Accessing the Concur Mobile App

There are several ways your phone can assist you in logging expenses. Two of the most useful apps are the Concur Mobile and ExpenseIt apps.

Additional guides for all mobile devices are provided by Concur at http://www.concurtraining.com/customers/concur/mobile.

**Mobile Setup** – In order to use the Concur mobile application, you will need the Concur Company Code to enable Single Sign-On with your mobile device. The Mazda company code is **V7K6HV**. In order to log in to ExpenseIt, you will need to set a Mobile PIN.

**Downloading the Mobile Apps** - You can download various applications via your mobile app store. Concur Mobile is available on the Apple App Store, Google Play Store, Blackberry App World, and Windows Store. ExpenseIt is available on all platforms except the Windows Store.

**Logging In to Concur Mobile** - Once you download the application, click the **SSO Company Code Sign In** link and enter the code. You will then be prompted to login using your Mazda credentials.

**Logging In to ExpenseIt** - Once you download the application, you can use your MNAO email and Mobile PIN (created above) to login to ExpenseIt.
QUICK REFERENCE GUIDE – MOBILE APPLICATIONS

Concur Mobile Overview
The Concur Mobile app allows you to create expense reports, add receipts, and submit reports on the go. Note: all screenshots for this guide pertain to the iPhone versions of the apps.

Additional guides for all mobile devices is provided by Concur at http://www.concurtraining.com/customers/concur/mobile.

Mobile Overview

- **Trips** – view any trips booked through Concur Travel
- **Expense Reports** – view all Expense Reports. The icon shows all outstanding expense reports for the period
- **Book** – search for flights, hotels, and car rentals

Create a New Report

1. Select Expense Reports.

2. The Reports screen shows all unsubmitted and submitted reports. Click the + symbol in the top right hand corner to create a new report.

3. Enter the required Report Header information. When you are done, click Save.

Add an Expense Entry to a Report – Manual

While in an Expense Report, you can choose to create a new Expense manually, import Smart Expenses, or Import and Match to credit card transactions

1. To add a manual expense to a report, click the + symbol.

2. Click Add New Expense.

3. Click the correct Expense Type.

4. Enter in the required fields, indicated with red text and a *.
QUICK REFERENCE GUIDE – MOBILE APPLICATIONS

Concur Mobile Overview (continued)
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Add an Expense Entry to a Report – Smart Expenses
Smart Expenses are expenses generated by using your corporate card, booking travel within Concur, and/or using ExpenseIt; many of the required fields are automatically populated for Smart Expenses.

1. To add a smart expense to a report, click the + symbol.
2. Select Import Expense.
3a. Select Add to Report and choose which expenses you would like to add to report.
3b. Select Add to Report once all desired expenses have been selected.
4. Select the report you want to add the expenses to or click the + symbol to add the expenses to a New Report.

Attach a Receipt to an Expense
If you used ExpenseIt, the receipt is already attached; please see next slide for more details on ExpenseIt.

1. Within the expense entry, click Add Receipt to reveal options for attaching a receipt.
2a. Select Attach via Camera to take a picture of a receipt.
2b. Select Attach via Photo Album to attach a previously taken receipt picture from your mobile device’s Photo Album.

Note: The Receipt Store allows users to keep a repository of receipts on Concur. It is recommended that users instead attach receipts via the Camera / Photo Album or use ExpenseIt.

Note: It is recommended to upload receipts via the ExpenseIt app instead of the Concur Mobile app in order to automatically populate expense details. Remember to review and verify your receipts and expense detail for correctness after uploading.
Concur Mobile - Approvals

If you are an authorized approver for expense reports, you can also use the Concur Mobile application to approve reports on your smartphone.

*Note: all screenshots for this guide pertain to the iPhone versions of the apps.*

Additional guides for all mobile devices is provided by Concur at [http://www.concurtraining.com/customers/concur/mobile](http://www.concurtraining.com/customers/concur/mobile).

1. Login to Concur and click the **Approvals** button. This will also show you a count of any outstanding expense reports awaiting your approval.

2. This screen shows any outstanding approvals (either for travel or for expenses). Select a report or trip awaiting your approval to view its details.

3. While in an expense report, you can click on a specific expense to view its details and receipts. Once you have reviewed, you can click **Approve** to approve and send to processing, or **Send Back** in order to return the report to the employee.

4. If you decide to send the report back to the employee, you will be prompted to provide a comment/reason as to why you are sending it back.

*Please consult the Approver Step-by-Step Guide for more information on approving expense reports.*
QUICK REFERENCE GUIDE – MOBILE APPLICATIONS

Expenselt

Using Expenselt automatically creates Smart Expenses by populating required fields and attaching the receipt image. Expenselt also automatically itemizes hotel bills for you. You can match Smart Expenses generated through Expenselt with corporate card transactions for seamless expense creation.

1. Select the blue camera icon to launch your mobile device’s camera.

2a. Select the blue camera icon to take a picture of the receipt.

2b. Select the icon in the bottom left corner to add a receipt already in your mobile device’s photo album.

3. Once a receipt is analyzed, click the Export button on the individual expense to export the expense to Concur. To export all analyzed receipts, click the Export All button in the bottom right hand corner.

Note: – To enable automatic uploads to Concur, click the top left corner to go to Settings and select Automatically export expenses to Concur. You can also select when you would like to receive email or push notifications.

You can also email receipts to receipts@expenseit.com instead of using the Expenselt mobile application (e.g., hotel bills that are emailed to you). This is the same as using the Expenselt mobile app.
Connected Applications

Some apps can be linked to your Concur profile. You may find a list of these Connected Apps in the App Center (located on the Concur Homepage). Below are a list of some of the different apps you may voluntarily connect to Concur based on your preferences:

**Starbucks** – You can connect your Starbucks app to Concur which generates e-receipts based on purchases with the app. These appear in your Smart Expenses with the receipts attached.

**Uber** – Connecting with the Uber app also generates e-receipts that flow into your Smart Expenses. After setting up the connection, you can turn this functionality on and off at any time within the Uber app.

**TripIt** – The TripIt app allows you to easily monitor the itinerary of your trip booked through Concur Travel including directions, flight times, and other details.

You can access the App Center via the menu bar from the Concur Homepage.

Within the App Center, click the Learn More button for details of how the app connects to Concur, as well as instructions for connecting the app.

**Popular Connected Applications**

Note: Each of these Connected Applications has the functionality to “turn on / off” the forward to Concur functionality, making it easy to switch between personal and business usage of the apps.
For TripIt can we say both travel booked through Concur and personal travel? And maybe move it to the most right so we have the two important ones first.

Jacquelyn Kimmel, 8/31/2015