Title: Entering multiple expenses in 1 Expense Report
Team Responsible for Procedure: Business Services
Owner Name: Faviola Cardenas
Date Created: October 8, 2018
SOP # [team #3 SOP# _ Revision 1]: 2_452_3

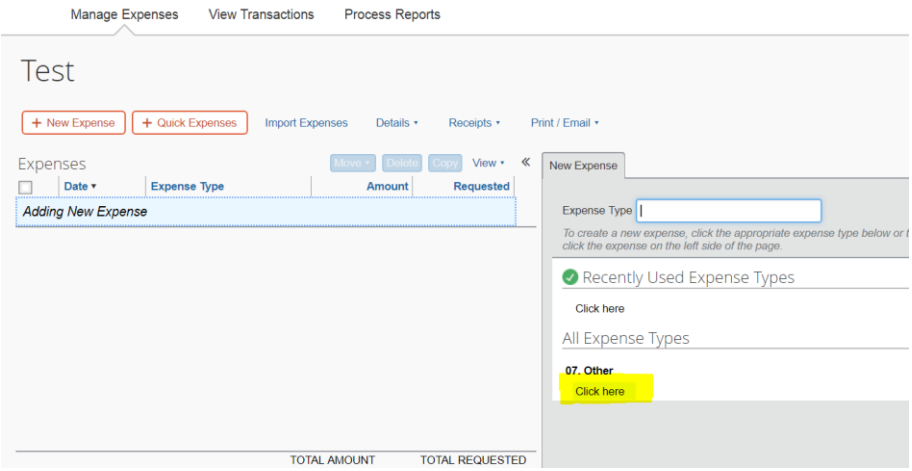
Purpose: Entering multiple expenses in 1 Expense Report.

Scope/Key Stakeholders: SWE
Applicable Forms: None
Definitions: None
Tools/Equipment/Software:

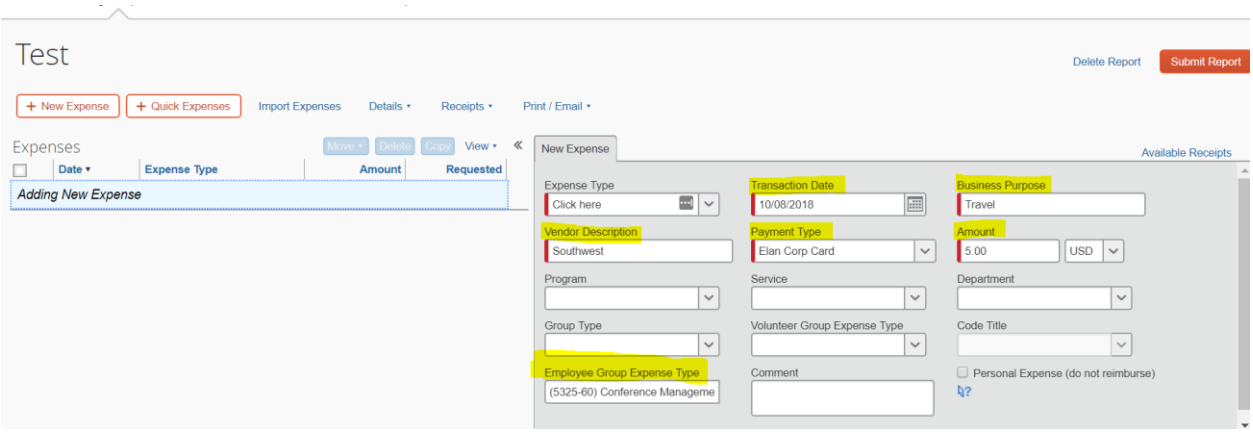
Procedure:

The below SOP is just a reminder of how often you should be submitting expense reports and how to include multiple expenses in 1 report.

1) To begin, you need to click on the text that says ***Click here*** as shown on the picture below.



2) The following dialogue box below should appear and only fill out all the fields that are highlighted in yellow.



