



Concur

(Toastmasters Expense Management system)

**To be read in conjunction with the
District 91 Finance Guide 2025-26**

Last Update: 24/10/25 (Guler Cortis)

Table of Contents

	PAGES(S)
WHAT IS CONCUR	3 - 4
USER REQUEST & SETUP	6
Registration & 1st Login	7 - 18
Completing Your User Profile	19 - 23
LOGIN	24 - 26
HOW TO: Submit a MILEAGE Expense Claim	27 - 37
HOW TO: Submit a District INCENTIVE Claim	38 - 53
HOW TO: Submit a MISC. Expense Claim	54 - 65

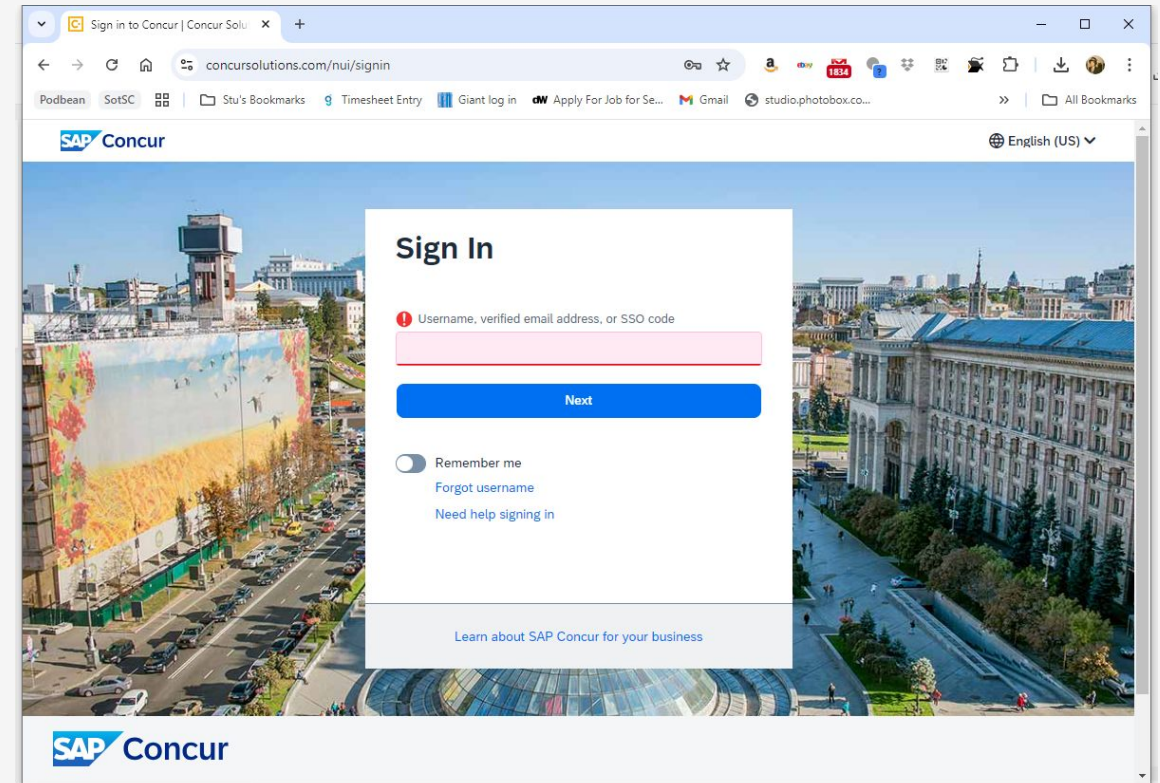
What is Concur?

What is Concur?

- **Concur** is the **Expense Management system** used by Toastmasters International for:
 - The **Submission** of Expense Claims
 - The **Approval** of Expense Claims

You can access Concur using the following link:

www.concursolutions.com



User Request & Setup

User Request & Setup

Toastmasters Members are **NOT** automatically setup as Concur Users.

*The only exception is the **District Executive Committee (DLT + Division Directors + Area Directors)**, whose members are setup at the start of a new Toastmasters term.*

Club Officers & Club Members

- **NOT** setup as Concur users by default
- Concur access must be requested as required
(i.e. if their club qualifies for an incentive award)
- Email the D91 Finance Manager to request access –

Please provide the following info



Users must be activated by WHQ

The D91 Finance Manager will confirm via email when the member's Concur access has been activated.

Concur User Request – Information Required

- First Name
- Last Name
- Toastmasters Membership ID:
- Email Address *(as used by the member to register with Toastmasters)*
- Role *(i.e. Club President/Treasurer)*
- Club Name
- Country of Residence

Registration & 1st Login

Registration

1st Login

Concur Username =

memberID@toastmasters.org

Member ID must be 8 digits.

For example:

12345678@toastmasters.org

If your Member ID is only 7 digits, then add a leading '0'.

For example:

01234567@toastmasters.org

Go to www.concursolutions.com

Sign in to Concur | Concur Solu

concursolutions.c...

Podbean SotSC Stu's Bookmarks Timesheet Entry Giant log in All Bookmarks

SAP Concur English (US)

Sign In

Username, verified email address, or SSO code

67625898@toastmasters.org

Next

☐ Remember me

[Forgot username](#)

[Need help signing in](#)

[Learn about SAP Concur for your business](#)

SAP Concur

Select 'SAP Concur Password'

Sign in to Concur | Concur Solu

concursolutions.c...

Podbean SotSC Stu's Bookmarks Timesheet Entry Giant log in All Bookmarks

SAP Concur English (US)

< Sign In

67625898@toastmasters.org

Sign in with:

SAP Concur Password

OR

Sign in with an email link

[Learn about SAP Concur for your business](#)

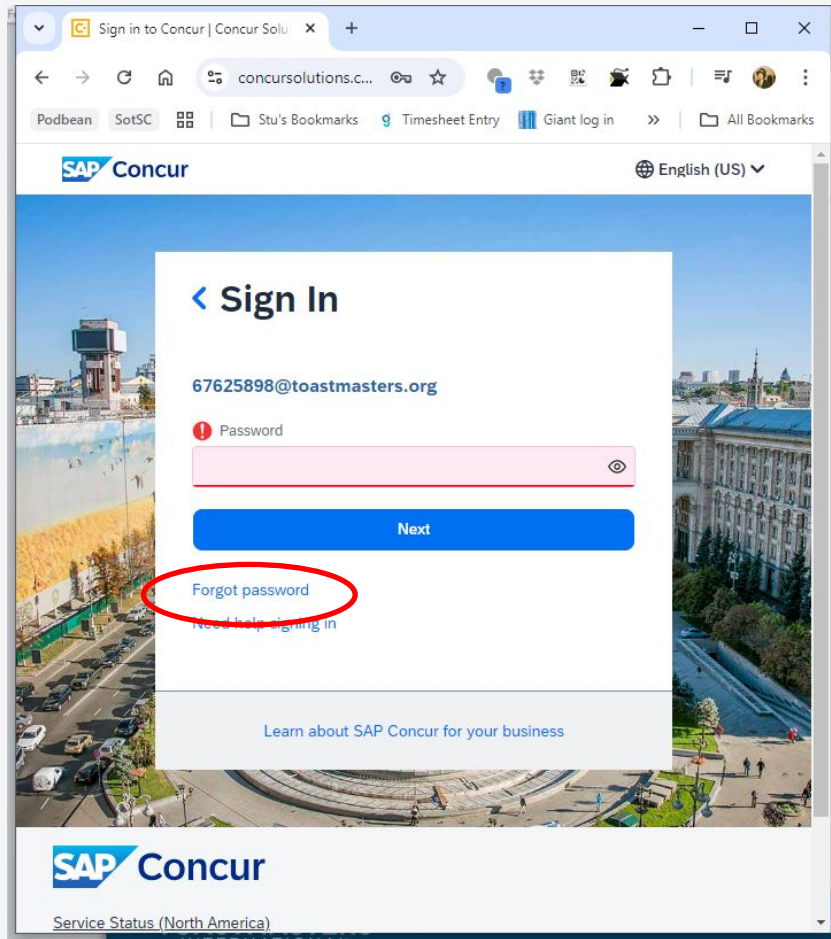
SAP Concur

[Service Status \(North America\)](#)

[Cookie Preferences](#)

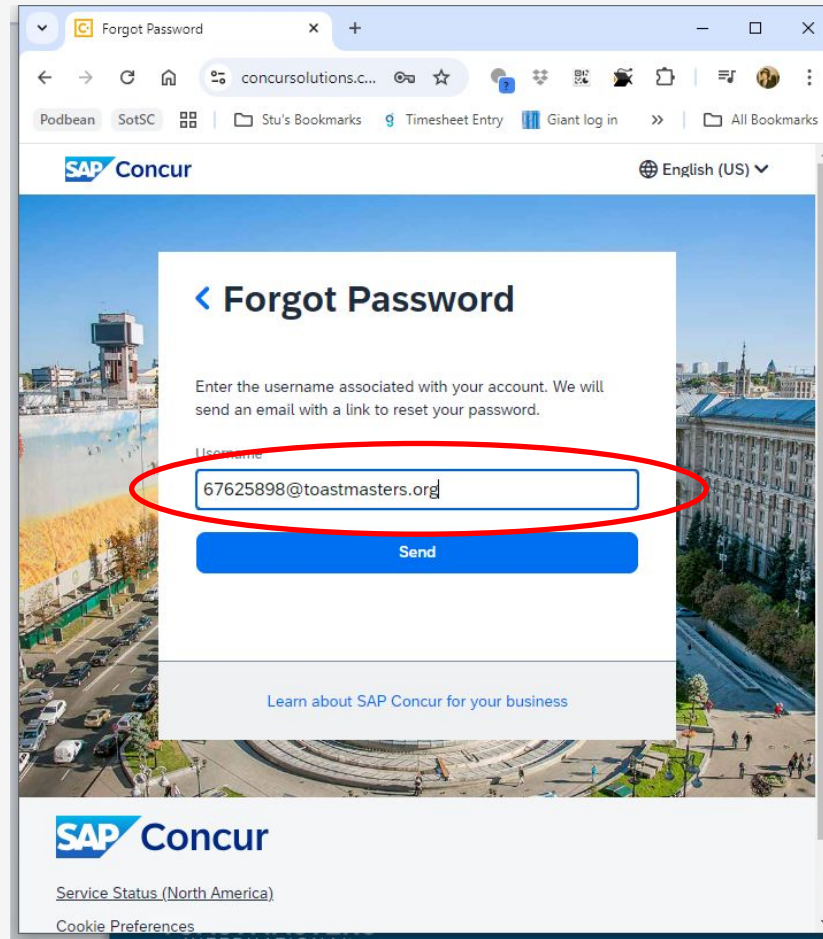
Registration

Select 'Forgot Password'



The screenshot shows the SAP Concur Sign In page. The page has a header with the SAP Concur logo and a language dropdown set to English (US). The main content area is titled 'Sign In' and contains a form with a username field (67625898@toastmasters.org) and a password field. Below the password field is a blue 'Next' button. A red circle highlights the 'Forgot password' link, which is located below the 'Next' button. Below the 'Forgot password' link is a link that says 'Need help signing in?'. At the bottom of the page, there is a link that says 'Learn about SAP Concur for your business' and the SAP Concur logo.

Hit 'Send'



The screenshot shows the SAP Concur Forgot Password page. The page has a header with the SAP Concur logo and a language dropdown set to English (US). The main content area is titled 'Forgot Password' and contains a form with a 'Username' field (67625898@toastmasters.org) and a blue 'Send' button. A red circle highlights the 'Send' button. Below the 'Send' button is a link that says 'Learn about SAP Concur for your business'. At the bottom of the page, there is a link that says 'Service Status (North America)' and a link that says 'Cookie Preferences'.

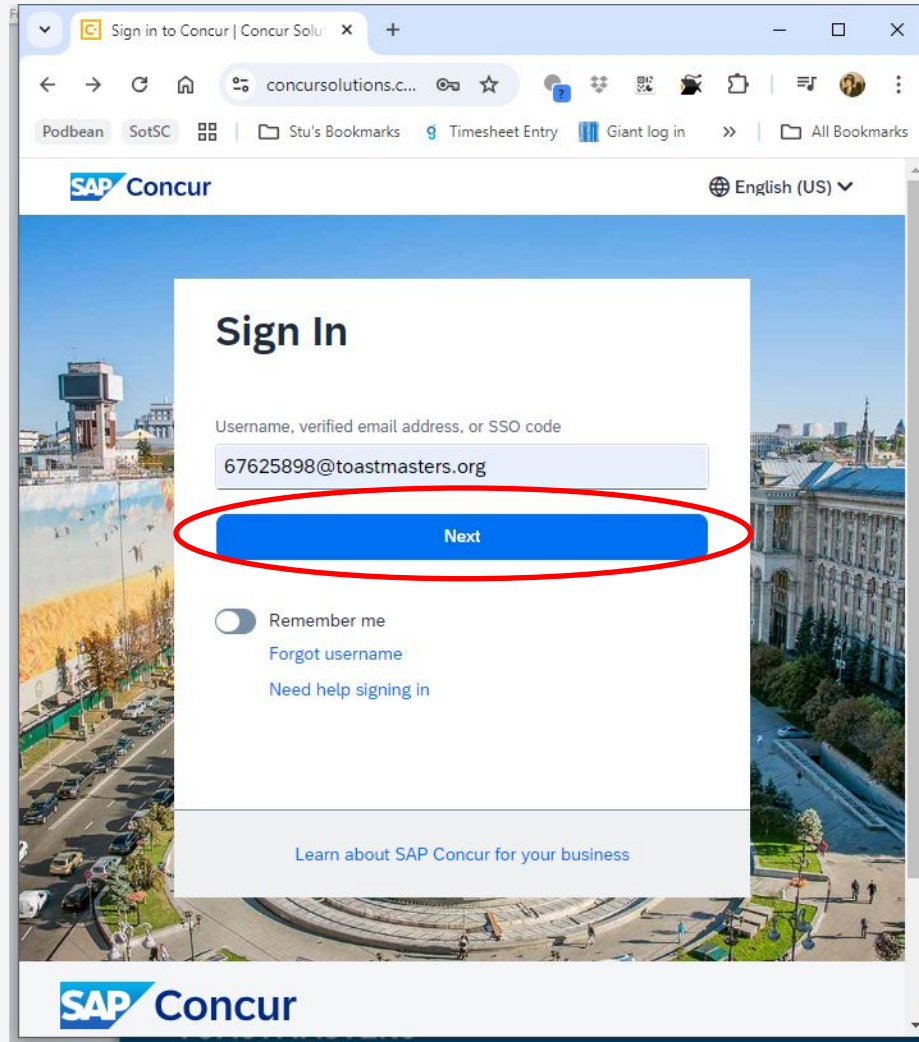
Hitting 'Send' will send an email (to the email address that you used to register with Toastmasters) with instructions on how to reset password.

Check your email and follow the instructions to reset your password.

Registration

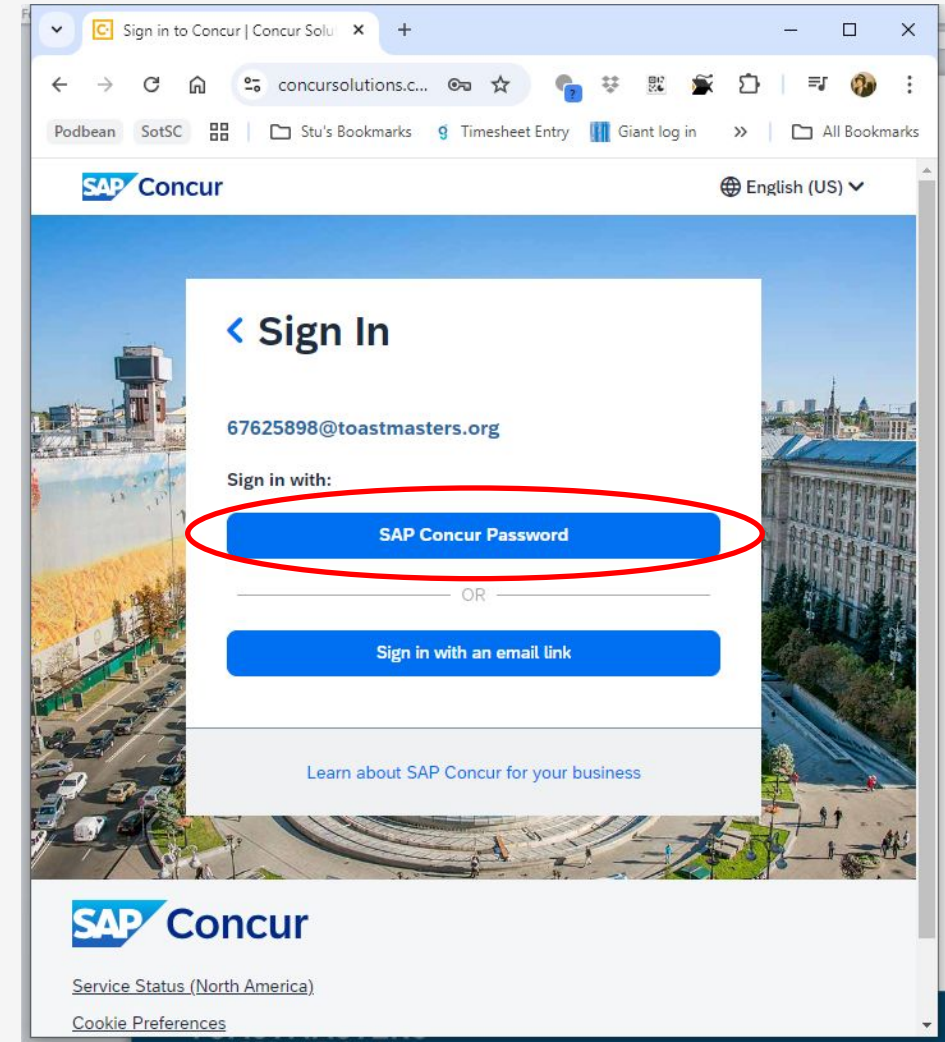
Once you have reset your password, restart the sign-in process.

Restart Sign-In Process > Enter Username & hit 'Next'



The screenshot shows the SAP Concur Sign In page. The browser address bar displays 'concursolutions.c...'. The page header includes the SAP Concur logo and a language dropdown set to 'English (US)'. The main content area has a 'Sign In' heading and a text input field containing '67625898@toastmasters.org'. Below the input field, the blue 'Next' button is circled in red. There are also links for 'Forgot username' and 'Need help signing in', and a footer link 'Learn about SAP Concur for your business'.

