QuickStart Guide

Concur® Premier: Using Receipt Store

Proprietary Statement

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Concur® Premier: Using Receipt Store QuickStart Guide

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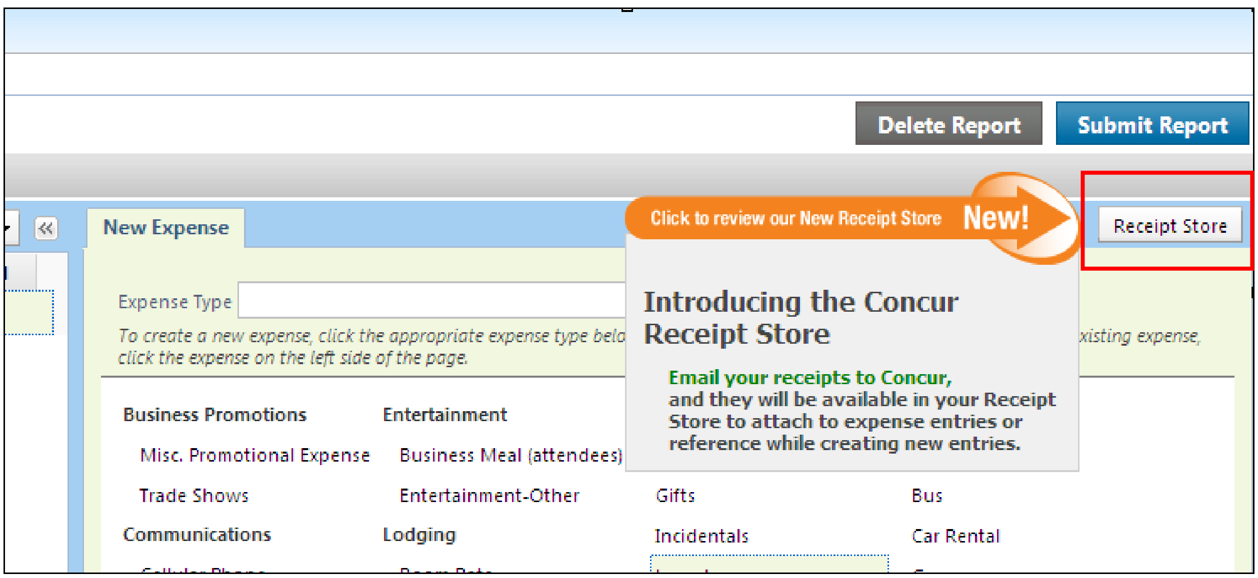
Using Receipt Store

The Receipt Store feature allows you to associate receipt images with specific expense entries. It also allows managers and processors to easily reconcile the expense report receipts at the expense level.

The ability to drag or upload receipt images in Receipt Store is turned on by default. However, you must verify your email address to activate the option to email receipt images to Concur.

Section 1: Verify Email Addresses

How to...	Additional Information
1. Click the **Receipt Store** button to begin the email verification process.	



Section 1: Verify Email Addresses (continued)

How to...

2. On the **Get Verified** tab, enter each email address, and then click **Submit** for each.

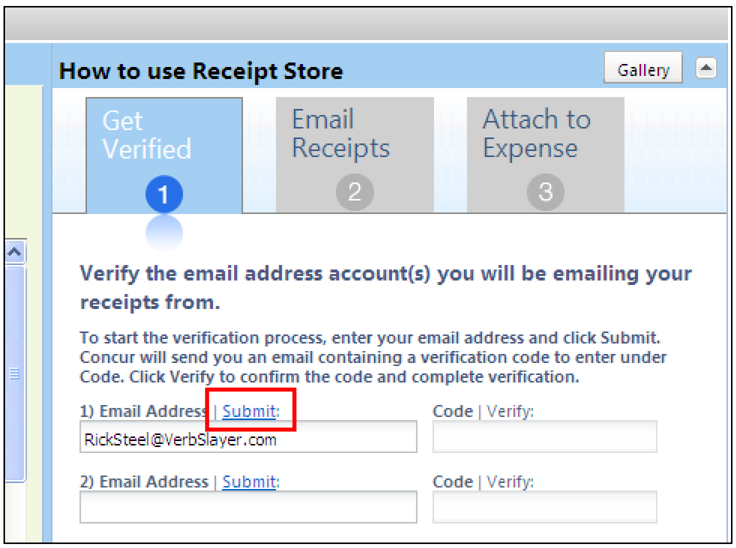
Additional Information

You can have up to three email addresses linked to the Receipt Store. Each email address must be unique and you cannot use a shared email alias for this.

