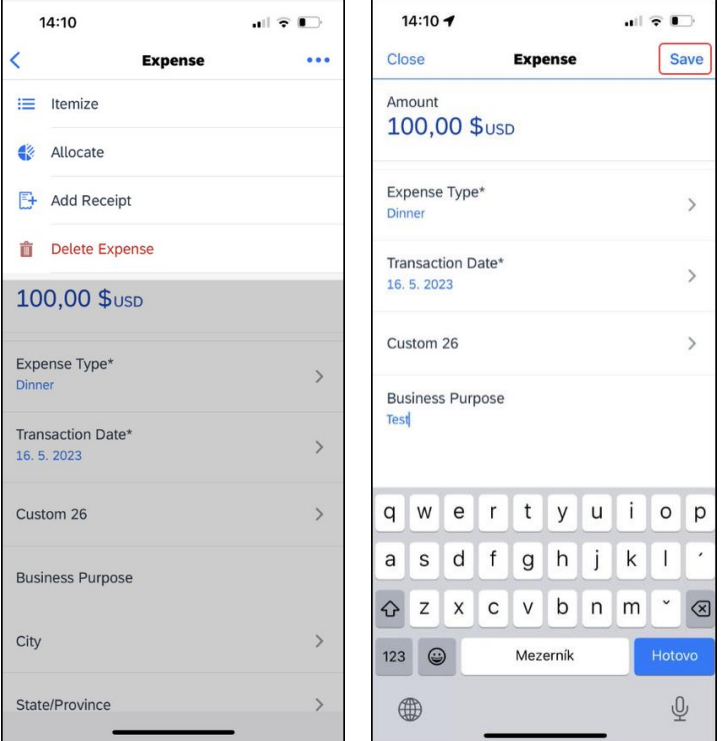
Create an Expense Within an Open Expense Report

Screen(s)	Description/Action
	To create an expense within an open expense report:
	1) On the home screen, tap **Expense Reports**.
	2) On the **Reports** screen, tap the desired report to open it.

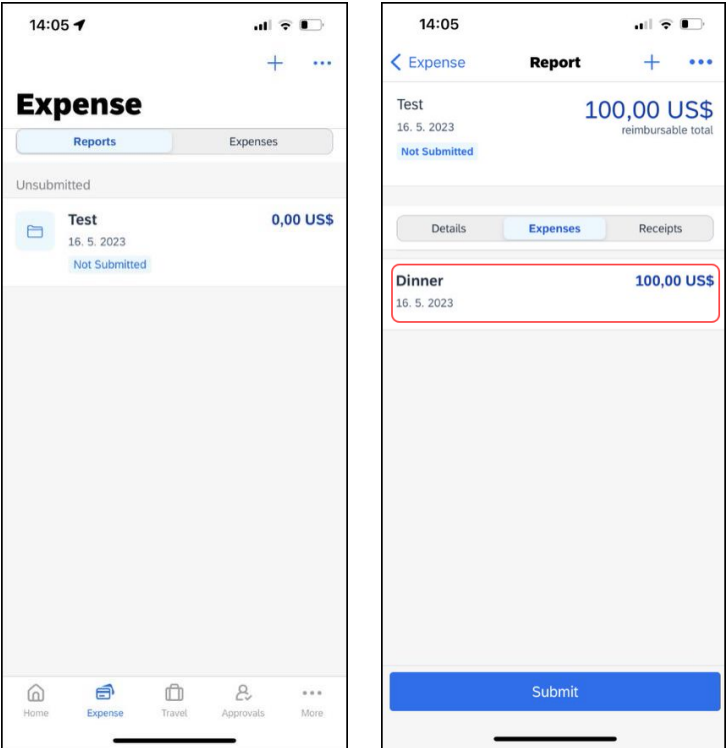| Screen(s)		Description/Action
		3) On the **Report** screen, tap ✚ (upper-right corner) to create a new expense. 4) On the **Add to expense report** menu, tap **Add New Expense**.
		5) On the **Expense Types** screen, select the desired expense type. 6) On the **New Expense** screen: • Fill in the fields and make the desired selections. • Tap **Save** (upper-right corner). **NOTE:** The new report entry experience will not appear, if: • You add the **Personal Car Mileage**, **Company Car Mileage**, or **Japan Public Transport** expense types. • You open expenses created via itineraries. • You are geographically located in China. • You are under a restrictive Mobile Device Management (MDM) or Virtual Private Network (VPN).
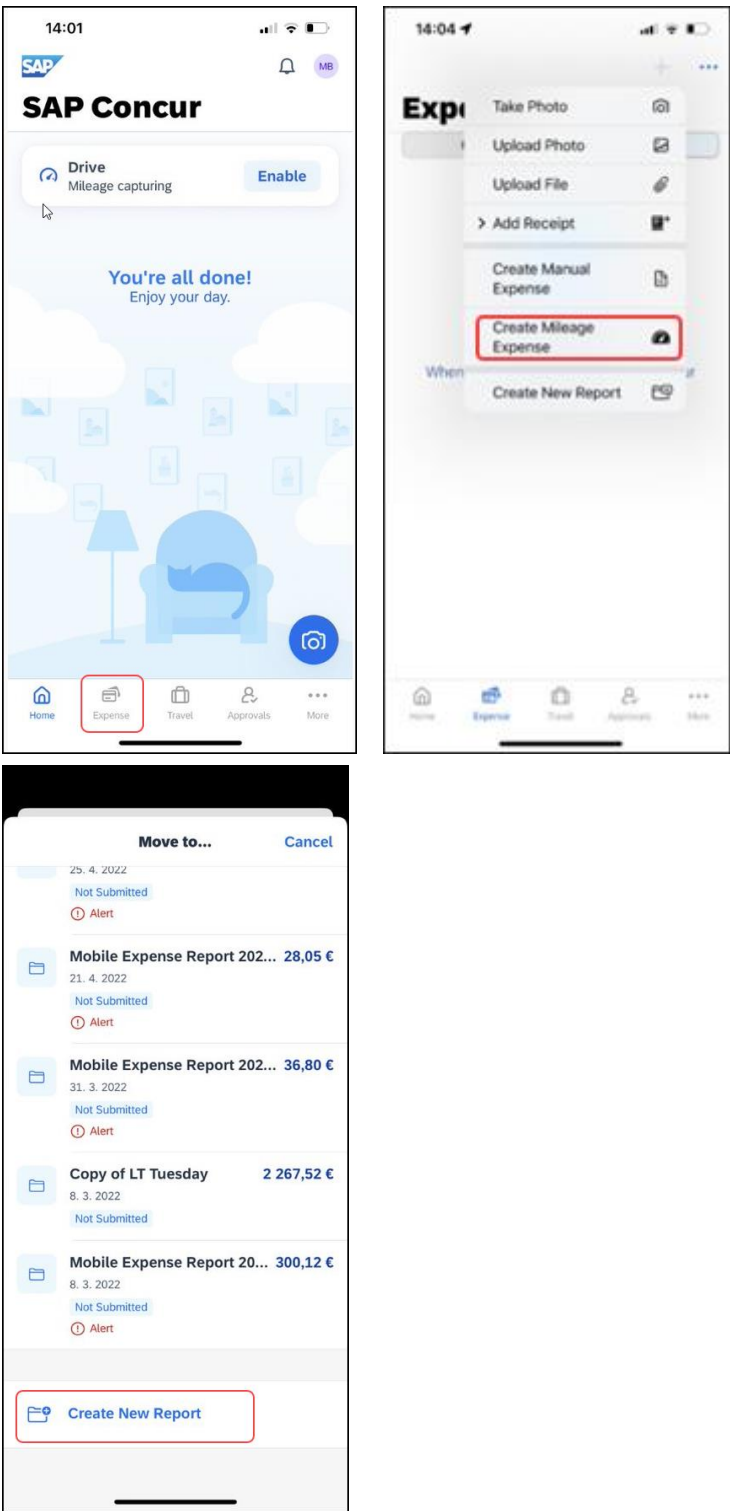
Edit an Expense on an Expense Report
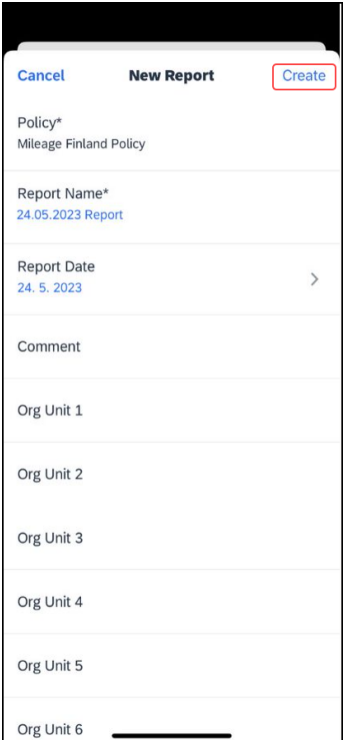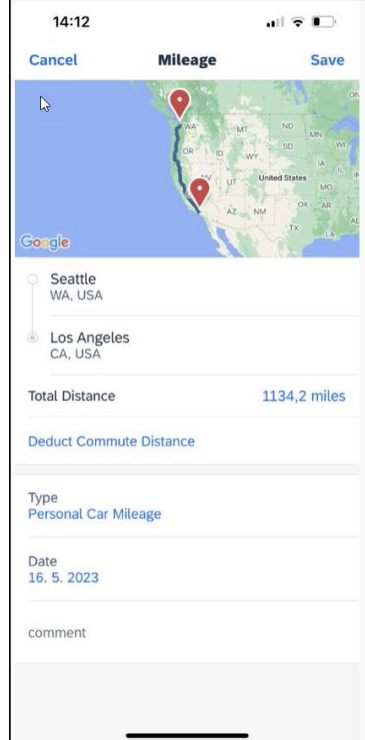
If an expense is attached to an ***unsubmitted*** expense report, you can edit almost every field.

Screen(s)		Description/Action
		1) On the **Reports** screen, tap the desired report. 2) On the **Report** screen, tap to open the desired expense.
		3) On the **Expense** screen: • Make the desired changes. • Tap ••• (upper-right corner), to view the more options menu. 4) On the menu, you can tap to view the following options: • **Itemize** • **Allocate** • **Add Receipt** 5) Tap **Save** in the upper right corner.
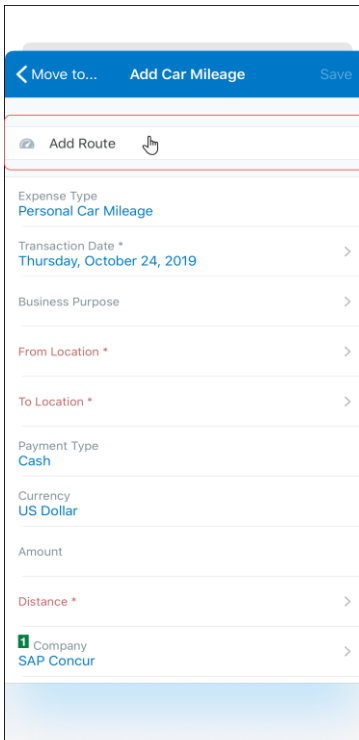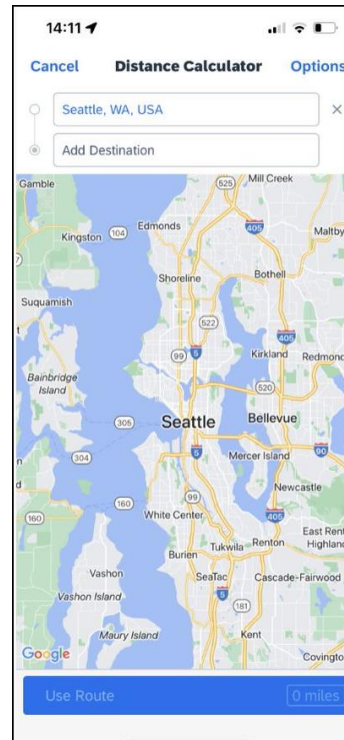
Add a Car Mileage (or Km) Expense–Manually

Screen(s)	Description/Action
	To manually add a car mileage (or Km) expense: 1) On the home screen, **Expense.** 2) Tap ⊞ and select **Create Mileage Expense**. **NOTE**: The **Create Mileage Expense** icon *only* appears if your company has the Personal Car Mileage feature activated and when you have registered a personal car on the **Profile > Profile Settings > Personal Car** page. This icon does not appear for company cars. 3) On the **Move to..** screen, either tap the desired expense report or tap **Create New Report** to create a new report.

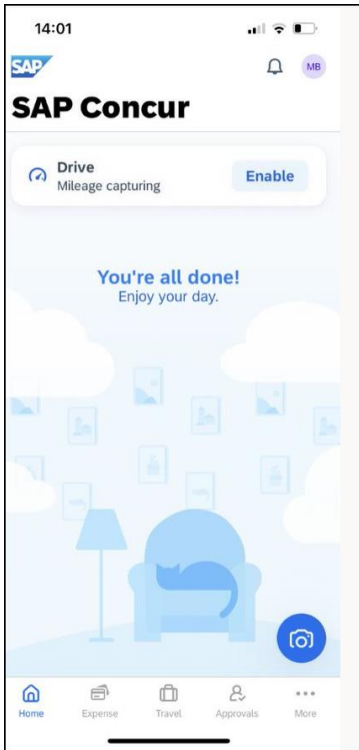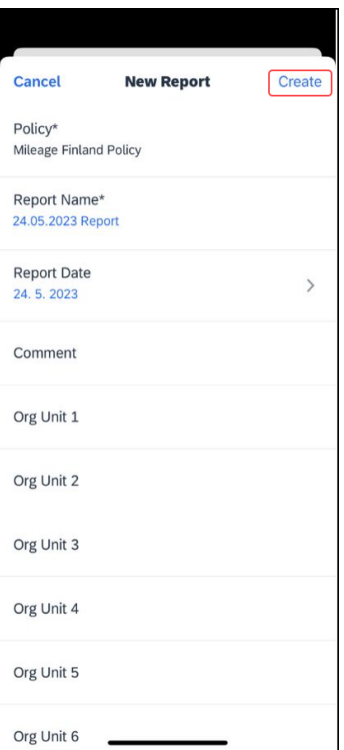| Screen(s)	Description/Action
	4) On the **New Report** screen:
	• Fill in the fields and make the desired selections.
	• Tap **Create** (upper-right corner).
	5) On the **Add Car Mileage** screen:
	• Fill in the fields and make the desired selections. **NOTE:** SAP Concur calculates the amount based on the distance and the company's mileage rate.
	• Tap **Save** (upper-right corner).

Add a Car Mileage (or Km) Expense–Mileage Calculator
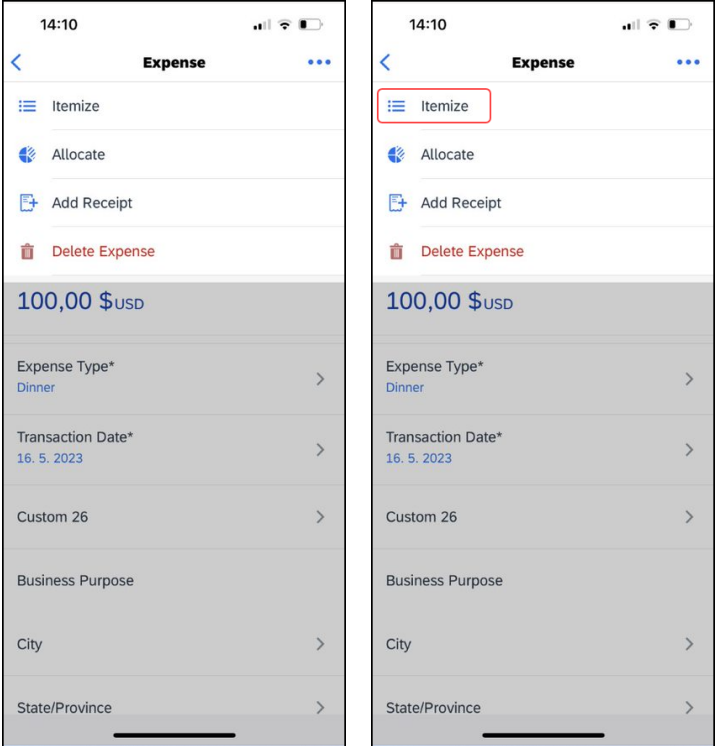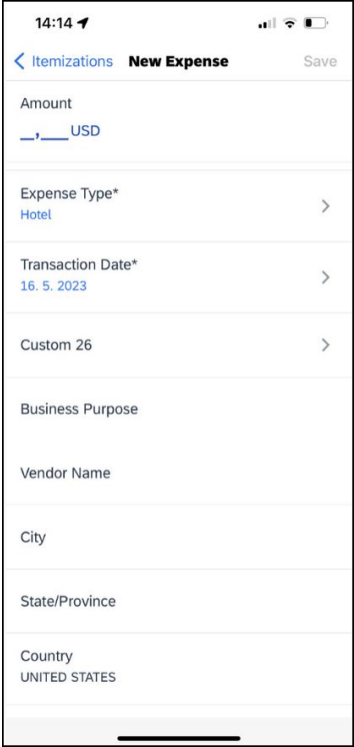
The Mileage Calculator can be used for both personal and company car mileage. The example below shows personal mileage, using the **Expense** function , accessed through the bottom of home screen. For company car mileage, the user creates an expense as usual and selects the *Company Car Mileage* (or something similar) expense type. After that, both types work the same way – as shown below.
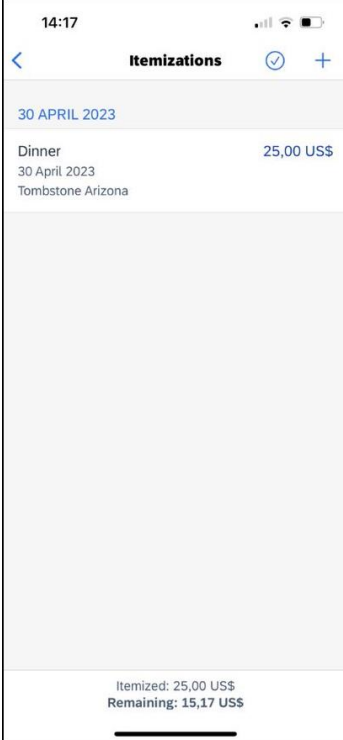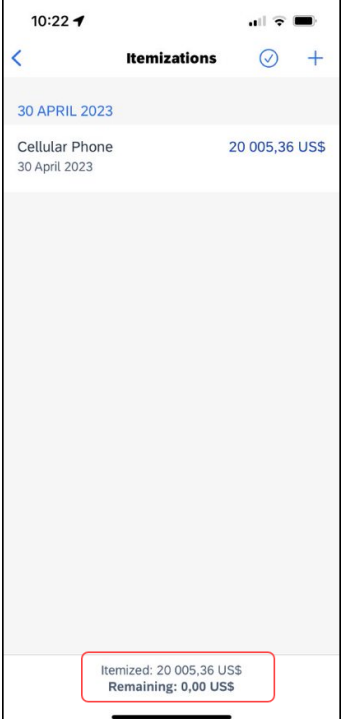
Screen(s)		Description/Action
		To add a car mileage (or Km) expense using the Mileage Calculator: 1) On the home screen, tap the **Expense** button at the bottom of the home screen. Once in the **Expense** screen, tap the plus icon and then select **Create Mileage Expense**. 2) On the **Move to...** screen, either: • Add to an existing report by selecting the report. *– or –* • Tap **Create New Report** to create a new report. Complete the steps to create the new report.
		3) On the **Add Car Mileage** screen, tap **Add Route.** **4)**On the **Distance Calculator**. On this screen, in the **Add Destination** field, start typing the initial location.