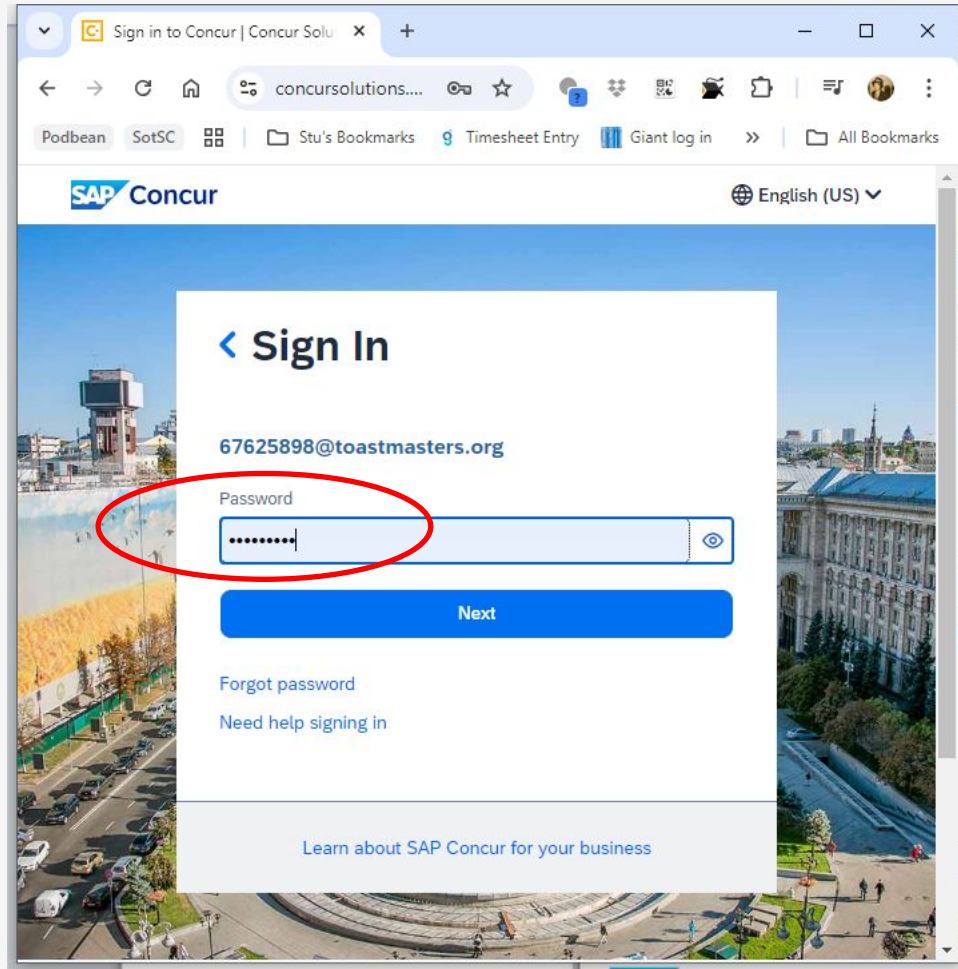
Select 'SAP Concur Password'



The screenshot shows the SAP Concur Sign In page after the 'Next' button was clicked. The browser address bar displays 'concursolutions.c...'. The page header includes the SAP Concur logo and a language dropdown set to 'English (US)'. The main content area has a 'Sign In' heading with a back arrow. The text input field now displays '67625898@toastmasters.org'. Below the input field, the 'Sign in with:' section shows the 'SAP Concur Password' button circled in red. There is also a 'Sign in with an email link' button and a footer link 'Learn about SAP Concur for your business'.

Registration > Two-Factor Authentication

Enter Your Password



Sign in to Concur | Concur Solu x +

concursolutions....

Podbean SotSC

Stu's Bookmarks Timesheet Entry Giant log in All Bookmarks

SAP Concur English (US)

< Sign In

67625898@toastmasters.org

Password

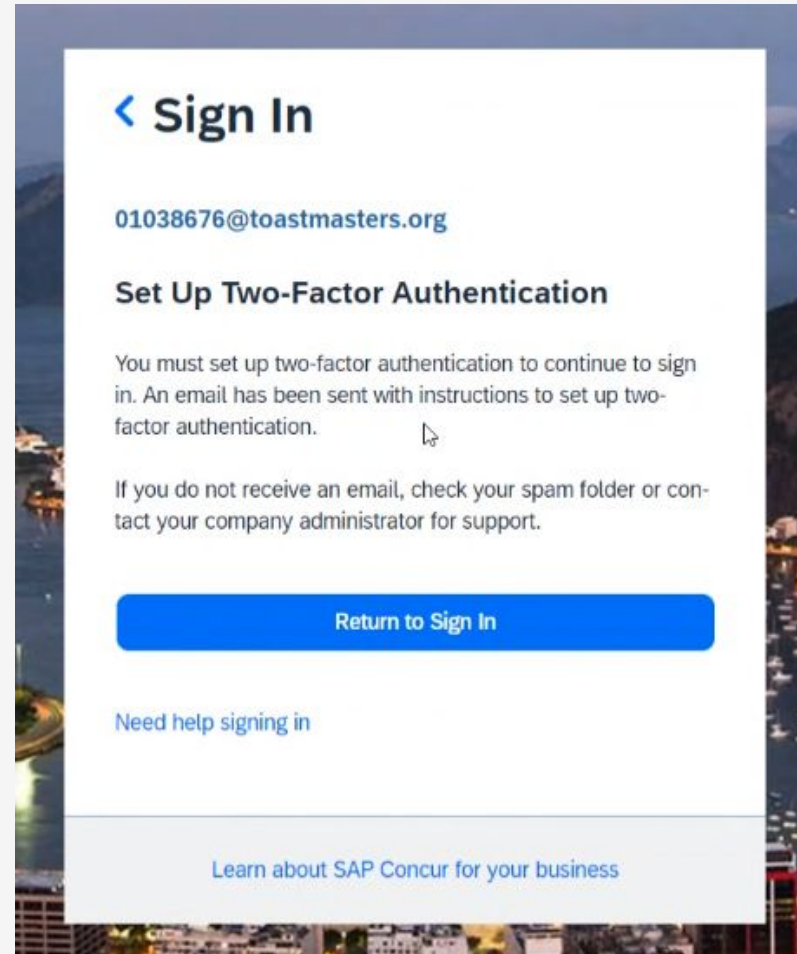
Next

[Forgot password](#)

[Need help signing in](#)

[Learn about SAP Concur for your business](#)

Two-Factor Authentication must be setup...



< Sign In

01038676@toastmasters.org

Set Up Two-Factor Authentication

You must set up two-factor authentication to continue to sign in. An email has been sent with instructions to set up two-factor authentication.

If you do not receive an email, check your spam folder or contact your company administrator for support.

Return to Sign In

[Need help signing in](#)

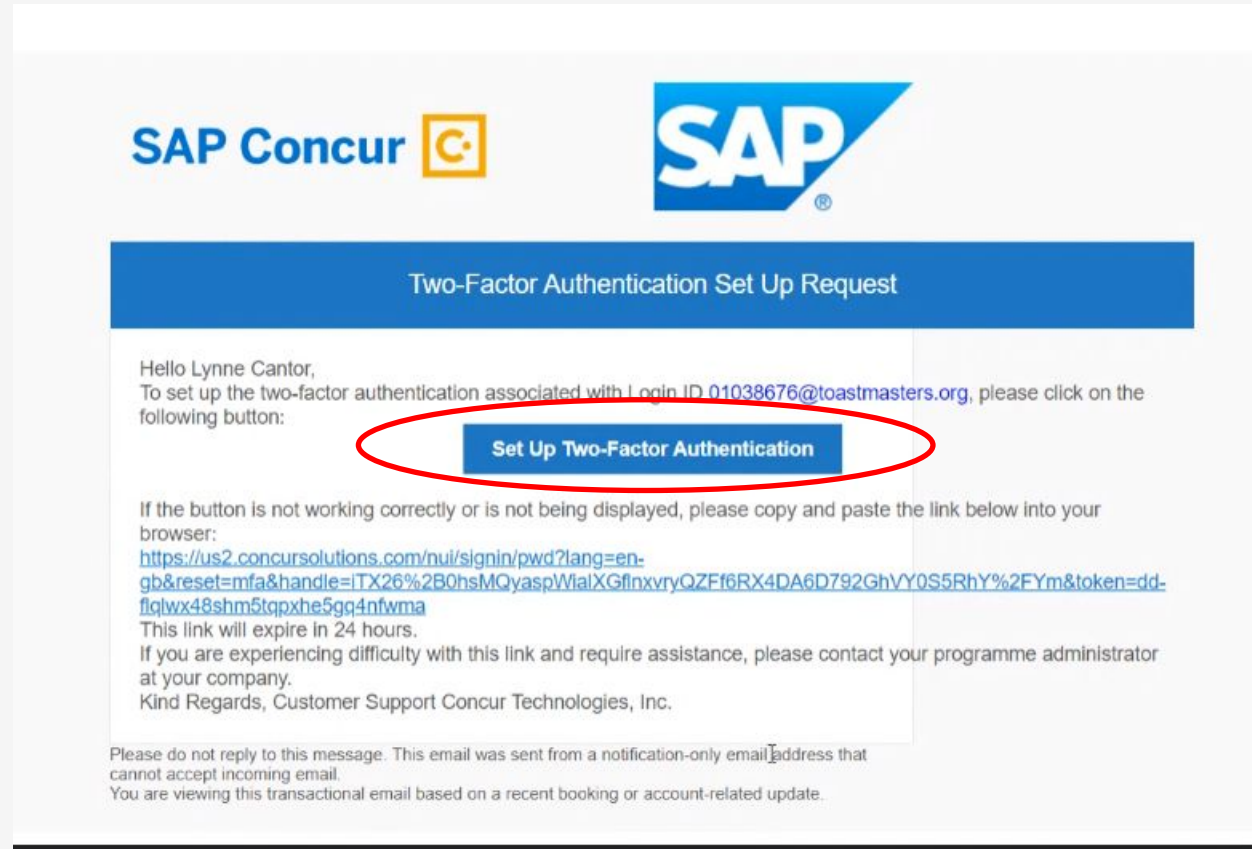
[Learn about SAP Concur for your business](#)

An email is automatically sent (to the email address that you used to register with Toastmasters) with instructions on how to set up two-factor authentication.

Registration > Two-Factor Authentication

An email (as shown here) will be sent from 'noreply@concur.com' (to the email address that you used to register with Toastmasters).

Hit 'Set Up Two-Factor Authentication'.



Registration > Two-Factor Authentication

Restart Sign-In Process > Enter Username & hit 'Next'

Select 'SAP Concur Password'

Restart the sign-in process.

Sign in to Concur | Concur Solutions

concursolutions.c...

Podbean SotSC Stu's Bookmarks Timesheet Entry Giant log in All Bookmarks

SAP Concur English (US)

Sign In

Username, verified email address, or SSO code

67625898@toastmasters.org

Next

☐ Remember me

[Forgot username](#)

[Need help signing in](#)

[Learn about SAP Concur for your business](#)

SAP Concur

Sign in to Concur | Concur Solutions

concursolutions.c...

Podbean SotSC Stu's Bookmarks Timesheet Entry Giant log in All Bookmarks

SAP Concur English (US)

< Sign In

67625898@toastmasters.org

Sign in with:

SAP Concur Password

OR

Sign in with an email link

[Learn about SAP Concur for your business](#)

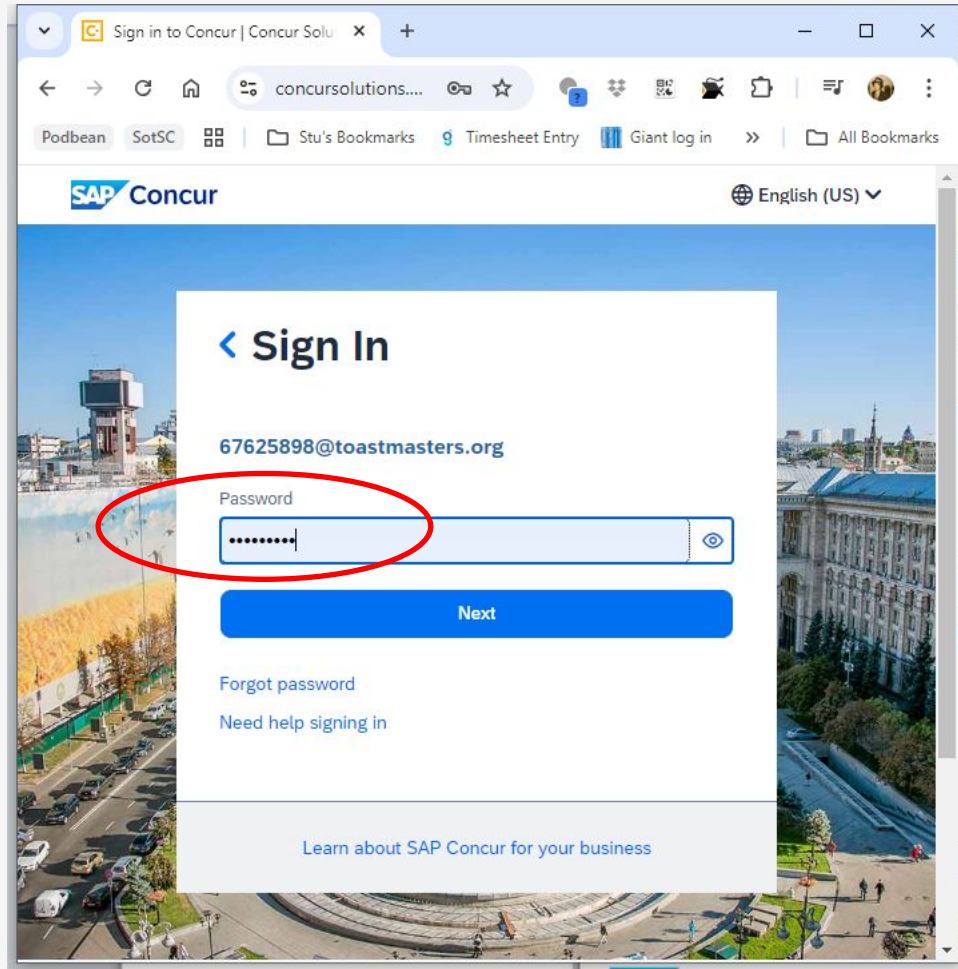
SAP Concur

[Service Status \(North America\)](#)

[Cookie Preferences](#)

Registration > Two-Factor Authentication

Enter Your Password



Sign in to Concur | Concur Solu x +

concursolutions....

Podbean SotSC Stu's Bookmarks Timesheet Entry Giant log in All Bookmarks

SAP Concur English (US)

< Sign In

67625898@toastmasters.org

Password

.....

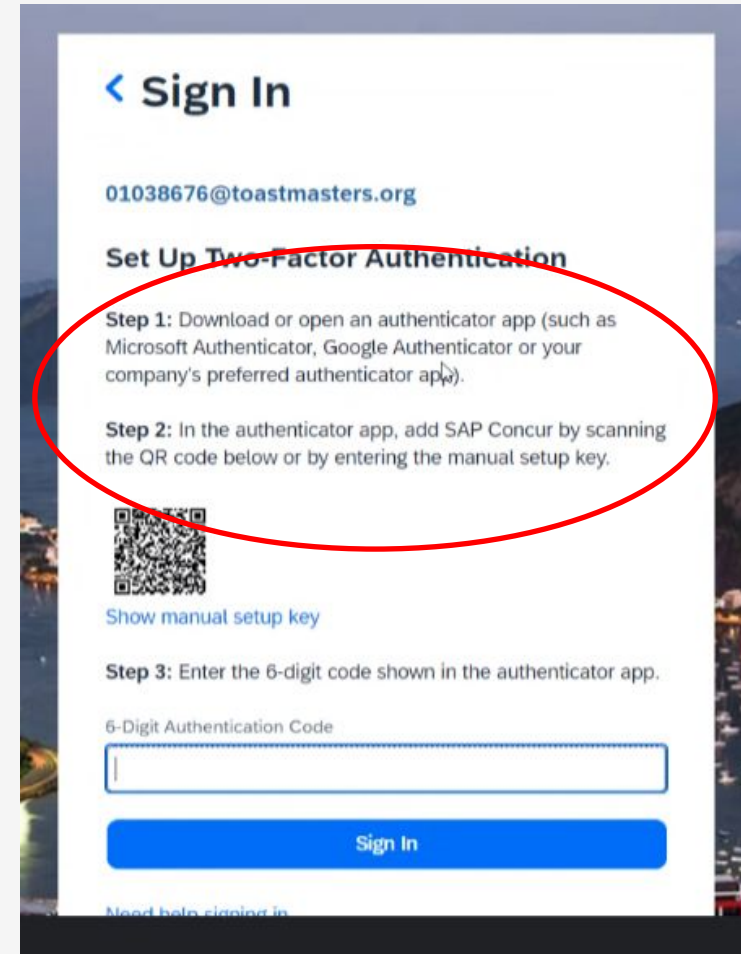
Next

[Forgot password](#)

[Need help signing in](#)

[Learn about SAP Concur for your business](#)

Set Up Two-Factor Authentication...



< Sign In

01038676@toastmasters.org

Set Up Two-Factor Authentication

Step 1: Download or open an authenticator app (such as Microsoft Authenticator, Google Authenticator or your company's preferred authenticator app).

Step 2: In the authenticator app, add SAP Concur by scanning the QR code below or by entering the manual setup key.



[Show manual setup key](#)

Step 3: Enter the 6-digit code shown in the authenticator app.

6-Digit Authentication Code

.....