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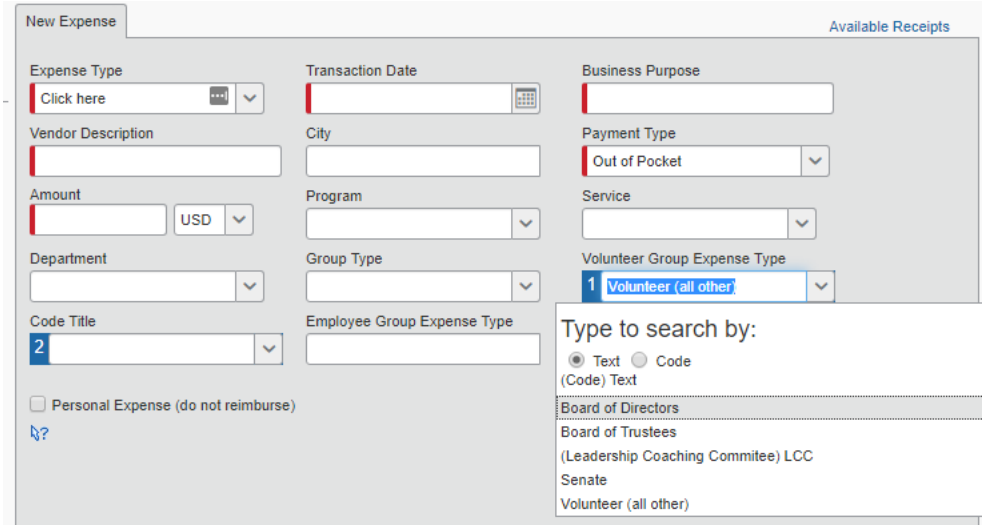
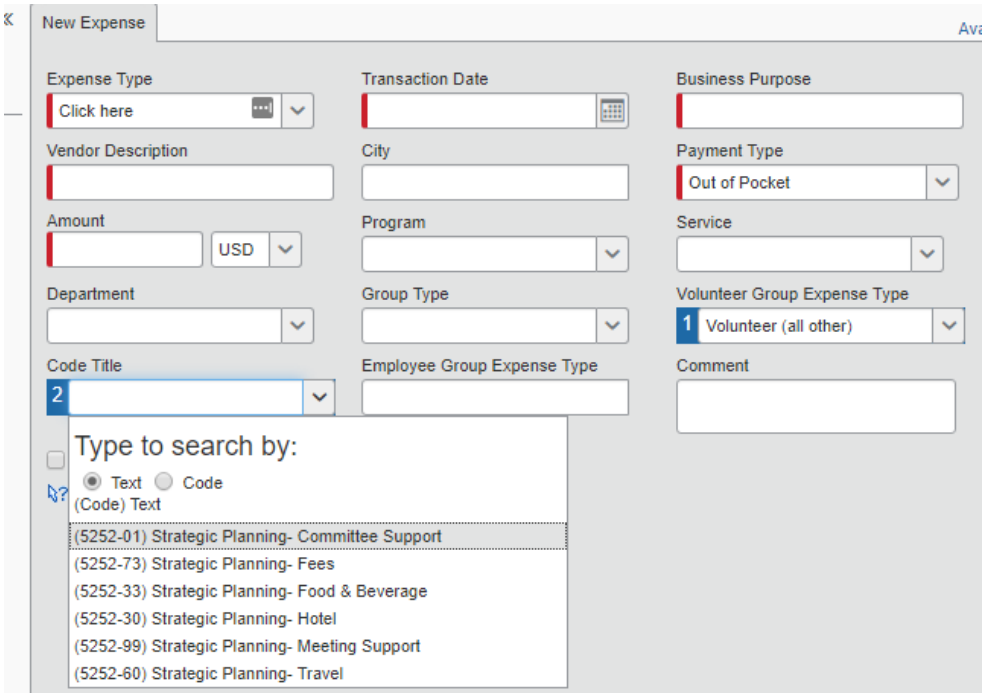
3) If you are not an employee of SWE, then please fill out the Volunteer Group Expense Type and Code Title accordingly. You can then leave the Employee Group Expense Type blank.



a. The Volunteer Group Expense type that you select is what will determine the Code Titles that appear as options.