Screen(s)	Description/Action
	5) On the **Location** screen, select from the list of locations. The selected location appears on the map. 6) On the **Distance Calculator** screen, in the **Add Destination** field, start typing the ending location. 7) On the **Location** screen, select from the list of locations. The selected location appears on the map along with the mileage (lower-right corner).
	8) On the **Distance Calculator** screen, you have several additional options: • Tap **Add Destination** to add another destination. • Tap **Options** (upper-right corner) to choose to avoid tolls or highways. • If an alternate route is available (shown as a gray line), you can select that route. 9) When done, tap **Use Route**. The mileage and the reimbursement amount appear on the **Add Car Mileage** screen.
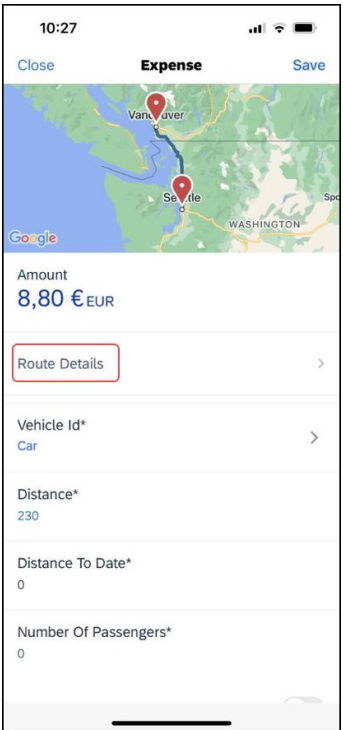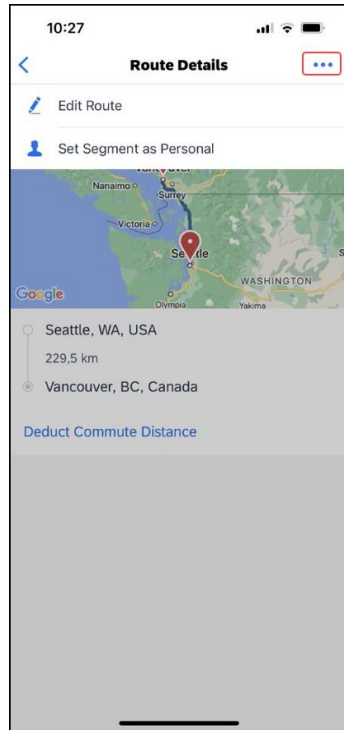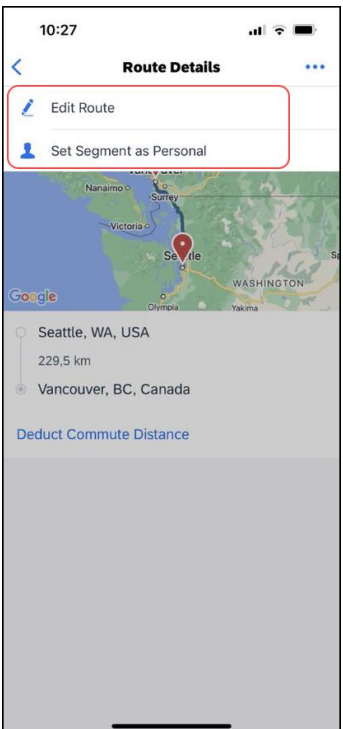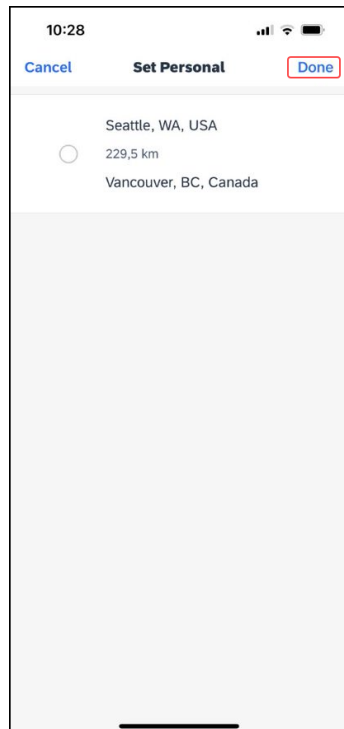
Add/Edit/Delete an Itemization
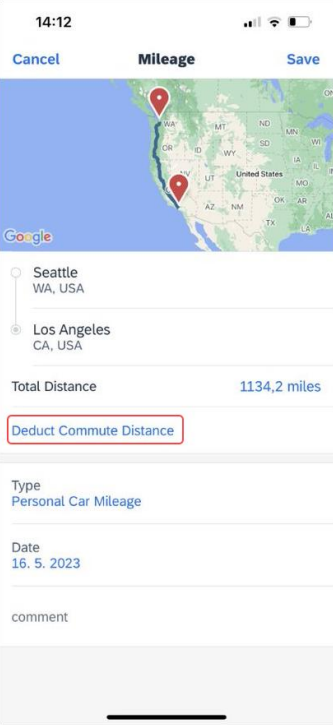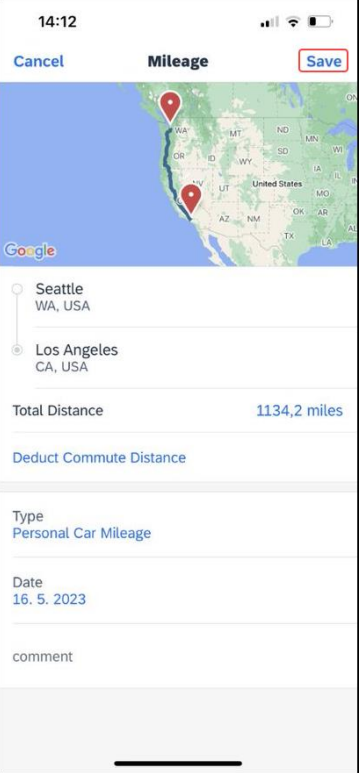
After an expense has been added to a report, you can itemize the expense.

Screen(s)	Description/Action
	To add, edit, or delete an itemization: 1) On the **Report** screen, tap to open the desired expense. 2) On the **Expense** screen, tap ••• (upper-right corner). 3) On the menu, tap **Itemize***.
	4) On the **Hotel Itemization Wizard** screen: • Enter the daily room rate and daily tax rate. • Tap **Save** (upper-right corner). The itemizations appear.

Screen(s)		Description/Action

| | | If there is a remaining balance, tap ➕ (upper-right corner) on the **Itemizations** screen and create the remaining expenses, to bring the remaining balance to zero. |

The screens show:

Left screen (14:17): Itemizations — 30 APRIL 2023 — Dinner, 30 April 2023, Tombstone Arizona — 25,00 US$. Itemized: 25,00 US$. Remaining: 15,17 US$.

Right screen (14:17): New Expense — Amount 25,00 $USD, Amount in EUR 22,48. Expense Type* Dinner. Transaction Date* 30. 4. 2023. Business Purpose. Enter Vendor Name: Tombstone Arizona. USD. Numeric keypad.

NOTE: To *edit* an itemization, tap the desired itemization and then make the desired changes.

To *delete* an itemization, swipe the desired itemization to the left.

Bottom-left screen (10:22): Itemizations — 30 APRIL 2023 — Cellular Phone, 30 April 2023 — 20 005,36 US$. Itemized: 20 005,36 US$. Remaining: 0,00 US$.

The remaining balance is brought to zero.

MAKE ADJUSTMENTS
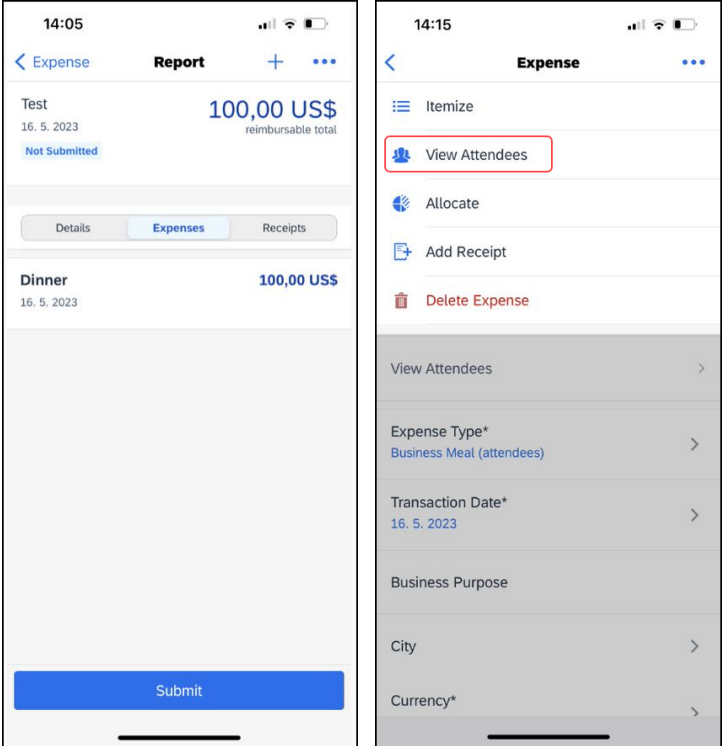
Screen(s)	Description/Action
	To make additional adjustments to your car mileage: 1) On the mileage expense screen, tap **Route Details**. 2) On the **Route Details** screen, tap ▭ (upper-right corner) to access the menu. Using the menu, you can: • Edit any portion of the trip *– or –* • Designate part of the trip as personal
	3) To edit a route: • On the menu, tap **Edit Route**. • Make the desired changes, using the same steps as when you created the route. 4) To designate part of the trip as personal: • On the menu, tap Set Segment as Personal. • On the **Set Personal** screen, select the segment that is personal. • Tap **Done**. On the **Route Details** screen, the personal distance shows at the top of the screen and the personal segment shows.
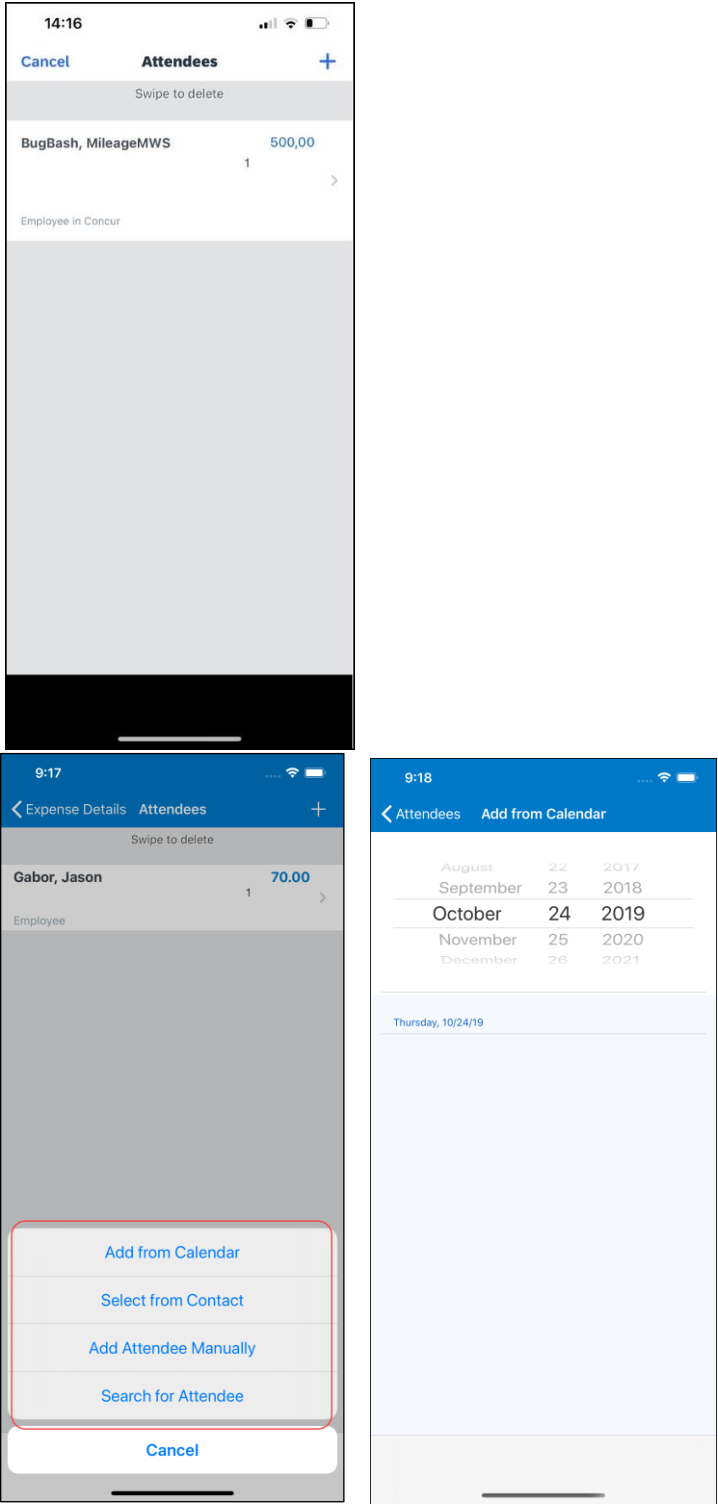
Screen(s)	Description/Action
	5) To deduct commute mileage: • On the **Route Details** screen, tap **Deduct Commute Distance**. • Define the starting and ending points using the map. • Select whether the commute is one way or round trip. • When done, tap **Use Route**. The **Route Details** screen appears.
	6) The overview of the route will appear. Tap **Save**. The expense is saved to the expense report.
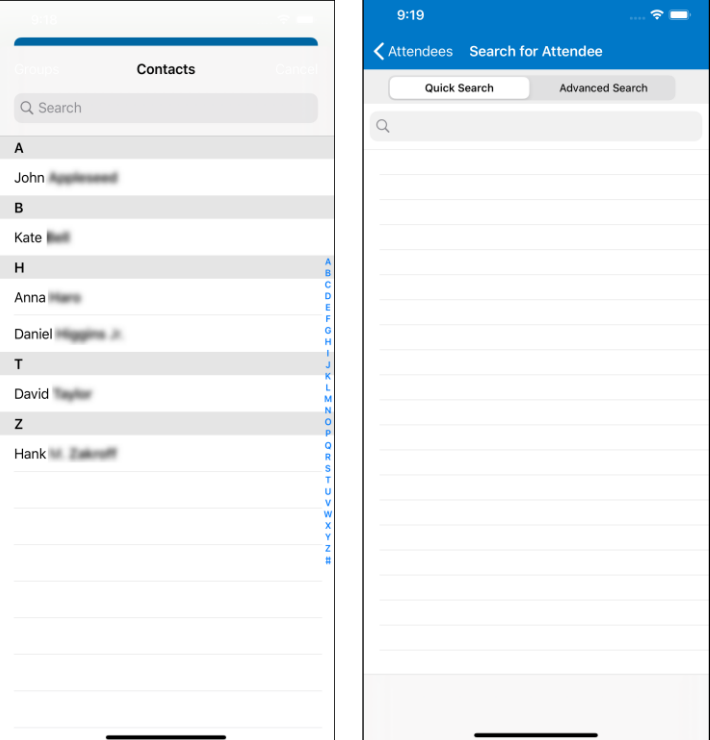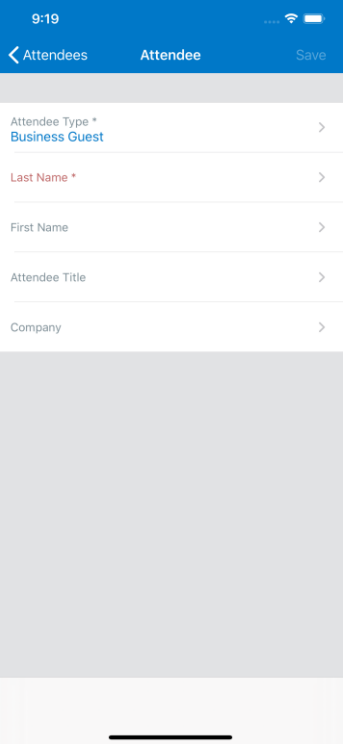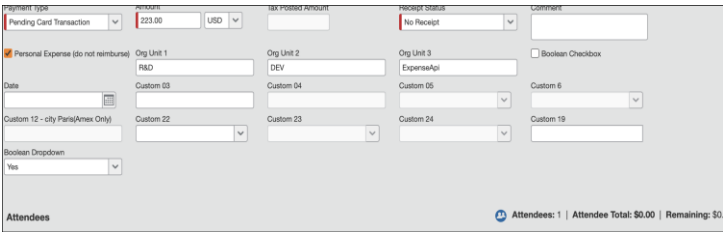
Add/Edit/Delete Attendees

After an expense has been added to a report, you can add attendees to the expense.

