



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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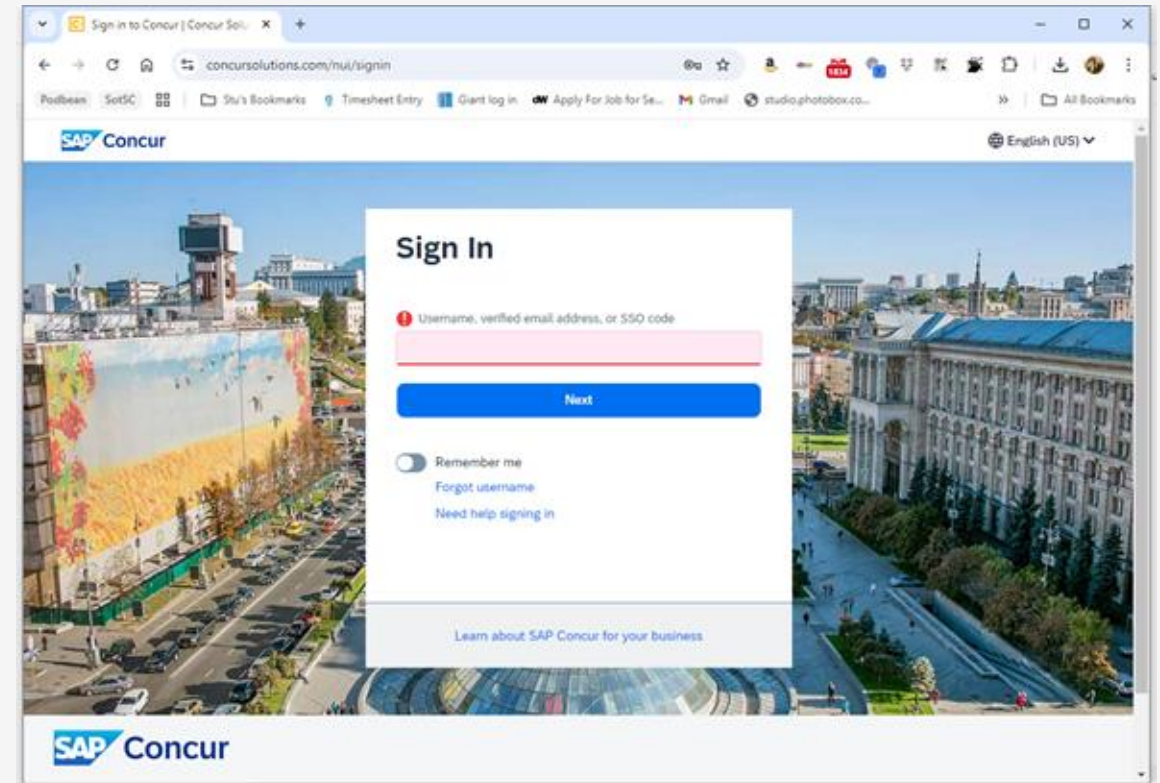
What is Concur?

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

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:

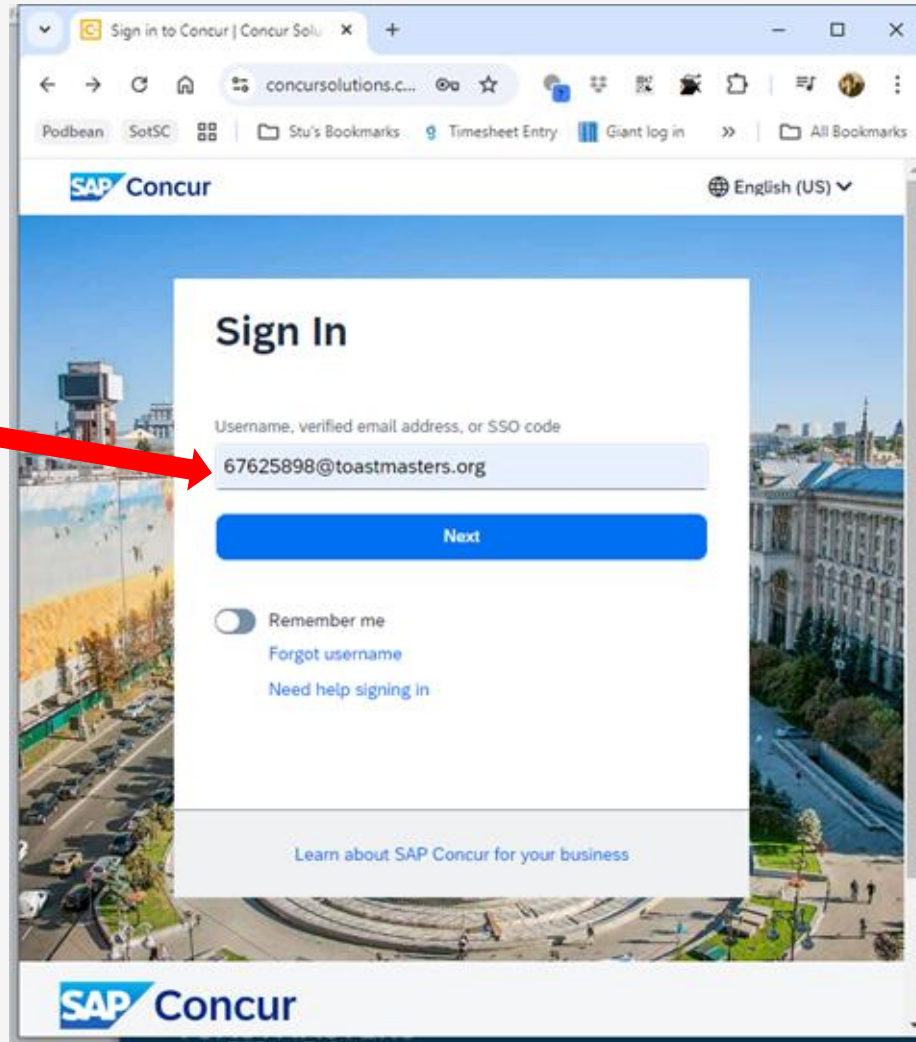
12345678@toastmasters.org

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

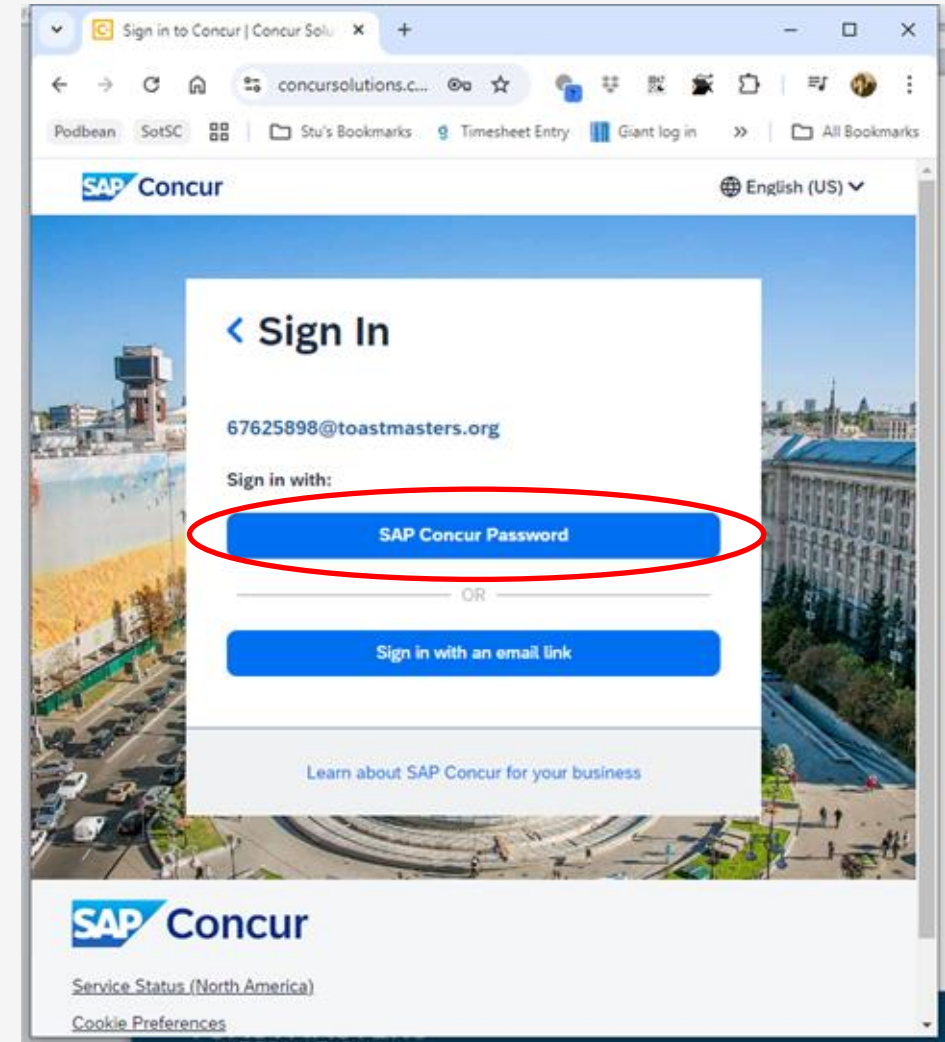
For example:

01234567@toastmasters.org

Go to www.concursolutions.com

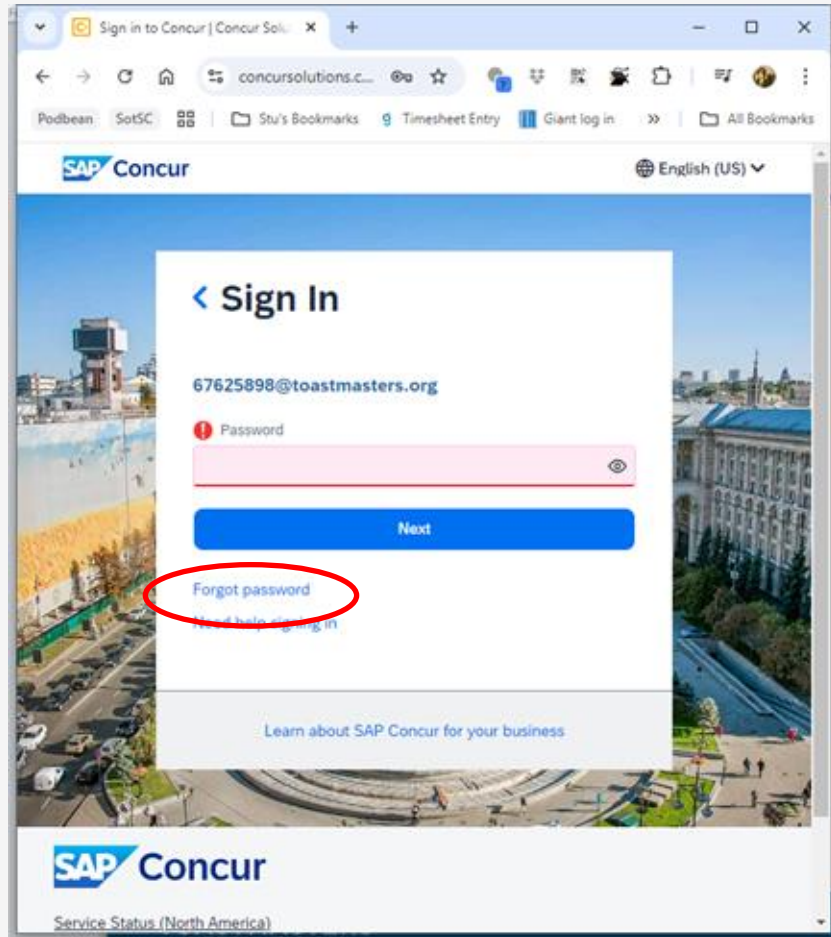


Select 'SAP Concur Password'



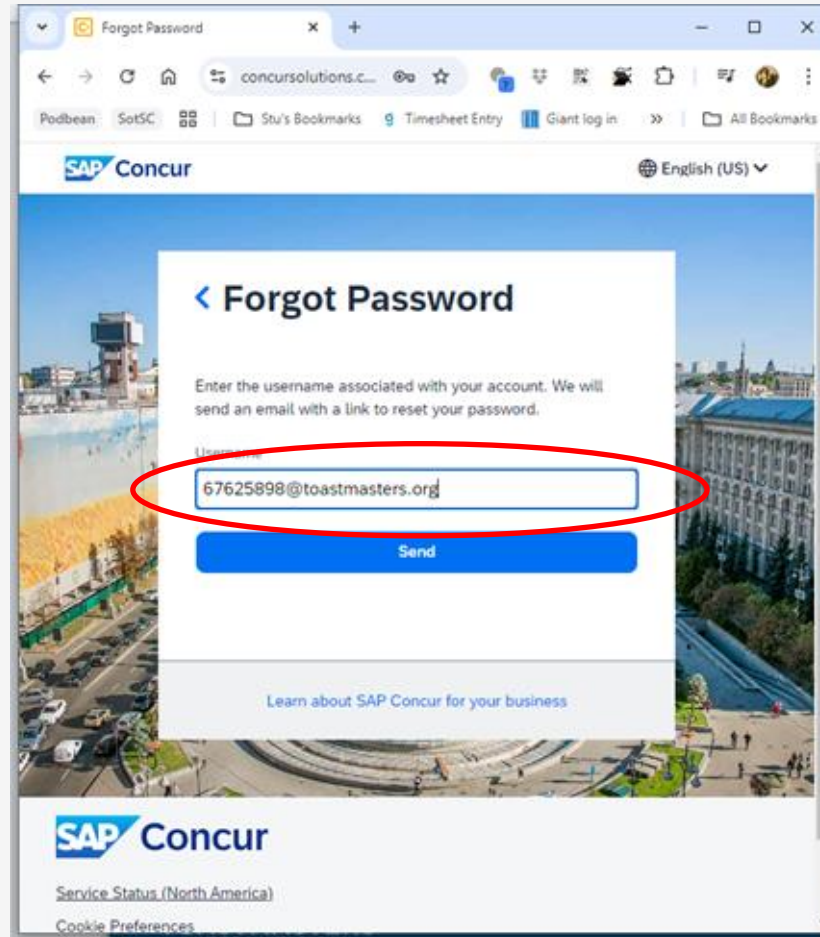
Registration

Select 'Forgot Password'



The screenshot shows the SAP Concur Sign In page. The username field is filled with '67625898@toastmasters.org'. Below the password field, the 'Forgot password' link is circled in red. The 'Next' button is also visible.

Hit 'Send'



The screenshot shows the SAP Concur Forgot Password page. The username field is circled in red and contains the text '67625898@toastmasters.org'. The 'Send' button is visible below the field.

