

Concur Quick Reference Guide

Section 1: Getting Started

Step 1: Log on to Concur Travel & Expense

1	In the User Name field, enter your <i>user name</i> (e.g. <i>jdoe@lvbrands</i>).
2	In the Password field, enter your <i>password</i> .
3	Click Login .

Section 2: Use Home

Step 1: Explore the available options

1	Locate Start a Report section.
2	Locate Upload Receipts section.
3	View the Required Approvals section. <i>This section appears only if you are logged on as an approver.</i>
4	Locate Available Expenses section.
5	Locate Open Reports section
6	Explore the Trip Search section.
7	Look at the My Trips section.
8	Explore the Company Notes section.
9	Look at the My Tasks section.

Section 3: Update Your Profile

Change your Profile – Profile Options page

1	Click Profile at the right top of the page.
2	On the Profile dropdown box, click Profile Settings .
3	On the Profile Options page, choose the appropriate item.

Step 1: Change your Password

1	On the Profile Options page, click Change Password .
2	In the Old Password field, enter your current password.
3	In the New Password and Re-enter New Password fields, enter your new password.
4	In the Password Hint field, enter a hint when you have forgotten your password.
5	Click Submit .

Section 3: Update Your Profile (Continued)

Step 2: Update your Personal Information

1	On the Profile Options page, click Personal Information .
2	Click Personal Information in the middle of the page.
3	On the Personal Information page, update the appropriate information, and then click Save .

Step 3: Set up Assistants/Travel Arrangers

1	On the Profile Options page, click Assistants/Arrangers .
2	Click Add an Assistant to search for your assistant's last name.
3	From the Assistant dropdown menu, select the appropriate assistant.
4	Select Can book travel for me .
5	Select Is my primary assistant for travel , if necessary.
6	Click Save .

Step 4: Enter Bank Information

1	On the Profile Options page, click Bank Information .
3	On the Bank Information page, in the Routing Number field, enter your bank's routing number.
4	Bank Account Number field, enter the bank account number where you wish to receive your expense reimbursements.
5	Re-Type Bank Account Number field, enter the bank account number again.
6	Account Type field, choose either Checking or Savings in the dropdown box.
7	Active field choose Yes in the dropdown box and click Save .

Step 5: Add an Expense Delegate

1	On the Profile Options page, click Expense Delegates .
2	On the Expense Delegates page, click Add .
3	In the Search by Employee Name, Email Address or Logon Id field, type the last name of the delegate you wish to add.

Section 3: Update Your Profile (Continued)

4	From the list of matches, select the appropriate person.
5	Select the responsibilities you wish this delegate to perform on your behalf.
6	Click Save .

Step 6: Change Expense Preferences

1	On the Profile Options page, click Expense Preferences .
2	In the Send Email When... section, select the appropriate actions.
3	In the Prompt... section, select the appropriate actions.
4	Click Save .

Step 7: Add a Company Car

1	On the Profile Options page, click Company Car .
2	On the Company Car Registration page, click New .
3	In the Vehicle ID field, enter the vehicle's ID number.
4	In the Fuel Type field, from the dropdown box click on Company Car ID .
5	Click Preferred Car and Save .

Section 4: Make a Travel Reservation

Step 1: Make a Flight Reservation

1	On the Flight tab, select one of these: Round Trip One Way Multi-Segment
2	In the Departure City and Arrival City fields, enter the cities for your travel.
3	In the Departure and Return fields, select the appropriate dates and times.
4	If you need a car, select Pick-up/Drop-off Car at Airport .
5	If you need a hotel, select Find a Hotel .
6	In the Search flights by field, select either Price or by Schedule .
7	Click Search .
8	Select the appropriate flights and click Price these options to view pricing.

Step 1: Make a Flight Reservation (Continued)

9	After you find the appropriate flight, click Select .
10	Check the Travel Policy, Rules and Penalties, if in agreement, click Select .
11	Click Save .
12	Click Select Seats to review your seat assignment. Click Close .
13	Click Reserve Flight and Continue .

Step 2: Select a Car

1	If you specified that you need a car on the Flight tab, you will see car results for the car search.
2	Select the appropriate rental car, and then click Reserve Car and Continue .

Step 3: Select a Hotel

*If you selected the **Find a Hotel** option on the **Flight** tab, the hotel results are displayed after you choose your rental car.*

1	To filter by hotel chain, click Hotel Chain , and then select the chains you want to view.
2	Click the More Info link for a specific hotel to find more detailed information for the hotel.
3	In When you are ready to reserve your hotel room, click Choose Room and click Select for the appropriate rate and hotel.
4	Review and Reserve Hotel page will appear. Verify information is correct, and then click Reserve Hotel and Continue .

Step 4: Complete the Booking

1	Enter your trip information in the Trip Name and Trip Description fields.
2	Click Next to finalize your reservation.
3	To complete, click Purchase Tickets .

Section 5: Cancel or Change an Airline, Car Rental, or Hotel Reservation

*If the flights are already ticketed, you should call **Adelman** to make changes.*

1	On the Home page, click My Trips .
2	In the Trip Library page, click the name of the trip.
3	From the Trip Overview page, you can: <ul style="list-style-type: none"> • Print Itinerary • Email Itinerary • Open in Outlook • View E-Receipts • View Trip History • Create Template • Clone Trip • Share Trip • Cancel Entire Trip
4	You can cancel your trip from the Trip Library page. Under Action column, click on Cancel Trip .

Section 7: Review the Report Information

1	On the Expense Report page, in the Expense List , click any transaction to view the details.
2	To review information on the Report Header , click the Details dropdown menu, select Report Header .
3	Make the appropriate changes, and click Save .

Section 8: Use Special Features

Import Company Card Transaction to Your Expense Report

Company card transactions (charges) are automatically transferred (imported) to Concur Travel & Expense daily.

1	On the Expense Report page, click Import Tab .
2	In the Available Expenses section, select each transaction that you want to match and click Match button to assign to the current expense report. <i><u>You may have a travel Itinerary and/or an E-receipt to Match before importing the AMEX charge.</u></i>
3	Click the box next to the expense(s) to add and click Import button.

Use Special Features (Continued)

Itemize Nightly Lodging Expenses

Step 1: Itemize nightly lodging expenses

1	On the New Expense tab, select the Hotel expense type.
2	Click the Transaction Date field, and then use the calendar to select the date of the transaction.
3	Fill out all Business Purpose and Vendor fields.
4	In the Amount field, enter the amount spent on the expense.
5	Click Itemize .
6	On the Nightly Lodging Expenses tab in the Number of Nights field, enter the number of nights for your hotel stay (the Check-in Date will be filled in once you enter the number of nights).
7	In the Room Rate field, enter the amount you were charged per night for the room.
8	In the Room Tax fields, enter the amount of each room tax that you were charged.
9	In the Additional Charges (each night) section, from the first Expense Type dropdown menu, select the appropriate expense type.
10	In the Amount field, enter the amount of the expense.
11	Repeat steps 9-10 using the second Expense Type field if you have more than one recurring additional charge.
12	Click Save Itemizations .

Step 2: Add remaining lodging itemizations

1	If the amount remaining is more than zero, on the New Itemization tab, click the Expense Type dropdown arrow, and then select the appropriate expense from the dropdown list.
2	Complete all required and optional fields as directed by your company.
3	Click Save .
4	Repeat steps 1-3 until the Remaining Amount equals \$0.00.

Use Special Features (Continued)

Itemize Expenses

1	On the Expense Report page, click the expense type you want to itemize.
2	Click Itemize .
3	On the New Itemization tab, click the Expense Type dropdown arrow and select the appropriate expense from the dropdown list.
4	Complete all required and optional fields as directed by your company.
5	Click Save .
6	Repeat steps 3-5 until the Remaining Amount equals \$0.00.

Add Attendees

1	On the New Expense tab, select Entertainment-Other or Business Meals with Attendees expense type.
2	Fill out all other required fields for this expense type as defined by your company.
3	In the Amount field, enter the amount of the expense.
4	Click Advance Search . Search for employee by typing the last name and click Search .
5	On the Search Results window, select the attendees for this expense, and click Add to Expense .
6	To add a new attendee, click New Attendee . Complete the required fields, and then click Save .
7	Click Save .

Calculate Company Car Mileage

1	On the New Expense tab, select Company Car Mileage expense type.
2	In the Transaction Date field, type the date or use the calendar.
3	In the Vehicle ID and Odometer (Start) field, will default. Enter the (End) mileage in the second field.
4	In the Distance (Business) field will automatically calculate and default. Enter any (Personal) mileage in second field.
5	Click Save .

Section 9: Add and Delete Receipts

Fax your receipts

1	From the Print dropdown menu, select LVB Fax Receipt Cover Page .
2	Click Print .
3	Fax the cover page and the receipts to the number on the cover page.
4	To view the attached receipts, from the Receipts dropdown menu, select View Receipts .

Attach scanned images of your receipts

1	On the Expense Report page, from the Receipts dropdown menu, select Attach Receipt Images .
2	Click Browse and locate the file you want to attach.
4	Click the file, and then click Open .
5	To attach another image, click Browse , and then repeat the process.
6	Click Upload , and then click Close .
8	To view the attached receipts, from the Receipts dropdown menu, select View Receipts .

Delete receipt images added by Fax or Receipts dropdown menu

1	On the Expense Report page, from the Receipts dropdown menu, select Delete Receipt Images .
2	In the confirmation window, click Yes . <i>All attached images are deleted. You cannot delete individual receipt images.</i>

Delete receipt images using the Available Receipts window (E-Receipts or Mobile)

1	On the Expense Report page, locate the expense and hover over the Receipt Icon .
2	The receipt will come up in a separate window, click Detach From Entry .

Section 10: Submit or Resubmit Expense Reports

Submit your completed expense report

1	On the Expense Report page, click Submit Report (orange button).
2	Click Submit Report (orange button).
3	Click Submit Report (blue button).

Section 10: Submit or Resubmit Expense Reports (Continued)

Correct and resubmit a report sent back by your approver

1	In My Tasks or Open Reports , click the report name (link) to open the report.
3	Make the requested changes.
4	Click Save .
5	Click Submit Report .

Section 11: Print Expense Reports

Preview, print, and submit your report

1	From the Print menu, select LVB Detailed Report .
2	After reviewing the document, click Print .
5	Click Close .

Section 12: Review & Approve Expense Reports

Review and approve an expense report

1	Click Required Approvals on the Home page.
2	Click on the expense report to review and approve.
3	To review the report information, from the Details dropdown menu, select Report Header (under Report).
4	To review expense entry information, click an expense entry.
5	Click Approve .

Send an expense report back to the employee

	Click Required Approvals on the Home page.
1	Click on the expense report to review and approve.
2	Click Send Back to Employee .
3	Enter a comment for the employee, and then click OK .



Liggett Vector Brands

QuickStart Guide
Concur Travel & Expense

Concur™

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Welcome to Concur Travel & Expense

Concur Travel & Expense integrates expense reporting with a complete travel booking solution. This comprehensive Web-based service provides all of the tools users need to book travel as well as create and submit expense reports. Managers use the service to review and approve expense reports. Back-office employees use the service to produce audit reports, ensure compliance, and deliver business intelligence to help your company reduce its costs.

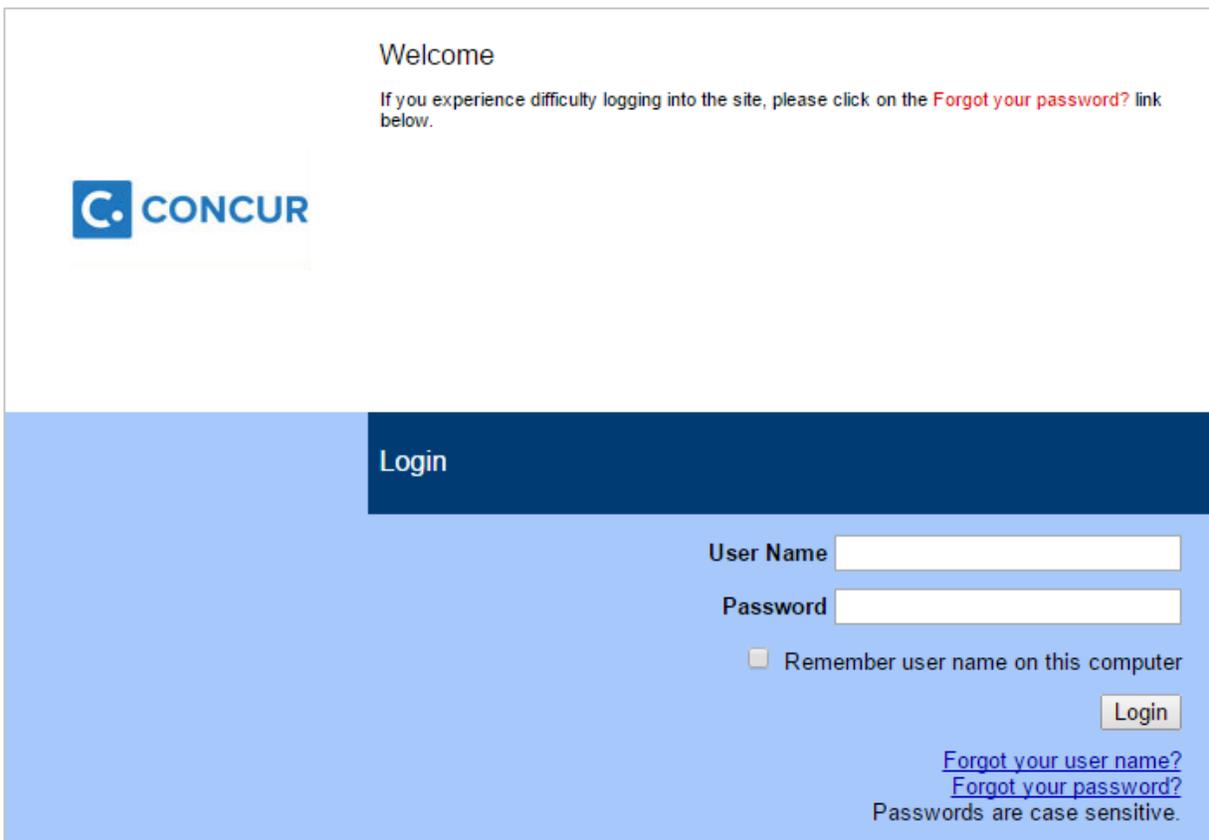
Section 1: Log on to Concur Travel & Expense

To Log on to Concur:

1. In the **User Name** field, enter your user name (e.g. jdoe@lvbrands).
2. In the **Password** field, enter your password.
3. Click **Login**.

NOTE:

- Log on to Concur following your company's logon instructions.
- Your password is case sensitive.
- If you are not sure how to log on, check with your company's administrator



Welcome

If you experience difficulty logging into the site, please click on the [Forgot your password?](#) link below.



Login

User Name

Password

Remember user name on this computer

[Forgot your user name?](#)
[Forgot your password?](#)
Passwords are case sensitive.

Section 2: Explore the Home Page

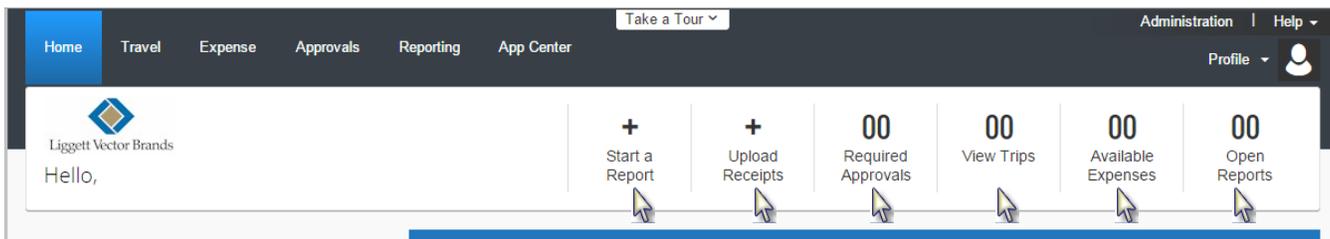
The **Home** page includes several sections that make it easy for you to navigate and find the information you need.

NOTE: To return to the **Home** page from any other page, click the **Concur** logo on the left end of the menu.

The screenshot shows the Concur Home Page. At the top is a navigation bar with 'Home' (selected), 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. On the right of the navigation bar are 'Administration | Help', 'Profile', and a user icon. Below the navigation bar is a header section with the Liggett Vector Brands logo, 'Hello,' and five summary cards: 'Start a Report', 'Upload Receipts', 'Required Approvals (00)', 'Available Expenses (00)', and 'Open Reports (00)'. The main content area is divided into three columns. The left column is the 'TRIP SEARCH' section, which includes a search filter bar with icons for flight, car, hotel, and other services. Below this is a 'UNUSED TICKETS' section with explanatory text. The search form includes options for 'Round Trip', 'One Way', or 'Multi-Segment', and fields for 'Departure City', 'Arrival City', 'Departure' (date, time, and duration), and 'Return' (date, time, and duration). There are also checkboxes for 'Pick-up/Drop-off car at airport', 'Automatically reserve this car', and 'Find a Hotel', and a 'Specify airline' section with a 'Class of Service' dropdown set to 'Economy class'. At the bottom of the search form are radio buttons for 'Search flights by Price' and 'Schedule'. The middle column features a blue 'Welcome back, Administrator.' banner with a quote from a customer: '81 DAYS remain until the Enhanced UI.' and a 'Preview Settings' button. Below this is the 'COMPANY NOTES' section, which includes a 'Quick Start Guide' and 'Concur Travel & Expense' with a 'Read more' button. The right column is the 'MY TASKS' section, which displays three summary cards: 'Required Approvals (00)', 'Available Expenses (00)', and 'Open Reports (00)'. Each card includes a status message: 'Great! You currently have no approvals.', 'You currently have no available expenses.', and 'You currently have no active reports.' respectively. At the bottom left is the 'MY TRIPS (0)' section, which shows 'You currently have no upcoming trips.'