Screen(s)	Description/Action
	To add, edit, or delete attendees: 1) On the **Report** screen, tap to open the desired expense. 2) On the **Expense** screen, tap **View Attendees**.
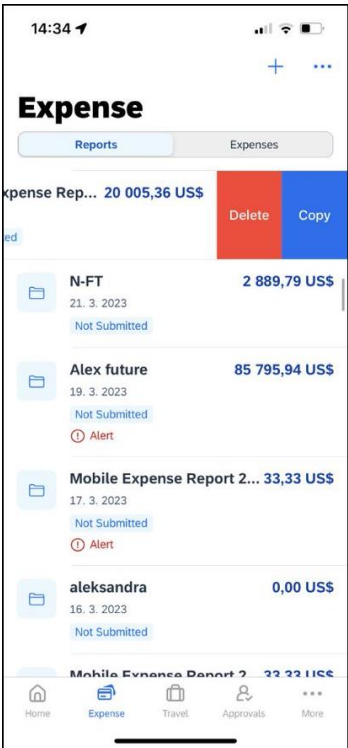
Screen(s)	Description/Action
	3) On the **Attendees** screen, tap plus sign (upper-right corner) to add an attendee. 4) On the menu, tap one of the following: • **Add from Calendar** to import attendees from your calendar

Screen(s)	Description/Action
	• **Search from Contact** to select from your smartphone contact list • **Search for Attendee > Quick Search** to search your Favorite Attendees • **Search for Attendee > Advanced Search** to search your company's list of attendees or from an external source (like Salesforce)
	• **Attendee** to manually add the attendee **NOTE:** To *edit* an attendee, tap the desired attendee name and then make the desired changes. To *delete* an attendee, swipe the desired attendee to the left and then tap **Delete**.

Screen(s)	Description/Action
	To add attendees to **personal** expenses: 1) Create expense. 2) Complete expense. 3) Add attendees. 4) Add itemization: • Set the amount of the itemization to the total amount of the expense. • Set the itemization as a personal expense. • Save the itemization. • 5) Save the expense.
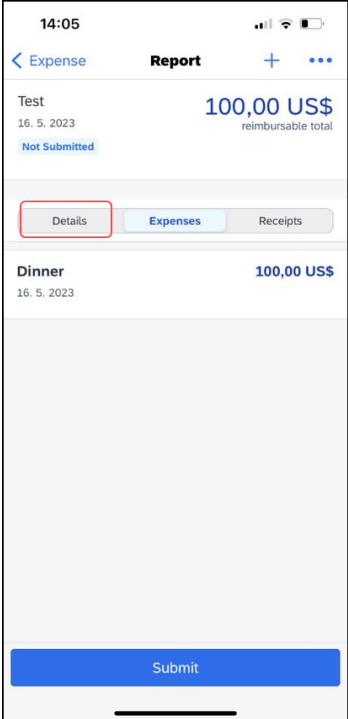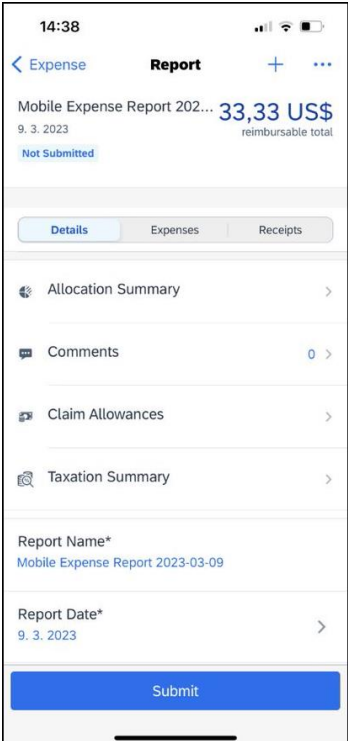
Remove an Expense From an Expense Report

You can remove an expense from an *unsubmitted* expense report.
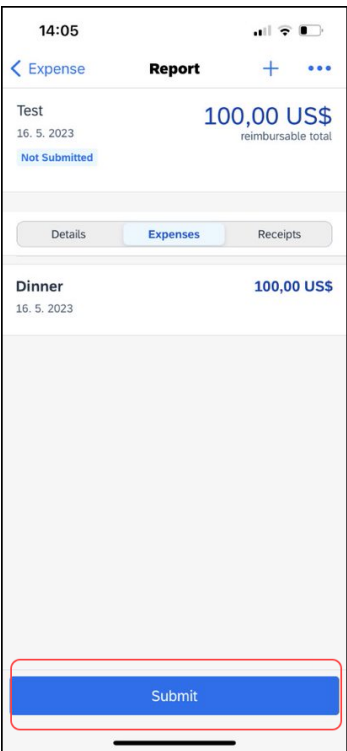
Screen(s)	Description/Action
	To remove an expense from an expense report: 1) On the expense report, swipe the desired expense to the left. The **Remove** button appears. 2) Tap **Remove**. **NOTE:** If you delete a *mobile* expense or an expense created from a card transaction, it is not really deleted; it is moved back to the "pool" of expenses on the **Expenses** screen. If you delete any other type of expense from an expense report, it is truly deleted. (This is consistent with the web version of Expense.)

Edit Report Header Information
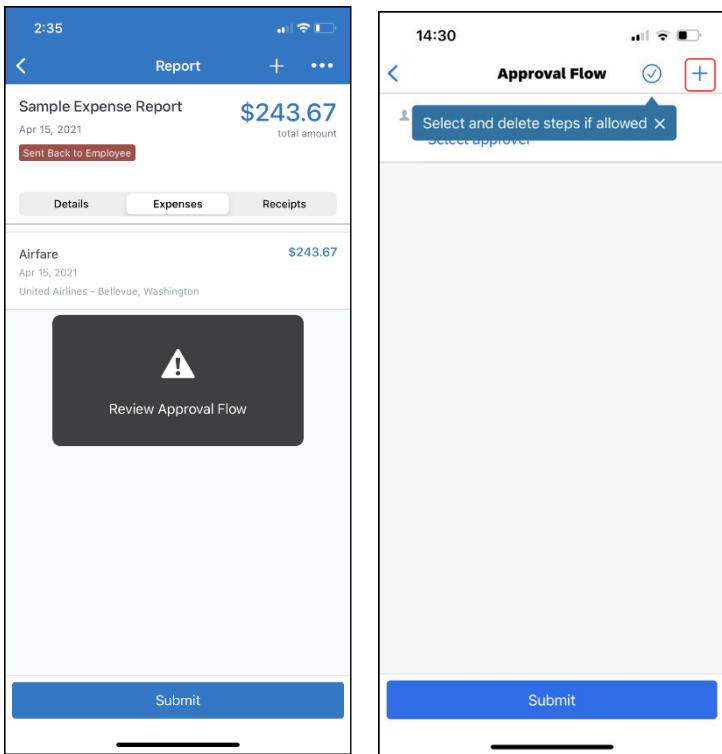
You can edit the report name, date, and other company-defined fields on an *unsubmitted* report.
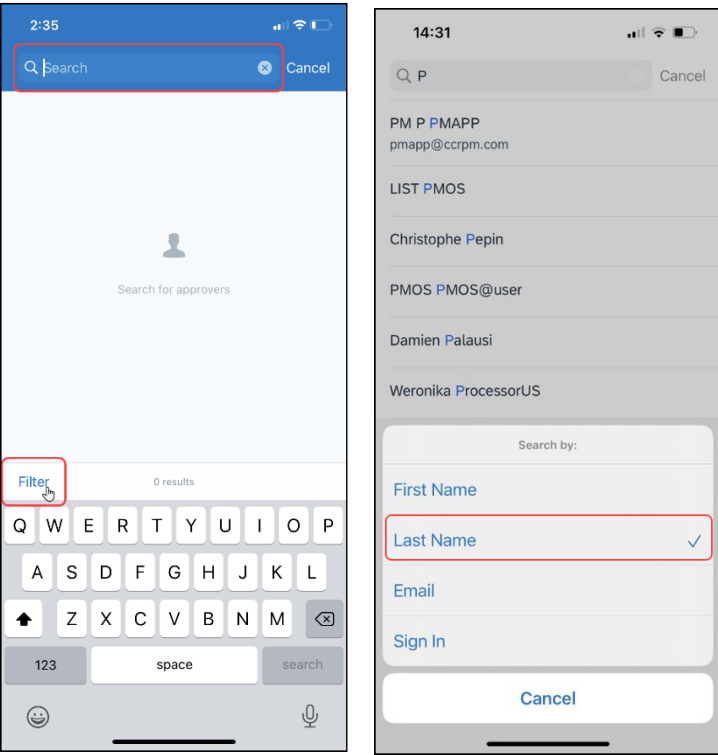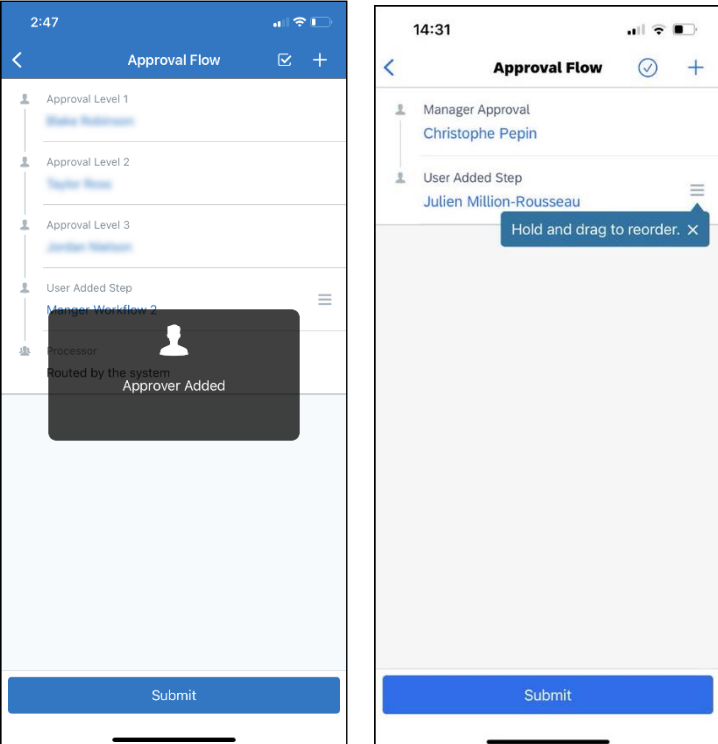
Screen(s)	Description/Action
	To edit report header information:
	1) On the **Report** screen, tap the **Details** tab.
	2) On the **Details** tab, make the desired changes.
	3) Tap **Save** (upper-right corner).
	The updated details appear on the **Report** screen.
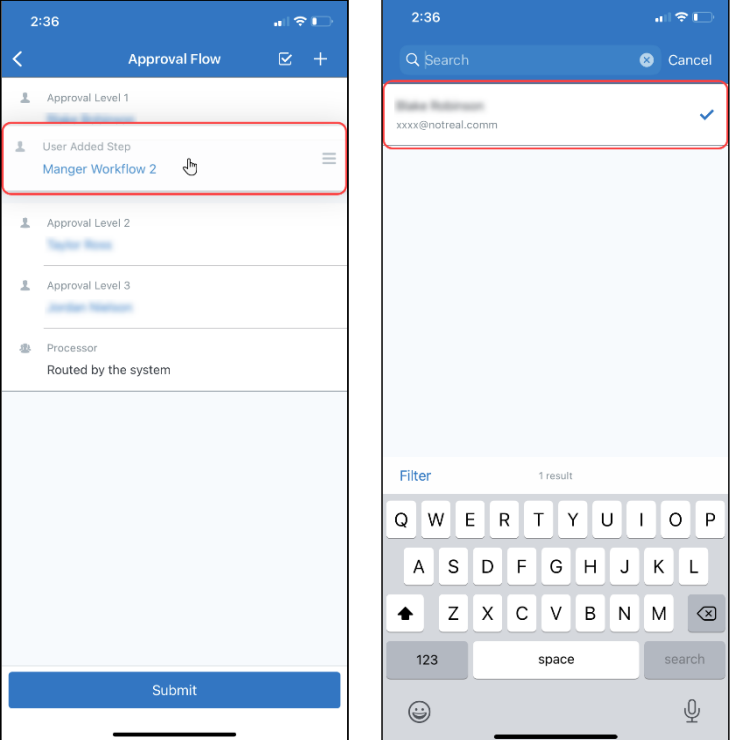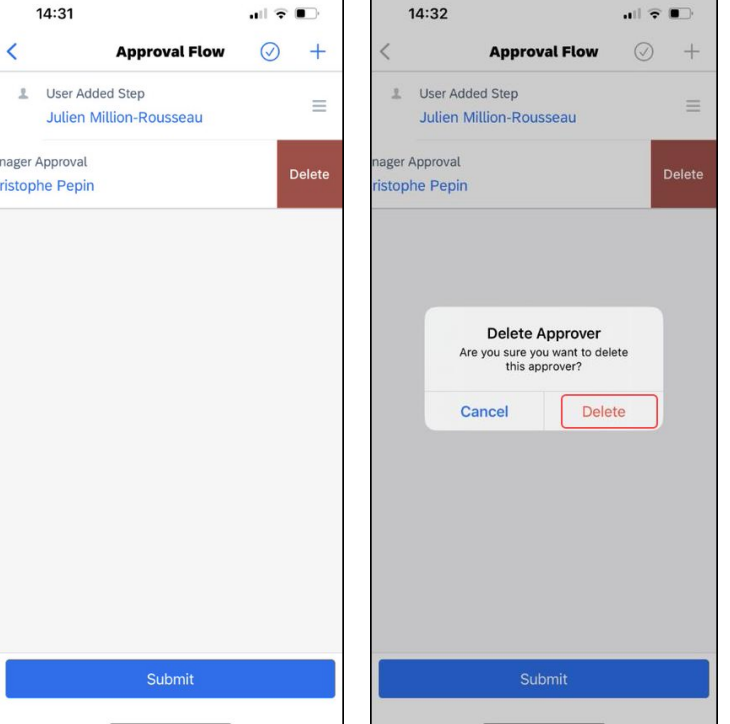
Submit an Expense Report

Screen(s)	Description/Action
	To submit an expense report, on the **Report** screen, tap **Submit** at the bottom of the screen.
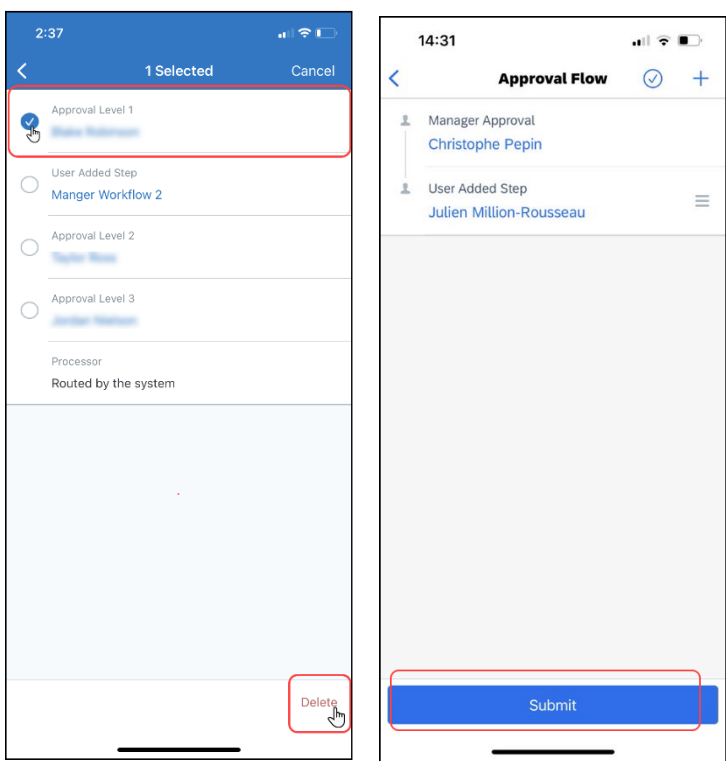
Submit an Expense Report With the Approval Flow Screen