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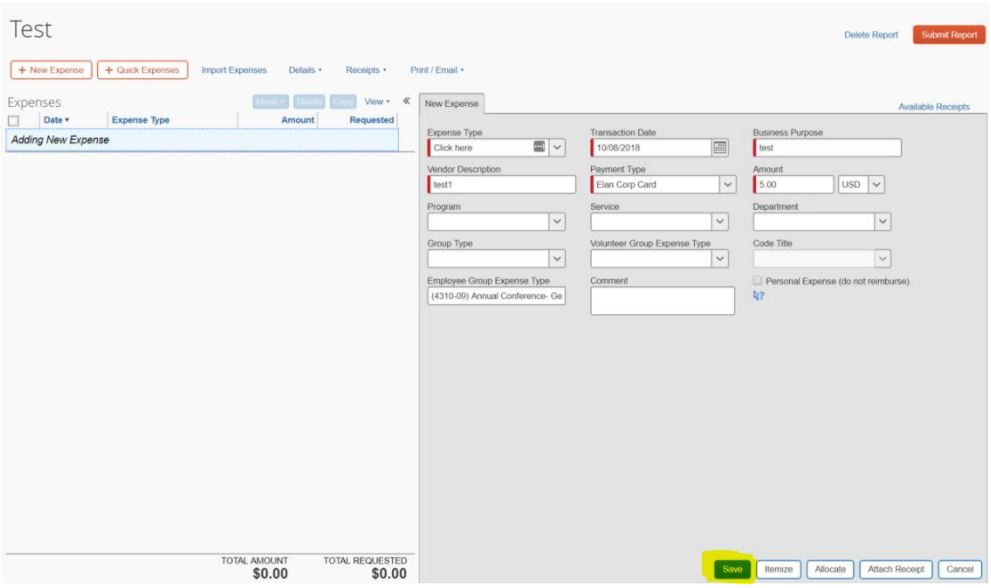
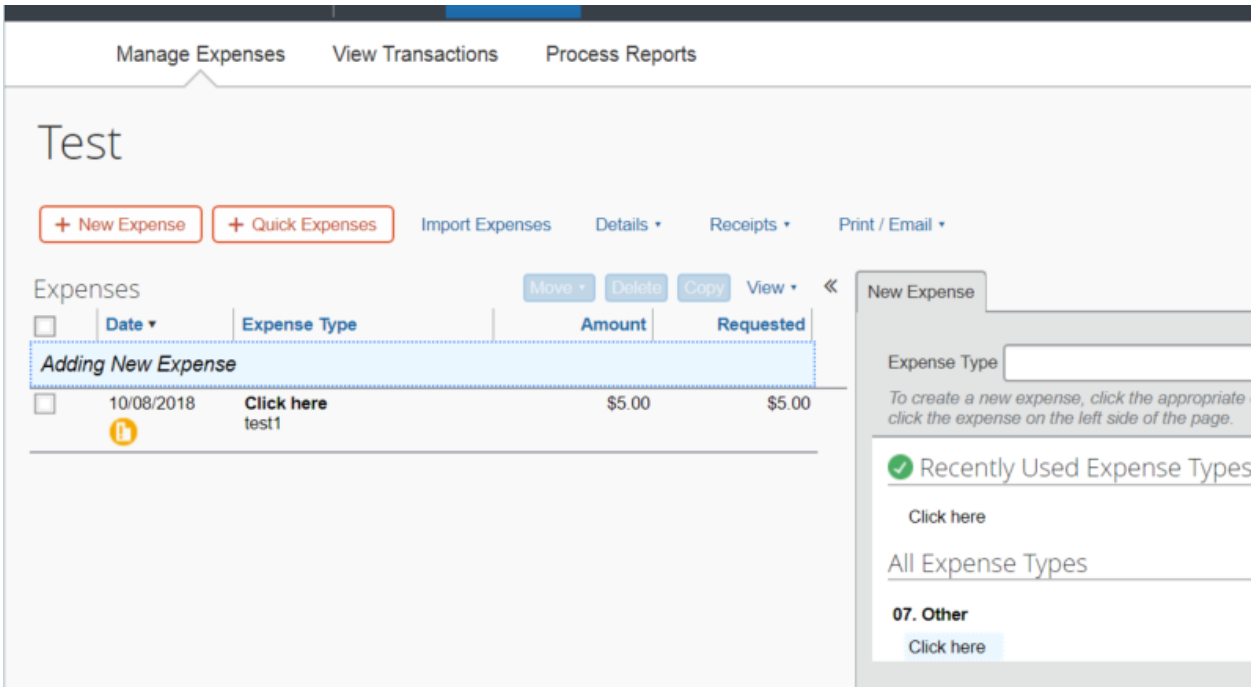
4) Once all the required fields are filled in, and you have attached the receipts that you need (please refer to the video for further details), make sure you click on save.



5) When you do, you will see the expense you just created on the left of your screen as shown below.



