Concur Guide for Receipts

HARVARD UNIVERSITY

In Concur, there are three methods for capturing and attaching a receipt to an expense report. Concur allows users to upload receipts via the Concur mobile app, scan and upload receipts, or email individual receipts. This job aid will assist you with the different methods as well as the process for viewing receipts in Concur.

FAQS and Other Training Materials: travel.harvard.edu/concur

24 Hour Concur User Support: 866-793-4040

Harvard User Support: concurhelp@harvard.edu or 617-495-7760, option 1

Mobile App Receipts

Open app and click **Receipt**	Click **[camera]** to take a photo of the receipt	Click **Done** to save and finish or click **Expense** to enter additional details	Enter **Type** and **Amount** of the expense. Enter **Comments** for 'Who', 'What' and 'Why' then click **Save**

By using the Concur Mobile App, a reimbursee can enable their account to capture receipts that will automatically load to their Concur receipt library. There are 2 options for capturing receipts:

Option 1: If a user captures a receipt then clicks **Done**, it will be uploaded to the **Receipt Library**

Option 2: If the user captures a receipt then clicks **Expense**, it will be uploaded to **Available Expenses** and display the [icon] icon in the **source** column

Email Receipts

Email Receipts to a Reimbursee's Account if you do have access to their email

In order to use this functionality, the email for the reimbursee must first be verified in Concur and the delegate must have access to the account to send emails on behalf of the reimbursee.

1. **Open** the receipt email in the verified email account of the reimbursee
2. **Forward** the email to **receipts@concur.com**

Email Receipts to a Reimbursee's Account if you do not have access to their email

In order to use this functionality, both the email of the delegate and reimbursee must first be verified with Concur.

1. **Create** an email (with the receipt in the body of the email, or as an attachment)
2. In the **subject line**, enter the employee's verified email address
3. **Send** the email to **receipts@concur.com**

Note: To verify an email, refer to the profile settings instructions. If an email with an attachment is sent, only the attachment will be uploaded to Concur. **Attachment formats accepted include: PDF, JPG, HTML, TIF or TIFF.**

Upload Receipts From Desktop

You can create electronic images of receipts by scanning them then uploading the image(s) from your desktop to Concur. You can upload multiple receipts to Concur, but each image can only be associated with one expense transaction (line item).

Upload Receipts via Desktop

1. On the Concur home page of the reimbursee, click **Upload Receipts** at the top of the page
2. Click the **Upload** button
3. Click **Browse**
4. Click **Upload**, then click **Close.** The receipt will now appear in the Available Receipts Library

Upload Multiple Receipts via Desktop

1. On the Concur home page of the reimbursee, click **Available Expenses**
2. Scroll down to **Available Receipts**
3. Open your computer directory and select the receipts
4. Drag the receipts to the **Upload New Receipt** box
   The receipts will now appear in the Available Receipts Library

Attach Receipts

There are several ways to attach receipts to an expense report. Individual receipts can be attached to the respective transaction or receipts can be attached at the header-level of the expense report.

Attach Receipts at Transaction Level

Option 1: While in the detailed screen of the transaction, click on the **Available Receipts** link. Find the appropriate receipt, then click the icon

Option 2: While in the detailed screen of the transaction, click on the **Attach Receipt** button. Click on the appropriate receipt. Then click **Attach**

Attach Receipts at Header Level

1. While in the expense report, click the **Receipts** dropdown and then select **Attach Receipt Images**
2. Click **Browse**
3. Click **Upload**, then click **Close**

View Receipts

View Available Receipts

1. On the Concur home page of the reimbursee, click **Upload Receipts** at the top of the page
2. This page shows all of the available receipts in the Receipt Library and allows you to upload additional receipts

View Attached Receipts

There are multiple ways to view receipts:
1. Hover over the icon
2. Click the **Receipt Image** tab of an expense
3. Click the **Receipts** dropdown and select **View Receipts in a New Window** or **View Receipts in the Current Window**. This will show all receipts, including receipts attached to the report header in the order they were attached to the report

Other Tips

- When using the Concur Mobile App, you can take a photo of itemized and final receipts side-by-side
- We recommend the reimbursee writes the business purpose and list of attendees (if less than 5) at the top of the meal (itemized or final) receipt to assist the delegate with expense report entry and reconciliation
- Approvers are required to view receipts per the ROPPA policy *(Visit the [Financial Policy Office website](#) to view the full policy)*
- Please reference the ***Concur: Receipts*** section in the FAQs for additional information on capturing, attaching and viewing receipts in Concur