Screen(s)	Description/Action
	To submit an expense report with the **Approval Flow** screen: 1) With the report open, tap **Submit**. The **Approval Flow** screen appears. **NOTE:** Your company will need to set the necessary configurations for the **Approval Flow** screen to appear and to allow you to modify the approval flow. 2) On the **Approval Flow** screen, tap the plus sign (upper-right corner) to add an approval step. **NOTE:** When you first access the **Approval Flow** screen, a message appears indicating that you can tap ☑ (upper-right corner) to select and delete approval steps.
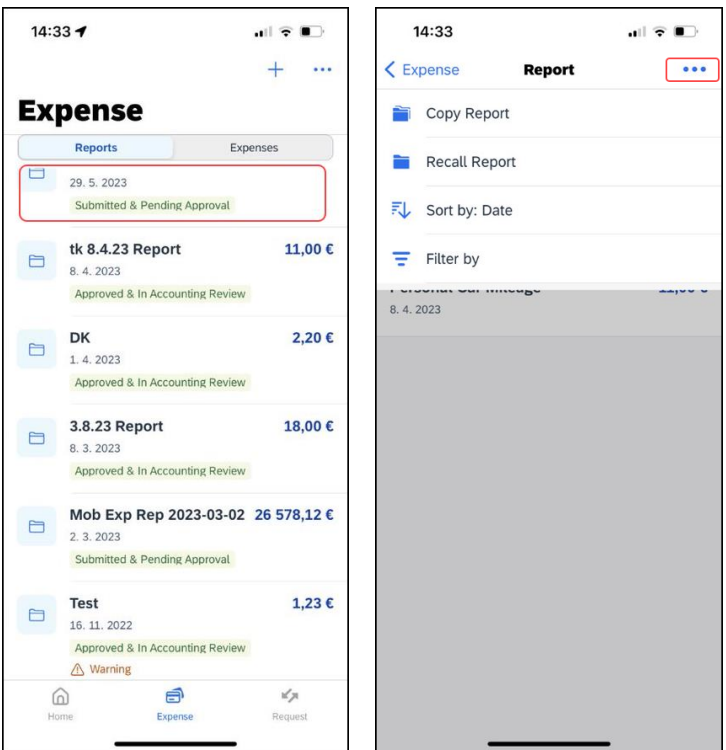
Screen(s)	Description/Action
	3) On the approvers search screen, enter search criteria in the search field. **NOTE:** While entering the search criteria, a list of approvers appears on the approvers search screen. 4) Tap the **Filter** link to change the filter. 5) On the **Search by** window, select the desired filter to search approvers by. **NOTE:** By default, the system searches for approvers via the **Last Name** filter. 6) On the approvers search screen, tap the desired approver.
	The selected approver appears as a user added step on the **Approval Flow** screen. **NOTE:** When you first add a user added step, a message will appear indicating that you can hold and drag a user added approval step to reorder it.
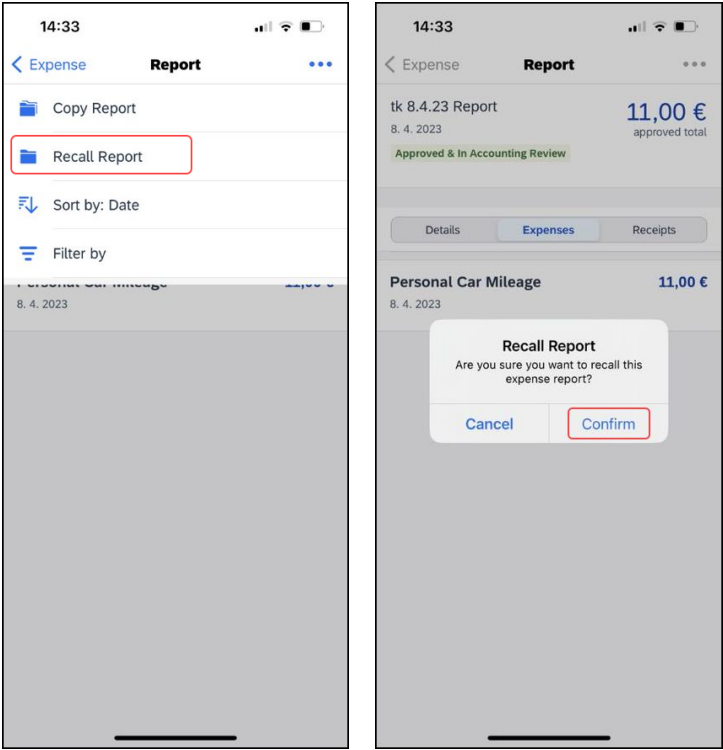
Screen(s)	Description/Action
	7) On the **Approval Flow** screen, tap and hold the desired approval step and then drag the step upward or downward to reorder it. When you tap on an existing approval step, the approvers search screen appears. The currently selected approver appears at the top of the screen with a checkmark. **NOTE:** For the **Authorized Approver** steps, all authorized approvers appear by default (without searching), and you can search within those results if desired.
	You can delete an approval step on the **Approval Flow** screen. To delete an approval step on the **Approval Flow** screen, you can either: • Swipe the desired approval step to the left and then tap **Delete** on the **Delete Approver** window to delete it. *-or-*
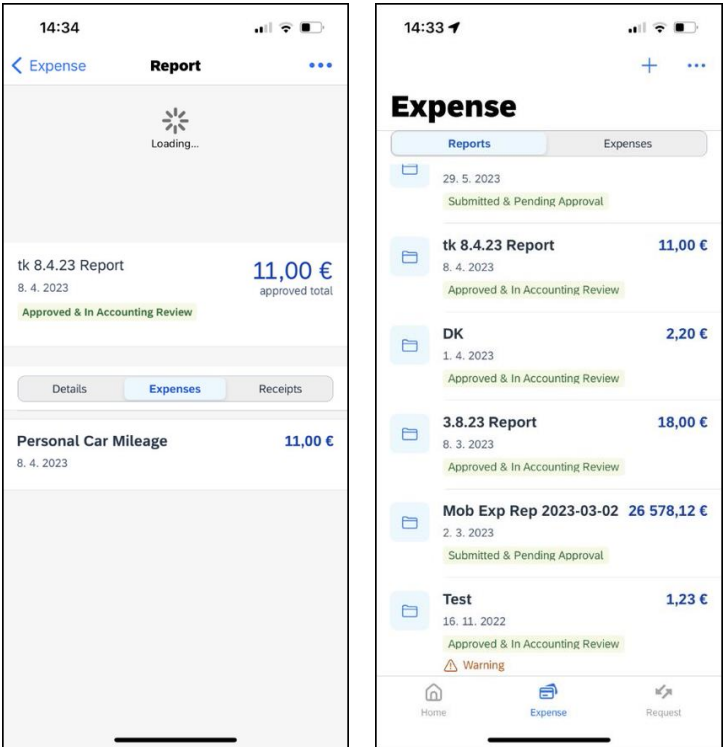
Screen(s)	Description/Action
	• Tap (upper-right corner), tap the desired approval step, then tap **Delete** (lower-left corner), and then tap **Delete** on the **Delete Approver** window that appears. 8) Once done reviewing and adjusting the approval flow on the **Approval Flow** screen, tap **Submit**.
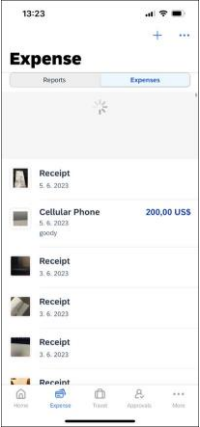
Recall an Expense Report

Screen(s)	Description/Action
	To recall a report: 1) On the home screen, tap **Expense Reports**. 2) On the **Reports** screen, from the **Active** tab, tap the desired submitted report. 3) On the **Report** screen, tap (upper-right corner).
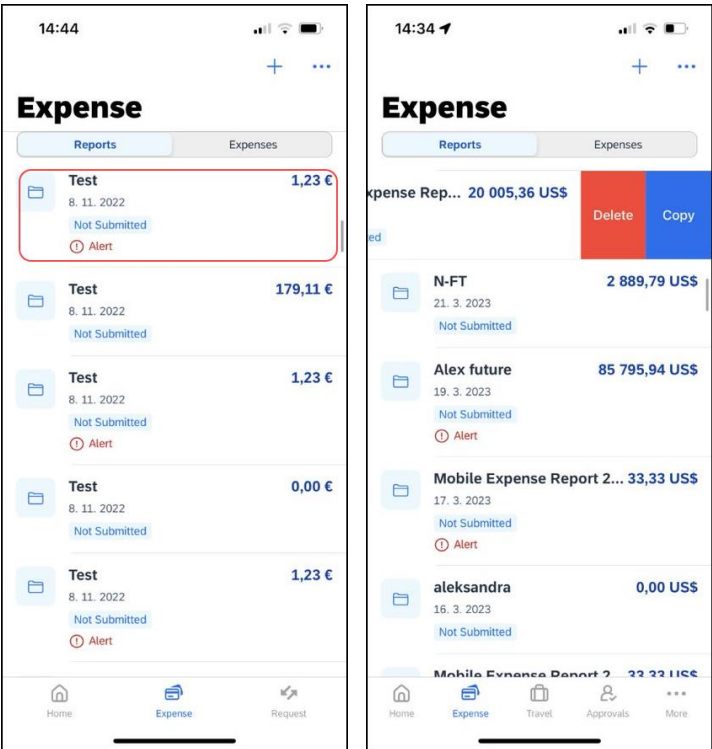
Screen(s)	Description/Action
	4) On the menu, tap **Recall Report**. 5) On the **Recall Report** window, tap **Confirm**. 6) The report has been sent back to the employee.

Refresh Data

Screen(s)	Description/Action
	To refresh report data – for example, expenses and reports – pull down from the top.

Screen(s)	Description/Action
	To refresh expense data – for example, expenses and reports – pull down from the top. Once the refresh icon is cleated, the **Expense** screen will be refreshed.

Delete an Unsubmitted Expense Report
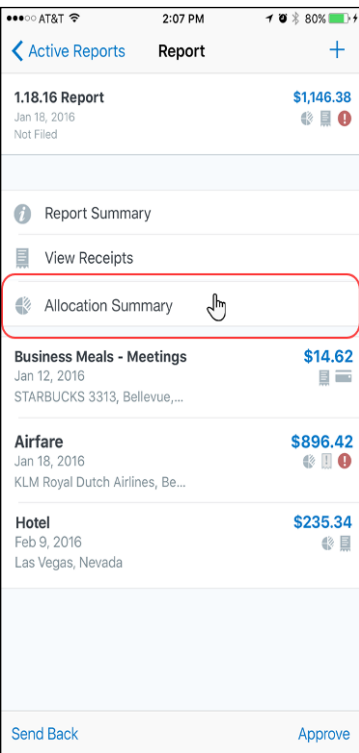
Screen(s)	Description/Action
	To delete an unsubmitted expense report: 1) On the **Reports** screen, tap the **Active** tab and then swipe the desired report to the left. The **Delete** button appears. 2) Tap **Delete**. **NOTE:** Expenses on the report that are related to card transactions are not really deleted – they are returned to the "pool" of card transactions. Cash transactions are truly deleted.

View/Add/Edit/Delete Allocations
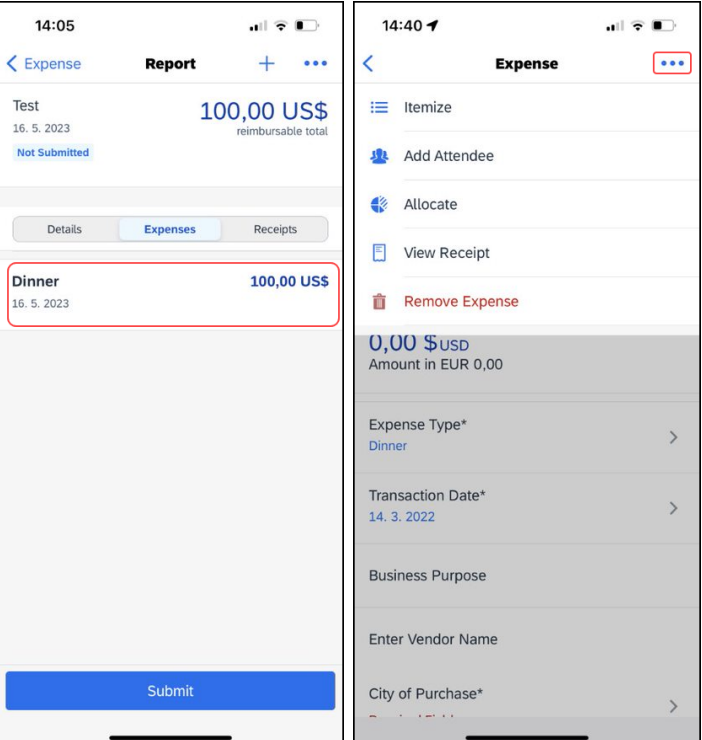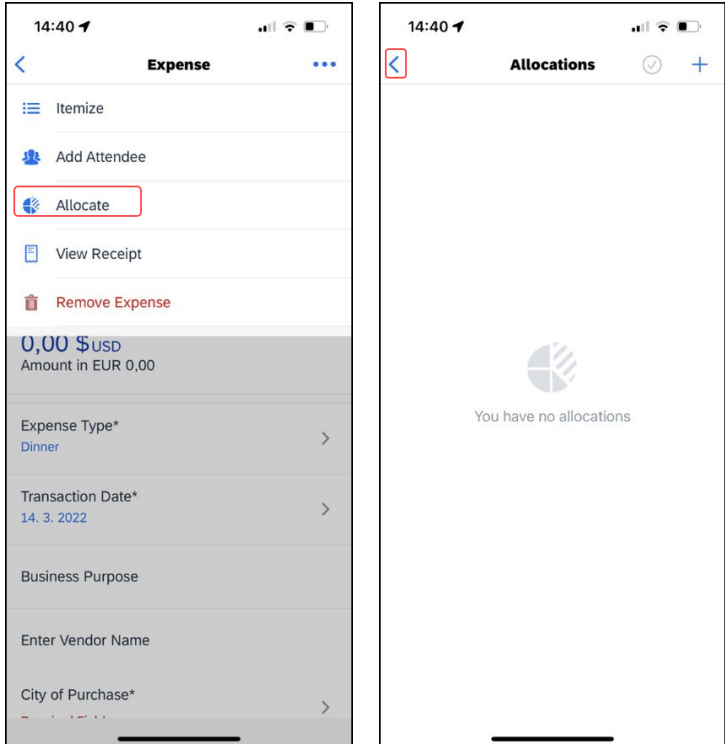
You can view report-level allocations, expense-level allocations, and itemization-level allocations.

VIEW REPORT-LEVEL ALLOCATIONS
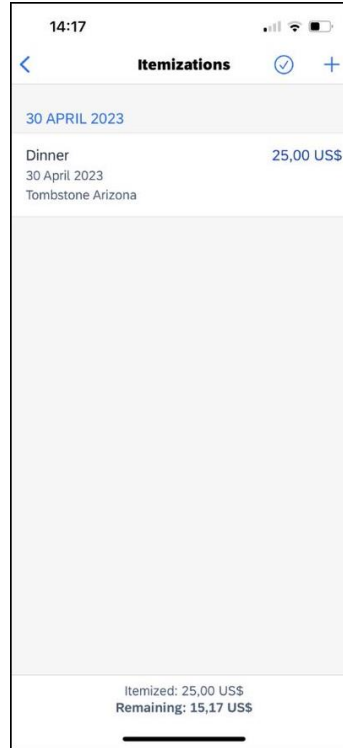
The **Allocation Summary** screen shows that the expenses are allocated to two cost centers (R&D and Marketing at 50% each). Each equals $565.88 with a total of $1,131.76. ($1,131.76 = the airfare and hotel expense on the report.)

Screen(s)	Description/Action
	To view report-level allocations: 1) On the **Report** screen, tap **Allocation Summary**. 2) On the **Allocation Summary** screen: • Review the information. • Tap **Report** (upper-left corner) to return to the report.

VIEW EXPENSE-LEVEL ALLOCATIONS WITH FIORI UI
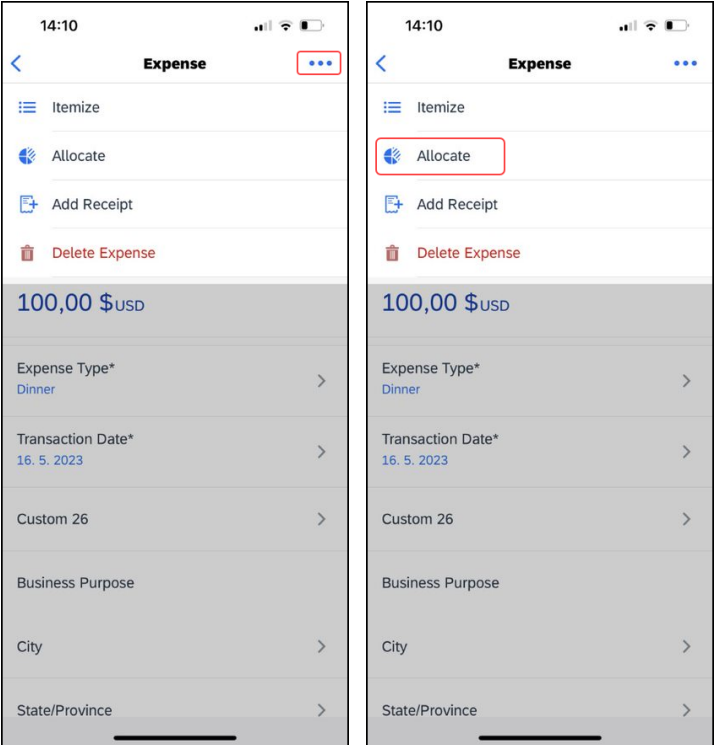
Screen(s)	Description/Action
	To view expense-level allocations: 1) On the **Report** screen, tap the desired expense. 2) On the **Expense** screen, tap ••• (upper-right corner).
	3) On the menu, tap **Allocate**. 4) On the **Allocations** screen: • Tap ∨ on the desired allocation to view more details. • Tap ‹ (upper-left corner) to return to the **Report** screen.
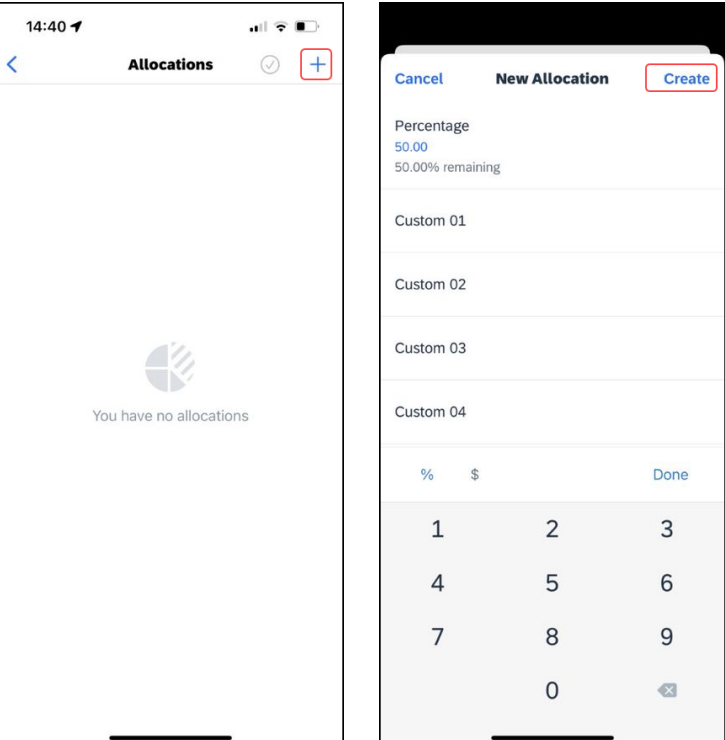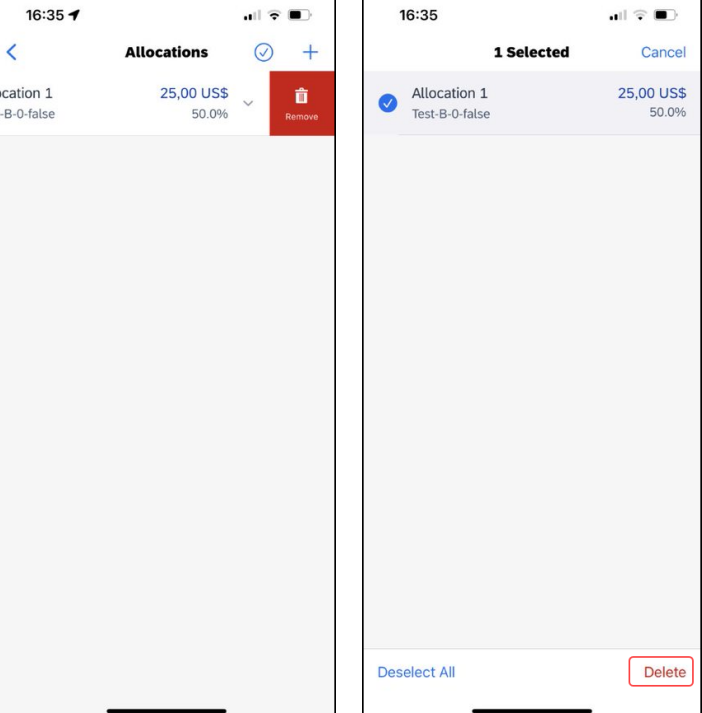
VIEW ITEMIZATION-LEVEL ALLOCATIONS WITH FIORI UI

