Concur

(Toastmasters Expense Management system)

To be read in conjunction with the District 91 Finance Guide 2026-27

Last Update: 18/07/26 (Violet Karamagi)

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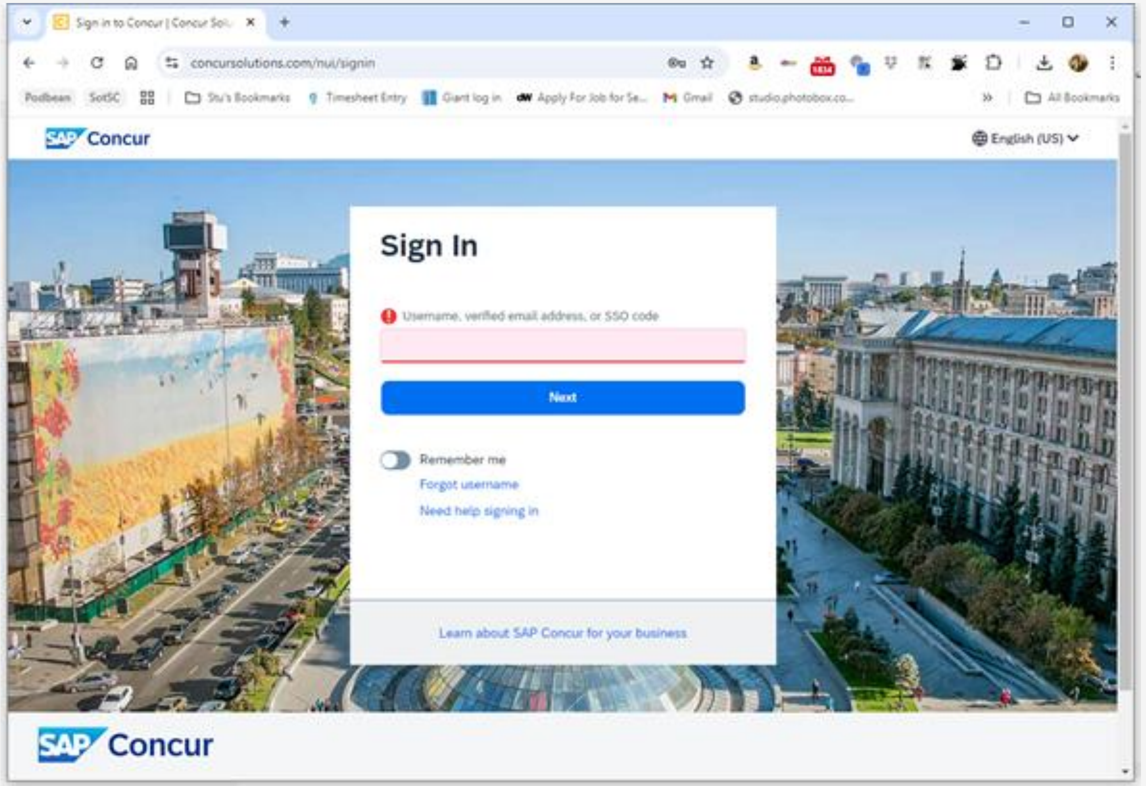
What is Concur?

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

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

Users must be activated by WHQ

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

Registration & 1st Login

Registration

1st Login

Concur Username =

memberID@toastmasters.org

Member ID must be 8 digits.

For example:

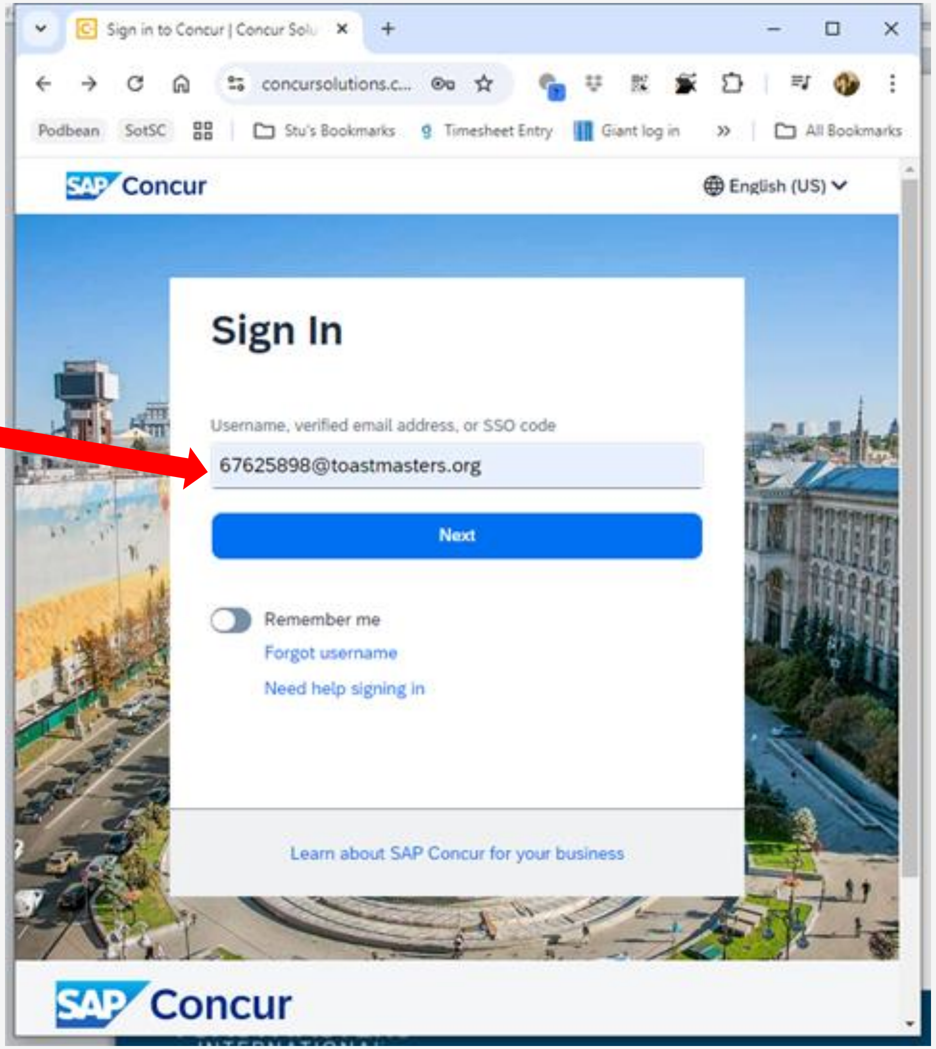
12345678@toastmasters.org

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

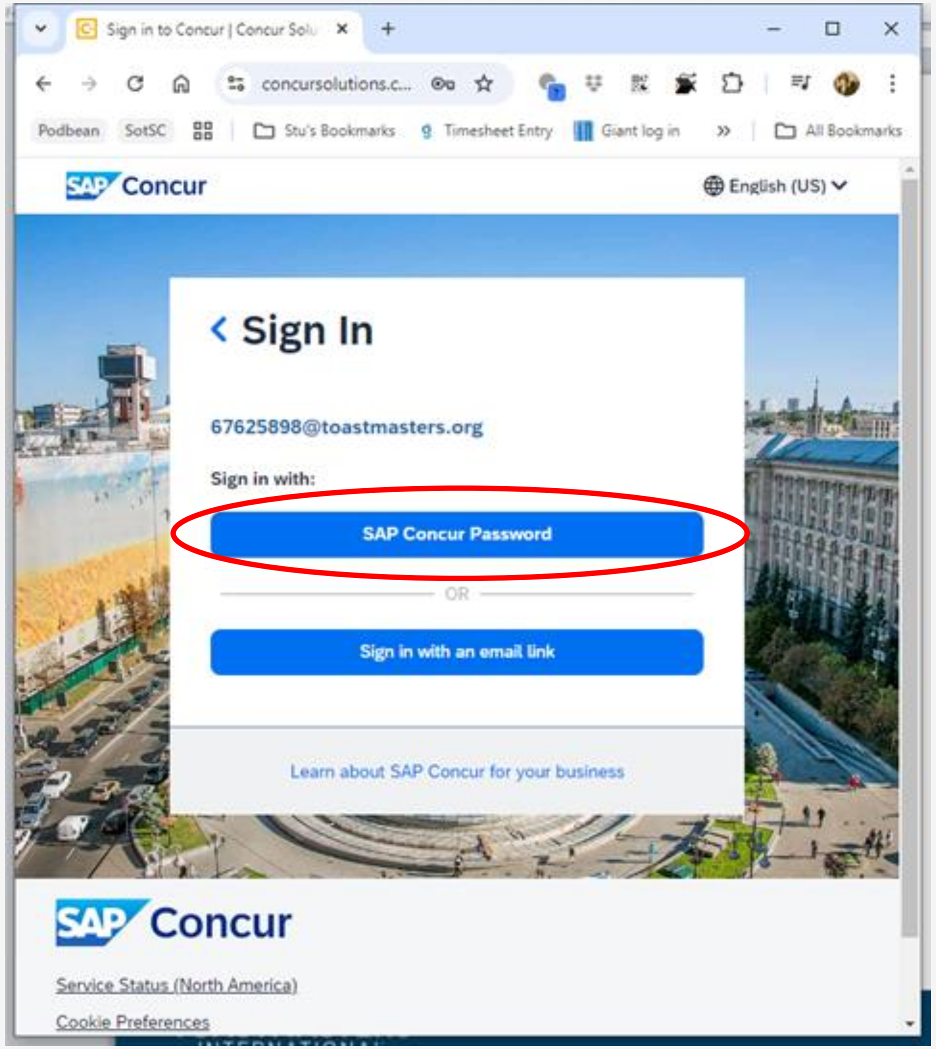
For example:

01234567@toastmasters.org

Go to www.concursolutions.com

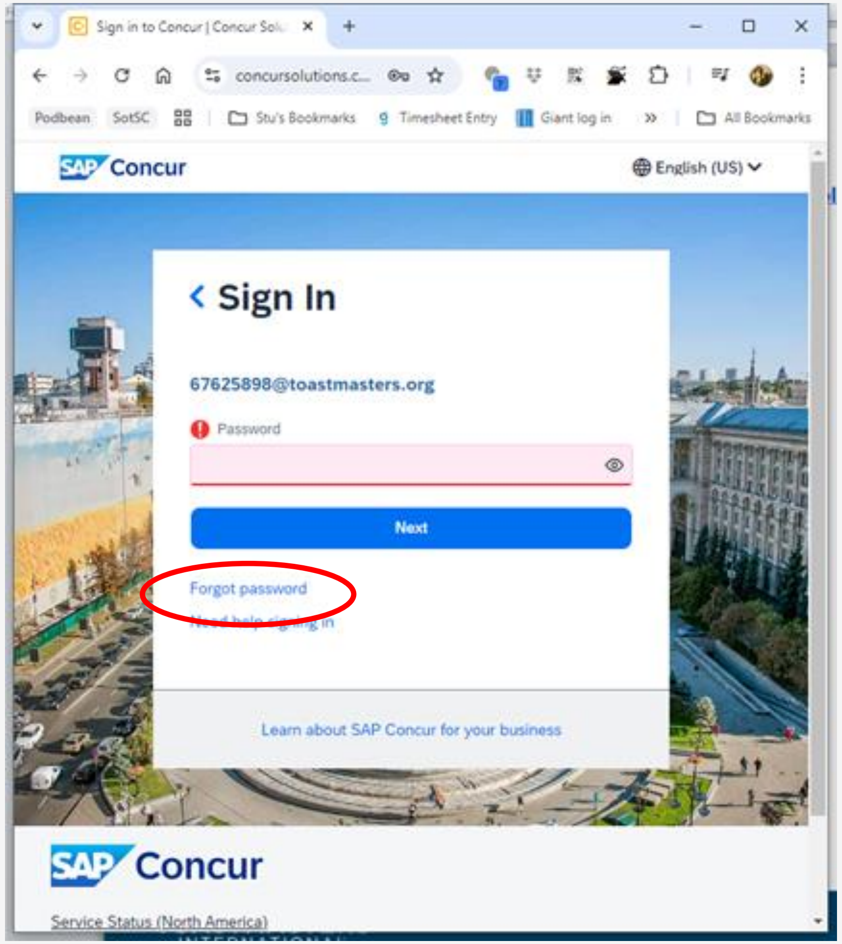


Select 'SAP Concur Password'

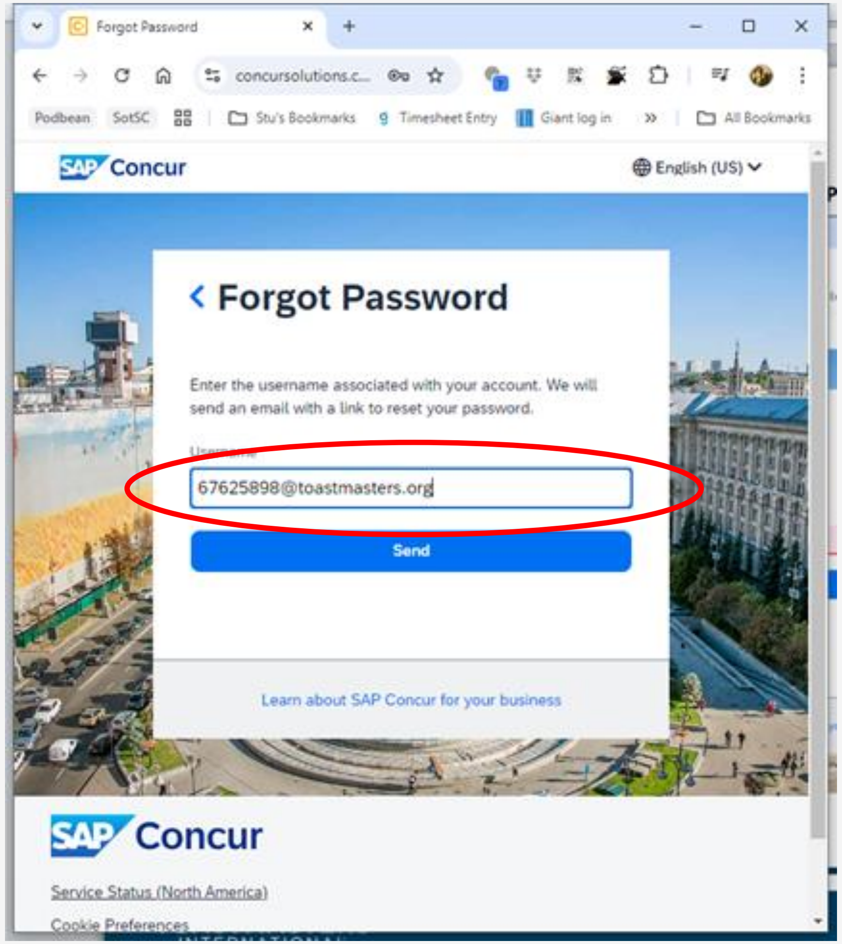


Registration

Select 'Forgot Password'



Hit 'Send'



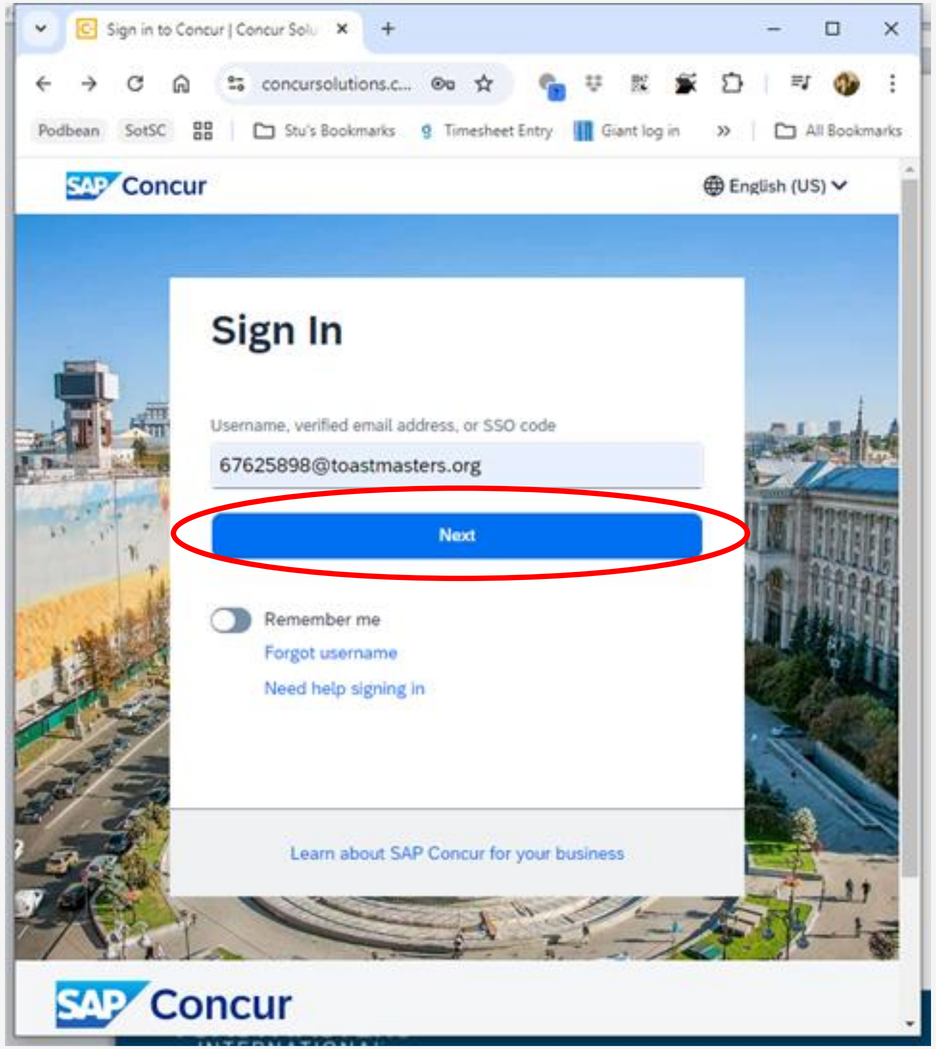
Hitting 'Send' will send an email (to the email address that you used to register with Toastmasters) with instructions on how to reset password.

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

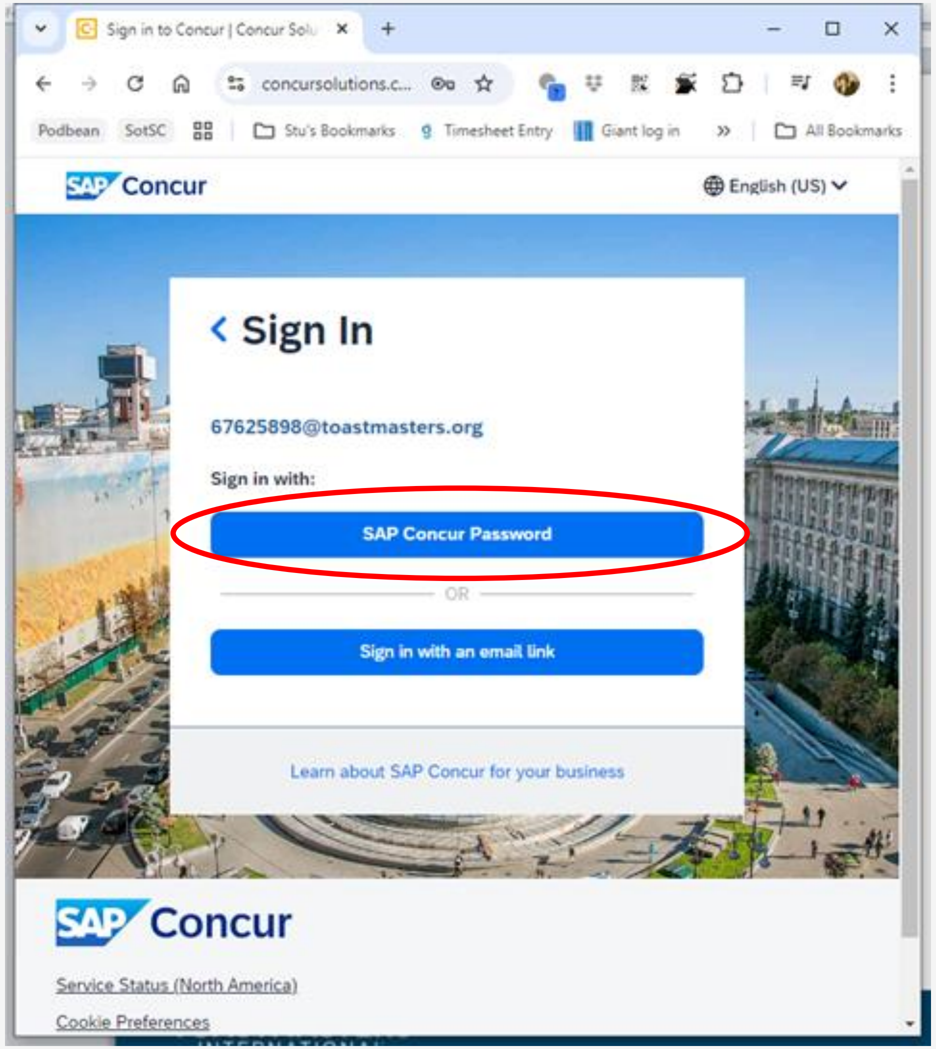
Registration

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

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

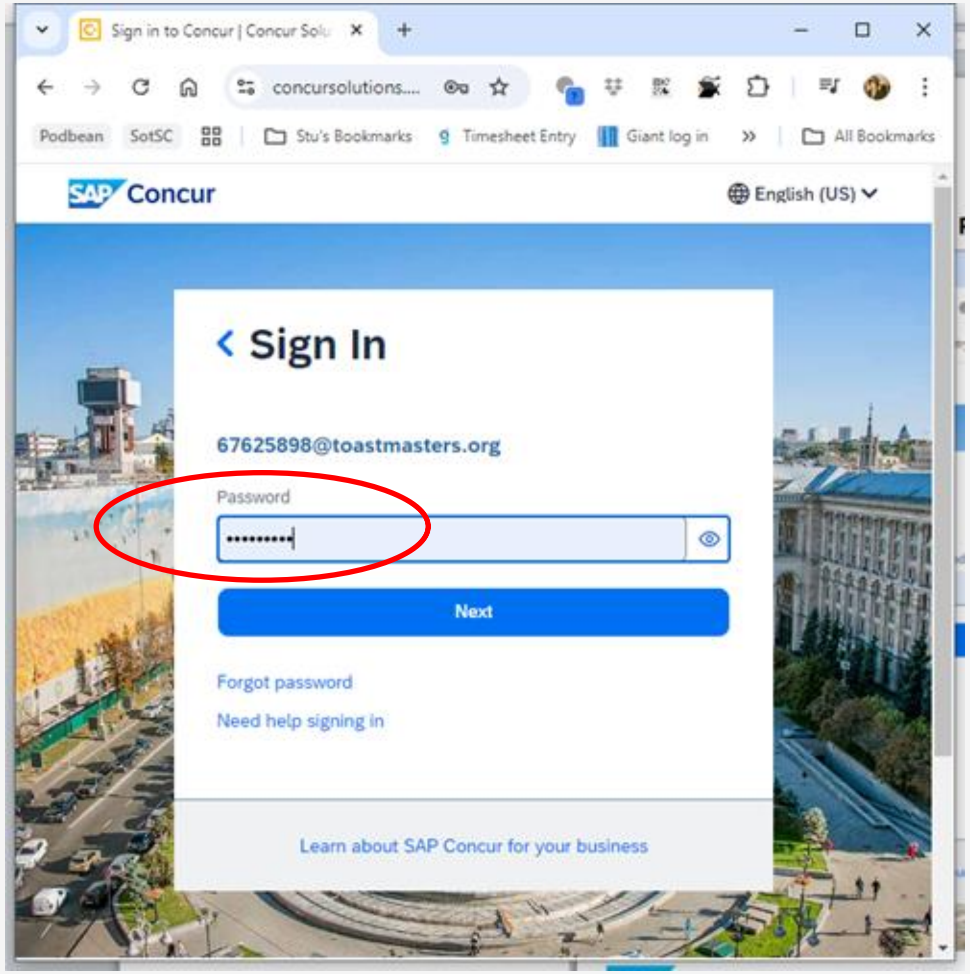


Select 'SAP Concur Password'

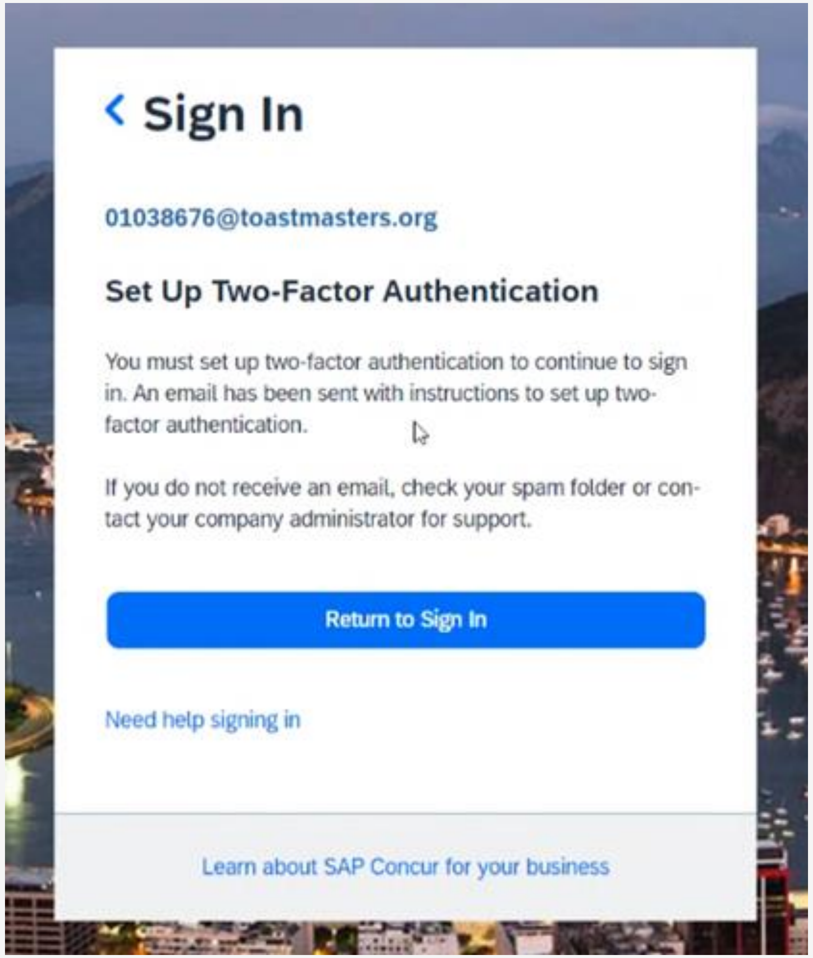


Registration > Two-Factor Authentication

Enter Your Password



Two-Factor Authentication must be setup…

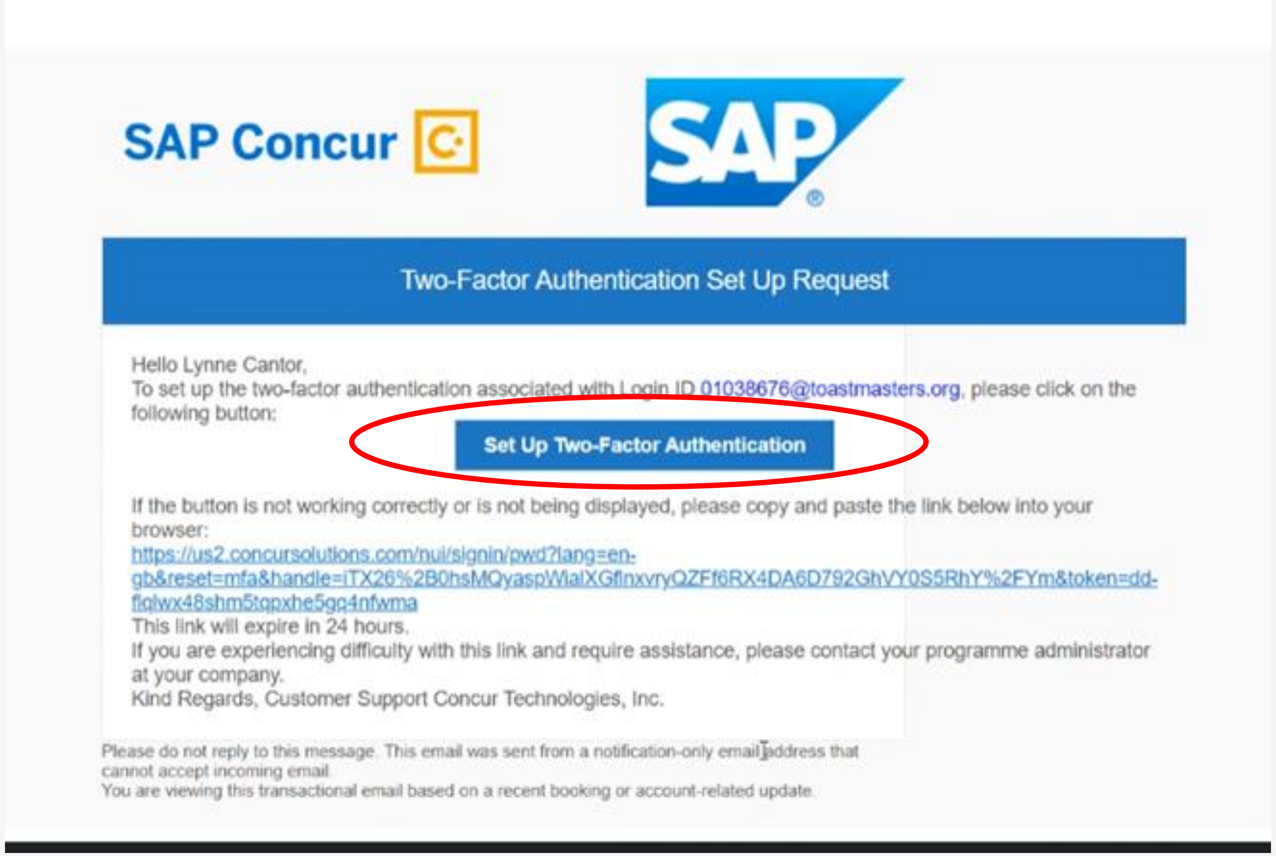


An email is automatically sent (to the email address that you used to register with Toastmasters) with instructions on how to set up two-factor authentication.