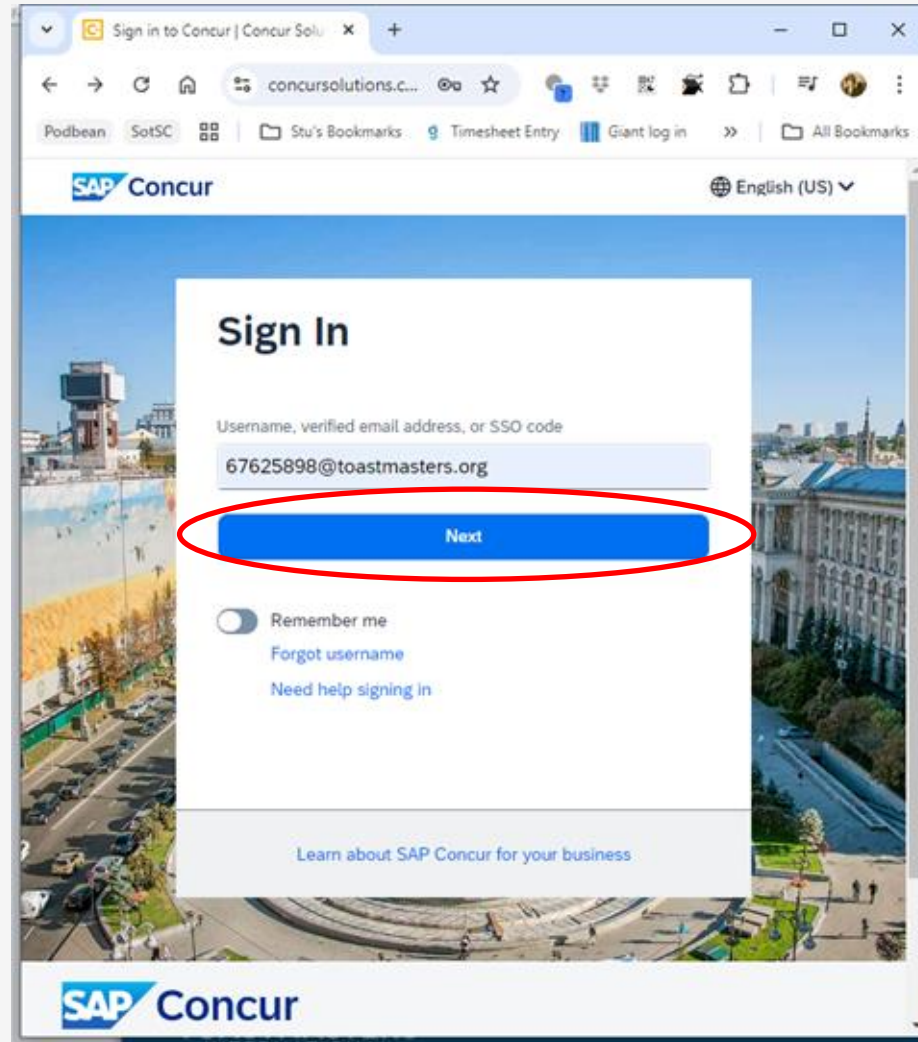
Hitting 'Send' will send an email (to the email address that you used to register with Toastmasters) with instructions on how to reset password.

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

Registration

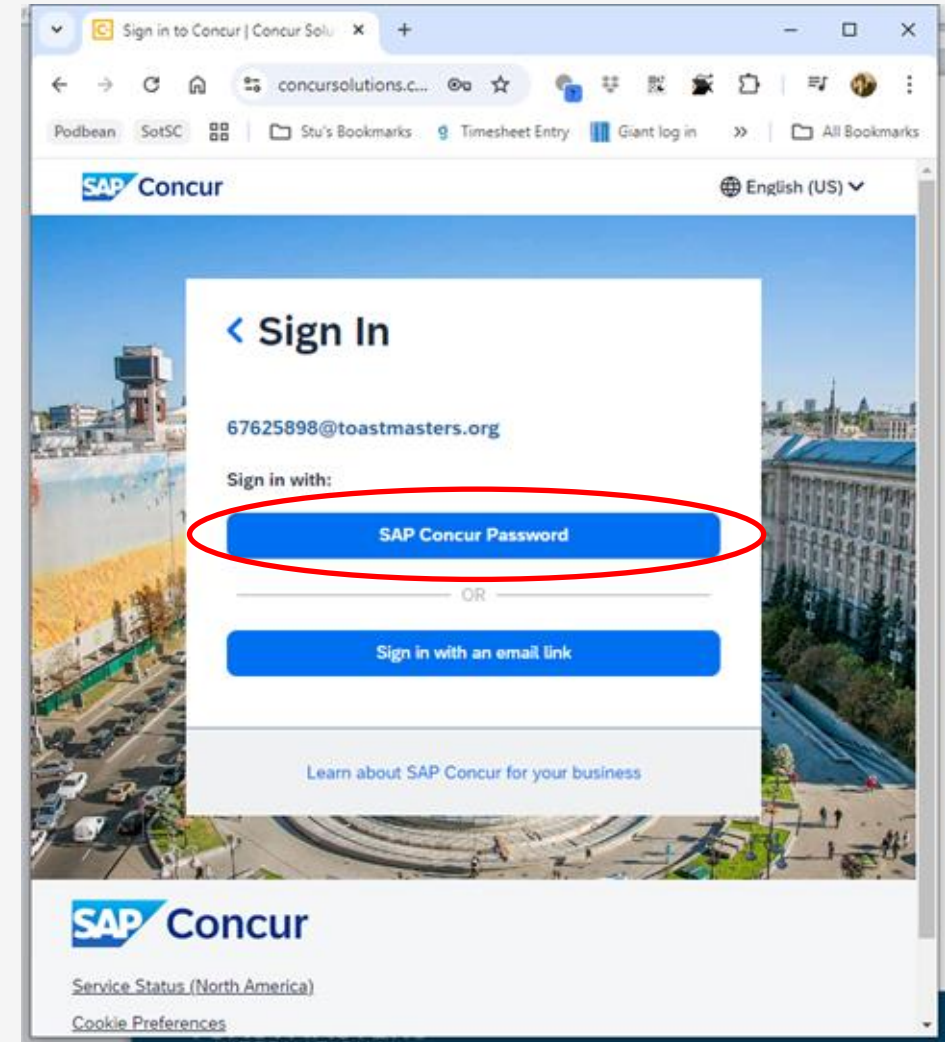
Once you have reset your password, restart the sign-in process.

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



The screenshot shows the SAP Concur Sign In page. The username field contains '67625898@toastmasters.org'. The 'Next' button is circled in red. Below the button are links for 'Remember me', 'Forgot username', and 'Need help signing in'. The background features a cityscape image.

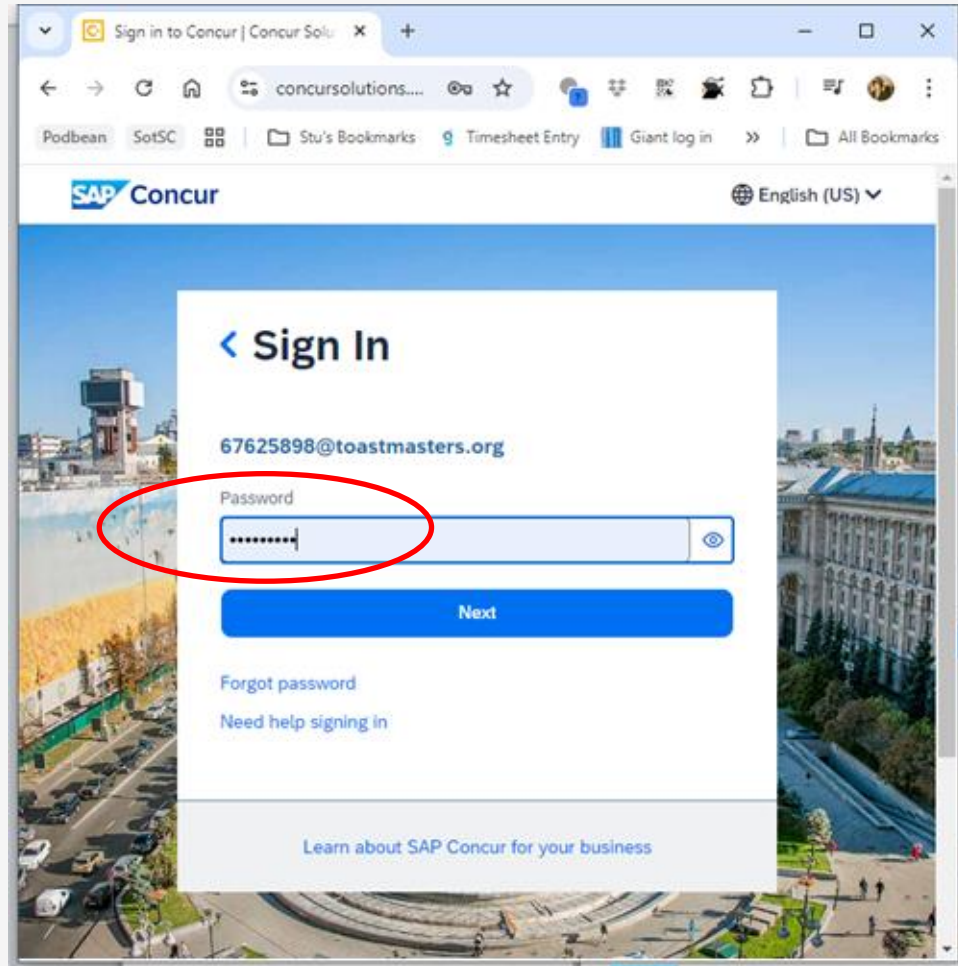
Select 'SAP Concur Password'



The screenshot shows the SAP Concur Sign In page after selecting the password option. The email field contains '67625898@toastmasters.org'. The 'SAP Concur Password' button is circled in red. Below it is a 'Sign in with an email link' button. The background features a cityscape image.

Registration > Two-Factor Authentication

Enter Your Password



Sign in to Concur | Concur Solu

concur solutions....

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

SAP Concur English (US)

< Sign In

67625898@toastmasters.org

Password

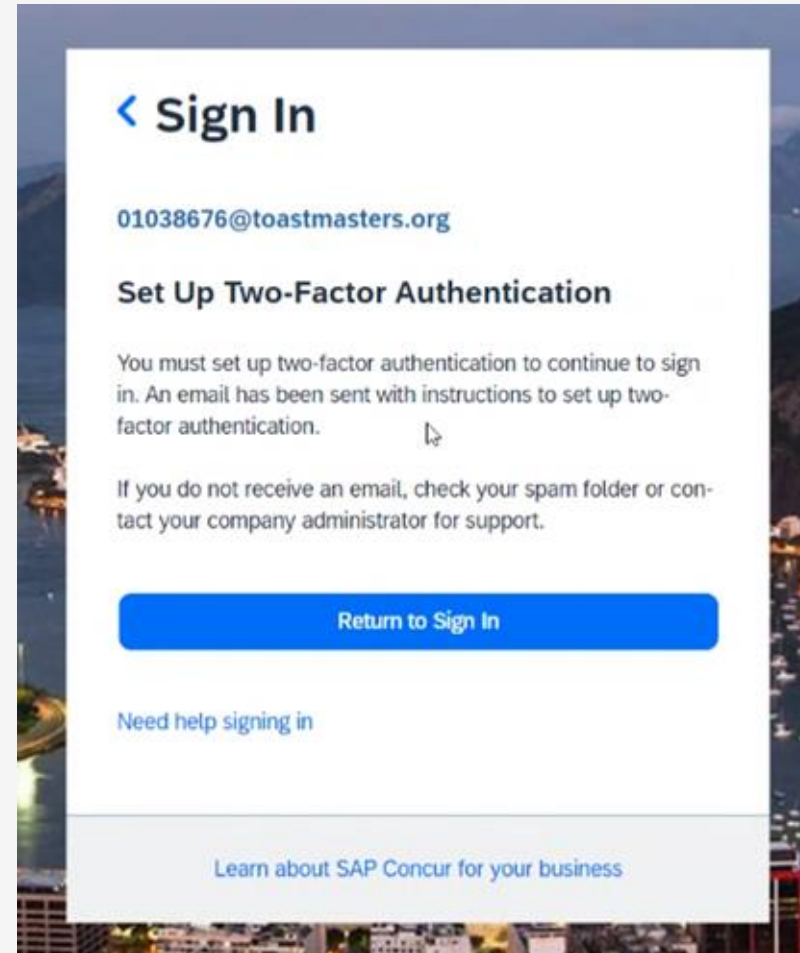
Next

[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](#)

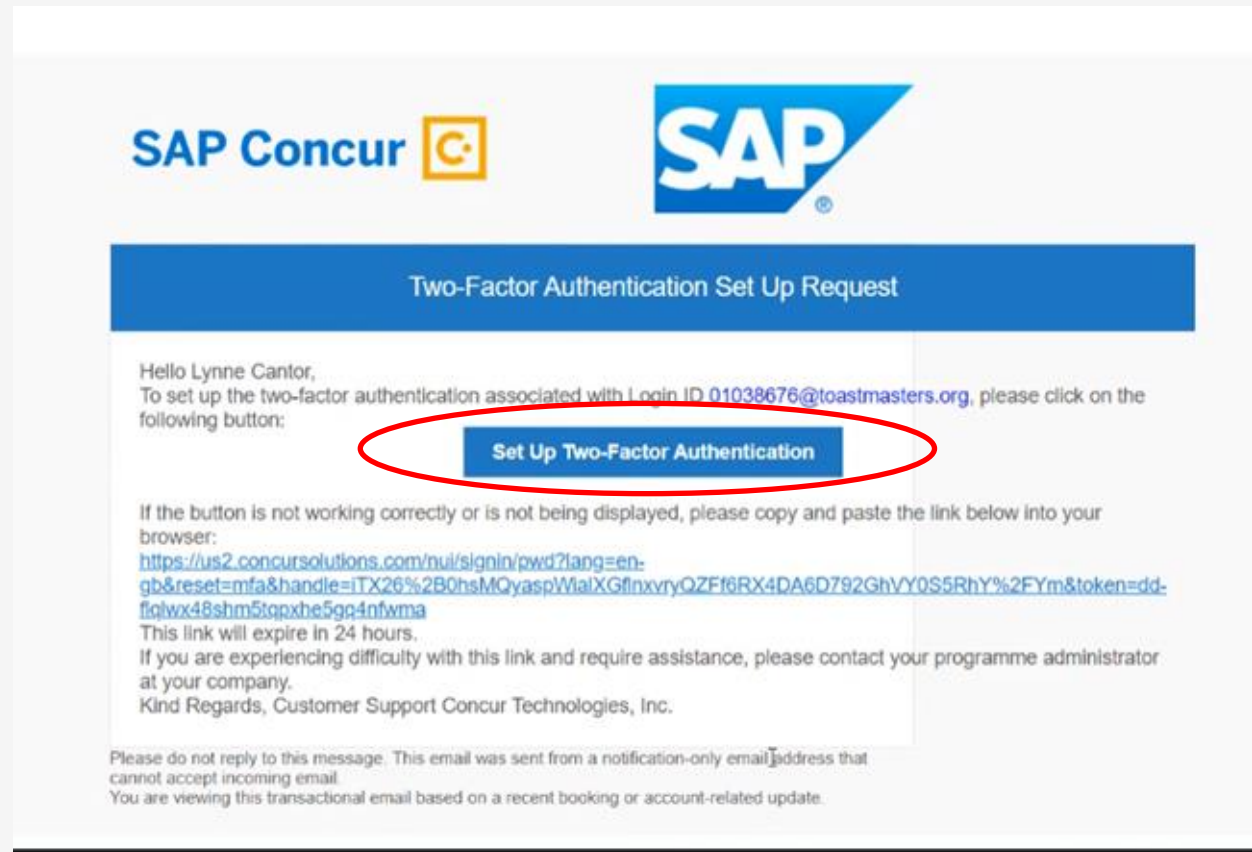
[Learn about SAP Concur for your business](#)

