

Section 8: Create a New Expense Report (Continued)

Step 4: Add an Out-of-Pocket Expense to the New Expense Report

How to...

1. Click **New Expense**.

On the **New Expense** tab, select the appropriate expense type.

Additional Information

The **New Expense** tab appears.

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

The screenshot shows the Concur web interface for creating a new expense report. The user is logged in as 'Sales Training'. The 'New Expense' tab is active, and the 'Expense Type' is set to 'Incidentals'. The form includes fields for 'Transaction Date', 'Business Purpose', 'Vendor Name', 'City', 'Payment Type' (set to 'Out of Pocket'), 'Amount' (set to USD), and a 'Comment' field. There is a checkbox for 'Personal Expense (do not reimburse)'. At the bottom, there are buttons for 'Save', 'Itemize', 'Allocate', 'Attach Receipt', and 'Cancel'. A summary table at the bottom left shows 'TOTAL AMOUNT' and 'TOTAL REQUESTED' both as '\$0.00'.

Expense Type	Transaction Date
Incidentals	

Business Purpose	Vendor Name

City	Payment Type
	Out of Pocket

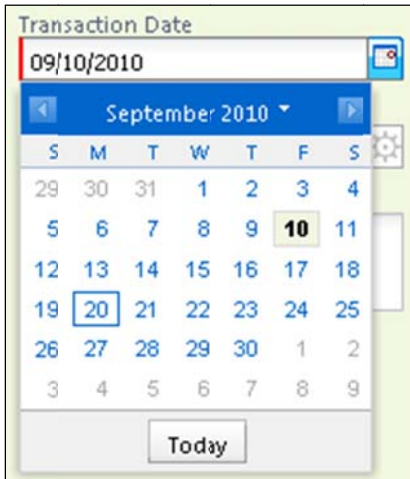
Amount	Personal Expense (do not reimburse)
	<input type="checkbox"/>

Comment

TOTAL AMOUNT	TOTAL REQUESTED
\$0.00	\$0.00

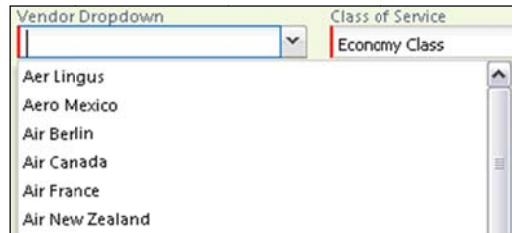
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For date fields, use the calendar to select the date of the expense.



The screenshot shows a calendar widget titled "Transaction Date". The date "09/10/2010" is entered in the text field above the calendar. The calendar displays the month of September 2010, with the 10th of the month highlighted in yellow. A "Today" button is located at the bottom of the calendar.

For lists, select from the list.



The screenshot shows a dropdown menu titled "Vendor Dropdown". The menu is open, displaying a list of vendors: Aer Lingus, Aero Mexico, Air Berlin, Air Canada, Air France, and Air New Zealand. The "Class of Service" field is set to "Economy Class".

For auto-complete fields, type the first portion of your choice and then select from the list.



The screenshot shows an auto-complete field titled "City". The text "Redmond, Washington" is entered in the text field. A dropdown list is open, showing suggestions: "Redmond, Washington", "REDMOND, AUSTRALIA", "REDMOND WEST, AUSTRALIA", and "Redmond-Bend apt, Oregon". A "All Countries" dropdown is visible at the bottom of the list.

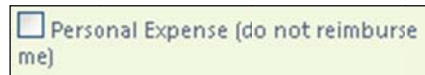
Complete other text fields and checkboxes as usual.



The screenshot shows a text field labeled "Comment".



The screenshot shows a text field labeled "Business Purpose".



The screenshot shows a checkbox labeled "Personal Expense (do not reimburse me)". The checkbox is currently unchecked.

How to...

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.

Click **Save**.

Additional Information

For different types of expenses, such as hotel or car mileage, or for expenses incurred in a currency other than your reimbursement currency, refer to *Using Special Features* in this guide.

The expense appears on the left side of the page.