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'.


SAP Concur

Two-Factor Authentication Set Up Request

Hello Lynne Cantor,
To set up the two-factor authentication associated with Login ID 01038676@toastmasters.org, please click on the following button:

Set Up Two-Factor Authentication

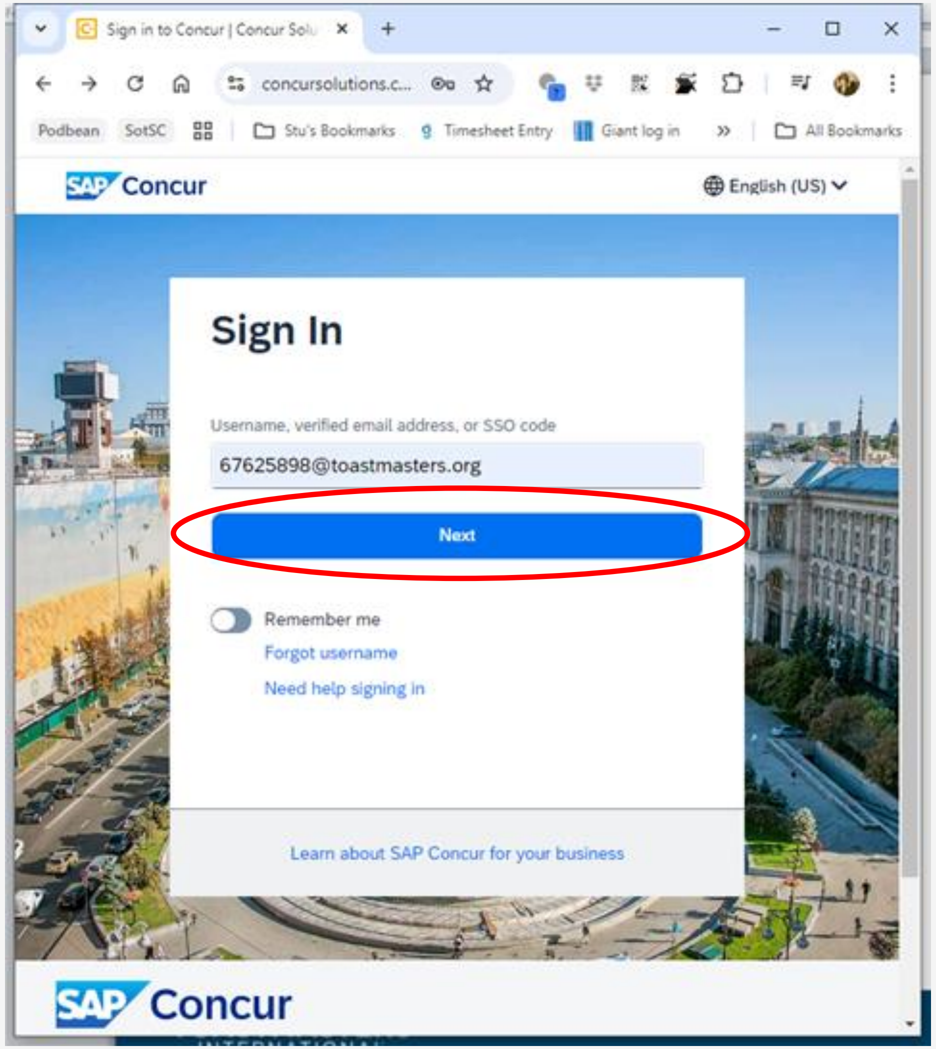
If the button is not working correctly or is not being displayed, please copy and paste the link below into your browser:
https://us2.concursolutions.com/nui/signin/pwd?lang=en-gb&reset=mfa&handle=iTX26%2B0hsMQyaspWialXGflnxvryQZFf6RX4DA6D792GhVY0S5RhY%2FYm&token=dd-flqlwx48shm5tqpxhe5gq4nfwma
This link will expire in 24 hours.
If you are experiencing difficulty with this link and require assistance, please contact your programme administrator at your company.
Kind Regards, Customer Support Concur Technologies, Inc.

Please do not reply to this message. This email was sent from a notification-only email address that cannot accept incoming email.
You are viewing this transactional email based on a recent booking or account-related update.

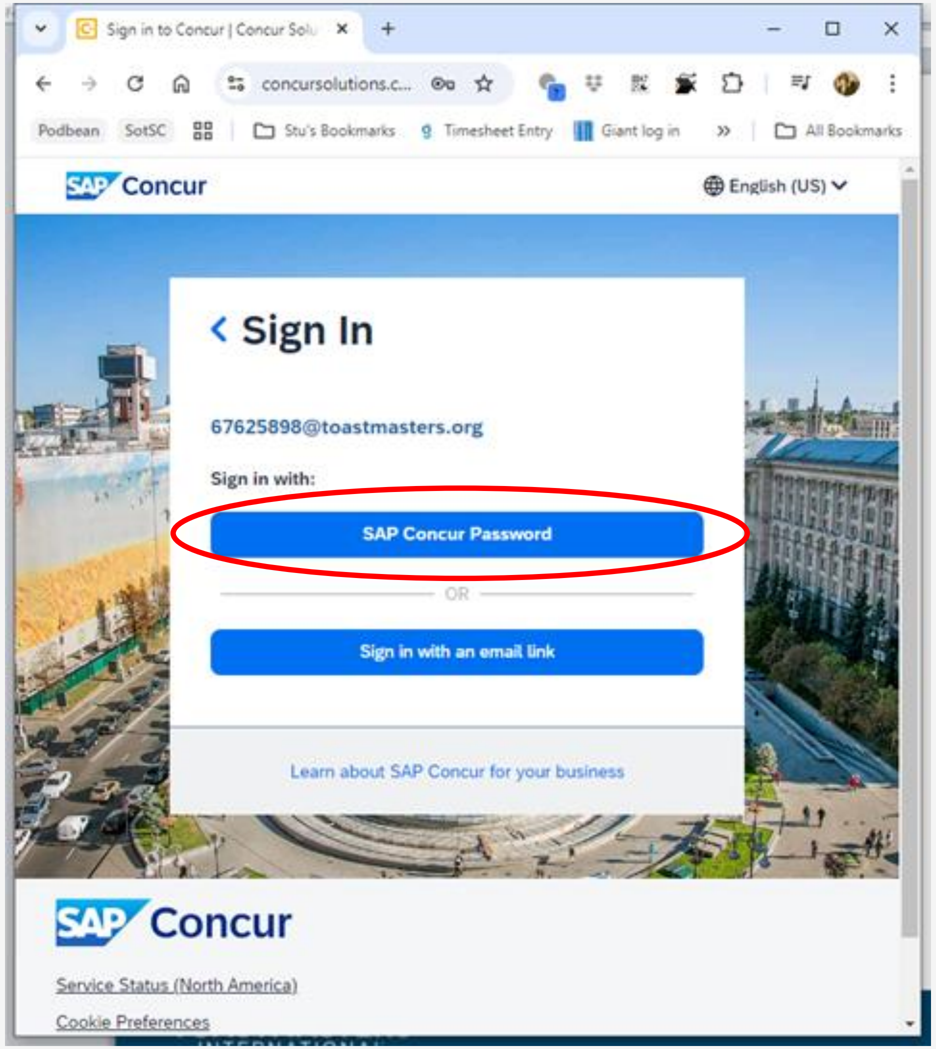
Registration > Two-Factor Authentication

Restart the sign-in process.

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

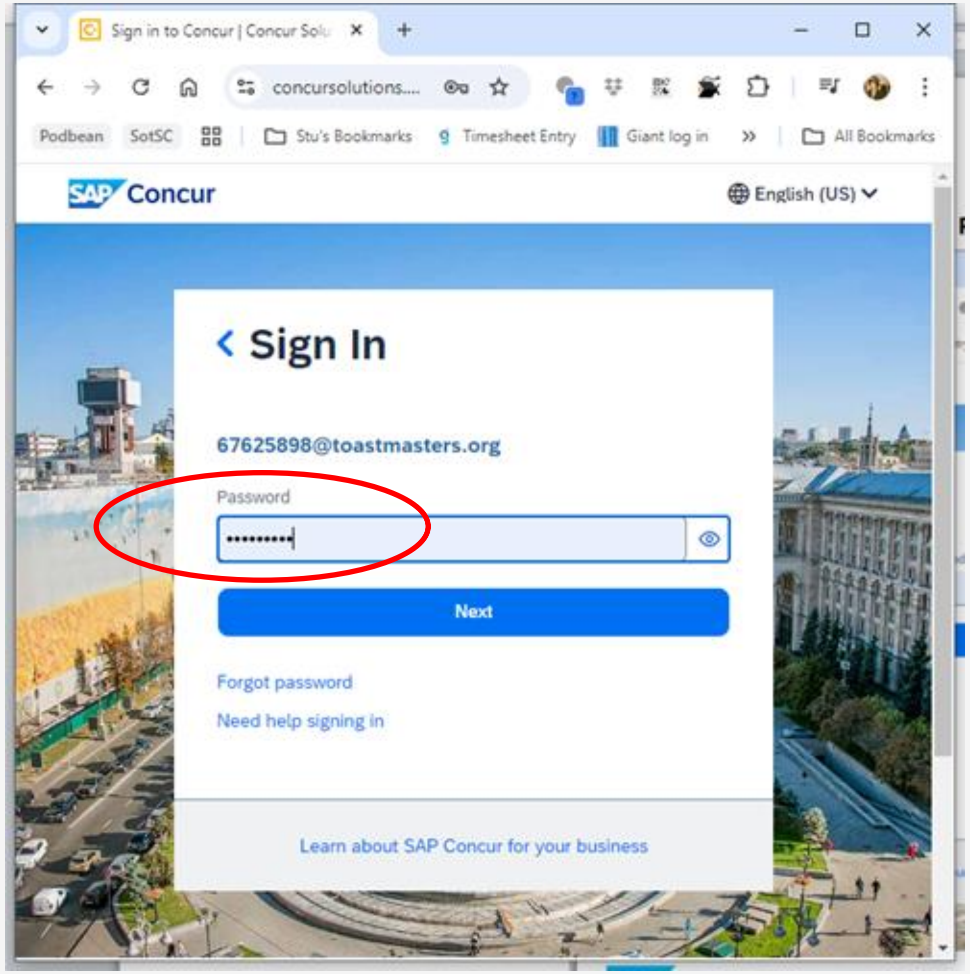


Select 'SAP Concur Password'

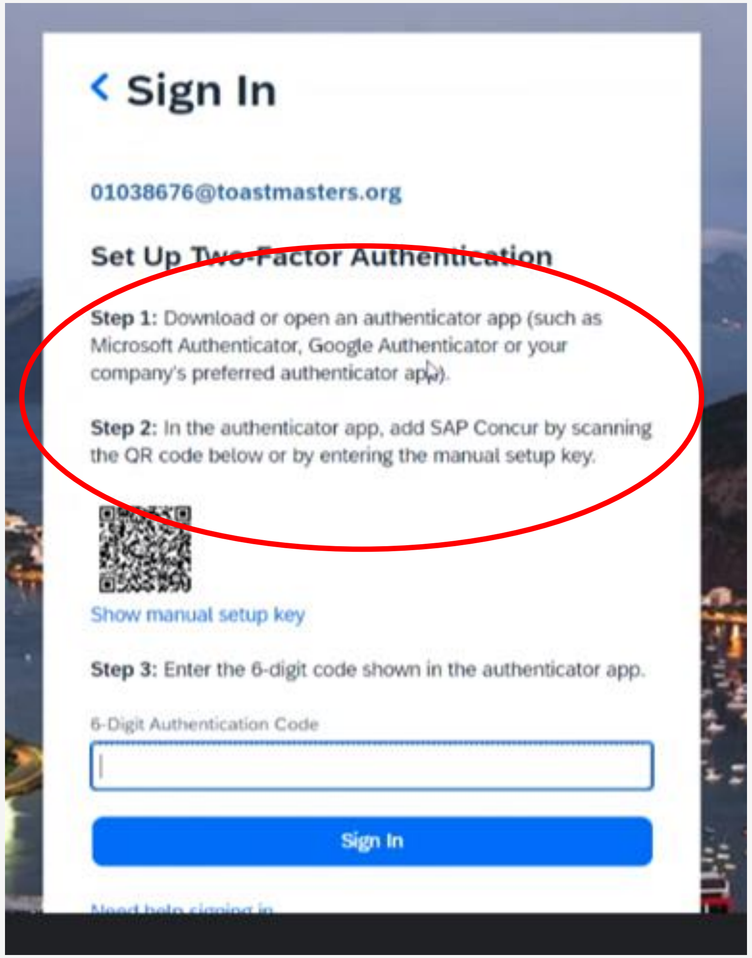


Registration > Two-Factor Authentication

Enter Your Password



Set Up Two-Factor Authentication…



Complete Steps 1 & 2

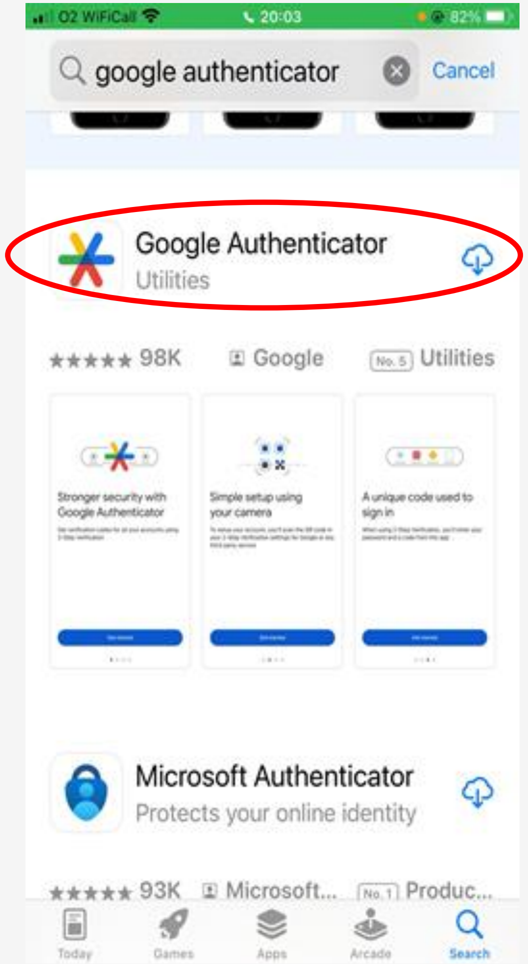
Registration > Two-Factor Authentication

STEP 1:

Download an Authenticator App.

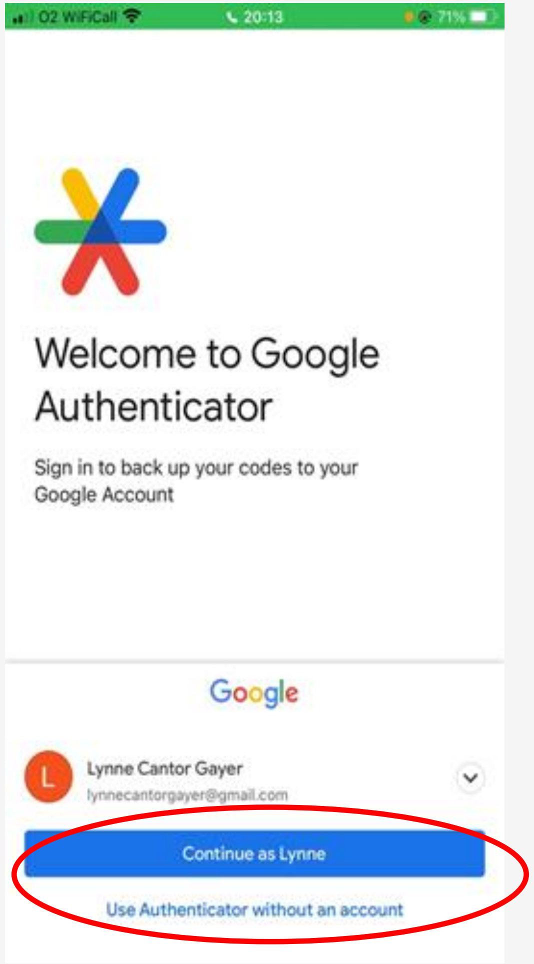
The example shown here is 'Google Authenticator' (shown in the Apple App store, but also available from Google Play)

Download an Authenticator App



Set Up Authenticator App

Login with Google Account OR Use without an account

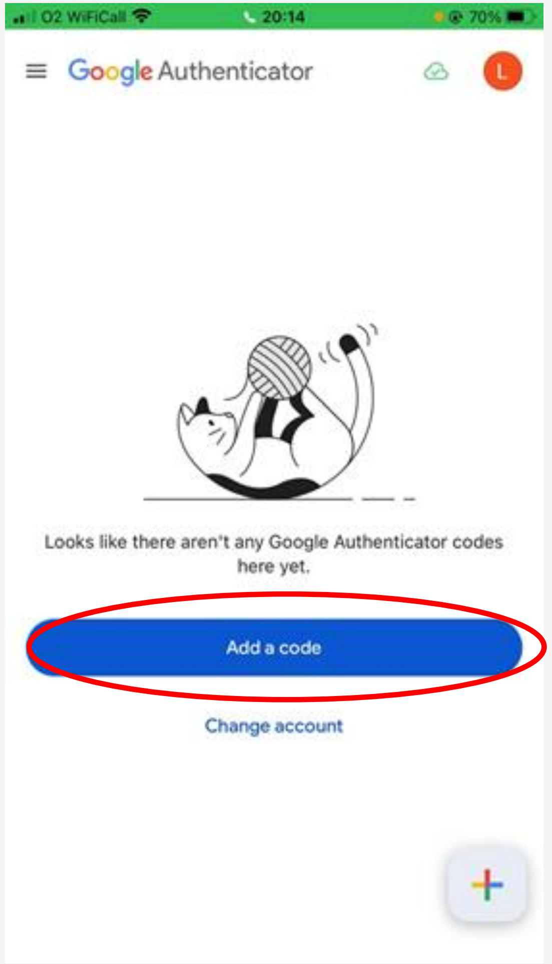


Registration > Two-Factor Authentication

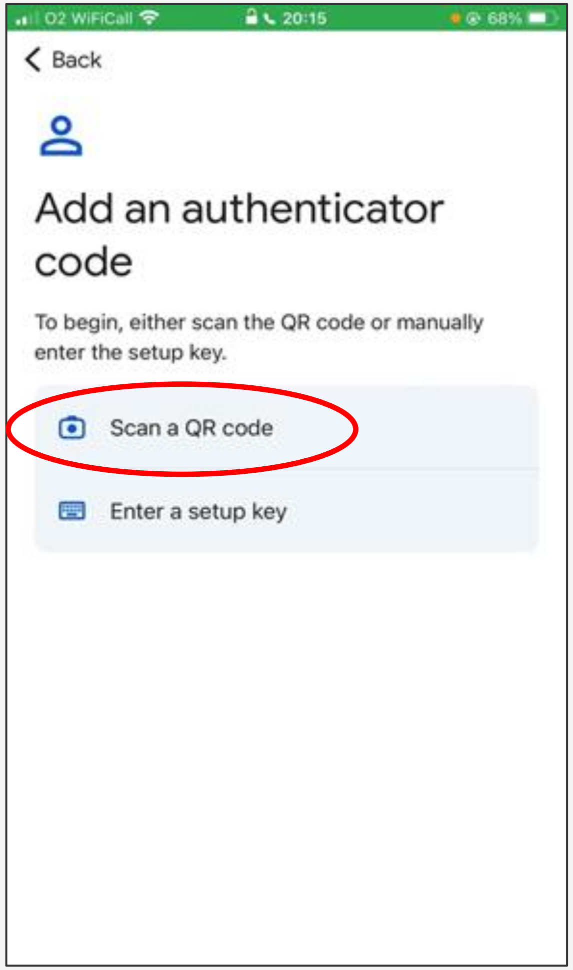
STEP 2:

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

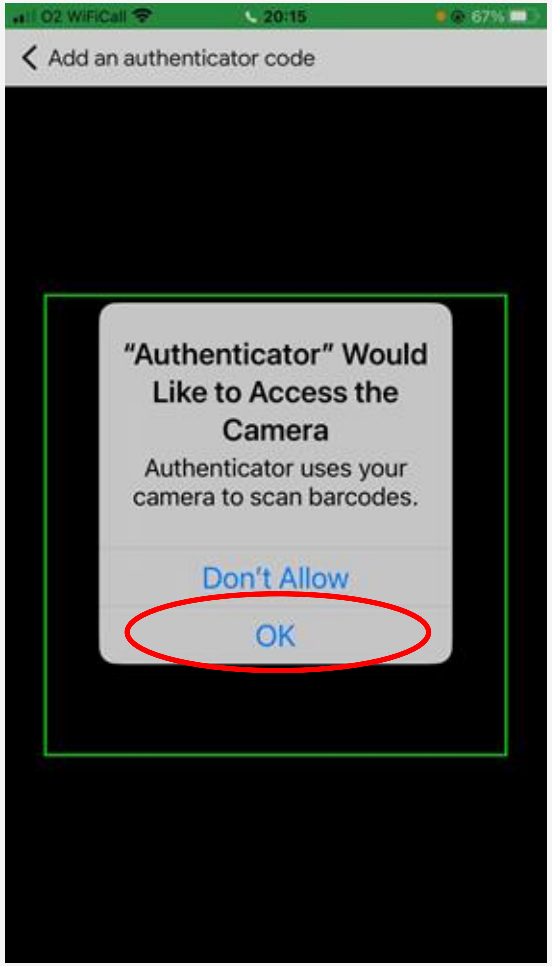
Select 'Add a Code'



