Using SAP Concur features to create expense lines for you

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This how-to sheet outlines three efficient methods to get SAP Concur to turn itemized receipts into expense lines for you.

1. taking photos of itemized receipts using the App
2. emailing itemized receipts to receipts@expenseit.com
3. dragging and dropping itemized receipts into available expenses from your desktop

The languages supported by ExpenseIt:

- ExpenseIt can process all captured receipts.
- While ExpenseIt can recognize receipts in many languages, you may see less accurate predictions in countries where we have low usage volume.

Important notes:

- Retain paper receipts until you have received payment.

**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

1a. **Taking photos of itemized receipts using the App**

This example uses screen captures from an iPhone. Your device may look slightly different.

From the SAP Concur App, tap the blue camera button.

TIP FOR <u>DELEGATES</u>: When you are acting on behalf of a claimant, switch to their profile BEFORE you take the photo.
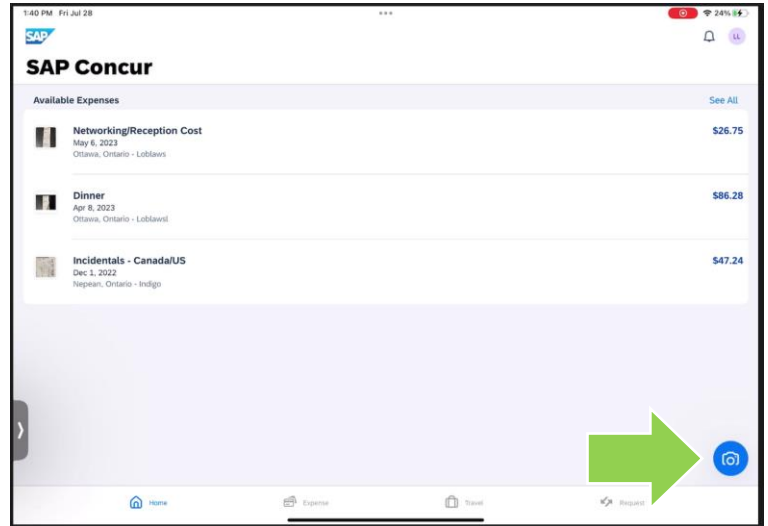
1b. Take a photo of the receipt.

In this example, one photo captures the entire receipt ( ).

If the receipt cannot be captured with a single photo, multiple photos can be taken and combined into a single receipt ( ).

TIP: Avoid taking the photo of a white receipt on a white surface. Contrast will help the App capture the image.

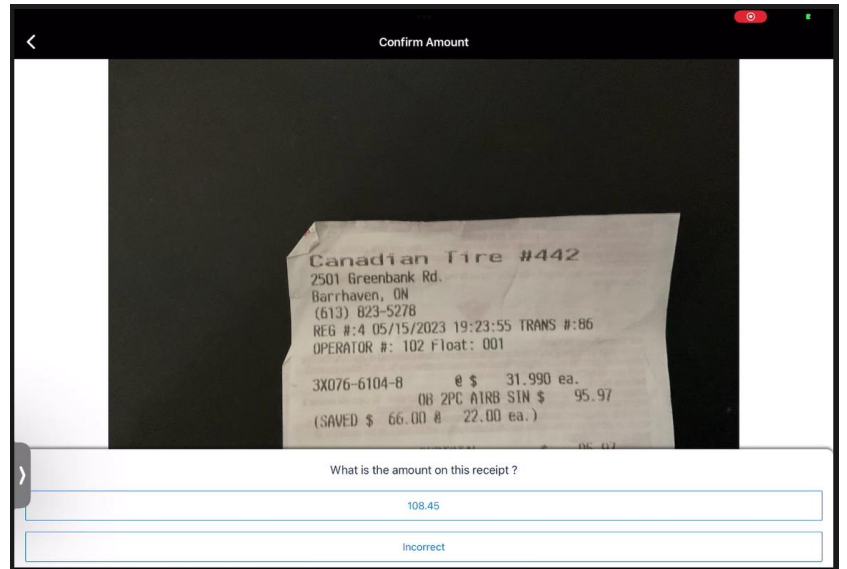1c. Tap the white **'Done'** text.

