Concur Training

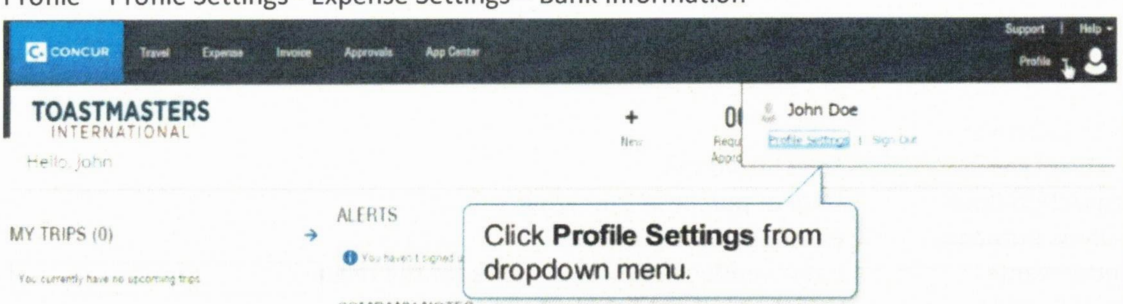
Login website: www.concursolutions.com

User name: 8 digit TM member number@toastmasters.org

Password: welcome

1. Set up bank information (takes up to 4 days to confirm account)

Profile – Profile Settings - Expense Settings – Bank Information

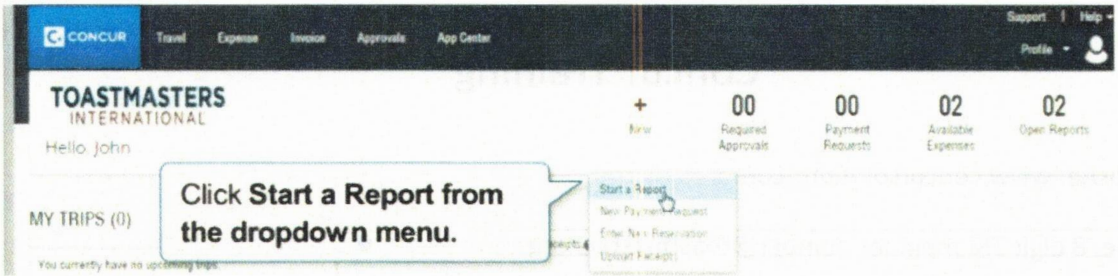


Enter bank info; Active (yes)

If you elect not to choose the expense pay option, this will add weeks to your reimbursement date as there will be longer processing time. You will also need to contact World Headquarters to update your profile to get reimbursed by check. For additional support, contact expensereport@toastmasters.org.

2. Create a New Expense Report (Out of Pocket Expenses)

Quick Task Bar - +Start a Report



a. Report Name:

Format: OOP-D84-Name-Event-MonthYear

Example: OOP-D84-KKubo-DEC-Oct2020

b. New Expense:

1. Expense Type	Select from List
2. Transaction Date	Date of purchase / meeting
3. Business Purpose	Enter business purpose
4. Vendor Name	Enter vendor name (Your name for the mileage)
5. City of Purchase	Select city. If not listed, choose closest city.
6. Payment Type	Select Cash/Out of Pocket
7. Amount	Enter amount of transaction
8. Reporting Code	Select code that best relates to expense
9. Event Period	Select event code, if applicable or N/A
10. District	This should be auto-populated
11. Subsidiary	Defaults to District
12. Comment	Enter any additional info that you would like approver to view