Add an Authenticator Code



Allow Authenticator App access to the Camera

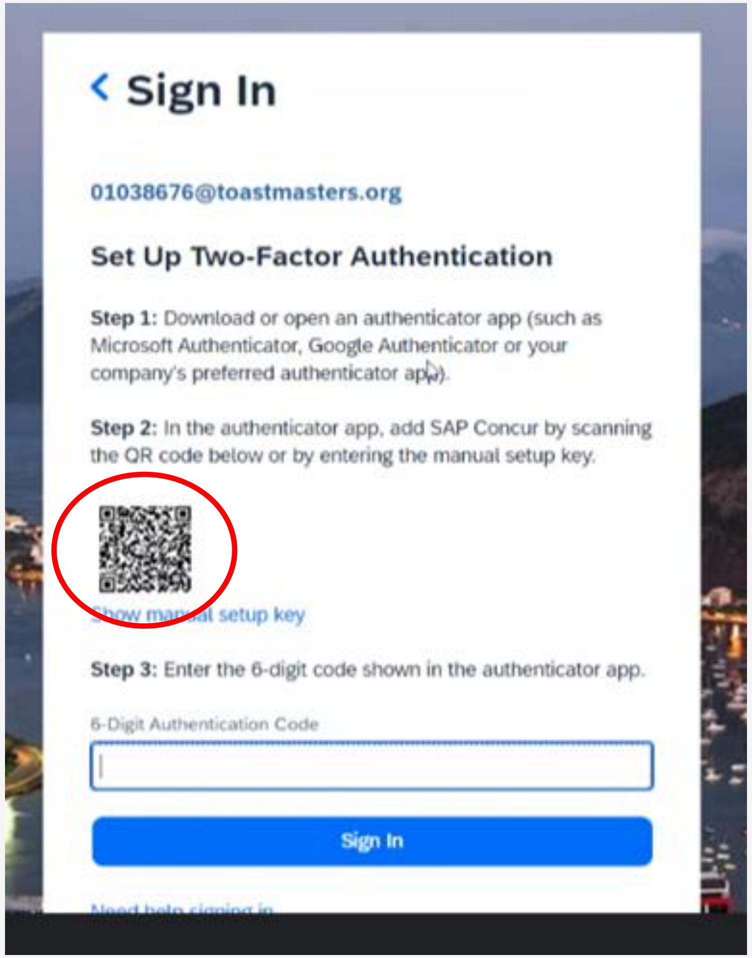


Registration > Two-Factor Authentication

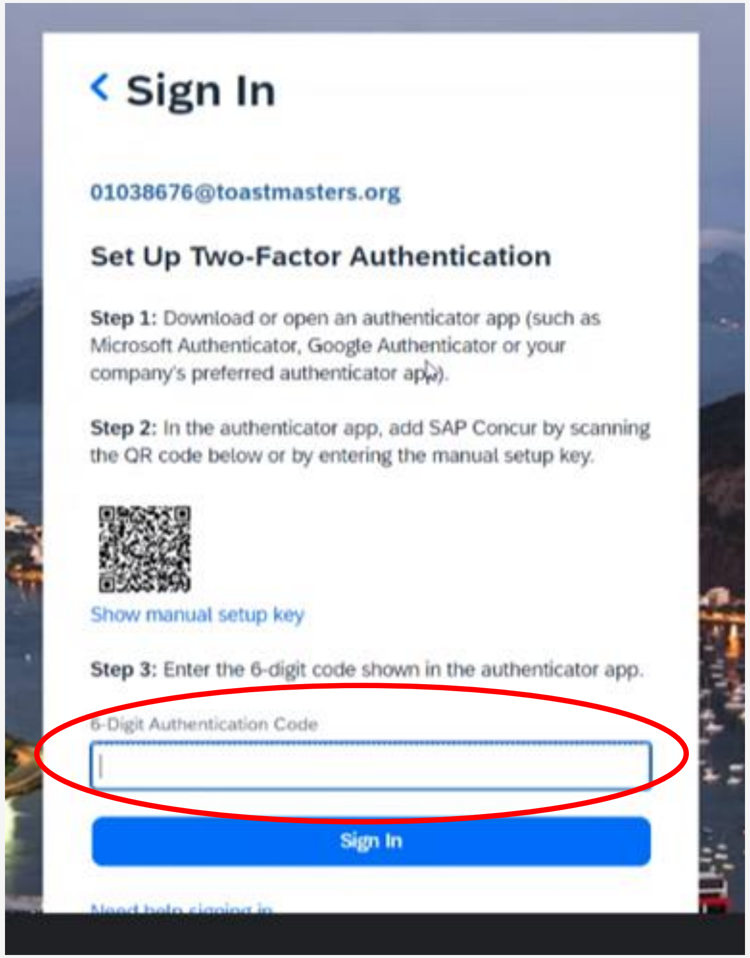
Return to the Concur Login screen and…

Scan the QR code with the Authenticator App and…

Scan the QR Code

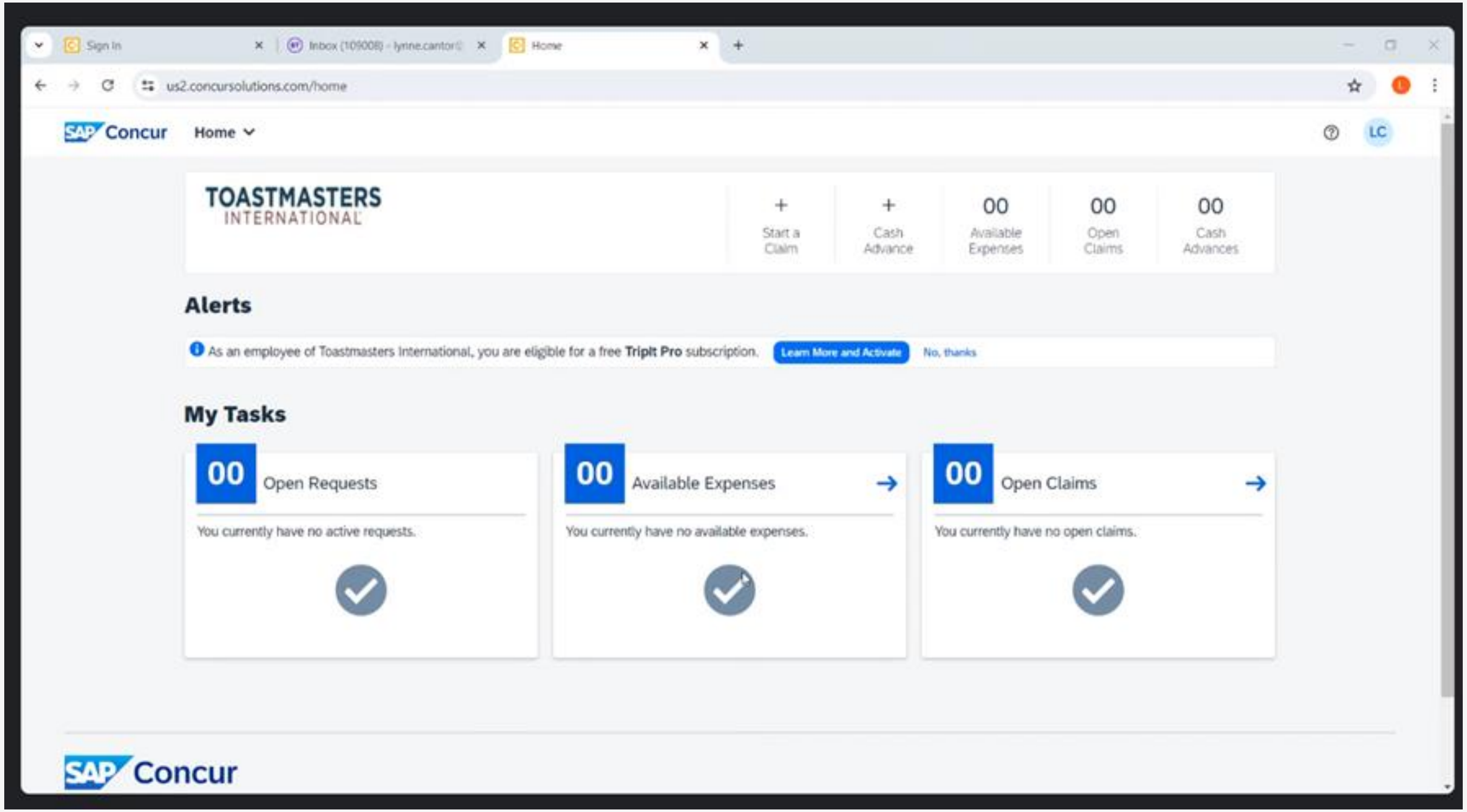


Enter the 6-Digit Authentication Code



Registration > 1st Login Success

The following landing page is displayed upon successful 1st Login



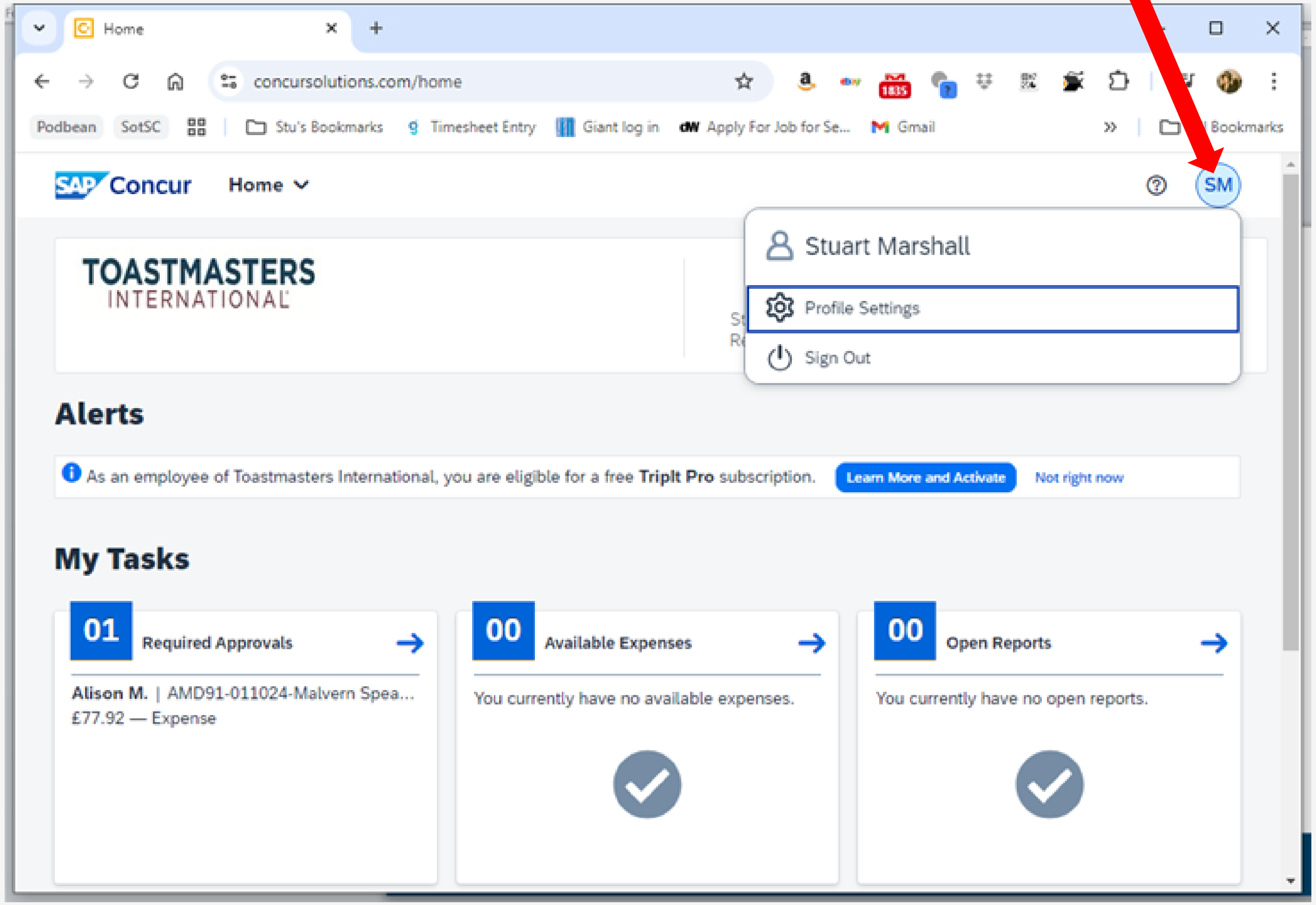
Completing Your User Profile

Completing User Profile

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

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

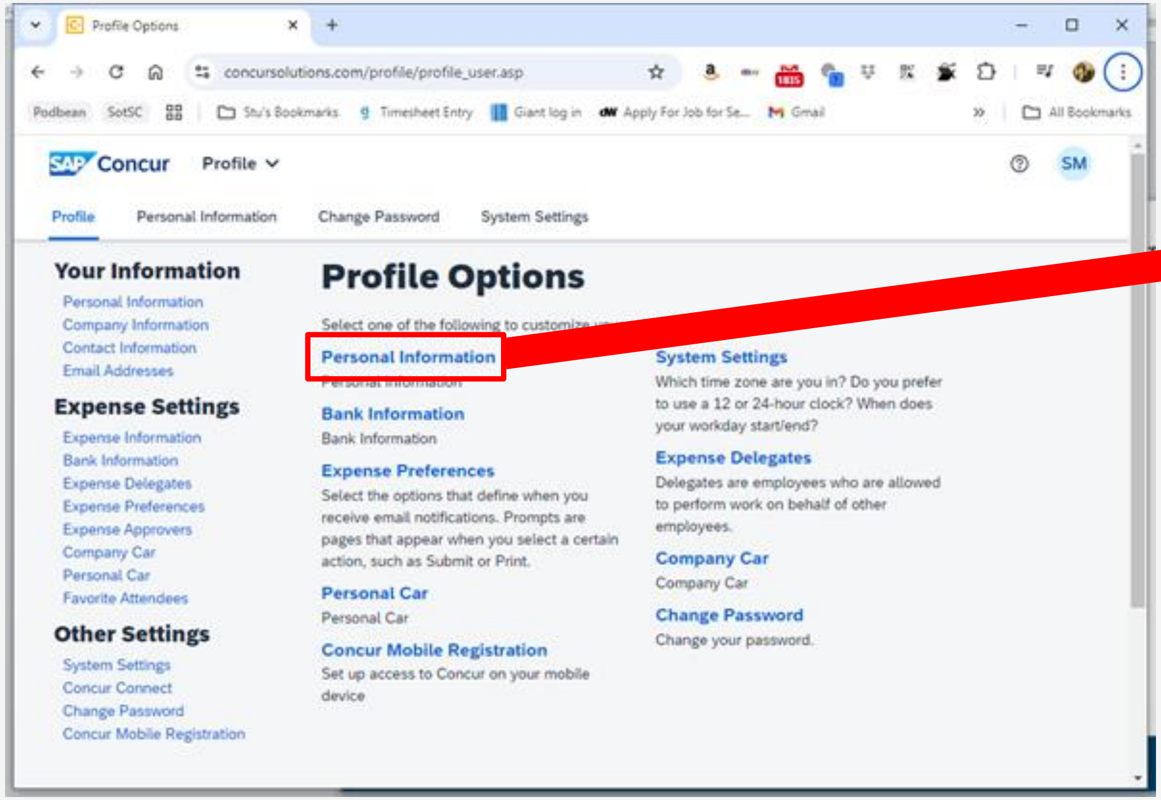
- **Your Personal Information:** Title
- **Expense Settings:** Bank Information
- **Other Settings:** Language & Date/Time Format

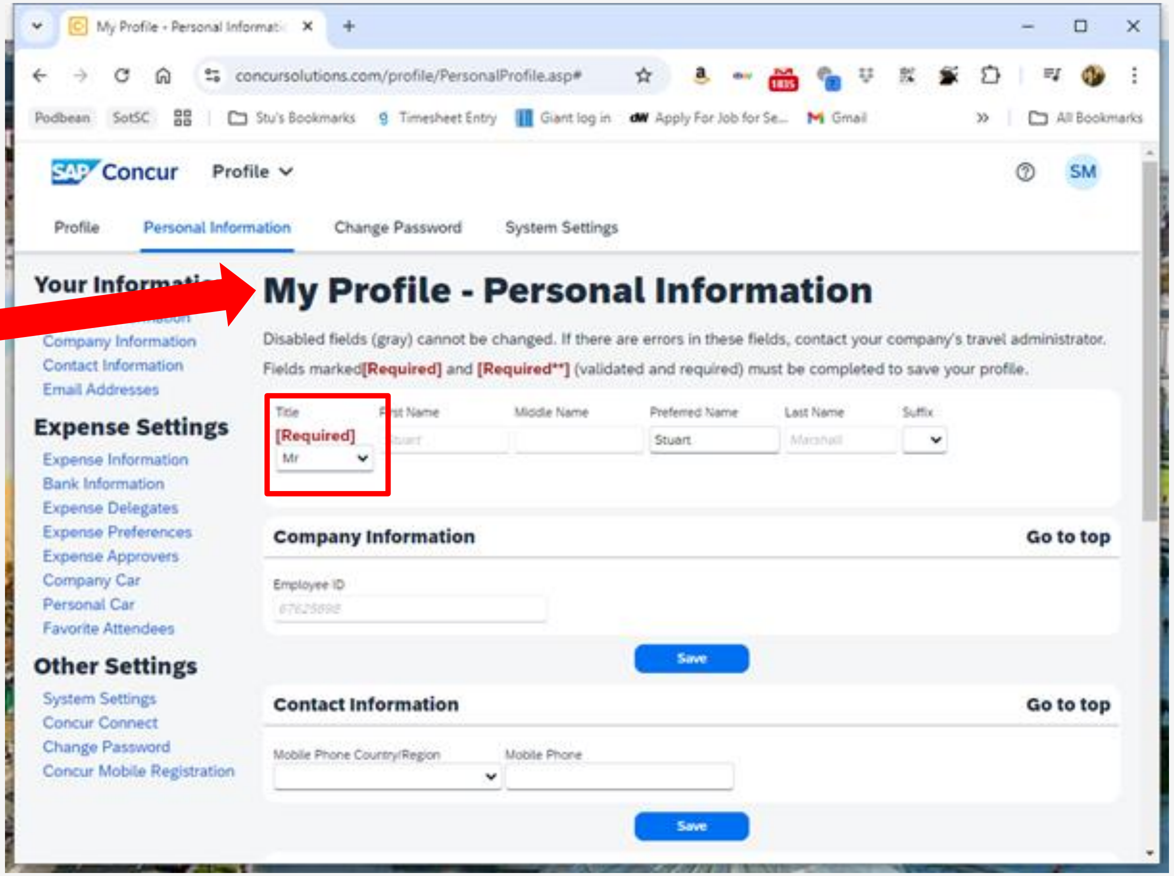


Completing User Profile

Complete Your Personal Information: Name & Contact Details

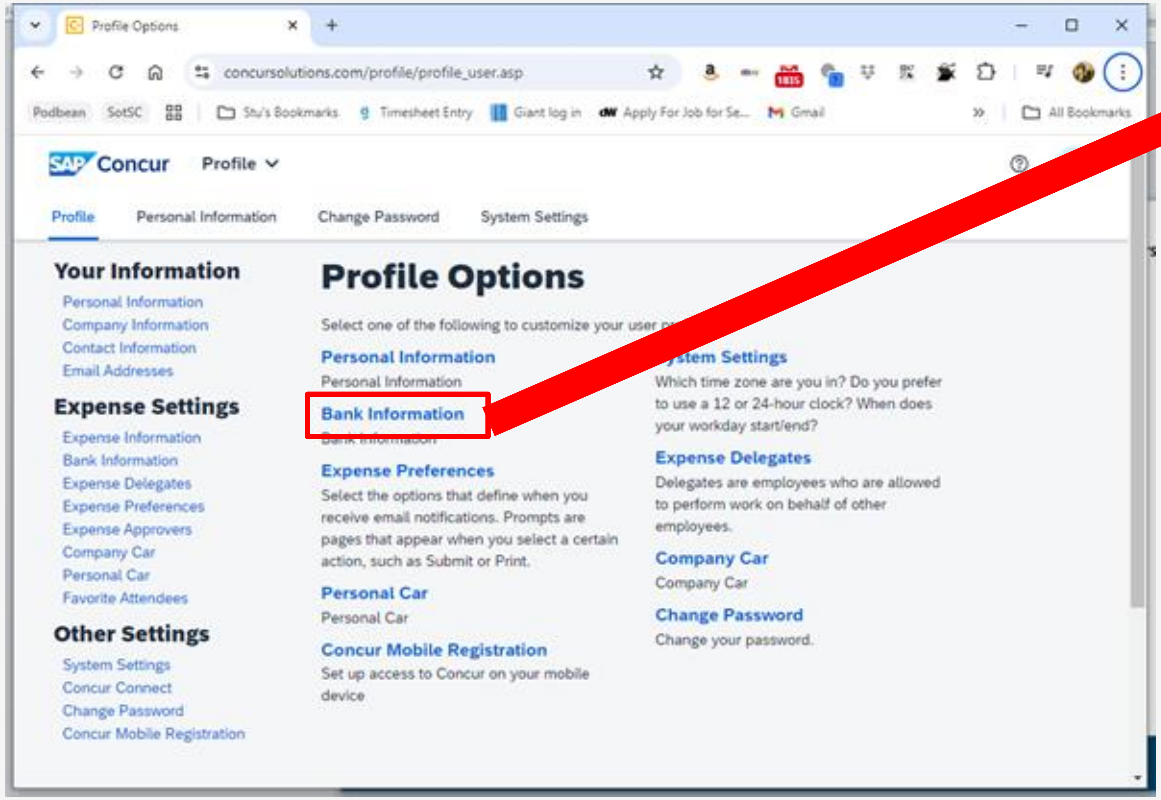
Enter your Title.





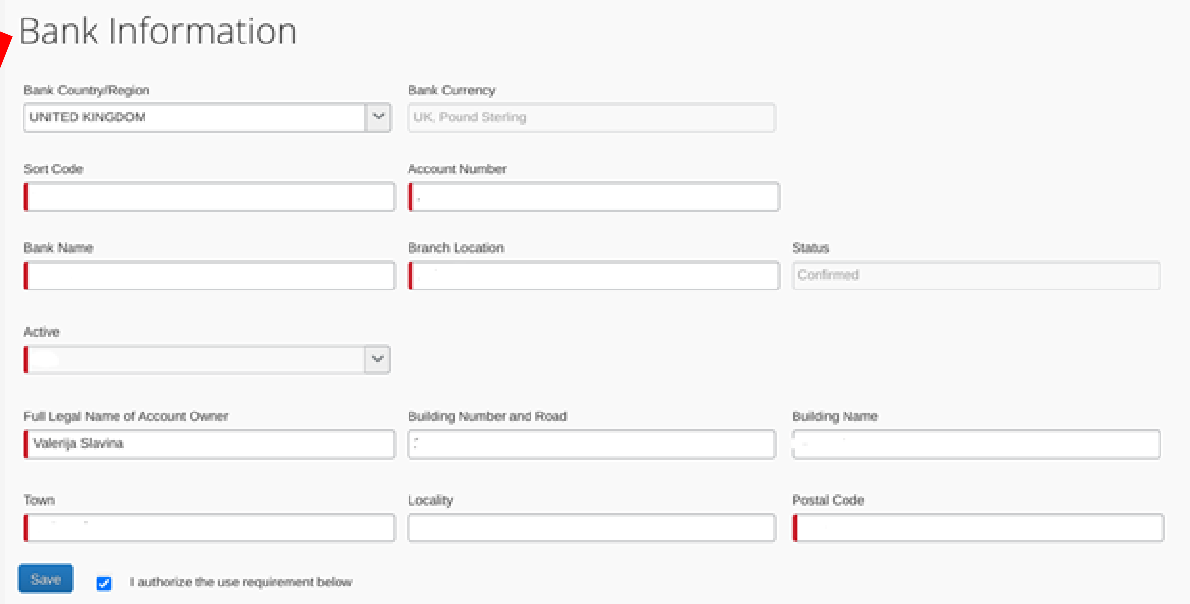
Completing User Profile

Complete Expense Settings: Bank Information



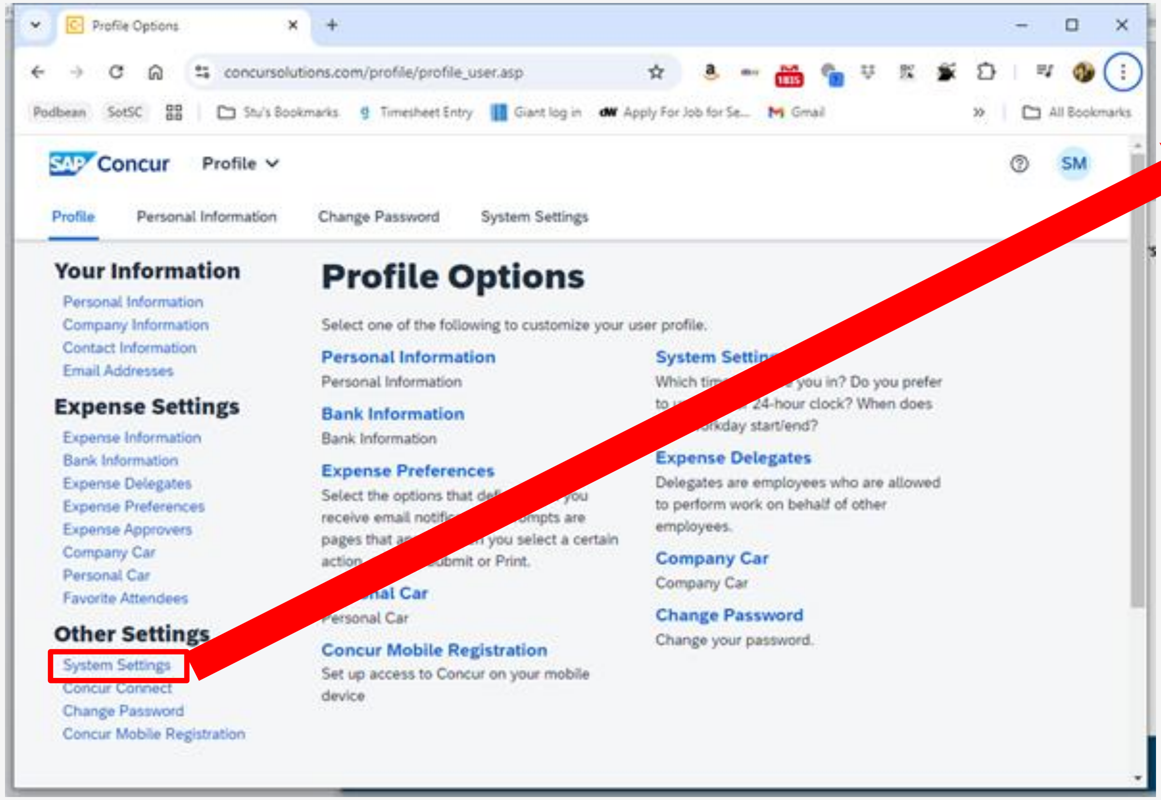
Complete all Bank Details

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

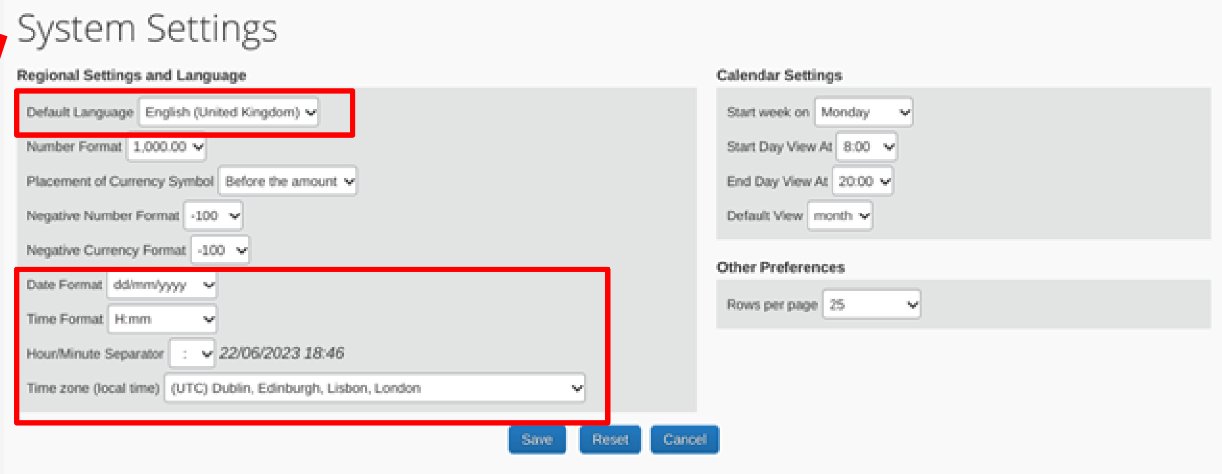


Completing User Profile

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



Update Language & Date/Time Format

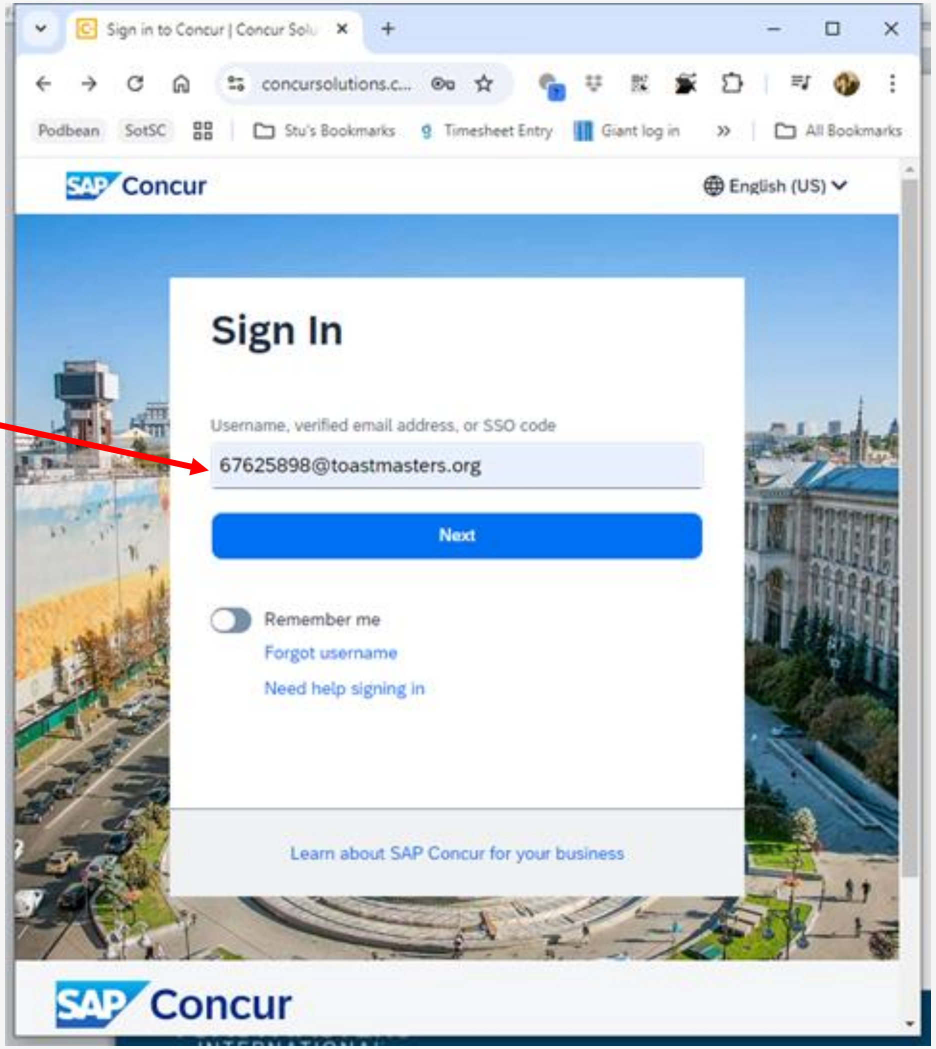


Login

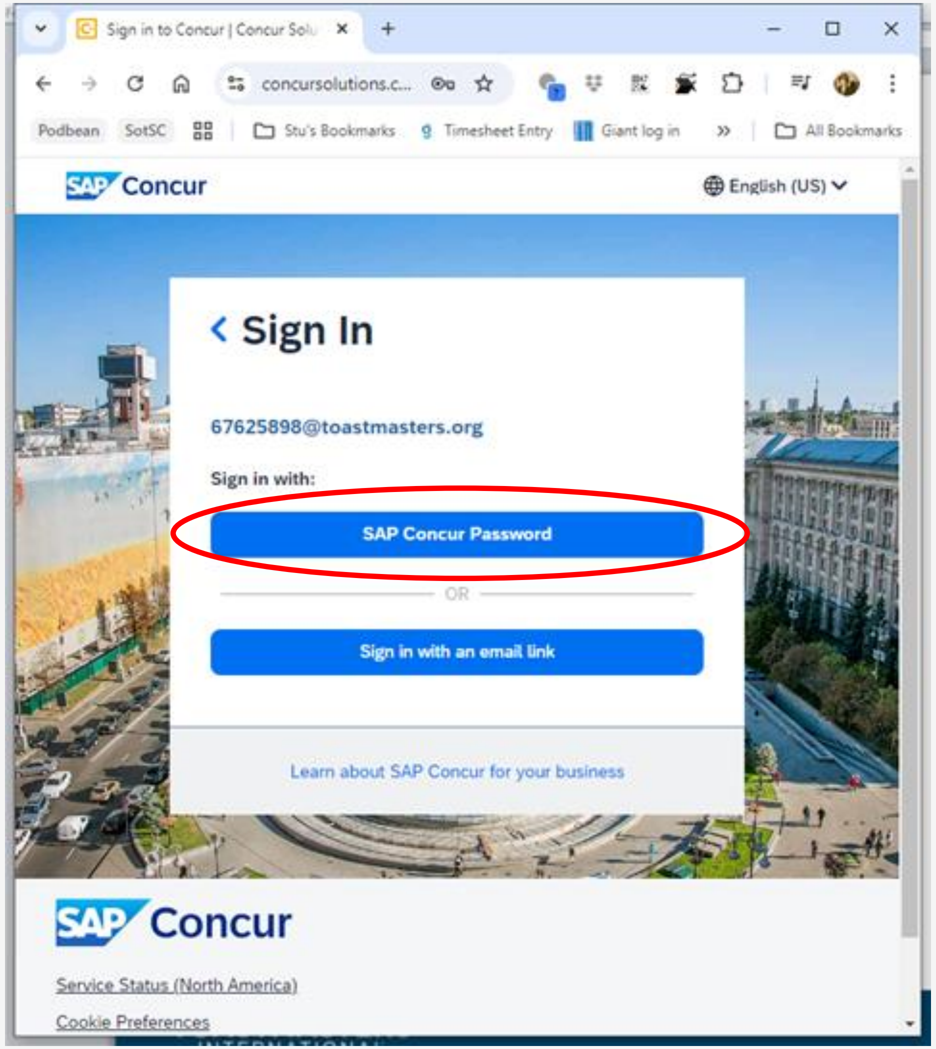
Login

Standard Login

Go to www.concursolutions.com



Select 'SAP Concur Password'



Concur Username =

memberID@toastmasters.org

Member ID must be 8 digits.