Screen(s)	Description/Action
	To view itemization-level allocations: 1) On the **Report** screen, tap the desired expense. 2) On the **Expense** screen, tap **View Itemizations***.
	3) On the **Itemizations** screen, tap the desired itemization. 4) On the **Expense** screen, tap **View Allocations**.

Screen(s)	Description/Action
	5) On the **Allocations** screen: • Tap ⌄ on the desired allocation to view more details. • Tap ‹ (upper-left corner) to return to the **Report** screen.
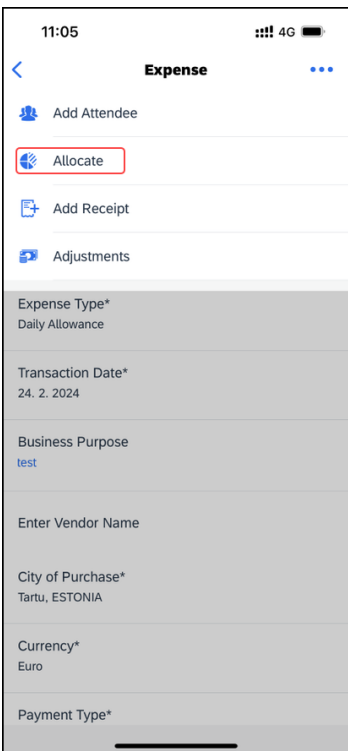
ADD/EDIT/DELETE ALLOCATIONS WITH FIORI UI

Screen(s)	Description/Action
	To add, edit, or delete allocations: 1) To *add* allocations, on the **Expense** screen: • Tap ••• (upper-right corner). • On the menu, tap **Allocate**.
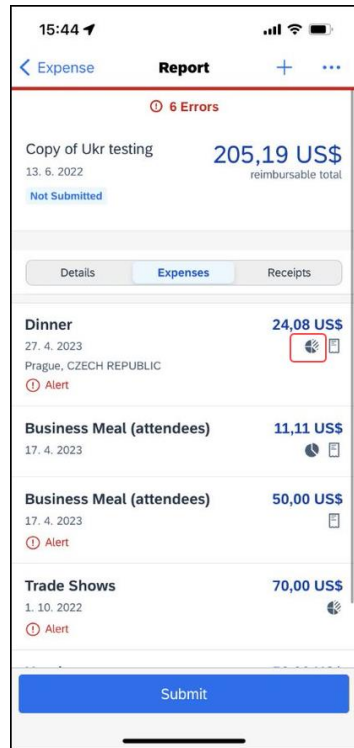
Screen(s)		Description/Action

		• On the **Allocations** screen, tap the plus icon (upper-right corner) to add additional allocations.
		 • On the **New Allocation** screen, you can:
		    ♦ Fill in the fields (if any) and make the desired selections.
		    ♦ Tap **Create** (upper-right corner).
		 2) To *edit* an allocation, on the **Allocations** screen:
		 • Tap the desired allocation to open it.
		 • Make the desired changes.

		3) To *delete* an allocation, on the **Allocations** screen: • Swipe the desired allocation to the left and then tap **Remove**. • Tap ☑ (upper-right corner) on the selection screen. • Tap the desired selection circles. • Tap **Delete** (lower-right corner) to delete the selected allocations from an expense. 4) At the bottom of the **Allocations** screen, review the **Allocated** and **Remaining** percentages.
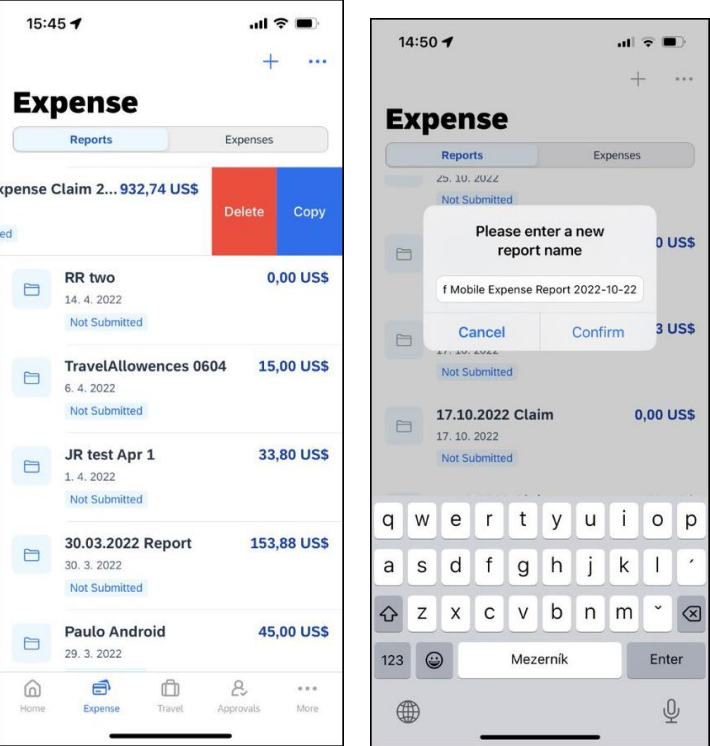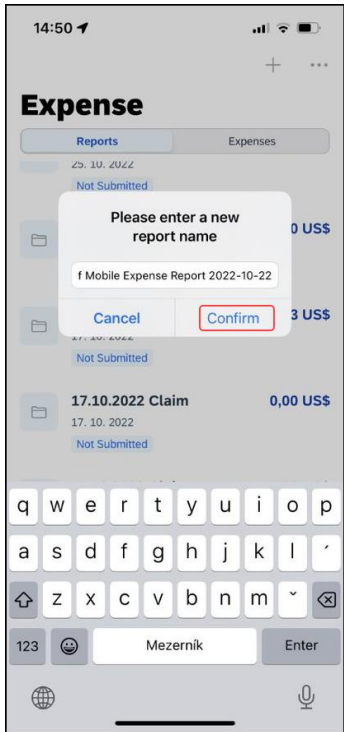
CREATE ITEMIZATION-LEVEL ALLOCATIONS WITH FIORI UI

Screen(s)	Description/Action
	To create itemization-level allocations: 1) On the **Expense** screen, tap **Allocate** 2) On the **Allocations** screen: • Tap the plus icon in the upper-right corner. • Fill in the fields (if any) and make the desired selections. • Tap the plus icon in the upper-right corner to add additional allocations.
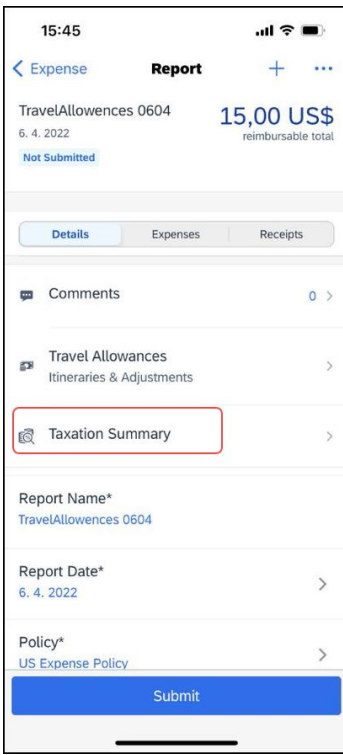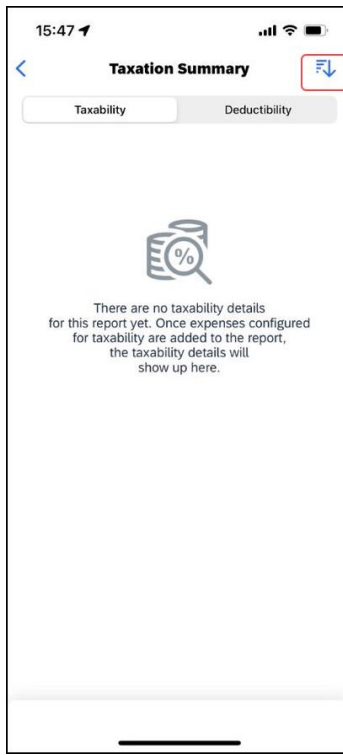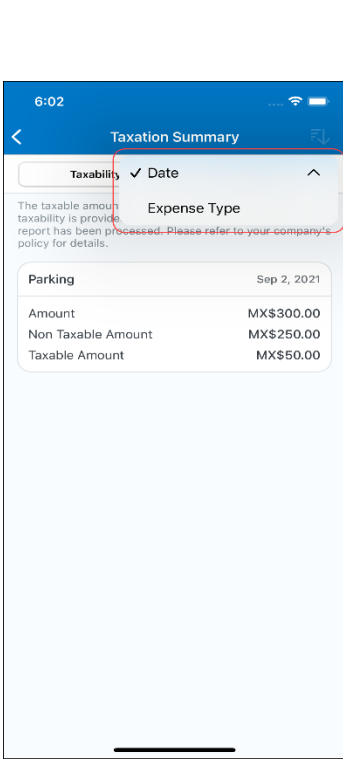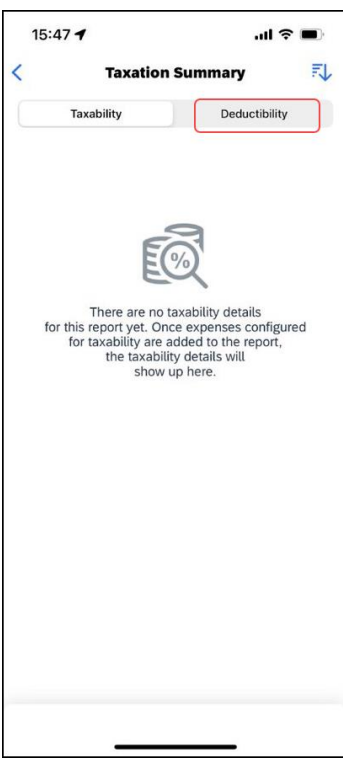
ICON

Screen(s)	Description/Action
	Once items are allocated, an Allocation icon appears next to the expense and at the report level.

Copy a Report From Existing Report=

Screen(s)	Description/Action
	To copy a report from an existing report:
	1) On the **Reports** screen, swipe the desired report to the left. The **Copy** option appears.
	2) Tap **Copy**. A box appears (with the existing report name), requesting a new report name.
	3) Enter the new name and tap **Confirm**. The copied report appears.
	4) Make the desired changes, attach receipt images, etc.
	5) Save or submit as usual.
	The copied report appears on the **Reports** screen.

Access the Taxation Summary Screen – iPhone

Screen(s)	Description/Action
	To access the **Taxation Summary** screen: 1) From the **Report** screen, on the **Details** tab, tap **Taxation Summary**. 2) On the **Taxation Summary** screen, tap (upper-right corner) to view the sort options.
	The sort by window appears with the following options: • **Date** • **Expense Type** 3) On the **Taxation Summary** screen, tap the **Deductibility** tab.

The **Deductibility Amounts** window appears with the total taxability amounts.

4) From the **Taxation Summary** screen, on the **Deductibility** tab, tap ⓘ (lower-left corner) to view the taxability amounts.

The **Taxability Amounts** window appears.
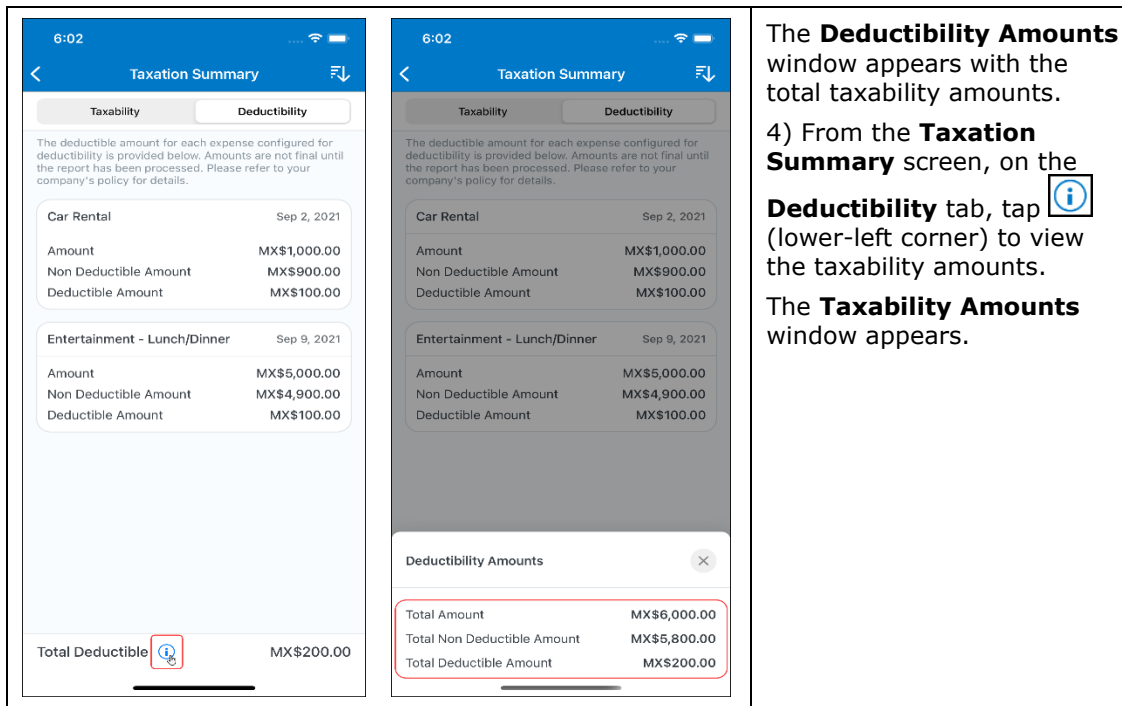
Work With Fixed Travel Allowances

Users can claim their **fixed** meals and **fixed** lodging travel allowances in the SAP Concur mobile app.

FIXED VS REIMBURSABLE TRAVEL ALLOWANCES

Fixed travel allowances – often referred to as *per diems* – provide a defined daily amount regardless of the actual amount spent by the user.

- **Reimbursable** travel allowances generally provide reimbursement for the actual amount of the expense. The ability to create and manage reimbursable travel allowances is not yet available in the mobile app.