Section 2: Explore the Home Page (Continued)

Section:	Description:
Start a Report	This section provides a quick start to create a new expense report, or view your existing reports. It also lists your un-submitted expense reports.
Upload Receipts	This section is used to upload new receipts to the Receipt Store for future expense reports.
Required Approvals	This section displays the number of expense reports you have awaiting your review and approval. <i>This section appears on Home page only if you are an Expense approver.</i>
View Trips	This section displays the number of outstanding and upcoming trips.
Available Expenses	This section displays the number of available credit card charges.
Open Reports	This section displays the number of open expense reports.



Section 2: Explore the Home Page (Continued)

Sections:	Description
Company Notes	This section displays information and links provided by your company.
My Tasks	This section displays expense requiring your approval, available expenses and active expense reports.
My Trips	This section lists your outstanding and upcoming trips.
Trip Search:	This section provides the tools you need to book a trip with any or all of these:
<ul style="list-style-type: none">  • Flight  • Car  • Hotel  • Taxi  • Rail  • Check Flight Status 	<p>Flight: Use to book a flight. You can also book hotel and reserve a car at the same time.</p> <p>Car, Hotel, Taxi, or Rail: Use to book hotels, reserve rental cars, etc. if not including them while booking a flight (Flight tab).</p> <p>Check Flight Status: Use to check the status of a flight. Enter the cities, date, and airline to see arrival times for the flight.</p>

TRIP SEARCH

UNUSED TICKETS

To view unused tickets, please click on the Unused Ticket link during the reservation process. Review your unused tickets and then select your flights based on lowest fare and flight times, keeping in mind that you have an unused ticket which might apply. At times Unused Tickets may not apply to your trip based on fare rules applicable to the original and new ticket and are subject to review by your travel consultants. Unused tickets are only applied to reservations during normal business hours, Monday – Friday.

Round Trip
 One Way
 Multi-Segment

Departure City ?

Find an airport | Select multiple airports

Arrival City ?

Find an airport | Select multiple airports

Departure ?

depart ▼ 09:00 am ▼ ± 4 ▼

Return ?

depart ▼ 05:00 pm ▼ ± 4 ▼

Pick-up/Drop-off car at airport
 Automatically reserve this car
 Find a Hotel

Specify airline ?
 Class of Service: Economy class ▼ ?

Search flights by Price Schedule

Welcome back, Administrator.

81

DAYS
remain until
the Enhanced UI.

"I like the consistency of the interface. I like how responsive and easy it is to find things."
—Concur customer

Preview Settings

COMPANY NOTES

Quick Start Guide
Quick Start Guide

Concur Travel & Expense

Read more

MY TASKS

00

Required Approvals →

Great! You currently have no approvals.

00

Available Expenses →

You currently have no available expenses.

00

Open Reports →

You currently have no active reports.

MY TRIPS (0)

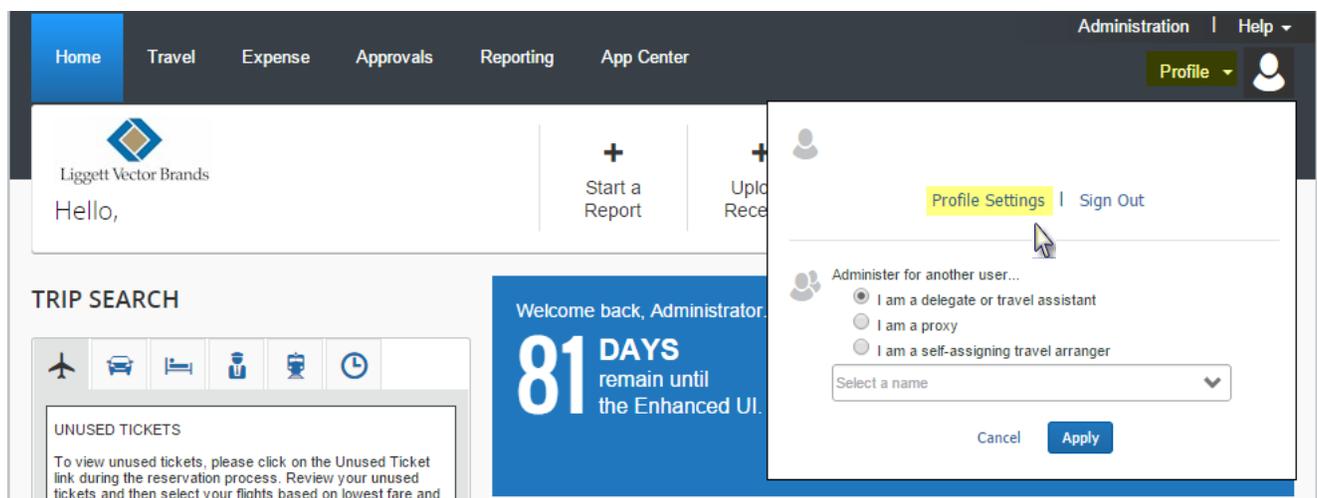
You currently have no upcoming trips.

Section 3: Profile

Before you use Concur T&E for the first time, update your profile. You must save your profile before you make your first attempt to book a trip in Concur Travel and an expense report in Concur Expense.

Step 1: Update Your Personal Information

How to...	Additional Information
1. Click Profile at the right top of the page.	Use the profile options to set or change your personal preferences. They include: <ul style="list-style-type: none">• Personal Information• Frequent-Traveler Programs• Assistants/Arrangers• Bank information (Banking information must be entered 5-7 days prior to your first expense report.)• Company Car• E-Receipts• Expense delegates• Expense preferences• Mobile Registration (Mobile Device)
2. On the Profile dropdown box, click Profile Settings .	
3. On the Profile Options page, click Personal Information	Complete these sections of your travel profile: <ul style="list-style-type: none">• Name & Airport Security• Home Address• Work Address• Contact Information• Emergency Contact• Travel Preferences• Credit Cards <p>You must complete all fields marked Required (in red) to save your profile. Verify that the first and last name fields match the ID used at the airport.</p> <p>There are several Save buttons on the profile page. You only need to save once as every Save button saves the entire profile.</p>



Step 1: Update Your Personal Information (continued)

CONCUR | Administration | Help

Travel Expense Approvals Reporting App Center

Profile | Personal Information | Change Password | System Settings | Mobile Registration | Travel Vacation Reassignment

Your Information

- Personal Information
- Company Information**
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Expense Settings

- Expense Information
- Bank Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Company Car
- Favorite Attendees

Other Settings

- E-Receipt Activation
- System Settings
- Connected Apps
- Concur Connect
- Change Password
- Forgot Mobile Password (PIN)
- Privacy Statement
- Travel Vacation Reassignment
- Mobile Registration
- I'm Assisting...

Profile Options

Select one of the following to customize your user profile.

Personal Information Your home address and emergency contact information.	System Settings Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?
Company Information Your company name and business address or your remote location address.	Contact Information How can we contact you about your travel arrangements?
Credit Card Information You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.	Setup Travel Assistants You can allow other people within your companies to book trips and enter expenses for you.
E-Receipt Activation Enable e-receipts to automatically receive electronic receipts from participating vendors.	Travel Preferences Carrier, Hotel, Rental Car and other travel-related preferences.
Travel Vacation Reassignment Going to be out of the office? Configure your backup travel manager.	Bank Information Bank Information
Expense Delegates Delegates are employees who are allowed to perform work on behalf of other employees.	Expense Preferences Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
Company Car Company Car	Change Password Change your password.
Mobile Registration Set up access to Concur on your mobile device	

Section 3: Profile (Continued)

Step 2: Set Up Assistants & Travel Arrangers

How to...

1. Click **Profile** at the right top of the page.
2. On the **Profile** dropdown box, click **Profile Settings**.
3. On the **Profile Options** page, click **Assistants/Arrangers**.
4. Click **Add an Assistant** to search for your assistant's last name.
5. In the **Add an Assistant** box, enter the assistant's last name.
6. Click the **Assistant** from the dropdown box.
7. Select **Can book travel for me**.
8. Select **Is my primary assistant for travel**.
9. Click **Save**.

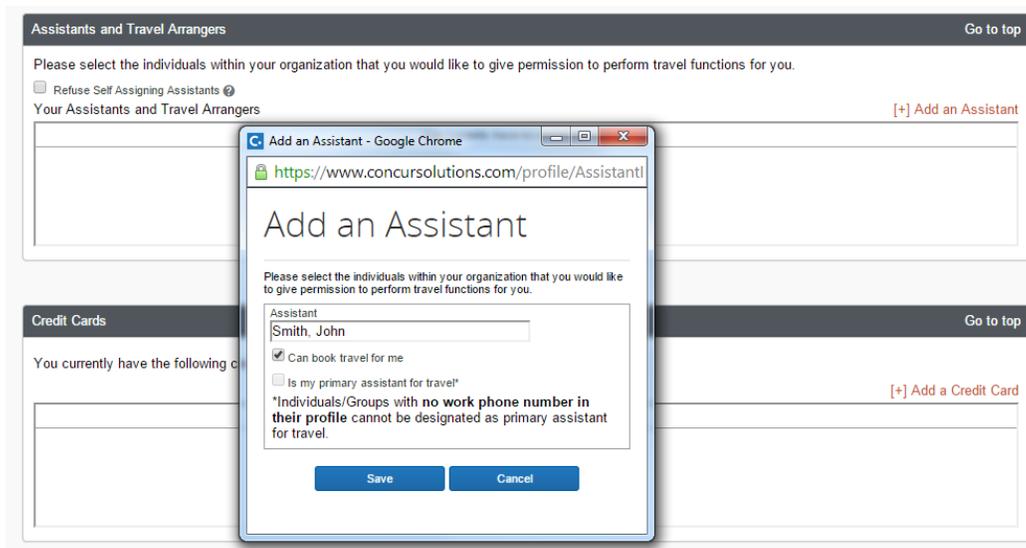
Additional Information

Use **Assistants and Travel Arrangers** to give other Concur Travel users the ability to view and modify your travel profile or book trips for you.

Important: Your assistant must have an existing Concur Travel account before you can add him or her to your profile.

The **Assistant** dropdown list shows any individuals that match your search criteria.

Use this option if you want to allow the assistant to view, make changes to, and modify your profile.



Section 3: Profile (Continued)

Step 3: Bank Information

How to...	Additional Information
-----------	------------------------

1. Click **Profile** at the right top of the page.
2. On the **Profile** dropdown box, click **Profile Settings**.
3. On the **Profile Options** page, click **Bank Information**
4. Fill in your Bank's **Routing Number**.
5. Fill in your **Bank Account Number** and **Re-Type Bank Account Number**
6. **Account Type** chose in the dropdown box **Checking or Savings**.
7. **Active** choose in the dropdown box **Yes**.
8. Click **Save**.

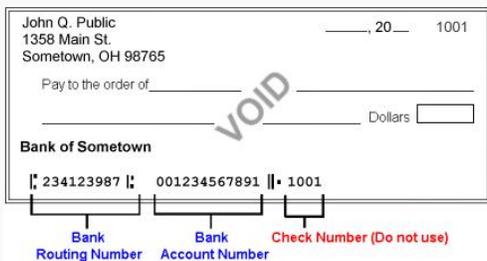
Bank Information must be entered, submitted and approved by your bank before your first expense report can be submitted. Normally takes 5-7 business days to complete.

Bank Information

Routing Number xxxxx2149	Bank Account Number xxxxxx0077	Re-Type Bank Account Number
Bank Name	Branch Location	Account Type Checking
Status Confirmed	Active Yes	

[Save](#)

By entering your bank account information you are authorizing direct deposit using electronic funds transfer into this account for amounts due to you. If you do not want to authorize direct deposit then you should not enter your bank account information.



Routing Number is usually located between the **@** symbols on your check and is 9 digits.

Account Number is usually located before the **||** symbol on your check and is 3-17 digits.

Account History

Routing Number	Bank Account Nu...	Account Type	Activity	Description	Last Changed*	Changed By
xxxxx2149	xxxxxx0077	Checking	Confirmed	The account is eligible to receive payments.	11/18/2010 07:53 PM	System, Concur
xxxxx2149	xxxxxx0077	Checking	Changed	The bank account information was either created or changed.	11/18/2010 09:46 AM	

Section 3: Profile (Continued)

Step 4: Add Expense Delegate

How to...	Additional Information
1. Click Profile at the right top of the page.	
2. On the Profile dropdown box, click Profile Settings .	
3. On the Profile Options page, click Expense Delegate .	The Expense Delegates page appears. From this page, you will give other Concur Expense users the ability to prepare, submit, approve, view receipts, approve reports, or receive emails on your behalf.
4. Click Add and type the last name of the delegate in the Search by employee name, email address or logon id field,	As you begin to type the name, Concur Expense provides a list of users to select from.
5. Click on the name of the delegate from the dropdown list and click Add .	
6. Select the appropriate task checkboxes.	The delegate can only perform the tasks you select. A delegate will need to be an approver in order to approve reports on your behalf.
7. To add additional delegates, repeat steps 4-7.	
8. Click Save .	

Expense Delegates

[Delegates](#) [Delegate For](#)

[Add](#) [Save](#) [Delete](#)

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or logon id

Smith, John [Add](#) [Cancel](#)

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
	No records found.							
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 3: Profile (Continued)

Step 5: Expense Preferences

How to...	Additional Information
1. Click Profile at the right top of the page.	
2. On the Profile dropdown box, click Profile Settings .	
3. On the Profile Options page, in the Expense Settings section, click Expense Preferences .	The Expense Preferences page appears. From this page, you can specify when you will receive email notifications and prompts.
4. In the Send email when section, select the applicable checkboxes.	In this section, you determine when you will receive email notifications. If you <u>do not</u> want to receive emails every time an AMEX credit card charge hits your account, uncheck "New company card transactions arrive".
5. In the Prompt section, select the applicable checkboxes.	In this section, you determine when Expense will prompt you for further action.
6. Click Save .	

Expense Preferences

Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Send email when...

- The status of an expense report changes
- New company card transactions arrive
- Faxed receipts are successfully received
- An expense report is submitted for approval
- A card feed import completes

Prompt...

- For an approver when an expense report is submitted

Section 3: Profile (Continued)

Step 6: Add Company Car

How to...

Additional Information

1. Click **Profile** at the right top of the page.
2. On the **Profile** dropdown box, click **Profile Settings**
3. On the **Profile Options** page, in the **Expense Settings** section, click **Company Car**.
4. On the **Company Car Registration** page, click **New**.
5. In the **Vehicle ID** field, enter the vehicle's ID number.
6. In the **Fuel Type** field, from the dropdown box click on **Company Car ID**.
7. Click **Preferred Car** and **Save**.

Company Car Registration

This page displays all the company cars that have been registered. Click **New** to register another car.
Reimbursement Method: Company Car - Variable Rates

Vehicle ID

Fuel Type

Preferred Car

Section 3: Profile (Continued)

Step 7: Enable E-Receipts

Use E-Receipts

E-receipts are an electronic version of receipt data that can be sent directly to Concur to replace imaged paper receipts. You must opt in from your Profile before e-receipts will show in Concur Expense.

How to...	Additional Information
<p>1. On the Home page, in the Alerts section, click Sign up here.</p> 	<p>The E-Receipt Activation page appears.</p>
<p>2. Click E-Receipt Activation.</p>	<p>The E-Receipt Activation and Use Agreement will appear.</p>
<p>3. Click I Accept.</p>	<p>The e-receipts confirmation appears.</p> <p>Once you have confirmed the e-receipt activation, all of your corporate cards are included. From your Profile, you can choose to exclude a particular card.</p> <p>As you create your expense reports, you will see the e-receipt icon next to any transactions that have an e-receipt. You can click the icon to view the e-receipt.</p> 

Section 3: Profile (Continued)

Step 8: Change your Time Zone, Date Format, or Travel Emails

How to...

1. Click **Profile** at the right top of the page.
2. On the **Profile** dropdown box, click **Profile Settings**
3. On the **Profile Options** page, click **System Settings**.
4. On the **System Settings** page, update the appropriate information, and then click **Save**.

Additional Information

You can change the system and regional settings (number, date, and time format).

System Settings

Regional Settings and Language

Default Language
English (United States) ▼

Number Format
1,000.00 ▼

Placement of Currency Symbol
Before the amount ▼

Negative Number Format
-100 ▼

Negative Currency Format
-100 ▼

mile/km
mile ▼

Date Format
mm/dd/yyyy ▼

Time Format
h:mm AM/PM ▼

Hour/Minute Separator
: ▼ 11/24/2014 11:11 am

Time zone (local time)
(UTC-05:00) Eastern Time (US & Canada) ▼

Calendar Settings

Start week on
Sunday ▼

Start Day View At
08:00 am ▼

End Day View At
08:00 pm ▼

Default View
month ▼

Other Preferences

Home Page
▼

Rows per page
25 ▼

Other Settings

Run in Concur Accessibility Mode ?

Email Notifications

- Send an email every time something is put in or removed from my approval queue
- Send a daily summary of items in my queue
- Let me know when one of my requests is approved or denied
- Send Confirmation Emails ?
- Send Trip-on-Hold Reminder Emails ?
- Send Ticketed Travel Reminder Email ?
- Send Cancellation Emails ?

Section 3: Profile (Continued)

Step 9: Change Your Password

How to...	Additional Information
1. Click Profile at the right top of the page.	
2. On the Profile dropdown box, click Profile Settings	
3. On the Profile Options page, click Change Password .	
4. In the Old Password field, enter your current password.	To change your password, you need to know your current password.
5. In the New Password field, enter your new password.	
6. Verify your new password by re-entering it in the Re-enter Password field.	
7. Enter a word or phrase in the Password Hint field to act as a reminder if you forget your password, and then click Submit .	

Change Password

A password must be at least 7 characters. It can contain numbers (0-9), upper and lower case characters (A-Z, a-z), and symbols (such as ^%*@#). It cannot contain spaces. All fields are required.

Note: Passwords are case sensitive.

This will change your password for all Concur products.