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

concur solutions.com

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

concur solutions.com

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](#)

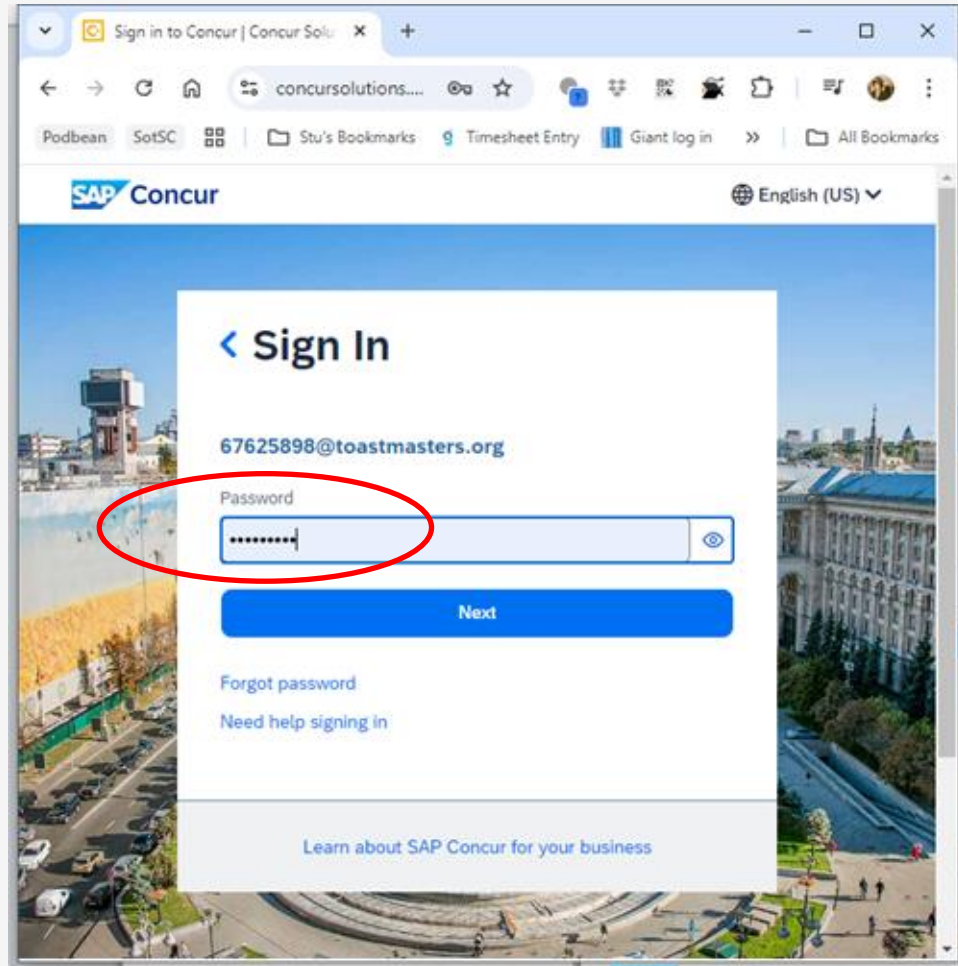
SAP Concur

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

[Cookie Preferences](#)

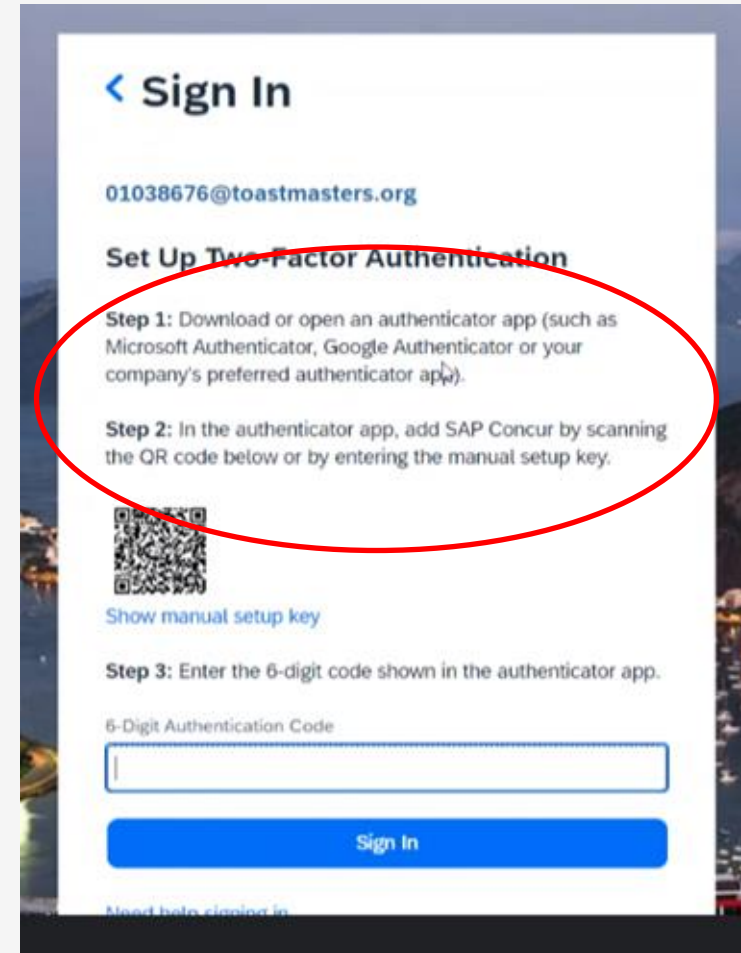
Registration > Two-Factor Authentication

Enter Your Password



The screenshot shows a web browser window with the SAP Concur login page. The email address '67625898@toastmasters.org' is entered. The password field, which contains masked characters, is circled in red. Below the password field is a blue 'Next' button. Links for 'Forgot password' and 'Need help signing in' are visible. The background of the login card features an aerial view of a city square.

Set Up Two-Factor Authentication...



The screenshot shows the 'Set Up Two-Factor Authentication' section of the SAP Concur login page. The email address '01038676@toastmasters.org' is displayed. The section is titled 'Set Up Two-Factor Authentication'. Below the title, two steps are listed: 'Step 1: Download or open an authenticator app (such as Microsoft Authenticator, Google Authenticator or your company's preferred authenticator app)' and 'Step 2: In the authenticator app, add SAP Concur by scanning the QR code below or by entering the manual setup key.' These two steps are circled in red. A QR code is shown below the steps. Below the QR code is a link 'Show manual setup key'. 'Step 3: Enter the 6-digit code shown in the authenticator app.' is listed below. A '6-Digit Authentication Code' input field is provided. A blue 'Sign In' button is at the bottom. A link 'Need help signing in' is at the very bottom.

Complete Steps 1 & 2

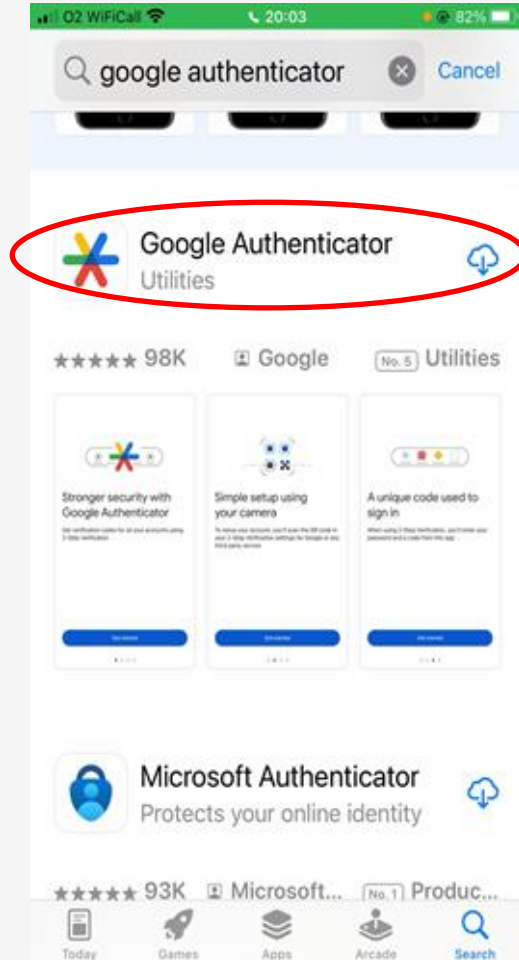
Registration > Two-Factor Authentication

STEP 1:

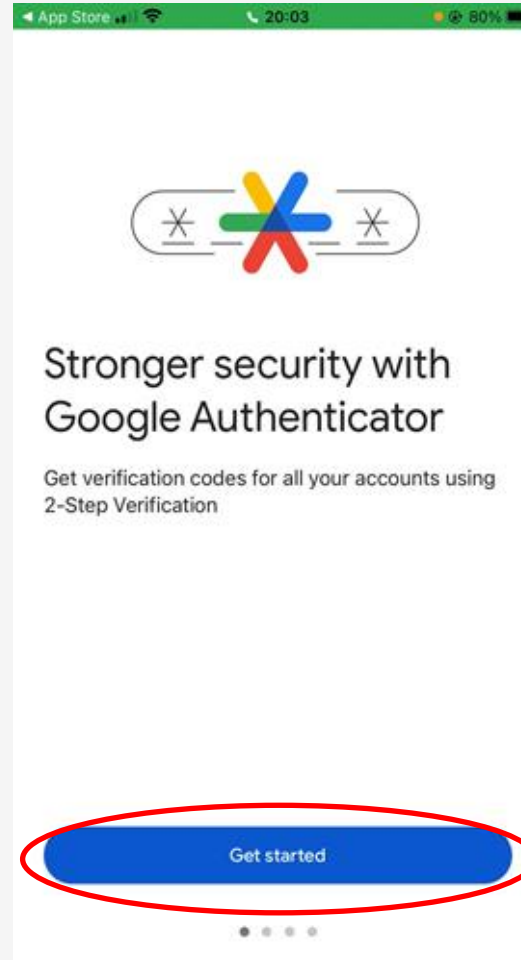
Download an Authenticator App.

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

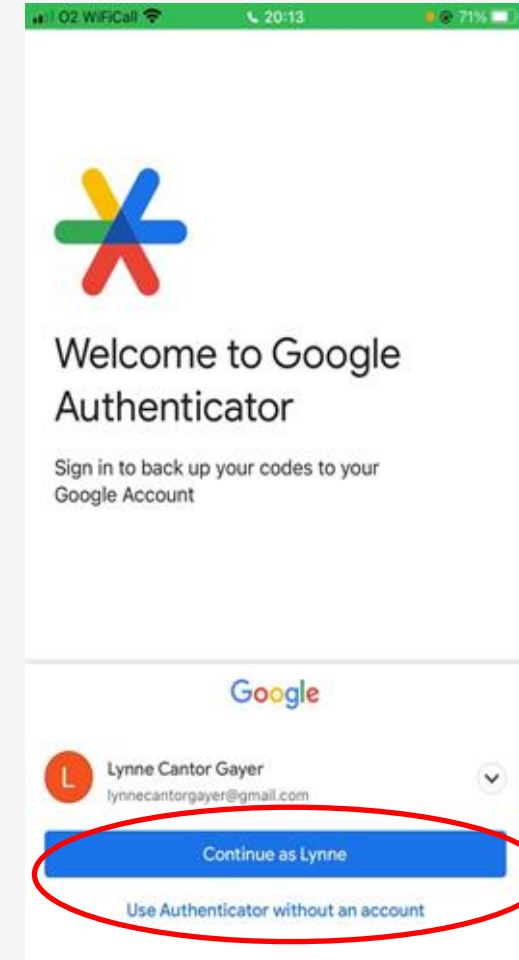
Download an Authenticator App



Set Up Authenticator App



Login with Google Account OR Use without an account

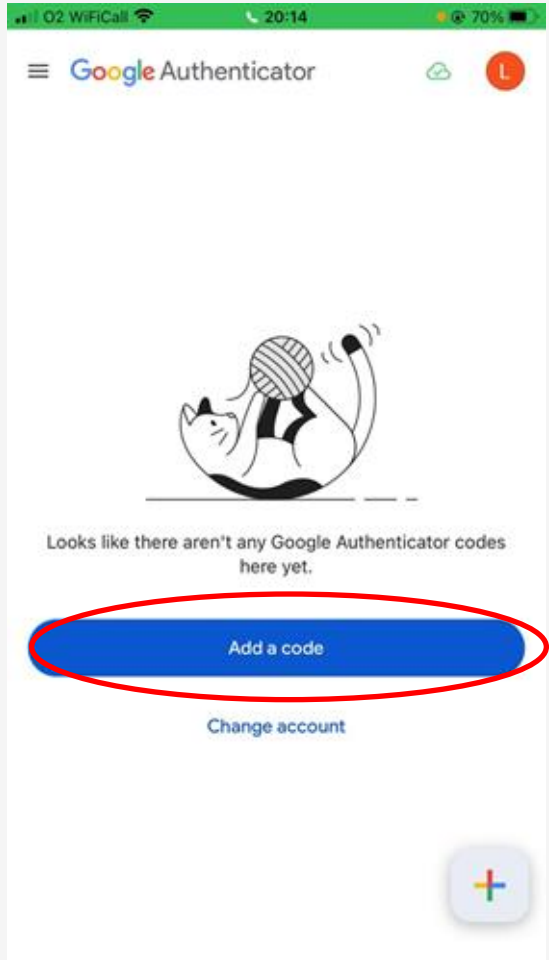


Registration > Two-Factor Authentication

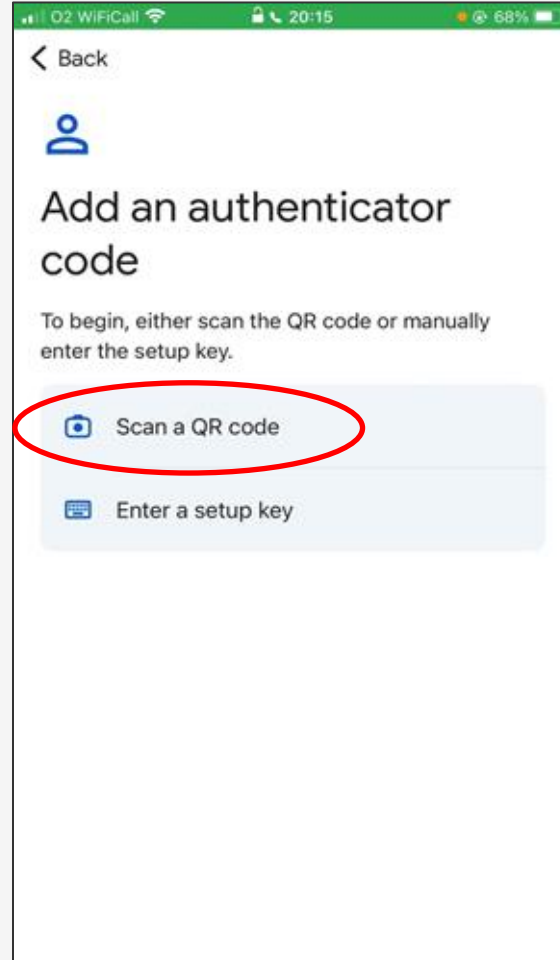
STEP 2:

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

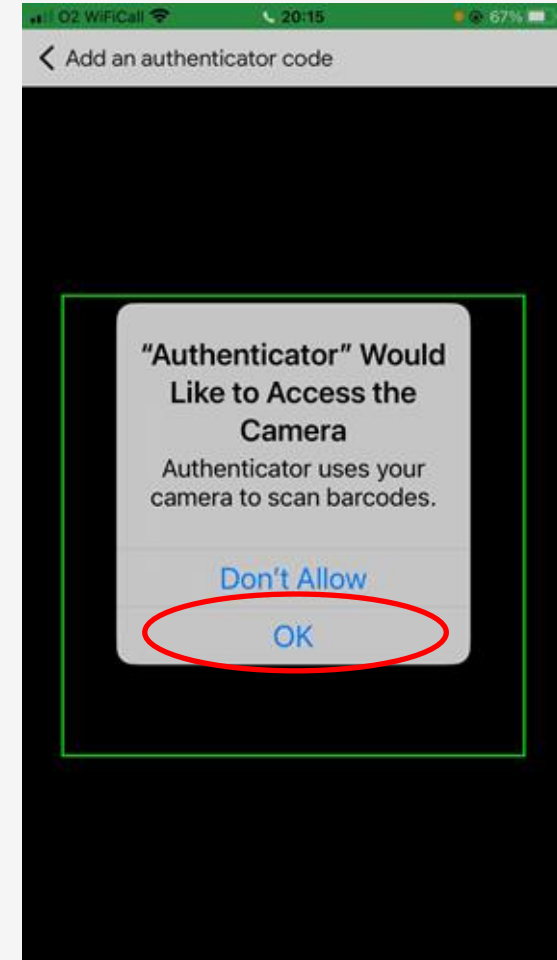
Select 'Add a Code'



Add an Authenticator Code

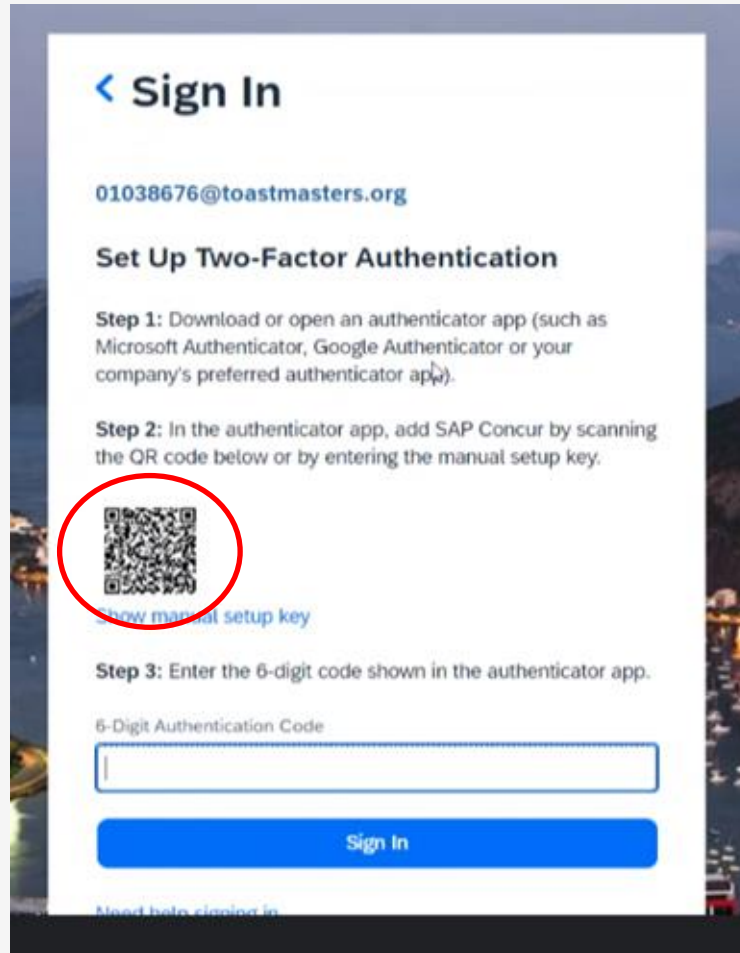


Allow Authenticator App access to the Camera



Registration > Two-Factor Authentication

Scan the QR Code



[< 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](#)

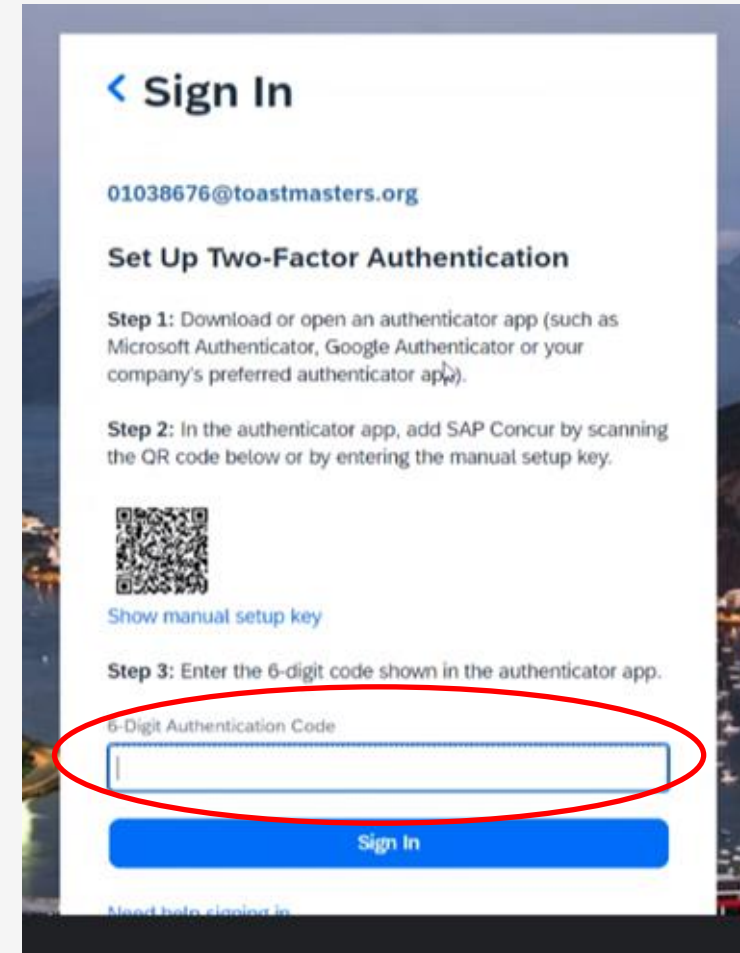
Step 3: Enter the 6-digit code shown in the authenticator app.

6-Digit Authentication Code

[Sign In](#)

[Need help signing in](#)

Enter the 6-Digit Authentication Code



[< 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](#)

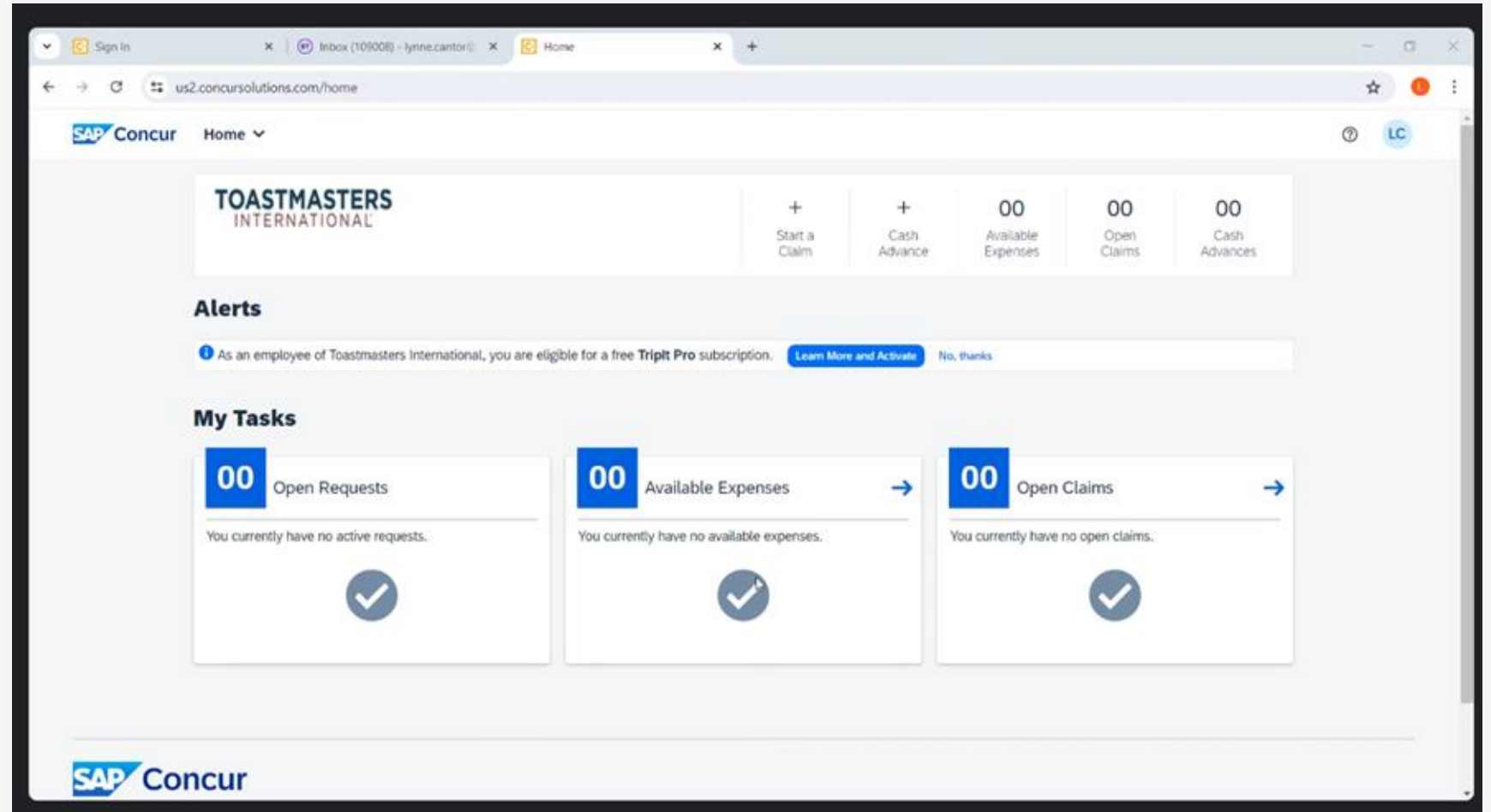
[Need help signing in](#)

Return to the Concur
Login screen and...

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

Registration > 1st Login Success

The following landing page is displayed upon successful 1st Login



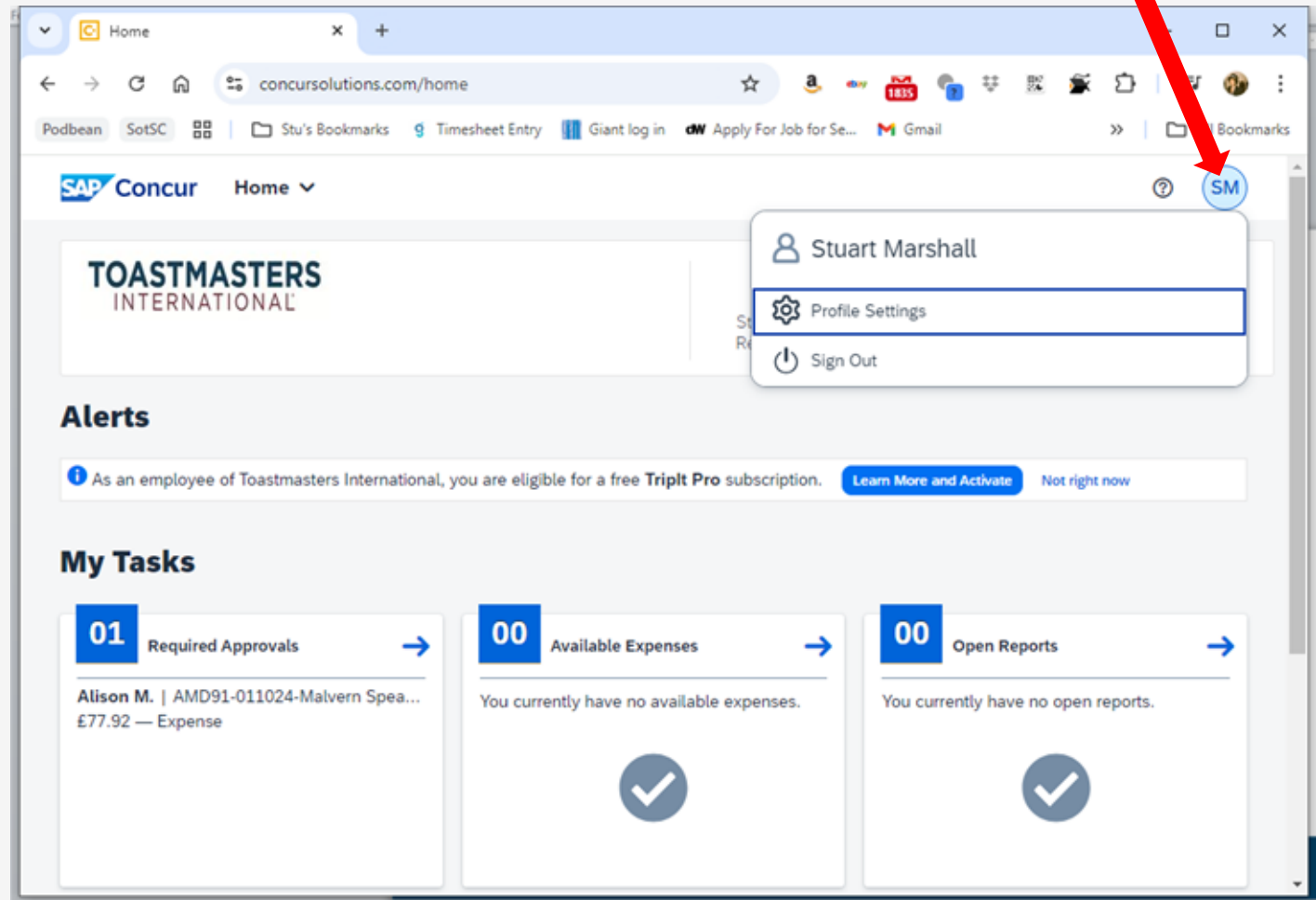
Completing Your User Profile

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.