Sign In

[Need help signing in](#)

Complete Steps 1 & 2

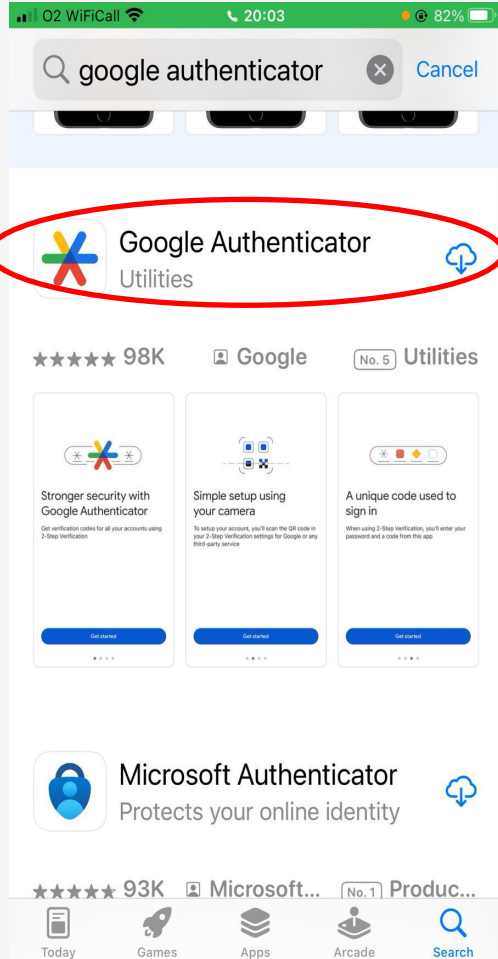
Registration > Two-Factor Authentication

STEP 1:

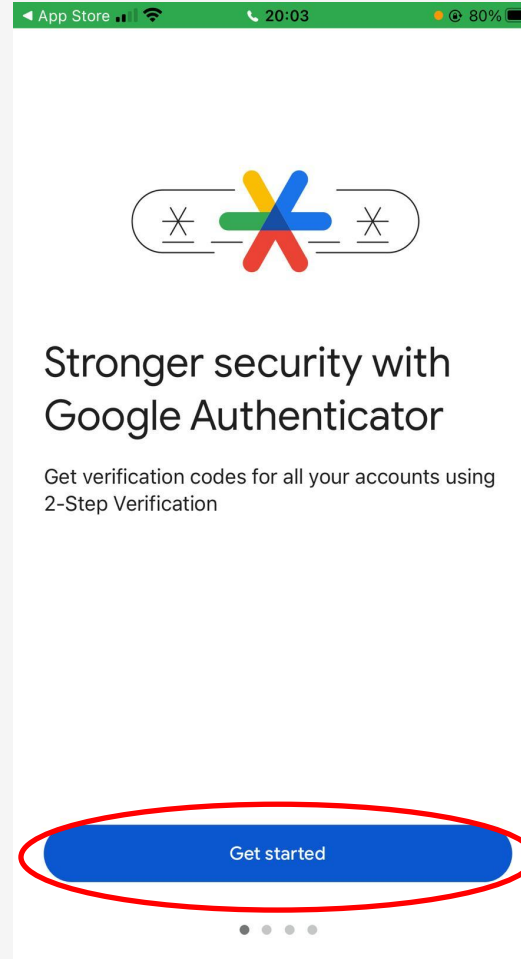
Download an Authenticator App.

The example shown here is 'Google Authenticator' (shown in the Apple App store, but also available from Google Play)

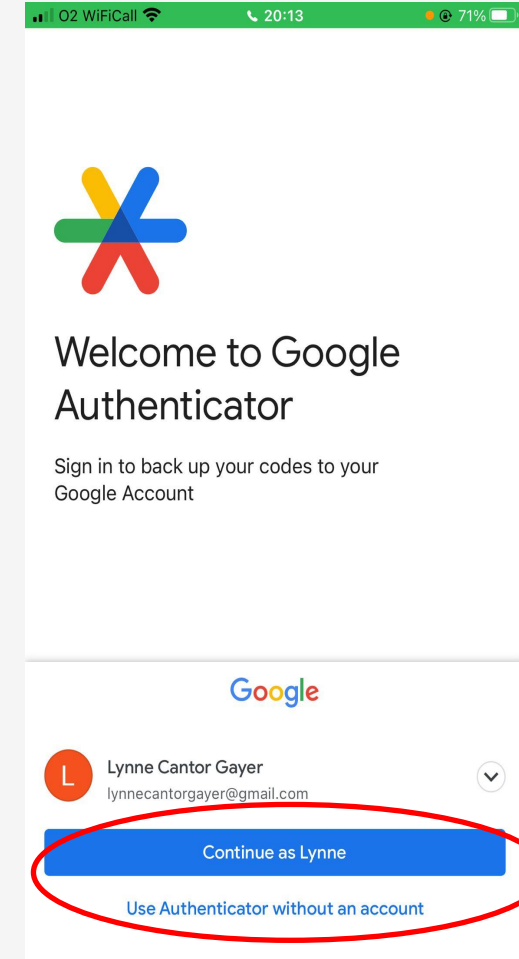
Download an Authenticator App



Set Up Authenticator App



Login with Google Account OR Use without an account

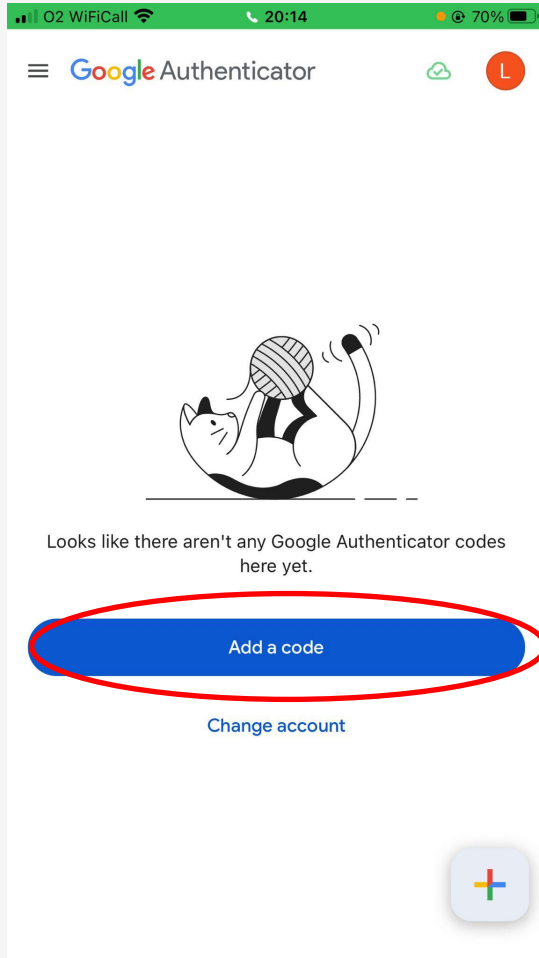


Registration > Two-Factor Authentication

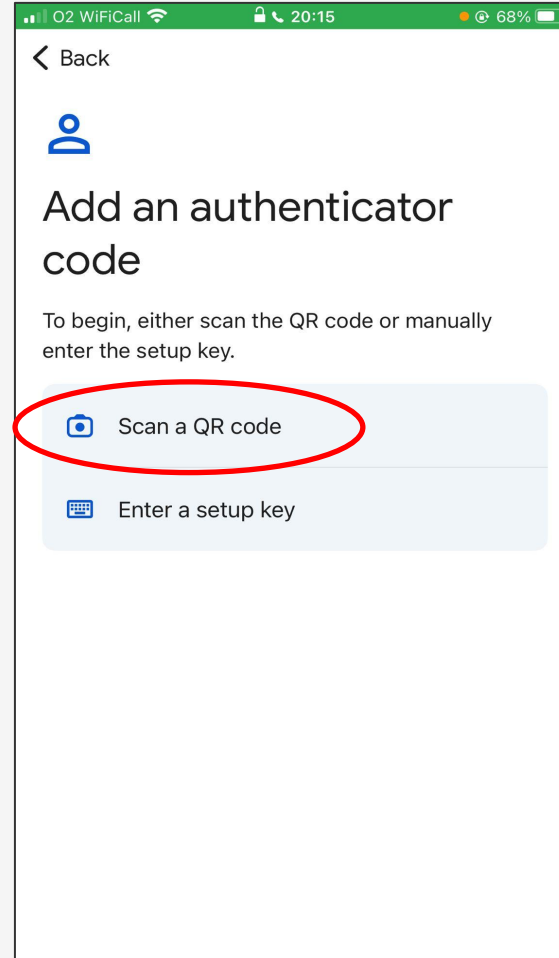
Select 'Add a Code'

STEP 2:

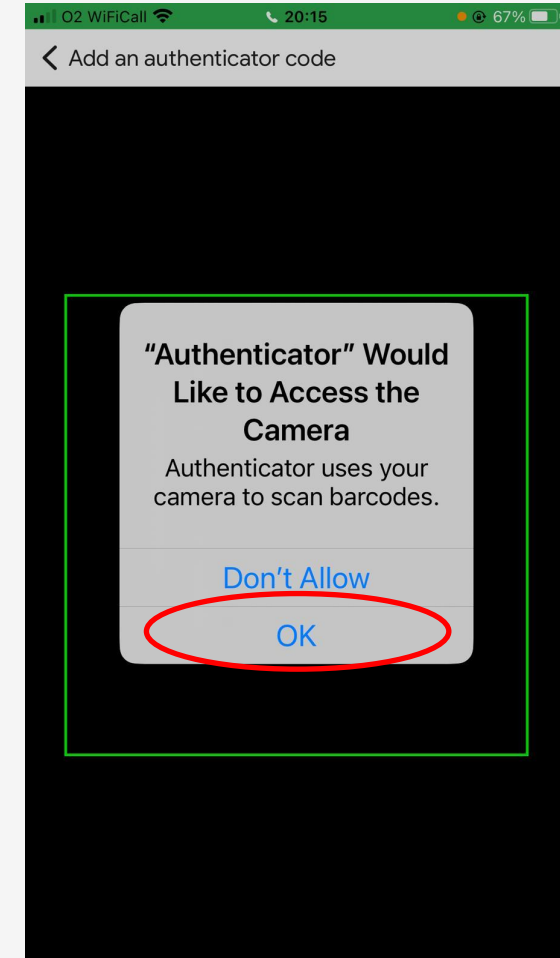
Add Concur by Scanning the QR Code on the Concur Log in Screen.



Add an Authenticator Code



Allow Authenticator App access to the Camera



Registration > Two-Factor Authentication

Scan the QR Code

Enter the 6-Digit Authentication Code

Return to the Concur Login screen and...

Scan the QR code with the Authenticator App and...

< Sign In

01038676@toastmasters.org

Set Up Two-Factor Authentication

Step 1: Download or open an authenticator app (such as Microsoft Authenticator, Google Authenticator or your company's preferred authenticator app).

Step 2: In the authenticator app, add SAP Concur by scanning the QR code below or by entering the manual setup key.



[Show manual setup key](#)

Step 3: Enter the 6-digit code shown in the authenticator app.

6-Digit Authentication Code

Sign In

[Need help signing in](#)

< Sign In

01038676@toastmasters.org

Set Up Two-Factor Authentication

Step 1: Download or open an authenticator app (such as Microsoft Authenticator, Google Authenticator or your company's preferred authenticator app).

Step 2: In the authenticator app, add SAP Concur by scanning the QR code below or by entering the manual setup key.



[Show manual setup key](#)

Step 3: Enter the 6-digit code shown in the authenticator app.

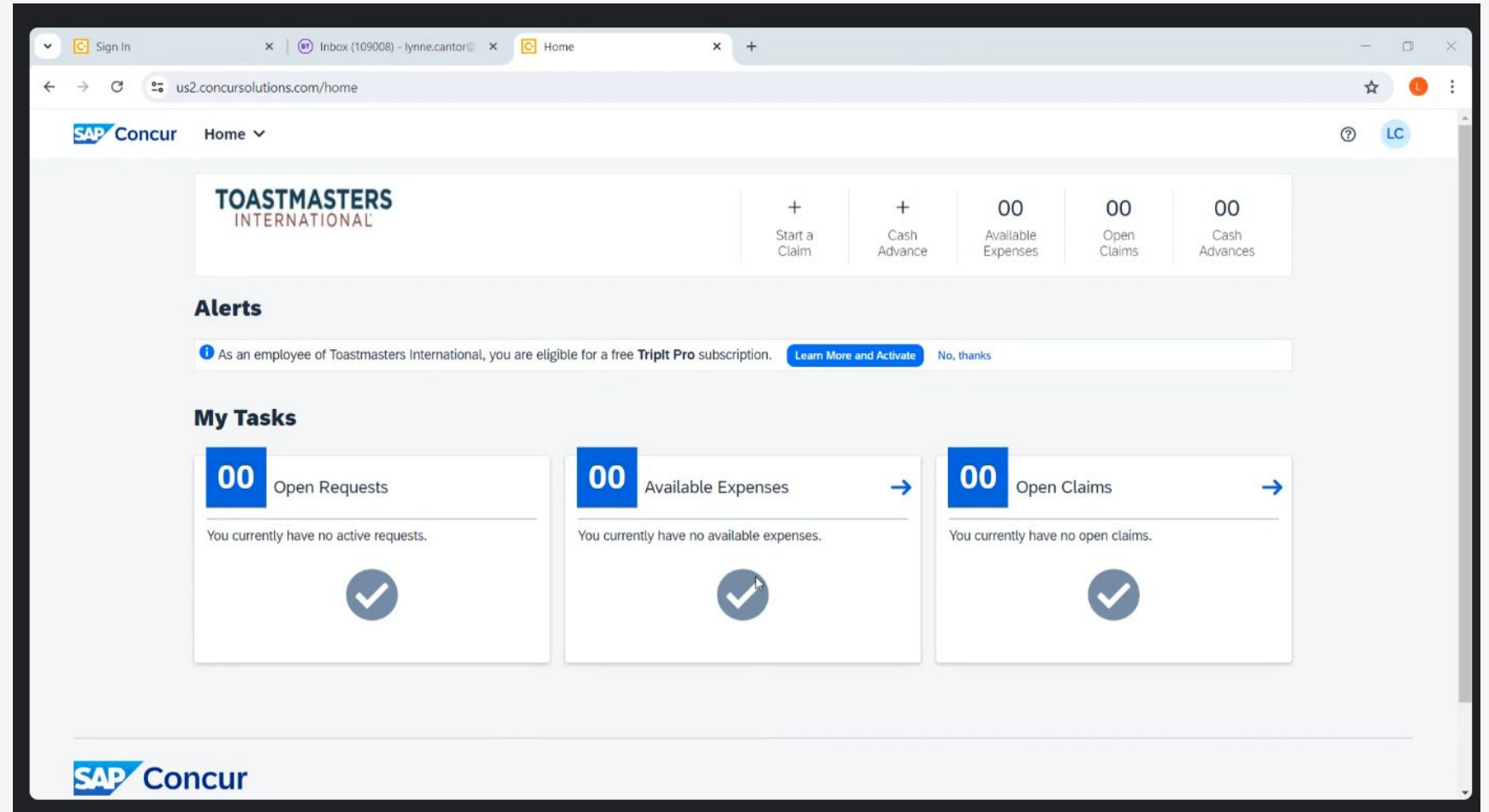
6-Digit Authentication Code

Sign In

[Need help signing in](#)

Registration > 1st Login Success

The following landing page is displayed upon successful 1st Login



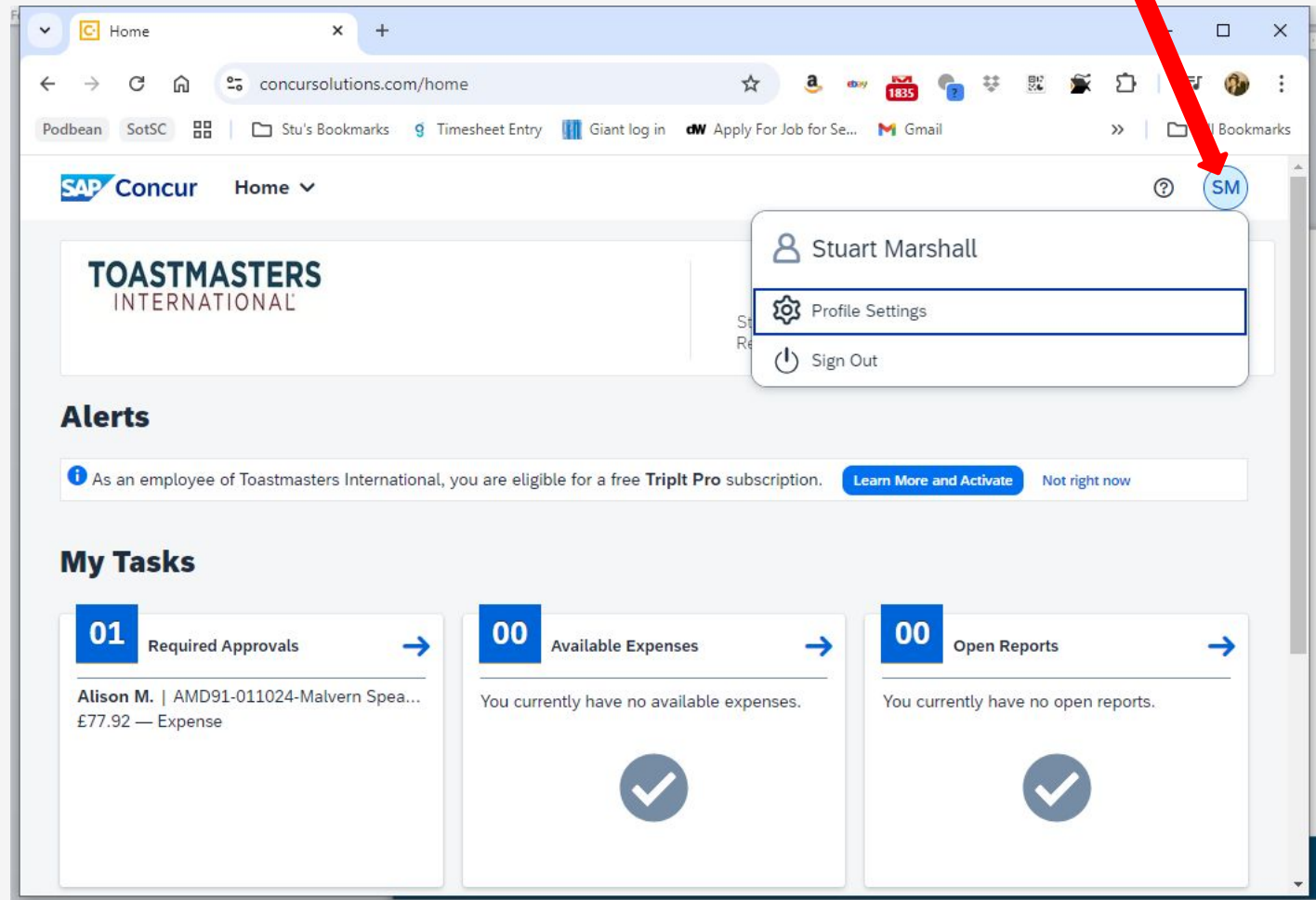
Completing Your User Profile

Completing User Profile

When you **first login**, complete your user profile by completing the following details:

- **Your Personal Information:** [Title](#)
- **Expense Settings:** [Bank Information](#)
- **Other Settings:** [Language & Date/Time Format](#)

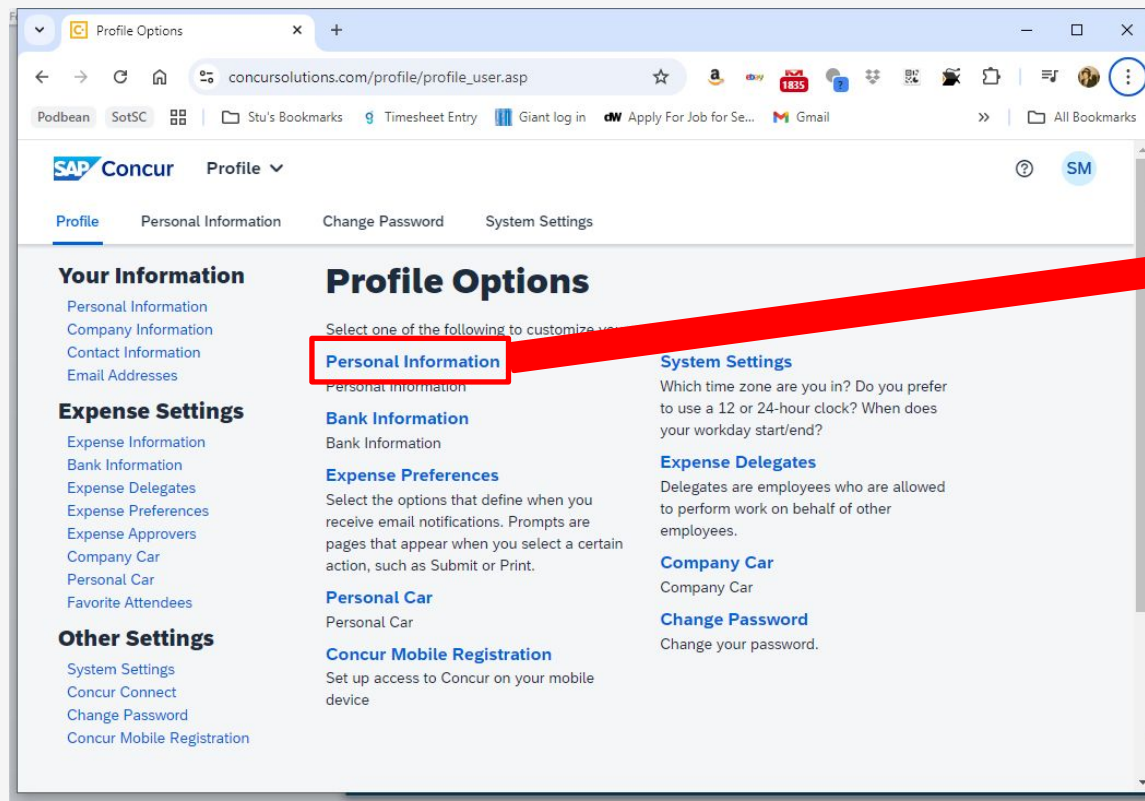
Click on Initials (i.e. 'SM') & then 'Profile Settings'



Completing User Profile

Complete Your Personal Information: Name & Contact Details

Enter your Title.