Old Password	New Password	Re-enter New Password
<input type="text"/>	<input type="text"/>	<input type="text"/>

Password Hint (we will email this to you if you forget your password)

SubmitCancel

Section 4: Make a Travel Reservation

Step 1: Make a Flight Reservation

How to...	Additional Information
1. On the Home page, click the Flight tab at the left side of the page under the Trip Search section.	If you have a car, hotel, taxi, or rail to book without airfare, use the corresponding tabs.
2. Select one of the following types of flight options:	<ul style="list-style-type: none">• Round Trip• One Way• Multi-Segment
3. In the Departure City and Arrival City fields, enter the cities for your travel.	When you type in a city, airport name, or airport code, Concur Travel will automatically search for a match.
4. Click in the Departure and Return date fields, and then select the appropriate dates from the calendar.	You can also select the appropriate Departure and Return times and date range. Concur Travel searches before and after the time you select.
5. If you need a car, select the Pick-up/Drop-off car at Airport checkbox.	<p>Depending on your company's configuration, you can automatically reserve a car, allowing you to bypass viewing the car results. After you select a vendor and car type, a car is automatically added to your reservation.</p> <p>If you need an off-airport car or have other special requests, you can skip this step and add a car from the Itinerary page.</p>
6. If you need a hotel, select the Find a Hotel checkbox.	<p>You can choose to search for the hotel by:</p> <ul style="list-style-type: none">• Airport• Address• Company Location• Reference Point / Zip Code (a city or neighborhood) <p>If you are staying at more than one hotel during your trip or do not need a hotel for the entire length of your stay, you can skip this step and add a hotel from the Itinerary page.</p>
7. In the Search flights by section, select either Price or Schedule .	<p>Select Price to find fares in Coach/Economy.</p> <p>Select Schedule to locate flights by departure times.</p>
8. Click Search .	To filter the results, select a column, row, or cell in the grid directly above the list of flights. The results will then show flights with the number of stops, airline, or both.

Step 1: Make a Flight Reservation (Continued)

TRIP SEARCH



UNUSED TICKETS

To view unused tickets, please click on the Unused Ticket link during the reservation process. Review your unused tickets and then select your flights based on lowest fare and flight times, keeping in mind that you have an unused ticket which might apply. At times Unused Tickets may not apply to your trip based on fare rules applicable to the original and new ticket and are subject to review by your travel consultants. Unused tickets are only applied to reservations during normal business hours, Monday – Friday.

Flight Search

Round Trip One Way Multi-Segment

Departure City [?](#)

RDU - Raleigh Durham Intl Arpt - Raleigh/Durham, NC

[Find an airport](#) | [Select multiple airports](#)

Arrival City [?](#)

Atlanta, GA - Hartsfield Intl Arpt

[Find an airport](#) | [Select multiple airports](#)

Departure [?](#)

01/19/2015

depart ▼

09:00 am ▼

± 4 ▼



Find hotels within Distance Units of

Airport Address
 Company Location Reference Point / Zip Code

Reference Point / Zip Code
(e.g. 'Statue of Liberty', '90210' or 'Alexandria, VA')

Atlanta, GA

With names containing:

Specify airline [?](#)

Class of Service: [?](#)

Search flights by Price Schedule

Search

Or, tell us in your words what you want to do

e.g. flight from JFK to Paris on Tuesday

Search

Step 1: Make a Flight Reservation (Continued)

How to... Additional Information

- Click on **Starting From: \$** to choose the flights for both Outbound and Return.
- Click **Price these Options** This will give you the cost of the flight for Round Trip.

Trip Summary

Select Flights

Round Trip
RDU - ATL
Outbound: Mon, 01/19/2015
Return: Wed, 01/21/2015

Select a Car Remove

Days: 2
ATL - Terminal
Pick-up: Mon, 01/19/2015
Drop-off: Wed, 01/21/2015

Select a Hotel Remove

Nights: 2
Atlanta, GA
Check-in: Mon, 01/19/2015
Check-out: Wed, 01/21/2015

Finalize Trip

[Print / Email](#)
[Hide matrix](#)

Raleigh, NC To Atlanta, GA

Mon, Jan 19 - Wed, Jan 21

All 6 results	Delta	Southwest
Nonstop 5 results	4 results	1 results
1 stop 1 results	--	1 results

Baggage Fee Policies Show fare display legend

Shop by Fares | Shop by Schedule | Sorted By: Depart - Earliest

Outbound | Return

Raleigh, NC - Mon, Jan 19

Displaying: 6 out of 22 results.

	Carrier	Depart	Arrive	Stops	Class	SeatMap
Starting From: \$414.20	Delta #1456	RDU 06:00 am →	ATL 07:33 am	0	Economy	
1h 33m; McDonnell Douglas MD-90; (Sabre)						
Starting From: \$188.20	Southwest #4299	RDU 06:35 am →	ATL 08:05 am	0	Economy	
1h 30m; (Southwest)						
Starting From: \$414.20	Delta #1482	RDU 07:10 am →	ATL 08:57 am	0	Economy	
1h 47m; Boeing 757-200; (Sabre)						
Starting From: \$196.70	Southwest #3587 Southwest #1971	RDU 08:25 am → BWI 09:35 am BWI 11:05 am → ATL 01:15 pm	0	0	Economy	
4h 50m; (Southwest)						
Starting From: \$414.20	Delta #1137	RDU 08:30 am →	ATL 10:13 am	0	Economy	
1h 43m; Boeing 757-200; (Sabre)						
Starting From: \$414.20	Delta #2315	RDU 09:44 am →	ATL 11:15 am	0	Economy	
1h 31m; Boeing 757-200; (Sabre)						

Displaying: 6 out of 22 results.

19

Step 1: Make a Flight Reservation (Continued)

How to... **Additional Information**

- 11. Click **Price these options** button to get a final price for the flight(s).

Raleigh, NC To Atlanta, GA
 Mon, Jan 19 - Wed, Jan 21

[Print / Email](#)

[Hide matrix](#)

All 29 results	American Airlines	Multiple Carriers	Delta	US Airways	United	Southwest
Nonstop 7 results	--	--	6 results	--	--	1 results
1 stop 22 results	7 results	4 results	3 results	4 results	2 results	2 results

Baggage Fee Policies

[Show fare display legend](#)

Shop by Fares | Shop by Schedule

Sorted By: **Depart - Earliest** ▼

Chosen Carriers

Outbound

<p>Starting From: \$414.20</p>	Delta #1456 <i>RDU</i> 06:00 am → <i>ATL</i> 07:33 am 0 Economy
	<p>1 hour 33 minutes; McDonnell Douglas MD-90; (Sabre) Remove</p>

Return

<p>Starting From: \$414.20</p>	Delta #1077 <i>ATL</i> 01:50 pm → <i>RDU</i> 03:12 pm 0 Economy
	<p>1 hour 22 minutes; McDonnell Douglas MD-90; (Sabre) Remove</p>

Price these options



Step 1: Make a Flight Reservation (Continued)

How to...	Additional Information
-----------	------------------------

12. Click **Select** button to start the reservation process.

Policy information appears next to the **Select** button. The **Select** buttons are color coded as:

- A *green* **Reserve** button indicates the fare is within policy.
- A *yellow* **Reserve** indicates the fare is outside of policy. If you select this fare, you must enter additional information.

When you click **Reserve** to select a fare, Concur Travel & Expense automatically selects the corresponding frequent flier program, if available. You can also select a different program from the list at the bottom of the screen.

Raleigh, NC To Atlanta, GA
 Mon, Jan 19 - Wed, Jan 21

[Print / Email](#)

[Hide matrix](#)

All 54 results	Southwest	US Airways	Multiple Carriers	United	American Airlines	Delta
Nonstop 17 results	188.20 1 results	--	--	--	--	414.20 16 results
1 stop 37 results	196.70 5 results	199.20 9 results	217.70 5 results	249.20 2 results	266.70 16 results	--

[Baggage Fee Policies](#)

[Show fare display legend](#)

Compare List							
Price	Carrier	Depart	Arrive	Stops	Duration		
\$414.20	Delta	RDU	06:00 am → ATL	07:33 am	0	1h 33m	
Select		ATL	01:50 pm → RDU	03:12 pm	0	1h 22m	
Remove						More like this	Show details

Step 1: Make a Flight Reservation (Continued)

How to...	Additional Information
-----------	------------------------

13. Click **Select** button Verify Travel Policy and Fare Rules, if all are acceptable, click **Select**.

Raleigh, NC To Atlanta, GA Print / Email
 Mon, Jan 19 - Wed, Jan 21 Hide matrix

All 54 results	Southwest	US Airways	Multiple Carriers	United	American Airlines	Delta
Nonstop 17 results	188.20 1 results	--	--	--	--	414.20 16 results
1 stop 37 results	196.70 5 results	199.20 9 results	217.70 5 results	249.20 2 results	266.70 16 results	--

Baggage Fee Policies Show fare display legend

Compare List

Price	Carrier	Depart	Arrive	Stops	Duration
Outbound flight: Raleigh, NC (RDU) - Atlanta, GA (ATL) Mon, Jan 19					
Delta #1456	Raleigh Durham Intl Ar... (RDU) Depart: Monday, 06:00 am	Hartsfield Intl Arpt (ATL) Arrive: Monday, 07:33 am			
Stops: 0 Duration: 1h 33m Economy: H McDonnell Douglas MD-90					
Return flight: Atlanta, GA (ATL) - Raleigh, NC (RDU) Wed, Jan 21					
Delta #1077	Hartsfield Intl Arpt (ATL) Depart: Wednesday, 01:50 pm	Raleigh Durham Intl Ar... (RDU) Arrive: Wednesday, 03:12 pm			
Stops: 0 Duration: 1h 22m Economy: L McDonnell Douglas MD-90					

Travel Policy
 Air Fare is greater than the least cost logical airfare plus 200.00 dollars
Delta - (Sabre)
[Fare Rules](#)
Ticket non-refundable - penalties may apply
 Change fee likely applies (plus fare difference, see fare rules)
 E-Ticketing Available

Your company credit card will be used to purchase this trip.

Select
Hide details

Step 1: Make a Flight Reservation (Continued)

How to...	Additional Information
-----------	------------------------

- | | |
|---|---|
| 14. Click Please Choose a Reason dropdown box. | Review and select an appropriate choice and click Save . |
|---|---|

Travel Policy Violation [X]

This flight is not in compliance with the following travel rule(s):

- ⚠ Air Fare is greater than the least cost logical airfare plus 200.00 dollars

Please choose the reason for selecting this travel option. If more than one reason applies, choose the most applicable. This reason applies to this entire trip.

-- Please Choose a Reason -- [v]

Please explain why you have chosen this flight. NOTE: We will log flights which you did not take.

[Save] [Cancel]

The selected fare was: \$414.20
The least cost logical fare was: \$188.20

Chosen:

Cost: \$414.20						
Outbound Flight						
	1456	Raleigh Durham Intl Arpt (RDU)	01/19/2015 6:00 AM	Hartsfield Intl Arpt (ATL)	01/19/2015 7:33 AM	Douglas MD-90
Return Flight:						
	1077	Hartsfield Intl Arpt (ATL)	01/21/2015 1:50 PM	Raleigh Durham Intl Arpt (RDU)	01/21/2015 3:12 PM	Douglas MD-90

Least cost logical fare

Step 1: Make a Flight Reservation (Continued)

How to... Additional Information

- 15. Click **Select Seats** to review or change your seat.

Review and Reserve Flight

REVIEW FLIGHTS

Outbound flight: Raleigh, NC (RDU) - Atlanta, GA (ATL) Mon, Jan 19		
Delta #1456	Raleigh Durham Intl Ar... (RDU) Depart: Monday, 06:00 am	Hartsfield Intl Arpt (ATL) Arrive: Monday, 07:33 am
Stops: 0 Duration: 1h 33m Economy: H McDonnell Douglas MD-90		
Return flight: Atlanta, GA (ATL) - Raleigh, NC (RDU) Wed, Jan 21		
Delta #1077	Hartsfield Intl Arpt (ATL) Depart: Wednesday, 01:50 pm	Raleigh Durham Intl Ar... (RDU) Arrive: Wednesday, 03:12 pm
Stops: 0 Duration: 1h 22m Economy: L McDonnell Douglas MD-90		

ENTER TRAVELER INFORMATION

Ensure all traveler information below is correct.

PRIMARY TRAVELER [Edit](#) | [Review all](#)

Name: Kimberly Michelle Howe Phone: (919) 990-3515

Frequent Flyer Programs [Add a Program](#)

For Delta

SEAT ASSIGNMENT

Make your trip more enjoyable by selecting your seats now. Otherwise, Concur will request them for you.

[Select Seats](#)

REVIEW PRICE SUMMARY

Description	Fare	Taxes and Fees	Charges
Airfare	\$359.07	\$55.13	\$414.20
Total Estimated Cost: \$414.20 USD			
Total Due Now: \$414.20 USD			

METHOD OF PAYMENT

This purchase will be charged to your company directly.

ACCEPT FARE RULES AND RESTRICTIONS

This is a Non-Refundable Ticket

Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carrier's system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only.

Please review the rules and restrictions listed below.
When you purchase your ticket, you agree to these rules and restrictions.

Please note that the most restrictive set of rules below applies to your entire itinerary.

Click Fare to view Rules [Raleigh - Atlanta] [Atlanta - Raleigh]

DELTA Raleigh - Atlanta

By completing this booking, you agree to the fare rules and restrictions and hazardous goods policy.

[Back](#) [Reserve Flight and Continue](#)

Step 1: Make a Flight Reservation (Continued)

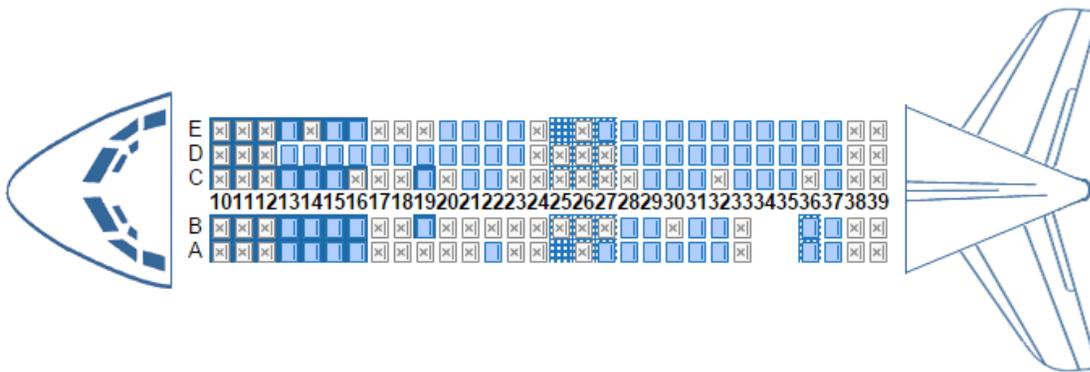
How to...	Additional Information
16. To change your seat, click the seat you prefer.	Point to a seat to view the seat number.
17. Once you have made your seat selection, click Close .	After you select your seat for a flight, you can either click Change Seat or select the next flight in your reservation. Concur Travel will prompt you to save your new seat selection.
18. Review the search results, and then click the Seat Map icon  next to the flight to view the available seats.	A code for seats appears at the bottom of the page, showing which seats are available, occupied, or considered preferential. The bottom right corner shows the number of available seats by class of service for this flight.
19. Select any Available Seat by clicking the seat icon. 	Select Preferential seats, if you have preferred status on the selected airline. Your frequent flyer number must be in your Concur Travel profile. If you select a preferential seat and this information is not in Concur Travel, your seat request might not be honored.

Seat Map



Close

Delta Flight: 1456 McDonnell Douglas MD-90
 Raleigh Durham Intl Arpt (RDU) - Hartsfield Intl Arpt (ATL)
 01/19/2015



Available seat
 Occupied seat
 Preferential seat;
 Exit row
 Leave vacant or assign last seat
 Selected Seat

Preferential seating is not generally available for discounted fares, or travelers without higher levels of frequent flyer status. 

Seat assignment is subject to change up until time of departure

Step 1: Make a Flight Reservation (Continued)

How to... Additional Information

- 20. Click **Reserve Flight and Continue** Review all information before reserving flight(s).

Review and Reserve Flight

REVIEW FLIGHTS

Outbound flight: Raleigh, NC (RDU) - Atlanta, GA (ATL) Mon, Jan 19		
Delta #1456	Raleigh Durham Intl Ar... (RDU) Depart: Monday, 06:00 am Stops: 0 Duration: 1h 33m Economy: H McDonnell Douglas MD-90	Hartsfield Intl Arpt (ATL) Arrive: Monday, 07:33 am
Return flight: Atlanta, GA (ATL) - Raleigh, NC (RDU) Wed, Jan 21		
Delta #1077	Hartsfield Intl Arpt (ATL) Depart: Wednesday, 01:50 pm Stops: 0 Duration: 1h 22m Economy: L McDonnell Douglas MD-90	Raleigh Durham Intl Ar... (RDU) Arrive: Wednesday, 03:12 pm

ENTER TRAVELER INFORMATION

Ensure all traveler information below is correct.

PRIMARY TRAVELER [Edit](#) | [Review all](#)

Name: Kimberly Michelle Howe Phone: (919) 990-3515

Frequent Flyer Programs [Add a Program](#)

For Delta

SEAT ASSIGNMENT

Make your trip more enjoyable by selecting your seats now. Otherwise, Concur will request them for you.

[Select Seats](#)

REVIEW PRICE SUMMARY

Description	Fare	Taxes and Fees	Charges
Airfare	\$359.07	\$55.13	\$414.20
Total Estimated Cost : \$414.20 USD			
Total Due Now: \$414.20 USD			

METHOD OF PAYMENT

This purchase will be charged to your company directly.

ACCEPT FARE RULES AND RESTRICTIONS

This is a Non-Refundable Ticket

Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carrier's system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only.

Please review the rules and restrictions listed below.
When you purchase your ticket, you agree to these rules and restrictions.

Please note that the most restrictive set of rules below applies to your entire itinerary.

Click Fare to view Rules [\[Raleigh - Atlanta\]](#) [\[Atlanta - Raleigh\]](#)

DELTA [Raleigh - Atlanta](#)

By completing this booking, you agree to the fare rules and restrictions and hazardous goods policy.