RESTRICTIONS
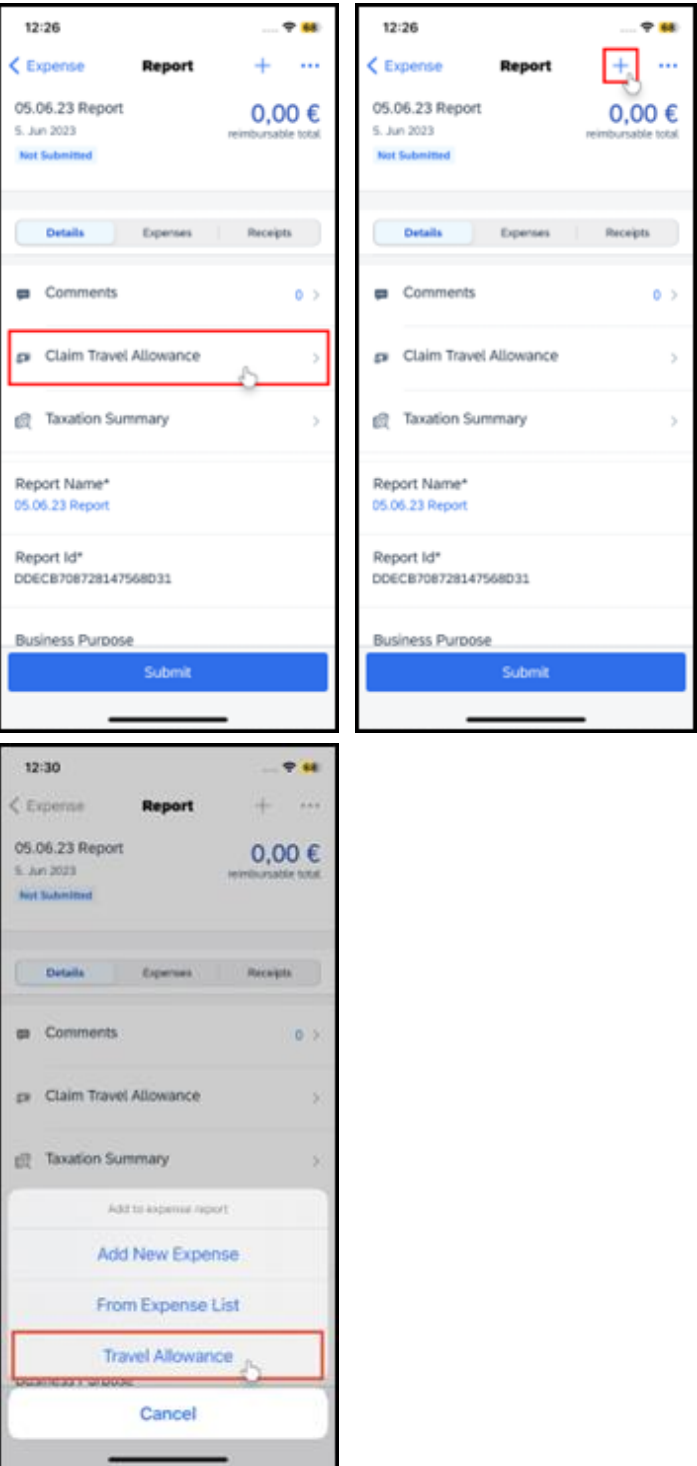
For the most part, fixed travel allowances work the same way in the mobile app as on the web version of SAP Concur – with some exceptions. These configuration options are not available in the SAP Concur mobile app:
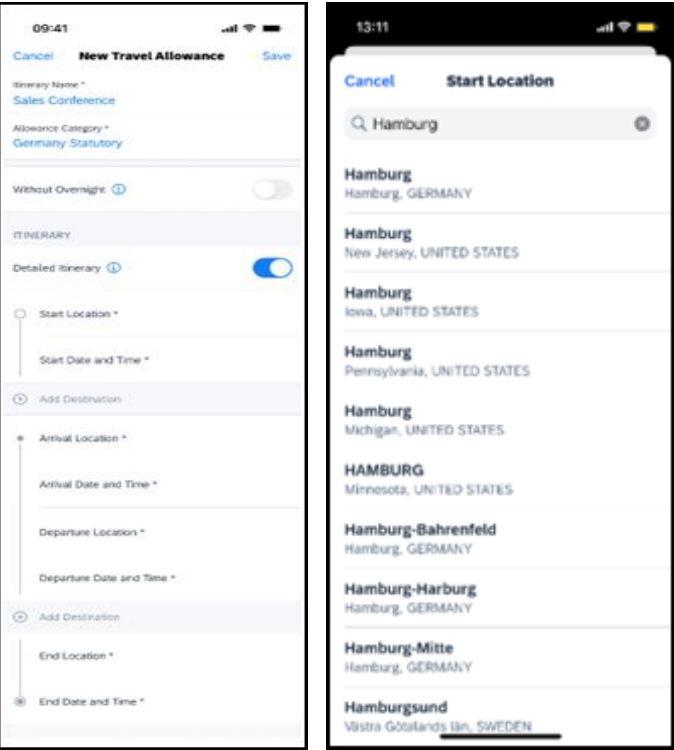
- Users cannot define/select:
  - Trip length
  - "Short distance"
  - "Extended trips"
  - "Use Percent Rule"
  - Location "within municipality"

- Users cannot enter:
  - Actual meal amounts
  - Rate location
- The mobile version of SAP Concur does not combine meals and lodging rates nor does it display base rates, company rates, government rates, etc.
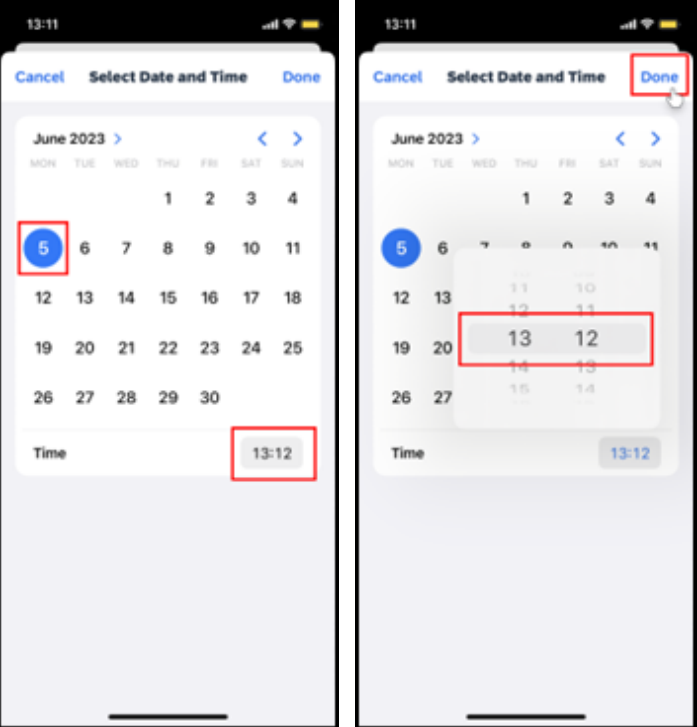
If the user's configuration uses any of the options listed above, the user should manage their travel allowances using the web version of SAP Concur.
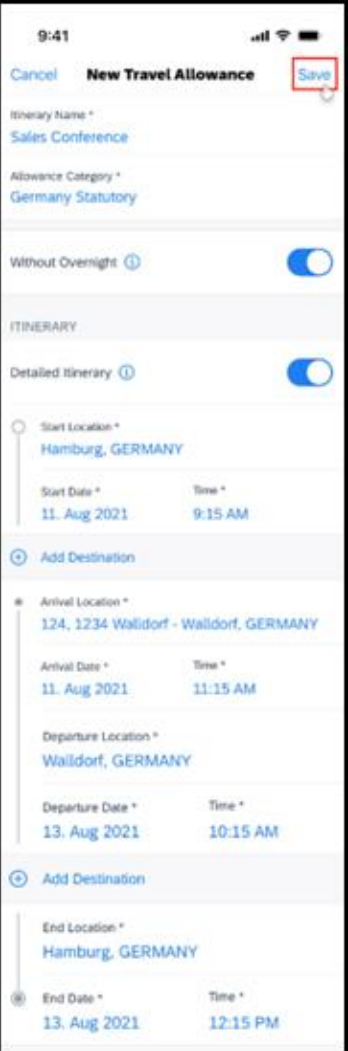
CREATE FIXED ALLOWANCES

CREATE A NEW FIXED TRAVEL ALLOWANCE IN AN EXPENSE REPORT

Screen(s)	Description/Action
	To create a new fixed travel allowance in an expense report: 1) With a report open, on the **Details** tab, tap **Claim Travel Allowance** (or tap the plus icon and select **Travel Allowance**).

Screen(s)	Description/Action
	2) On the **New Travel Allowance** screen:
	• Enter the itinerary name.
	• Select the **Allowance Category**.
	NOTE: If you select an allowance category - which supports the border crossing feature - an additional input field will appear in trip segments, where a border crossing situation is detected.
	• Select the **Trip Type**.
	• Swipe **Without Overnight** to the right, if there was no overnight stay during the trip.
	• Swipe **Detailed Itinerary** to the right, to view all itinerary fields. (In this example, the **Detailed Itinerary** option is enabled.)
	NOTE: Depending on which allowance category you select, you may have the option to choose between the simple or detailed itinerary mode.
	If you enable the **Detailed Itinerary** toggle while in simple mode your detailed changes will be lost. The system will then replace your information with defaulted values.
	If you switch - from the simple mode - back to the detailed mode, you will need to re-enter your details in the additional fields again.
	• On the **Location** screen, enter and tap on the desired start and arrival locations.
	NOTE: When you select an allowance category with the *German 3-month-rule* configuration, the **Arrival Location** field will require the full address to be filled out. Without this configuration enabled, you only need to fill out the destination city field and the full address is not required.
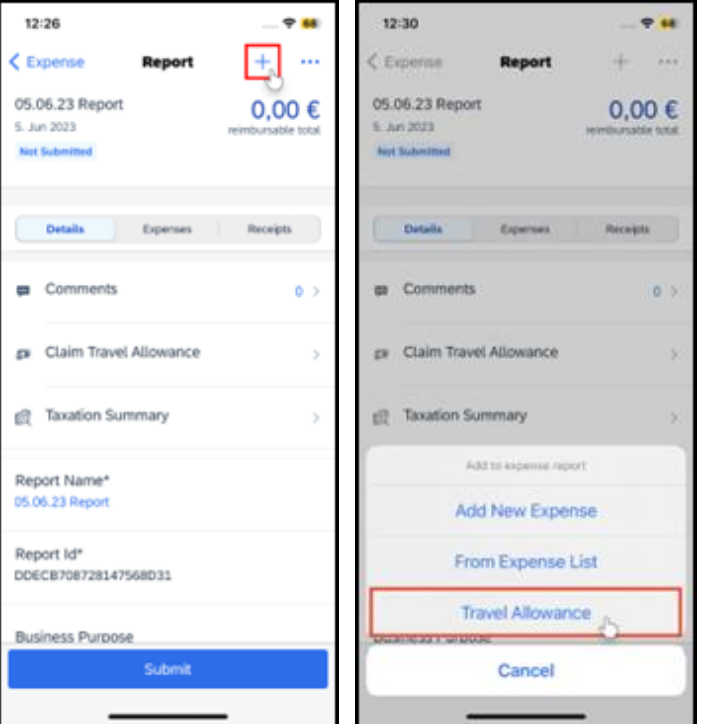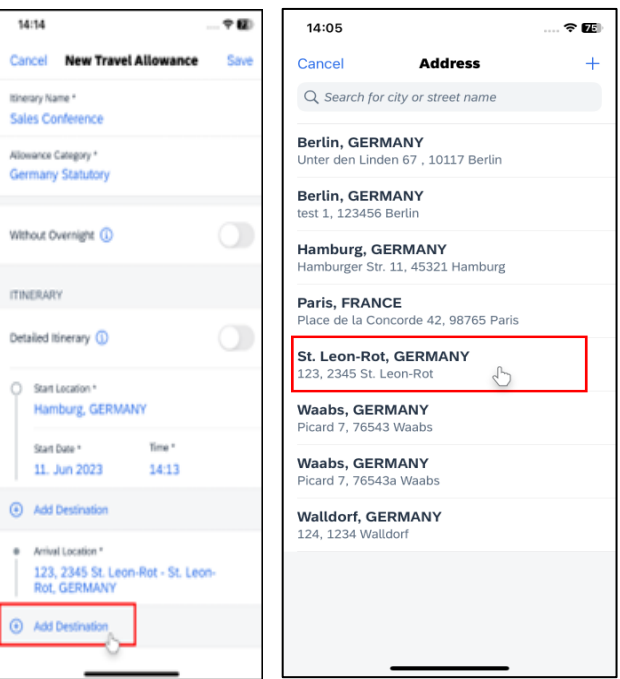
Screen(s)	Description/Action
	- On the **Select Date and Time** screen, tap the desired date. - On the time window, select the desired time and then tap **Done**.
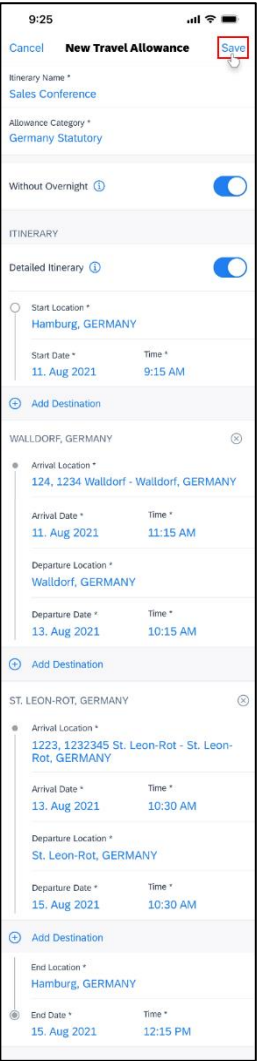
Screen(s)	Description/Action
	• Enter the return trip information.
	NOTE: The **Add Destination** option is only for trips with more than one destination.
	• Repeat for each leg of the trip, entering the exact "arrival" address if necessary.
	• Review the itinerary for accuracy.
	4) When done, tap **Save** (upper-right corner).
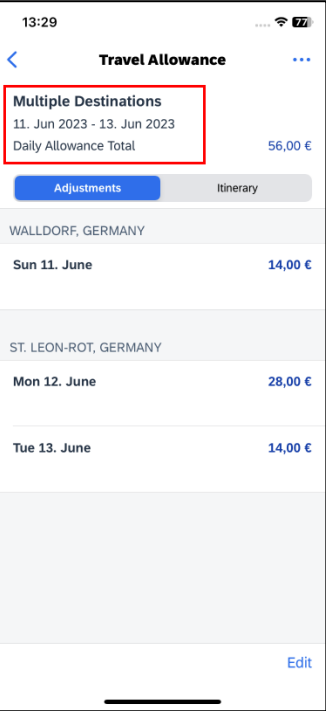
Screen(s)	Description/Action
	5) On the **Adjustments** tab on the **Travel Allowance** screen, tap the desired daily allowance that requires adjustment. 7) On the **Daily Allowance** screen: • Make the desired adjustments. **NOTE:** If the web version of SAP Concur provides a list of options instead of Yes/No, then the list appears here as well. • When done, tap **Save** (upper-right corner).
	8) On the **Travel Allowance** screen: • Make any other required adjustments. • Tap (upper-left corner) to return to the **Report** screen. 9) On the **Report** screen: • Review for accuracy. • From the **Details** tab, tap **Travel Allowance Itineraries & Adjustments** if changes are necessary. • Finish adding expenses, receipts, etc. Submit when ready.
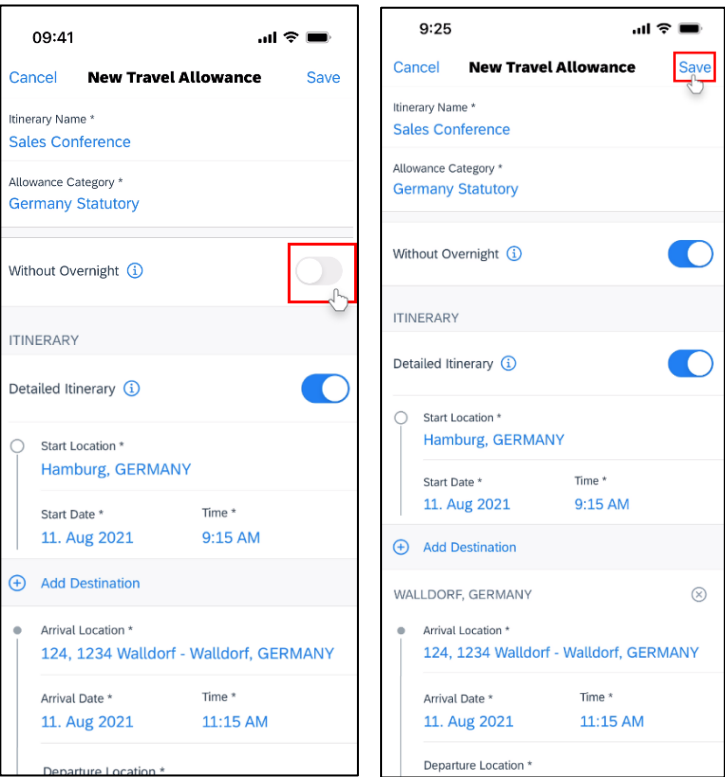
25 CREATE A NEW FIXED TRAVEL ALLOWANCE WITH MULTIPLE DESTINATIONS IN AN EXPENSE REPORT

CREATE A NEW FIXED TRAVEL ALLOWANCE WITH MULTIPLE DESTINATIONS IN AN EXPENSE REPORT
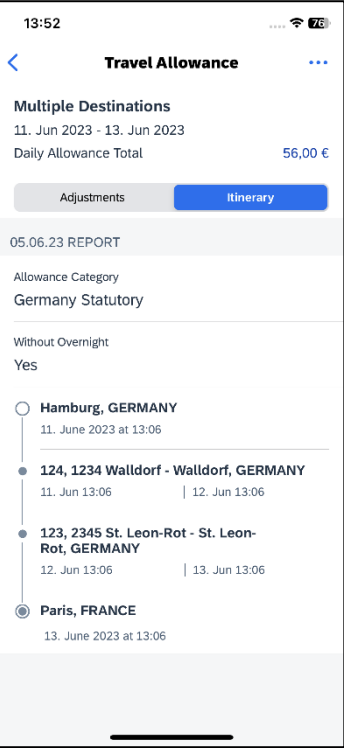
Screen(s)	Description/Action
	To create a new fixed travel allowance with multiple destinations in an expense report: 1) With a report open, on the **Details** tab, tap **Claim Travel Allowance** (or **Travel Allowance Itineraries & Adjustments**). 2) On the **Travel Allowance** screen, tap the plus icon (upper-right corner).
	3) Fill in the fields and make the desired selections. • Select an **Arrival Location** or **Address** (depending on the allowance category). • Fill in **Start Date** and **Time** for all destinations • Tap **Add Destination** to create multiple destinations.

