SAP CONCUR How-To Sheets
Submitting an expense report that includes corporate AMEX charges

This how-to sheet outlines the steps required to:

• Submit an expense report for reimbursement that includes expenses paid for with a corporate AMEX card.

You must have a corporate AMEX card linked to your SAP Concur account to use this how-to sheet.

• STEP 1: If you do not have a corporate AMEX card, you can request one from Procurement Services.
• STEP 2: Contact Financial Systems to link the corporate AMEX card to your SAP Concur profile.

What is the SAP Concur Travel and Expense Reimbursement system used for?

• Requesting reimbursement for expenses (i.e. either travel or non-travel) that you have paid out of pocket (i.e. using your own personal money).

Governing Policies can be found on the University Secretariat’s site:

• Travel and Related Expenses
• Hospitality and Working Meal Expenses
• Alcohol and Cannabis Use Policy

Last updated February 28, 2024.

THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP

1. When you have linked your corporate AMEX card to your SAP Concur account, transactions will be added to the ‘Available Expenses’ section within several business days after the purchase.

   NOTE: Each time a new AMEX transaction is added to your available expenses, you will receive an email with the subject line ‘Company Card Notification for <YOUR NAME>’.

   From the landing page, click on the black ‘Available Expenses’ text.
IMPORTANT! Attach itemized receipts to related AMEX transactions BEFORE you begin Step 2!

AMEX transactions that are added to ‘Available Expenses’ will NOT include itemized receipts. Before you proceed to Step 2 of this how-to sheet, use one of these time saving options to attach an itemized receipt to the related AMEX transaction:

1. **Forward emailed receipts:** If you’ve received the itemized receipt via email, forward it to receipts@expenseit.com from a verified email address. The ‘Using SAP Concur features to create expense lines for you’ how-to sheet has step-by-step instructions. The system will attempt to match it with the existing AMEX charge.

2. **Capture paper receipts:** Use the SAP Concur app to take a photo of an itemized paper receipt. The ‘Using SAP Concur features to create expense lines for you’ how-to sheet has step-by-step instructions. The system will attempt to match it with the existing AMEX charge.

2. Choose the expense/s you want to add to a report.

   You can add all of the expenses at once by clicking the box in the header row OR you can click a box beside an individual expense.

   In this example, we are bringing one of the expenses over.

3. Click on the blue ‘Move to’ button to add the expenses to either a new or existing report.

   In this example, we’ll add it to an existing report by clicking on ‘December 2023 Expenses’ in the drop-down menu.

   **TIP:** The ‘Submitting an expense report’ how-to sheet shows you how to begin a new report.
4. Click on each expense line to:
   1. ensure that the expense type is accurate, and
   2. if you have not already used SAP Concur to do so, attach related itemized receipts.

5. Ensure that the ‘Expense Type’ field is correct.
   If necessary, click on the drop-down arrow to choose an accurate expense type.
6a. Attaching Itemized Receipts

If haven’t used the time saving tip described in step 2, drag and drop the itemized receipt onto the blue ‘Receipt’ window.

**TIP:** For this expense type (i.e. Conference/Registration Fees), you must also attach the conference itinerary. You could drag and drop both the itemized receipt and the itinerary at the same time.

6b. Attaching Itemized Receipts

Click on the blue ‘Save Expense’ button.
7. Continue to add expense lines to the report as needed by clicking on the blue ‘Add Expense’ button and following the prompts.

8. After you have included all expenses and attached all related documentation (e.g. itemized receipts), click on the blue ‘Submit Report’ button and follow the prompts.

**TIP:** Depending on the language preference you’ve chosen, ‘Submit Claim’ may be used instead of ‘Submit Report’.

---

**What next?**
- Visit the carleton.ca/facts/travel to find more how-to sheets.
- Questions about the system? Email financial.systems@carleton.ca.