[Back](#) [Reserve Flight and Continue](#)



Section 4: Make a Travel Reservation (Continued)

Step 2: Select a Rental Car

How to...	Additional Information
-----------	------------------------

1. If you selected **Pick Up/Drop off Car at airport** on the **Flight** tab, you will see the results for the car search.

If you click **Automatically reserve this car**, Concur Travel & Expense will add your car and then display your hotel results.

You can sort the car results to help find your selection.

Yellow diamonds indicate preferred vendors and your preferred car type will be selected automatically.

2. Select the appropriate rental car by clicking **Select**.

If you would like to wait on renting a car, click **Skip**.

Trip Summary

Flights Reserved

Round Trip
RDU - ATL
Outbound: Mon, 01/19/2015
Return: Wed, 01/21/2015

Select a Car

Days: 2
ATL - Terminal
Pick-up: Mon, 01/19/2015
Drop-off: Wed, 01/21/2015

Select a Hotel Remove

Nights: 2
Atlanta, GA
Check-in: Mon, 01/19/2015
Check-out: Wed, 01/21/2015

Finalize Trip

Pick up: (ATL) on Mon, Jan 19 07:33 AM
Return: Wed, Jan 21 01:50 PM Print / Email

[Hide matrix](#)

All 46 results	Economy Car	Compact Car	Intermediate Car	Standard Car	Full-size Car	Premium Car	Luxury Car	Mini Van	Intermediate SUV
	56.00	57.00	59.00	60.00	63.00	73.00	--	86.00	86.00
	56.00	57.00	59.00	60.00	63.00	73.00	--	86.00	86.00
	64.02	64.02	70.92	71.81	71.81	75.72	--	85.03	75.72
	59.51	61.60	63.60	65.60	67.60	84.00	102.60	--	84.00

Displaying: 46 out of 46 results. << Previous 1 2 3 4 5 Next >> | All

Sorted By: Policy - Most Compliant

Economy Car (Sabre) [more info](#)

\$56.00 per day
(Corporate rate)
[Select](#)

Unlimited miles
Automatic transmission
Total cost **\$225.83***

Compact Car (Sabre) [more info](#)

\$57.00 per day
(Corporate rate)
[Select](#)

Unlimited miles
Automatic transmission
Total cost **\$229.50***

Intermediate Car (Sabre) [more info](#)

\$59.00 per day
(Corporate rate)
[Select](#)

Unlimited miles
Automatic transmission
Total cost **\$236.83***

Economy Car (Sabre) [more info](#)

\$56.00 per day
(Corporate rate)
[Select](#)

Unlimited miles
Automatic transmission
Total cost **\$225.83***

Premium Car (Sabre) [more info](#)

\$73.00 per day
(Corporate rate)
[Select](#)

Unlimited miles
Automatic transmission
Total cost **\$288.16***

Car type is one of Intermediate SUV, Standard SUV, Full-size SUV, Premium Car, Luxury Car
 Car rate greater than \$60 per day
 Car size exceeds company preferred size of Intermediate Car

Displaying: 46 out of 46 results. << Previous 1 2 3 4 5 Next >> | All

Total cost: Rates and total cost do not include charges for optional services such as fuel and insurance waivers. These and any additional fees or surcharges may be applied at the time of rental. Any currency conversion is based on the exchange rate for that day. The final price at the time of rental may be different.

Skip Car Cancel

Step 2: Select a Rental Car (continue)

How to...

Additional Information

3. **Review and Reserve Car** page will appear. Verify information is correct, and then click **Reserve Car and Continue**.

Review and Reserve Car

REVIEW RENTAL CAR

National Car Rental [Location Details](#)

Type	Pick-up	Drop-off
Economy Car	Airport Terminal	Airport Terminal
Features	ATL: Atlanta	ATL: Atlanta
	07:33 am Mon, 01/19/2015	01:50 pm Wed, 01/21/2015

PROVIDE RENTAL CAR PREFERENCES

Your preferences and comments will be passed to the rental car agency.

Comments (30 character max)

Ex: Need early pick-up (10am)

Include in-car GPS system Include ski rack

ENTER DRIVER INFORMATION

Ensure the name below matches the I.D. you have with you on the day of pick-up. [?](#)

DRIVER

[Edit](#) | [Review all](#)

Name: Kimberly Michelle Howe Phone: (919) 990-3515

Rental Car Agency Program [Add a Program](#)

REVIEW PRICE SUMMARY

Description	Daily Rate	Dates	Total
National Car Rental	\$56.00	Jan 19 - Jan 21	\$112.00

Total Estimated Cost : \$225.83 USD*

Total Due Now: \$0.00 USD†

* Does not include additional fees incurred during time of travel.

† Remaining amount due at rental location.

[Back](#)

[Reserve Car and Continue](#)



Section 4: Make a Travel Reservation (Continued)

Step 3: Select a Hotel

How to...

1. If you selected the **Find a Hotel** option on the **Flight** tab, the hotel results are displayed after you choose your rental car.
2. Click the **More Info** link for a specific hotel to find more detailed information for the hotel.
3. When you are ready to reserve your hotel room, click **Choose Room** and click **Select** for the appropriate rate and hotel.
4. If you would like to wait on booking a hotel, click **Skip**.

Additional Information

You can sort the list of hotels by **Preference, Price, Chain, Rating, Distance** and **Policy**.

Next to each **Reserve** button, a description, rate details, and cancellation policy is available. The **Reserve** buttons are color coded as follows:

- A *green* **Reserve** button indicates the hotel rate is within policy.
- A *yellow* **Reserve** button indicates the hotel rate is outside of policy. If you select this rate, you must enter additional information.
- A *red* **Reserve** button indicates the hotel rate is outside of policy. If you select this rate, you must enter additional information and wait for manager approval. The trip will not be ticketed until it is approved.

You will see a notification if a hotel is outside of policy. You can view the type of rate and room, as well as other information that is available from the agency system.

After clicking the **Reserve** button, the Hotel confirmation page appears.

Step 3: Select a Hotel (Continued)

Trip Summary

- Flights Reserved**
 - Round Trip
 - RDU - ATL
 - Outbound: Mon, 01/19/2015
 - Return: Wed, 01/21/2015
- Select a Hotel**
 - Nights: 2
 - Check-in: Mon, 01/19/2015
 - Check-out: Wed, 01/21/2015
- Finalize Trip**

Total Estimated Cost

Air	USD	414.20
	USD	414.20
Total		414.20

Change Search

Price

\$45 - \$2,500

Display Settings

E-Receipt Enabled

Neighborhood

- Ansley Park (1)
- Atlantic Station (1)
- Bedford Pine (1)
- Brookwood (1)
- Clifton Community (2)
- Downtown (7)
- Georgia Tech (1)

Hotel chain

Chain Superchain

- Country Inn (1)
- Courtyard (3)

[Check All](#) | [Reset](#)

Hotel Amenities

- Breakfast (31)
- Broadband Internet (43)
- Business center (47)
- Convention center (0)
- Dry cleaning (49)
- Fitness center (47)
- Game room (0)

Hotel amenities may change over time and without notice. Not all hotels have provided their amenities list.

Check-in Mon, Jan 19 - Check-out Wed, Jan 21

[Hide Map](#) [Print](#) / [Email](#)

Sorted By: Policy - Most Compliant | With names containing:

[Expand All Details](#)

Displaying: 75 out of 75 results. << Previous | Page: 1 of 8 | Next >> | All

- #### 1. Savannah Suites Pine St

140 Pine St NE
Atlanta, GA 30308
Bedford Pine
0.42 miles | [view map](#)

★★★★★
rate this hotel

from
\$46

[more info](#) | [compare](#) | [choose room](#)
- #### 2. Crowne Plaza Midtown

590 W Peachtree St NW
Atlanta, GA 30308
0.28 miles | [view map](#)

★★★★★
rate this hotel

from
\$107

[more info](#) | [compare](#) | [hide rooms](#)

\$107 Radius Travel - One Queen Size Bed Nonsmoking 220 Sqft Classic Room With One Queen Bed Flexible Workspace Brand New 42 Inch Flat Screen (Rate Code: OGNWTT) (Sabre)

\$107 Radius Key Hotel Program 250 - Ihg Rewards Club Bonus Points One Queen Size Bed Nonsmoking 220 Sqft Classic Room With One Queen Bed Flexible Workspace Brand New 42 Inch Flat Screen (Rate Code: OQNRNE) (Sabre)

\$110 Radius Key Hotel Program 250 - Ihg Rewards Club Bonus Points Standard Room Spacious Rm W The Bed Type Assigned Based Upon Availability At

- #### 3. Best Western Plus Inn at the Pea...

330 W Peachtree St NW
Atlanta, GA 30308-3517
Downtown
0.25 miles | [view map](#)

★★★★★
rate this hotel

from
\$116

[more info](#) | [compare](#) | [choose room](#)
- #### 4. Hyatt Place Atlanta/Downtown

330 Peachtree St NE
Atlanta, GA 30308
Techwood-Clark Howell Homes
0.19 miles | [view map](#)

★★★★★
rate this hotel

from
\$134

[more info](#) | [compare](#) | [choose room](#)

E-Receipt Enabled

Step 3: Select a Hotel (Continued)

How to...

5. Review and Reserve Hotel page will appear. Verify information is correct, and then click **Reserve Hotel and Continue**.

Additional Information

Review Hotel Room:

- Room Preferences
- Price Summary
- Cancellation Policy

Review and Reserve Hotel

REVIEW HOTEL ROOM

Crowne Plaza Midtown

Radius Travel - One Queen Size Bed Nonsmoking 220 Sqft Classic Room With One Queen Bed Flexible Workspace Brand New 42 Inch Flat Screen
2 Nights | 1 Guest*

Check-in	Check-out	Address	Phone
Monday, January 19, 2015	Wednesday, January 21, 2015	590 W Peachtree St NW Atlanta, Georgia 30308 United States of America	404-877-9000

* We reserve every hotel room for 1 guest only, regardless of the number of actual travelers sharing the room. The primary traveler's name is attached to the reservation for hotel check-in.

PROVIDE HOTEL ROOM PREFERENCES

Your preferences and comments will be passed to the hotel.

Comments (30 character max)

Ex: Need early check-in (10am)

Request foam pillows Request rollaway bed Request crib

ENTER HOTEL GUEST INFORMATION

Ensure the name below matches the I.D. shown on the day of check-in. ⓘ

HOTEL GUEST

[Edit](#) | [Review all](#)

Name: Kimberly Michelle Howe Phone: (919) 990-3515

Hotel Program [Add a Program](#)

REVIEW PRICE SUMMARY

Description	Nightly rate	Dates	Total
Crowne Plaza Midtown	\$107.10	Jan 19 - Jan 21	\$214.20
Total Estimated Cost : \$214.20 USD*			
Total Due Now: \$0.00 USD†			

* Does not include taxes or additional fees incurred during time of stay.
† Remaining amount due at hotel location.

SELECT A METHOD OF PAYMENT

The credit card you select will be held to confirm your reservation. You will not be charged in full until your hotel stay.

[Add credit card](#)

* Indicates credit card is a company card

ACCEPT RATE DETAILS AND CANCELLATION POLICY

Please review the rate details and cancellation policy provided by the hotel.

Crowne Plaza Midtown  CROWNE PLAZA
HOTELS & RESORTS

Please review the rate rules and restrictions before continuing.

The hotel provided the following information:

RATE: USD 107.10
TOTAL RATE: 248.48 USD
EXTRA PERSON: \$10.00

I agree to the above rate rules, restrictions, and cancellation policy.

[Back](#) [Reserve Hotel and Continue](#)

Section 4: Make a Travel Reservation (Continued)

Step 4: Complete the Reservation

How to...

1. Review the details of the reservation on the **Travel Details** page, and then click **Next**.
2. On the **Trip Booking Information** page, enter your trip information in the **Trip Name** and **Trip Description** fields.
3. Click **Next**.

Additional Information

From the **Trip Details** page, you can add or make changes to the car, hotel as well as change the dates of the flight.

The trip name and description data are for your record keeping.

Trip Booking Information

The trip name and description are for your record keeping convenience.

Trip Name

This will appear in your upcoming trip list.

Trip from Raleigh to Atlanta

Trip Description (optional)

Used to identify the trip purpose

Send a copy of the confirmation to: ?

Send my email confirmation as

HTML Plain-text

Do you wish to request an American Airlines upgrade using your elite status?

Yes

Are you satisfied with your current seat selection? [Required]

Yes, I'm satisfied with my seats.

You may HOLD this reservation until: 12/23/2014 11:55 pm Eastern

Please enter information about this trip then press Next to finalize your reservation. If you close at this point your reservation may be cancelled.
Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.

Display Trip

Hold Trip

<< Previous

Next >>

Cancel

Step 4: Complete the Reservation (Continued)

How to...

- Review the details of the reservation on the **Travel Details** page, and then click **Next**.
- On the **Trip Booking Information** page, enter your trip information in the **Trip Name** and **Trip Description** fields.
- Click **Next**.
- On the **Trip Confirmation** page, click **Purchase Tickets** to finalize your trip.

Additional Information

From the **Trip Details** page, you can add or make changes to the car, hotel as well as change the dates of the flight.

The trip name and description data are for your record keeping.

Trip Confirmation

To COMPLETE BOOKING, please press the "Purchase Ticket" Button after reviewing this page.
To CANCEL, press the Cancel button.

Trip Overview

Trip Name: Trip from Raleigh to Atlanta
 Start Date: Jan 19, 2015
 End Date: Jan 21, 2015
 Created: Dec 22, 2014, Kimberly Howe (Modified: Dec 22, 2014)
 Description: (No Description Available)
 Agency Record Locator: LMRHWZ
 Passengers: Kimberly Michelle Howe
 Total Estimated Cost: \$414.20 USD

1 Airfare must be ticketed by an agent by: 12/23/2014 11:55 PM Eastern

Reservations

Monday, January 19, 2015

Flight Raleigh, NC (RDU) to Atlanta, GA (ATL)

Delta 1456

Departure: 06:00 AM
Seat: 28B (Confirmed)
 Raleigh Durham Intl Apt (RDU)
 Terminal: 2
 Duration: 1 hour, 33 minutes
 Nonstop

Arrival: 07:33 AM
Hartsfield Intl Apt (ATL)
 Terminal: SOUTH TERMINAL

Additional Details
Aircraft: Douglas MD-90
 E-Ticket
 Cabin: Economy (H)

Distance: 356 miles

Confirmation: G8VBPY
Status: Confirmed

Wednesday, January 21, 2015

Flight Atlanta, GA (ATL) to Raleigh, NC (RDU)

Delta 1077

Departure: 01:50 PM
Seat: 30B (Confirmed)
 Hartsfield Intl Apt (ATL)
 Terminal: SOUTH TERMINAL
 Duration: 1 hour, 22 minutes
 Nonstop

Arrival: 03:12 PM
Raleigh Durham Intl Apt (RDU)
 Terminal: 2

Additional Details
Aircraft: Douglas MD-90
 E-Ticket
 Cabin: Economy (L)

Distance: 356 miles

Confirmation: G8VBPY
Status: Confirmed

Total Estimated Cost

Air	View Fare Rules
Airfare quoted amount:	\$359.07 USD
Taxes and fees:	\$55.13 USD
Total Estimated Cost:	\$414.20 USD

Restrictions
Quote: NONREF/PENALTY APPLIES

TICKET NOT YET ISSUED. AIRFARE QUOTED IN ITINERARY IS NOT GUARANTEED UNTIL TICKETS ARE ISSUED.

Remarks

 IF YOU ARE CALLING MONDAY-FRIDAY 900AM-600PM EST
 PLEASE CONTACT YOUR TRAVEL CONSULTANTS AT
 800-525-4782 OR 860-688-1100.

IF YOU ARE CALLING OUTSIDE THESE HOURS, OR ARE
 EXPERIENCING A TRAVEL EMERGENCY PLEASE CONTACT
 AIRWAYS EMERGENCY SERVICE AT 800-331-3999.
 WHEN TRAVELING INTERNATIONALLY, PLEASE DIAL
 414-410-8399 FOR EMERGENCY ASSISTANCE.
 IDENTIFY YOURSELF WITH VIT CODE...8-TC1

ALL CHANGES ARE SUBJECT TO ANY ADDITIONAL FEES AND/
 OR PENALTIES BASED ON THE AIRLINE'S FARE RULES.
 REFUNDS MAY BE SUBJECT TO A FEE IMPOSED BY THE AIRLINES
 AND TICKETS MAY BE COMPLETELY NON-REFUNDABLE.

PLEASE REVIEW YOUR ITINERARY FOR ACCURACY UPON
 RECEIPT. CONTACT YOUR TRAVEL CONSULTANT WITHIN
 24 HOURS IF YOU NEED TO MAKE CHANGES.

 ** PLEASE ALLOW 2 HOURS DOMESTIC AND 3 HOURS INTL **
 ** FOR CHECK IN DUE TO HEIGHTENED SECURITY **

Almost done... Please confirm this itinerary.

[Display Trip](#)
[« Previous](#)
[Purchase Ticket»](#)
[Cancel](#)

Section 5: Cancel or Change an Airline, Car Rental, or Hotel Reservation

How to...	Additional Information
1. On the Home page, click My Trips .	
2. On the Trip Library page, click the name of the trip you want to change.	Flight changes are available for e-tickets that include a single carrier. If the trip is already ticketed but has not occurred, you can change the time of the flight if an even exchange is available or the ticket is refundable. Your change options will be with the same airline and routing.
3. On the Trip Overview page, select the action you want to take for the trip.	From the Trip Overview page, you can: <ul style="list-style-type: none">• Print Itinerary• Email Itinerary• Open in Outlook• View E-Receipts• View Trip History• Create Template• Clone Trip• Share Trip• Cancel Entire Trip

Note: You can cancel your trip from the **Trip Library** page. Under **Action** column, click on **Cancel Trip**.