IMPORTANT: Make sure that the captured image is legible. Illegible receipts will not be accepted.
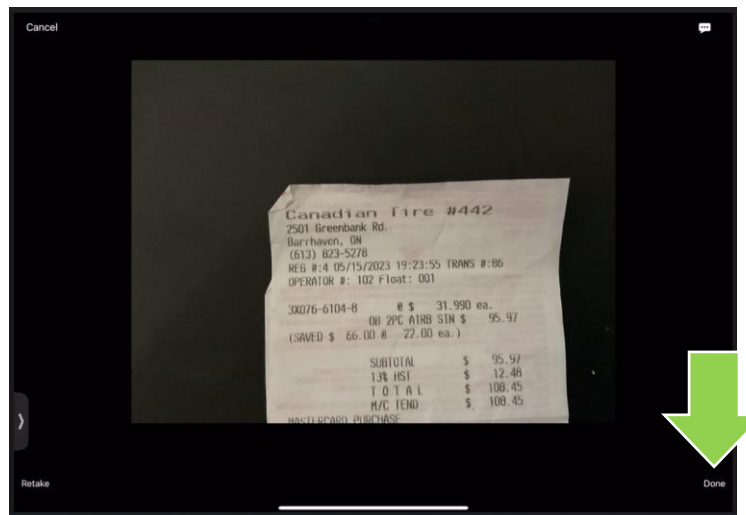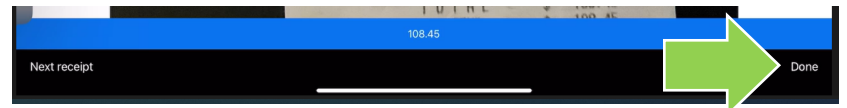
| 1d.	The SAP Concur App will use Optical Character Recognition (OCR) to read the amount of the receipt.	
	Review the amount. If incorrect, tap the 'Incorrect' button and follow the prompts to adjust the amount.	
	When you are satisfied, tap 'the correct amount' (e.g. 108.45 in this example).	
	Tap the white '**Done**' text to complete this step.	

1e.	List of OCR analyzed expenses lines will be displayed.	
	Tap on the newly created expense line.	
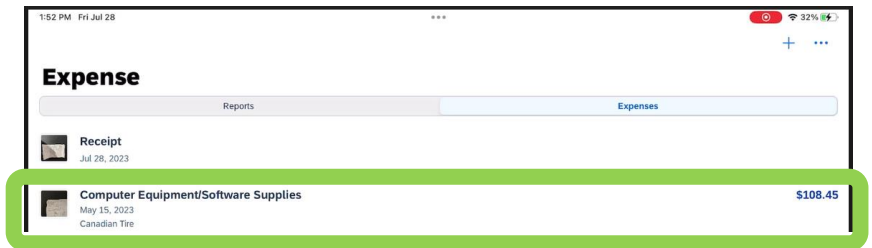
1f. Review the pre-populated information to ensure that it is correct. Most fields can be edited.

At this stage, the expense line can be added to a report by tapping the blue 'Move to Report' button.

TIP: Even if you are not moving the expense line to a report, it is a best practice to reivew the details while you have the receipt in hand.

IMPORTANT! Do not thow your receipt away. Retain the paper receipt until you have received payment.

TIP: When travelling, you may not choose to pay for roaming charges on your mobile device. Steps 1a through 1d can be completed without using your data plan. Once you have access to Wi-Fi you can retrieve the expense from your 'Expense Library' and create your report.

2a. **Emailing itemized receipts to receipts@expenseit.com**

When you email receipts to receipts@expenseit.com **using a verified email address***, the SAP Concur App will use Optical Character Recognition (OCR) to create an expense line with a receipt attached.

From your inbox, forward the email to receipts@expenseit.com.

TIP FOR DELEGATES: If you are forwarding a receipt for a claimant, include their verified email address in the email's subject line.

* Review the 'Important tasks to complete in your profile' how-to sheet and/or contact financial.systems@carleton.ca if you require support verifying a personal email address.
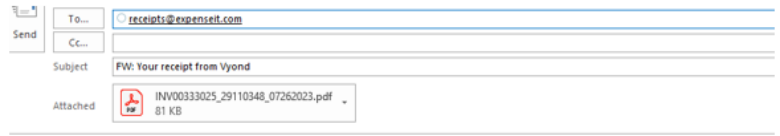
From: The Vyond Team <support@vyond.com>
Sent: July 26, 2023 5:07 AM
To:
Subject: Your receipt from Vyond

2b. Return to the SAP Concur App or your desktop to retrieve the expense line.
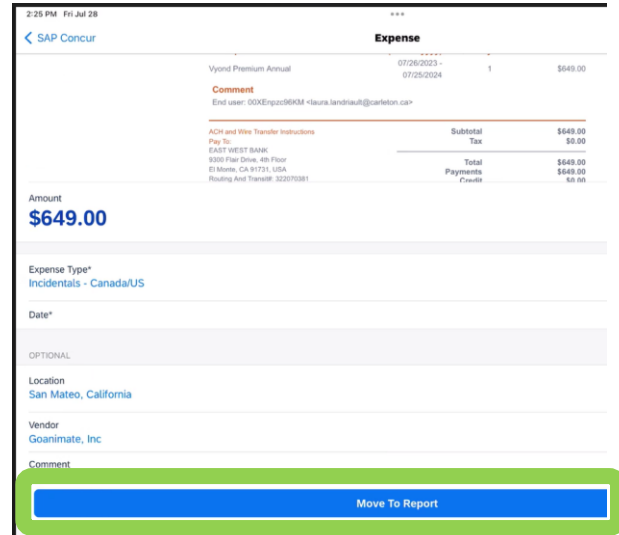
Tap on the expense line that matches the image of the receipt you just forwarded to receipts@expenseit.com.
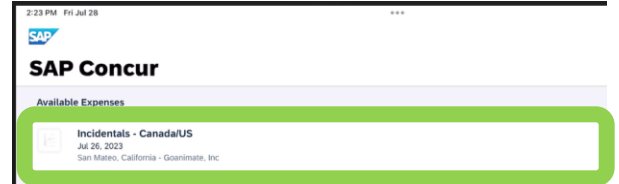
2c. OCR has populated the Expense fields.