Profile Options

Select one of the following to customize your profile:

- Personal Information**
- System Settings
- Bank Information
- Expense Preferences
- Personal Car
- Concur Mobile Registration

My Profile - Personal Information

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.

Personal Information

Title: [Required] Mr (dropdown menu) | First Name: Stuart | Middle Name: | Preferred Name: Stuart | Last Name: Marshall | Suffix: (dropdown menu)

Expense Settings

Expense Information | Bank Information | Expense Delegates | Expense Preferences | Expense Approvers | Company Car | Personal Car | Favorite Attendees

Company Information

Employee ID: 67625892

Other Settings

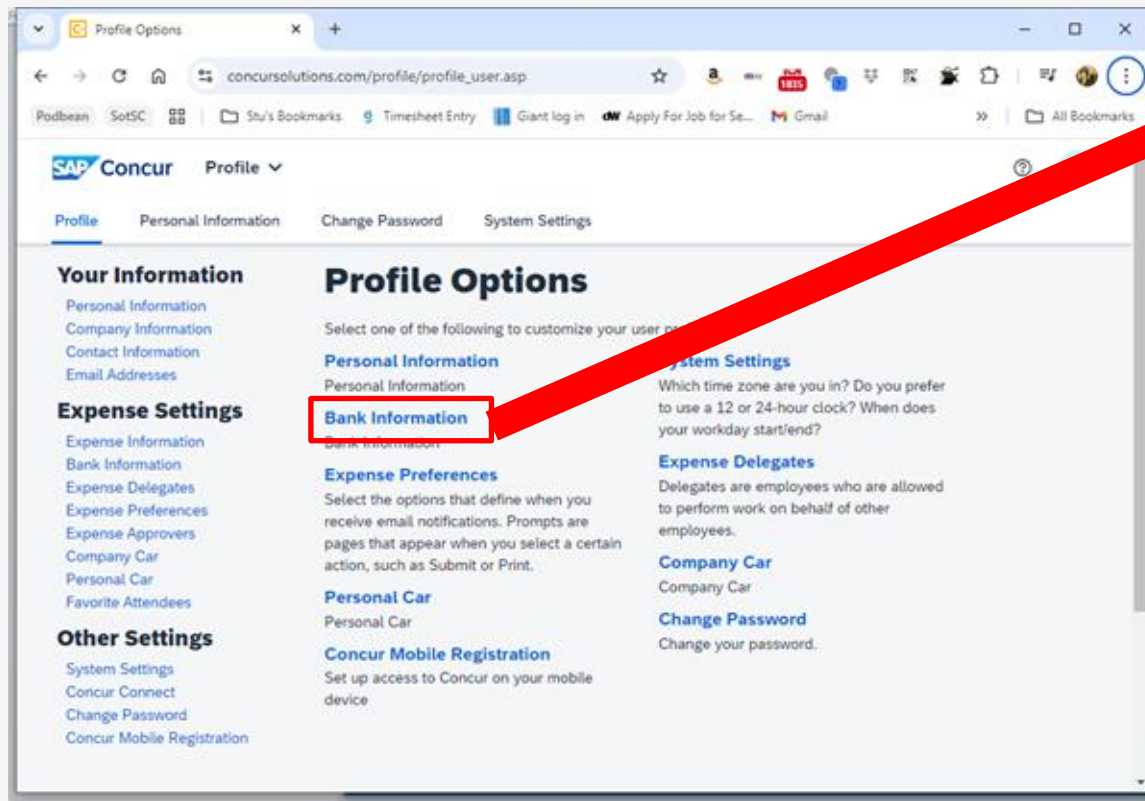
System Settings | Concur Connect | Change Password | Concur Mobile Registration

Contact Information

Mobile Phone Country/Region: (dropdown menu) | Mobile Phone: (text field)

Completing User Profile

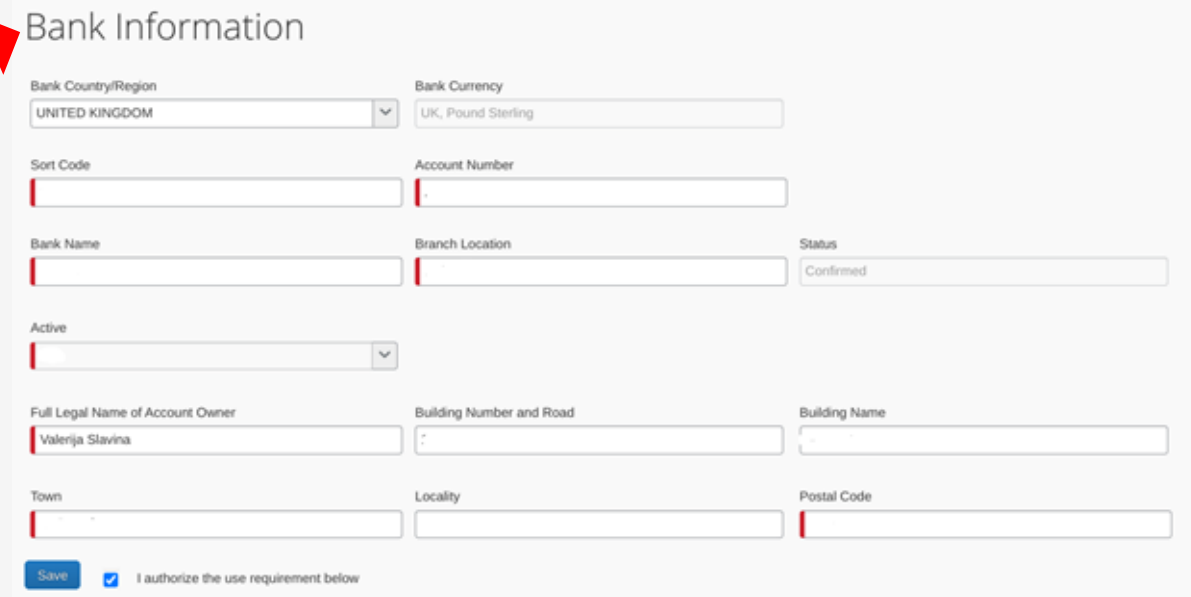
Complete Expense Settings: Bank Information



The screenshot shows the SAP Concur Profile Options page. The left sidebar contains a navigation menu with sections: 'Your Information' (Personal Information, Company Information, Contact Information, Email Addresses), 'Expense Settings' (Expense Information, Bank Information, Expense Delegates, Expense Preferences, Expense Approvals, Company Car, Personal Car, Favorite Attendees), and 'Other Settings' (System Settings, Concur Connect, Change Password, Concur Mobile Registration). The 'Bank Information' link under 'Expense Settings' is highlighted with a red box. A red arrow points from this box to the 'Bank Information' form on the right.

Complete all Bank Details

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



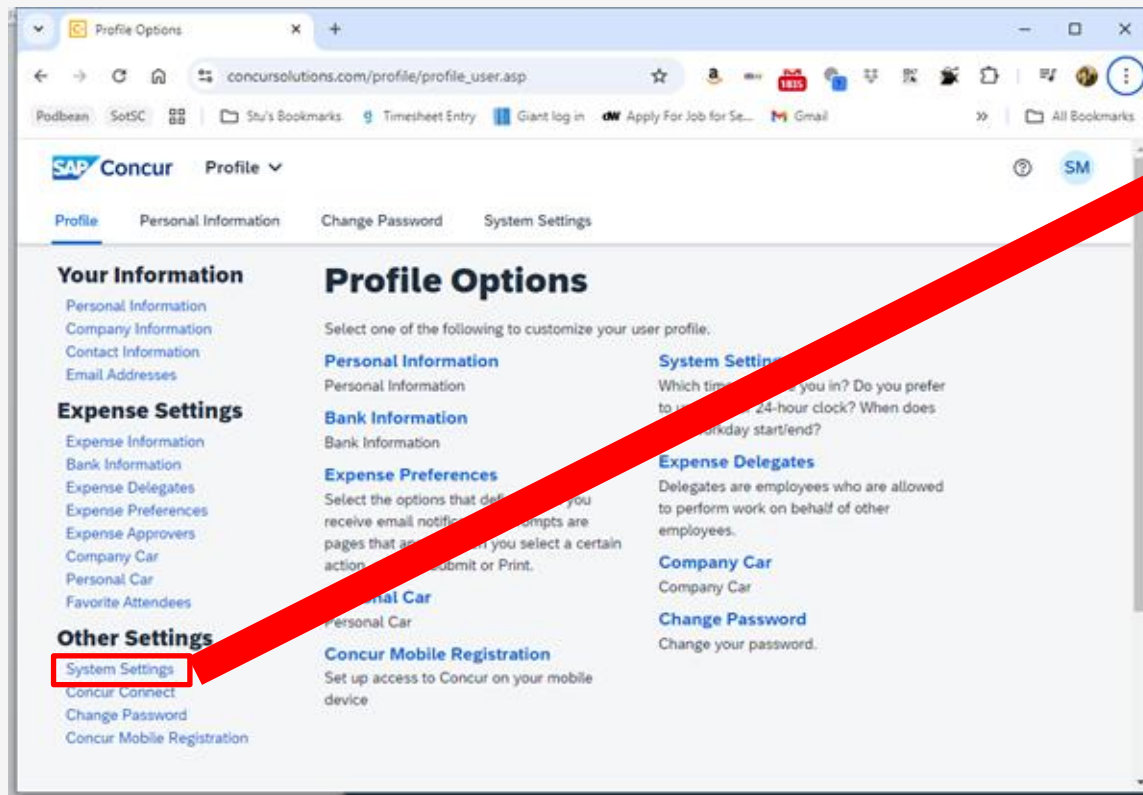
The 'Bank Information' form contains the following fields:

- Bank Country/Region: UNITED KINGDOM (dropdown)
- Bank Currency: UK, Pound Sterling (text)
- Sort Code: (text)
- Account Number: (text)
- Bank Name: (text)
- Branch Location: (text)
- Status: Confirmed (text)
- Active: (dropdown)
- Full Legal Name of Account Owner: Valerija Slavina (text)
- Building Number and Road: (text)
- Building Name: (text)
- Town: (text)
- Locality: (text)
- Postal Code: (text)

At the bottom, there is a 'Save' button and a checkbox labeled 'I authorize the use requirement below' which is checked.

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:

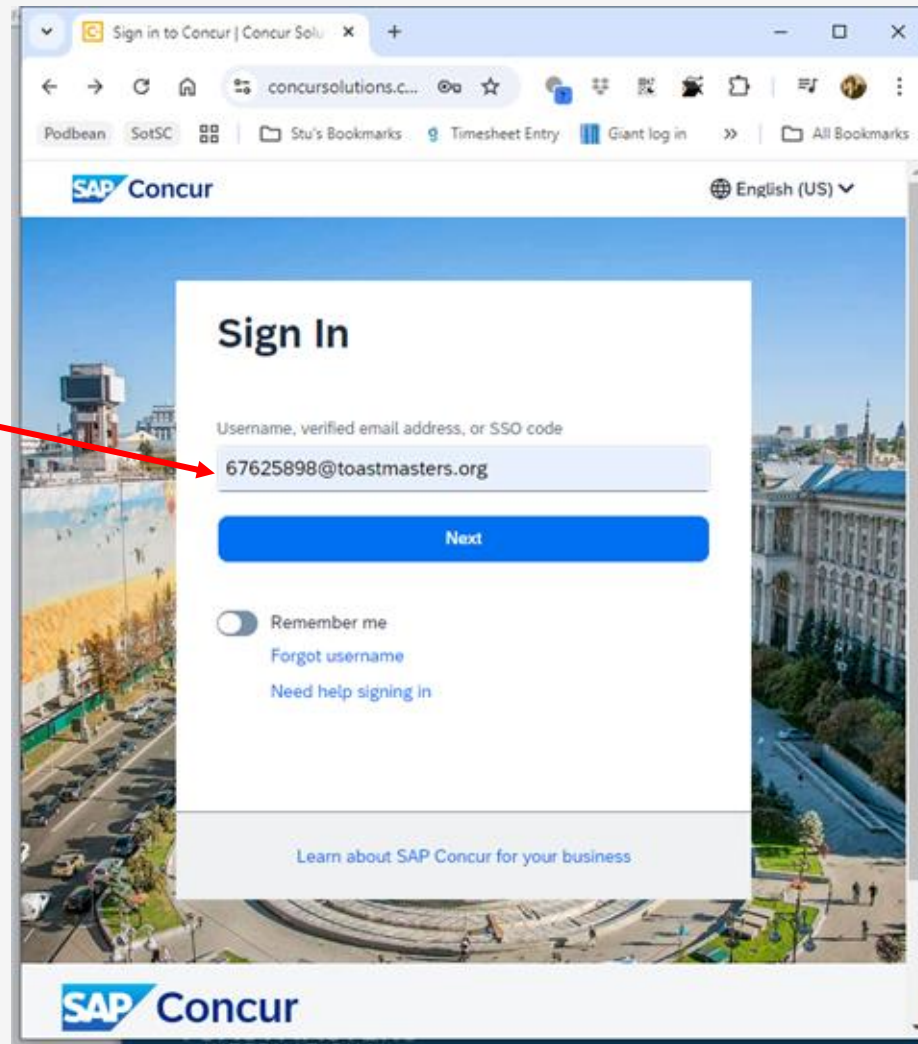
12345678@toastmasters.org

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

For example:

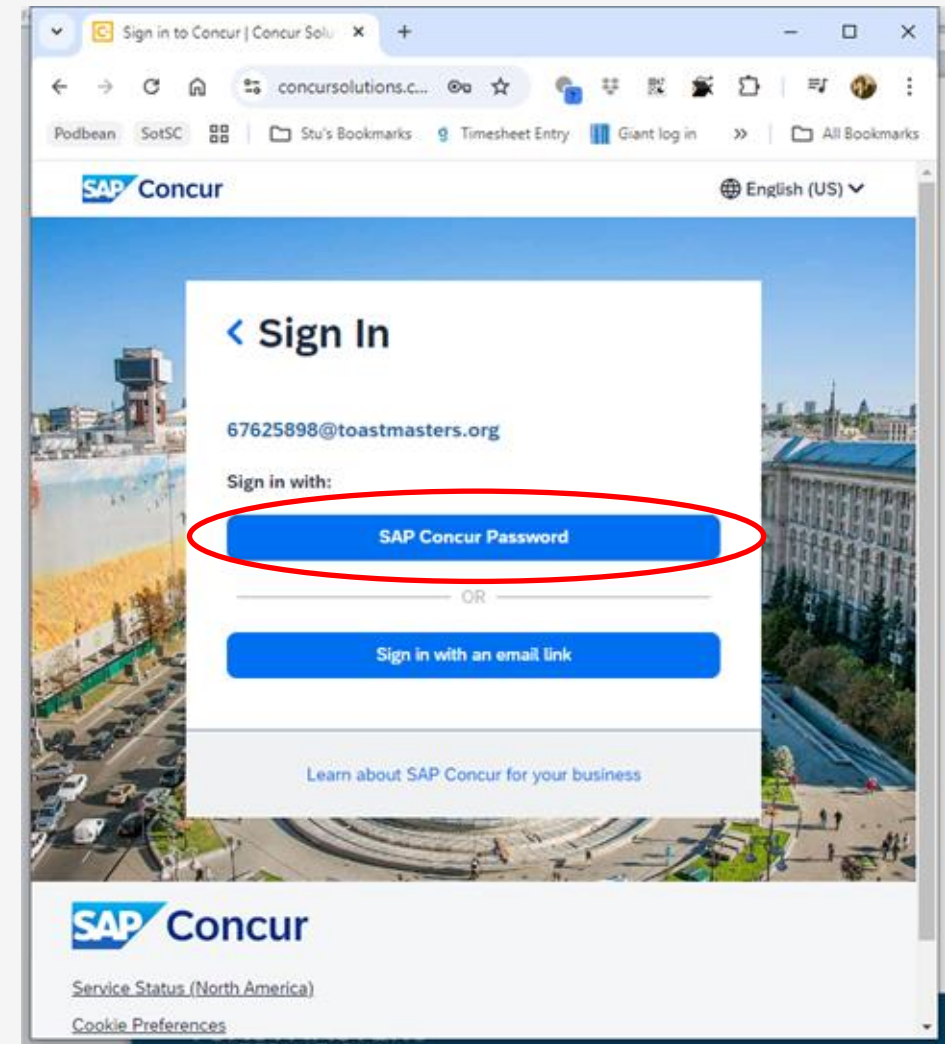
01234567@toastmasters.org

Go to www.concursolutions.com



The screenshot shows the SAP Concur 'Sign In' page. The browser address bar displays 'concursolutions.com'. 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 text input field labeled 'Username, verified email address, or SSO code'. The field contains the email '67625898@toastmasters.org'. A red arrow points from the text 'memberID@toastmasters.org' in the previous block to this input field. Below the input field is a blue 'Next' button. There are also links for 'Remember me', 'Forgot username', and 'Need help signing in'. At the bottom, there is a link to 'Learn about SAP Concur for your business'.

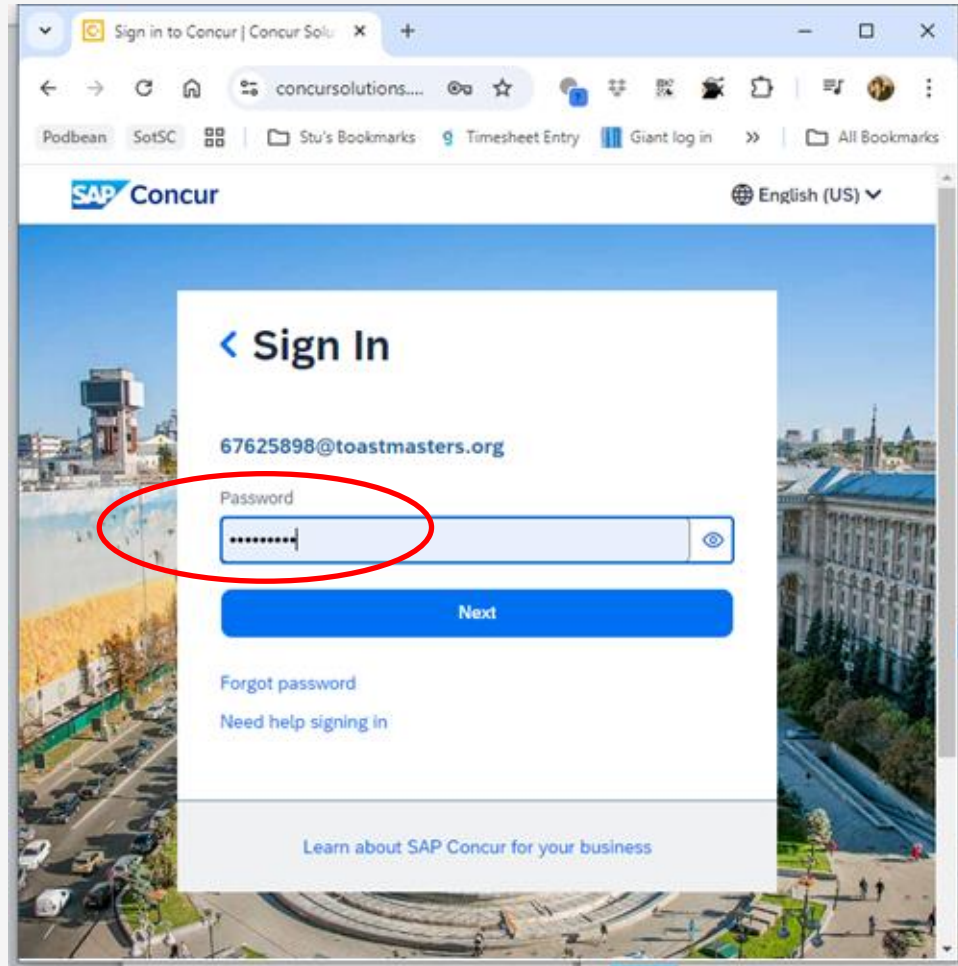
Select 'SAP Concur Password'



The screenshot shows the SAP Concur 'Sign In' page after clicking 'Next'. The browser address bar displays 'concursolutions.com'. 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 shows the email '67625898@toastmasters.org' entered. Below the email, there is a section 'Sign in with:' with two options: 'SAP Concur Password' (highlighted with a red oval) and 'Sign in with an email link'. There is also an 'OR' separator between the two options. At the bottom, there is a link to 'Learn about SAP Concur for your business'.

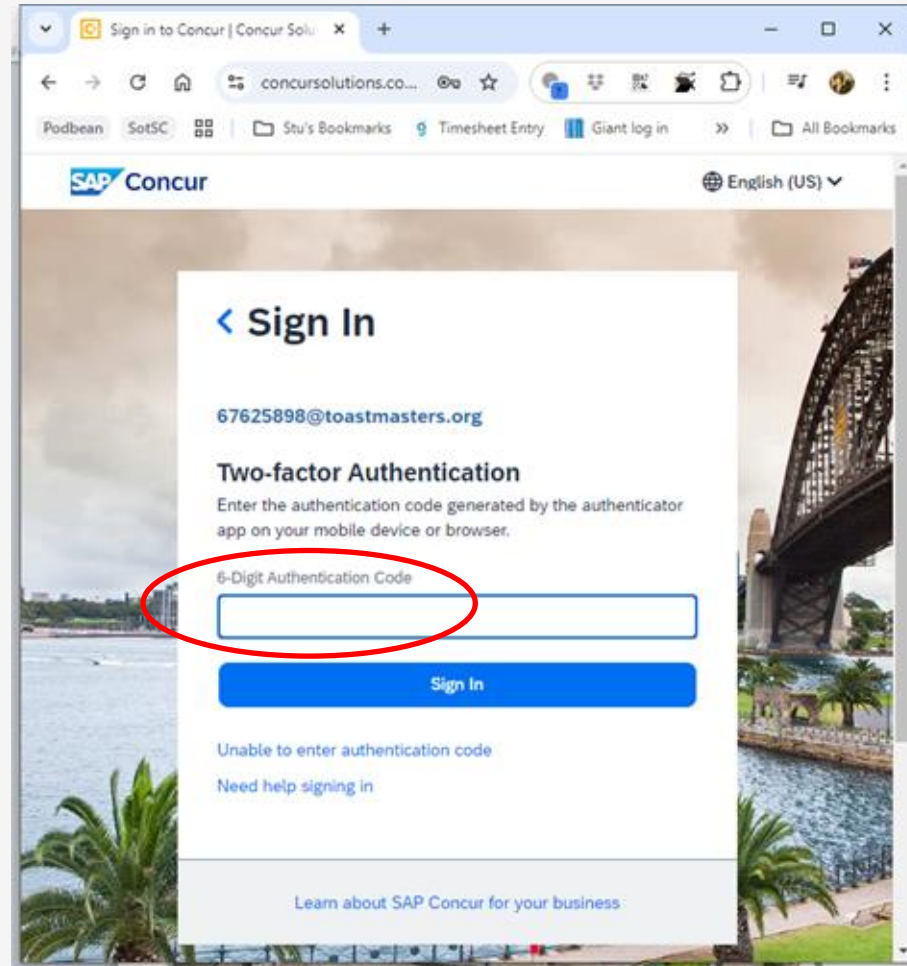
Login

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. Links for 'Forgot password' and 'Need help signing in' are visible. 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' and a blue 'Sign In' button. Links for 'Unable to enter authentication code' and 'Need help signing in' are visible. 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

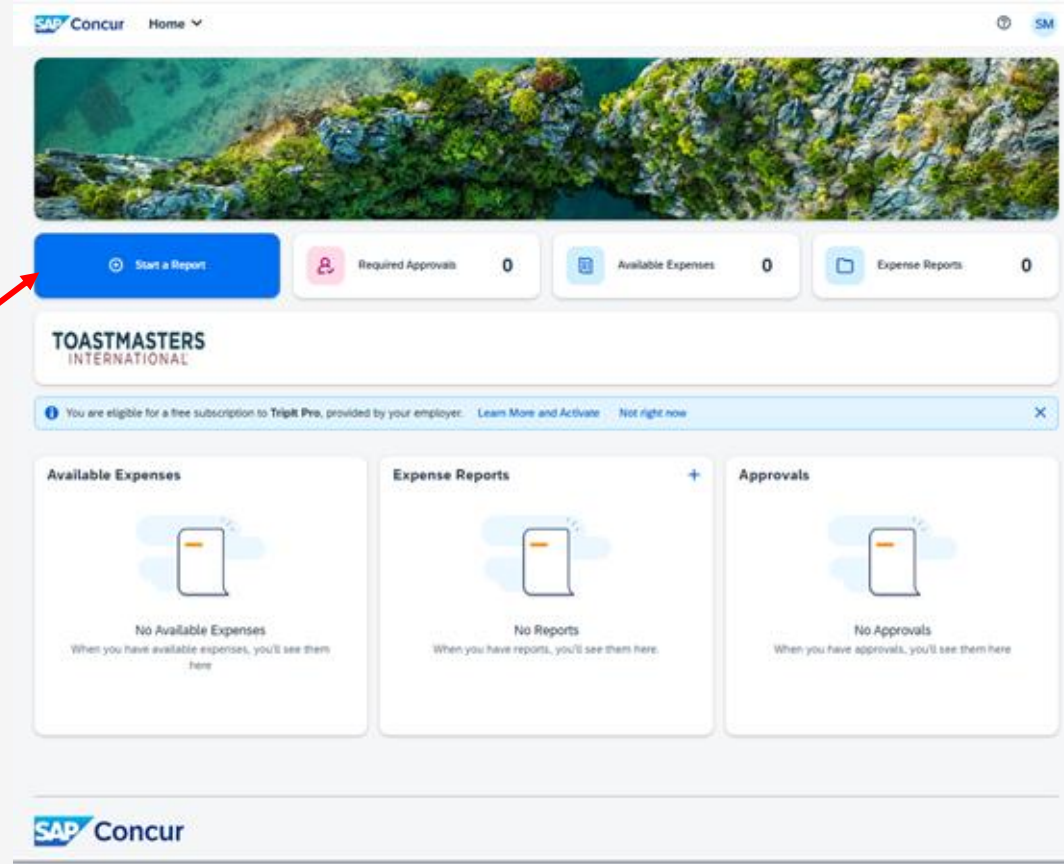
1. Click on **START A REPORT**
2. Next enter a **REPORT NAME** in the following format: **XX-D91-YYYYMM - Description**
Where **XX** = your initials, **YYYY** = Year, **MM** = Month & **Description** = Reason for Expense
*For example: **SM-D91-202407 - Ferndown Club Visit***
3. **ADD EXPENSES** – complete 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 field with the placeholder '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 the placeholder 'Add comments/narrative to provide details/background of the expense. For example: For club visits, add the name of the club visited...'. A character count '135/500' is visible.

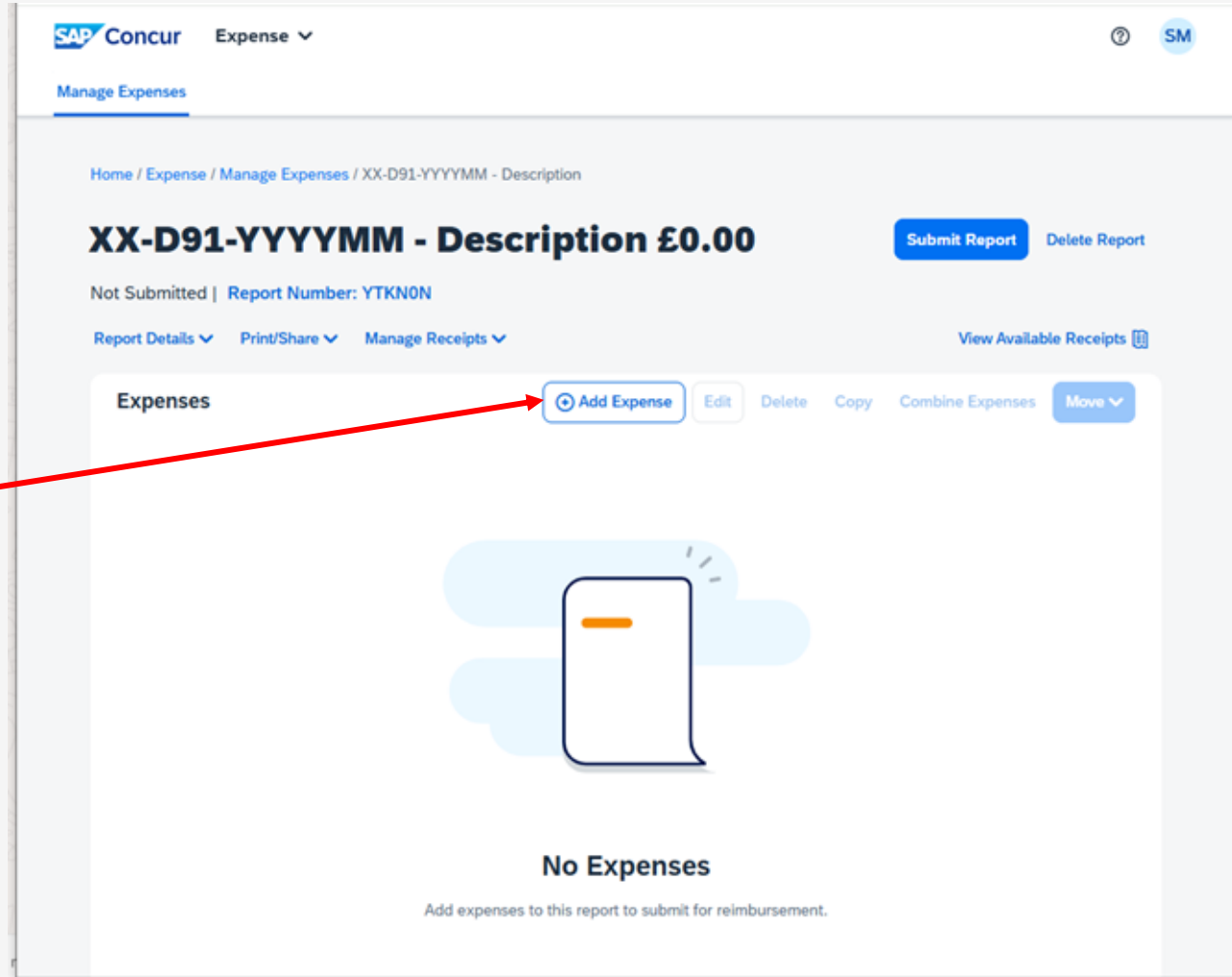
At the bottom right of the form, there are two buttons: 'Cancel' and 'Create Report'. A red arrow points from the 'Create Report' button in the form to the 'Create Report' button in the instructions box below the form.