Trip Overview

I want to... <ul style="list-style-type: none">Print ItineraryE-mail ItineraryOpen in OutlookView E-ReceiptsView Trip HistoryCreate TemplateClone TripShare TripCancel Entire Trip	Trip Name: Trip from Raleigh to San Diego (Edit) Start Date: Jan 12, 2015 End Date: Jan 15, 2015 Created: Oct 17, 2014, Description: San Diego Field Visit (Edit) Agency Record Locator: LWZDC Ticket Number(s): 00175014276	Add to your Itinerary <ul style="list-style-type: none"> Car Hotel Taxi
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Section 6: Create a New Expense Report

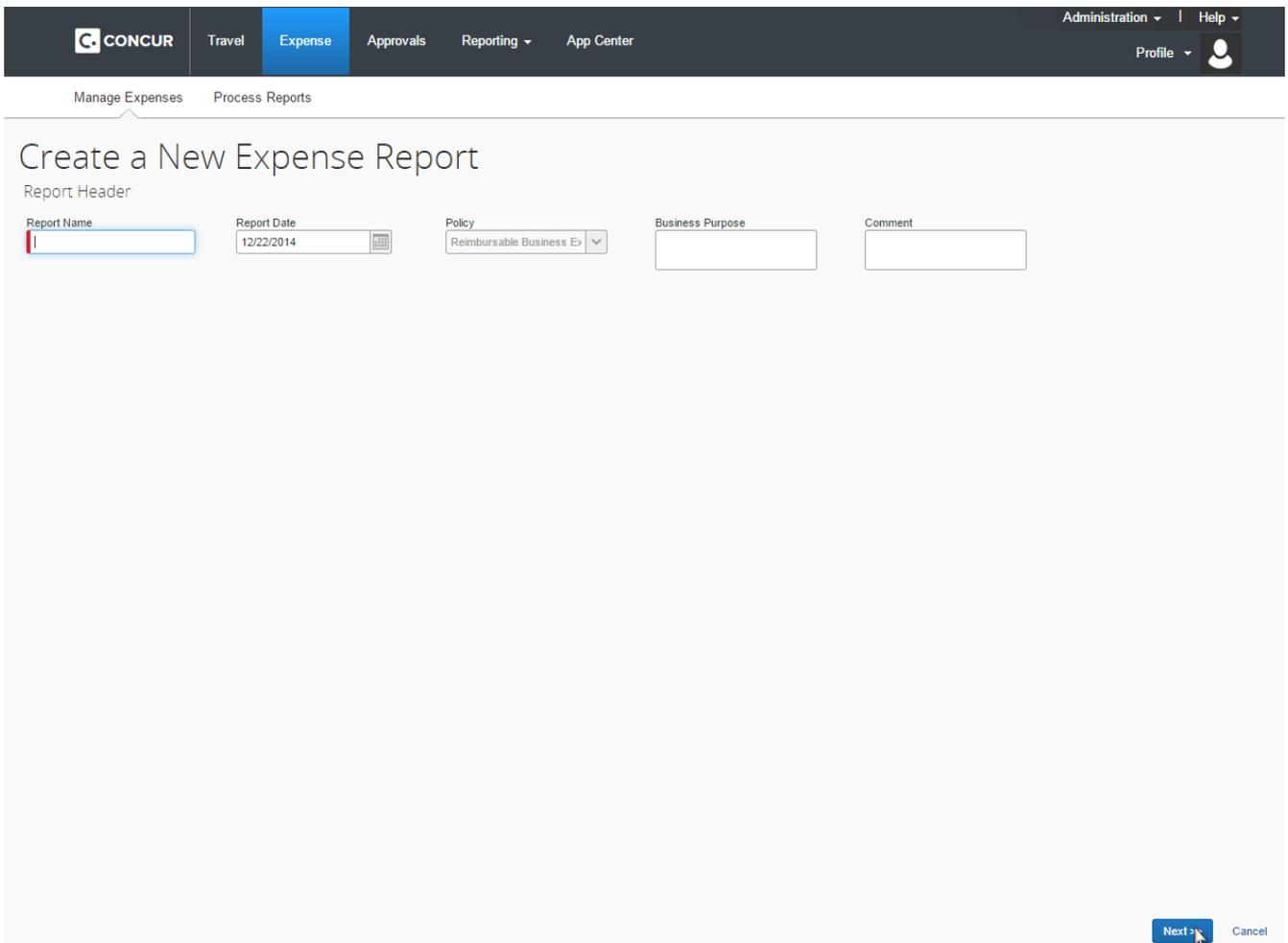
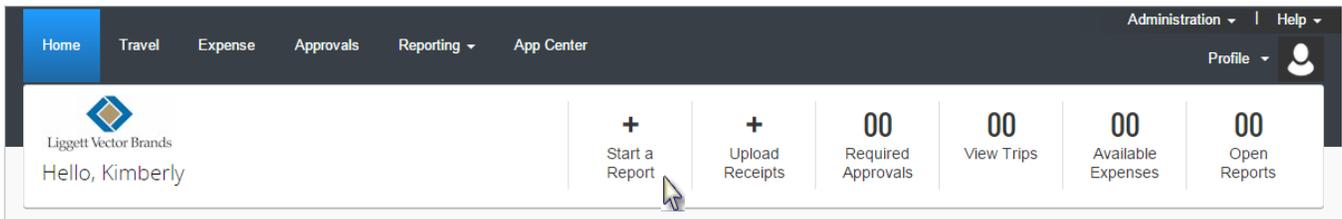
Step 1: Create a New Report

How to...

1. On the **Home** page, click **Start a Report**.
2. Complete all required fields (those with the red bar at the left edge of the field) and the optional fields as directed by your company.
3. Click **Next**.

Additional Information

The **Expense Report** page appears.



Section 6: Create a New Expense Report (Continued)

Step 2: Add a Company Card Transaction to the New Expense Report

Company card transactions are automatically imported into Expense for you – ready to be added to an expense report. Your company determines how frequently new card transactions appear.

How to...

1. On the **Expense Report** page, click the **Import** button.

Additional Information

The **Available Expenses** pane appears. You can combine trip data from Concur Travel (Itinerary), corporate card data (AMEX charge), and e-receipt data.

The screenshot shows the Concur Expense Report interface. At the top, there is a navigation bar with 'CONCUR' logo and tabs for 'Travel', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The 'Expense' tab is active. Below the navigation bar, there are options for 'Manage Expenses' and 'Process Reports'. The main header area displays 'K Howe 122214' and buttons for 'Delete Report' and 'Submit Report'. Below this, there are buttons for '+ New Expense', '+ Quick Expenses', and 'Import'. The 'Import' button is highlighted with a mouse cursor. Below the 'Import' button, there are buttons for 'Details', 'Receipts', and 'Print'. The main content area is divided into two panes. The left pane is titled 'Expenses' and has a table with columns for 'Date', 'Expense', 'Amount', and 'Requested'. Below this table is a button for 'Adding New Expense'. The right pane is titled 'New Expense' and contains an 'Expense' input field. Below the input field is a note: 'To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.' Below the note is a section for 'Recently Used Expense Types' with a green checkmark icon. This section lists 'Cellular Phone', 'Parking', 'Personal Car Company Use', and 'Company Car Wash'. Below this is a section for 'All Expense Types' which lists various categories such as 'Car Expense', 'Entertainment', 'HR', 'Individual Meals', 'Lodging', 'Communications', 'Other', 'Conferences/Meetings', and 'Transportation'. At the bottom of the interface, there is a summary table with two columns: 'TOTAL AMOUNT' and 'TOTAL REQUESTED', both showing '\$0.00'.

Step 2: Add a Company Card Transaction to the New Expense Report (Continued)

- In the **Available Expenses** section, select each transaction that you want to match and click **Match** button.
- Click the box next to the expense(s) to add and click **Import** tab. In the **Import dropdown** choose **To Current Report**.

You must match the AMEX charge, itinerary and/or e-receipt to the same expense. Refer to **Section 16: Matching AMEX, E-Receipt and Itinerary**, pages 62-63 for more details.

The expense appears on the left side of the page, with all applicable icons (i.e. AMEX Corporate card, itinerary, and e-receipts).

Available Expenses					
<input type="checkbox"/> Expense Detail					
Expense	Source	Date	Amount	Import	Match
<input checked="" type="checkbox"/> HAMPTON INN, Slidell, Louisiana	Hotel	01/05/2015	\$353.20	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> HAMPTON INN	Hotel	01/05/2015	\$310.00	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> HAMPTON INN, Slidell, Louisiana	Hotel	01/05/2015		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> JERSEY MKE'S 5047 ATLANTA, GA	Undefined	01/12/2015		<input type="checkbox"/>	<input type="checkbox"/>

Step 3: Add an Out-of-Pocket Expense to the Expense Report

How to...

- Click **New Expense**.
- Click **+New Expense** section, select the appropriate expense type or in the **Expense** field type in the appropriate expense type.

Additional Information

The page refreshes, displaying the required and optional fields for the selected expense type.

The screenshot shows the CONCUR web interface for adding a new expense. The user is logged in as K Howe 122214. The 'New Expense' form is open, displaying a list of expense types. The 'Expense' field is empty, and the user is prompted to select an expense type from the list below. The list is categorized into 'Recently Used Expense Types' and 'All Expense Types'. The 'All Expense Types' list includes categories like Car Expense, Entertainment, Personal Car Company Use, Business Meal with Attendees, and many others. The bottom of the page shows a summary table with 'TOTAL AMOUNT' and 'TOTAL REQUESTED' both at \$0.00.

TOTAL AMOUNT	TOTAL REQUESTED
\$0.00	\$0.00

Step 3: Add an Out-of-Pocket Expense to the Expense Report (Continued)

How to...

3. Complete all required fields (those with the red bar at the left edge of the field). Out-of-Pocket expenses will have a Payment Type "Cash."
4. Click **Save**.

Additional Information

For different types of expenses, such as hotel or company car mileage, refer to **Section 8: Using Special Features**, pages 40-49.

The expense appears on the left side of the page.

New Expense Available Receipts

Expense Type Company Car Wash	Transaction Date 12/11/2014	Business Purpose 08. General Administratic
Vendor Name Mr. C's Car Wash	City Raleigh, North Carolina	Payment Type Cash
Amount 8.00 USD	Comment Company Car monthly wash.	

Save Itemize Attach Receipt Cancel

Section 7: Review and Edit an Expense Report

You should review and edit (if necessary) your reports and all expenses, including company card transactions, for accuracy before submitting your expense report.

Step 1: Review the Report Information

How to...

1. On the **Expense Report** page, in the **Expense List**, click any transaction to view the details.
2. To review information on the **Report Header**, click the **Details** dropdown menu, select **Report Header**.
3. Make the appropriate changes, and then click **Save**.

Additional Information

The expense details appear on the right side of the page.

The **Report Header** page has the **Report Name**, **Report Date** and **Comment** fields for the expense report.

Step 2: Review the Exceptions

How to...

1. On the **Expense Report** page, click **Show Exceptions**.
2. Click the exception that you want to review.

Additional Information

The **Exceptions** pane opens, which displays all exceptions (flags or errors) for the expense report. In this pane, you can select an exception to view the expense details.

The expense details appear on the right side of the page.

Expense	Date	Amount	Exception
Cellular Phone	12/11/2014	\$126.00	✖ A brief description must be entered in the comments field.

Expenses

Date	Expense	Amount	Requested
12/11/2014	Cellular Phone Verizon Wireless, Raleigh, North	\$126.00	\$126.00

New Expense

Expense

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

3. Make the appropriate changes, and then click **Save**.

Section 7: Review and Edit an Expense Report (Continued)

Step 3: Edit Multiple Expenses

How to...

1. On the Expense Report page, in the **Expenses** List, select the checkbox for the expenses that you want to update.
2. Select the action you would like to perform for the expenses.

Additional Information

The multiple expense options box appears. When you select more than one expense, you will have the ability to delete, allocate, or edit the expenses at the same time.

If you choose to Edit the selected expenses, you will be prompted for all of the field(s) that you can update.

The screenshot shows the top of an expense report for user 'K Howe 122214'. It includes buttons for 'New Expense', 'Quick Expenses', 'Import', 'Details', 'Receipts', and 'Print'. Below is a table of expenses with columns for 'Date', 'Expense', 'Amount', and 'Requested'. Two expenses are selected with checkboxes: 'Cellular Phone Verizon Wireless, Raleigh, North' for \$120.00 and 'Company Car Wash Mr. C's Car Wash, Raleigh, North' for \$8.00. A dialog box on the right asks 'You have selected multiple expenses. What would you like to do?' with options: '1. Delete the selected expenses', '2. Allocate the selected expenses', and '3. Edit one or more fields for the selected expenses'.

<input type="checkbox"/>	Date	Expense	Amount	Requested
<input checked="" type="checkbox"/>	12/11/2014	Cellular Phone Verizon Wireless, Raleigh, North	\$120.00	\$120.00
<input checked="" type="checkbox"/>	12/11/2014	Company Car Wash Mr. C's Car Wash, Raleigh, North	\$8.00	\$8.00

Section 8: Use Special Features

Itemize Nightly Lodging Expenses

A hotel bill typically contains a variety of expenses including room fees, taxes, parking, meals, valet, telephone charges, and personal items. These expenses must be itemized so that they can be accounted for correctly in the Finance General Ledger. Concur Travel & Expense gives you the tools to quickly itemize your lodging-related expenses.

Step 1: Verify Auto-Itemized Hotel Expenses

The Hotel Auto-Itemization feature automatically itemizes any card transactions that have hotel folio data or an e-receipt from a hotel vendor. Your company determines if your hotel expenses are automatically itemized. If not, you can manually itemize your hotel expenses as described in Step 2 below.

The result of hotel auto-itemization is similar to what you see if you manually itemize the hotel expense. Concur Travel & Expense itemizes the hotel expense based on predetermined mapping. Examples of the itemizations you will see on your expense report are: parking, meals, and internet access. You can update the auto-itemized expenses and itemize any remaining balance as described in Step 3 below.

Itemize Nightly Lodging Expenses (Continued)

Step 2: Create and Itemize a Lodging Expense

How to...

1. Click **New Expense**.
2. On the **New Expense** tab, select the lodging expense type.
3. Complete the required fields on the page as usual.
4. Click **Itemize**.

Additional Information

The **New Expense** tab appears.

The expense appears on the left side of the page and the **Nightly Lodging Expenses** tab appears.

New Expense Available Receipts

Expense Type Hotel	Transaction Date 12/11/2014	Business Purpose 06. LVB Meetings & Cont
Vendor Marriott Hotels	City Raleigh, North Carolina	Payment Type AMEX
Amount 254.00 USD	Comment LVB Meeting	

Step 2: Create and Itemize a Lodging Expense (Continued)

5. On the **Nightly Lodging Expenses** tab, in the **Check-in Date** field, type the date or use the calendar. The number of nights appears automatically.
6. In the **Room Rate** field, enter the amount that you were charged per night for the room.
7. In the **Room Tax** fields, enter the amount of each room tax that you were charged.
8. In the **Additional Charges (each night)** section, from the first **Expense Type** dropdown menu, select the appropriate expense type.
9. In the **Amount field**, enter the amount of the expense. System will show the charge for each night.

ExpenseNightly Lodging ExpensesAvailable Receipts

Check-in Date

Check-out Date

Number of Nights

Recurring Charges (each night)

Room Rate <input type="text" value="198.00"/>	Room Tax <input type="text" value="28.00"/>
Other Room Tax 1 <input type="text" value="10.00"/>	Other Room Tax 2 <input type="text" value="13.00"/>

Room rate and taxes will be shown as separate expenses

Additional Charges (each night)

Expense <input type="text" value="Internet"/>	Amount <input type="text" value="5.00"/>
Expense <input type="text" value="Choose an expense type"/>	Amount <input type="text"/>

Itemize Nightly Lodging Expenses (Continued)

Step 2: Create and Itemize a Lodging Expense (Continued)

How to...

- Repeat steps 8-9 using the second **Expense Type** field if you have more than one recurring additional charge.
- Click **Save Itemizations**.

Additional Information

If there is a remaining amount to be itemized, the remaining amount is displayed and the **New Itemization** tab appears.

Step 3: Itemize the Remaining Balance

How to...

- If the amount remaining is more than zero, on the **New Itemization** tab, click the **Expense Type** dropdown arrow, and then select the appropriate expense from the dropdown list.
- Complete all required and optional fields as directed by your company.
- Click **Save**.
- Repeat steps 1-3 until the **Remaining Amount** equals \$0.00.

Additional Information

The page refreshes, displaying the required and optional fields for the selected expense type.

The expense appears on the left side of the page and the remaining amount equals zero.

The screenshot displays a software interface for managing expenses. At the top, an 'Exceptions' dialog box is open, showing a table with one entry: 'Hotel' on '12/11/2014' for '\$192.00'. A red error message states: 'The itemization amounts do not add up to the expense amount.' Below this, the main 'Expenses' section contains a table with columns for 'Date', 'Expense', 'Amount', and 'Requested'. The first row is selected, showing '12/11/2014' for 'Hotel Embassy Suites, Raleigh, North' with an amount of '\$192.00' and a requested amount of '\$163.00'. A red error message is also present here: 'The itemization amounts do not add up to the expense amount.' Below the main table is an 'Adding New Itemization' section with three rows: 'Internet' (\$5.00), 'Hotel' (\$125.00), and 'Hotel Tax' (\$33.00). At the bottom, a summary shows 'TOTAL AMOUNT \$163.00' and 'TOTAL REQUESTED \$163.00'. On the right side, the 'New Itemization' form is visible, showing a dropdown menu for 'Expense Type' with the text 'Choose an expense type'. At the top right of this form, it displays 'Total Amount: \$192.00 | Itemized: \$163.00 | Remaining: \$29.00'. At the bottom right of the form are 'Save' and 'Cancel' buttons.

Section 8: Use Special Features (Continued)

Add Attendees

For some expense types, such as business meals or entertainment, your company might require that you list the attendees who were present at these events.

How to...

1. Click **New Expense**.
2. On the **New Expense** tab, select an Entertainment, or Business Meals expense type.
3. Complete all required fields *except* the attendee information.

Additional Information

The **New Expense** tab appears.

Your company defines the expense type names that apply to entertaining clients, customers, or group business meals that include employees.