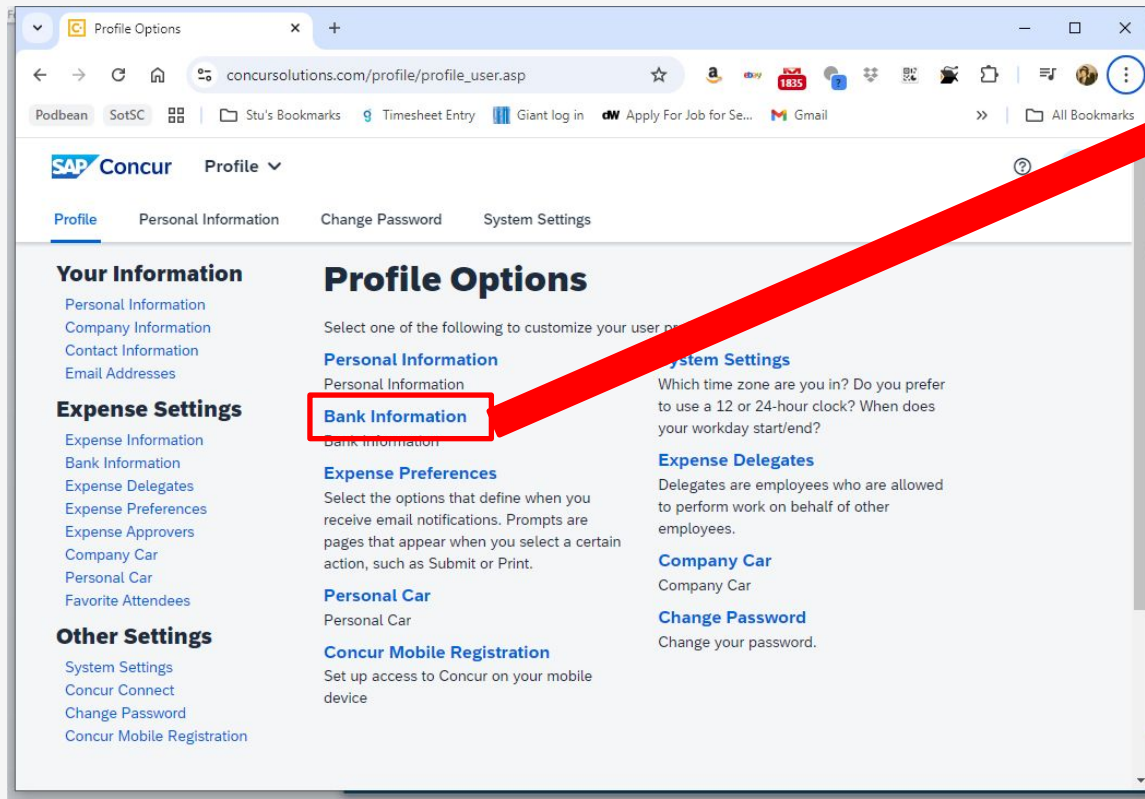
This screenshot shows the 'My Profile - Personal Information' page in SAP Concur. The page has a header with the SAP Concur logo and a 'Profile' dropdown menu. Below the header, there are tabs for 'Profile', 'Personal Information', 'Change Password', and 'System Settings'. The 'Personal Information' tab is selected. The main content area is titled 'My Profile - Personal Information' and includes a warning message: 'Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator. Fields marked [Required] and [Required**] (validated and required) must be completed to save your profile.' The 'Title' field is highlighted with a red box and contains the value 'Mr'. Other fields include 'First Name' (Stuart), 'Middle Name' (empty), 'Preferred Name' (Stuart), 'Last Name' (Marshall), and 'Suffix' (empty). Below this is the 'Company Information' section with an 'Employee ID' field (67625898) and a 'Save' button. The 'Contact Information' section includes a 'Mobile Phone Country/Region' dropdown and a 'Mobile Phone' text field, with a 'Save' button below it.

Completing User Profile

Complete Expense Settings: Bank Information

Complete all Bank Details

Note: these are the details that will be used in order to reimburse you for expense claims



The screenshot shows the SAP Concur 'Profile Options' page. On the left sidebar, under 'Expense Settings', the 'Bank Information' link is highlighted with a red box. A red arrow points from this link to the 'Bank Information' form on the right. The main content area shows 'Profile Options' with various settings like Personal Information, System Settings, Expense Delegates, etc.

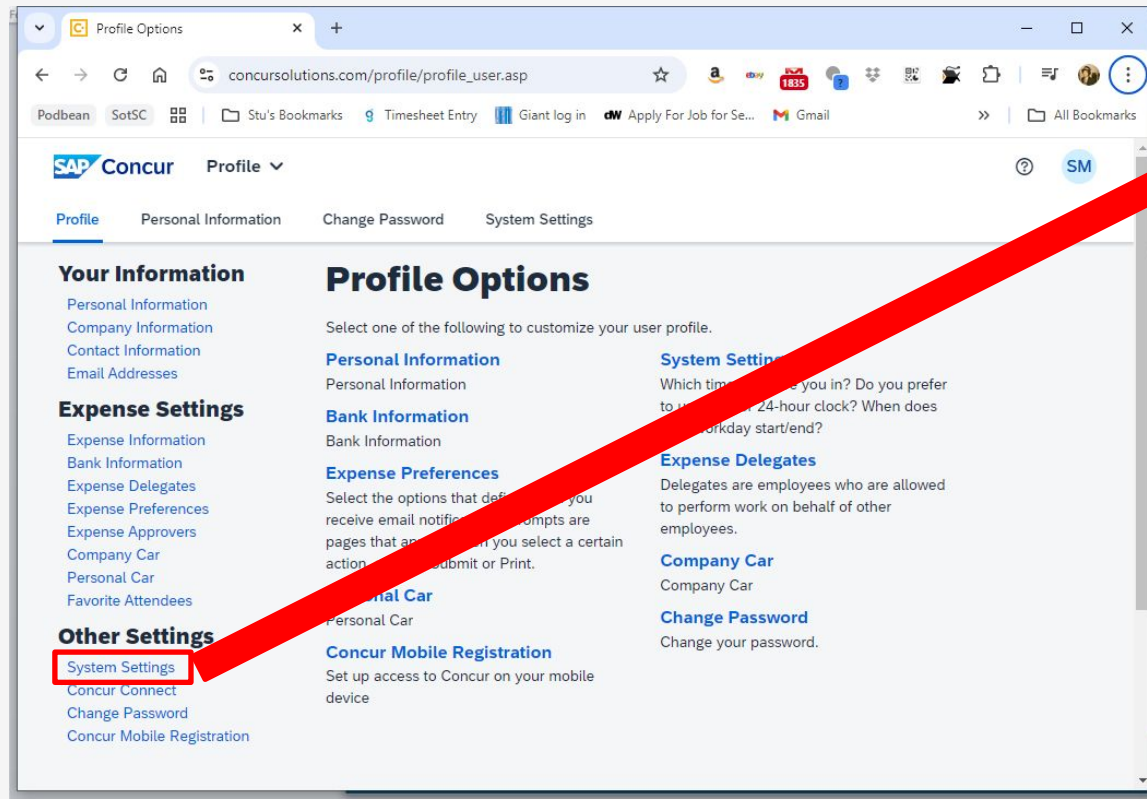
Bank Information

Bank Country/Region UNITED KINGDOM	Bank Currency UK, Pound Sterling	
Sort Code [Redacted]	Account Number [Redacted]	
Bank Name [Redacted]	Branch Location [Redacted]	Status Confirmed
Active [Redacted]		
Full Legal Name of Account Owner Valerija Slavina	Building Number and Road [Redacted]	Building Name [Redacted]
Town [Redacted]	Locality [Redacted]	Postal Code [Redacted]

[Save](#) ☒ I authorize the use requirement below

Completing User Profile

Other (System) Settings: Language & Date/Time Format



Update Language & Date/Time Format

System Settings

Regional Settings and Language

Default Language English (United Kingdom) ▼

Number Format 1,000.00 ▼

Placement of Currency Symbol Before the amount ▼

Negative Number Format -100 ▼

Negative Currency Format -100 ▼

Date Format dd/mm/yyyy ▼

Time Format H:mm ▼

Hour/Minute Separator : 22/06/2023 18:46

Time zone (local time) (UTC) Dublin, Edinburgh, Lisbon, London ▼

Save

Reset

Cancel

Calendar Settings

Start week on Monday ▼

Start Day View At 8:00 ▼

End Day View At 20:00 ▼

Default View month ▼

Other Preferences

Rows per page 25 ▼

Login

Login

Standard Login

Concur Username =

memberID@toastmasters.org

Member ID must be 8 digits.

For example:

12345678@toastmasters.org

If your Member ID is only 7 digits, then add a leading '0'.

For example:

01234567@toastmasters.org

Go to www.concursolutions.com

Sign in to Concur | Concur Solutions

concursolutions.c...

Podbean SotSC Stu's Bookmarks Timesheet Entry Giant log in All Bookmarks

SAP Concur English (US)

Sign In

Username, verified email address, or SSO code

67625898@toastmasters.org

Next

☐ Remember me

[Forgot username](#)

[Need help signing in](#)

[Learn about SAP Concur for your business](#)

SAP Concur

Select 'SAP Concur Password'

Sign in to Concur | Concur Solutions

concursolutions.c...

Podbean SotSC Stu's Bookmarks Timesheet Entry Giant log in All Bookmarks

SAP Concur English (US)

< Sign In

67625898@toastmasters.org

Sign in with:

SAP Concur Password

OR

[Sign in with an email link](#)

[Learn about SAP Concur for your business](#)

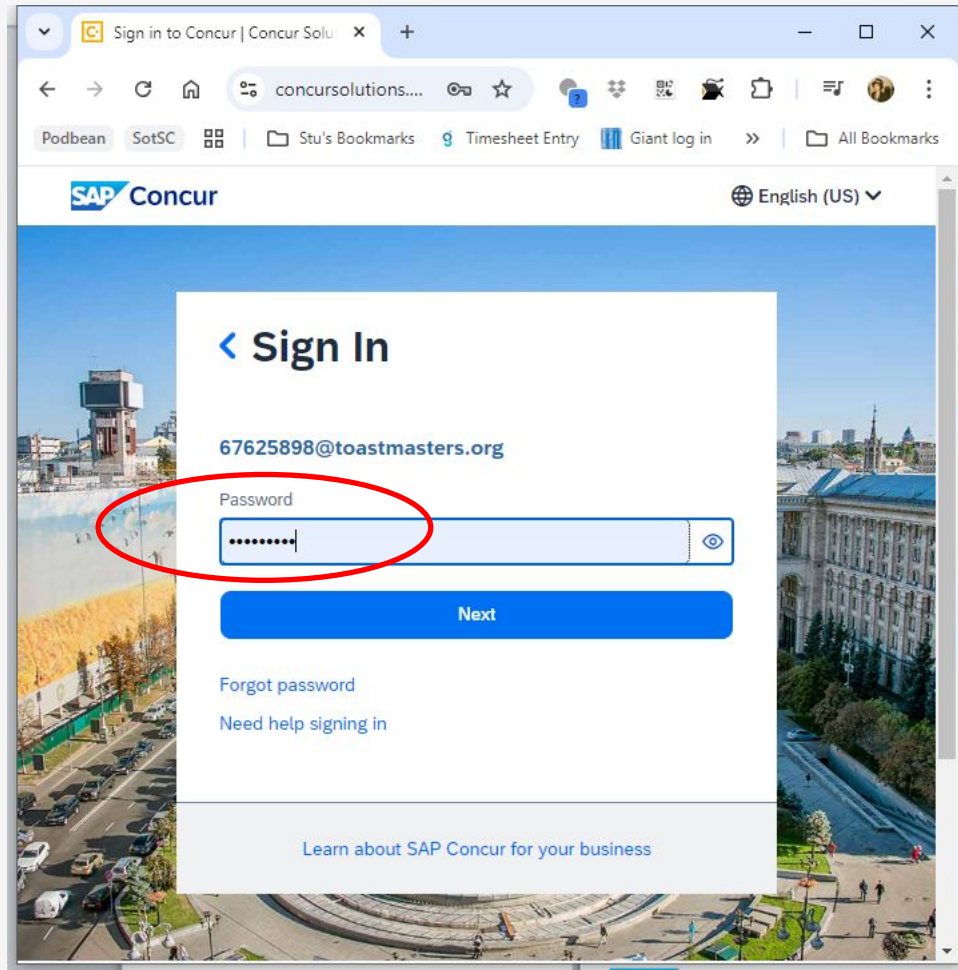
SAP Concur

[Service Status \(North America\)](#)

[Cookie Preferences](#)

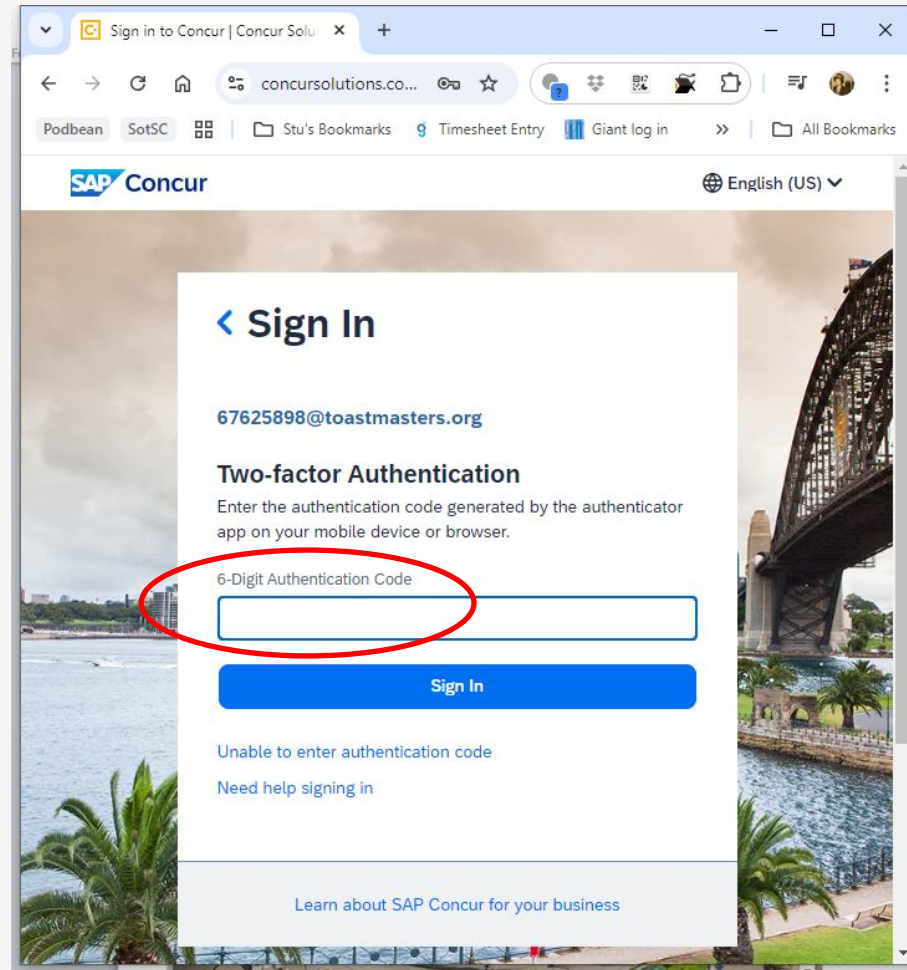
Login

Enter Your Password



The screenshot shows the SAP Concur login interface. The user is logged in as 67625898@toastmasters.org. The password field is highlighted with a red circle. Below the password field is a blue "Next" button. There are links for "Forgot password" and "Need help signing in". At the bottom, there is a link to "Learn about SAP Concur for your business".

Two-Factor Authentication – enter the authentication code



The screenshot shows the SAP Concur login interface after the password step. The user is logged in as 67625898@toastmasters.org. The "Two-factor Authentication" section is highlighted with a red circle. It prompts the user to "Enter the authentication code generated by the authenticator app on your mobile device or browser." Below this is a text input field for the "6-Digit Authentication Code". There is a blue "Sign In" button. There are links for "Unable to enter authentication code" and "Need help signing in". At the bottom, there is a link to "Learn about SAP Concur for your business".

Open the Authenticator app & enter the authenticator code displayed.

