

## Section 10: Use Special Features (Continued)

### Itemize Expenses

You itemize expenses 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.

Click **Itemize**.

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.

The screenshot displays the Concur Expense Report interface. At the top, there are navigation tabs for 'My Concur', 'Travel', 'Expense', and 'Profile'. Below these are links for 'View Charges', 'View Reports', 'New Expense Report', 'View Receipt Store', and 'Approve Reports'. The main header area shows 'Sales Training' with buttons for 'Delete Report' and 'Submit Report'. A secondary header contains 'New Expense', 'Quick Expenses', 'Import', 'Details', 'Receipts', and 'Print / Email'. The 'Expenses' section features a table with columns for 'Date', 'Expense', 'Amount', and 'Requested'. Two expenses are listed: a hotel stay for \$745.00 and a business meal for \$150.00. A 'New Expense' form is open on the right, showing fields for 'Expense Type' (Office Supplies), 'Transaction Date' (04/18/2013), 'Business Purpose', 'Vendor Name', 'City' (Minneapolis, Minnesota), 'Payment Type' (Out of Pocket), and 'Amount' (50 USD). A 'Personal Expense' checkbox is also present. At the bottom of the expense list, 'TOTAL AMOUNT' and 'TOTAL REQUESTED' are both \$895.00. The 'New Expense' form has buttons for 'Save', 'Itemize', 'Allocate', 'Attach Receipt', and 'Cancel'.

Date	Expense	Amount	Requested
04/18/2013	Hotel Astron Hotels, Minneapolis, Minnesota	\$745.00	\$745.00
04/18/2013	Business Meal (attendees) Morton's, Minneapolis, Minnesota	\$150.00	\$150.00

TOTAL AMOUNT: \$895.00  
TOTAL REQUESTED: \$895.00

2. Complete all required and optional fields as directed by your company.

## ***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.