In the attendee area, your name automatically appears as an attendee with the full amount of the expense. As you add attendees to the expense, the expense amount is distributed over all attendees.

New Expense Available Receipts

Expense Type: Business Meal with Atten | Transaction Date: 12/16/2014 | Business Purpose: 06. LVB Meetings & Conf | Vendor Name: Capital City Chop House | City: | Payment Type: Cash | Amount: 95.00 USD | Comment: Finance meeting.

Attendees Attendees: 1 | Attendee Total: \$95.00 | Remaining: \$0.00

New Attendee | Advanced Search | Favorites | Search Recently Used | Modify

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	Amount
<input type="checkbox"/>	Howe, Kimberly	Finance		Employee	\$95.00

Save | Itemize | Attach Receipt | Cancel

Add Attendees (Continued)

How to...

4. Click **Advance Search**.
5. On the **Search Results** window, select the attendee and click **Add to Expense**.
6. To add a new attendee to the expense, click **New Attendee**. Complete the required information, and then click **Save**.
7. Click **Save**.

Additional Information

Search for employees. Type in the last name and click **Search**.

Add a business guest. If you have entered the business guest name in the past, search by clicking **Favorites**.

The expense appears on the left side of the page.

Search Attendees ✕

Search Attendees | Favorites | Recently Used | Attendee Groups

Choose an Attendee Type
Employee

Last Name: Anson | First Name: | Attendee Title: |

Search | Reset

Search Results

<input checked="" type="checkbox"/>	Email Address	Attendee Name	Attendee Title	Company	Attendee Type
<input checked="" type="checkbox"/>	nanson@lvbran...	ANSON, NICHOLAS P.	Finance		Employee

Page 1 of 1 | Displaying 1 - 1 of 1

New Attendee | **Add to Expense** | Delete | Close

Add Attendee ✕

Attendee Type: Business Guest | Last Name: Doe

First Name: John | Attendee Title: Auditor

Company: Audit Inc.

Save & Add Another | **Save** | Cancel

Section 8: Use Special Features (Continued)

Itemize Expenses

Use the Itemize feature to account for expenses that include both business and personal items or to make sure that each of your expenses is billed to the correct department in your organization.

How to...

1. On the **Expense Report** page, click the expense you want to itemize.
2. Click **Itemize**.
3. On the **New Itemization** tab, click the **Expense Type** dropdown arrow, and then select the appropriate expense.

Additional Information

The page refreshes, displaying the required and optional fields for the selected expense type.

The expense appears on the left side of the page. The **New Itemization** tab appears which displays the total amount, itemized amount, and remaining amount.

The page refreshes, displaying the required and optional fields for the selected expense type.

New Expense Available Receipts

Expense Type: Office Supplies

Transaction Date: 12/11/2014

Business Purpose: 08. General Administrator

Vendor Name: Staples

City: Raleigh, North Carolina

Payment Type: AMEX

Amount: 62.00 USD

Comment:

Save Itemize Attach Receipt Cancel

Itemize Expenses (Continued)

How to...

- Click **Save**.
- Repeat steps 3-5 until the **Remaining Amount** equals \$0.00.

Additional Information

The itemized item appears in the expense list and the totals are adjusted accordingly.

As you click **Save** for each item, the remaining total changes accordingly.

Expenses

Date	Expense	Amount	Requested
12/11/2014	Office Supplies Staples, Raleigh, North Carolina	\$62.00	\$62.00

Adding New Itemization

New Itemization

Total Amount: \$62.00 | Itemized: \$0.00 | Remaining: \$62.00

Expense Type: Postage
Transaction Date: 12/11/2014
Business Purpose: 08. General Administration
Vendor Name: Staples
City: Raleigh, North Carolina
Payment Type: AMEX
Amount: 11.75 USD
Comment: Stamps for mailing letters to customers.

TOTAL AMOUNT: \$62.00 | TOTAL REQUESTED: \$62.00

Buttons: Save, Cancel

Expenses

Date	Expense	Amount	Requested
12/11/2014	Office Supplies Staples, Raleigh, North Carolina	\$62.00	\$11.75
12/11/2014	Postage	\$11.75	\$11.75

Adding New Itemization

New Itemization

Total Amount: \$62.00 | Itemized: \$11.75 | Remaining: \$50.25

Expense Type: Presentation Material
Transaction Date: 12/11/2014
Business Purpose: 08. General Administration
Vendor Name: Staples
City: Raleigh, North Carolina
Payment Type: AMEX
Amount: 40.00 USD
Comment: Letters printed for mailing.

TOTAL AMOUNT: \$11.75 | TOTAL REQUESTED: \$11.75

Buttons: Save, Cancel

Itemize Expenses (Continued)

Expenses Move Delete Copy View <<

Date	Expense	Amount	Requested
12/11/2014	Office Supplies Staples, Raleigh, North Carolina	\$62.00	\$51.75
Adding New Itemization			
12/11/2014	Postage	\$11.75	\$11.75
12/11/2014	Presentation Material	\$40.00	\$40.00

TOTAL AMOUNT \$51.75 TOTAL REQUESTED \$51.75

New Itemization Available Receipts

Total Amount: \$62.00 | Itemized: \$51.75 | Remaining: \$10.25

Expense Type Office Supplies	Transaction Date 12/11/2014	Business Purpose 08. General Administration
Vendor Name Staples	City Raleigh, North Carolina	Payment Type AMEX
Amount 10.25 USD	Comment Pens and tape.	

Save Cancel

Expenses Move Delete Copy View <<

Date	Expense	Amount	Requested
12/11/2014	Office Supplies Staples, Raleigh, North Carolina	\$62.00	\$62.00
12/11/2014	Postage	\$11.75	\$11.75
12/11/2014	Presentation Material	\$40.00	\$40.00
12/11/2014	Office Supplies	\$10.25	\$10.25

TOTAL AMOUNT \$62.00 TOTAL REQUESTED \$62.00

New Expense Available Receipts

Expense

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

Office Supplies	Hotel	Cellular Phone
Company Car Wash	Personal Car Company Use	

All Expense Types

Car Expense Company Car Maintenance Company Car Mileage Company Car Personal Trip >300 Company Car Storage Company Car Wash Gasoline Parking Personal Car Company Use Tolls Communications Cellular Phone Fax Internet Phone Conferences/Meetings Audio/Visual Communications Catering Conference Room Fees	Entertainment Entertainment-Other HR HR Recruitment Individual Meals Breakfast Business Meal with Attendees Dinner Lunch Lodging Hotel Other AMEX Rewards Point (Personal) Dues Employee Relations Incidentals Office Supplies Postage Professional Fees	...Other Subscriptions Personal Expenses Personal Expense POS POS - In-Transit (Archway) POS-Storage Rep/DIM Tradeshaw Tradeshaw Fees Training Training & Seminars Transportation Airfare Airline Fees Car Rental Subway Taxi Train
--	---	--

Section 8: Use Special Features (Continued)

Company Car Mileage

How to...

1. Click **New Expense**.
2. On the **New Expense** tab, select **Company Car Mileage** expense type.
3. In the **Transaction Date** field, type the date or use the calendar.
4. In the **Vehicle ID** and **Odometer (Start)** field, will default. Enter the **(End)** mileage in the second field.
5. In the **Distance (Business)** field will automatically calculate and default. Enter any **(Personal)** mileage in second field.
6. Click **Save**.

Additional Information

The **New Expense** tab appears.

Company Car must be set up prior in your **Profile – Company Car**.

Vehicle ID will default based on your **Profile – Company Car** information. **Odometer (Start)** field, you will need to enter the number of miles the first time you enter the expense type.

The **Mileage Calculator** helps you to determine mileage between locations.

The expense appears on the left side of the page.

The screenshot shows the 'New Expense' form with the following fields and values:

- Expense Type:** Company Car Mileage
- Date:** 12/22/2014
- Description:** (empty)
- Vehicle ID:** def456
- Odometer (Start - End):** 15068 - 16102
- Number of Passengers:** 0
- Total Distance : Amount:** 1034 (USD) : 0.00
- Distance (Business, Personal):** 849 (Business), 185 (Personal)
- Distance to Date:** 0

At the bottom right, there is a **Mileage Calculator** icon and three buttons: **Save**, **Attach Receipt**, and **Cancel**.

Section 9: Attach and Delete Receipts

Fax or Attach Scanned Receipt Images

With Concur Imaging, you can fax your receipts or you can attach scanned images of your receipts.

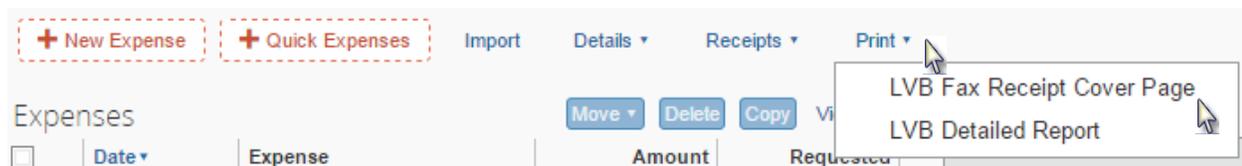
Fax Receipt Images

How to...

1. From the **Print** dropdown menu, select **LVB Fax Receipt Cover Page**.
2. Click **Print**.
3. Fax the cover page and the receipts to the number on the cover page.

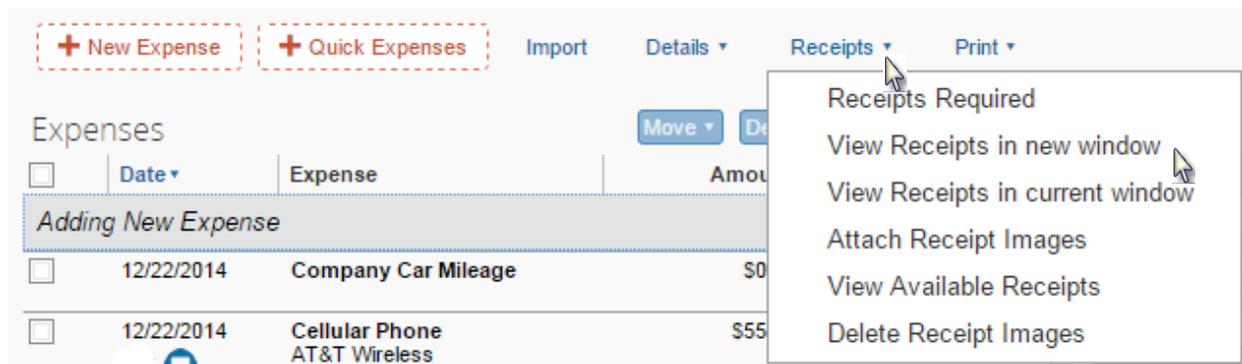
Additional Information

The fax cover page appears.



4. To view the faxed receipts, from the **Receipts** dropdown menu, select **Check Receipts**.

After you have checked receipts for the first time, you will see two different options on the Receipts menu: **View Receipts in New Window** and **View Receipts in Current Window**.

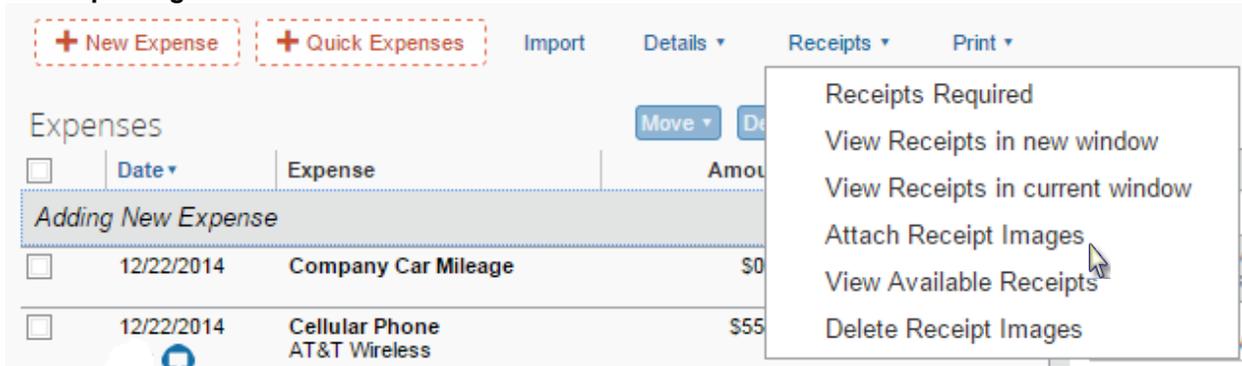


Section 9: Attach and Delete Receipts (Continued)

Attach Scanned Receipt Images

How to...

1. On the **Expense Report** page, from the **Receipts** dropdown menu, select **Attach Receipt Images**.



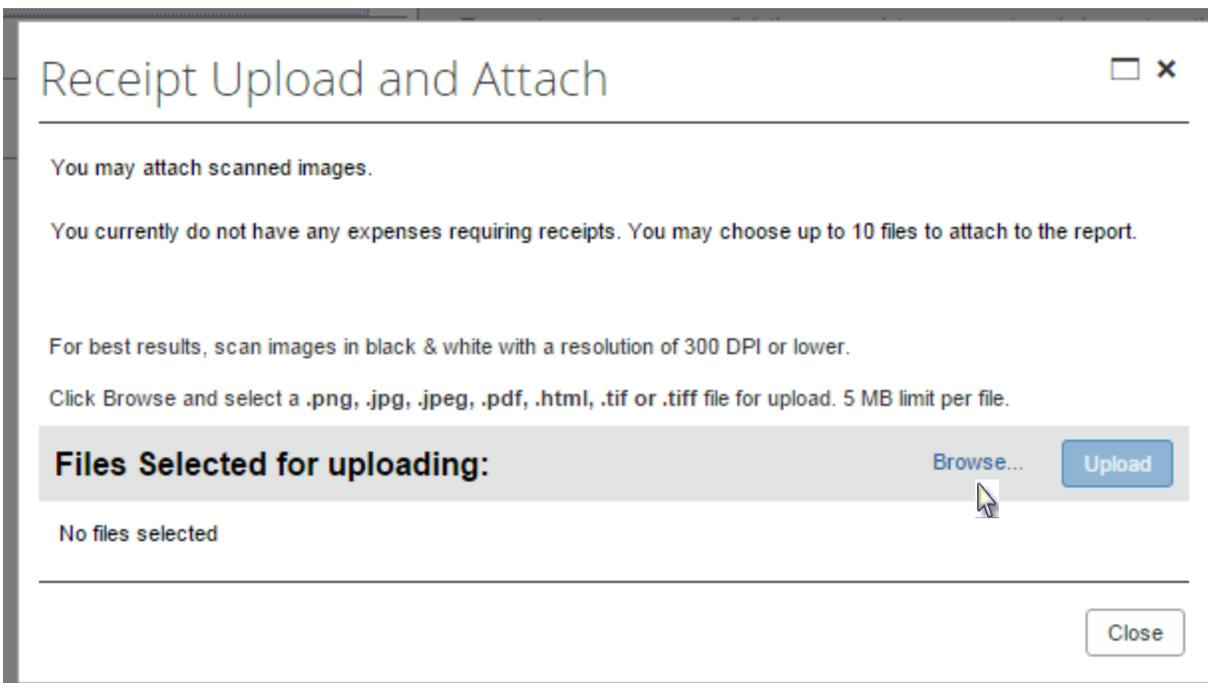
Additional Information

The **Attach Files** window appears.

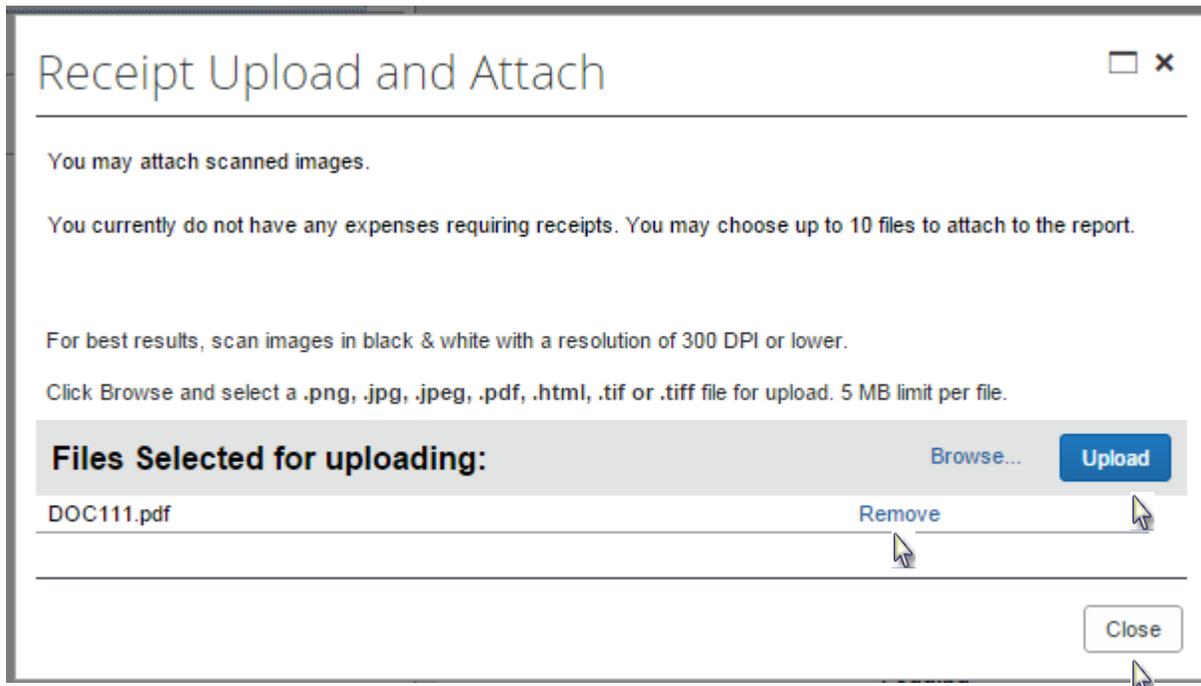
2. Click **Browse**, and then locate the file you want to attach.
3. Click the file, and then click **Open**.
4. To attach another image, click **Browse**, and then repeat the process.
5. Click **Upload**, and then click **Close**.