After you click **Submit**, Concur will send a unique verification code to your e-mail address.

Delegate Considerations:

An email address can be registered only *once* with Receipt Store - you must decide if a delegate's email address should be linked to your account, or retained for the delegate's own receipt image account.



3. Copy and paste the verification code from the e-mail to the **Code** box, and then click **Verify**.

Once the email addresses are verified, you can send receipt images to the Receipt Store at **myinbox@concursolutions.com**.

Section 2: Drag and Drop Receipts from the Receipt Store

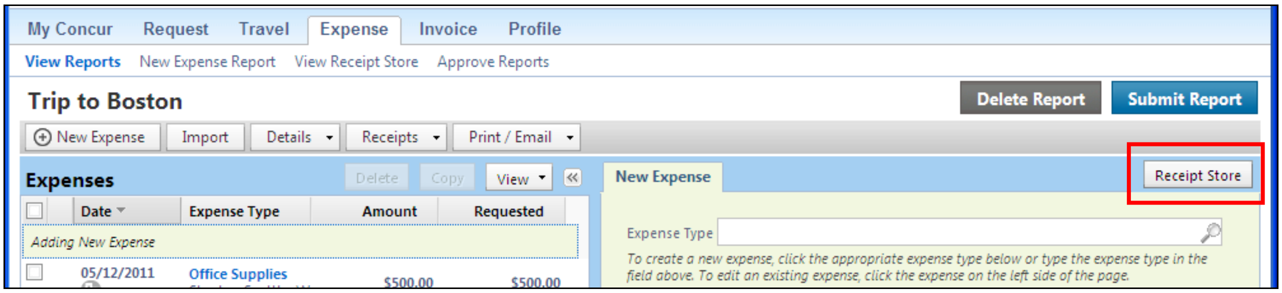
Using Receipt Store, you can easily drag and drop receipts to attach them to specific expenses.

How to...

1. With your expense report open, click **Receipt Store**.

Additional Information

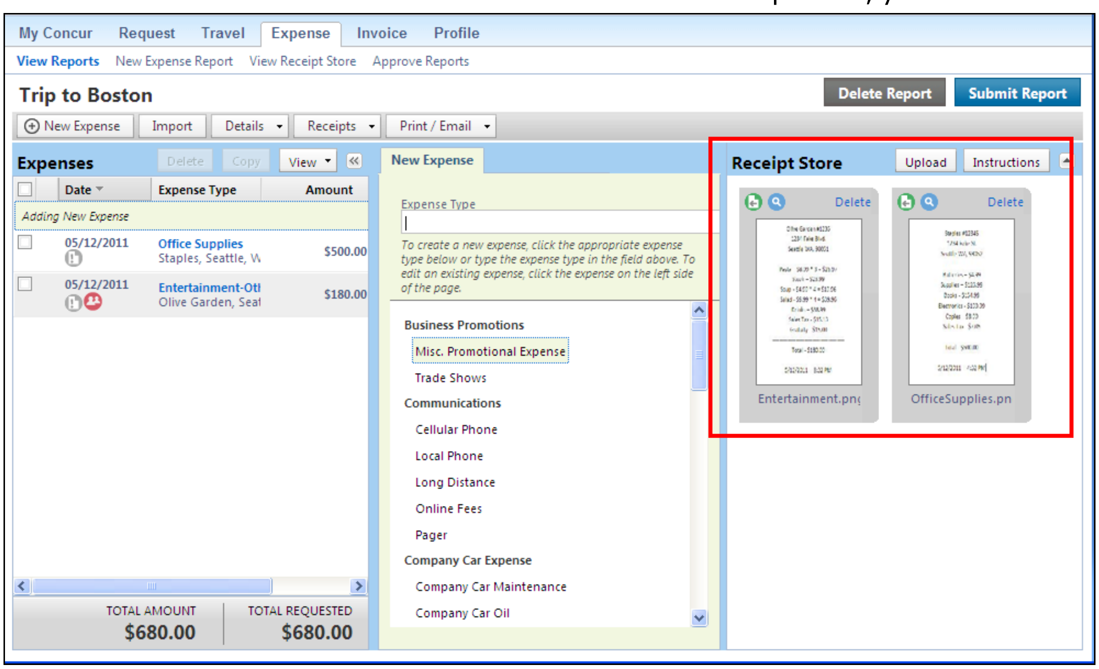
The Receipt Store is hidden by default.