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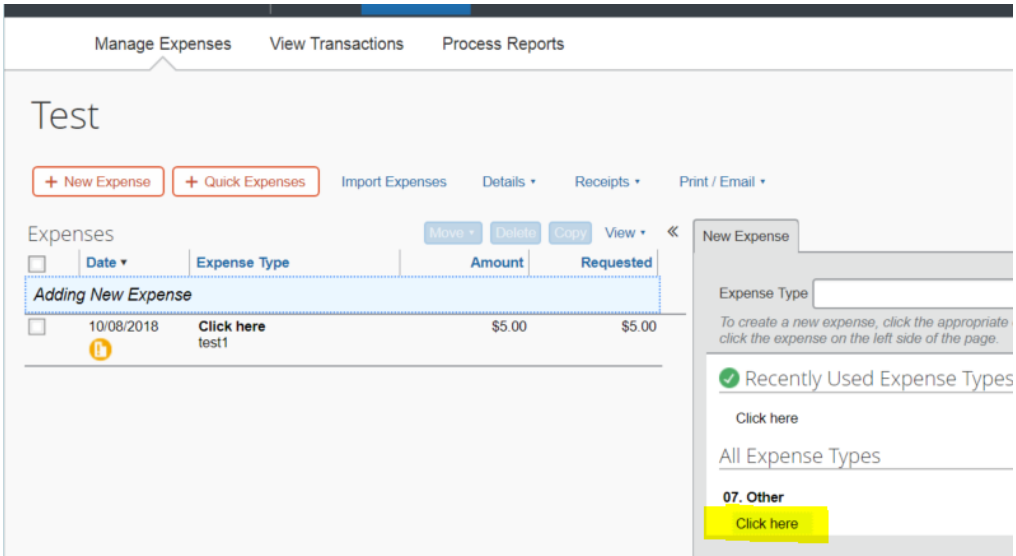
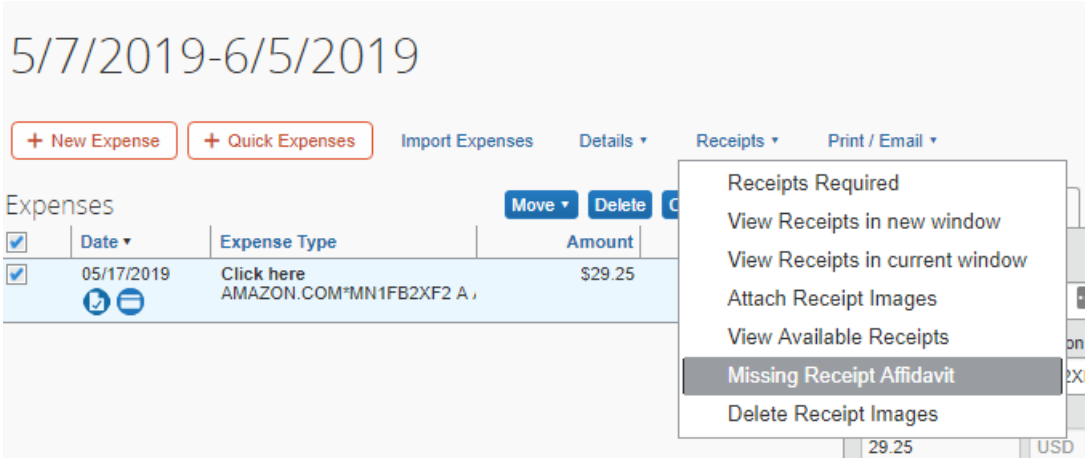
6) To continue to add additional expenses to your expense report, make sure you click on the ***Click here*** button that under the **07.Other** text.



7) If you ever have any transactions for which you don't have a receipt for, click on the expense with the missing receipt, click on the receipts drop down menu and then select missing receipt affidavit to create a receipt.

NOTE: You can only create missing receipts for transactions under $75.00.