For example:

12345678@toastmasters.org

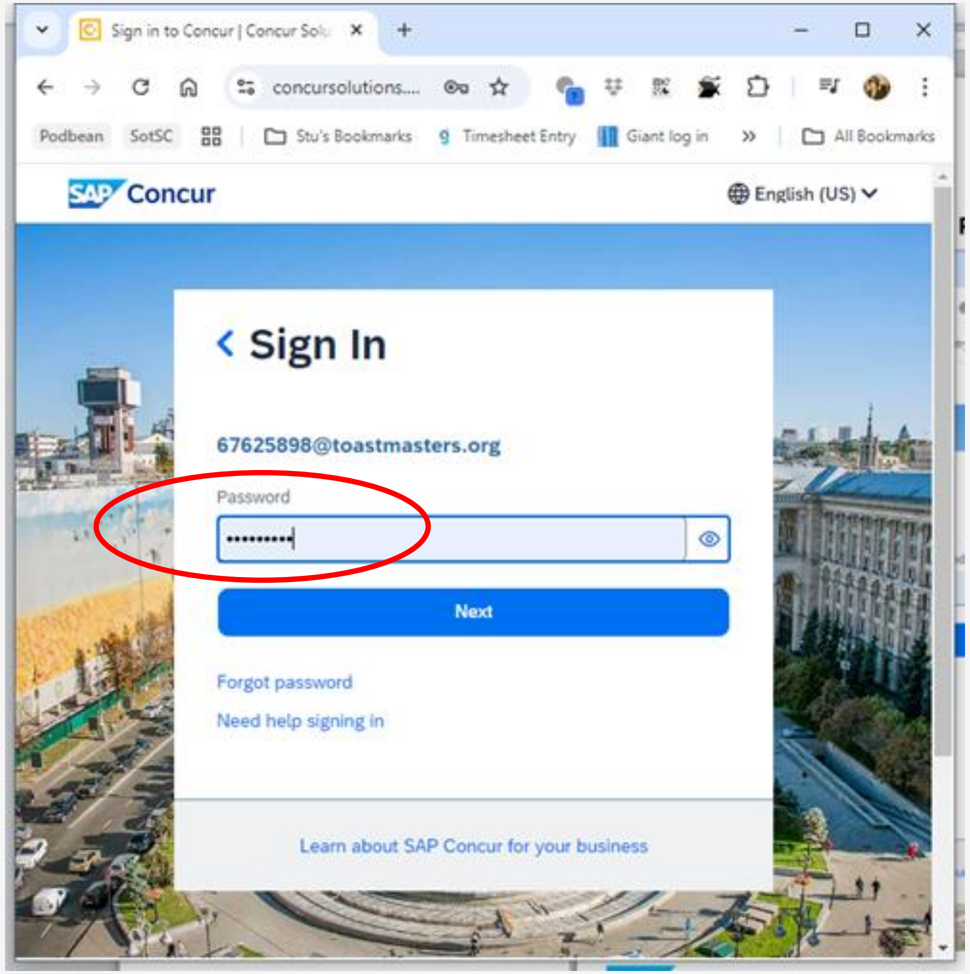
If your Member ID is only 7 digits, then add a leading '0'.

For example:

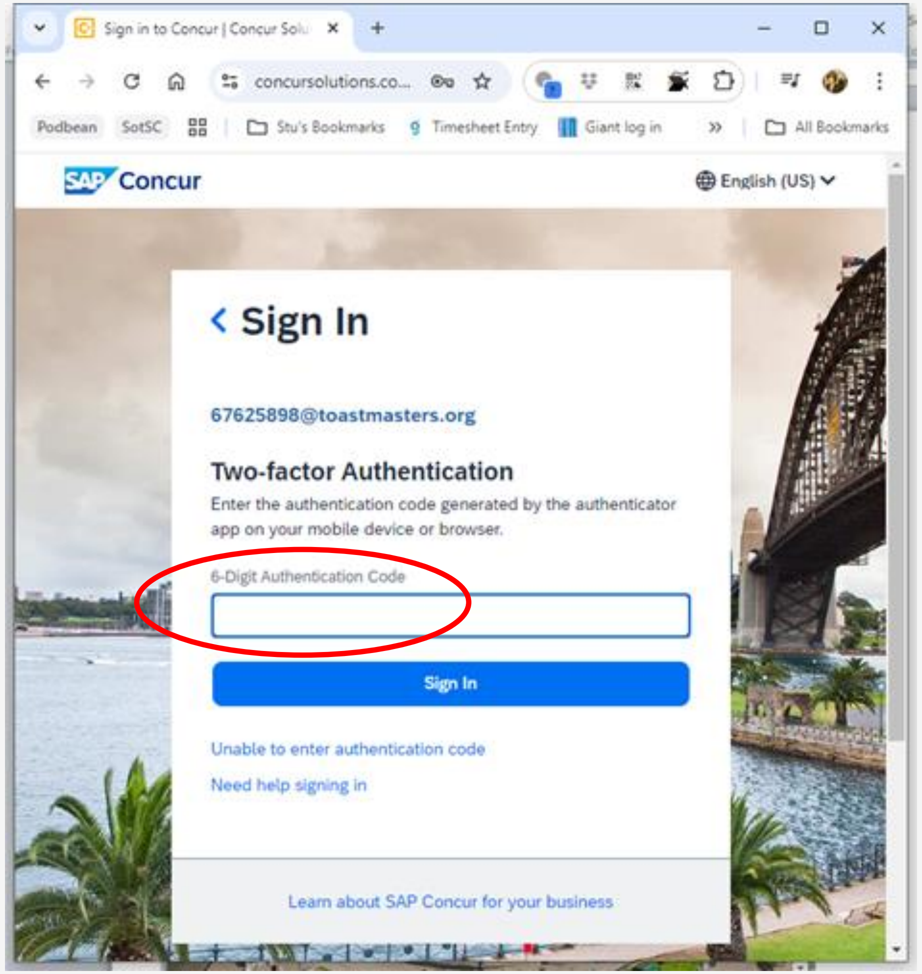
01234567@toastmasters.org

Login

Enter Your Password



Two-Factor Authentication – enter the authentication code



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

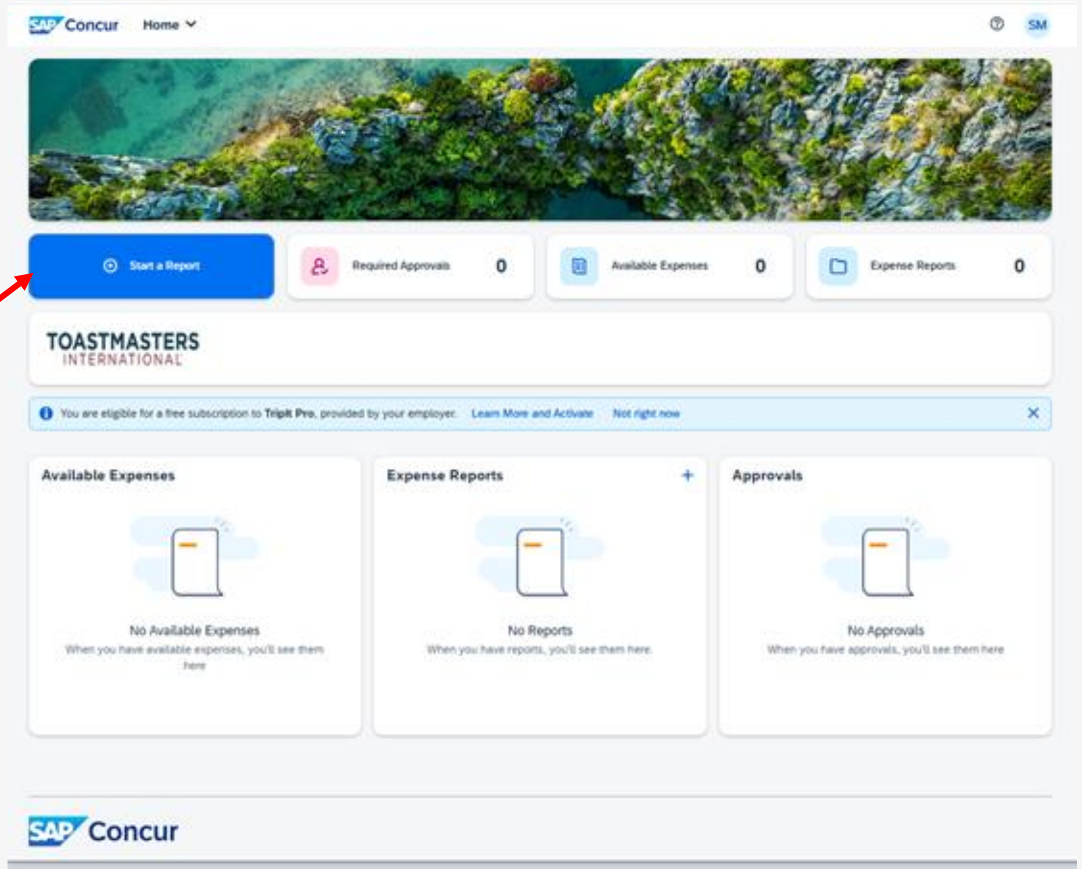
1. Click on **START A REPORT**
2. Next enter a **REPORT NAME** in the following format: **XX-D91-YYYYMM - Description**
   Where **XX** = your initials, **YYYY** = Year, **MM** = Month & **Description** = Reason for Expense

   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

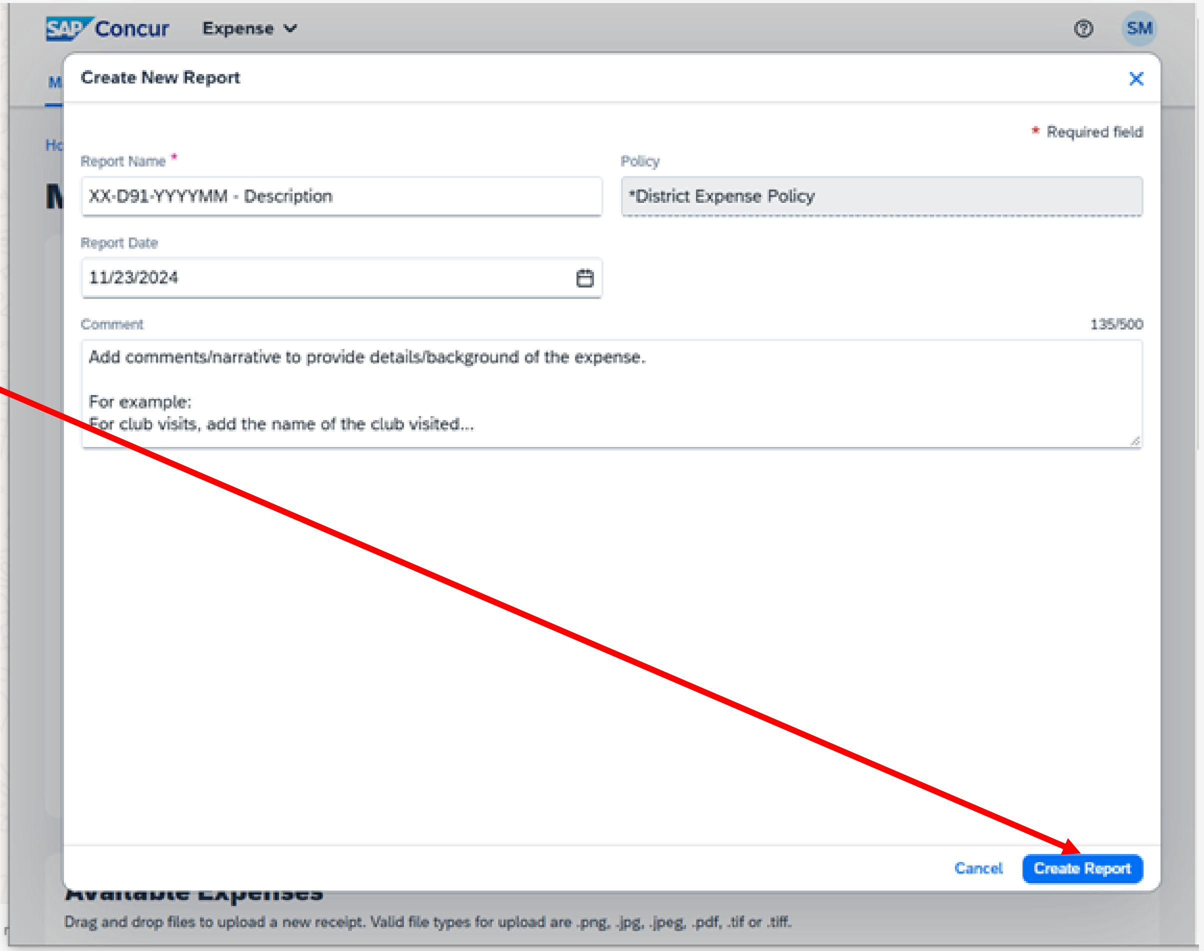
Add details and select 'Create Report'.

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)

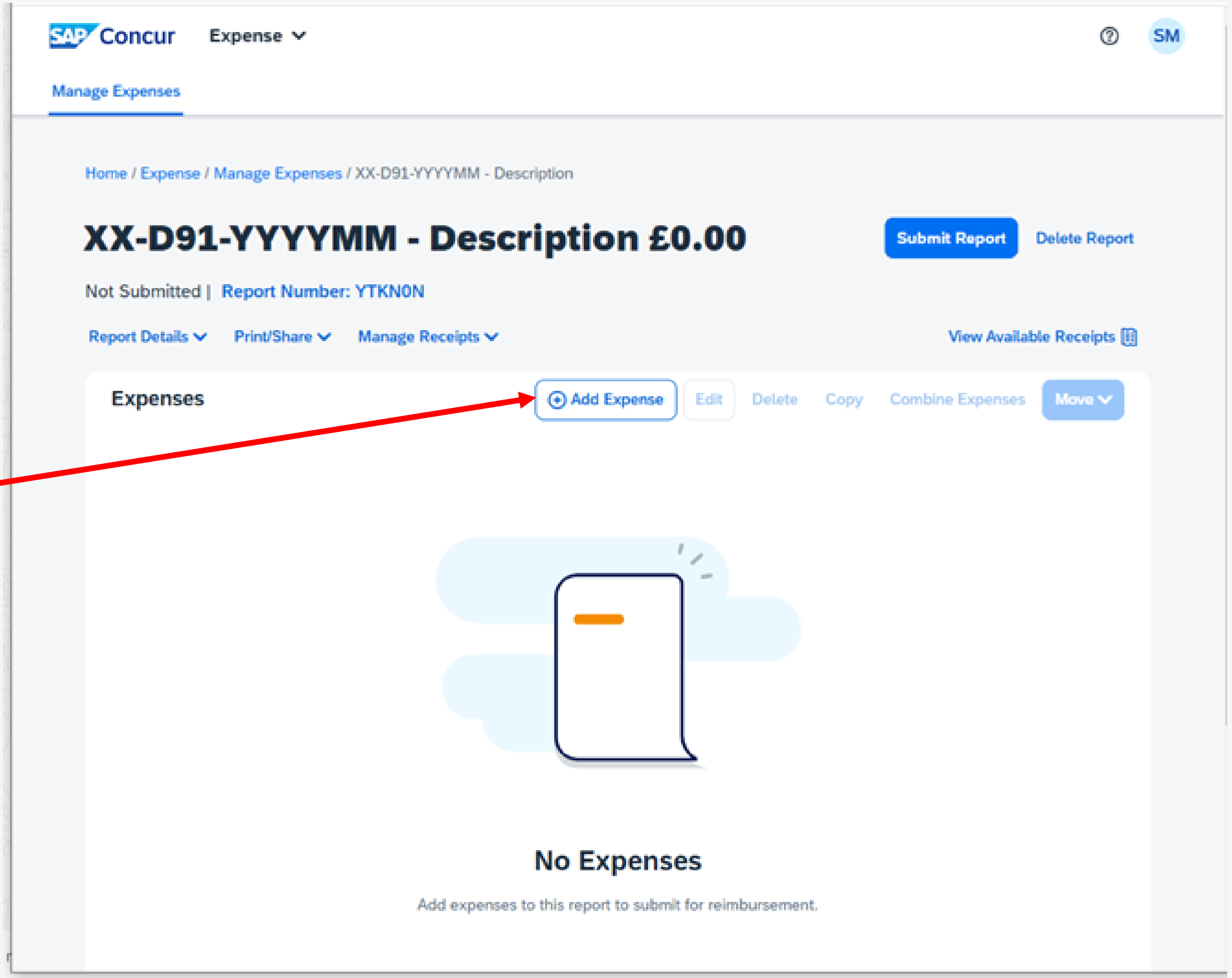


Note: The Report Name must be entered in the specified format otherwise the claim will be automatically rejected

Submitting a Mileage Expense Claim: Step 3

Add Expense(s)

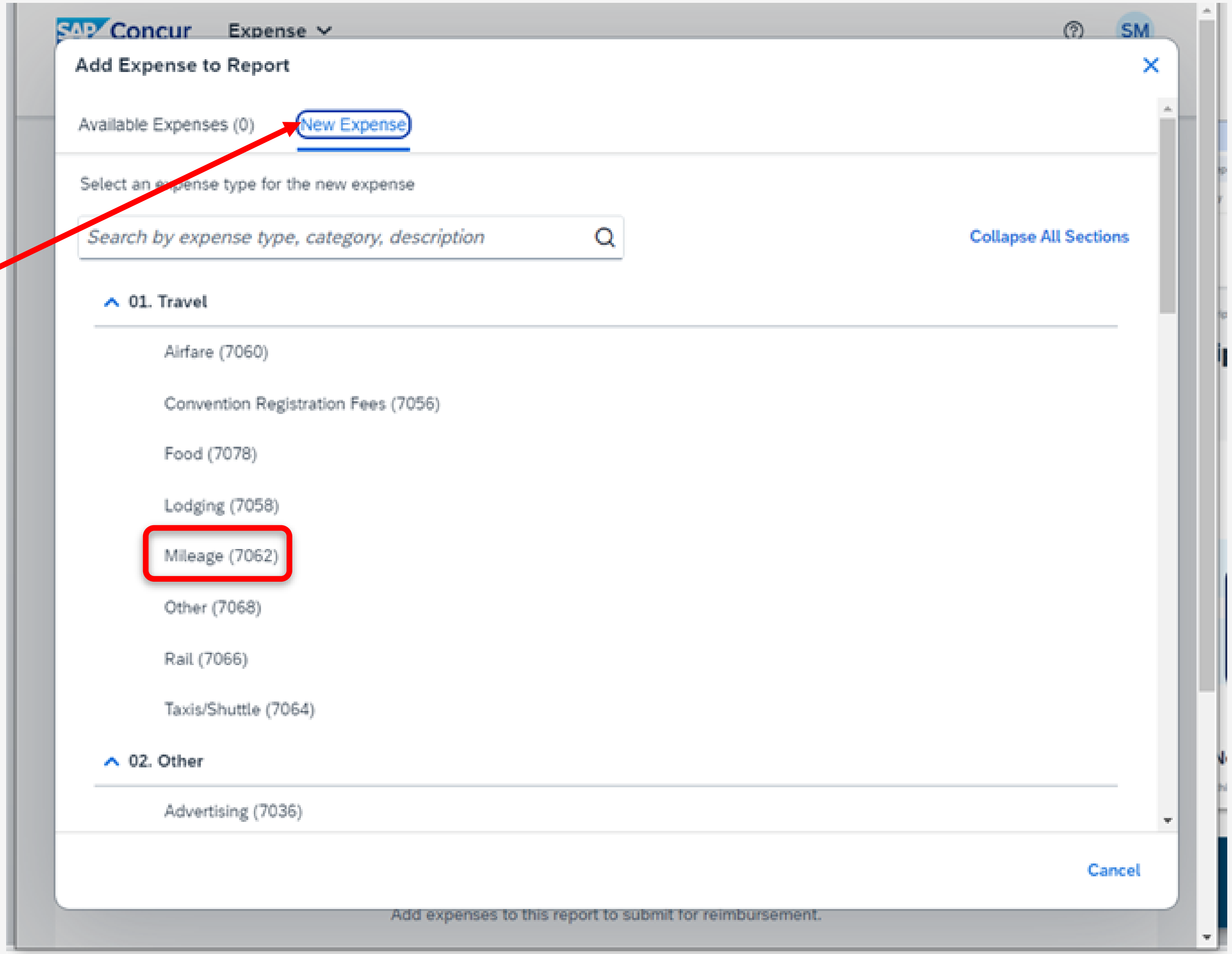
Click ‘Add Expense’



Submitting a Mileage Expense Claim: Step 4

Add Expense to Report

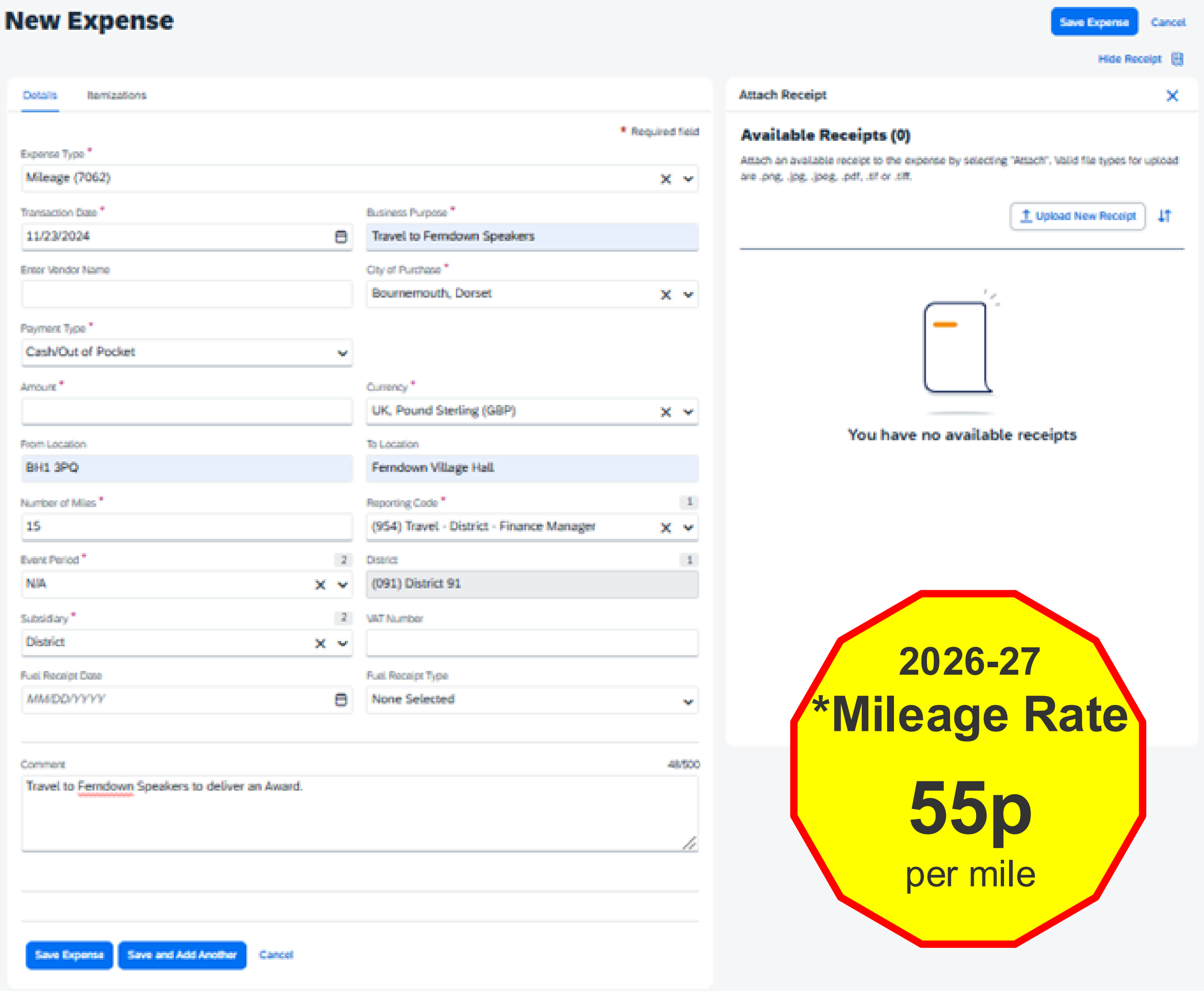
Select 'New Expense' and choose the expense type 'Mileage (7062)'



