Use Concur on your iPhone to assist with your Expense and Travel needs.

Using your smartphone, you can access your information in a cab, in a meeting, at the restaurant – where your laptop is not available or is too cumbersome.

Among other things – you can enter out-of-pocket expenses real-time and take a picture of the associated receipt; create, submit, and check the status of your expense reports; and finish your expense report approvals. You can check your itinerary; book a flight, taxi, rental car, train, or hotel; and view maps and directions from your current location.

ABOUT THIS GUIDE
This guide provides instructions for users to register, set up, and get started with Concur's mobile app.
## Overview

### Feature List

#### If you use Travel, you can use your mobile device to:

- View your itinerary
- Search for and book:
  - Flight
  - Hotel
  - Rental car
  - Amtrak
- Check your flight status using FlightTrack
- Check airport services/features with GateGuru
- Access Taxi Magic (available to US clients)
- Access MetrO (ground transportation)
- Map locations, obtain driving directions, view vendor details
- Use Locate & Alert (if your company uses Concur's Locate & Alert service)

#### If you use Expense, you can use your mobile device to:

- Add, edit, and delete out-of-pocket expenses
- Capture and upload receipt images
- View and edit downloaded card transactions
- Add attendees and itemizations to expenses
- Attach expenses to an expense report
- Create, view, edit, delete, and submit expense reports
- Approve or reject expense reports (for report approvers)
- Access Taxi Magic (available to US clients)
- Use Locate & Alert (if your company uses Concur's Locate & Alert service)

#### If you use Invoice, you can use your mobile device to:

- Approve payment requests (for request approvers)
- Use Locate & Alert (if your company uses Concur's Locate & Alert service)

### User Roles and Permissions

Users with the Travel User role can access the Travel-related features.

Users with the Expense User role can access the Expense-related features.

Users with the Invoice approver role can approve payment requests.

### Registration

If you have any of the roles listed above, then **Mobile Registration** appears on the **Profile** menu in the web version of Concur.

1) Create your mobile PIN.

2) To obtain the app, go to the App Store - Use these search terms: Concur, Concur Mobile, Cliqbook, travel, expense, hotel, taxi, receipt, hotel booking, business travel, expense report
Logon

Once you have downloaded the Concur app, locate the Concur icon on your application menu.

Start the application and log in with your mobile PIN. The Concur home screen appears. It provides your main menu, shows your Travel and Expense options, and more.

Trips

View Itineraries

To view information about your trips, select Trips on the home screen.

Select the desired trip. Then, select the trip segments to see the details.
**Flight Information**

Access additional information from the flight screen.
Book a Flight

Book a flight by selecting Book Travel on the home screen and then Book Air.

1) Enter the departure and arrival locations along with the other search criteria.
2) Select Search.

The search results are displayed by the number of stops and then carrier.

3) Select the desired carrier.

4) Select the desired flight.

If you have one or more frequent flyer programs, they appear on this screen so you can choose.

5) Select Reserve.

Select ON for Refundable Only so only refundable flights appear in the search results.

Change the sort order.
Book a Rental Car

To search for and book rental cars:

- On the home screen, select **Book Travel** and then **Book Car**

- From an itinerary, select **+** (at the top of the itinerary screen) to access the menu and then select **Book Car**

**NOTE:** If you add a car from the itinerary, the airport and pick-up/drop-off dates are pre-populated.

1) Enter the pick-up and drop-off locations along with the other search criteria.

2) Select **Search**.

3) Select a car.

4) Select **Reserve**.

Note about credit cards:
*Ghost cards* are special credit cards used by some companies. *Ghost cards cannot* be used with Concur's mobile app.
Book a Hotel

To search for and book hotel:

- On the home screen, select Book Travel and then Book Hotel – or –
- From an itinerary, select + (at the top of the itinerary screen) to access the menu and then select Book Hotel

**NOTE:** If you add a hotel from the itinerary, the airport and check-in/check-out dates are pre-populated.

1) Enter the search criteria.
2) Select Search.
3) Review the map.
4) Select a hotel.
5) Review the cancellation policy.
6) Select a room.
7) Select Reserve.