2. In the **Receipt Store** pane, you can view any previously emailed or uploaded receipts.

You can add additional receipts to the Receipt Store by clicking **Upload**, or emailing the receipt images to myinbox@concursolutions.com.

If you want to delete a specific receipt from the Receipt Store, you can click **Delete** for that receipt.



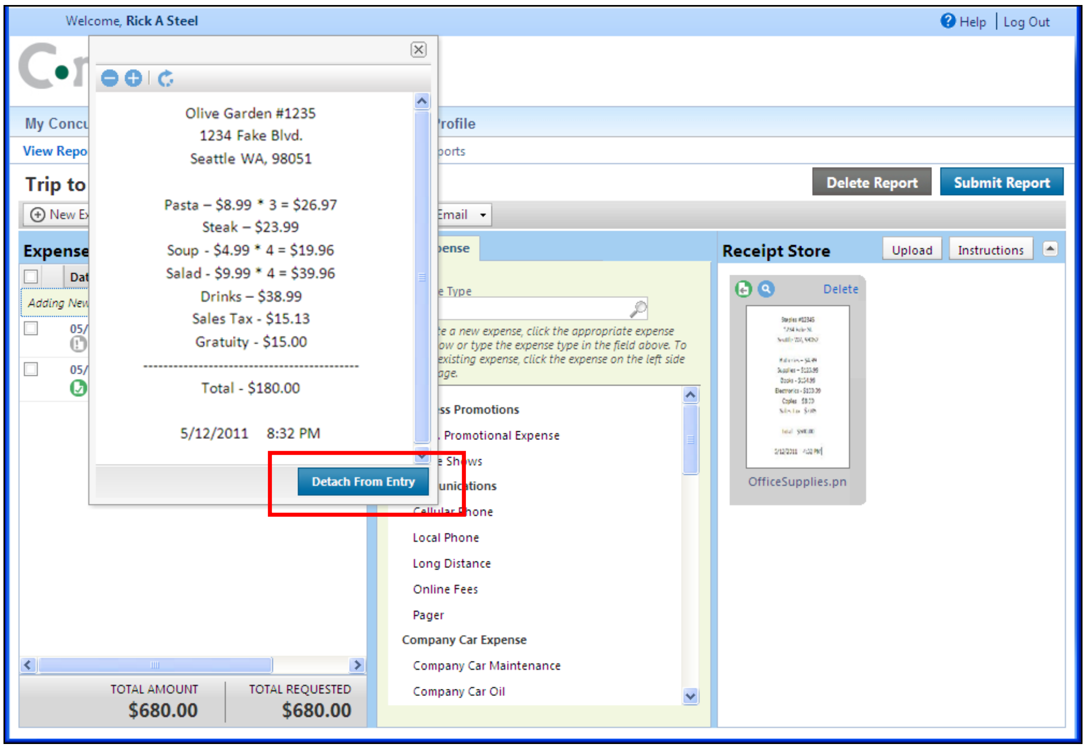
3. Click on a receipt image to view details of the receipt.

You can rotate an opened image for easier viewing. Click **Save** to save the changes.

4. Expense entries that require a receipt will display the **Receipt Required** icon.

Section 2: Drag and Drop Receipts from the Receipt Store (continued)