How to...

Submit a Mileage Expense Claim

Submitting a Mileage Expense Claim - Overview

High Level Process

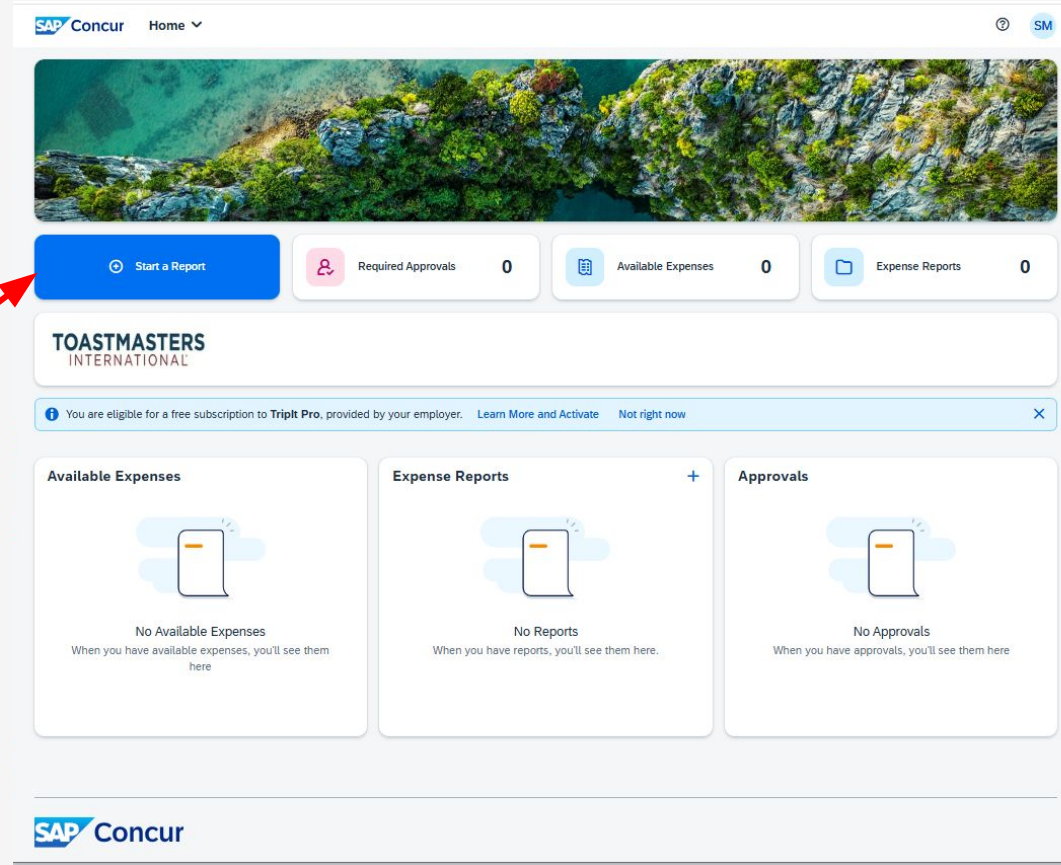
1. Click on **START A REPORT**
2. Next enter a **REPORT NAME** in the following format: **XX-D91-YYYYMM - Description**
Where **XX** = your initials, **YYYY** = Year, **MM** = Month & **Description** = Reason for Expense
*For example: **SM-D91-202407 - Ferndown Club Visit***
3. **ADD EXPENSES** – complete all required fields (including descriptions), upload receipt(s) and save
4. Repeat for all expense lines and, once complete, review & submit

Notes

- All expense claims (Division, Area or Club) must be submitted via Concur
- Claims MUST be submitted **within 30 days** of incurring the expense
- **Expense Approval consists of 3 stages: DFM + DD + WHQ**

Submitting a Mileage Expense Claim: **Step 1**

**Start a NEW
Expense Claim by
clicking on
'+ Start a Report'**



Submitting a Mileage Expense Claim: **Step 2**

Create New Expense Report

Add details and select 'Create Report'.

Details include:

- **Report Name:**
Enter a **Report Name** in the following format:
XX-D91-YYYYMM - Description
Where **XX** = your initials, **YYYY** = Year, **MM** = Month
& **Description** = Reason for Travel

For example: SM-D91-202407 - Travel to Club X

- **Report Date:** the date the expense was incurred
- **Comment:** further details/explanation of the expense (to assist with the approval process)

The screenshot shows the 'Create New Report' form in SAP Concur. The form includes the following fields:

- Report Name ***: A text input field containing 'XX-D91-YYYYMM - Description'.
- Policy**: A dropdown menu showing '*District Expense Policy'.
- Report Date**: A date picker showing '11/23/2024'.
- Comment**: A text area with a character count of '135/500'. It contains the text: 'Add comments/narrative to provide details/background of the expense. For example: For club visits, add the name of the club visited...'.

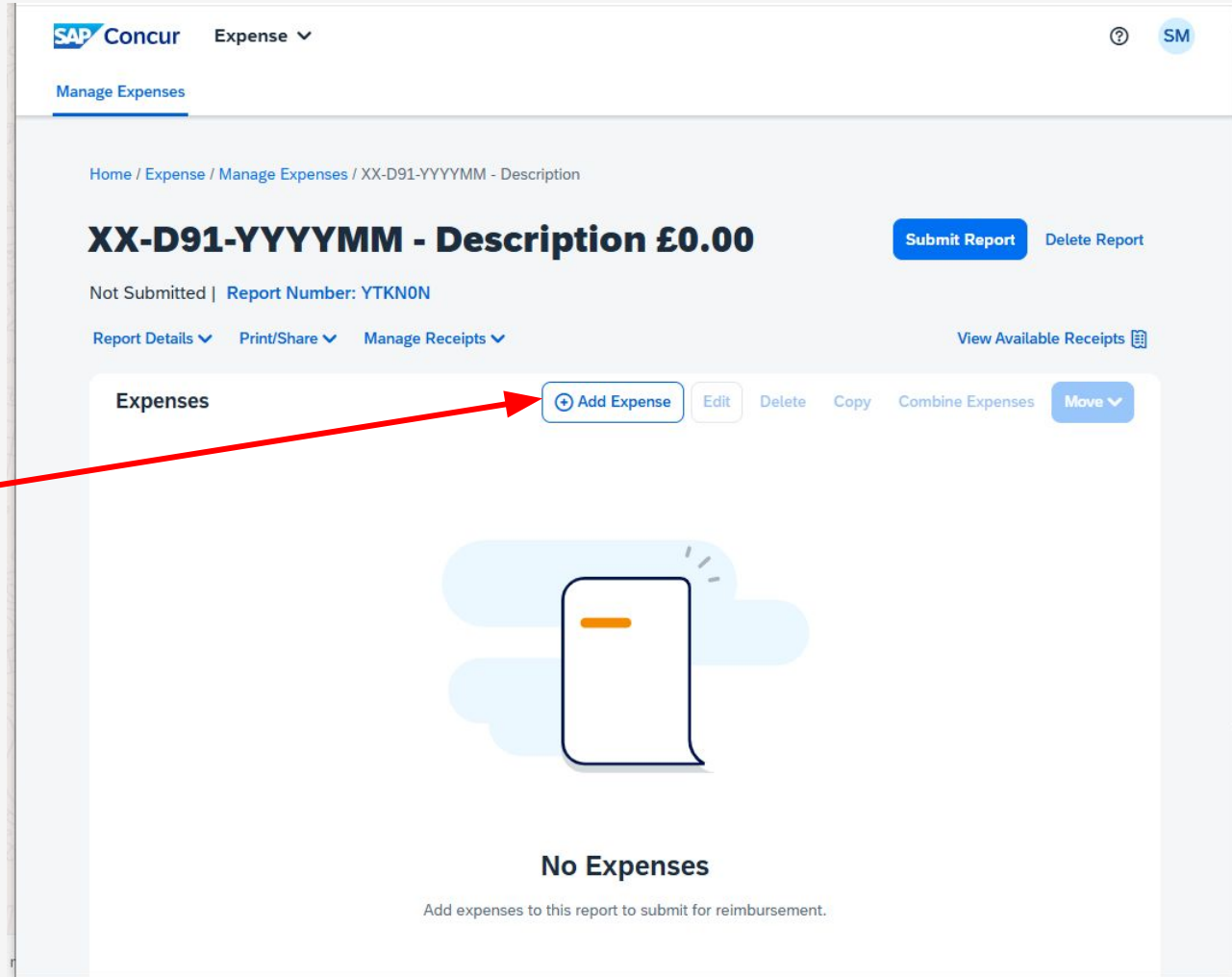
At the bottom right of the form, there are two buttons: 'Cancel' and 'Create Report'. A red arrow points from the 'Add details and select 'Create Report'.' text to the 'Create Report' button.

Note: The Report Name must be entered in the specified format otherwise the claim will be automatically rejected

Submitting a Mileage Expense Claim: **Step 3**

Add Expense(s)

Click 'Add Expense'



Submitting a Mileage Expense Claim: **Step 4**

Add Expense to Report

Select 'New Expense'
and choose the
expense type
'Mileage (7062)'

The screenshot shows the 'Add Expense to Report' dialog box in SAP Concur. At the top, it says 'Available Expenses (0)' and has a 'New Expense' button. Below this is a search bar with the placeholder text 'Search by expense type, category, description'. The main list shows two categories: '01. Travel' and '02. Other'. Under '01. Travel', there are several options: 'Airfare (7060)', 'Convention Registration Fees (7056)', 'Food (7078)', 'Lodging (7058)', 'Mileage (7062)', 'Other (7068)', 'Rail (7066)', and 'Taxis/Shuttle (7064)'. The 'Mileage (7062)' option is highlighted with a red box. Under '02. Other', there is one option: 'Advertising (7036)'. At the bottom right, there is a 'Cancel' button. A red arrow points from the 'New Expense' button to the 'Mileage (7062)' option.

Submitting a Mileage Expense Claim: Step 5

Fill in the 'New Expense' details, with reference to the guide below:

Field	Required Contents (Grey indicates default value)
Expense Type	Mileage (7062)
Transaction Date	Date of Travel
Business Purpose	Reason for travel, i.e. "Travel to Club X"
Enter Vendor Name	Not required
City of Purchase	Home Town
Payment Type	Cash/Out of Pocket
Amount	Claim value = Number of Miles x Rate/Mile* Note: 'Number of Miles' should reflect the figure captured in the field below
Currency	UK, Pound Sterling (GBP)
From Location	Location of journey start...
To Location	Location of journey end...
Number of Miles	Total return journey length. Note: The Number of Miles must match the trip length on the attached map
Reporting Code	(9XX) Travel - Your Role For example: Division Directors select '(957) Travel - Division Director'
Event Period	N/A
District	(D91) District 91
Subsidiary	(XXX) Level of Role For example: Division Directors select '(091D) Division'
VAT Number	Not required
Fuel Receipt Date	Not required
Fuel Receipt Type	Not required
Comment	Additional narrative on reason for journey

New Expense

Details Itemizations

* Required field

Expense Type *
Mileage (7062) X

Transaction Date *
11/23/2024

Business Purpose *
Travel to Ferndown Speakers

Enter Vendor Name
City of Purchase *
Bournemouth, Dorset X

Payment Type *
Cash/Out of Pocket

Amount *
Currency *
UK, Pound Sterling (GBP) X

From Location
BH1 3PQ

To Location
Ferndown Village Hall

Number of Miles *
15

Reporting Code *
(954) Travel - District - Finance Manager X

Event Period *
N/A X

District
(091) District 91

Subsidiary *
District X

VAT Number

Fuel Receipt Date
MM/DD/YYYY

Fuel Receipt Type
None Selected

Comment
Travel to Ferndown Speakers to deliver an Award.

Save Expense Save and Add Another Cancel

Save Expense Cancel

Hide Receipt

Attach Receipt X

Available Receipts (0)

Attach an available receipt to the expense by selecting "Attach". Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.

Upload New Receipt

You have no available receipts

2025-26
*Mileage Rate
45p
per mile

Submitting a Mileage Expense Claim: Step 6

Attach Receipt

Mileage expense claims 'receipts' are required and take the form of a map of the journey (i.e. from Google maps)

New Expense

Step 6.1: Select 'Upload New Receipt'

Details | Itinerations

Expense Type *
Mileage (7062) X

Transaction Date *
11/23/2024

Business Purpose *
Travel to Ferndown Speakers

Enter Vendor Name
City of Purchase *
Bournemouth, Dorset X

Payment Type *
Cash/Out of Pocket

Amount *
6.75

Currency *
UK, Pound Sterling (GBP) X

From Location
BH1 3PQ

To Location
Ferndown Village Hall

Number of Miles *
15

Reporting Code *
(954) Travel - District - Finance Manager X

Event Period *
N/A X

District
(091) District 91

Subsidiary *
District X

VAT Number

Fuel Receipt Date
MM/DD/YYYY

Fuel Receipt Type
None Selected

Comment
Travel to Ferndown Speakers to deliver an Award. 48/500

Save Expense Save and Add Another Cancel

Attach Receipt

Available Receipts (0)

Attach an available receipt to the expense by selecting "Attach". Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.

Upload New Receipt

You have no available receipts

Step 6.2: Navigate to the relevant 'attachment' (i.e. map of journey) and select.

New Expense

Details | Itinerations

Expense Type *
Mileage (7062) X

Transaction Date *
11/23/2024

Business Purpose *
Travel to Ferndown Speakers

Enter Vendor Name
City of Purchase *
Bournemouth, Dorset X

Payment Type *
Cash/Out of Pocket

Amount *
6.75

Currency *
UK, Pound Sterling (GBP) X

From Location
BH1 3PQ

To Location
Ferndown Village Hall

Number of Miles *
15

Reporting Code *
(954) Travel - District - Finance Manager X

Event Period *
N/A X

District
(091) District 91

Subsidiary *
District X

VAT Number

Fuel Receipt Date
MM/DD/YYYY

Fuel Receipt Type
None Selected

Comment
Travel to Ferndown Speakers to deliver an Award. 48/500

Save Expense Save and Add Another Cancel

Receipt

via New BSA347
30 min
12.2 miles

Woodford Road, Bournemouth BH1
3PQ to Ferndown Village Hall -
Google Maps.pdf

Remove

Step 6.3: Save Expense

Submitting a Mileage Expense Claim: Step 7

Do you have more than one journey (mileage expense) to claim?

YES! Then add additional expense lines (by repeating steps 3 to 6) for each additional journey.

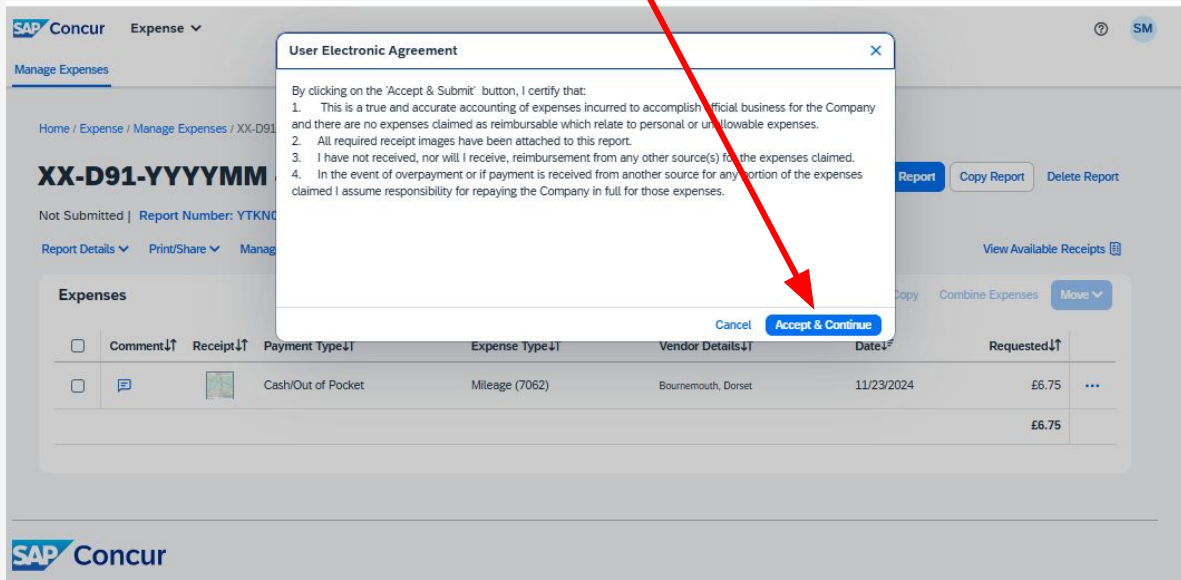
NO! Then you are ready to 'Submit the Report' for approval (and move on to step 8).

The screenshot shows the SAP Concur 'Manage Expenses' interface. At the top, the breadcrumb trail is 'Home / Expense / Manage Expenses / XX-D91-YYYYMM - Description'. The main heading is 'XX-D91-YYYYMM - Description £6.75'. Below this, it says 'Not Submitted | Report Number: YTKN0N'. There are three buttons: 'Submit Report' (highlighted with a red arrow), 'Copy Report', and 'Delete Report'. Below these are links for 'Report Details', 'Print/Share', and 'Manage Receipts'. A 'View Available Receipts' link is also present. The 'Expenses' table has columns: Comment, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. The table contains one row for a mileage expense: 'Cash/Out of Pocket', 'Mileage (7062)', 'Bournemouth, Dorset', '11/23/2024', and '£6.75'. At the bottom, there are links for 'Service Status (US2)', 'Contact Support', 'Cookie Preferences', and 'Cookie Statement'. The footer shows 'Last signed in: 11/23/2024 09:14 am' and '© Copyright 2024 - SAP Concur - All Rights Reserved'.

Submitting a Mileage Expense Claim: Step 8

User Agreement Acceptance & Final Submission

Step 8.1: Select 'Accept & Continue'



The screenshot shows the SAP Concur interface with a 'User Electronic Agreement' dialog box open. A red arrow points from the 'Accept & Continue' button in the dialog to the 'Accept & Continue' button in the background interface.