Screen(s)	Description/Action
	4)When done, tap Save (upper-right corner).
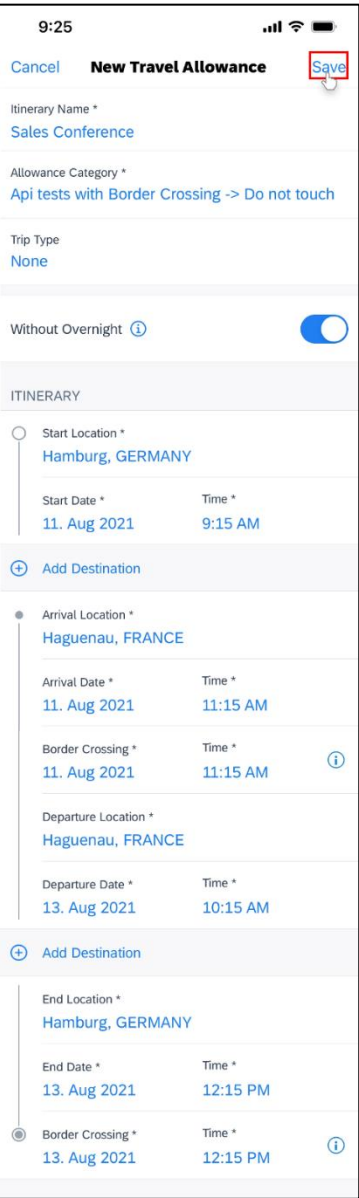
Screen(s)	Description/Action
	The multiple destinations appear on the **Travel Allowances** screen. **NOTE:** If your company has opted out of the multiple itineraries on one expense report feature, the option to add more itineraries will not appear.

CREATE A NEW FIXED TRAVEL ALLOWANCE ITINERARY WITHOUT OVERNIGHT IN AN EXPENSE REPORT

Screen(s)	Description/Action
	To create a new fixed travel allowance itinerary without overnight in an expense report: 1) On home screen, tap **Expense Reports**. 2) On the **Reports** screen, tap the desired expense report. 3) On the **Report** screen, tap the **Details** tab. 4) On the **Details** tab, tap **Claim Travel Allowance** (or **Travel Allowance Itineraries & Adjustments**). 5) On the **New Travel Allowance** screen: • Fill in the fields and make the desired selections. • Swipe the **Without Overnight** toggle to right. • Tap **Save** (upper-right corner). **NOTE:** Depending on which category is in the **Allowance Category** field, the user can adjust the itinerary details.
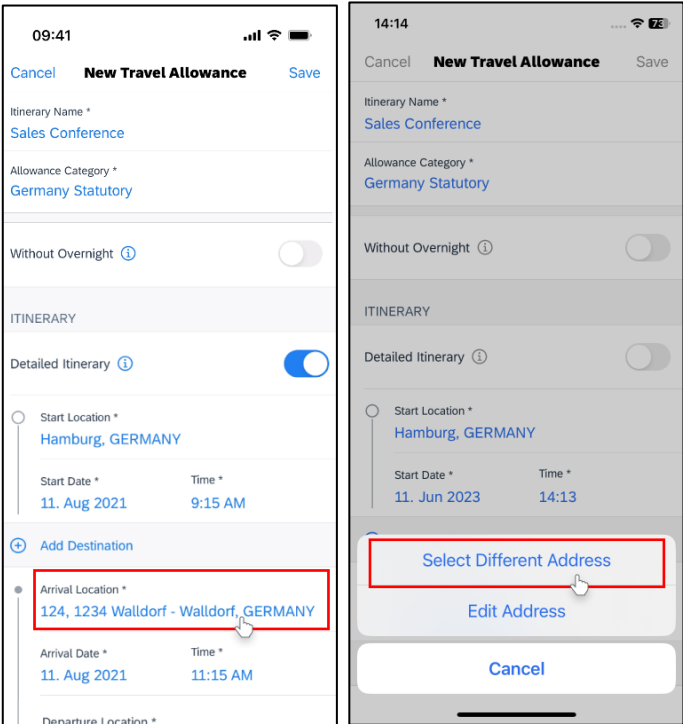
Screen(s)	Description/Action
	The itinerary without overnight appears on the **Travel Allowance** screen. **NOTE:** With the **Without Overnight** toggle enabled, the first itinerary in the list will display the daily allowances in accordance with the 24-hour rule showing 0.00€ for the second day. Also, the **Lodging Type** field on the **Daily Allowance** screen will appear again.
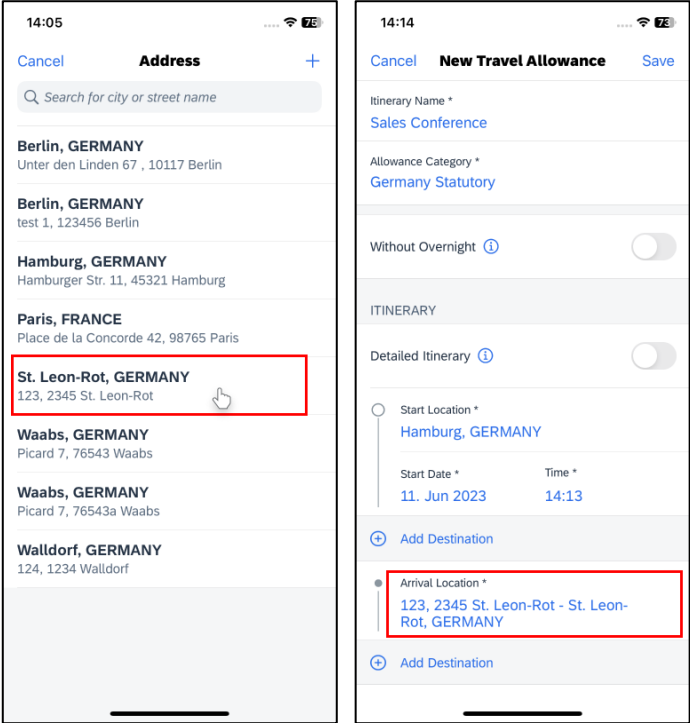
CREATE A NEW FIXED TRAVEL ALLOWANCE WITH A BORDER CROSSING IN AN EXPENSE REPORT

Screen(s)	Description/Action
9:25 .ıll 🤍 ▬ Cancel **New Travel Allowance** Save Itinerary Name * Sales Conference Allowance Category * Api tests with Border Crossing -> Do not touch Trip Type None Without Overnight ⓘ 🔵 ITINERARY ◯ Start Location * Hamburg, GERMANY Start Date * Time * 11. Aug 2021 9:15 AM ⊕ Add Destination ● Arrival Location * Haguenau, FRANCE Arrival Date * Time * 11. Aug 2021 11:15 AM Border Crossing * Time * ⓘ 11. Aug 2021 11:15 AM Departure Location * Haguenau, FRANCE Departure Date * Time * 13. Aug 2021 10:15 AM ⊕ Add Destination End Location * Hamburg, GERMANY End Date * Time * 13. Aug 2021 12:15 PM ◉ Border Crossing * Time * ⓘ 13. Aug 2021 12:15 PM	To create a new fixed travel allowance with a border crossing in an expense report: 1) On home screen, tap **Expense Reports**. 2) On the **Reports** screen, tap the desired expense report. 3) On the **Report** screen, tap the **Details** tab. 4) On the **Details** tab, tap **Claim Travel Allowance** (or **Travel Allowance Itineraries & Adjustments**). 5) On the **New Travel Allowance** screen: • Select an allowance category that supports the border crossing feature. • Fill in the fields and make the desired selections. • Tap **Save** (upper-right corner).
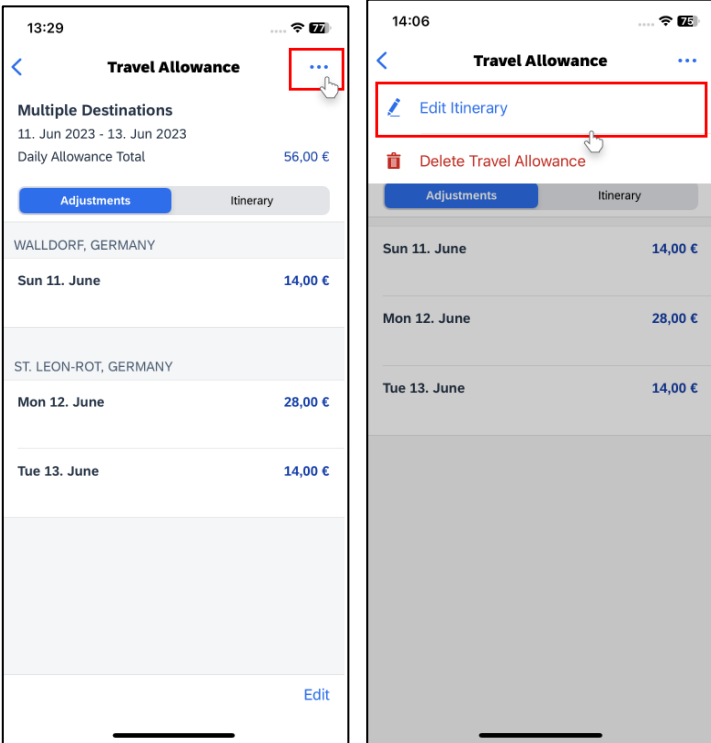
Screen(s)	Description/Action
	The border crossing itinerary appears on the on the **Itinerary** tab on the **Travel Allowance** screen. **NOTE:** This field will not appear - on the **Itinerary** tab – if you have not traveled to another country during your trip.

SELECT A DIFFERENT ADDRESS IN A NEW TRAVEL ALLOWANCE
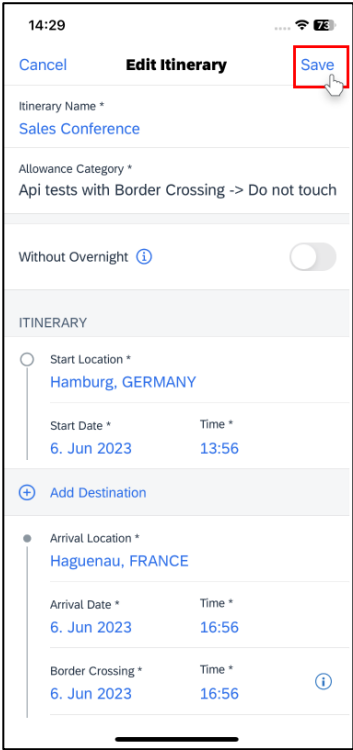
Screen(s)	Description/Action
	To select a different address in a new fixed travel allowance: 1) On home screen, tap **Expense Reports**. 2) On the **Reports** screen, tap the desired expense report. 3) On the **Report** screen, tap the **Details** tab. 4) On the **Details** tab, tap **Claim Travel Allowance** (or **Travel Allowance Itineraries & Adjustments**). 5) On the **New Travel Allowance** screen, tap the **Arrival Location** field. 6) On the menu, tap **Select Different Address**.

Screen(s)	Description/Action
	7) On the **Address** screen, tap the desired address. The changed address appears on the **New Travel Allowance** screen.
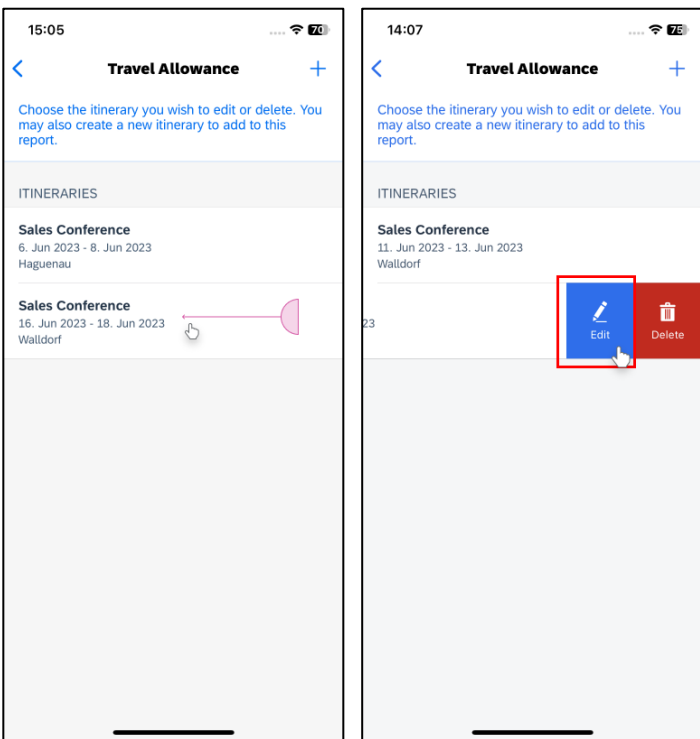
EDIT A FIXED TRAVEL ALLOWANCE ITINERARY
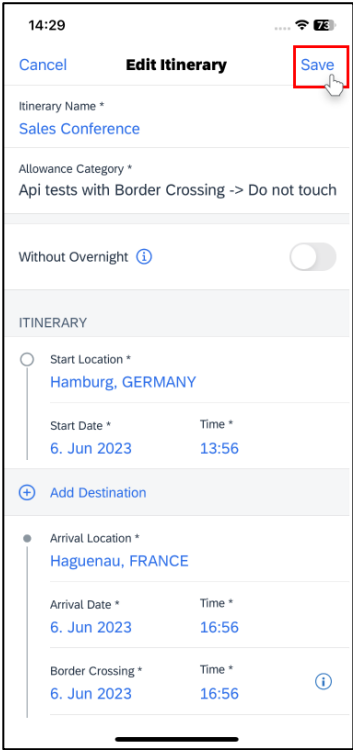
Screen(s)	Description/Action
	To edit a fixed travel allowance: 1) On home screen, tap **Expense**. 2) On the **Reports** screen, tap the desired expense report. 3) On the **Report** screen, tap the **Details** tab. 4) On the **Details** tab, tap **Travel Allowance Itineraries & Adjustments**. 5) From the **Travel Allowance** screen, on the **Itineraries** tab, tap the desired itinerary. 6) On the **Travel Allowance** screen, tap ••• (upper-right corner). 7) On the menu, tap **Edit Itinerary**.

Screen(s)	Description/Action
	8) On the **Edit Itinerary** screen: • Edit the fields • Make the desired selections 9) When done, tap **Save** (upper-right corner). **NOTE:** Depending on which category is in the **Allowance Category** field, the user can adjust the itinerary details.

EDIT A FIXED TRAVEL ALLOWANCE ITINERARY ON THE TRAVEL ALLOWANCE SCREEN

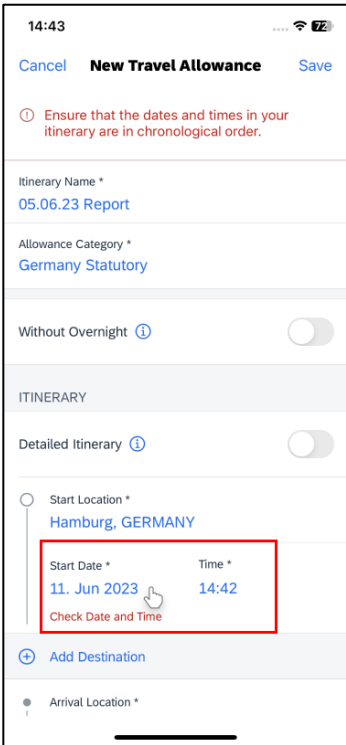| Screen(s)	Description/Action
	To edit a fixed travel allowance on the **Travel Allowance** screen: 1) On home screen, tap **Expense Reports**. 2) On the **Reports** screen, tap the desired expense report. 3) On the **Report** screen, tap the **Details** tab. 4) On the **Details** tab, tap **Travel Allowance Itineraries & Adjustments**. 5) On the **Travel Allowance** screen, swipe the desired itinerary to the left. **NOTE:** This screen will only appear if there is more than one itinerary attached to a report.