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



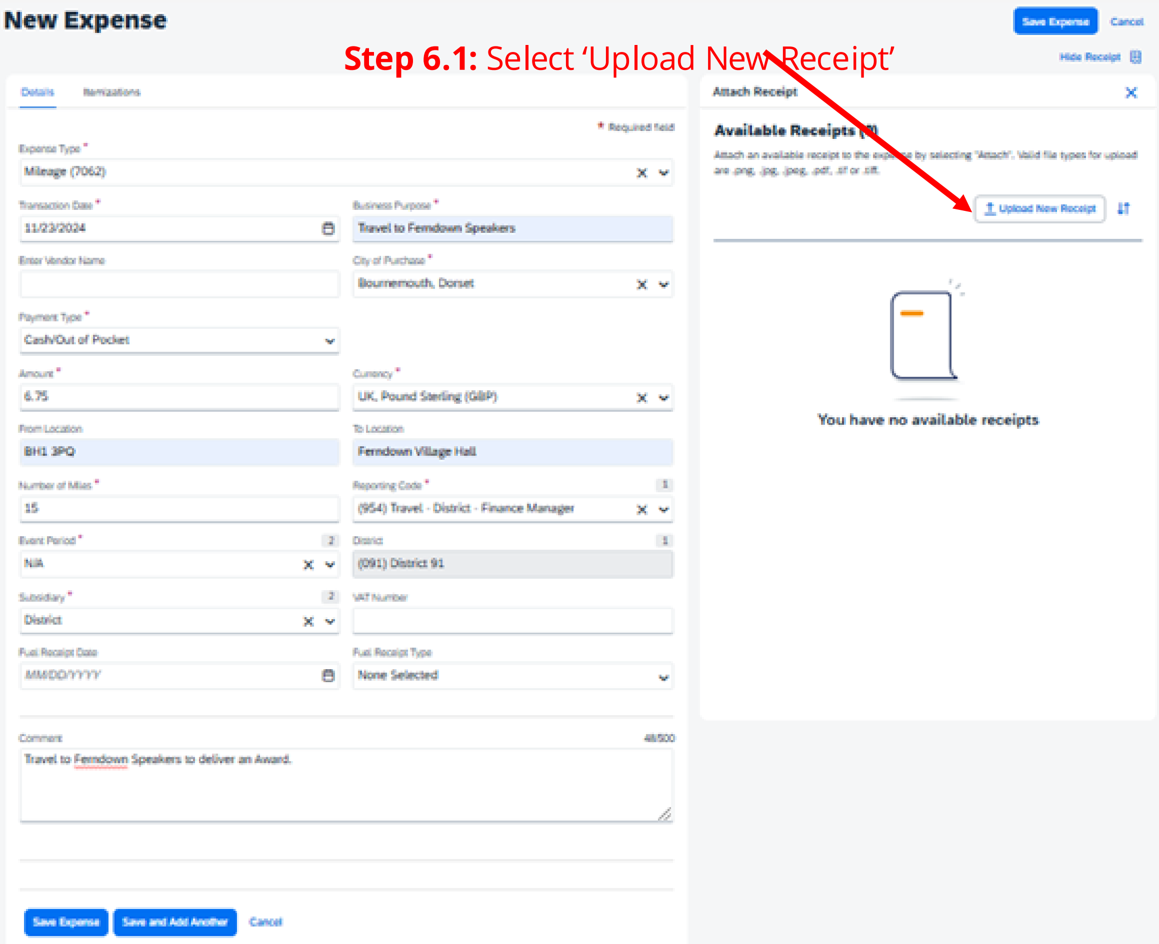
2026-27
***Mileage Rate**
55p
per mile

Submitting a Mileage Expense Claim: Step 6

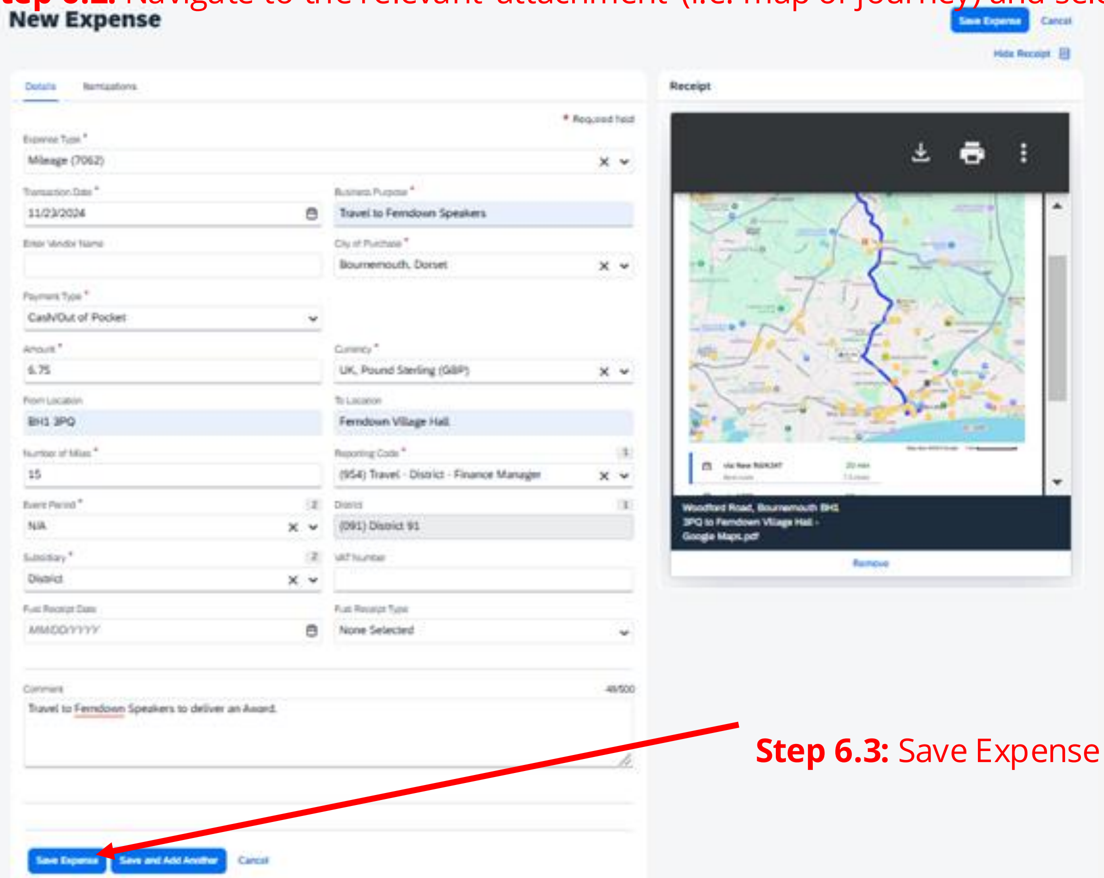
Attach Receipt

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

Step 6.1: Select 'Upload New Receipt'



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



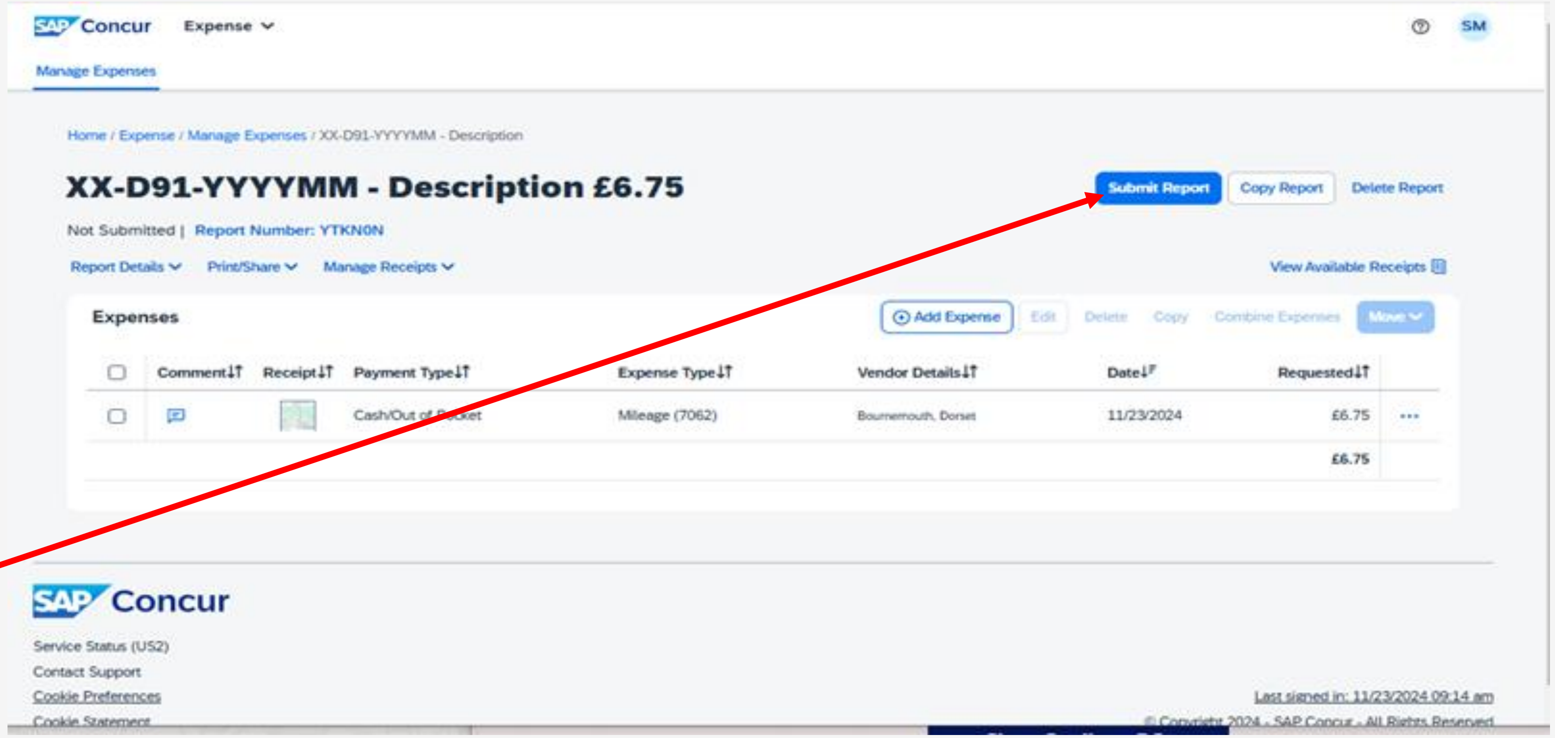
Step 6.3: Save Expense

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.

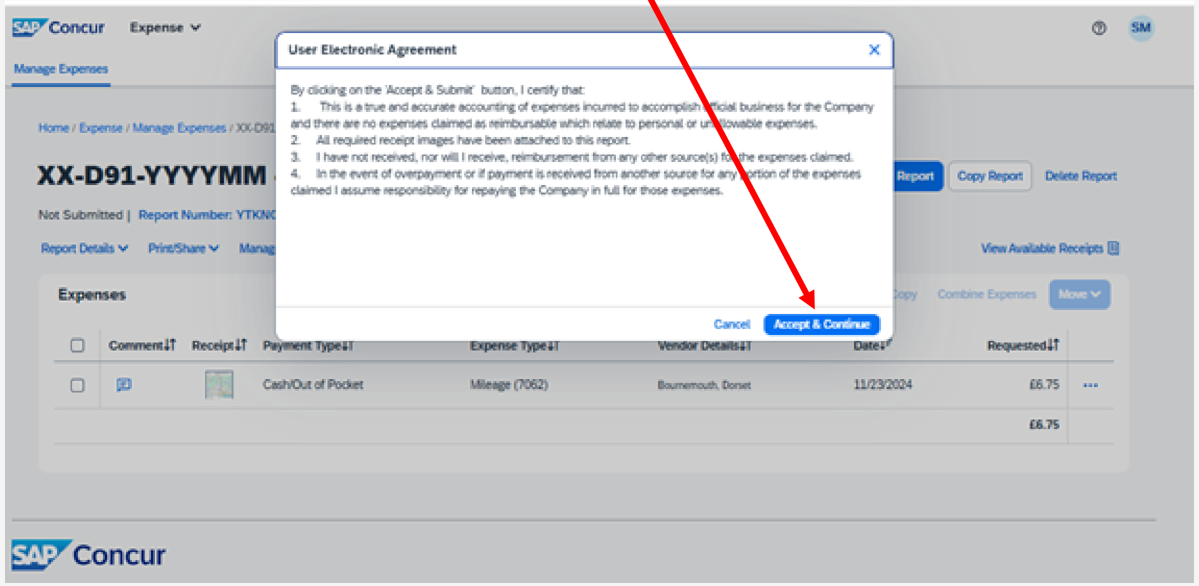
NO! Then you are ready to 'Submit the Report' for approval *(and move on to step 8).*



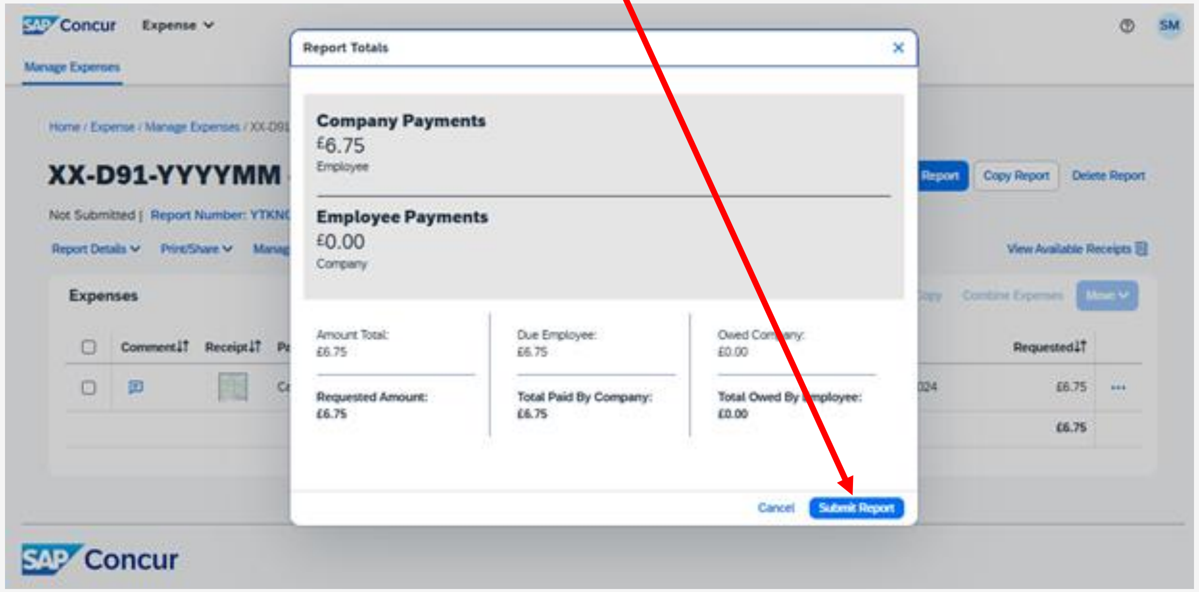
Submitting a Mileage Expense Claim: Step 8

User Agreement Acceptance & Final Submission

Step 8.1: Select ‘Accept & Continue’



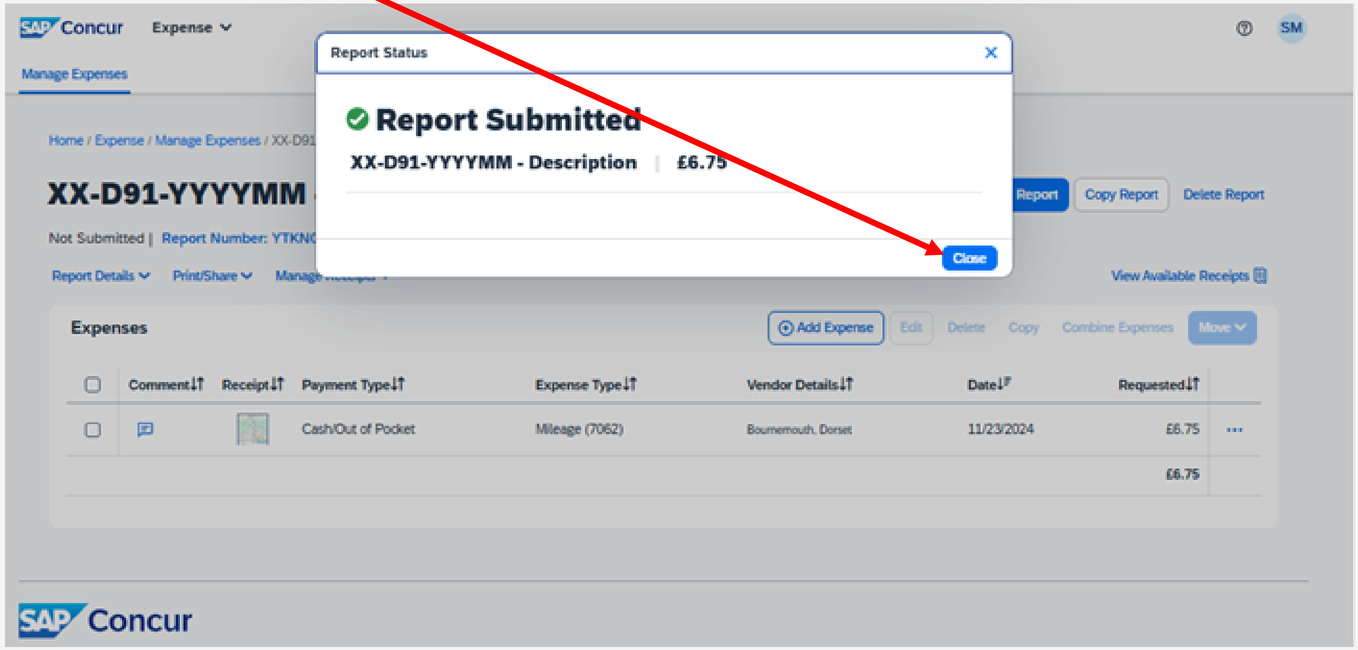
Step 8.2: Select ‘Submit Report’



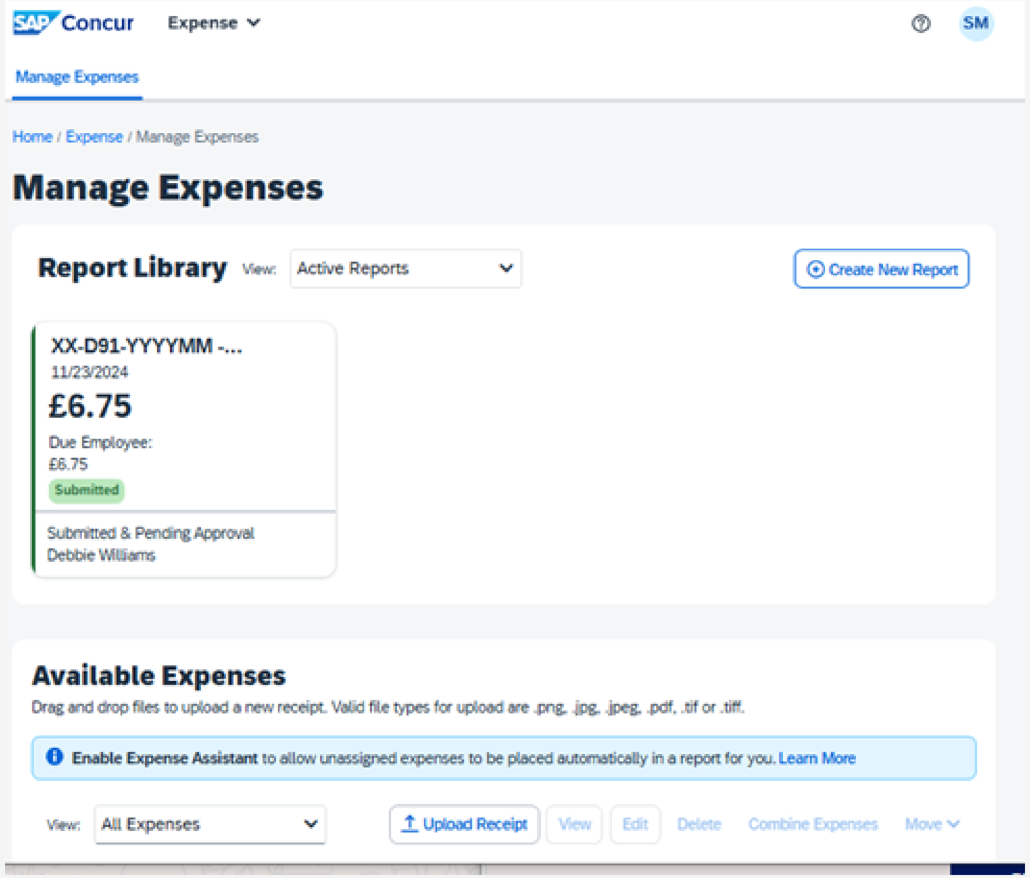
Submitting a Mileage Expense Claim: Step 9

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

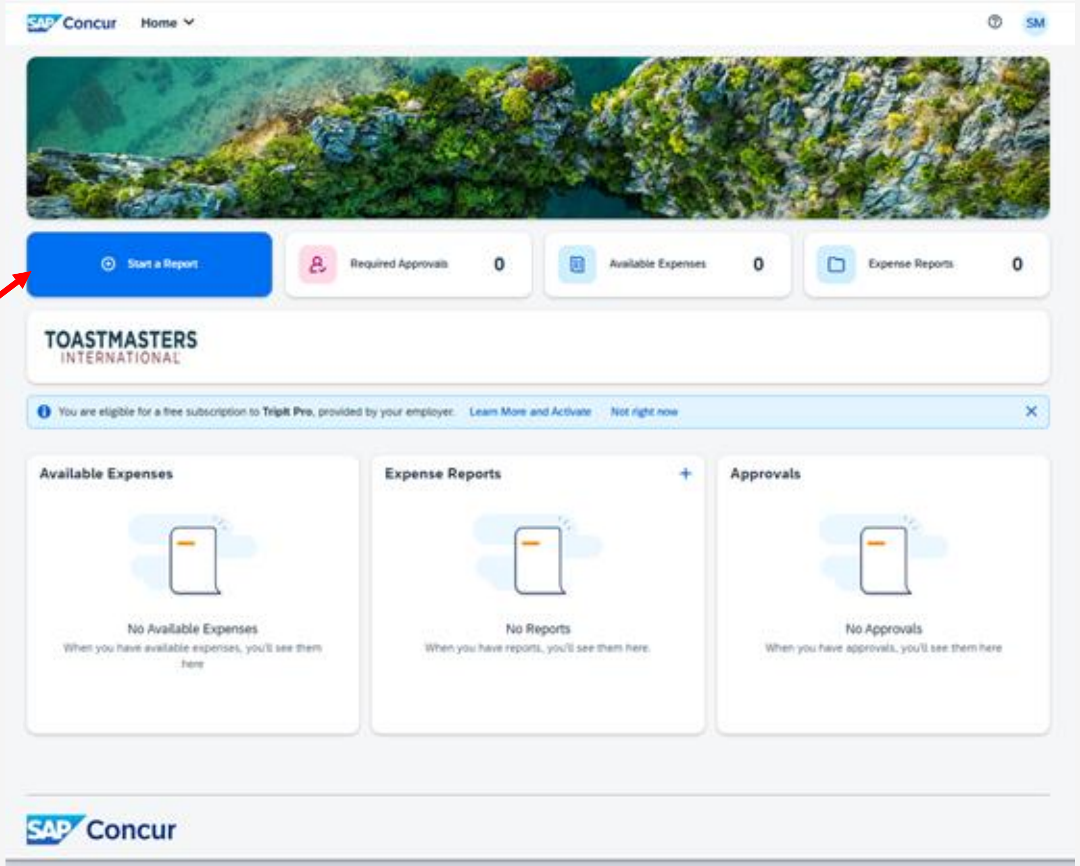
   For example - a 'Great Golden Quarter' claim Report Name **= SM-D91-202411-Incentive-GGQ**
3. **ADD EXPENSE**
   - Complete all required fields (including descriptions)
   - Upload/attach both (i) the Incentive Voucher AND (ii) the receipt/invoice for the expense you are claiming against

     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

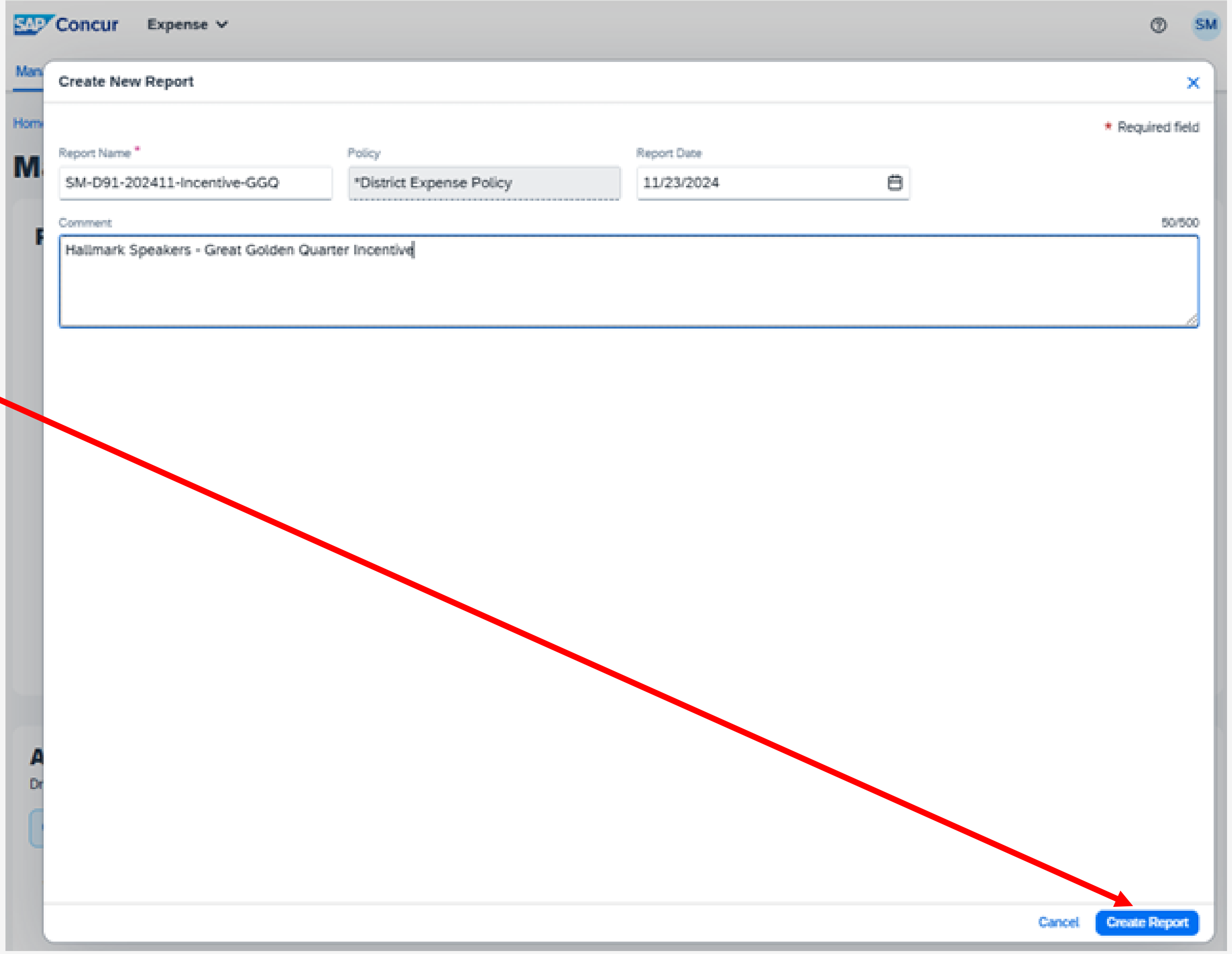
Add details and select 'Create Report'.