User Electronic Agreement

By clicking on the 'Accept & Submit' button, I certify that:

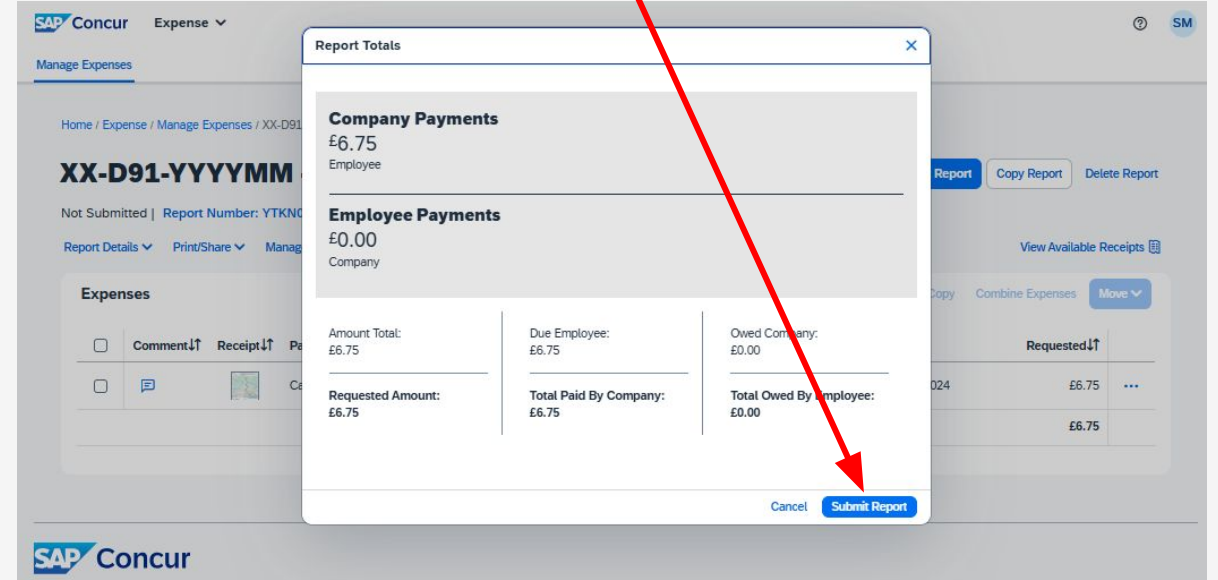
1. This is a true and accurate accounting of expenses incurred to accomplish official business for the Company and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the Company in full for those expenses.

Buttons: Cancel, **Accept & Continue**

Expenses Table:

	Comment	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
☐			Cash/Out of Pocket	Mileage (7062)	Bournemouth, Dorset	11/23/2024	£6.75
							£6.75

Step 8.2: Select 'Submit Report'



The screenshot shows the SAP Concur interface with a 'Report Totals' dialog box open. A red arrow points from the 'Submit Report' button in the dialog to the 'Submit Report' button in the background interface.

Report Totals

Company Payments
£6.75
Employee

Employee Payments
£0.00
Company

Amount Total: £6.75

Due Employee: £6.75

Owed Company: £0.00

Requested Amount: £6.75

Total Paid By Company: £6.75

Total Owed By Employee: £0.00

Buttons: Cancel, **Submit Report**

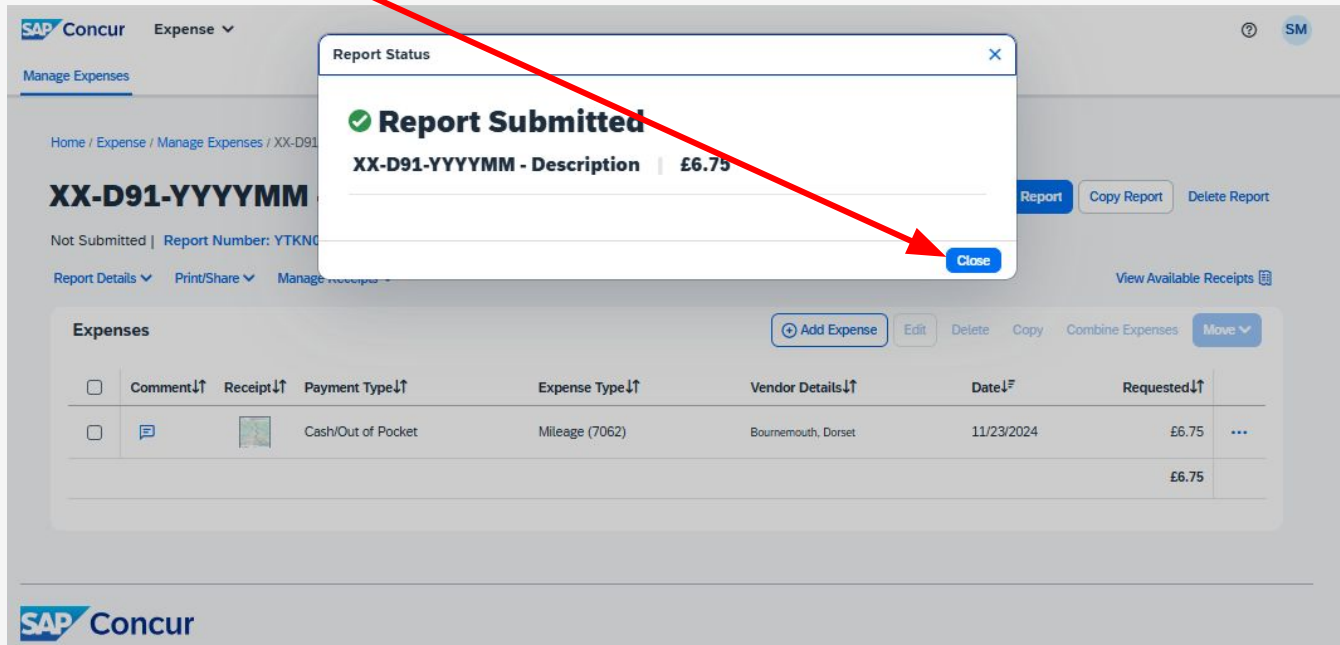
Expenses Table:

	Comment	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
☐			Cash/Out of Pocket	Mileage (7062)	Bournemouth, Dorset	11/23/2024	£6.75
							£6.75

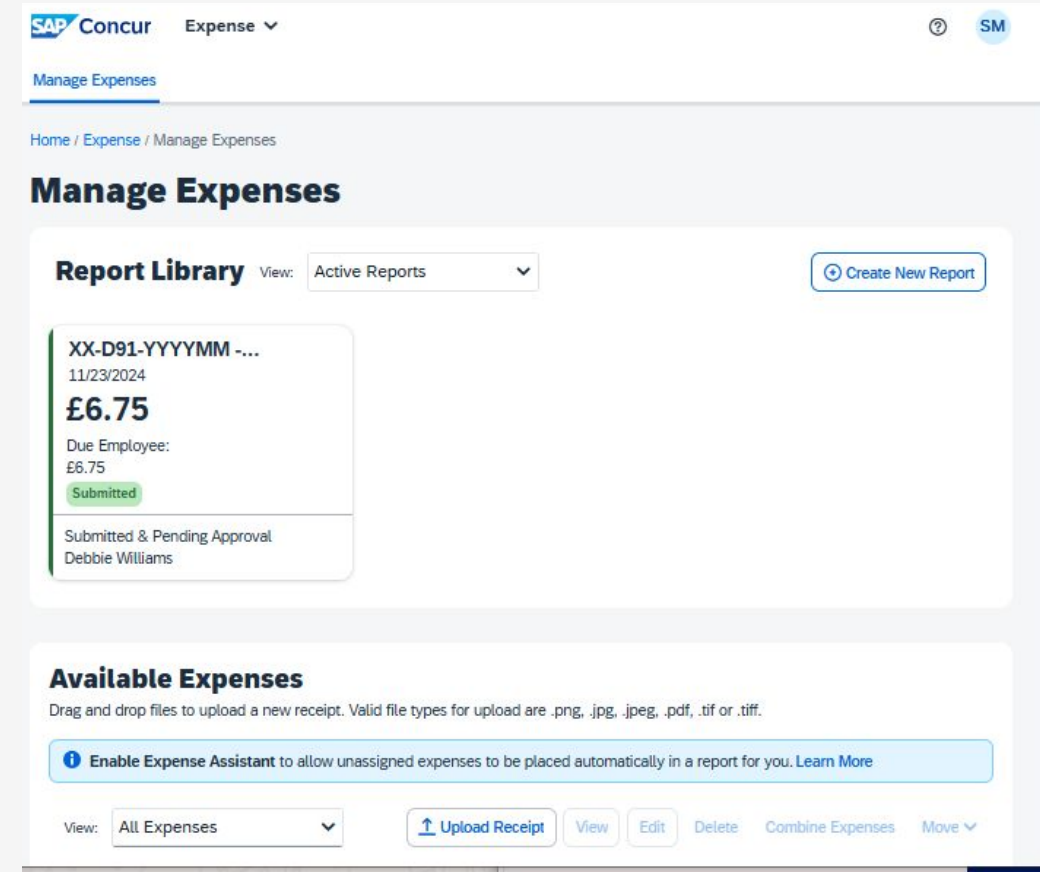
Submitting a Mileage Expense Claim: Step 9

Report Submitted confirmation

Your mileage expense claim has now been successfully submitted!
Select 'Close' to return to the 'Manage Expenses' section.



Note: The Manage Expenses section can be used to view all of your active reports and view their status.



Section

7.7

How to...

Submit a District Incentive claim

Submitting a Claim for a District Incentive - Overview

High Level Process

1. Click on **START A REPORT**
2. Next enter a **REPORT NAME** in the following format: **XX-D91-YYYYMM-Incentive-Incentive Abbreviation**
Where **XX** = your initials, **YYYY** = Year, **MM** = Month & **Incentive Abbreviation** is as per the summary on page 61
For example - a 'Great Golden Quarter' claim Report Name = SM-D91-202411-Incentive-GGQ
3. **ADD EXPENSE**
 - Complete all required fields (including descriptions)
 - Upload/attach both (i) the Incentive Voucher AND (ii) the receipt/invoice for the expense you are claiming against

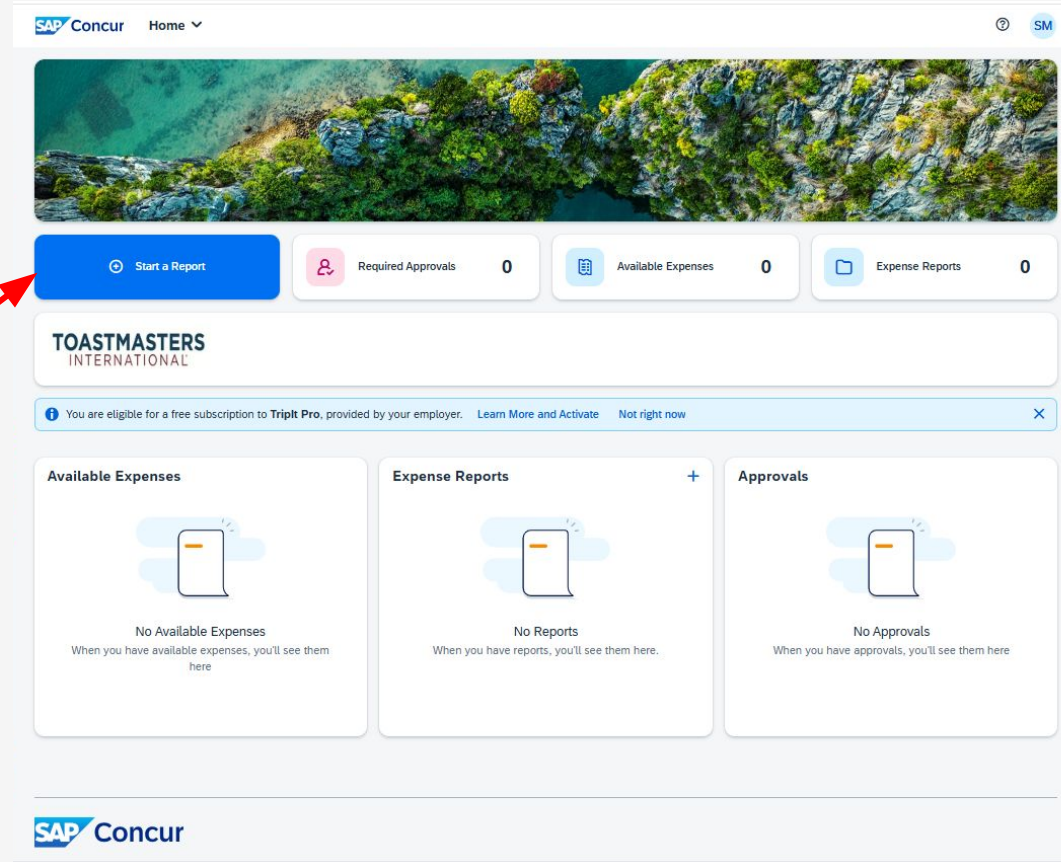
Note: This receipt/invoice must have a value equal or greater to the value of the incentive awarded (assuming the club intends to claim the full value)

Notes

- All District Incentive claims must be submitted via Concur
- Claims MUST be submitted **prior to the expiry date** (as stated on the PDF Incentive Voucher)
- **Expense Approval consists of 3 stages:** DFM + DD + **WHQ**

Submitting a Claim for a District Incentive: **Step 1**

**Start a NEW District Incentive Claim by clicking on
'+ Start a Report'**



Submitting a Claim for a District Incentive: Step 2

Create New Expense Report

Add details and select 'Create Report'.

Details include:

- **Report Name:**
Enter a **Report Name** in the following format:
XX-D91-YYYYMM-Incentive-Incentive Abbreviation
Where **XX** = your initials, **YYYY** = Year, **MM** = Month &
Incentive Abbreviation is as per the summary on page 61

For example: SM-D91-202411-Incentive-GGQ

- **Report Date:** the date the claim is being submitted
- **Comment:** Club Name & Incentive details

The screenshot shows the 'Create New Report' form in SAP Concur. The form has the following fields:

- Report Name ***: SM-D91-202411-Incentive-GGQ
- Policy**: *District Expense Policy
- Report Date**: 11/23/2024
- Comment**: Hallmark Speakers - Great Golden Quarter Incentive

At the bottom right of the form, there are two buttons: 'Cancel' and 'Create Report'. A red arrow points from the 'Create Report' button in the screenshot to the 'Create Report' button in the instructions.

Note: The Report Name must be entered in the specified format as outlined on this page otherwise the claim will be automatically rejected

Submitting a Claim for a District Incentive: **Step 3**

Add Incentive Claim ('Expense')

Click 'Add Expense'

The screenshot displays the SAP Concur 'Expense' management interface. At the top, the header shows 'SAP Concur Expense' and a 'Manage Expenses' link. Below this, a breadcrumb trail reads 'Home / Expense / Manage Expenses / SM-D91-202411-Incentive-GGQ'. The main section features the report title 'SM-D91-202411-Incentive-GGQ £0.00' and a 'Submit Report' button. Below the title, it indicates 'Not Submitted' and provides the 'Report Number: 9A9K37'. A row of links includes 'Report Details', 'Print/Share', 'Manage Receipts', and 'View Available Receipts'. The central area is titled 'Expenses' and contains a toolbar with buttons: 'Add Expense' (highlighted with a red arrow), 'Edit', 'Delete', 'Copy', 'Combine Expenses', and 'Move'. Below the toolbar is a large graphic of a smartphone with a blue notification bubble, and the text 'No Expenses' followed by the instruction 'Add expenses to this report to submit for reimbursement.' The footer of the interface shows the 'SAP Concur' logo.

Submitting a Claim for a District Incentive: **Step 4**

Add Incentive Claim ('Expense') to Report

**Select 'New Expense'
and choose the
expense type
'Incentives (7082)'**

The screenshot shows the 'Add Expense to Report' window in SAP Concur. At the top, it says 'Expense' with a dropdown arrow. Below that, 'Available Expenses (0)' is followed by a blue button labeled 'New Expense'. A red arrow points from this button to the 'Incentives (7082)' option in a list of expense types. The list includes: Educational Materials (7006), Equipment Purchase (Less than \$500) (7048), Equipment Rental (7090), Express Mail/Courier (7046), Gifts & Thank Yous (7080), Incentives (7082) (highlighted with a red box), Maintenance & Repairs (7052), Meal Events (7016), Newsletter (7024), Outside Contractor (7042), Personal Expense - Due to District (3710-000000), Photocopying (7030), Postage & Shipping (7044), Printing (7020), Promotional Materials (7008), and Reimbursements - Registration & Tickets (6060). A search bar is at the top of the list, and a 'Collapse All Sections' link is on the right. A 'Cancel' button is at the bottom right.

Submitting a Claim for a District Incentive: Step 5

Fill in the 'New Expense' details, with reference to the guide below:

Field	Required Contents (Grey indicates default value)
Expense Type	Incentives (7082)
Transaction Date	Date the claim is submitted
Business Purpose	Incentive Name Note: Refer to the Incentive Summary table for the relevant Incentive Name.
Enter Vendor Name	Not required
City of Purchase	Not required
Payment Type	Cash/Out of Pocket
Amount	Incentive value Note: The full incentive value can only be claimed if the receipt value is equal or greater than the incentive value.
Currency	UK, Pound Sterling (GBP)
Reporting Code	Relevant Reporting Code for Incentive Note: Refer to the Incentive Summary table for the relevant Reporting Code.
Event Period	N/A
District	(D91) District 91
Subsidiary	District
Comment	Club Name & Incentive Name

Note: The Business Purpose & Reporting Code must be entered as listed on page 65 otherwise the claim will be automatically rejected

SAP Concur Expense Manage Expenses

Home / Expense / Manage Expenses / SM-D91-202411-Incentive-GGQ / New Expense

New Expense

Save Expense Cancel

Hide Receipt

Details Itemizations

Expense Type *
Incentives (7082)

Transaction Date *
11/23/2024

Enter Vendor Name

Payment Type *
Cash/Out of Pocket

Amount *
40.00

Reporting Code *
(583) Club Growth - Membership ...

District
(091) District 91

Comment
Hallmark Speakers - The Great Golden Quarter 100%

Business Purpose *
The Great Golden Quarter 100%

City of Purchase

Currency *
UK, Pound Sterling (GBP)

Event Period *
N/A

Subsidiary *
District

Save Expense Save and Add Another Cancel

Receipt

Click to upload or drag and drop files to upload a new receipt.
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
5MB limit per file.