The selected file appears in the **Files Selected for Uploading** section of the window.

To remove receipt (file) before **Upload**, click **Remove**.



Attach Scanned Receipt Images (Continued)



Delete Receipt Images added by Fax or Receipts dropdown menu

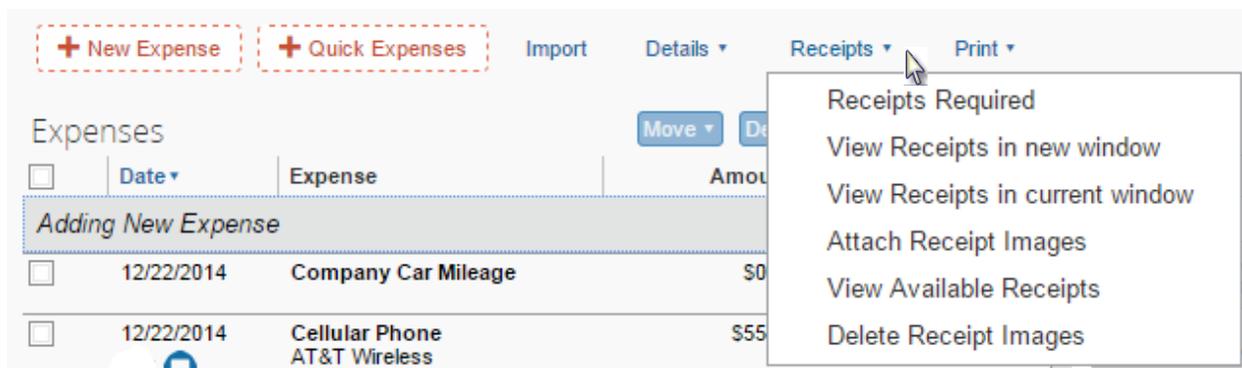
How to...

1. On the **Expense Report** page, from the **Receipts** dropdown menu, select **Delete Receipt Images**.
2. In the confirmation window, click **Yes**.

Additional Information

A confirmation window appears.

When you select the Delete Receipt Images option, all attached images are deleted. You cannot delete individual receipt images.



Section 9: Attach and Delete Receipts (Continued)

Delete Receipt Images added by using the Available Receipts window (E-Receipts or Mobile)

How to...

1. On the **Expense Report** page, locate the expense and hover over the **Receipt Icon**.
2. The receipt will come up in a separate window, click **Detach From Entry**.

Additional Information

When you detach a receipt, the receipt automatically sent back in to your **Available Receipts** window.



Section 10: Submit and Re-submit Expense Reports

Submit Your Completed Expense Report

If the approver wants you to make changes to your expense report, you will be notified by email and the report will be sent back to you. The expense report will need to be re-submitted with the changes you make and go through the approval process again.

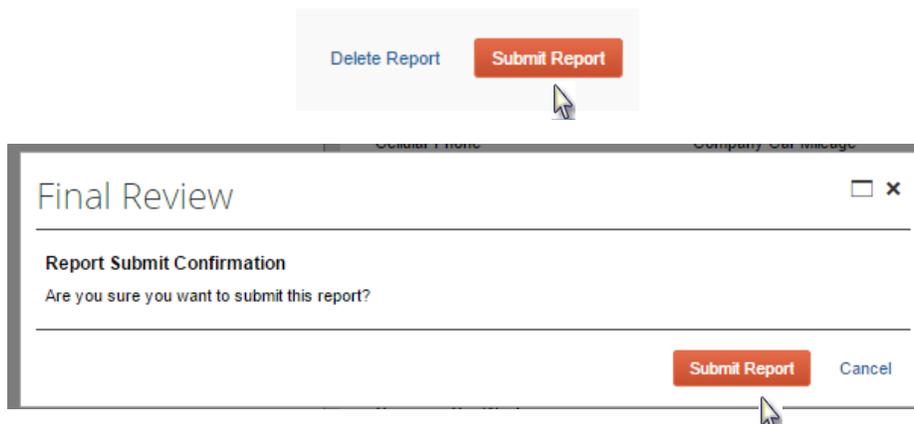
How to...

1. On the **Expense Report** page, click **Submit Report** (orange button).
2. Click **Submit Report** (orange button).
3. Click **Submit Report** (blue button).

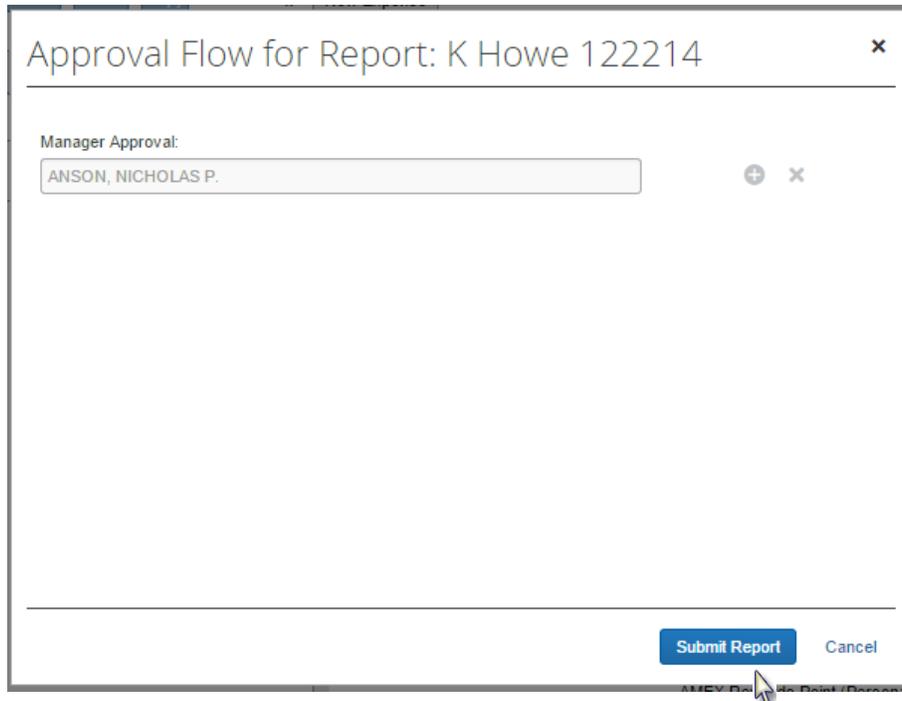
Additional Information

The **Final Review** window appears. If receipts are needed, the system will list all expenses requiring receipts.

The **Approval Flow** window appears.



Submit Your Completed Expense Report (Continued)



Approval Flow for Report: K Howe 122214

Manager Approval:

ANSON, NICHOLAS P.

Submit Report Cancel

Correct and Re-submit a Report Sent Back by Your Approver

If your approver requires changes or additional information, they will return your expense report. The returned report appears in the **My Tasks** or **Open Reports** section of the **Home** page, along with a comment from your approver.

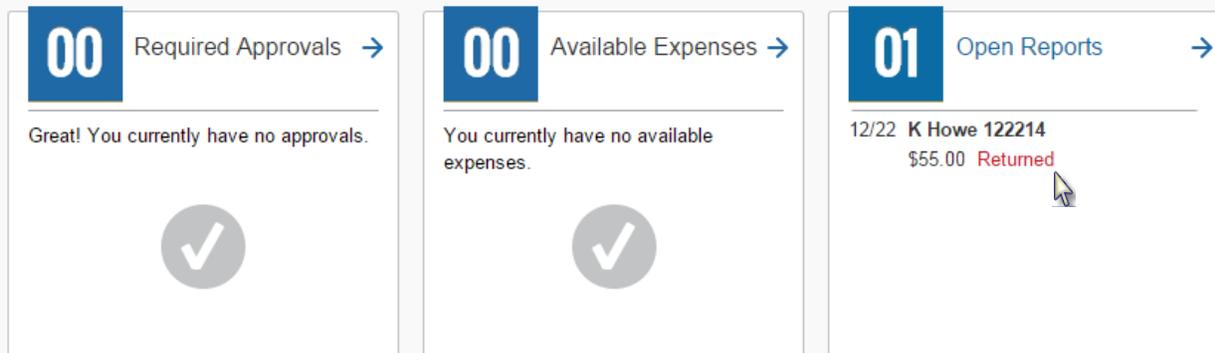
How to...

1. In **My Tasks** and **Open Reports**, click the report name (link) to open the report.
2. Make the requested changes.
3. Click **Save**.
4. Click **Submit Report**.

Additional Information

The **Expense Report** page appears.

MY TASKS

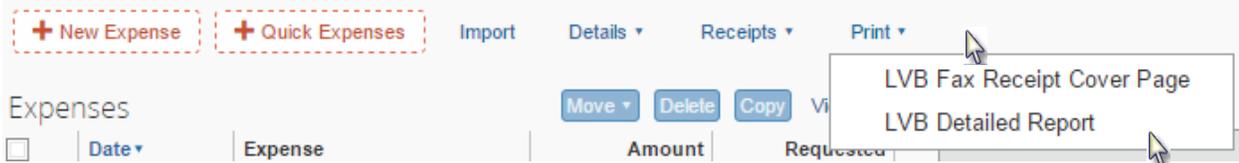


00 Required Approvals → Great! You currently have no approvals. ✓	00 Available Expenses → You currently have no available expenses. ✓	01 Open Reports → 12/22 K Howe 122214 \$55.00 Returned
--	--	--

Section 11: Print Expense Reports

How to...

1. From the **Print** menu, select **LVB Detailed Report**.
2. Click **Print**.
3. Click **Close**.



Additional Information

The two print options:

- For a fax cover page to use with Concur Imaging for faxing in receipt(s), select **Fax Receipt Cover Page**.
- For a detailed copy of the expense report, select **Detail Report**.

Section 12: Review and Approve Expense Reports

As an approver, you can approve an expense report “as is”; send an expense report back to the employee to modify and re-submit; or adjust the authorized amount of one or more “Out of Pocket” expenses to comply with company policy and then approve the expense report for the lowered amount.

Review and Approve an Expense Report

All reports awaiting your review and approval appear in the **Required Approval** section of **Home** page.

How to...

1. Click **Required Approvals** on the **Home** page.
2. Click on the expense report to review and approve.
3. To review the report information, from the **Details** dropdown menu, select **Report Header** (under **Report**).
4. To review expense entry information, click an expense entry.
5. When ready to approve, click **Approve**.

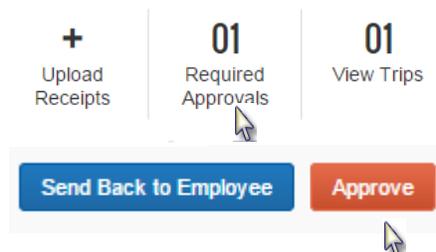
Additional Information

The **Expense Report** page appears.

The **Report Header** page appears. Click **Cancel** on the **Report Header** page.

The expense entry details appear on the right side of the page.

The report moves to the next step in the workflow.



Section 12: Review and Approve Expense Reports

Send an Expense Report Back to the Employee

All reports awaiting your review and approval appear in the **Required Approval** section of the **Home** page.

How to...

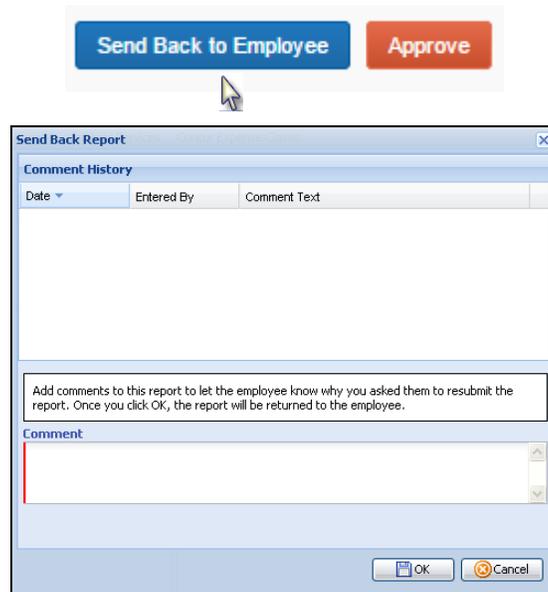
1. Click **Required Approvals** on the **Home** page
2. Click on the expense report to review and approve.
3. Click **Send Back to Employee**.
4. Enter a comment for the employee, and then click **OK**.

Additional Information

The **Expense Report** page appears

The **Send Back Report** box appears.

The report is returned to the employee.



Section 13: Action Icons

Icon	Description
	Airfare: Click to view your airfare booking information.
	Attendees: Indicates that an expense entry has associated attendees.
	Car Rental: Click to view booking information for your car rental.
	Credit Card Transaction: Indicates that an expense entry was from a credit card transaction.
	Comments: Indicates that an expense entry has comments associated with it.
	E-Receipt: Indicates that an e-receipt was imported for this entry.
	Exceptions: Indicates that an expense entry needs to be updated to meet requirements.
	Lodging: Click to view your lodging booking information.
	Receipt: Receipt image is required.
	Seat map: Click to view the flight seat map.
	Yellow Diamond: Indicates a company preferred vendor.

Section 14: Expense Types and Descriptions

The following expense types are as they appear in Concur Expense; the descriptions are to aid in consistent expense classifications.

Expense Types	Description
Airfare	Airline flights (include tips)
Airline Fees	Airline baggage fees, inflight meals, etc.
AMEX Rewards Points (Personal)	AMEX Rewards Points program – bought by the user for personal use. Charges will be treated the same as Personal Expense category. For AMEX late fees or delinquency fees use Personal Expense.
Audio/Visual Communications	Cost for sound system, presentation screen, micro-phone, etc. for a meeting or conference
Breakfast, Lunch and Dinner	Individual meals for the employee only; see Business Meal for meals including more than one person.
Business Meal with Attendees	Any meal with guest (employees, client or customer) with no entertainment
Car Rental	Car rentals
Catering	Outside restaurant or caterer provides food/beverages for a meeting or a conference
Cellular Phone	Cell phones charges (family members are excluded)
Company Car Maintenance	Maintenance, tune ups, and auto accessories
Company Car Personal Trip >300	Company car driven on a personal trip over 300 miles round trip; must have Manager's Approval before the trip.
Company Car Storage	Storage of a company car during a vacant position/echelon.
Company Car Wash	Car wash for company car
Conference Room Fees	Meeting space fees
Dues	Memberships (job related)
Employee Relations	Flowers, greeting cards, and employee incentives
Entertainment-Other	Business function with entertainment; i.e. golf fees, sports tickets, theater, concerts, etc. (includes meals at entertainment events)
Fax	Fax charges (not including home fax lines)
Gasoline	Gas for rental or personal cars with business use
Hotel	Hotel room charges; all hotel charges must be itemized
Incidental (rarely used)	Expenses that do not fit another category
Internet	Internet charges for home office, hotel, etc.
Office Supplies	Supplies needed for the job; i.e. paper, pens, staples, ink, etc. For printer toner, please send a request through Help Desk.
Parking	Any cost incurred due to parking (i.e. Airport, Hotel, etc.)
Personal Expense (unusual circumstances only)	Personal Items charged on your AMEX Corporate card or for AMEX late fees or delinquency fees. For AMEX Rewards Points Program annual fee use AMEX Rewards Points category.
Personal Use of Co. Car	Personal use of a company vehicle
Phone	Phone charges, other than cell phone (excludes home phones)
POS-Storage Rep/DM	POS storage facility charges
Postage	US Postal, FedEx charges, including shipping material

Section 14: Expense Types and Descriptions (Continued)

Expense Types	Description
Presentation Material	Presentations, flyers, etc. prepared and copied/bound, etc. for customer or potential customers
Professional Fees	Charges associated with outside service provider (consultants, meeting planner, POS merchandisers, lawyers, etc.)
Public Relations	Promotional items given to Customers (potential customers)
Subscription	Magazines, Newspapers – (job related)
Taxi	Includes tips given to taxi drivers
Tolls	Highway tolls, bridge tolls, etc.
Tradeshows	LVB – <u>Morrisville Office Use Only</u>
Training and Seminars	Business seminars or training related to an employee's position
Company Car Storage	Storage of a company car during a vacant position/echelon.

Section 15: Business Purpose and Descriptions

Business Purpose dropdown list selection should reflect the type of category and purpose for the business expense. The following is a helpful guide concerning expense categories, but there is room for interpretation and judgment, (i.e. Presentation Material could be more appropriate under LVB Meetings & Conferences than General Administration, Business Meals may be more appropriate under Customer Relations Meeting & Conferences) and should be explained in the Comments field:

Business Purpose	Description	(Typical) Category
Existing Chain HQ Call	Sales call on a chain store carrying LVB products. Includes existing sales maintenance and upsell calls. Includes planning and preparation for call (including presentation materials, etc.).	<ul style="list-style-type: none"> • Airfare • Car Rental • Hotel • Meals (Breakfast, Lunch or Dinner) • Business Meals with Attendees • Parking • Taxi • Tolls
Prospective Chain HQ Call	Sales call on a chain store not carrying LVB products. Includes all calls until chain takes first brand. Includes planning and preparation for call (including presentation materials, etc.).	
Chain Store Reviews / Set Ups	Chain store reviews by chain or retail personnel. Also includes new, expanded or refreshed store set ups.	
Retail Route Execution	Retail sales route execution for: routed priority stores, routed or un-routed opportunity stores, and retail chain HQ calls.	
Work Withs / Behinds	Includes all review activities, whether working with, behind or any other planned or unplanned similar performance review activity.	
LVB Meetings & Conferences (Comments Required)	Attended by LVB personnel only, e.g. region sales meeting, region director annual meeting, strategy meeting, etc.	<ul style="list-style-type: none"> • Audio/Visual Communications • Catering • Conference Room Fees
Customer Relations Meeting & Conferences (Comments Required)	Attended by customers and LVB personnel. Can be presented by customer or LVB. Primarily related to enhancing the customer relation. Includes sporting events, golf outings, customer vendor conference, etc.	<ul style="list-style-type: none"> • Public Relations

Section 15: Business Purpose and Descriptions (Continued)

Business Purpose	Description	(Typical) Category
General Administration (Comments Required)	<p>Includes those costs not specifically identifiable with a category otherwise identified in the category dropdown list. Includes such items as: gasoline, cell phone, internet, office supplies, dues and subscriptions, company car maintenance, etc. If such items are specifically related to a category in the dropdown list, then that category should be selected.</p>	<ul style="list-style-type: none"> • Company Car Maintenance • Company Car Wash • Cellular Phone • Dues • Employee Relations • Fax (unless at a hotel) • Internet (unless at a hotel) • Office Supplies • POS-Storage Rep/DM • Phone (unless at a hotel) • Presentation Material • Postage • Professional Fees • Subscriptions
Training & Development (Comments Required)	<p>Includes all professional development activities, e.g. formal training and development classes, self-study training and development, internal training and development, and training conducted by LVB personnel for new employees.</p>	<ul style="list-style-type: none"> • Training and Seminars
Tradeshows (Comments Required)	<p>Includes customer and vendor tradeshows, as well as those sponsored by a third party, e.g. NACS.</p>	<ul style="list-style-type: none"> • Tradeshow Fees category
Other (Comments Required)	<p>Includes anything that does not logically fall into one of the other specific categories.</p>	<ul style="list-style-type: none"> • AMEX Rewards Points (Personal) • Company Car Personal Trip >300 • Incidentals • Personal Expense

Section 16: Matching AMEX, E-Receipt and Itinerary

Expenses incurred for travel (air, hotel and car rental) sometimes must be matched before importing into an expense report. This is due to information being downloaded into your Concur Expense account from various aspects of the Concur T&E system. By matching your AMEX charge, Itinerary and E-Receipt before importing in to your expense report, it gives a complete picture of the expense and your receipt is already attached. Based on the situation, not all expenses will have all three items and may only have one or two items.