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 'New Expense' is a button next to it. Below this, there is a search bar with the placeholder text 'Search by expense type, category, description'. The dialog is organized into sections. The first section is '01. Travel', which is expanded. Under this section, there is a list of expense types: 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. Below the '01. Travel' section is the '02. Other' section, which is also expanded and shows 'Advertising (7036)'. At the bottom right of the dialog is a 'Cancel' button. At the very bottom of the dialog, there is a small text line: 'Add expenses to this report to submit for reimbursement.'

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

Expense Type *

Mileage (7062)

Transaction Date *

11/23/2024

Enter Vendor Name

Payment Type *

Cash/Out of Pocket

Amount *

From Location

BH1 3PQ

Number of Miles *

15

Event Period *

N/A

Subsidiary *

District

Fuel Receipt Date

MM/DD/YYYY

Comment

Travel to Ferndown Speakers to deliver an Award.

Business Purpose *

Travel to Ferndown Speakers

City of Purchase *

Bournemouth, Dorset

Currency *

UK, Pound Sterling (GBP)

To Location

Ferndown Village Hall

Reporting Code *

(954) Travel - District - Finance Manager

District

(091) District 91

VAT Number

Fuel Receipt Type

None Selected

Save Expense

Save and Add Another

Cancel

Save Expense Cancel

Hide Receipt

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 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'

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

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

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

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



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 displays the SAP Concur 'Manage Expenses' interface. At the top, the breadcrumb trail reads 'Home / Expense / Manage Expenses / XX-D91-YYYYMM - Description'. The main heading is 'XX-D91-YYYYMM - Description £6.75', with a status of 'Not Submitted' and 'Report Number: YTKN0N'. Action buttons include 'Submit Report', 'Copy Report', and 'Delete Report'. Below this, a table titled 'Expenses' contains one entry: a mileage claim for £6.75 on 11/23/2024. A red arrow points from the 'Submit Report' button to the 'NO!' text block. The footer includes 'SAP Concur' branding, service status, contact support, and a last signed-in timestamp of 11/23/2024 09:14 am.

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

Submitting a Mileage Expense Claim: Step 8

User Agreement Acceptance & Final Submission

Step 8.1: Select 'Accept & Continue'

The screenshot shows the SAP Concur 'Manage Expenses' page. A modal dialog titled 'User Electronic Agreement' is open, displaying a certification statement and four numbered terms. At the bottom of the dialog, there are 'Cancel' and 'Accept & Continue' buttons. 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

Step 8.2: Select 'Submit Report'

The screenshot shows the SAP Concur 'Manage Expenses' page with the 'Report Totals' modal dialog open. The dialog displays payment information for the company and employee, along with a summary of amounts. At the bottom, there are 'Cancel' and 'Submit Report' buttons. 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
Requested Amount: £6.75

Due Employee: £6.75
Total Paid By Company: £6.75

Owed Company: £0.00
Total Owed By Employee: £0.00

Buttons: Cancel, 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.

The screenshot shows the SAP Concur 'Manage Expenses' interface. A modal window titled 'Report Status' is open, displaying a green checkmark and the text 'Report Submitted'. Below this, it shows 'XX-D91-YYYYMM - Description' and '£6.75'. A red arrow points from the text 'Select 'Close'' to the 'Close' button in the modal. The background shows the 'Manage Expenses' page with a table of expenses.

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

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

The screenshot shows the 'Manage Expenses' page with a 'Report Library' section. A report card for 'XX-D91-YYYYMM -...' is displayed, showing the date '11/23/2024', the amount '£6.75', and the status 'Submitted'. Below the report card, there is an 'Available Expenses' section with instructions on how to upload receipts and a list of available expenses.

Report Library View: Active Reports [Create New Report](#)

XX-D91-YYYYMM -...
11/23/2024
£6.75
Due Employee: £6.75
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.
[Enable Expense Assistant](#) to allow unassigned expenses to be placed automatically in a report for you. [Learn More](#)

View: All Expenses [Upload Receipt](#) [View](#) [Edit](#) [Delete](#) [Combine Expenses](#) [Move](#)

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

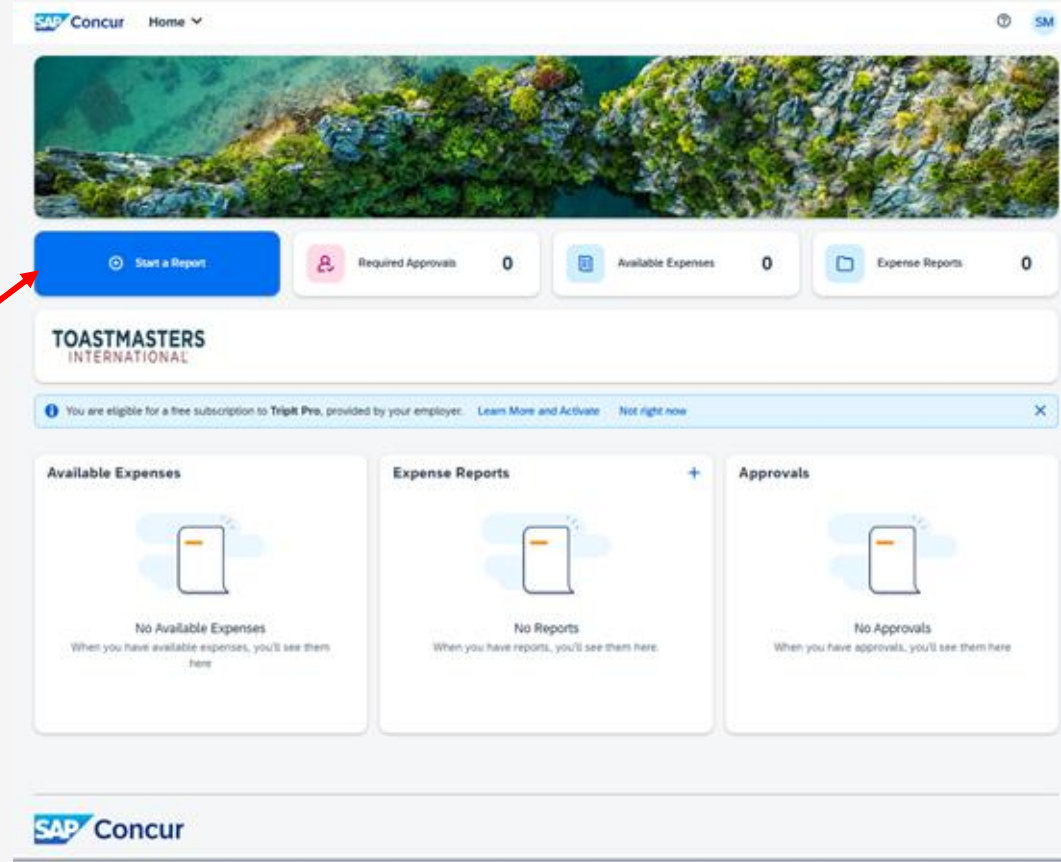
Note: This receipt/invoice must have a value equal or greater to the value of the incentive awarded (assuming the club intends to claim the full value)

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 to the 'Create Report' text in the bottom right corner of the form.

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')

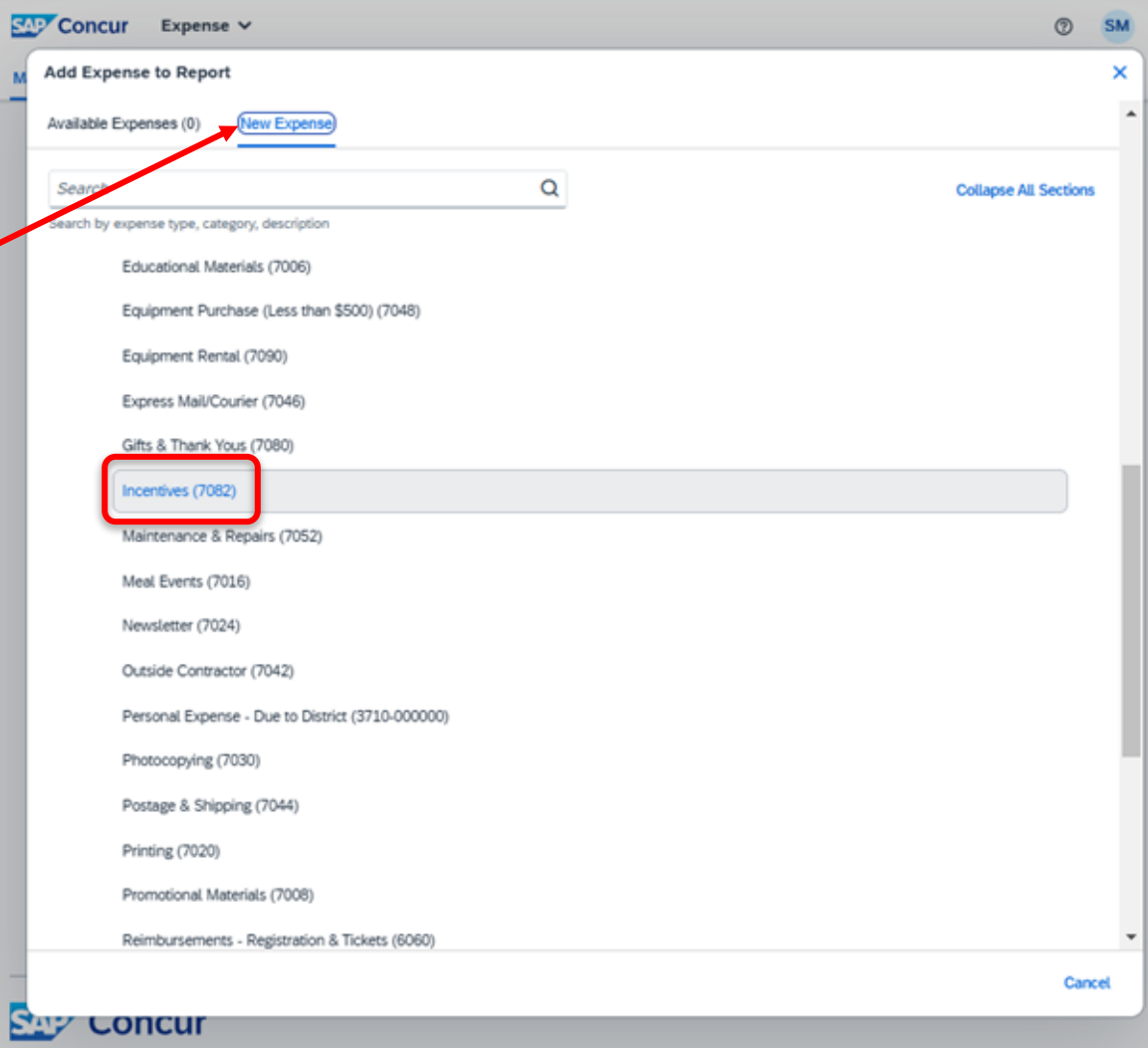
Click 'Add Expense'

The screenshot displays the SAP Concur 'Manage Expenses' interface. At the top, the header includes the SAP Concur logo, a dropdown menu for 'Expense', and a 'Manage Expenses' link. Below the header, the 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 buttons for 'Submit Report' and 'Delete Report'. It also indicates the report is 'Not Submitted' with a 'Report Number: 9A9K37'. Action links for 'Report Details', 'Print/Share', and 'Manage Receipts' are present, along with a 'View Available Receipts' link. The 'Expenses' section shows a list of actions: 'Add Expense' (highlighted with a red arrow), 'Edit', 'Delete', 'Copy', 'Combine Expenses', and 'Move'. Below this, a graphic of a smartphone with a yellow bar on its screen is shown, followed by the text 'No Expenses' and the instruction 'Add expenses to this report to submit for reimbursement.' The footer contains 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, there's a header with 'SAP Concur' and 'Expense'. Below it, the title is 'Add Expense to Report'. Under the title, it says 'Available Expenses (0)' and has 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 by expense type, category, description'. A list of expense types follows, including 'Educational Materials (7006)', 'Equipment Purchase (Less than \$500) (7048)', 'Equipment Rental (7090)', 'Express Mail/Courier (7046)', 'Gifts & Thank Yous (7080)', 'Incentives (7082)', '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)'. The 'Incentives (7082)' option is highlighted with a red box. At the bottom right, there is a 'Cancel' button.

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

The screenshot shows the SAP Concur 'New Expense' form. The 'Details' tab is active, displaying various fields for entering expense information. The 'Expense Type' is set to 'Incentives (7082)'. The 'Transaction Date' is '11/23/2024'. The 'Business Purpose' is 'The Great Golden Quarter 100%'. The 'Payment Type' is 'Cash/Out of Pocket'. The 'Amount' is '40.00'. The 'Currency' is 'UK, Pound Sterling (GBP)'. The 'Reporting Code' is '(583) Club Growth - Membership ...'. The 'Event Period' is 'N/A'. The 'District' is '(D91) District 91'. The 'Subsidiary' is 'District'. The 'Comment' is 'Hallmark Speakers - The Great Golden Quarter 100%'. The 'Receipt' tab is also visible on the right, showing a placeholder for a receipt upload.

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

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

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

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

Receipt



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'. Below the title, it says 'Not Submitted | Report Number: 9A9K37'. There are buttons for 'Submit Report', 'Copy Report', and 'Delete Report'. A section titled 'Expenses' contains a table with columns: 'Comment', 'Receipt', 'Payment Type', 'Expense Type', 'Vendor Details', 'Date', and 'Requested'. The table has one row with the following data: 'Cash/Out of Pocket', 'Incentives (7082)', '11/23/2024', and '£40.00'. A red arrow points from the 'Edit' option in the dropdown menu to the 'Step 6.5: Edit Expense' text.