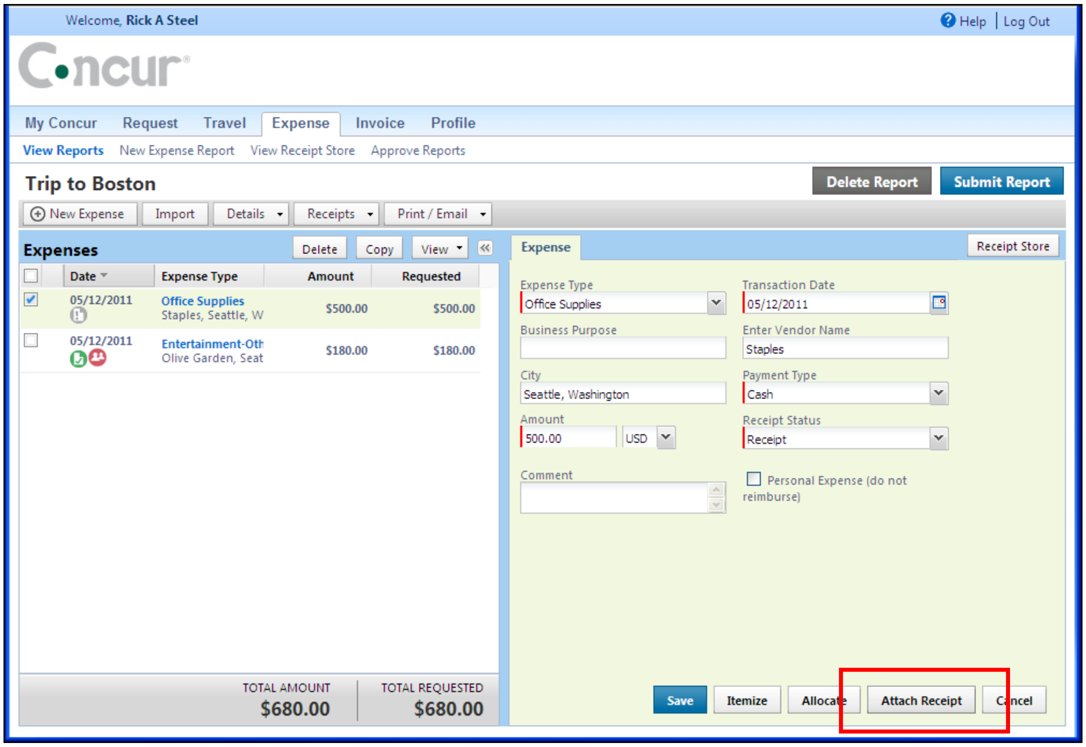
How to…	Additional Information
5. To attach a receipt to an expense entry, click the receipt in the **Receipt store**, and then drag and drop onto the appropriate expense entry.	When you attach the receipt to the expense, the icon changes to the **Receipt Received** icon. 
6. To view the attached receipt, click the **Receipt Received** icon.	Click **Detach From Entry** to remove this receipt from the expense.



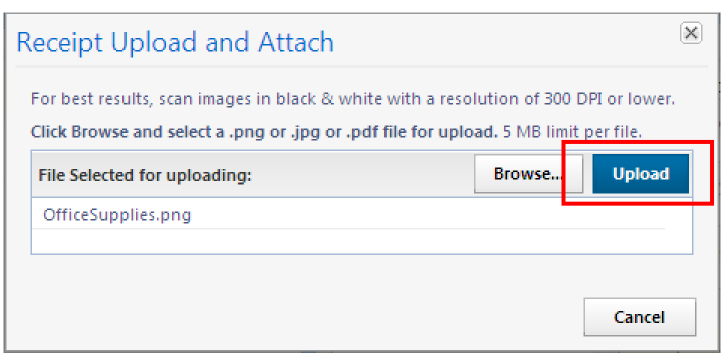
Section 3: Upload Receipt Images

Using the Receipt Store, you can add receipts to line item expenses. Please note that you still have the ability to use the **Receipts** button to add report level receipts.

How to...	Additional Information
1. Click an expense item to open it.	



How to...	Additional Information
2. Click **Attach Receipt**.	The **Receipt Upload and Attach** dialog box opens.
3. Click **Browse**.	
4. Select the file to upload, and then click **Open**.	You can upload images that are up to 5 MB in size and they can be PNG, JPG, or PDF files.



How to...	Additional Information
5. Click **Upload**.	Once uploaded, the receipt icon associated with the expense changes to the **Receipt Received** icon.

Section 3: Uploading Receipt Images (continued)

How to…	Additional Information
6. To view the attached receipt, click on the **Receipt Received** icon.	You can rotate an opened image for easier viewing. Click **Save** to save the changes. Click **Detach From Entry** to remove this receipt from the expense.