You will notice expense items already in your **Available Expenses**. Each expense line contains an Icon(s). Icons are very important when processing an expense report.

Icons:

 - AMEX Charge – Information is downloaded from AMEX
 Itinerary – Information filtered from Concur Travel

 - Air

 - Hotel

 - Car Rental

 - E-Receipt – Information comes from the Vendor & Expense Travel

Step 1: Click the appropriate boxes and click **Match**.

Available Expenses ✕				
<input type="button" value="Import"/> <input type="button" value="Match"/> <input type="button" value="Unmatch"/> <input type="button" value="Delete"/>				
<input type="checkbox"/> Expense Detail	Expense	Source	Date ▲	Amount
<input checked="" type="checkbox"/>	HAMPTON INN, Slidell, Louisiana	Hotel 	01/05/2015	\$353.20
<input checked="" type="checkbox"/>	HAMPTON INN	Hotel 	01/05/2015	\$310.00
<input checked="" type="checkbox"/>	HAMPTON INN, Slidell, Louisiana	Hotel 	01/05/2015	\$353.20
<input type="checkbox"/>	JERSEY MKE'S 5047 ATLANTA, GA	Undefined 	01/12/2015	\$8.79

Step 2: Now, your expense has matched to one expense line and ready to be imported, click **Import**.

Available Expenses ✕				
<input type="button" value="Import"/> <input type="button" value="Match"/> <input type="button" value="Unmatch"/> <input type="button" value="Delete"/>				
<input type="checkbox"/> Expense Detail	Expense	Source	Date ▲	Amount
<input checked="" type="checkbox"/>	HAMPTON INN, Slidell, Louisiana	Hotel   	01/05/2015	\$353.20
<input type="checkbox"/>	JERSEY MKE'S 5047 ATLANTA, GA	Undefined 	01/12/2015	\$8.79

Section 16: Matching AMEX, E-Receipt and Itinerary (Continued)

Step 3: Your expense has been imported into your expense report and ready to be updated.

Expenses				Move	Delete	Copy	View	«	
<input type="checkbox"/>	Date	Expense	Amount	Requested					
<input type="checkbox"/>	01/14/2015	Company Car Mileage	\$0.00	\$0.00					
<input checked="" type="checkbox"/>	01/05/2015	Hotel Hampton Inns, Slidell, Louisiana	\$353.20	\$353.20					

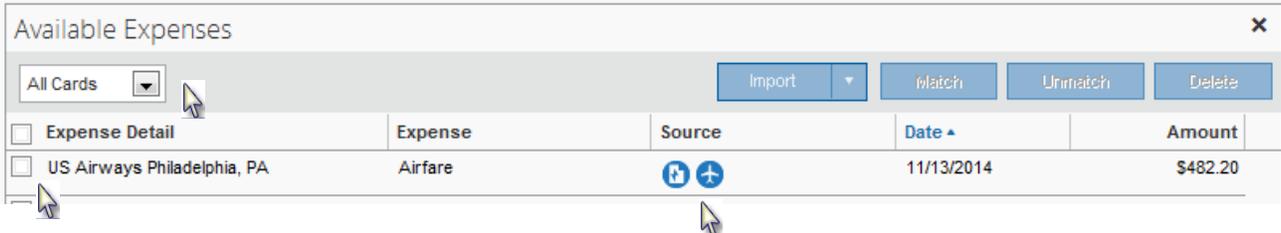
Expense		Nightly Lodging Expenses		Available Receipts	
Expense Type	Transaction Date	Business Purpose			
Hotel	01/05/2015				
Vendor	City	Payment Type			
Hampton Inns	Slidell, Louisiana	AMEX			
Amount	Comment				
353.20 USD					
<input type="button" value="Itemize"/> <input type="button" value="Attach Receipt"/> <input type="button" value="Cancel"/>					

TOTAL AMOUNT	TOTAL REQUESTED
\$353.20	\$353.20

Section: 17 Airfare and Airline Fees

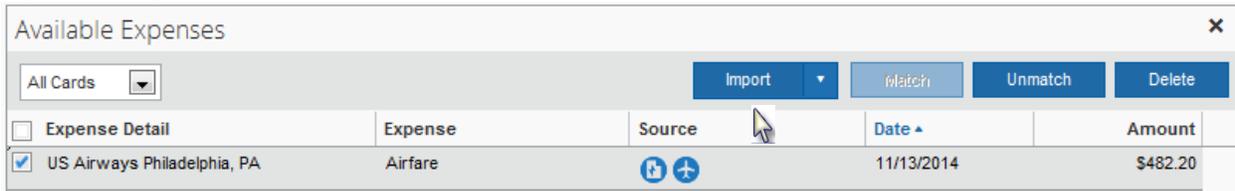
Airline charges consist of Airfare and Airline Fees (Baggage and Upgrade fees). You will not receive an AMEX charge for any Airline fees download in Concur. All AMEX Airline charges (including airfares, baggage fees and upgrades) are swiped to our Corporate AMEX account, which show \$0 on an individual's AMEX statement. Concur does not recognize \$0 dollars and therefore Airfare and Airline fees will never show in Concur as an AMEX charge.

- 1.) Check the appropriate Airline charge. Notice you only have an  E-Receipt and  Itinerary.



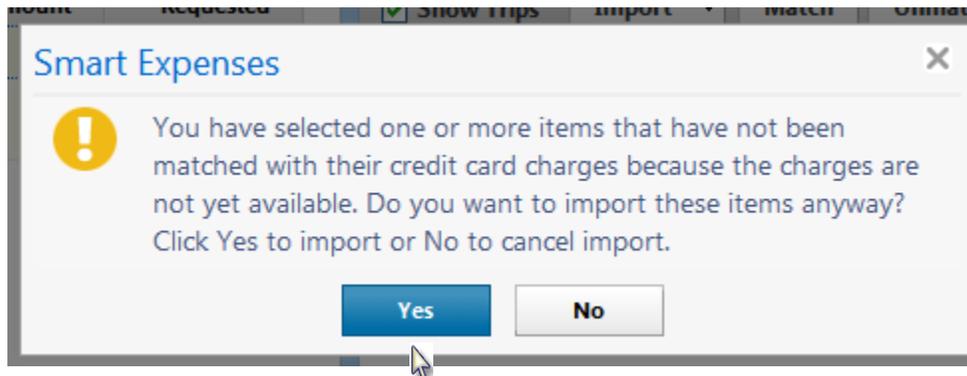
<input type="checkbox"/> Expense Detail	Expense	Source	Date	Amount
<input type="checkbox"/> US Airways Philadelphia, PA	Airfare	 	11/13/2014	\$482.20

- 2.) Click "Import" button.



<input type="checkbox"/> Expense Detail	Expense	Source	Date	Amount
<input checked="" type="checkbox"/> US Airways Philadelphia, PA	Airfare	 	11/13/2014	\$482.20

- 3.) A Pop-up Window will appear indicating a credit card charge is not matched, and there will never be an AMEX charge available to match. For Airfare and Airline Fees only, click "Yes" button.



Section: 17 Airfare and Airline Fees (Continued)

- 4.) Your Airline charge will appear in the expense report to be processed. Check the box beside the Airfare charge to begin processing. Note: Airfare and Airline Fees are the only expense types you will use the payment type "Company Paid".

The screenshot displays an expense management interface. On the left, a table lists expenses with columns for Date, Expense, Amount, and Requested. A single entry is shown for 11/13/2014, categorized as Airfare for U.S. Airways in Philadelphia, Pennsylvania, with an amount of \$482.20. A red error message states "Missing required field: Business Purpose." Below the table, summary statistics show a total amount and total requested of \$482.20. On the right, a detailed form for the selected expense is visible, including fields for Expense Type (Airfare), Transaction Date (11/13/2014), Business Purpose (empty), Ticket Number (77505754), Vendor (U.S. Airways), Airline Travel Service Code (Select one), City (Philadelphia, Pennsylvania), Payment Type (Company Paid), Amount (482.20 USD), and a Comment field. At the bottom right, buttons for Save, Itemize, Attach Receipt, and Cancel are present.

Date	Expense	Amount	Requested
11/13/2014	Airfare U.S. Airways, Philadelphia, Pennsy	\$482.20	\$482.20

TOTAL AMOUNT \$ 482.20 TOTAL REQUESTED \$ 482.20

Expense Type: Airfare
Transaction Date: 11/13/2014
Business Purpose: [Empty]
Ticket Number: 77505754
Vendor: U.S. Airways
Airline Travel Service Code: Select one
City: Philadelphia, Pennsylvania
Payment Type: Company Paid
Amount: 482.20 USD
Comment: [Empty]

Buttons: Save, Itemize, Attach Receipt, Cancel

Section 18: Personal Expenses Charged to Company AMEX Card

Our Reimbursable Business Expenses Policy, #2676, states that “Amex Corporate credit card use is restricted to Company business purposes only; the AMEX Corporate credit card is not for personal use”.

However, if you inadvertently use your Company AMEX card for a personal expense, you must use the Personal Expense category and will be billed directly, by LVB, for the expense.

Note: Expense types AMEX Rewards Points and Company Car Personal Trip > 300 are treated as personal expense and will be included on the LVB monthly statement (see next page for LVB Monthly Statements).

For Approvers:

If a portion of an AMEX transaction includes Personal Expense, you must send the expense report back to the employee with comments to itemize. The employee must itemize both the business expense portion (i.e. office supplies, cell phone, postage, etc.) and the personal expense portion for the AMEX transaction. Most expense types can be itemized.

Note: The AMEX transaction amount must not be adjusted by the approver, as this will affect the amount paid directly to AMEX by Concur.

The screenshot shows a 'New Expense' form with the following fields and values:

Field	Value
Expense Type	Office Supplies
Transaction Date	12/11/2014
Business Purpose	08. General Administration
Vendor Name	Staples
City	Raleigh, North Carolina
Payment Type	AMEX
Amount	62.00 USD
Comment	

Buttons at the bottom: Save, Itemize, Attach Receipt, Cancel.

Section 19: LVB Monthly Statement (Personal Expenses)

You will receive a statement if you have an expense report with any of the following expense types:

- Personal Expense,
- AMEX Rewards Points, and
- Company Car Personal Trip >300.

LVB will mail monthly statements at the end of each month. You will be billed monthly for all personal items and expected to pay the monthly statement balance in full.

To remit a check directly to:

Liggett Vector Brands
 Attn: Marsha Schneider
 PO Box 2010
 Morrisville, NC 27560

Explanation of areas on the LVB Monthly Statement

The monthly statement specifies the transaction date, expense report name and the expense type (category).



Liggett Vector Brands LLC

3800 Paramount Pkwy, Suite 250
 P. O. Box 2010
 Morrisville, NC 27560

JOHN DOE
 1234 MAIN STREET
 ATLANTA, GA 30308

PAGE 1 of 1

STATEMENT

Date
July 27, 2012
Account Number
DOE9999
Term
DUE UPON RECEIPT

PLEASE MAKE CHECK PAYABLE TO :
 LIGGETT VECTOR BRANDS

MAIL CHECK TO :
 LIGGETT VECTOR BRANDS
 ATTN : MARSHA SCHNEIDER
 P O BOX 2010
 MORRISVILLE, NC 27560

Reference	TranDate	Type	Expense Report Title*	Amount	Balance
1040483T	6/17/2012	Invoice	062812 JOE - AMEX REWARDS POINT (PERSONAL)	75.00	75.00
1042483T	6/20/2012	Invoice	062812 JOE - PERSONAL EXPENSE	12.89	12.89
1038483T	7/11/2012	Invoice	071512 JOE - PERSONAL USE OF CO CAR	23.82	23.82
	Transaction Date		Expense Report Expense Type (Category)		
				AMOUNT DUE	\$111.71

Current	1 to 30	31 to 60	61 to 90	Over 90
111.71	111.71	0.00	0.00	0.00

Section 20: Look up Previous Expense Reports

In Concur, you can view old expense reports referenced on an LVB Monthly Statement:

1. Click **Expense tab, Open Reports or Open Reports (My Tasks)**.

The screenshot displays the Concur user interface. At the top, there is a navigation bar with tabs for Home, Travel, Expense, Approvals, Reporting, and App Center. The Expense tab is highlighted. In the top right corner, there are links for Administration and Help, and a user profile icon.

Below the navigation bar is a dashboard area. On the left, it says "Liggett Vector Brands" and "Hello,". To the right, there are five metric cards: "Start a Report" (+), "Upload Receipts" (+), "Required Approvals" (00), "Available Expenses" (00), and "Open Reports" (00). A mouse cursor is pointing at the "Open Reports" card.

The main content area is divided into several sections:

- TRIP SEARCH:** A sidebar on the left containing search filters and options. It includes icons for airplane, car, hotel, and train. Below these are sections for "UNUSED TICKETS" (with explanatory text), trip type selection (Round Trip, One Way, Multi-Segment), departure and arrival city selection, departure and return time selection, and checkboxes for car services and hotel search. At the bottom, there is a "Class of Service" dropdown set to "Economy class" and a "Search flights by" section with radio buttons for Price and Schedule.
- Welcome back, Administrator:** A blue banner with a quote from a customer: "I like the consistency of the interface. I like how responsive and easy it is to find things." —Concur customer. A "Preview Settings" button is on the right.
- COMPANY NOTES:** A section with a "Quick Start Guide" link and a "Concur Travel & Expense" link. A "Read more" button is at the bottom right.
- MY TASKS:** Three cards showing task counts and descriptions:
 - Required Approvals:** 00. Description: "Great! You currently have no approvals."
 - Available Expenses:** 00. Description: "You currently have no available expenses."
 - Open Reports:** 00. Description: "You currently have no active reports." A mouse cursor is pointing at this card.
- MY TRIPS (0):** A section with a right-pointing arrow and a message: "You currently have no upcoming trips."

Section 20: Look up Previous Expense Reports (Continued)

2. Click **Report Library**.

The screenshot shows the CONCUR Expense interface. The top navigation bar includes 'CONCUR', 'Travel', 'Expense' (selected), 'Approvals', 'Reporting', and 'App Center'. On the right, there are links for 'Administration', 'Help', 'Profile', and a user icon. Below the navigation, there are tabs for 'Manage Expenses' and 'Process Reports'. The main content area is titled 'Active Reports' and contains a large dashed red box with a red plus sign and the text 'Create New Report'. To the right of this box, it says 'There are no Active Expense Reports. Click **Create New Report** to create a new report.' A blue link labeled 'Report Library' with a right-pointing arrow is located in the top right corner of the main content area.

3. Click **View** tab and in the dropdown box, click **All Reports**.

The screenshot shows the CONCUR Expense interface with the 'All Reports' page. The top navigation bar is the same as in the previous screenshot. Below the navigation, there are tabs for 'Manage Expenses' and 'Process Reports'. The main content area is titled 'All Reports' and includes a 'View' dropdown menu, 'Create New Report', and 'Import' buttons. The 'View' dropdown menu is open, showing a list of report categories: 'Unsubmitted Reports', 'Active Reports', 'Recent Reports', 'Pending Reports', 'Approved Reports', 'Processed Reports', 'Paid Reports', 'Payment Confirmed Reports', 'All Reports' (selected), 'Reports for this Month', 'Reports for last Month', 'Reports for this Quarter', 'Reports for last Quarter', 'Reports for this Year', and 'Reports for last Year'. Below the dropdown, there is a table with columns: 'Comments', 'Status', 'Payment Status', 'Report Date', 'Total', and 'Requested A.'. The table contains several rows of report data.

Comments	Status	Payment Status	Report Date	Total	Requested A.
	Approved	Payment Confirmed	09/04/2013	\$42.10	\$42.10
	Approved	Payment Confirmed	08/01/2013	\$6.94	\$6.94
uke Inn	Approved	Payment Confirmed	05/08/2012	\$21.09	\$21.09
	Approved	Payment Confirmed	09/26/2011	\$34.41	\$34.41
	Approved	Payment Confirmed	08/10/2011	\$65.00	\$65.00
	Approved	Payment Confirmed	07/29/2011	\$10.00	\$10.00
	Approved	Payment Confirmed	06/23/2011	\$31.62	\$31.62
g Set Up	Approved	Payment Confirmed	11/29/2010	\$47.50	\$47.50
is. Miles o travel off site to run test on v...	Approved	Payment Confirmed	11/18/2010	\$38.00	\$38.00

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