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

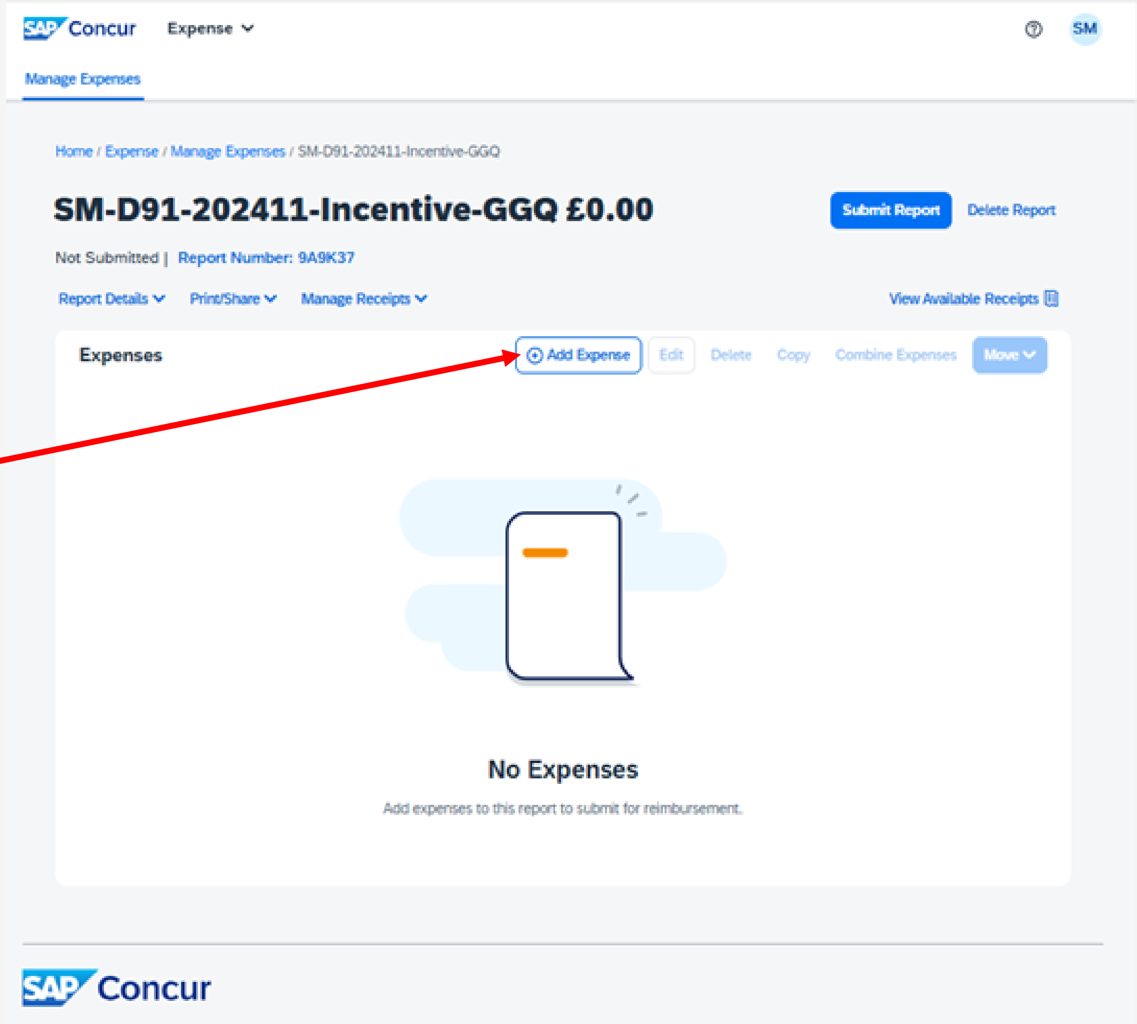


Note: The Report Name must be entered in the specified format as outlined on this page otherwise the claim will be automatically rejected

Submitting a Claim for a District Incentive: Step 3

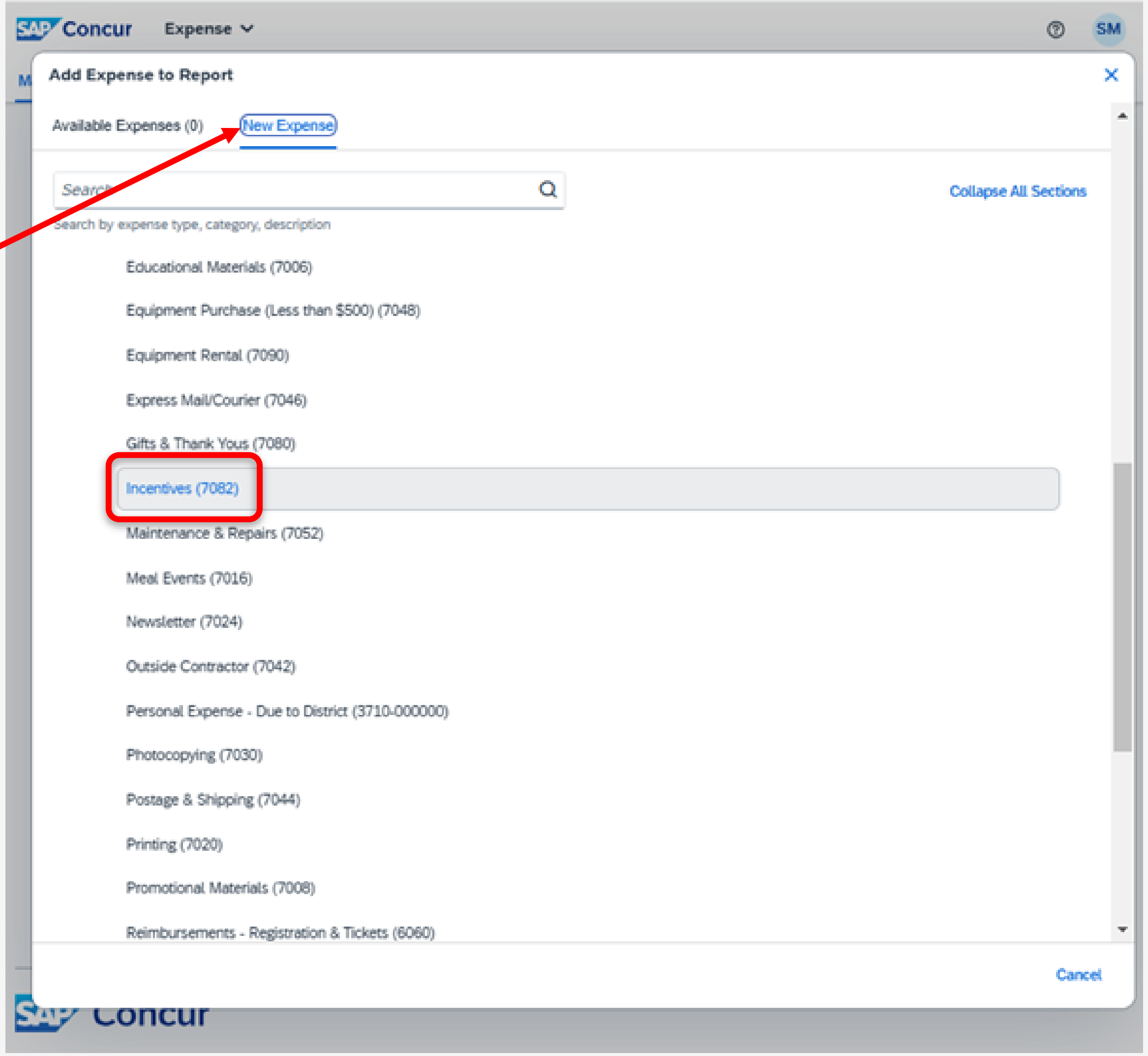
Add Incentive Claim ('Expense')

Click 'Add Expense'



Submitting a Claim for a District Incentive: Step 4

Add Incentive Claim ('Expense') to Report

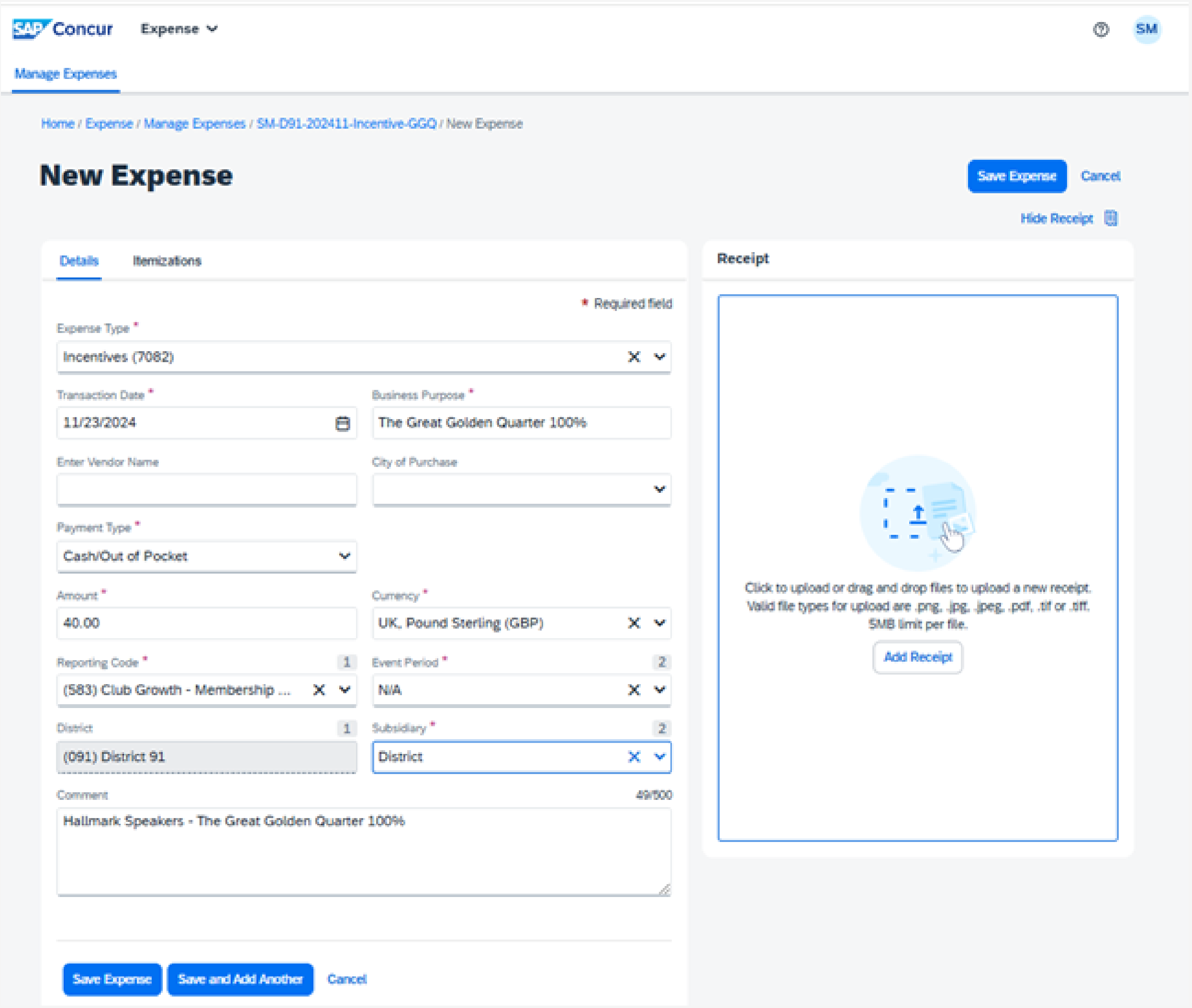


Select 'New Expense' and choose the expense type 'Incentives (7082)'

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



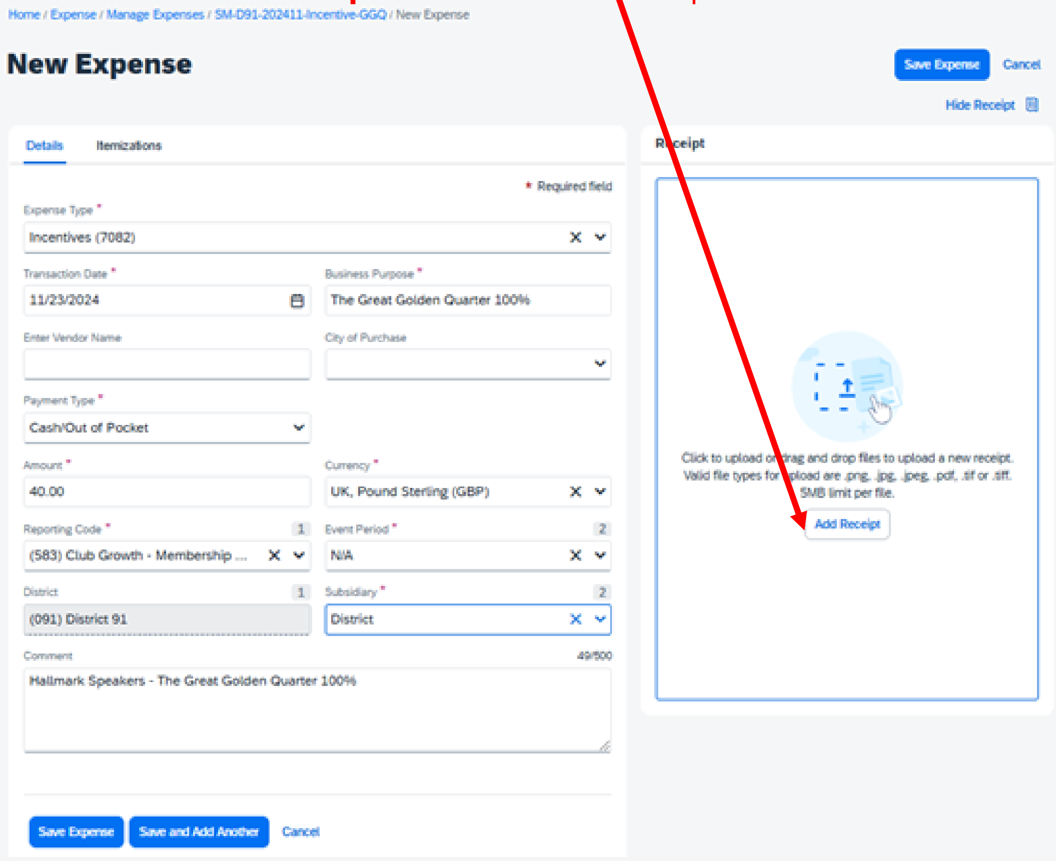
Note: The Business Purpose & Reporting Code must be entered as listed on page 65 otherwise the claim will be automatically rejected

Submitting a Claim for a District Incentive: Step 6

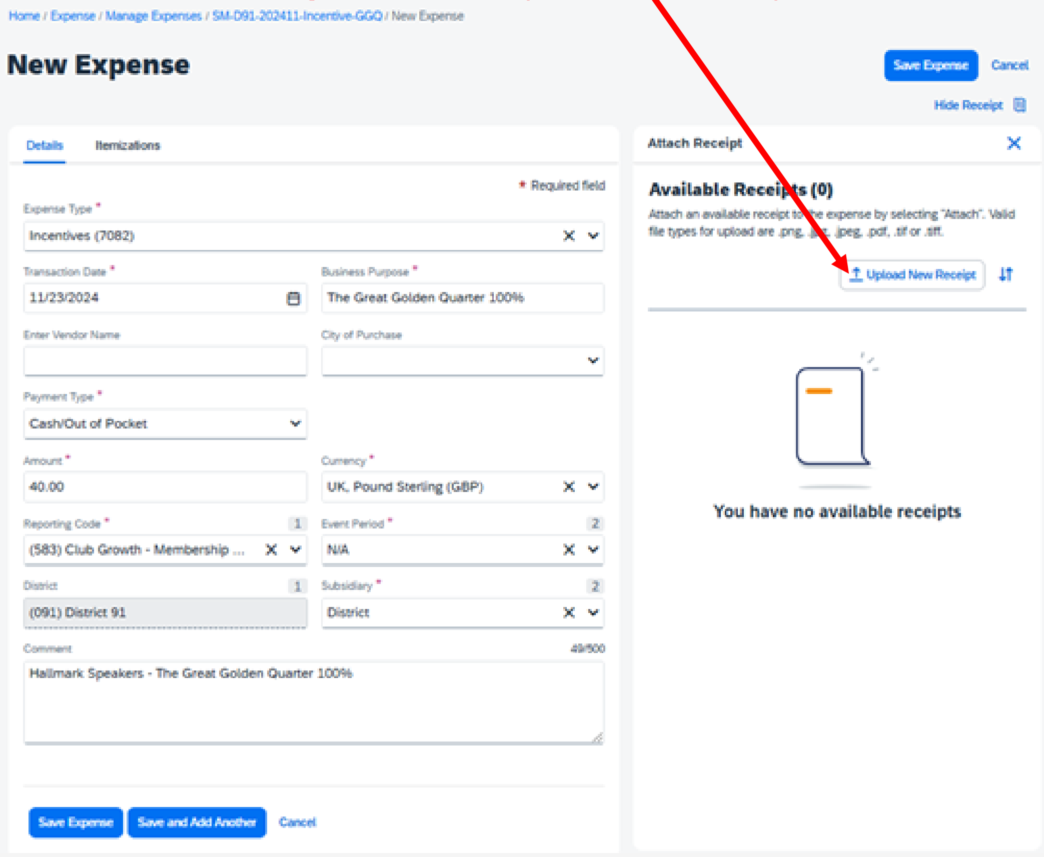
Attach Receipts

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'



Step 6.2: Select 'Upload New Receipt'



Submitting a Claim for a District Incentive: Step 6

Attach Receipts

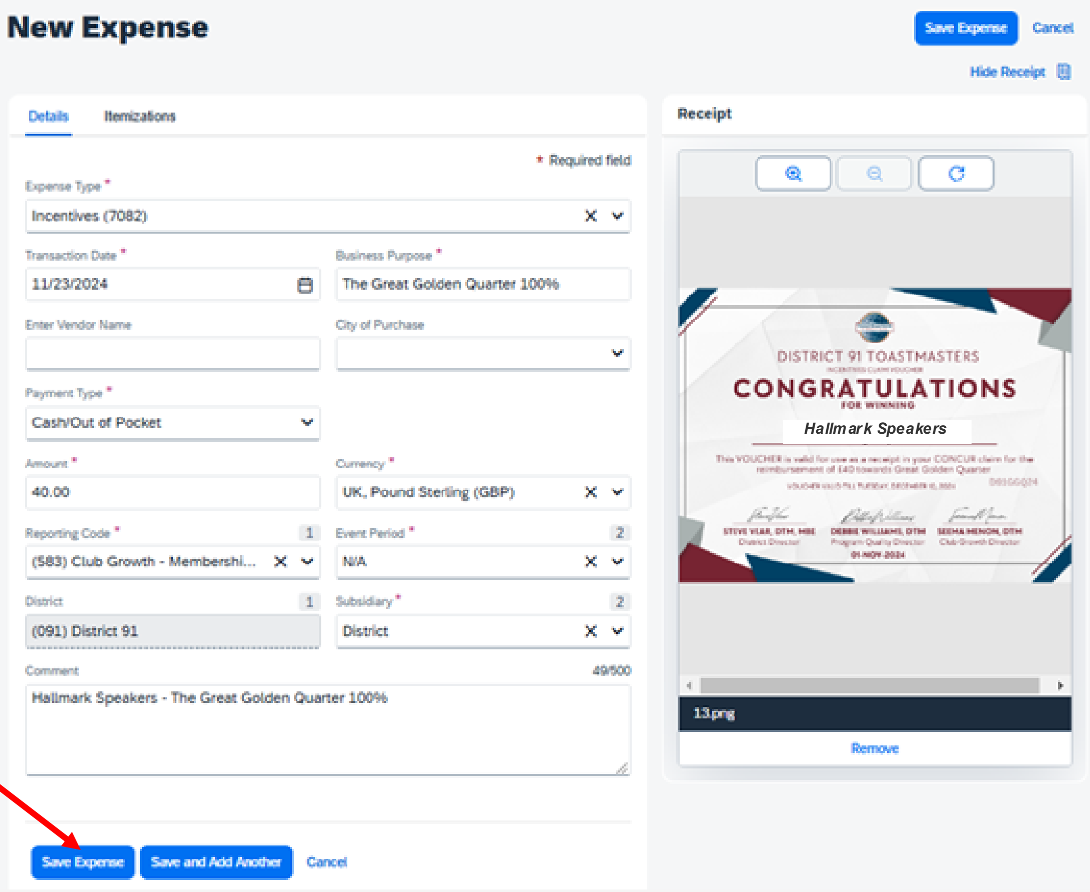
Note: District Incentives require 2 'receipts' to be attached *(otherwise the claim will be immediately rejected)*:

(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.

Step 6.4: Save Expense

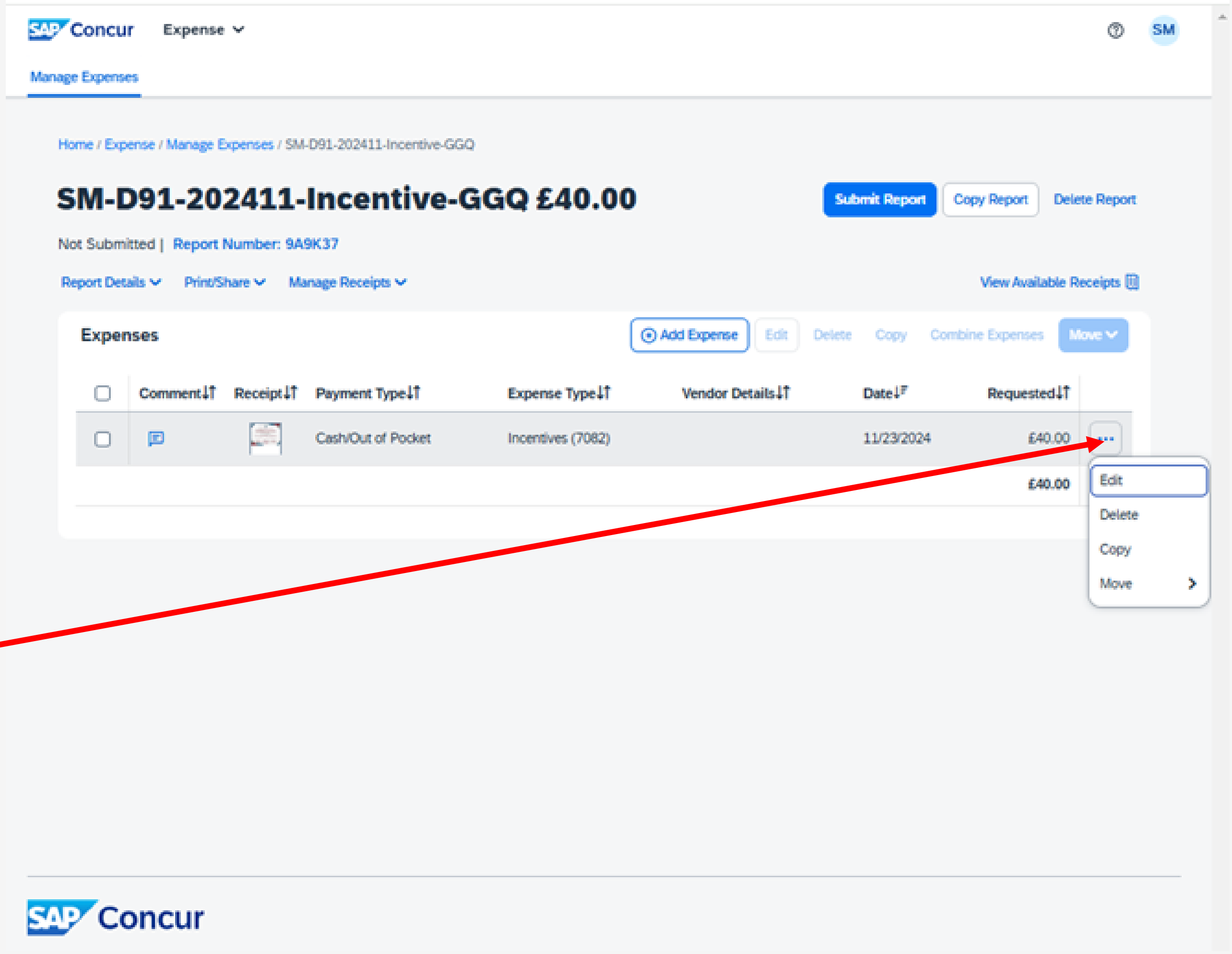


Submitting a Claim for a District Incentive: Step 6

Edit Expense

In order to attach Receipt #2

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



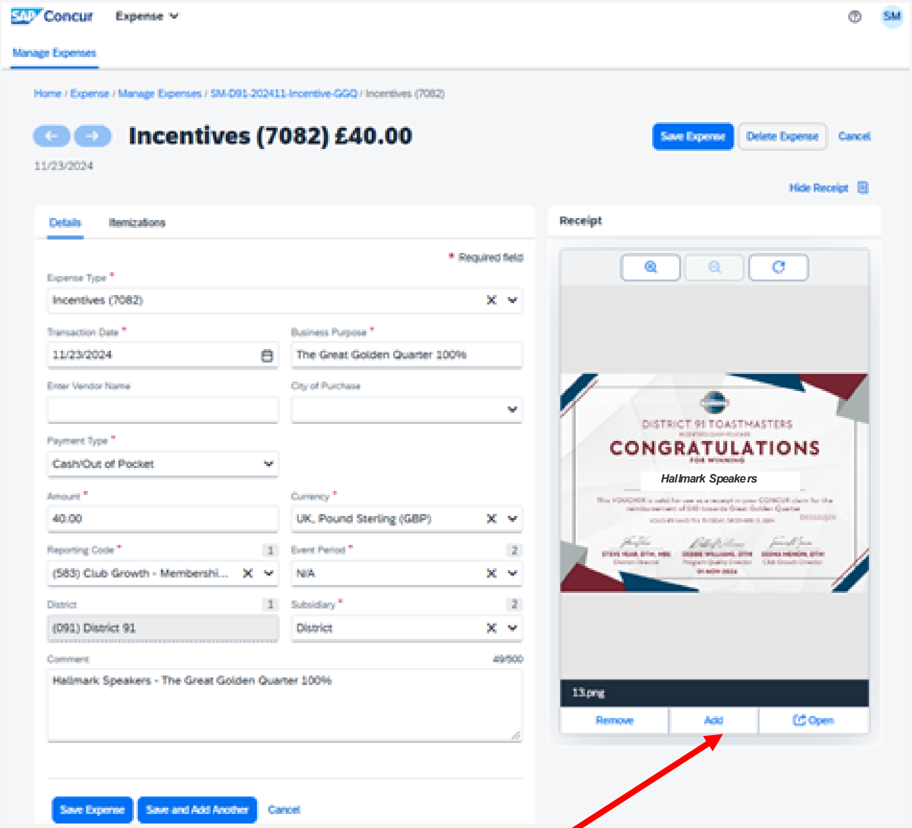
Step 6.5: Edit Expense

Click on the '…' & select 'Edit'

Submitting a Claim for a District Incentive: Step 6

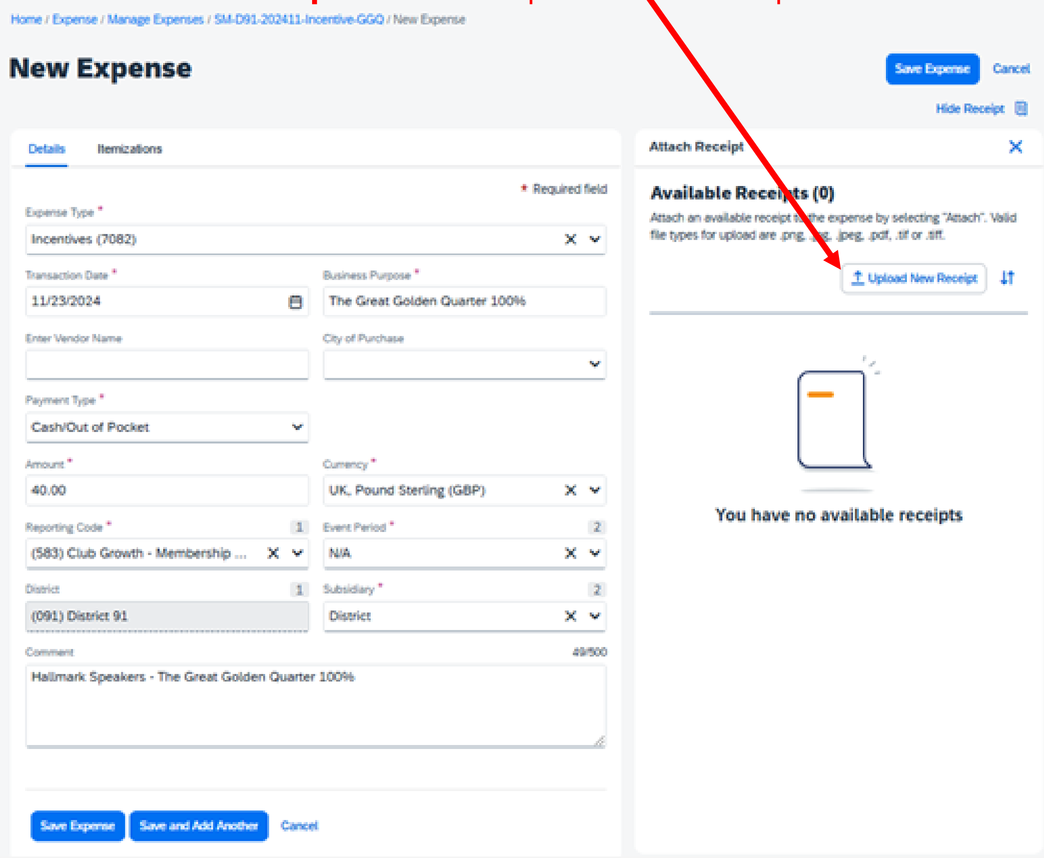
Attach Receipts

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.