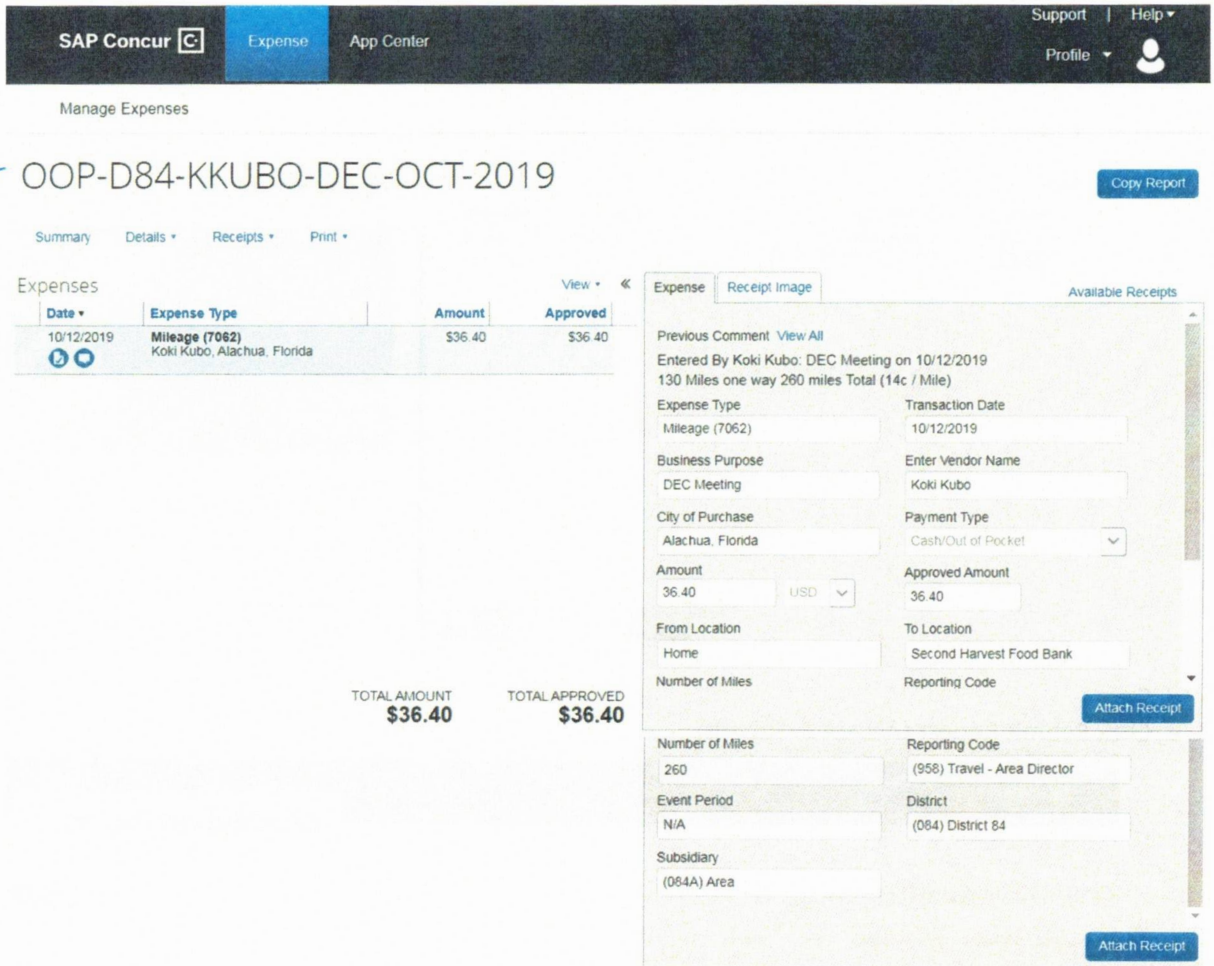
Example (Mileage)

** It must be more than 30miles (One way) to qualify for the reimbursement.

$0.14 / Mileage: Regardless of numbers of passengers on board

Assistant Area directors do not qualify for the reimbursement. (They don't have TI Concur account.)