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 * 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 X Subsidiary * District X

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 * 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 X Subsidiary * District X

Comment 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, .gif, .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

Incentives (7082) £40.00

11/23/2024

Save Expense Delete 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 - Membershi... 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

DISTRICT 91 TOASTMASTERS
CONGRATULATIONS
Hallmark Speakers

This VOUCHER is valid for use as a receipt in your CONCUR claim for the reimbursement of £40 towards Great Golden Quarter.

STEVE YEAT, DTM, HSE District Director DENISE WILLIAMS, DTM Program Quality Director DEENA MENON, DTM Club Growth Director

CONTACT US BUT DON'T FORGET TO SAY HELLO

Receipt
13.png

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: **SM-D91-202411-Incentive-GGQ £40.00**. The status is 'Not Submitted' with a report number of 9A9K37. A red arrow points from the 'Submit the Report' button to the text 'You are ready to \'Submit the Report\' for approval!'. Below the header, there is a table of expenses with one line item: 'Cash/Out of Pocket' for 'Incentives (7082)' dated '11/23/2024' for an amount of '£40.00'. The footer includes the SAP Concur logo, service status (US2), contact support, cookie preferences, and a copyright notice for 2024.

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

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 'User Electronic Agreement' dialog box. A red arrow points from the title 'Step 8.1: Select 'Accept & Continue'' to the 'Accept & Continue' button. The dialog box contains the following text:

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

Background: Expense report details for SM-D91-2024, Not Submitted, Report Number. Table with columns: Comment, Receipt, Payment Type, Expense Type, Vendor Details, Date, Requested. Row 1: Cash/Out of Pocket, Incentives (7082), 11/23/2024, £40.00.

Step 8.2: Select 'Submit Report'

The screenshot shows the SAP Concur 'Report Totals' dialog box. A red arrow points from the title 'Step 8.2: Select 'Submit Report'' to the 'Submit Report' button. The dialog box displays the following information:

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

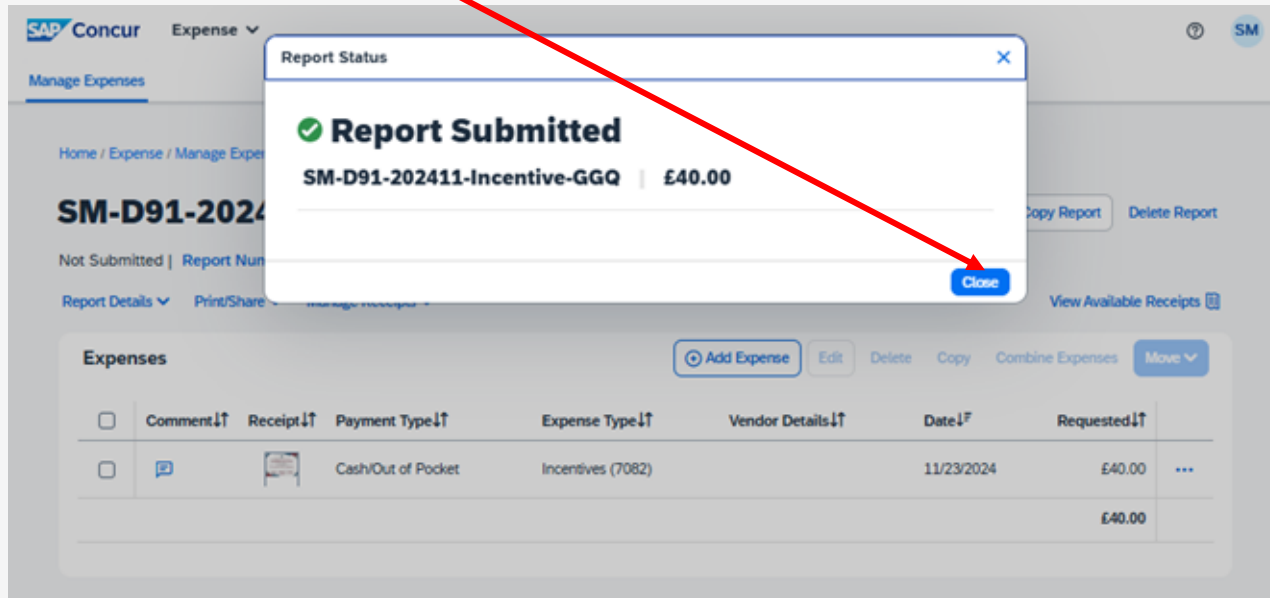
Buttons: Cancel, Submit Report

Background: Expense report details for SM-D91-2024, Not Submitted, Report Number. Table with columns: Comment, Receipt, Payment Type, Expense Type, Vendor Details, Date, Requested. Row 1: Cash/Out of Pocket, Incentives (7082), 11/23/2024, £40.00.

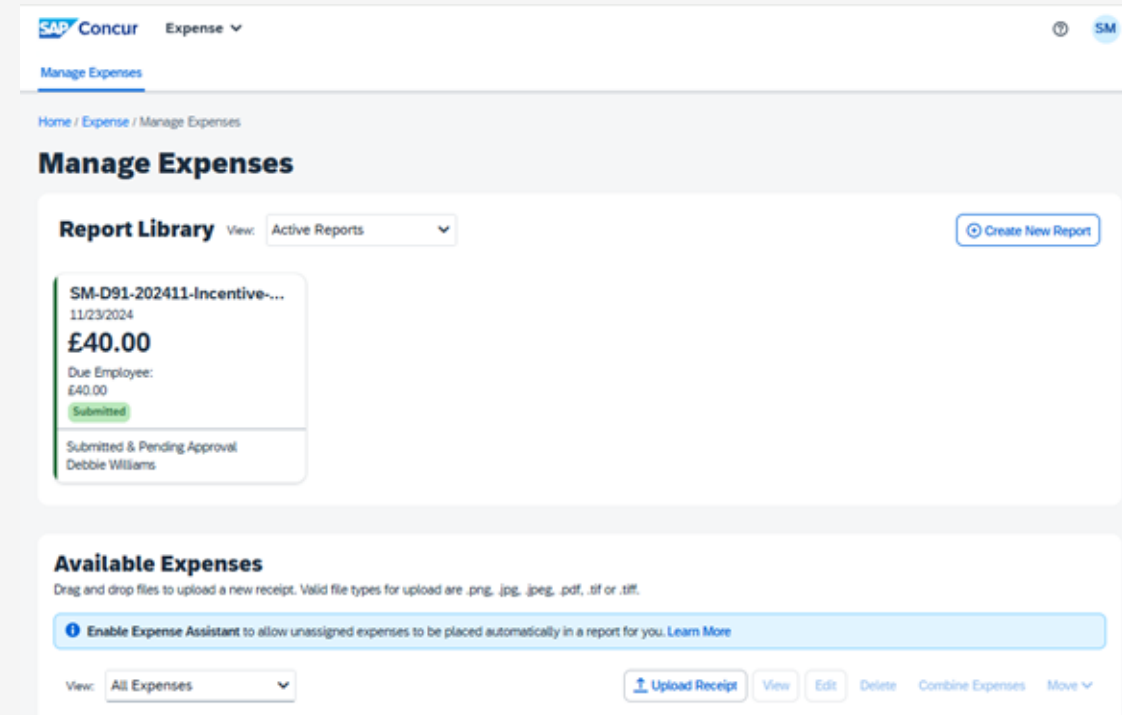
Submitting a Claim for a District Incentive: **Step 9**

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

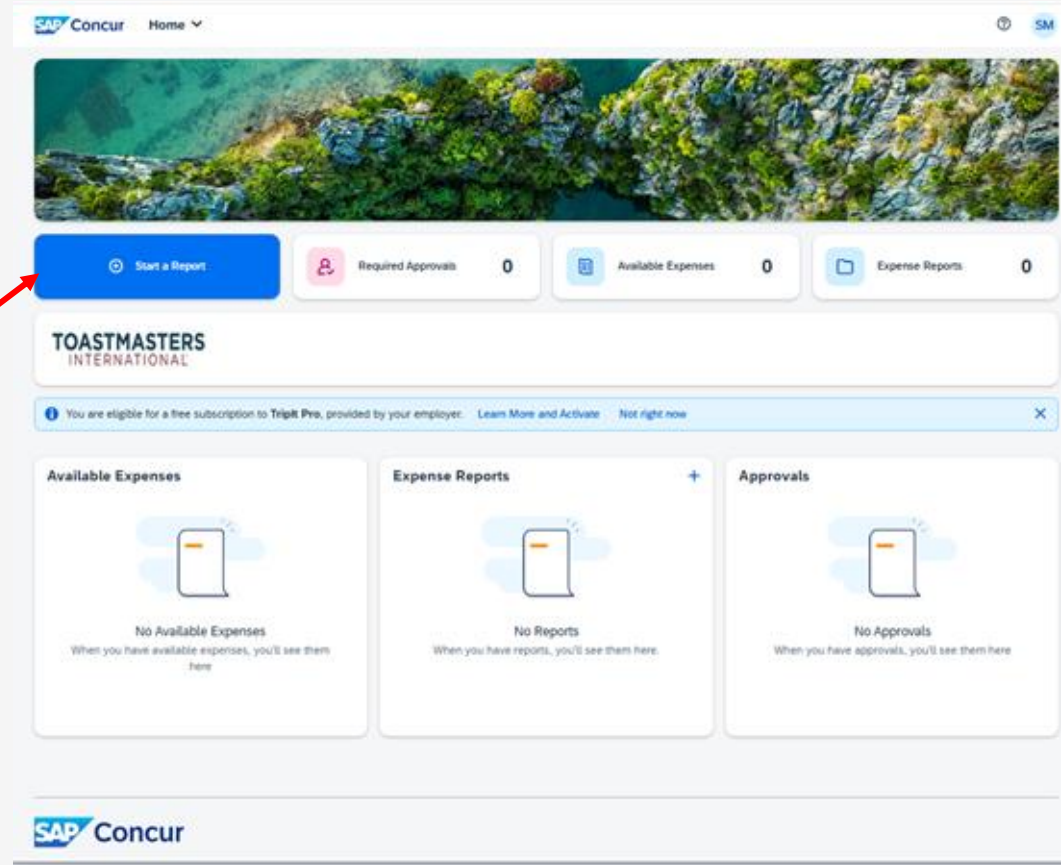
1. Click on **START A REPORT**
2. Next enter a **REPORT NAME** in the following format: **XX-D91-YYYYMM-Description**
Where **XX** = your initials, **YYYY** = Year, **MM** = Month & **Description** = Reason for Expense
For example: SM-D91-202411-Hallmark Promo Mats
3. **ADD EXPENSES** – complete all 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 the text 'Marketing/Promotional materials for Hallmark Speakers.' At the bottom right, there are 'Cancel' and 'Create Report' buttons. A red arrow originates from the 'Create Report' button in the screenshot and points to the 'Create Report' button in the instructions section of the slide.

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 shows the SAP Concur interface for managing expenses. At the top, there's a header with the SAP Concur logo and a dropdown menu for 'Expense'. Below this, a breadcrumb trail reads 'Home / Expense / Manage Expenses / SM-D91-202411-HallmarkPromoMats'. The main heading is 'SM-D91-202411-HallmarkPromoMats £0.00'. To the right of this heading are two buttons: 'Submit Report' and 'Delete Report'. Below the heading, it says 'Not Submitted | Report Number: SVBQ27'. There are three links: 'Report Details', 'Print/Share', and 'Manage Receipts'. On the far right, there's a link 'View Available Receipts'. The main content area is titled 'Expenses' and contains a button 'Add Expense' with a plus icon. To the right of this button are links for 'Edit', 'Delete', 'Copy', 'Combine Expenses', and 'Move'. Below the 'Expenses' section, there's a graphic of a smartphone with a yellow bar on the screen, and the text 'No Expenses'. At the bottom, it says '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, there's a section 'Add Expense to Report' with a close button (X). Under this section, it says 'Available Expenses (0)' and a button labeled 'New Expense'. Below this 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 rectangle. At the bottom right of the dialog box is a 'Cancel' button. Below the dialog box, there is a footer text 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 v

Transaction Date *
11/23/2024

Business Purpose *
Promo materials for Hallmark

Enter Vendor Name

City of Purchase

Payment Type *
Cash/Out of Pocket v

Amount *
27.48

Currency *
UK, Pound Sterling (GBP) X v

Reporting Code * 1
(560) Marketing - Other X v

Event Period * 2
N/A X v

District 1
(091) District 91

Subsidiary * 2
(091A) Area X v

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

Save Expense Cancel

Hide Receipt

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'

The 'New Expense' form is shown with the 'Details' tab selected. The form fields include: Expense Type (Promotional Materials (7008)), 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)), Reporting Code ((560) Marketing - Other), Event Period (N/A), District ((091) District 91), and Subsidiary ((091A) Area). A comment field contains: 'A range of Promo Materials (X, Y & Z) for promoting Hallmark Speakers in the local area.' The 'Attach Receipt' modal is open, showing 'Available Receipts (0)' and an 'Upload New Receipt' button. A red arrow points from the 'Step 6.1' text to the 'Upload New Receipt' button.

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

The 'New Expense' form is shown with the 'Details' tab selected. The 'Receipt' modal is open, displaying a receipt from 'PROMO MATS R US' for 'Client: Hallmark Speakers' with an 'Invoice: £27.48'. The receipt is titled 'PROMO MATS R US.pdf'. A red arrow points from the 'Step 6.3' text to the 'Save Expense' button at the bottom of the form.

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).

The screenshot shows the SAP Concur 'Manage Expenses' page. At the top, the breadcrumb trail is 'Home / Expense / Manage Expenses / SM-D91-202411-HallmarkPromoMats'. The main heading is 'SM-D91-202411-HallmarkPromoMats £27.48'. Below this, it says 'Not Submitted | Report Number: SVBQ27'. 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', 'Manage Receipts', and 'View Available Receipts'. The 'Expenses' table has columns: Comment, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. It contains one row for 'Cash/Out of Pocket' with an expense type of 'Promotional Materials (7008)' and a date of '11/23/2024', with a total requested amount of £27.48.

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

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 displayed, containing 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 displayed, showing 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.

The screenshot shows a 'Report Submitted' confirmation dialog box overlaid on the SAP Concur 'Manage Expenses' page. The dialog box 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'. A red arrow points from the text 'Select 'Close'' to the 'Close' button in the dialog box. The background page shows the 'Manage Expenses' section with a table of expenses.

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

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

The screenshot shows the 'Manage Expenses' page in SAP Concur. The page title is 'Manage Expenses'. Below the title, there is a 'Report Library' section with a dropdown menu set to 'Active Reports' and a 'Create New Report' button. A report card is displayed for 'SM-D91-202411-HallmarkPromoMats' with a date of '11/23/2024' and 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 is an 'Available Expenses' section with instructions on how to upload receipts.

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.