Step 6.6: Add a 2nd Receipt

Step 6.7: Select 'Upload New Receipt'



Submitting a Claim for a District Incentive: Step 6

Attach Receipts

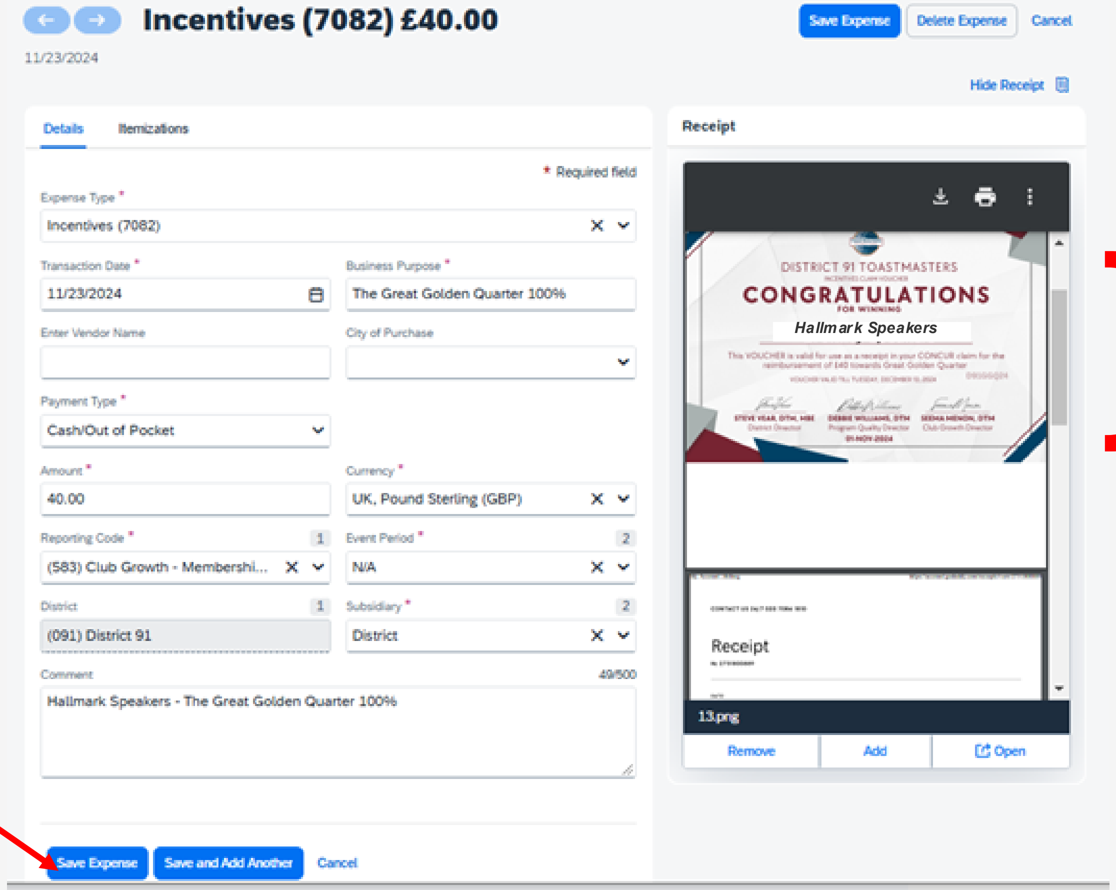
Note: District Incentives require 2 'receipts' to be attached *(otherwise the claim will be immediately rejected)*:
(i) The incentive voucher and (ii) the receipt/invoice for the expense being claimed against.

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



Receipt #1:

The incentive voucher

Receipt #2:

The receipt/invoice for the expense being claimed against.

* FINAL CHECK *

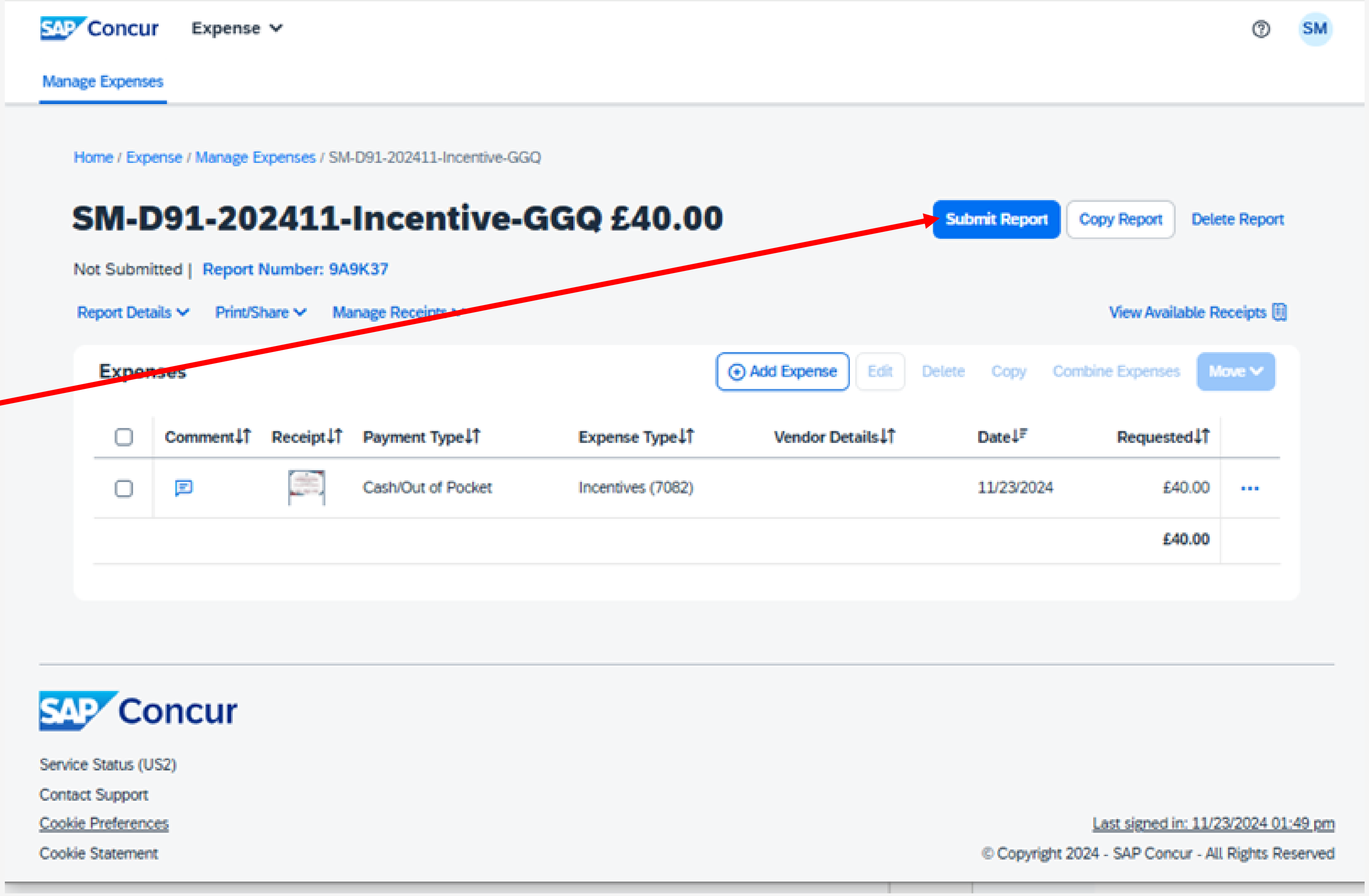
Check both of the required 'receipts' are attached *(otherwise the claim will be immediately rejected)*.

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!

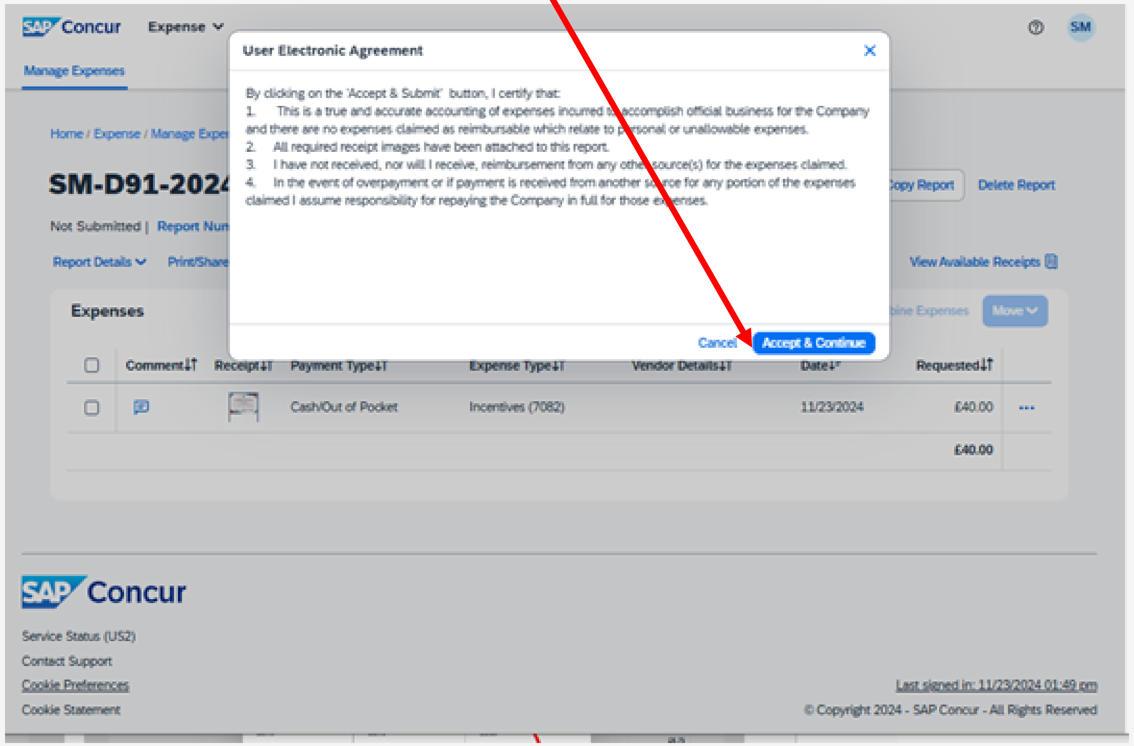
Note: *District Incentive claims should contain a single expense line only.*



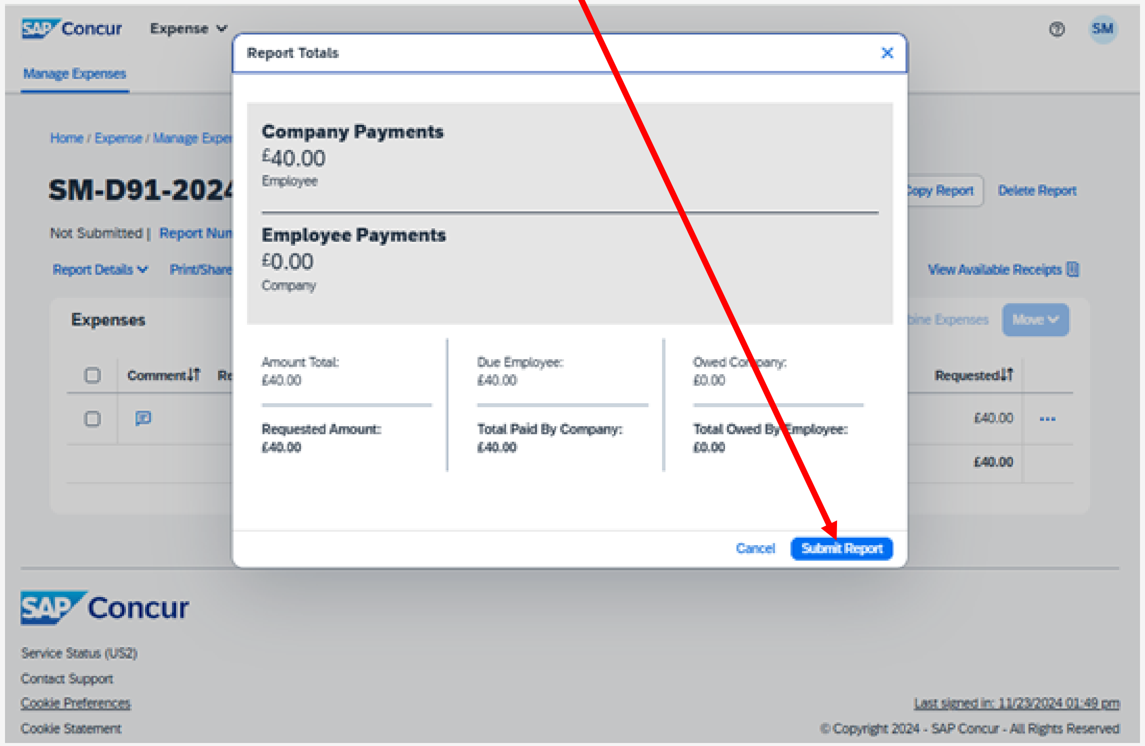
Submitting a Claim for a District Incentive: Step 8

User Agreement Acceptance & Final Submission

Step 8.1: Select 'Accept & Continue'



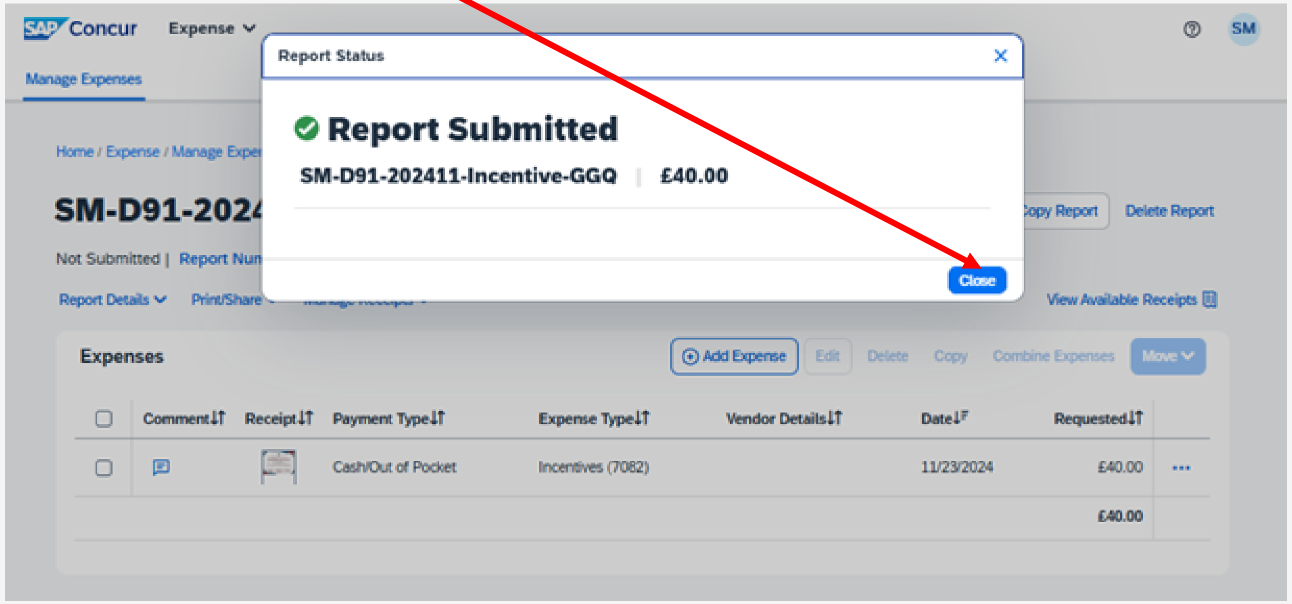
Step 8.2: Select 'Submit Report'



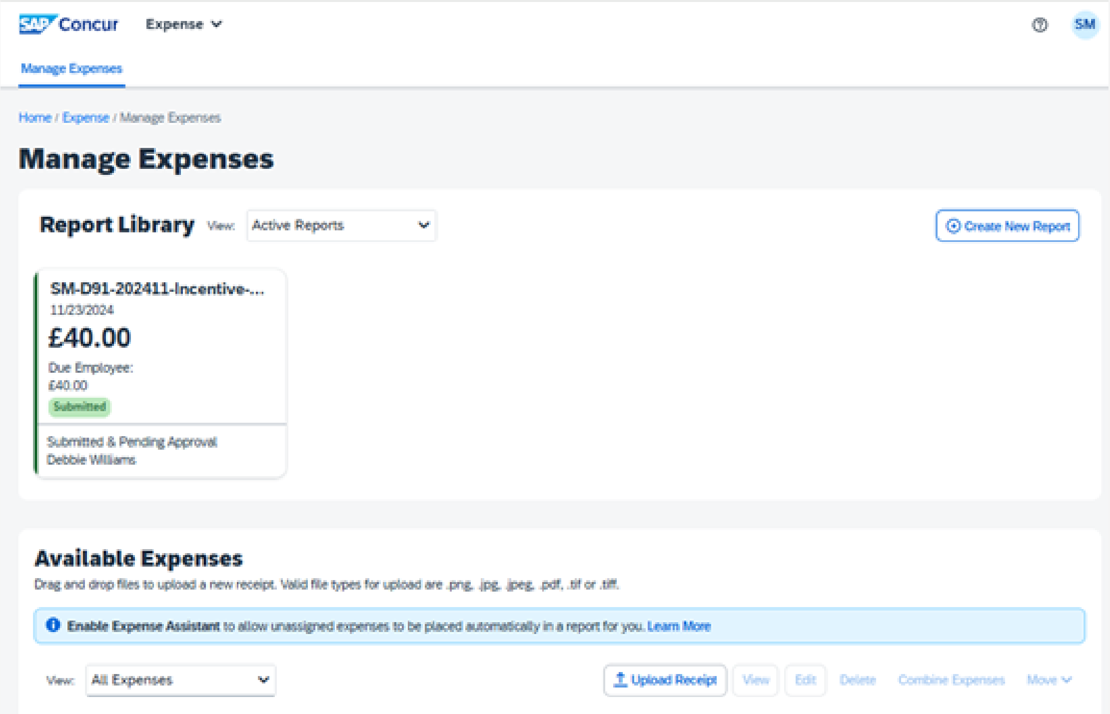
Submitting a Claim for a District Incentive: Step 9

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

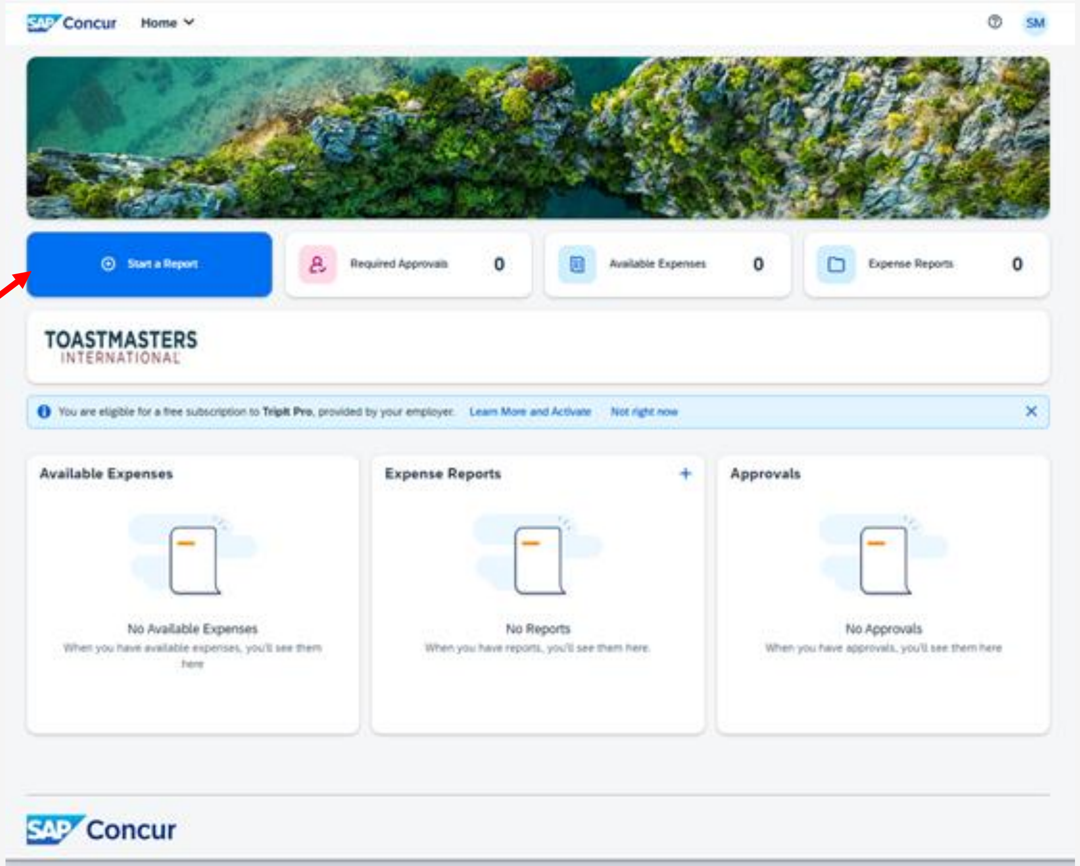
Notes

- 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:

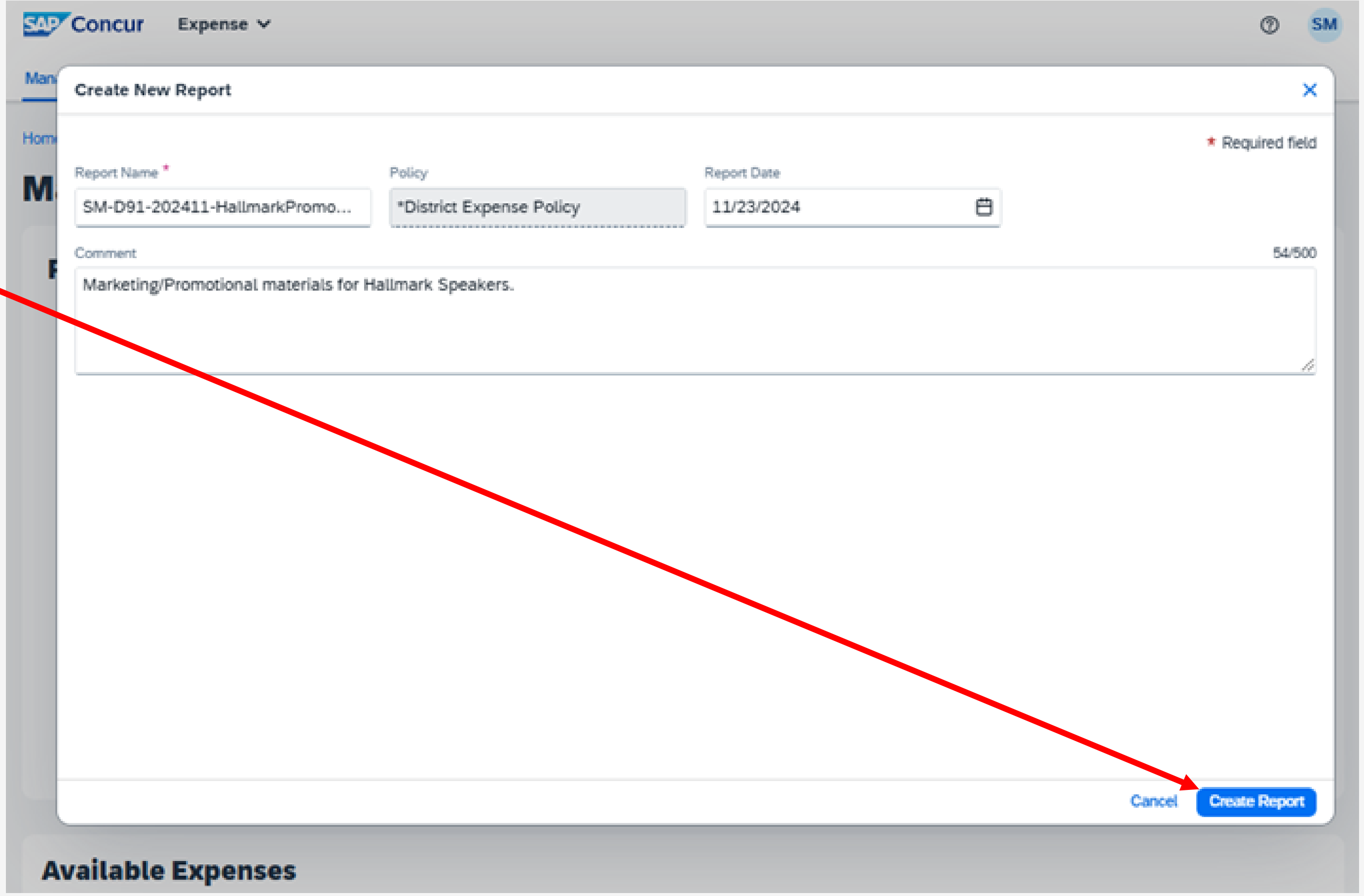
  XX-D91-YYYYMM-Description

  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)