Add Receipt

Concur claim details for District Incentives

2025-26 District Incentives Summary - Business Purpose & Reporting Code

Please ensure the relevant BUSINESS PURPOSE & REPORTING CODE is used for all District Incentive claims, as per the table below:

INCENTIVE = AWARD NAME	REWARD	REPORTING CODE
Smedley	Award ribbon. 25 clubs in the draw will get £25*	(582) Club Growth - Membership Growth
Talk up Toastmasters	Award ribbon. 25 clubs in the draw will get £25*	(582) Club Growth - Membership Growth
Beat the Clock	Award ribbon. 25 clubs in the draw will get £25*	(582) Club Growth - Membership Growth
100% Early Renewals - September	First 25 Clubs will get £40*	(583) Club Growth - Membership Retention
100% Early Renewals - March	First 25 Clubs will get £40*	(583) Club Growth - Membership Retention
Get to 20	20 clubs in the draw will get £100*	(582) Club Growth - Membership Growth
Club Banner	£100 for New Clubs Chartering by 30th June 2026	(580) Club Growth - Building New Clubs
Sponsor A Club	Outstanding Member Pin	N/A
Triple Crown	Triple Crown Pin	N/A
Distinguished Toastmaster (DTM)	DTM Pin	N/A
7/7 Club Officers Trained	Club Officer Pins	N/A
Outstanding Member Recognition	Outstanding Member Pin	N/A
Pathways Pioneers	£40 https://d91toastmasters.org.uk/incentives-leaderboard/	(571) Recognition - Club
Leadership Innovators	£40 https://d91toastmasters.org.uk/incentives-leaderboard/	(571) Recognition - Club
Excellence Champions	£40 https://d91toastmasters.org.uk/incentives-leaderboard/	(571) Recognition - Club

*Monetary awards can go towards room hire, zoom licence or TM store only within 30 days of announcement

Submitting a Claim for a District Incentive: Step 6

Attach Receipts

Note: District Incentives require 2 'receipts' to be attached (*otherwise the claim will be immediately rejected*):

(i) The incentive voucher and (ii) the receipt/invoice for the expense being claimed against.

Step 6.1: Select 'Add Receipt'

Home / Expense / Manage Expenses / SM-D91-202411-Incentive-GGQ / New Expense

New Expense

Save Expense Cancel

Hide Receipt

Details Itemizations

Expense Type * Required field
Incentives (7082) X

Transaction Date * 11/23/2024 Business Purpose * The Great Golden Quarter 100%

Enter Vendor Name City of Purchase

Payment Type * Cash/Out of Pocket

Amount * 40.00 Currency * UK, Pound Sterling (GBP) X

Reporting Code * (583) Club Growth - Membership ... X Event Period * N/A X

District (091) District 91 Subsidiary * District X

Comment 49/500
Hallmark Speakers - The Great Golden Quarter 100%

Save Expense Save and Add Another Cancel

Receipt

Click to upload or drag and drop files to upload a new receipt.
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
5MB limit per file.

Add Receipt

Step 6.2: Select 'Upload New Receipt'

Home / Expense / Manage Expenses / SM-D91-202411-Incentive-GGQ / New Expense

New Expense

Save Expense Cancel

Hide Receipt

Details Itemizations

Expense Type * Required field
Incentives (7082) X

Transaction Date * 11/23/2024 Business Purpose * The Great Golden Quarter 100%

Enter Vendor Name City of Purchase

Payment Type * Cash/Out of Pocket

Amount * 40.00 Currency * UK, Pound Sterling (GBP) X

Reporting Code * (583) Club Growth - Membership ... X Event Period * N/A X

District (091) District 91 Subsidiary * District X

Comment 49/500
Hallmark Speakers - The Great Golden Quarter 100%

Save Expense Save and Add Another Cancel

Attach Receipt X

Available Receipts (0)
Attach an available receipt to the expense by selecting "Attach". Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.

Upload New Receipt

You have no available receipts

Submitting a Claim for a District Incentive: Step 6

Attach Receipts

Note: District Incentives require 2 'receipts' to be attached (*otherwise the claim will be immediately rejected*):
(i) The incentive voucher and (ii) the receipt/invoice for the expense being claimed against.

Step 6.3: Attach Receipt #1

Navigate to the relevant 'attachment' (i.e. Incentive Voucher) and select.

New Expense

Details | Itemizations

* Required field

Expense Type *
Incentives (7082) X v

Transaction Date *
11/23/2024

Business Purpose *
The Great Golden Quarter 100%

Enter Vendor Name
City of Purchase

Payment Type *
Cash/Out of Pocket v

Amount *
40.00

Currency *
UK, Pound Sterling (GBP) X v

Reporting Code *
(583) Club Growth - Membershi... X v

Event Period *
N/A X v

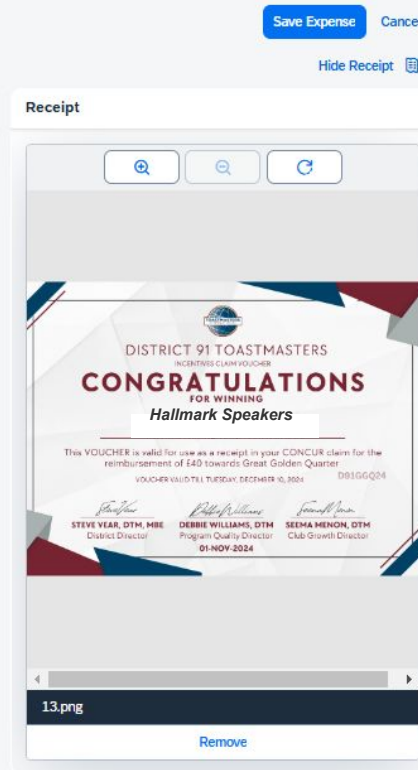
District
(091) District 91

Subsidiary *
District X v

Comment
Hallmark Speakers - The Great Golden Quarter 100%

49/500

Save Expense Save and Add Another Cancel



Step 6.4: Save Expense

Submitting a Claim for a District Incentive: Step 6

Edit Expense

In order to attach Receipt #2

(i.e. the receipt/Invoice that is being claimed for)

The screenshot shows the SAP Concur 'Manage Expenses' interface. At the top, there's a header with 'SAP Concur' and 'Expense' dropdown. Below it, a breadcrumb trail reads 'Home / Expense / Manage Expenses / SM-D91-202411-Incentive-GGQ'. The main title is 'SM-D91-202411-Incentive-GGQ £40.00'. To the right of the title are buttons for 'Submit Report', 'Copy Report', and 'Delete Report'. Below the title, it says 'Not Submitted | Report Number: 9A9K37'. There are also links for 'Report Details', 'Print/Share', 'Manage Receipts', and 'View Available Receipts'. The 'Expenses' table has columns: 'Comment', 'Receipt', 'Payment Type', 'Expense Type', 'Vendor Details', 'Date', and 'Requested'. A red arrow points from the 'Edit' option in the dropdown menu to the text 'Step 6.5: Edit Expense'.

	Comment	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
☐			Cash/Out of Pocket	Incentives (7082)		11/23/2024	£40.00

Step 6.5: Edit Expense

Click on the '...' & select 'Edit'

Submitting a Claim for a District Incentive: Step 6

Attach Receipts

Note: District Incentives require 2 'receipts' to be attached (*otherwise the claim will be immediately rejected*):

(i) The incentive voucher and (ii) the receipt/invoice for the expense being claimed against.

SAP Concur Expense Manage Expenses

Home / Expense / Manage Expenses / SM-D91-202411-Incentive-GGQ / Incentives (7082)

11/23/2024

Incentives (7082) £40.00

Save Expense Delete Expense Cancel

Hide Receipt

Details Itemizations

Expense Type * **Incentives (7082)**

Transaction Date * **11/23/2024** Business Purpose * **The Great Golden Quarter 100%**

Enter Vendor Name City of Purchase

Payment Type * **Cash/Out of Pocket**

Amount * **40.00** Currency * **UK, Pound Sterling (GBP)**

Reporting Code * **(583) Club Growth - Membershi...** Event Period * **N/A**

District **(091) District 91** Subsidiary * **District**

Comment **Hallmark Speakers - The Great Golden Quarter 100%**

Save Expense Save and Add Another Cancel

Receipt

13.png

Remove Add Open

Step 6.6: Add a 2nd Receipt

Step 6.7: Select 'Upload New Receipt'

Home / Expense / Manage Expenses / SM-D91-202411-Incentive-GGQ / New Expense

New Expense

Save Expense Cancel

Hide Receipt

Details Itemizations

Expense Type * **Incentives (7082)**

Transaction Date * **11/23/2024** Business Purpose * **The Great Golden Quarter 100%**

Enter Vendor Name City of Purchase

Payment Type * **Cash/Out of Pocket**

Amount * **40.00** Currency * **UK, Pound Sterling (GBP)**

Reporting Code * **(583) Club Growth - Membership ...** Event Period * **N/A**

District **(091) District 91** Subsidiary * **District**

Comment **Hallmark Speakers - The Great Golden Quarter 100%**

Save Expense Save and Add Another Cancel

Attach Receipt

Available Receipts (0)

Attach an available receipt to the expense by selecting "Attach". Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.

Upload New Receipt

You have no available receipts

Submitting a Claim for a District Incentive: Step 6

Attach Receipts

Note: District Incentives require 2 'receipts' to be attached (*otherwise the claim will be immediately rejected*):
(i) The incentive voucher and (ii) the receipt/invoice for the expense being claimed against.

Step 6.8: Attach Receipt #2

Navigate to the relevant 'attachment' (i.e. the receipt/Invoice that is being claimed for) and select.

Note: The eligible expense types are listed in section 6.1 > District Incentives - Overview & Eligible Expenses (page 19)

Step 6.9: Save Expense

The screenshot shows the 'Incentives (7082) £40.00' form with the following fields:

- Expense Type: Incentives (7082)
- Transaction Date: 11/23/2024
- Business Purpose: The Great Golden Quarter 100%
- Enter Vendor Name: (empty)
- City of Purchase: (empty)
- Payment Type: Cash/Out of Pocket
- Amount: 40.00
- Currency: UK, Pound Sterling (GBP)
- Reporting Code: (583) Club Growth - Membershi...
- Event Period: N/A
- District: (091) District 91
- Subsidiary: District
- Comment: Hallmark Speakers - The Great Golden Quarter 100%

Buttons at the top: Save Expense, Delete Expense, Cancel. Buttons at the bottom: Save Expense, Save and Add Another, Cancel.

On the right, a 'Receipt' upload interface shows a preview of a 'District 91 Toastmasters CONGRATULATIONS FOR WINNING Hallmark Speakers' voucher. Below the preview are buttons: Remove, Add, Open.

* FINAL CHECK *

Check both of the required 'receipts' are attached (*otherwise the claim will be immediately rejected*).

Receipt #1:

The incentive voucher

Receipt #2:

The receipt/invoice for the expense being claimed against.

Submitting a Claim for a District Incentive: Step 7

All District Incentives should be claimed for separately (to assist with status tracking).

You are ready to 'Submit the Report' for approval!

Note: District Incentive claims should contain a single expense line only.

The screenshot displays the SAP Concur 'Manage Expenses' page for a specific claim. The breadcrumb trail is 'Home / Expense / Manage Expenses / SM-D91-202411-Incentive-GGQ'. The claim title is 'SM-D91-202411-Incentive-GGQ £40.00'. Below the title, it indicates 'Not Submitted' and provides the 'Report Number: 9A9K37'. Action buttons include 'Submit Report', 'Copy Report', and 'Delete Report'. A red arrow points from the 'Submit Report' button to the text 'You are ready to \'Submit the Report\' for approval!'. Below the title, there are links for 'Report Details', 'Print/Share', 'Manage Receipts', and 'View Available Receipts'. A table titled 'Expenses' contains one line item with the following details:

☐	Comment	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested	
☐			Cash/Out of Pocket	Incentives (7082)		11/23/2024	£40.00	...
							£40.00	

At the bottom of the page, there is a footer with the SAP Concur logo, links for 'Service Status (US2)', 'Contact Support', 'Cookie Preferences', and 'Cookie Statement'. The footer also includes the text 'Last signed in: 11/23/2024 01:49 pm' and '© Copyright 2024 - SAP Concur - All Rights Reserved'.

Submitting a Claim for a District Incentive: Step 8

User Agreement Acceptance & Final Submission

Step 8.1: Select 'Accept & Continue'

The screenshot shows the SAP Concur 'Manage Expenses' page for report SM-D91-2024. A modal dialog titled 'User Electronic Agreement' is open, displaying a certification statement and four numbered terms. The 'Accept & Continue' button is highlighted with a red arrow.

User Electronic Agreement

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official business for the Company and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the Company in full for those expenses.

Buttons: Cancel, **Accept & Continue**

Comment	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
		Cash/Out of Pocket	Incentives (7082)		11/23/2024	£40.00
						£40.00

Step 8.2: Select 'Submit Report'

The screenshot shows the SAP Concur 'Manage Expenses' page for report SM-D91-2024. A modal dialog titled 'Report Totals' is open, displaying payment breakdowns and totals. The 'Submit Report' button is highlighted with a red arrow.

Report Totals

Company Payments
£40.00
Employee

Employee Payments
£0.00
Company

Amount Total:	Due Employee:	Owed Company:
£40.00	£40.00	£0.00

Requested Amount:	Total Paid By Company:	Total Owed By Employee:
£40.00	£40.00	£0.00

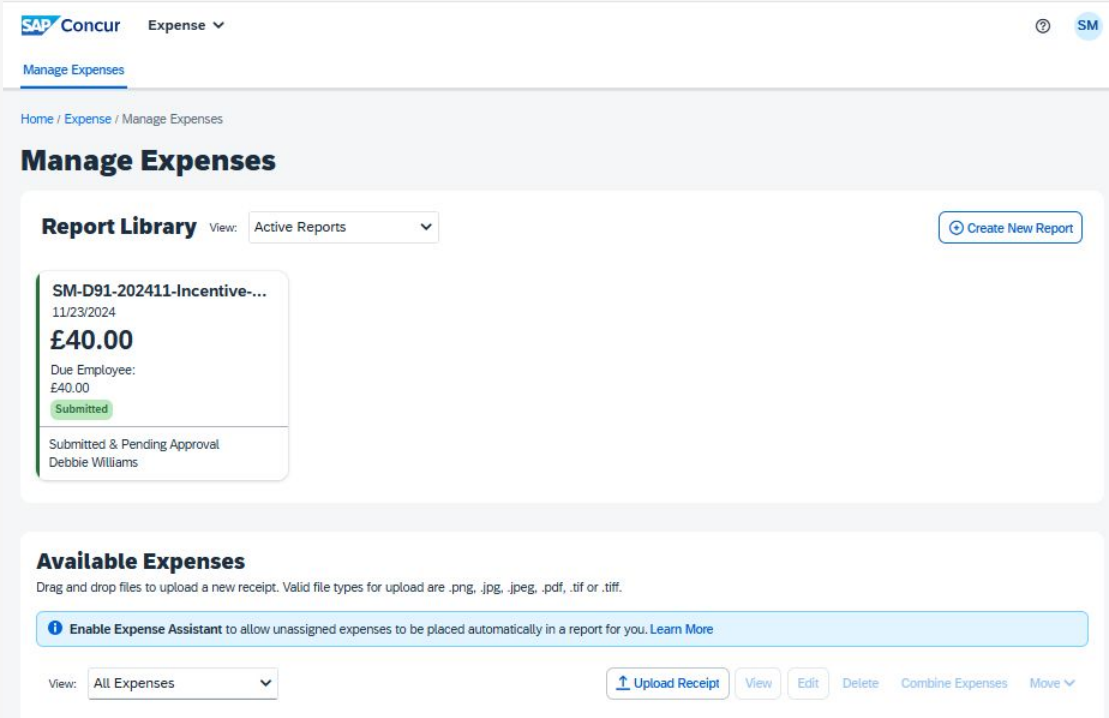
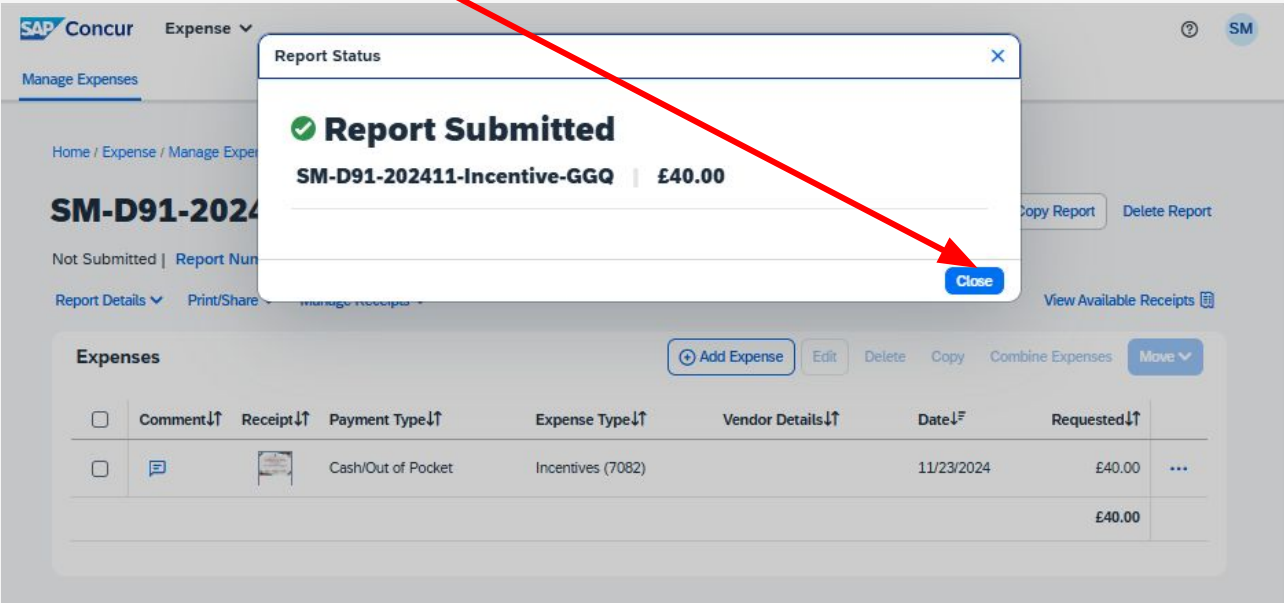
Buttons: Cancel, **Submit Report**

Submitting a Claim for a District Incentive: Step 9

Report Submitted confirmation

Your District Incentive claim has now been successfully submitted! Select 'Close' to return to the 'Manage Expenses' section.

Note: The Manage Expenses section can be used to view all of your active reports and view their status.



How to...

