

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

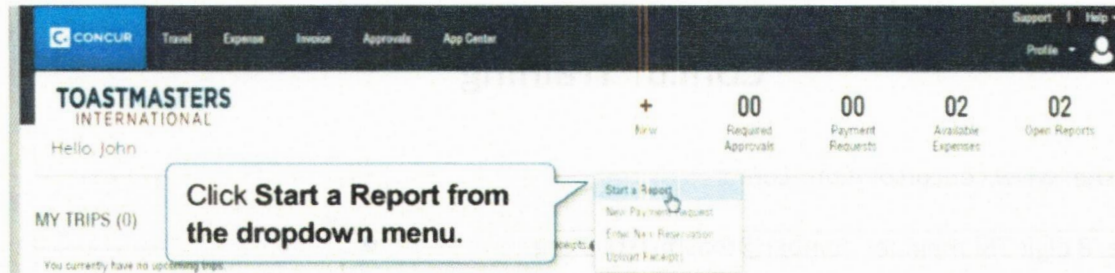


Enter bank info; Active (yes)

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.)

SAP Concur ExpenseApp CenterSupport | Help▼Profile▼

Manage Expenses

OOP-D84-KKUBO-DEC-OCT-2019

Copy Report

SummaryDetailsReceiptsPrint

Expenses

Date	Expense Type	Amount	Approved
10/12/2019	Mileage (7062) Koki Kubo, Alachua, Florida	\$36.40	\$36.40

Out of Pocket

TOTAL AMOUNT
\$36.40

TOTAL APPROVED
\$36.40

ExpenseReceipt ImageAvailable Receipts

Previous CommentView All

Entered By Koki Kubo: DEC Meeting on 10/12/2019
130 Miles one way 260 miles Total (14c / Mile)

Expense Type
Mileage (7062)

Transaction Date
10/12/2019

Business Purpose
DEC Meeting

Enter Vendor Name
Koki Kubo

City of Purchase
Alachua, Florida

Payment Type
Cash/Out of Pocket

Amount
36.40 USD

Approved Amount
36.40

From Location
Home

To Location
Second Harvest Food Bank

Number of Miles

Reporting Code

Attach Receipt

Number of Miles
260

Reporting Code
(958) Travel - Area Director

Event Period
N/A

District
(064) District 84

Subsidiary
(064A) Area

Attach Receipt

Example: 130 Miles (One way) x 2 = 260 miles
x \$0.14/Mile = \$36.40

Page 3 of 5

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

SAP Concur Expense App Center Support Help Profile

Manage Expenses

OOP-D84-KKUBO-DEC-OCT-2019 [Copy Report](#)

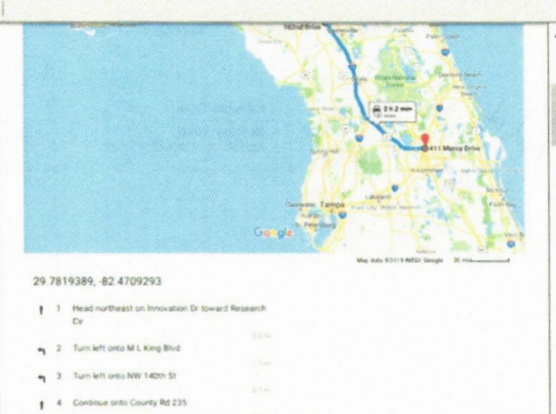
Summary Details Receipts Print

Expenses

Date	Expense Type	Amount	Approved
10/12/2019	Mileage (7062) Koki Kubo, Alachua, Florida	\$36.40	\$36.40

TOTAL AMOUNT **\$36.40** TOTAL APPROVED **\$36.40**

Expense Receipt Image Available Receipts



29 7819389, -82 4709293

- 1 Head northeast on Innovation Dr toward Research Dr
- 2 Turn left onto M L King Blvd
- 3 Turn left onto NW 140th St
- 4 Continue onto County Rd 235

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

CONCUR Travel Expense Invoice Approvals App Center Support Help

Manage Expenses

OOP-D999-JDoe-TLI-April2016

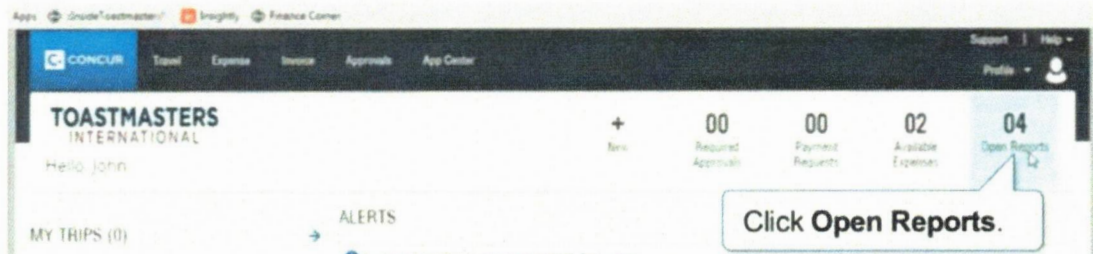
[New Expense](#) [Quick Reimburse](#) [Import Expenses](#) [Details](#) [Receipts](#) [Print](#)

Click Submit Report.

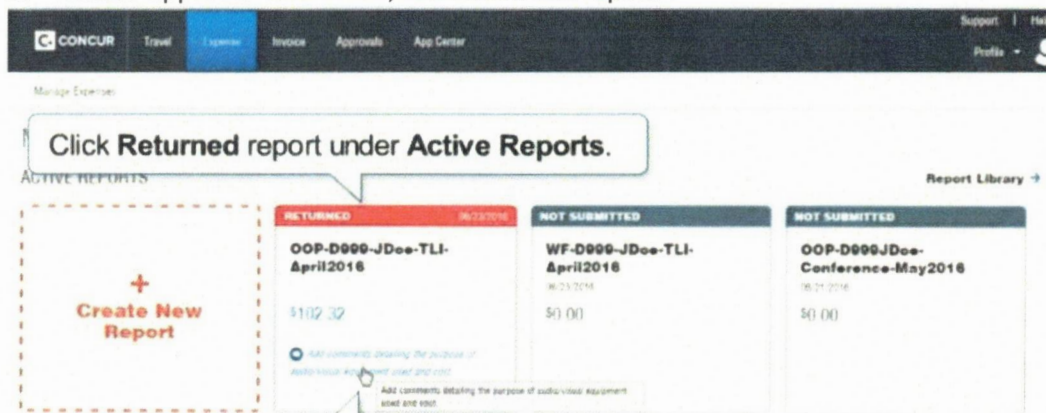
[Review Report](#) [Submit Report](#)

3. Correcting an Expense Report

Quick task bar – Open Reports



- a. Review approver comments, Click Returned report



Review approver comments and make necessary changes and/or additions.

- b. Make changes
c. Click Save; Click Submit Report