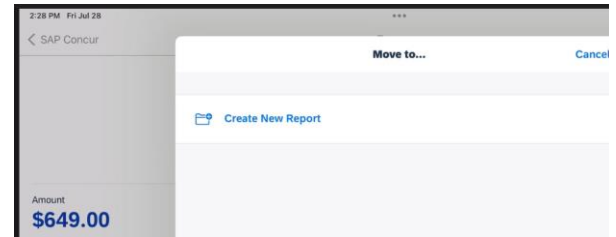Review the fields. Some corrections may be required.

When you are satisfied that the details are correct, tap on the blue '**Move to Report**' button.

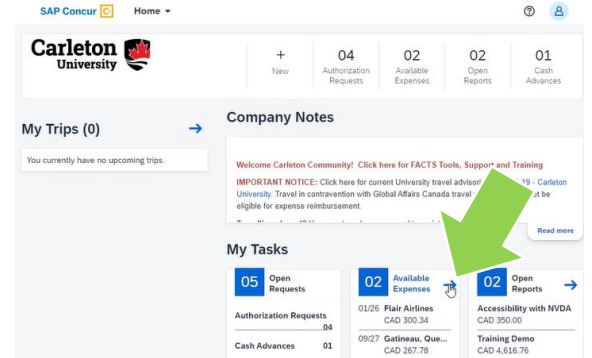| 2d. | To add this expense to **an existing report**, tap on the title of an existing report name.

OR

Tap on the 'Create New Report' text to add the expense to a **new report**. | |

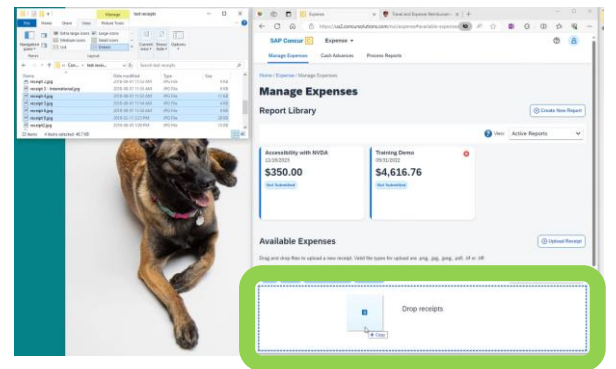| 3a. | **Dragging and dropping receipts into available expenses from your desktop**

You have SAP Concur's landing page open on your desktop computer.

Click on the blue **'Available Expenses'** text. | |

| 3b. | Drag and drop one or more itemized receipts onto the area below 'Available Expenses'.

IMPORTANT! Do not bundle receipts into one file. There should be one itemized receipt per expense line. | |

| 3c. | To add one or more of the new expense lines to a report … | |
| | … click the box beside either a row to select one expense line OR the box in the header to select all the rows to add to an expense report. In this example, all expense lines have been selected. | |
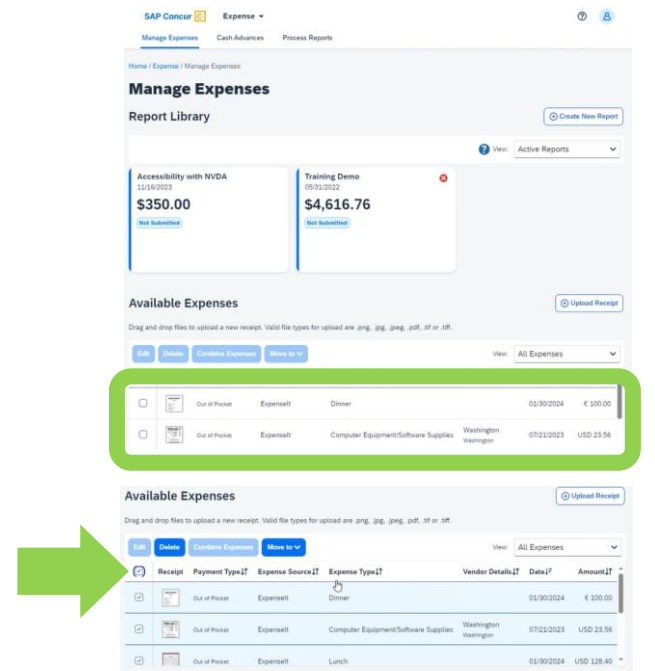
What next?

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