Submit a Misc. Expense claim

***Follow for all other expense types
(except Mileage Claims & District Incentives)***

Submitting a Misc. Expense Claim - Overview

High Level Process

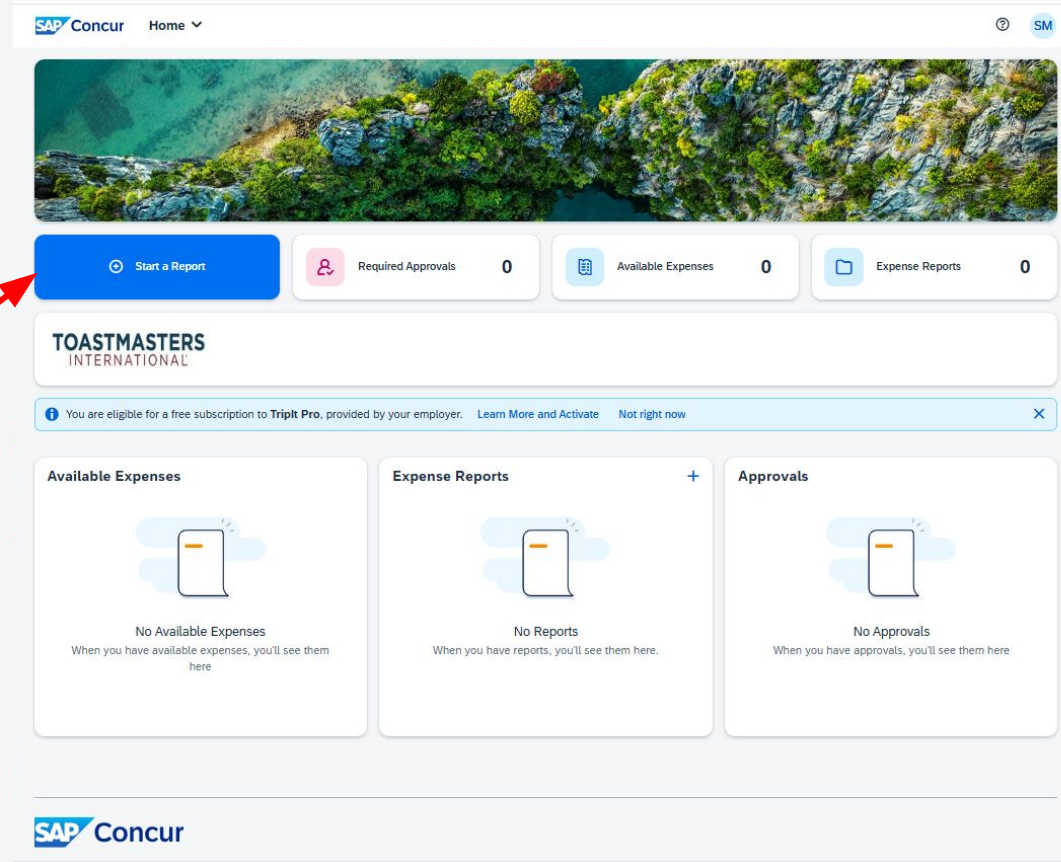
1. Click on **START A REPORT**
2. Next enter a **REPORT NAME** in the following format: **XX-D91-YYYYMM-Description**
Where **XX** = your initials, **YYYY** = Year, **MM** = Month & **Description** = Reason for Expense
*For example: **SM-D91-202411-Hallmark Promo Mats***
3. **ADD EXPENSES** – complete all required fields (including descriptions), upload receipt(s) and save
4. Repeat for all expense lines and, once complete, review & submit

Notes

- All expense claims (Division, Area or Club) must be submitted via Concur
- Claims MUST be submitted **within 30 days** of incurring the expense
- **Expense Approval consists of 3 stages: DFM + DD + WHQ**

Submitting a Misc. Expense Claim: **Step 1**

**Start a NEW
Expense Claim by
clicking on
'+ Start a Report'**



Submitting a Misc. Expense Claim: **Step 2**

Create New Expense Report

Add details and select 'Create Report'.

Details include:

- **Report Name:**
Enter a **Report Name** in the following format:
XX-D91-YYYYMM-Description
Where **XX** = your initials, **YYYY** = Year, **MM** = Month
& **Description** = Description of Expense

For example: SM-D91-202411-HallmarkPromoMats
- **Report Date:** the date the expense was incurred
- **Comment:** further details/explanation of the expense (to assist with the approval process)

The screenshot shows the 'Create New Report' form in SAP Concur. The form includes fields for 'Report Name' (containing 'SM-D91-202411-HallmarkPromo...'), 'Policy' (set to '*District Expense Policy'), and 'Report Date' (set to '11/23/2024'). A 'Comment' field contains 'Marketing/Promotional materials for Hallmark Speakers.' At the bottom right, there are 'Cancel' and 'Create Report' buttons. A red arrow points from the 'Add details and select 'Create Report'.' instruction to the 'Create Report' button.

Note: The Report Name must be entered in the specified format otherwise the claim will be automatically rejected

Submitting a Misc. Expense Claim: **Step 3**

Add Expense(s)

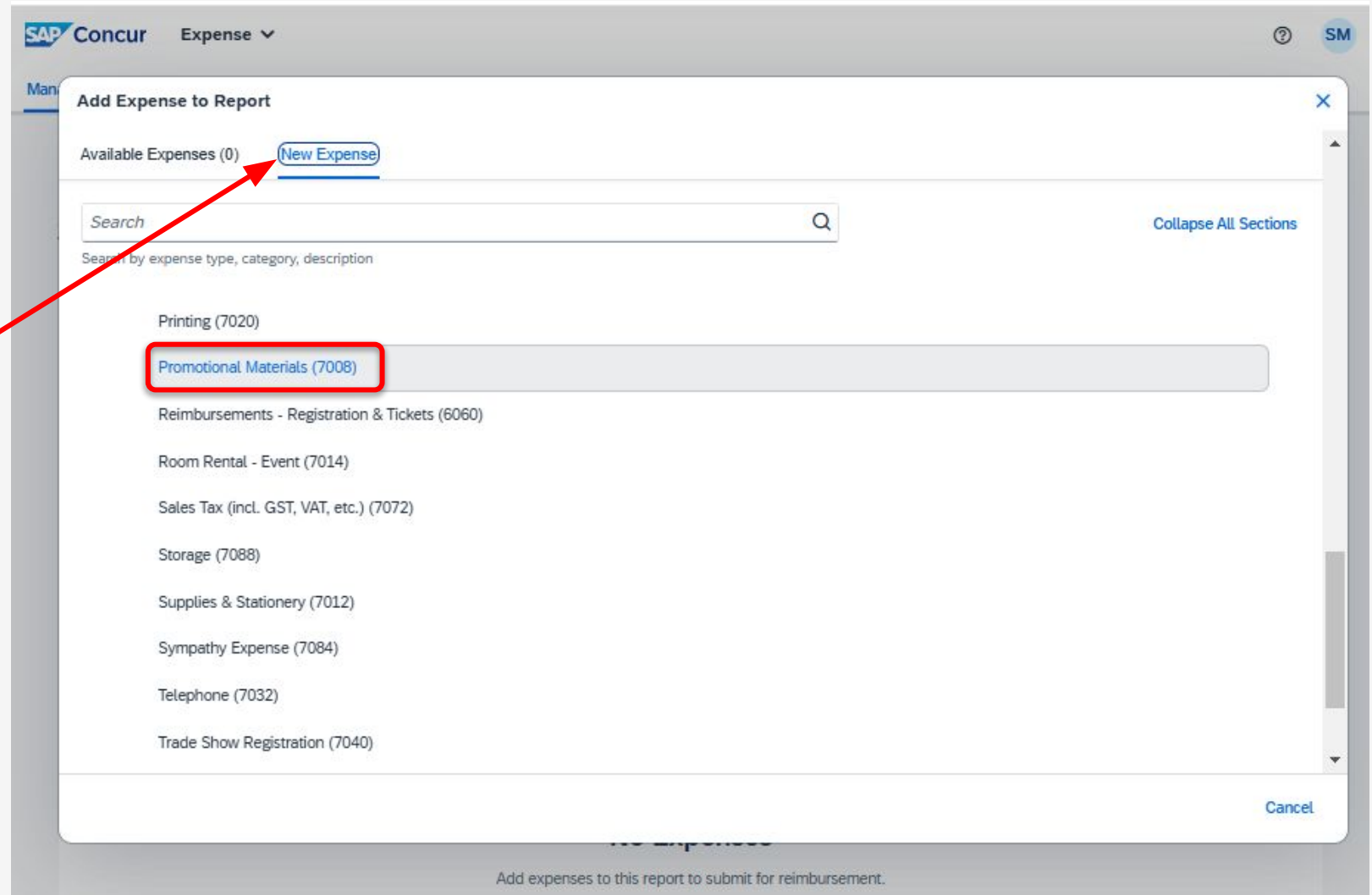
Click 'Add Expense'

The screenshot displays the SAP Concur 'Expense' management interface. At the top, the SAP Concur logo and 'Expense' dropdown are visible. Below the header, the breadcrumb trail reads 'Home / Expense / Manage Expenses / SM-D91-202411-HallmarkPromoMats'. The main title is 'SM-D91-202411-HallmarkPromoMats £0.00', with a 'Submit Report' button and a 'Delete Report' link. Below this, it states 'Not Submitted | Report Number: SVBQ27'. A row of links includes 'Report Details', 'Print/Share', 'Manage Receipts', and 'View Available Receipts'. The 'Expenses' section features a '+ Add Expense' button, which is highlighted by a red arrow originating from the text 'Click 'Add Expense''. Other buttons in this section include 'Edit', 'Delete', 'Copy', 'Combine Expenses', and 'Move'. Below the buttons is a graphic of a notepad with a yellow highlighter, and the text 'No Expenses' followed by the instruction 'Add expenses to this report to submit for reimbursement.'

Submitting a Misc. Expense Claim: **Step 4**

Add Expense to Report

**Select 'New Expense'
and choose the relevant
expense type...**



The screenshot shows the SAP Concur 'Add Expense to Report' dialog box. At the top, it says 'SAP Concur Expense'. Below that, 'Add Expense to Report' is the title of the dialog. Under 'Available Expenses (0)', there is a 'New Expense' button. A red arrow points from the text 'Select 'New Expense'' to this button. Below the button is a search bar with the placeholder text 'Search' and a magnifying glass icon. To the right of the search bar is a link that says 'Collapse All Sections'. Below the search bar, it says 'Search by expense type, category, description'. A list of expense types is shown, including 'Printing (7020)', 'Promotional Materials (7008)', 'Reimbursements - Registration & Tickets (6060)', 'Room Rental - Event (7014)', 'Sales Tax (incl. GST, VAT, etc.) (7072)', 'Storage (7088)', 'Supplies & Stationery (7012)', 'Sympathy Expense (7084)', 'Telephone (7032)', and 'Trade Show Registration (7040)'. The 'Promotional Materials (7008)' option is highlighted with a red box. At the bottom right of the dialog is a 'Cancel' button. Below the dialog, there is a footer that says 'Add expenses to this report to submit for reimbursement.'

Submitting a Misc. Expense Claim: **Step 5**

Fill in the 'New Expense' details, with reference to the guide below:

Field	Required Contents (Grey indicates default value)
Expense Type	Select the relevant 'Expense Type'
Transaction Date	Date the claim is submitted
Business Purpose	Brief summary of expense
Enter Vendor Name	Not required
City of Purchase	Not required
Payment Type	Cash/Out of Pocket
Amount	Expense amount
Currency	UK, Pound Sterling (GBP)
Reporting Code	Select the relevant 'Reporting Code'
Event Period	N/A
District	(D91) District 91
Subsidiary	(XXX) Level of Role For example: Division Directors select '(091D) Division'
Comment	Details and explanation of expense

New Expense

Details

Itemizations

* Required field

Expense Type *
Promotional Materials (7008) X

Transaction Date *
11/23/2024

Business Purpose *
Promo materials for Hallmark

Enter Vendor Name

City of Purchase

Payment Type *
Cash/Out of Pocket

Amount *
27.48

Currency *
UK, Pound Sterling (GBP) X

Reporting Code *
(560) Marketing - Other X

Event Period *
N/A X

District
(091) District 91

Subsidiary *
(091A) Area X

Comment
A range of Promo Materials (X, Y & Z) for promoting Hallmark Speakers in the local area.

88/500

Save Expense Save and Add Another Cancel

Receipt

Save Expense Cancel

Hide Receipt



Click to upload or drag and drop files to upload a new receipt.
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
5MB limit per file.

Add Receipt

Submitting a Misc. Expense Claim

Common Expense Codes

Please refer to the following examples of some common codes when submitting expenses.

We must ensure the correct codes are used so that actual expenditure is mapped against budgeted expenses.

Concur Expense Claim Fields		
Expense Category	Expense Type	Reporting Code
Travel	01. Travel > (7062) Mileage	(957) Division Director ; (958) Area Director
	01. Travel > (7064) Taxi / Shuttle	
	01. Travel > (7066) Rail	
	01. Travel > (7068) Other	
TLI Room Hire	02. Other > (7014) Room Rental - Event	(706) ET TLI
TLI Catering	02. Other > (7016) Meal Events	(706) ET TLI
COT Room Hire	02. Other > (7014) Room Rental - Event	(706) ET Training Club Officers
COT Refreshments	02. Other > (7016) Meal Events	(706) ET Training Club Officers
Division Venue Hire for Educational Events	02. Other > (7014) Room Rental - Event	(70X) ET - Other Expenses
Marketing Materials	02. Other > (7008) Promotional Materials	(560) Marketing - Other
New Clubs Banners	02. Other > (7008) Promotional Materials	(580) Club Growth - Building New Clubs
New Clubs Pins	02. Other > (7004) Badges & Pins	(580) Club Growth - Building New Clubs
Perpetual Trophies	02. Other > (7010) Awards (Trophies, Plaques, Ribbons & Certificates)	(802) Speech Contest - Division

Note: this is NOT an exhaustive list of all of the available 'Expense Types' or 'Reporting Codes', so please check the full list (available in the drop-down menus of the relevant fields) in order to select the appropriate code.

Submitting a Misc. Expense Claim: Step 6

Attach Receipt

Misc. expense claims 'receipts' are required - please attach the relevant invoice/receipt.

Step 6.1: Select 'Upload New Receipt'

Step 6.2: Navigate to the relevant 'attachment' (i.e. invoice/receipt) and select.

New Expense

Details Itemizations

Expense Type * * Required field
Promotional Materials (7008) X

Transaction Date * 11/23/2024 Business Purpose * Promo materials for Hallmark

Enter Vendor Name City of Purchase

Payment Type * Cash/Out of Pocket

Amount * 27.48 Currency * UK, Pound Sterling (GBP) X

Reporting Code * 1 (560) Marketing - Other X Event Period * 2 N/A X

District 1 (091) District 91 Subsidiary * 2 (091A) Area X

Comment 88/500
A range of Promo Materials (X, Y & Z) for promoting Hallmark Speakers in the local area.

Save Expense Save and Add Another Cancel

Attach Receipt

Available Receipts (0)

Attach an available receipt to the expense by selecting "Attach". Valid file types for upload are .jpg, .jpeg, .pdf, .tif or .tiff.

Upload New Receipt

You have no available receipts

New Expense

Details Itemizations

Expense Type * * Required field
Promotional Materials (7008) X

Transaction Date * 11/23/2024 Business Purpose * Promo materials for Hallmark

Enter Vendor Name City of Purchase

Payment Type * Cash/Out of Pocket

Amount * 27.48 Currency * UK, Pound Sterling (GBP) X

Reporting Code * 1 (560) Marketing - Other X Event Period * 2 N/A X

District 1 (091) District 91 Subsidiary * 2 (091A) Area X

Comment 88/500
A range of Promo Materials (X, Y & Z) for promoting Hallmark Speakers in the local area.

Save Expense Save and Add Another Cancel

Receipt

PROMO MATS R US
Client: Hallmark Speakers
Invoice: £27.48

PROMO MATS R US.pdf
Remove

Step 6.3: Save Expense

Submitting a Misc. Expense Claim: **Step 7**

Do you have more than one misc. expense to claim?

YES! Then add additional expense lines (*by repeating steps 3 to 6*) for each additional expense.

NO! Then you are ready to 'Submit the Report' for approval (*and move on to step 8*).

SAP Concur Expense ▾

Manage Expenses

Home / Expense / Manage Expenses / SM-D91-202411-HallmarkPromoMats

SM-D91-202411-HallmarkPromoMats £27.48 [Submit Report](#) [Copy Report](#) [Delete Report](#)

Not Submitted | [Report Number: SVBQ27](#)

[Report Details ▾](#) [Print/Share ▾](#) [Manage Receipts ▾](#) [View Available Receipts](#)

Expenses [+ Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Combine Expenses](#) [Move ▾](#)

☐	Comment↑↓	Receipt↑↓	Payment Type↑↓	Expense Type↑↓	Vendor Details↑↓	Date↑↓	Requested↑↓	
☐			Cash/Out of Pocket	Promotional Materials (7008)		11/23/2024	£27.48	...
							£27.48	

SAP Concur

Submitting a Misc. Expense Claim: Step 8

User Agreement Acceptance & Final Submission

Step 8.1: Select 'Accept & Continue'

The screenshot shows the SAP Concur 'Manage Expenses' page for report SM-D91-2024. A modal dialog titled 'User Electronic Agreement' is open, displaying a certification statement and four numbered terms. The 'Accept & Continue' button is highlighted with a red arrow.

User Electronic Agreement

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official business for the Company and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the Company in full for those expenses.

Buttons: Cancel, Accept & Continue

Step 8.2: Select 'Submit Report'

The screenshot shows the SAP Concur 'Manage Expenses' page for report SM-D91-2024. A modal dialog titled 'Report Totals' is open, displaying payment breakdowns and totals. The 'Submit Report' button is highlighted with a red arrow.

Report Totals

Company Payments
£27.48
Employee

Employee Payments
£0.00
Company

Amount Total: £27.48	Due Employee: £27.48	Owed Company: £0.00
Requested Amount: £27.48	Total Paid By Company: £27.48	Total Owed By Employee: £0.00

Buttons: Cancel, Submit Report

Submitting a Misc. Expense Claim: **Step 9**

Report Submitted confirmation

Your misc. expense claim has now been successfully submitted!
Select 'Close' to return to the 'Manage Expenses' section.

Note: The Manage Expenses section can be used to view all of your active reports and view their status.

The screenshot shows a 'Report Submitted' confirmation dialog box from SAP Concur. The dialog has a green checkmark icon and the text 'Report Submitted'. Below this, it displays the report ID 'SM-D91-202411-HallmarkPromoMats' and the amount '£27.48'. At the bottom right of the dialog is a blue 'Close' button. A red arrow points from the 'Close' button in the dialog to the 'Close' button in the 'Manage Expenses' section of the background interface.

Report Submitted
SM-D91-202411-HallmarkPromoMats £27.48

Close

The screenshot shows the 'Manage Expenses' section of the SAP Concur interface. At the top, there's a 'Report Library' section with a dropdown menu set to 'Active Reports' and a 'Create New Report' button. Below this, a report card is displayed for 'SM-D91-202411-HallmarkPromoMats' dated '11/23/2024' with an amount of '£27.48'. The report status is 'Submitted' (indicated by a green tag). Below the report card, it says 'Submitted & Pending Approval' and 'Debbie Williams'. At the bottom, there's an 'Available Expenses' section with instructions on how to upload receipts.

Manage Expenses

Report Library View: Active Reports Create New Report

SM-D91-202411-HallmarkPromoMats
11/23/2024
£27.48
Due Employee: £27.48
Submitted
Submitted & Pending Approval
Debbie Williams

Available Expenses
Drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.