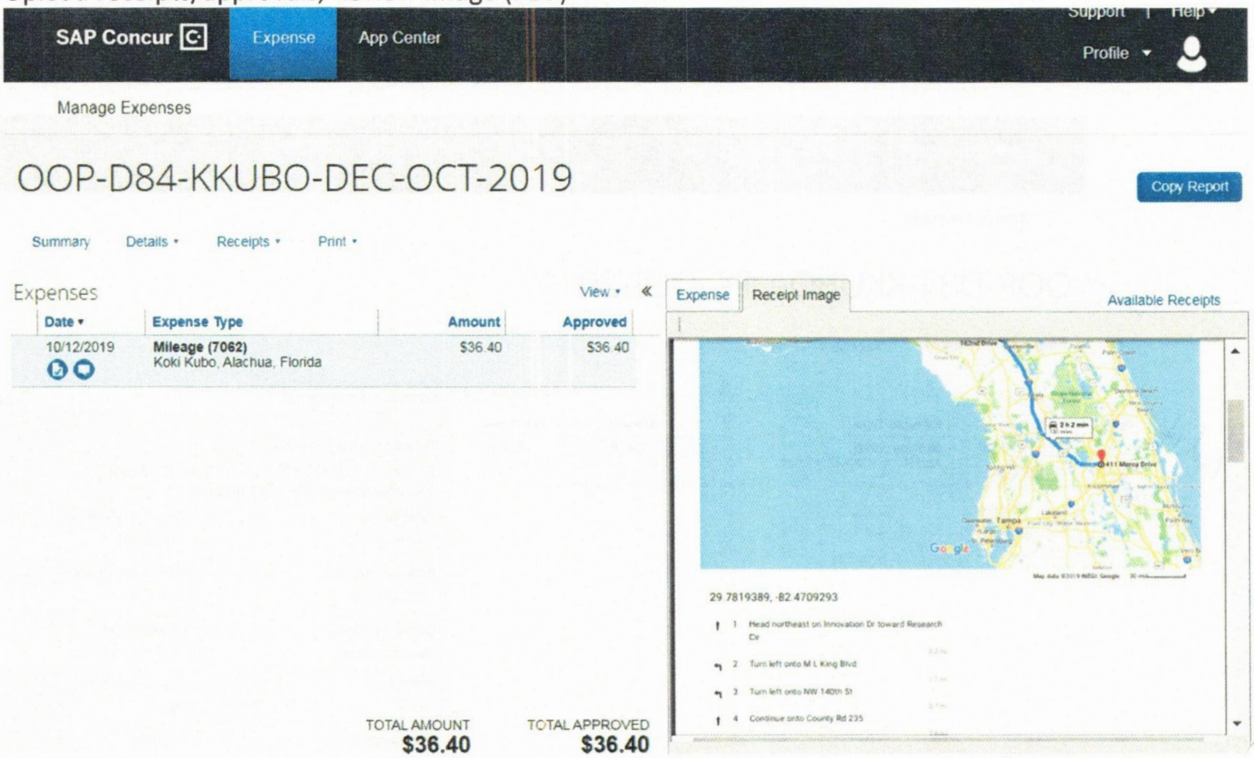
Out of Pocket



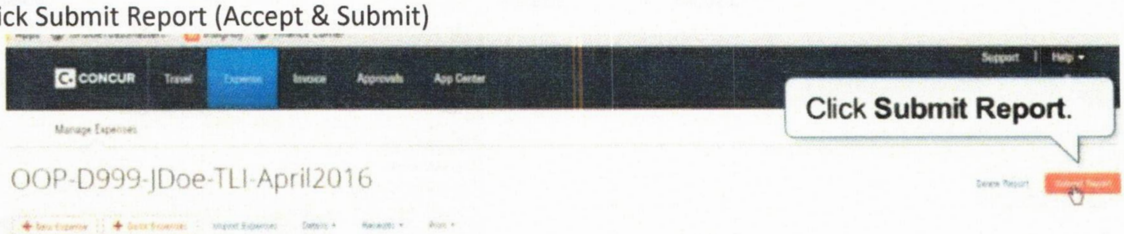
Example: 130 Miles (One way) x 2 = 260 miles

x $0.14/Mile = $36.40

c. Attach Receipt
Upload receipts/approvals, Review Image (PDF)

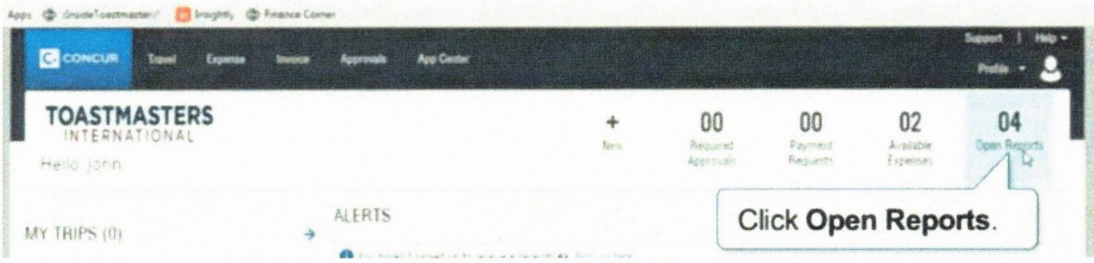


d. Save
e. Click Submit Report (Accept & Submit)

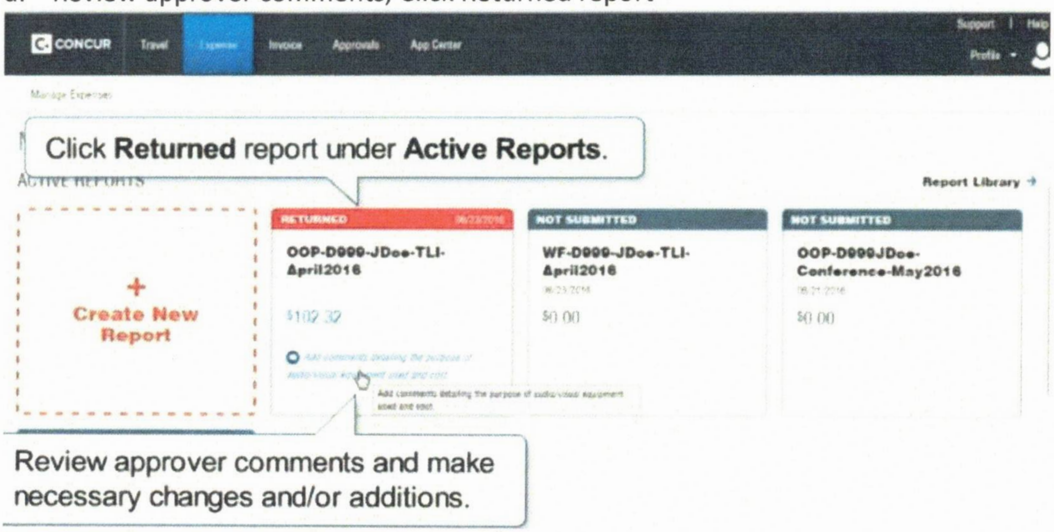


3. Correcting an Expense Report

Quick task bar – Open Reports



a. Review approver comments, Click Returned report



b. Make changes

c. Click Save; Click Submit Report