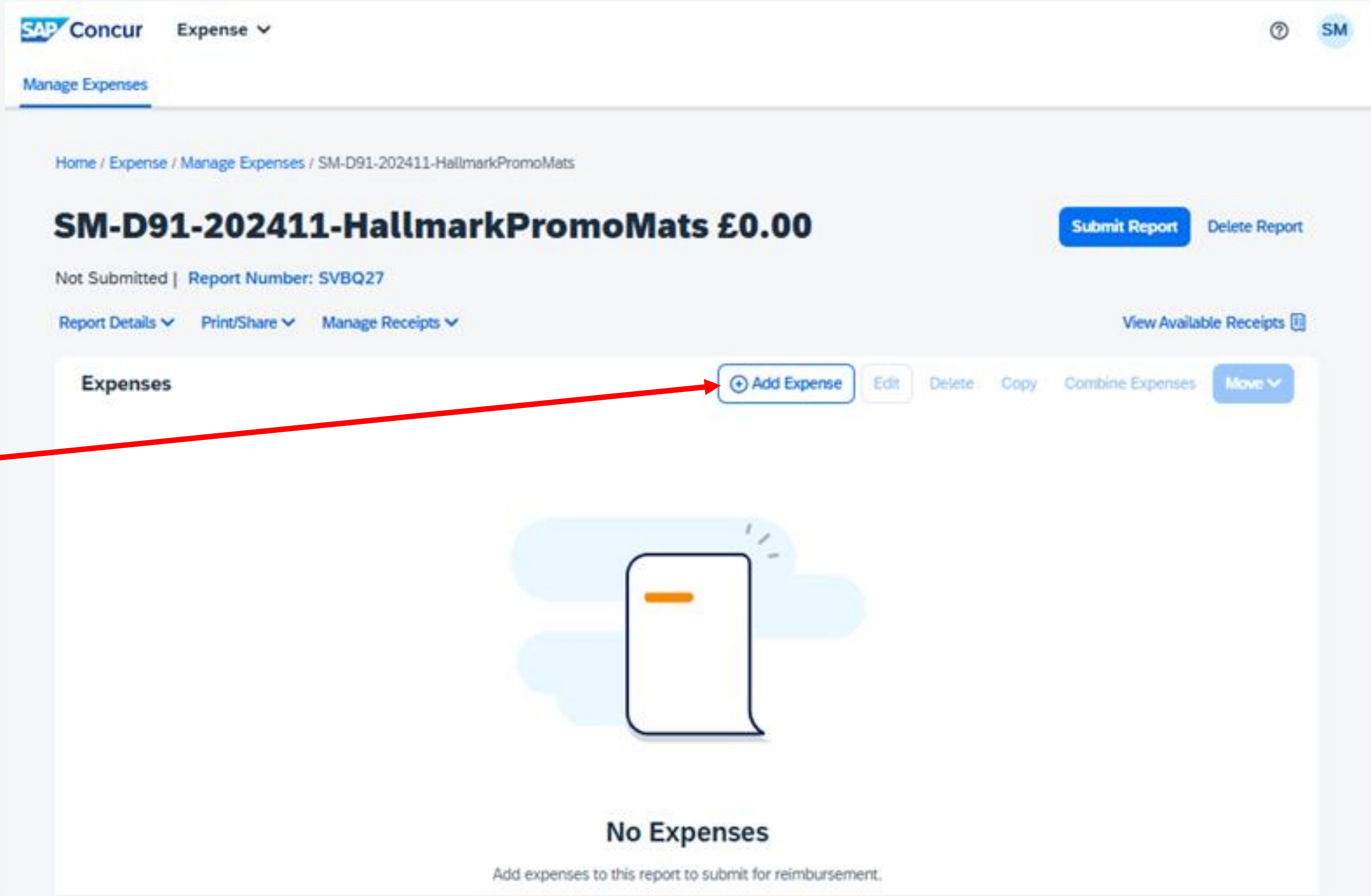


<u>Note</u>: The Report Name must be entered in the specified format otherwise the claim will be automatically rejected

Submitting a Misc. Expense Claim: Step 3

Add Expense(s)

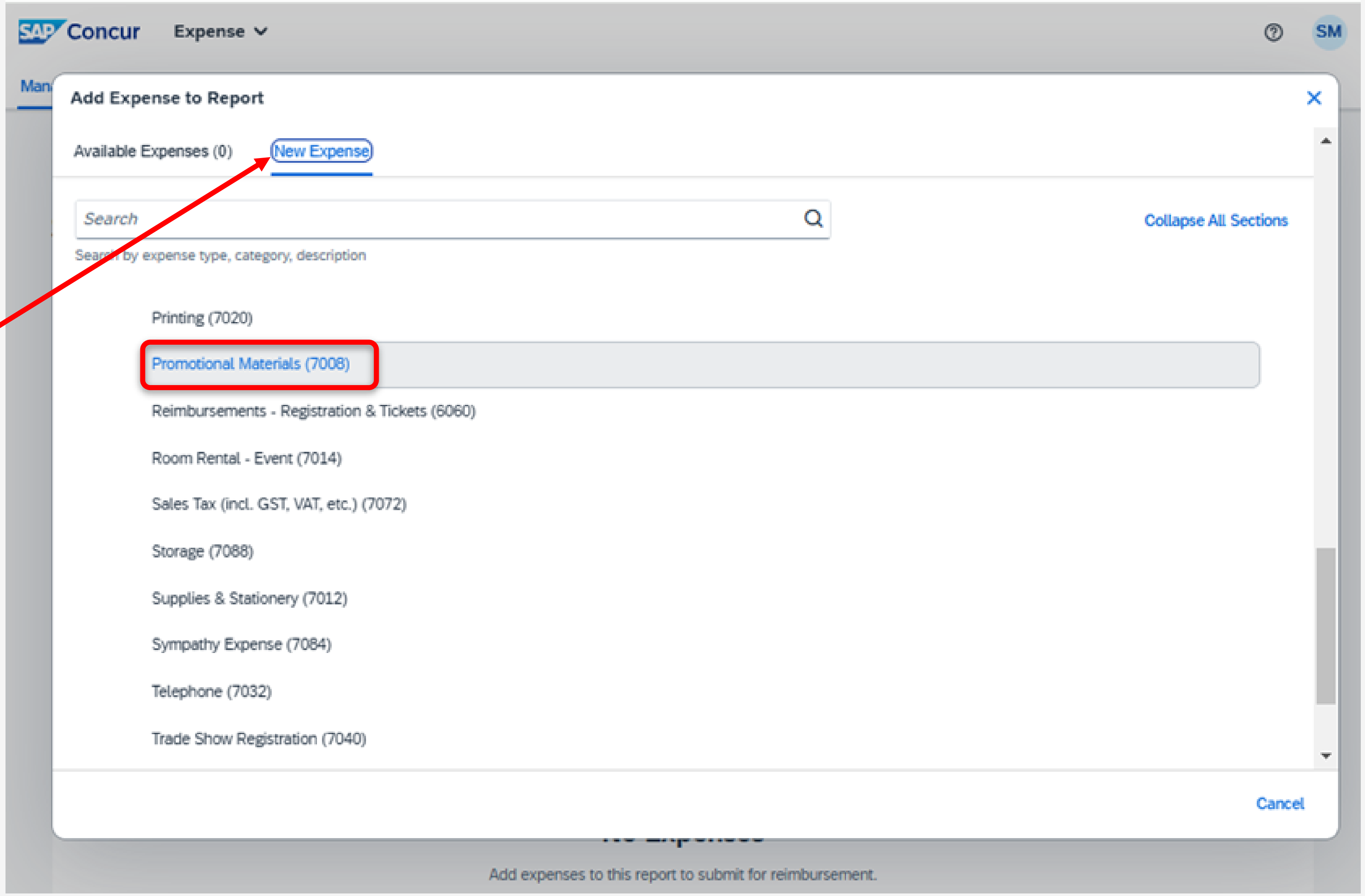
Click 'Add Expense'



Submitting a Misc. Expense Claim: Step 4

Add Expense to Report

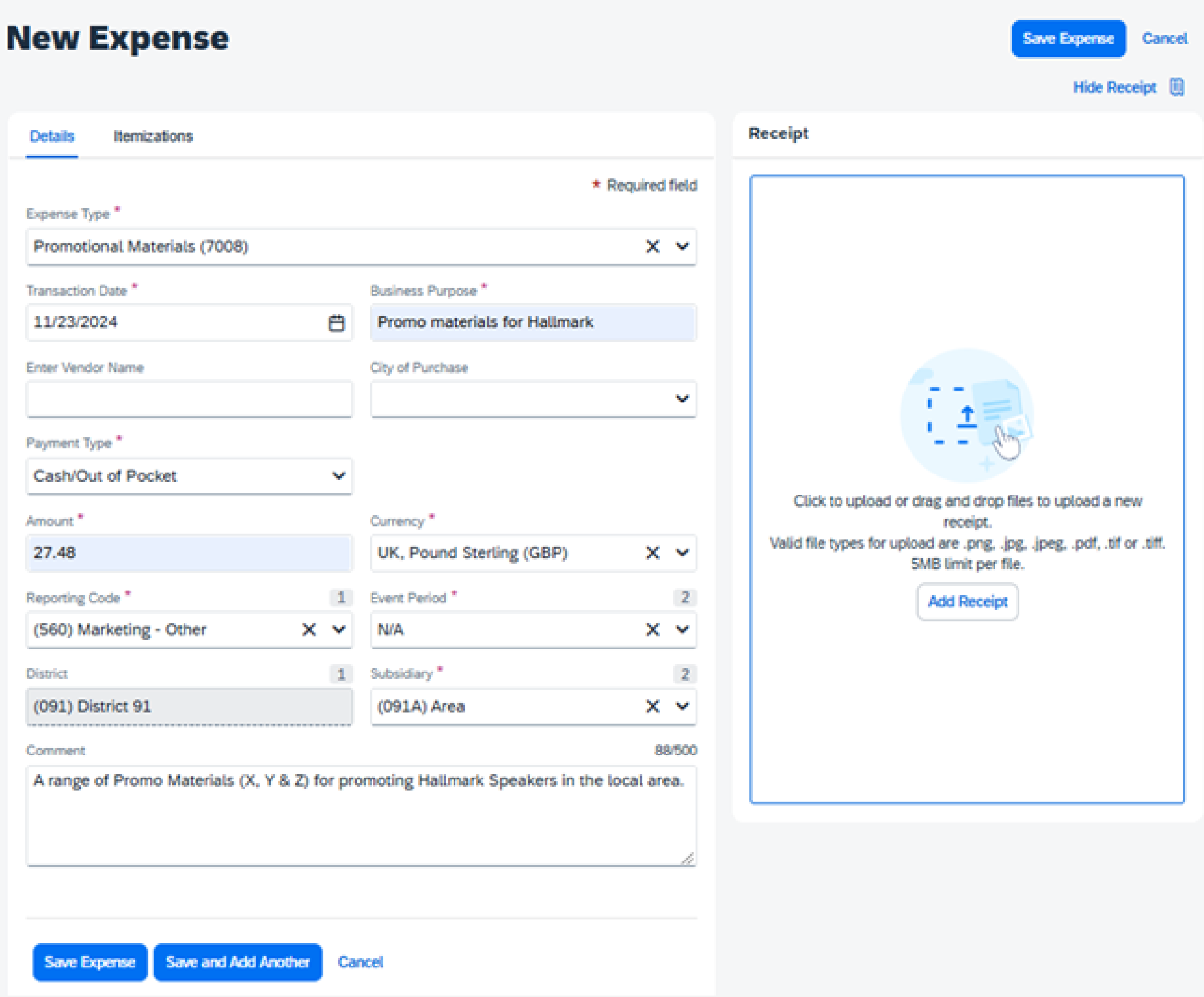
Select 'New Expense' and choose the relevant expense type...



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



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

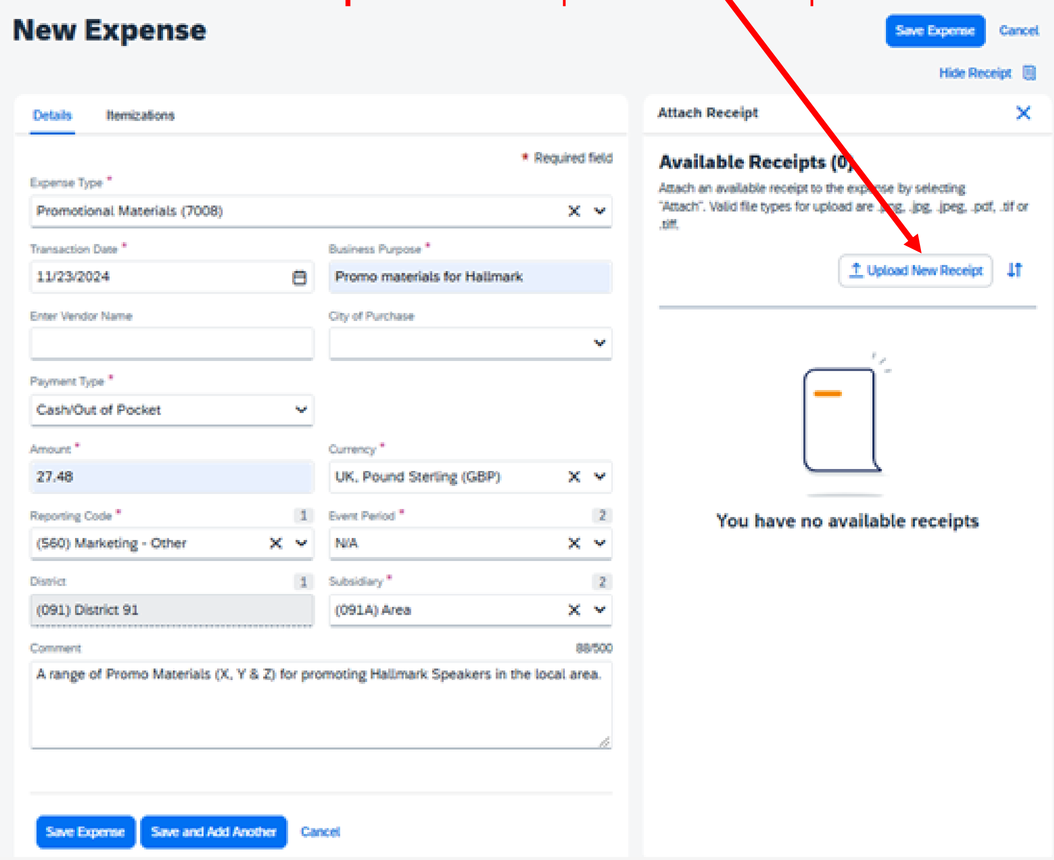
Note: this is NOT an exhaustive list of all of the available 'Expense Types' or 'Reporting Codes', so please check the full list (available in the drop-down menus of the relevant fields) in order to select the appropriate code.

Submitting a Misc. Expense Claim: Step 6

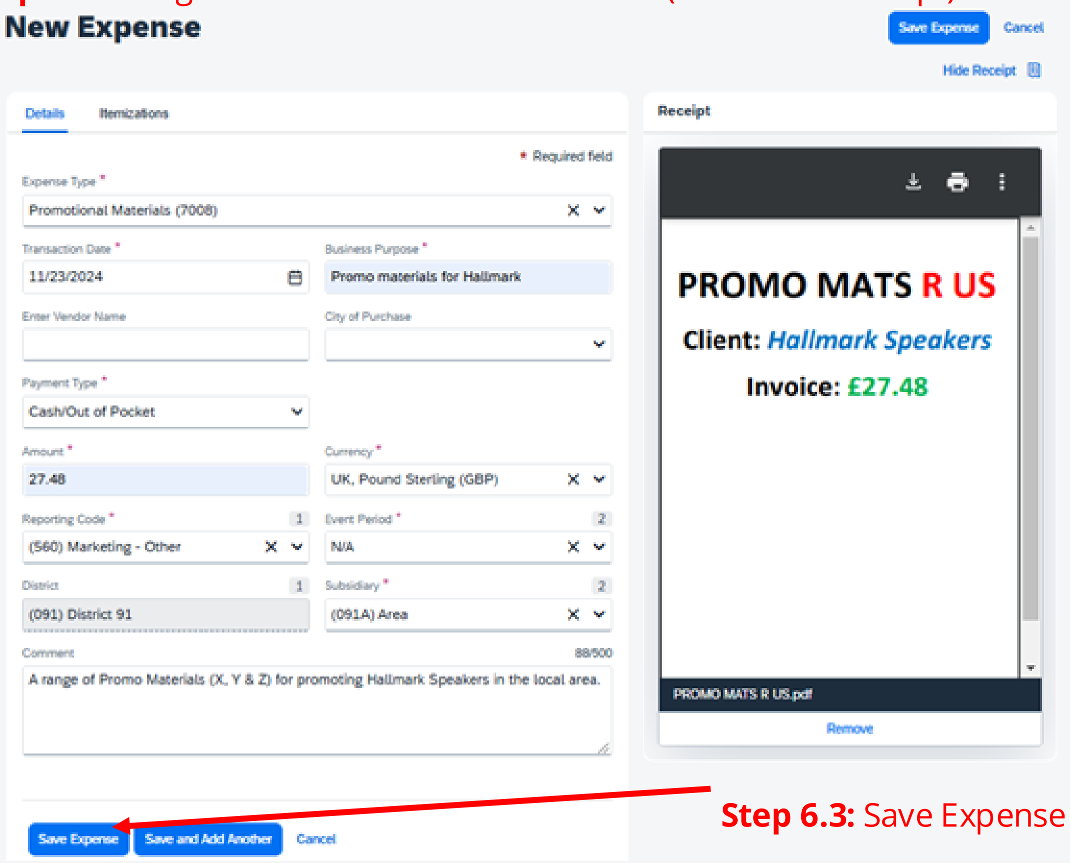
Attach Receipt

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.



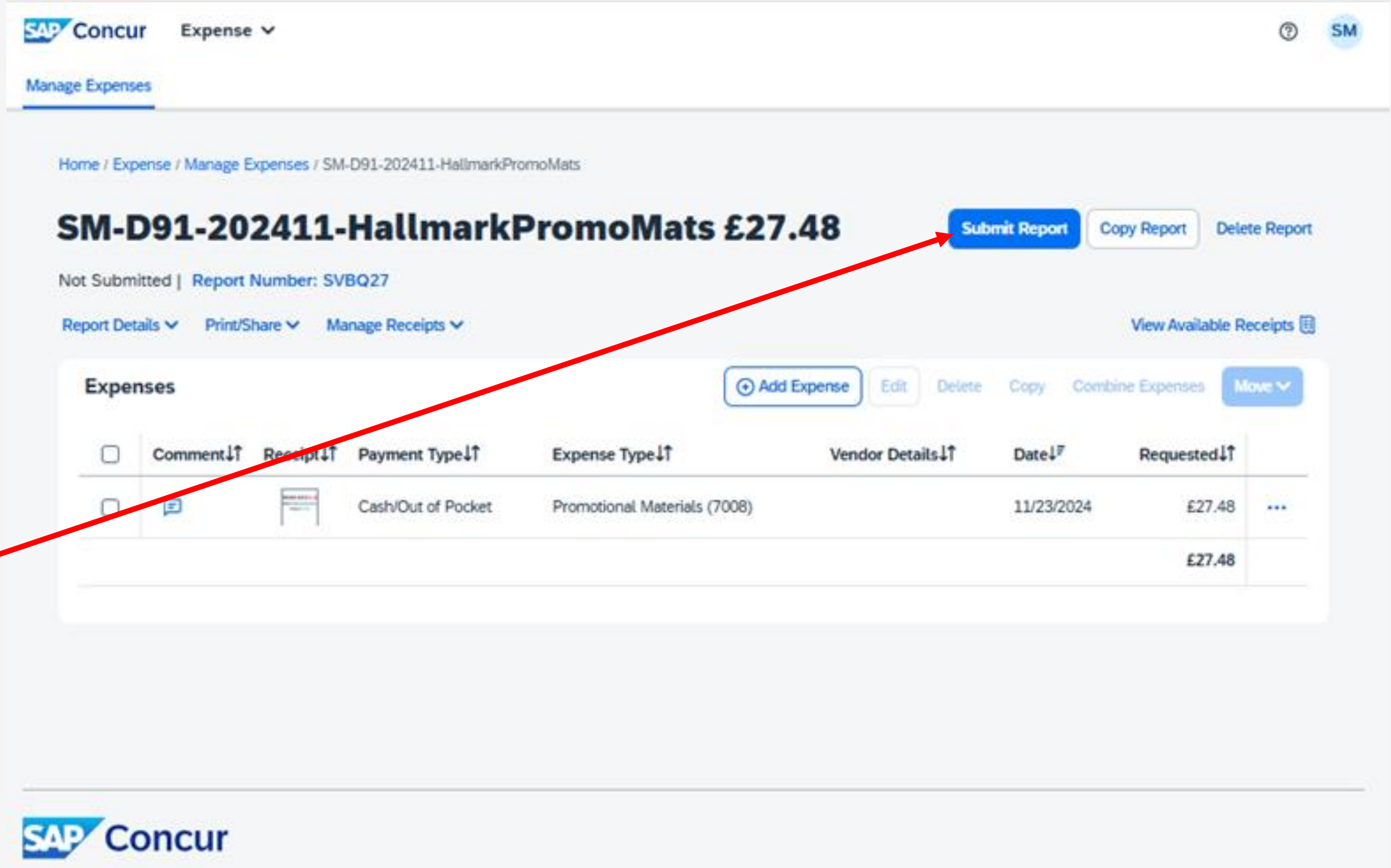
Step 6.3: Save Expense

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)*.

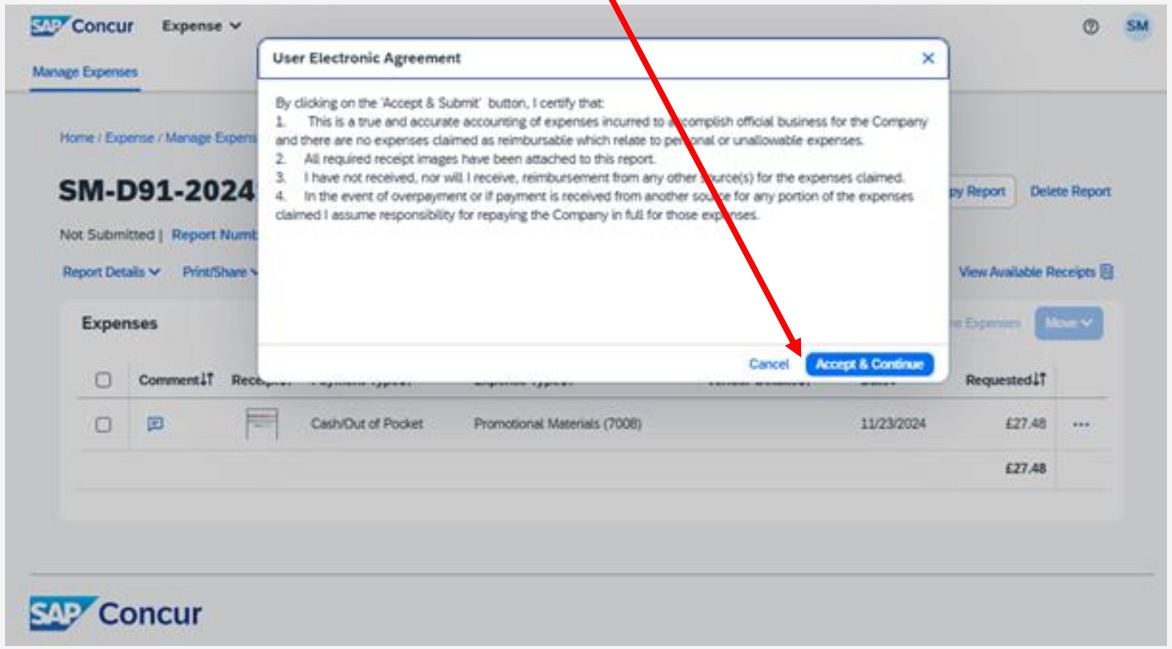


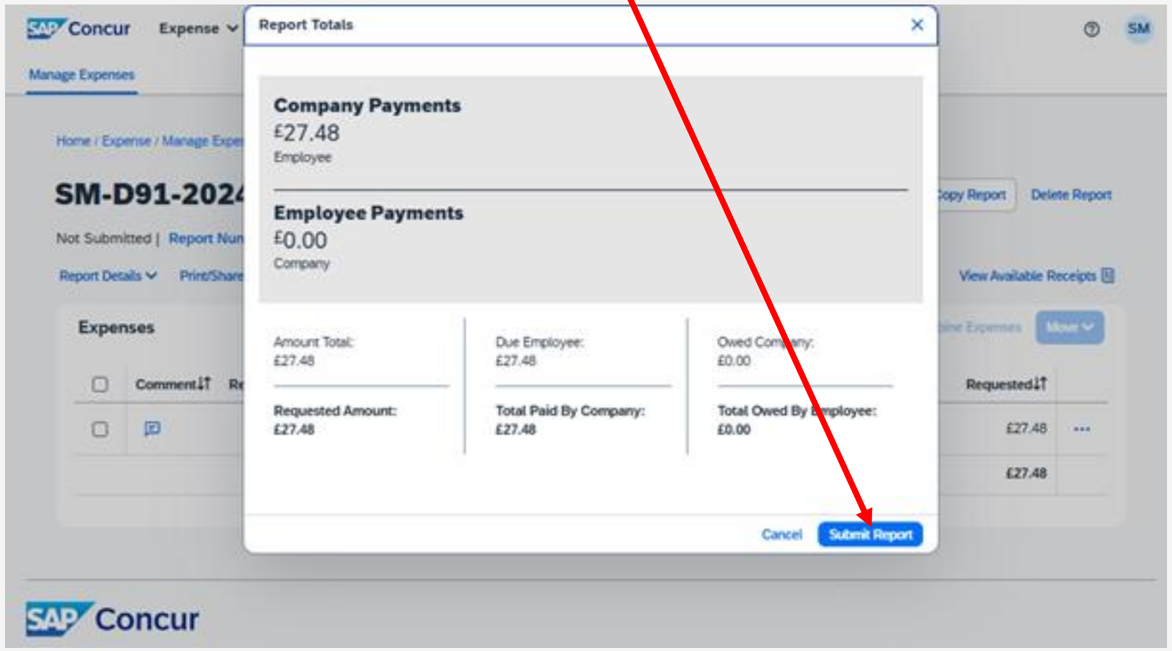
Submitting a Misc. Expense Claim: Step 8

User Agreement Acceptance & Final Submission

Step 8.1: Select ‘Accept & Continue’

Step 8.2: Select ‘Submit Report’

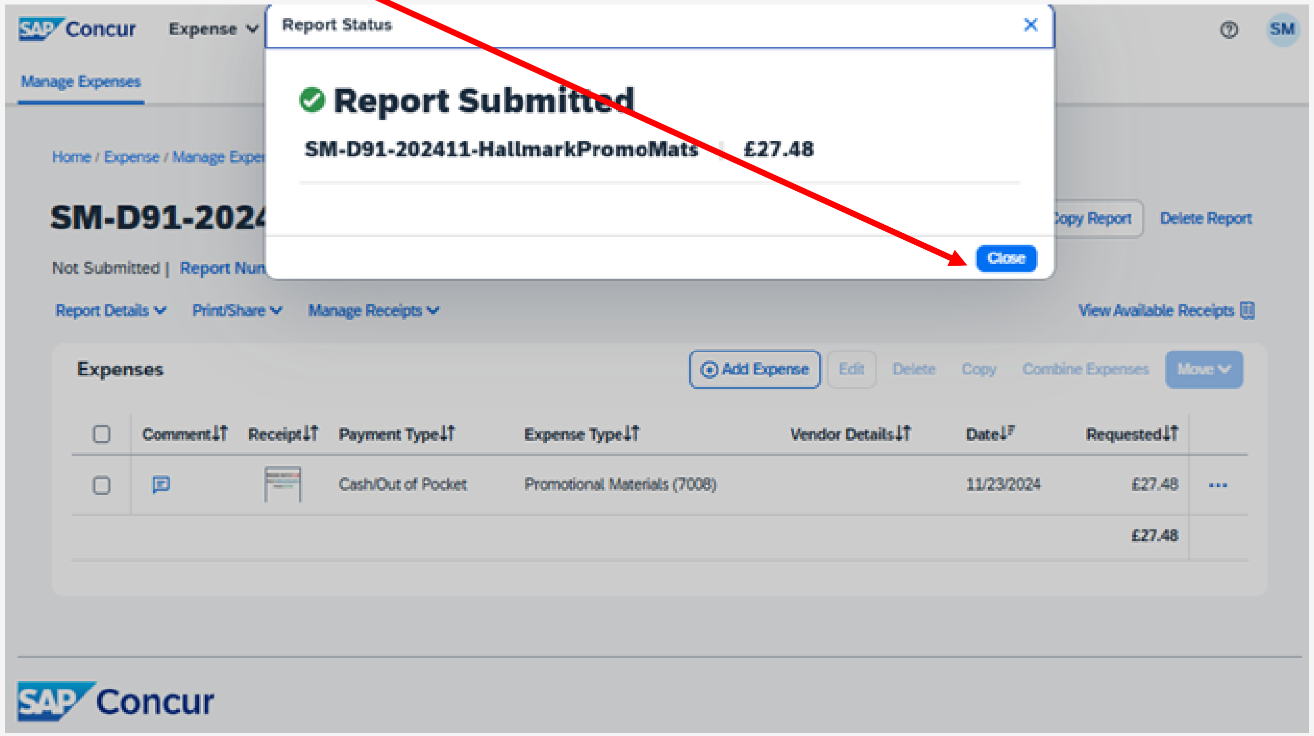




Submitting a Misc. Expense Claim: **Step 9**

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.*