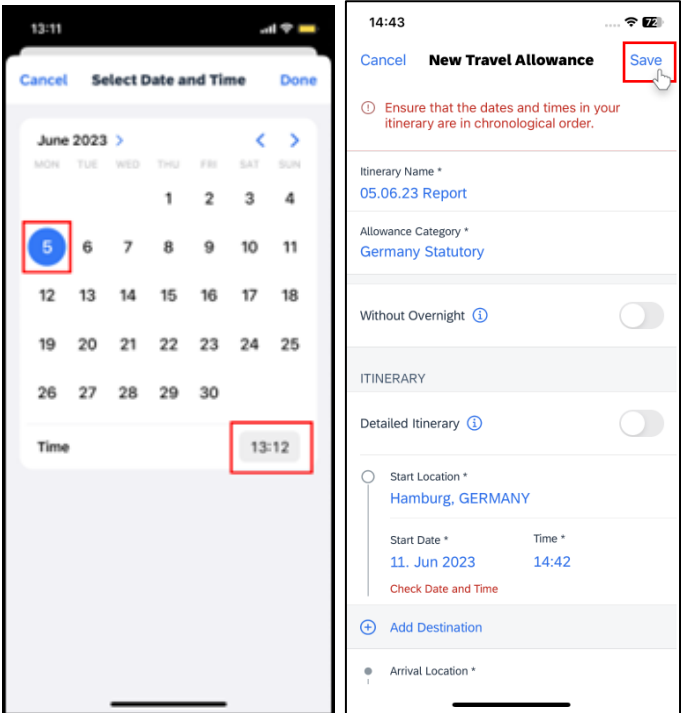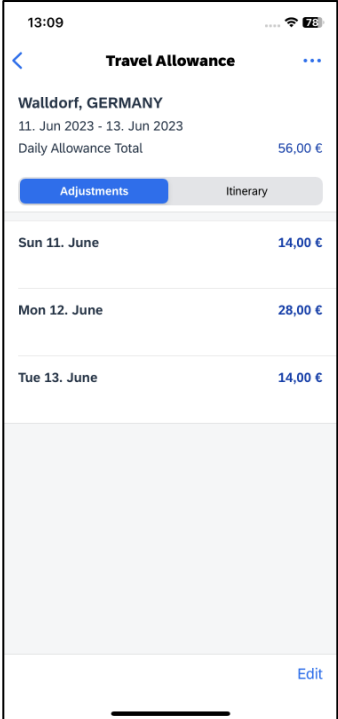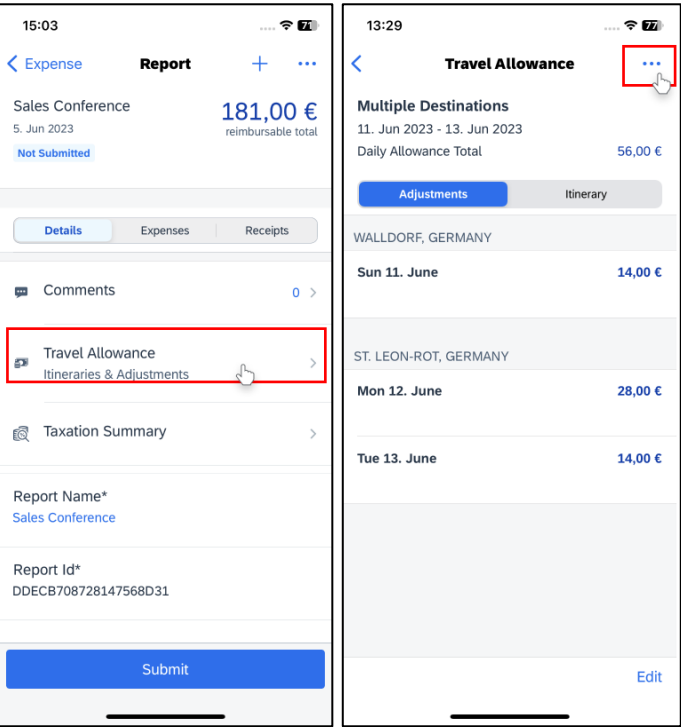| Screen(s)	Description/Action
	6) On the **Edit Itinerary** screen: • Edit the fields • Make the desired selections 7) When done, tap **Save** (upper-right corner). **NOTE:** Depending on which category is in the **Allowance Category** field, the user can adjust the itinerary details.
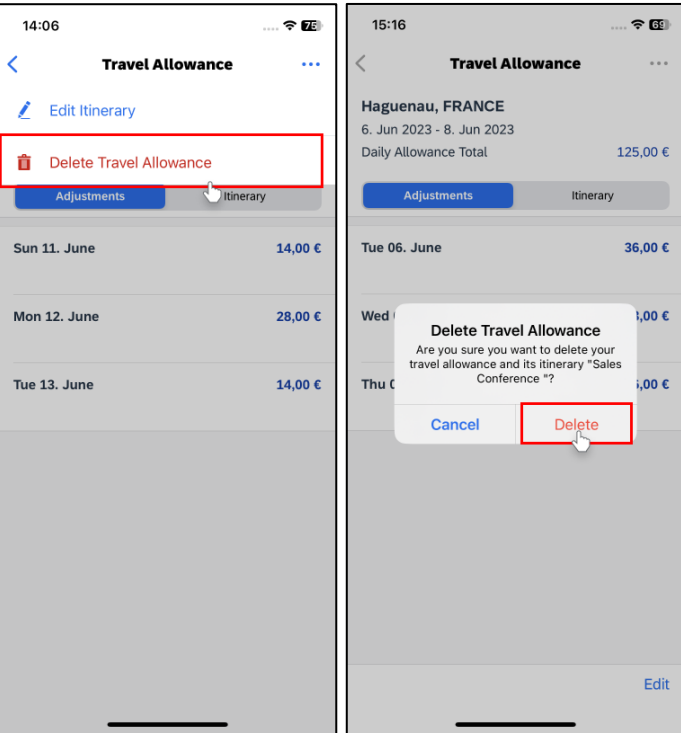
RESOLVE AN ALERT IN A NEW TRAVEL ALLOWANCE
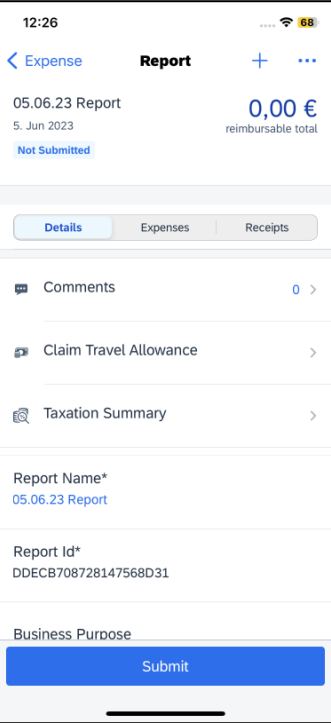
Screen(s)	Description/Action
	To resolve an alert in a new fixed travel allowance: 1) On home screen, tap **Expense Reports**. 2) On the **Reports** screen, tap the desired expense report. 3) On the **Report** screen, tap the **Details** tab. 4) On the **Details** tab, tap **Claim Travel Allowance** (or **Travel Allowance Itineraries & Adjustments**). 5) On the **New Travel Allowance** screen: • Fill in the fields and make the desired selections. • Tap **Save** (upper-right corner). After the system attempts to save the travel allowance, an alert appears at the top of the **New Travel Allowance** screen.

Screen(s)		Description/Action
		6) Tap the desired field to correct. 7) On the **Select Date and Time** screen, tap the desired date, select the desired time, and then tap **Done** (upper-right corner). 8) When done, tap **Save** (upper-right corner).
		The alert and red text no longer appear on the **New Travel Allowance** screen.
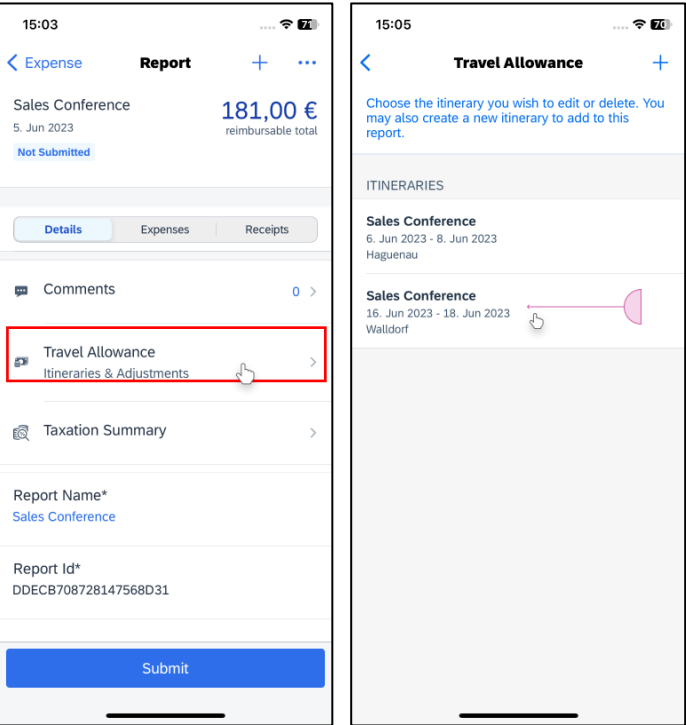
DELETE TRAVEL ALLOWANCES
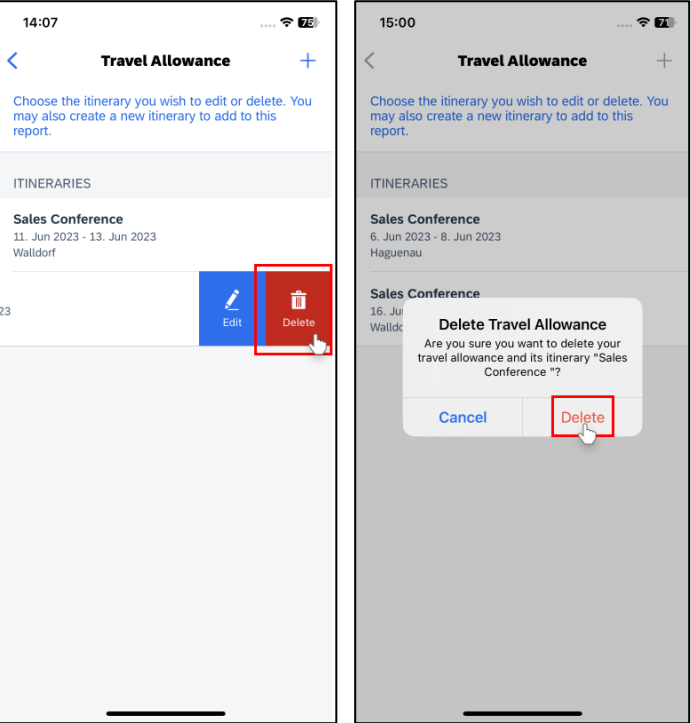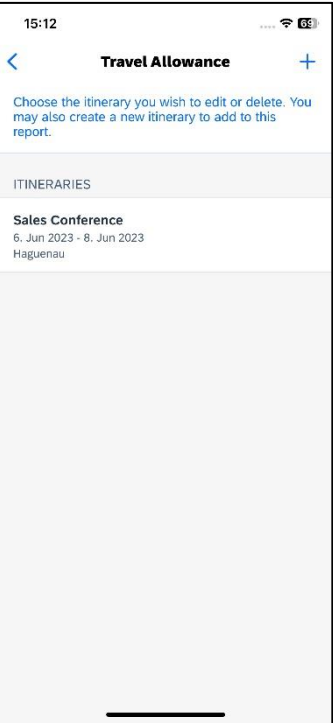
DELETE A TRAVEL ALLOWANCE FROM AN EXPENSE REPORT

Screen(s)	Description/Action
	To delete a fixed travel allowance from an expense report: 1) On the **Report** screen, tap the **Details** tab. 2) On the **Details** tab, tap **Travel Allowance Itineraries & Adjustments**. 3) On the **Travel Allowance** screen, tap ••• (upper-right corner).
	4) On the menu, tap **Delete Travel Allowance**. 6) On the **Delete Travel Allowance** window, tap **Delete**.

Screen(s)	Description/Action
	7)On the **Report** screen all travel allowance expenses are gone and the button on the Details tab is called **Claim Travel Allowance** again.

DELETE A TRAVEL ALLOWANCE WITH MULTIPLE ITINERARIES

Screen(s)	Description/Action
	To delete a travel allowance from the **Travel Allowance** screen: 1) On the home screen, tap **Expense Reports**. 2) On **Reports** screen, tap the desired expense report. 3) On the **Report** screen, tap the **Details** tab. 4) On the **Details** tab, tap **Travel Allowance Itineraries & Adjustments**. 5) On the **Travel Allowance** screen, in the **Itineraries** section, swipe the desired itinerary to the left. **NOTE:** The **Travel Itineraries** screen only appears when there are multiple itineraries are attached to the report.

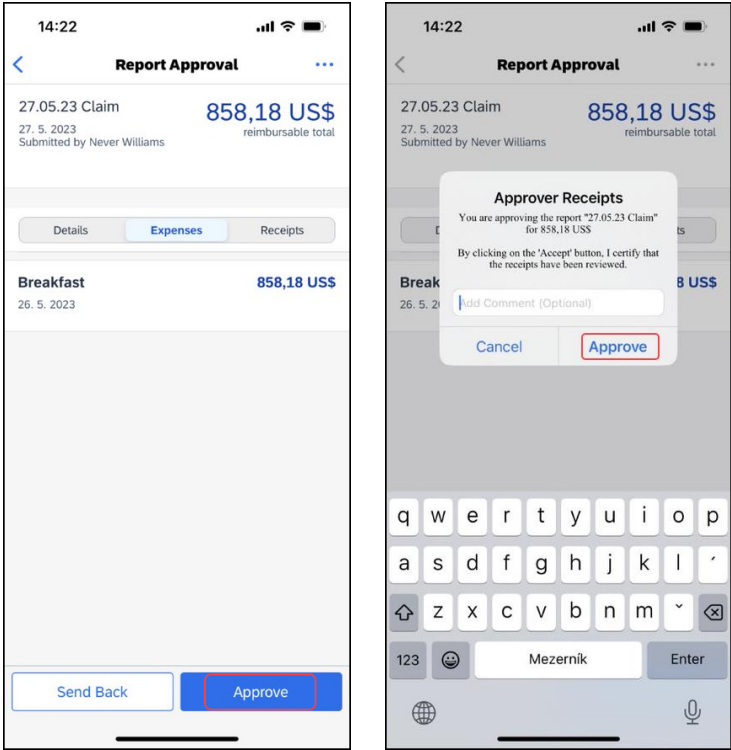| Screen(s)		Description/Action
		6) Tap **Delete**. 7) On the **Delete Travel Allowance** window, tap **Delete**.
		8) The itinerary no longer appears in the **Itineraries** section of the **Travel Allowance** screen.

Expense Approvals

Use **Approvals** on the home screen to view, approve, or send back expense reports (if you are a report approver or cost objects approver).
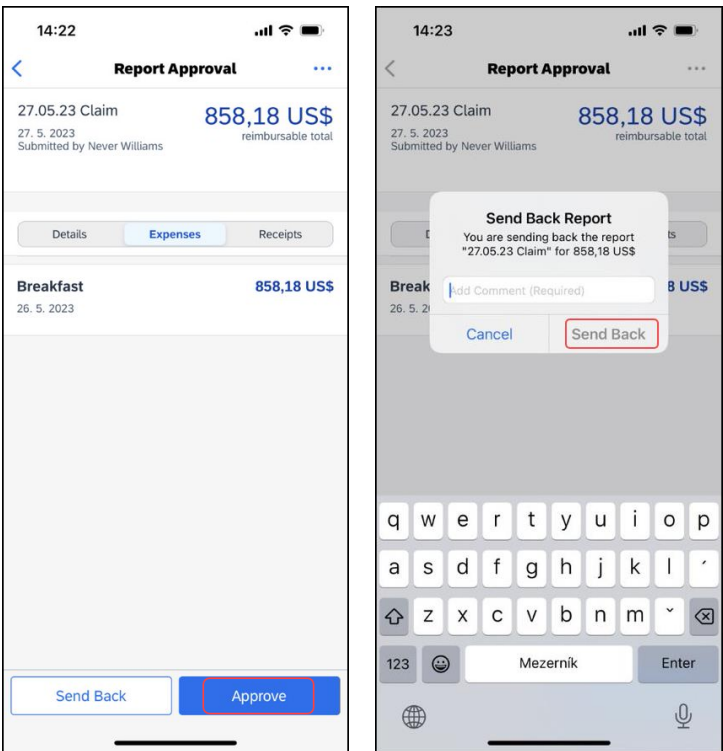
NOTE: Depending on your configuration, you may be able to bypass any remaining approvers and send the expense report directly to Accounting Review. If so, when you select **Approve**, this menu appears. Tap:

 - Additional approver required to approve the report and send the report to the next approver in the workflow.

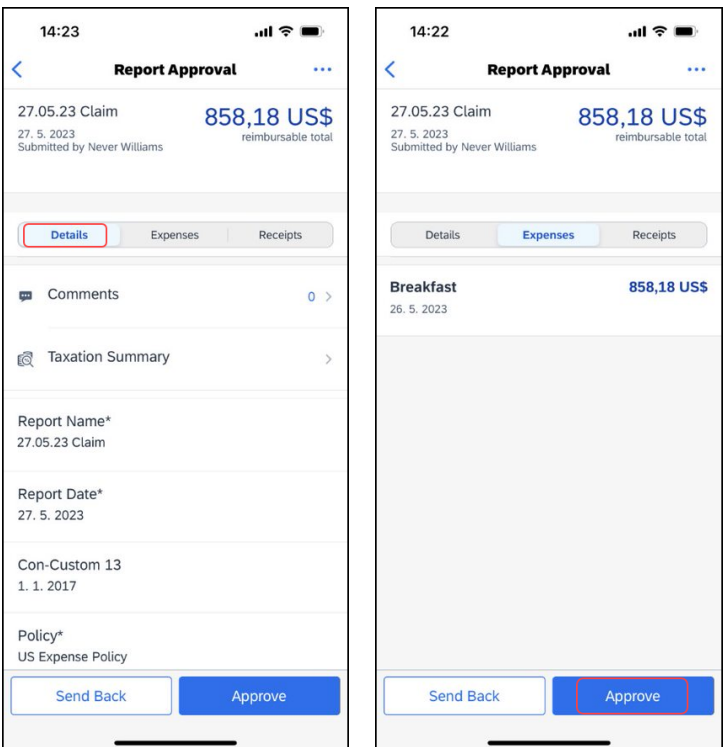 **- Approve report** to approve the report and send it directly to Accounting Review.

Approve an Expense Report

Screen(s)	Description/Action
	To approve an expense report:
	1) On the home screen, tap **Approvals**.
	2) On the **Approvals** screen, tap the desired expense report.
	3) On the **Report Approval** screen, tap **Approve**.
	4) On the **Approve Report** box, enter the desired comment.
	5) Tap **Approve**.

Send Back an Expense Report

Screen(s)	Description/Action
	To send back an expense report: 1) On the home screen, tap **Approvals**. 2) On the **Approvals** screen, tap the desired expense report. 3) On the **Report Approval** screen, tap **Send Back**. 4) In the **Send Back Report** box, enter the desired comment. 5) Tap **Send Back**.

Review and Approve an Expense as a Cost Object Approver

Screen(s)	Description/Action
	To review and approve an expense as a Cost Object Approver: 1) On the home screen, tap **Approvals**. 2) On the **Approvals** screen, tap the desired expense report. 3) On the **Report Approval** screen, tap the **Details** tab. 4) When ready to approve an expense, tap **Approve**.