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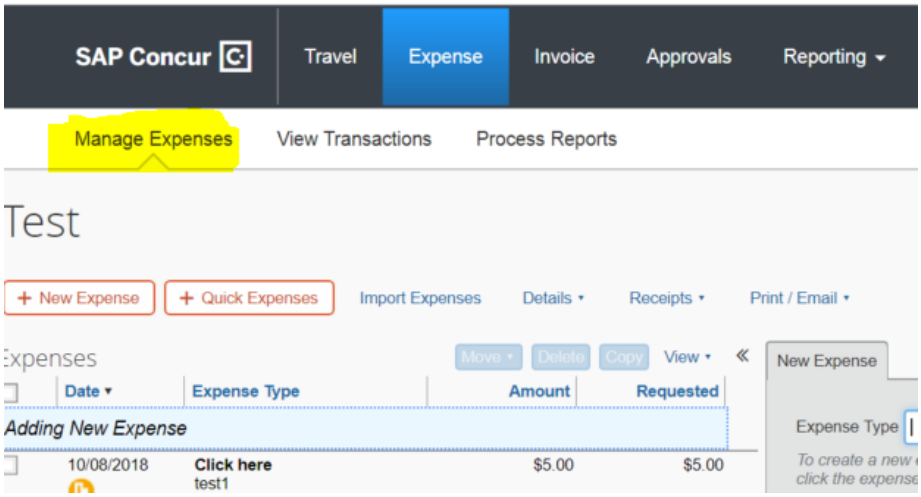
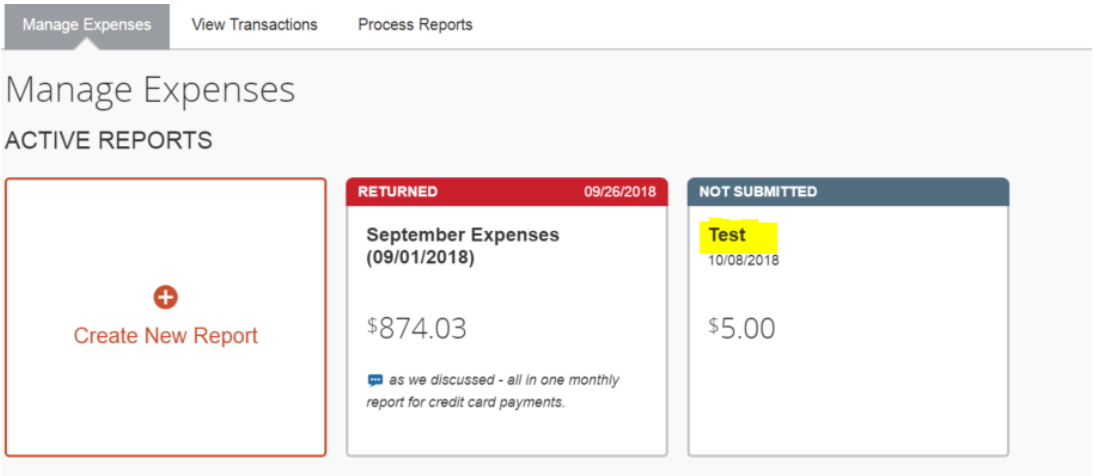
8) To see all expenses that you currently have pending and have not submitted, simply click on Manage Expenses.



9) This takes you back to the Expense tab and shows all your current Expenses. Each expense is labeled and should tell you that status of the report. This lets you know what report you still haven't submitted.



NOTE: Please submit 1 Expense Report per month. This helps keep track of all your expenses made during that period.

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***All transactions that show on your credit card statement should match the ones in your expense report that you submit in Concur. (this is for SWE employees only)*

Transactions

Purchases and Other Debits

Post Date	Trans Date	Ref #	Transaction Description	Amount	Notation
10/09	10/08	8881	USPS.COM MOVER'S GUIDE 800-238-3150 TN	$1.00	
10/12	10/11	0015	JPS GRAPHICS CORPORATI 972-3859985 TX	$572.62	
10/18	10/17	3754	UBER TRIP OXCHG HELP.UBER.COM CA	$5.00	
10/18	10/17	3939	UBER TRIP OXCHG HELP.UBER.COM CA	$24.32	
10/19	10/17	4418	GOLD COAST DOGS TRIANG CHICAGO IL	$11.12	
10/22	10/21	7426	UBER TRIP POHHL HELP.UBER.COM CA	$5.00	
10/22	10/21	7401	UBER TRIP POHHL HELP.UBER.COM CA	$29.52	
10/23	10/21	7812	CARIBOU COFFEE CO #129 MINNEAPOLIS MN	$4.84	
			TOTAL THIS PERIOD	**$653.42**	

2018 Totals Year-to-Date	
Total Fees Charged in 2018	$0.00
Total Interest Charged in 2018	$0.00

Expenses View

Date	Expense Type	Amount	Approved
10/21/2018	Click here UBER TRIP POHHL HELP.UBER.CC	$29.52	$29.52
10/21/2018	Click here UBER TRIP POHHL HELP.UBER.CC	$5.00	$5.00
10/21/2018	Click here CARIBOU COFFEE CO #129 MINNE	$4.84	$4.84
10/17/2018	Click here UBER TRIP OXCHG HELP.UBER.C(	$24.32	$24.32
10/17/2018	Click here UBER TRIP OXCHG HELP.UBER.C(	$5.00	$5.00
10/17/2018	Click here GOLD COAST DOGS TRIANG CHIC	$11.12	$11.12
10/11/2018	Click here JPS GRAPHICS CORPORATI XXX-)	$572.62	$572.62
10/08/2018	Click here USPS.COM MOVER'S GUIDE XXX-)	$1.00	$1.00

****Please contact Concur Administration Support for additional questions/help: 1-877-901-4960***