**Note about credit cards:**
Ghost cards are special credit cards used by some companies. Ghost cards *cannot* be used with Concur’s mobile app.
MORE INFORMATION ABOUT HOTELS

On the Select Hotel screen...

On the reservation screen...

The prices that appear in the mobile app on the hotel page are the same as the web version of Concur:
- Green = the price is in-policy and can be selected.
- Yellow = your manager will be notified.
- Red = your manager must approve the trip.
- Gray (unavailable) = the price is out-of-policy and cannot be booked (such as room requiring deposit).

Select to change the sort order.

You can cancel the hotel, if necessary.
**Book Amtrak Direct Connect**

Book rail by selecting **Book Travel** on the home screen and then **Book Rail** – if your company is configured to use Amtrak Direct Connect.

1) Enter the search criteria.
2) Select **Search**.

3) Select a train.

4) Select a fare.

5) Select **Reserve**.

**Note about credit cards:**

Ghost cards are special credit cards used by some companies. Ghost cards **cannot** be used with Concur's mobile app.
**Use Taxi / MetrO / GateGuru**

On the Travel Apps menu on the Trips List:

- Use **Taxi Magic** – to search for a taxi and reserve a taxi.

**NOTE:** Since Taxi Magic is available only in the United States, the Taxi Magic option will appear on the Travel Apps menu for users with home addresses in the United States.

- Use **MetrO** to locate public transportation. MetrO is a free guide to public transport systems worldwide - with at least 400 cities included.

- Use **GateGuru** for information about airport amenities, food, shops, services, gates, ATMs, security, and more.

**Expenses and Expense Reports**

**List of Expenses (the Expenses Screen)**

Select Expenses on the home screen to access the Expenses screen. On the Expenses screen, you can:

- Add, view, edit, and delete Quick Expenses

**NOTE:** Quick Expenses are designed to be quick and easy. For more intricate expenses (car mileage/kilometers, attendees, and itemizations), create the expense from an open expense report.

- View and make minimal edits to card charges, which appear with the icon. Note the following:
  - To make more extensive edits, edit the transaction once it is attached to an expense report.
  - If you are allowed to delete card transactions in the web version of Expense, then you can delete them here, too.
- Attach expenses - both Quick Expenses and card charges - to an expense report.

**NOTE:** The icon indicates that there is a receipt image attached.
List of Reports (the Active Reports Screen)

Select Reports on the home screen to access the Active Reports screen.

On the Active Reports screen, reports are grouped by: Unsubmitted Reports, Submitted Reports, and Other Reports.

On the Active Reports screen, you can:

- Review the report status
- Delete a report
- Create a new report
- Access your expense reports so you can:
  - View and edit the report summary (report header)
  - View and attach receipt images
  - Add simple as well as more intricate expenses (car mileage/kilometers, attendees, and itemizations)
  - View, edit, and delete expenses
  - Submit your report
Create a Quick Expense

To add a simple expense:

- Use the + on the top of the Expenses screen
- or -
- Use Quick Expense on the home screen (shown below)

Delete an Expense from the Expenses Screen

You can delete Quick Expenses from the Expenses screen.

NOTE: If you are allowed to delete card transactions in the web version of Expense, then you can delete them here, too.
Attach Expenses (from the Expenses Screen) to a Report

You can attach expenses to an unsubmitted expense report or to a new expense report.

1) Select Add to Report.

2) The expenses can now be selected using the ☐ to the left of each expense. Select the desired expenses.

3) Select Add to Report.

4) Either:
   - To create a new report, select + at the top of the screen - or -
   - Select from existing reports

   The expenses appear on the new or existing report.
**Add a Car Mileage/Kilometer Expense – Fixed Rate**

You can add fixed-rate car mileage/kilometer expenses. There are two ways to add a mileage/kilometer expense:

- From the home screen (Method #1 below)
- From an open report (Method #2 below)

### Method #1:
1. On the home screen, select to access the menu.
2. Select Car Mileage.
3. Create a new report or select an existing report.

### Method #2:
1. Open a report, select to access the menu.
2. Select Add New Expense.
3. On the expense screen, select the Personal Car Mileage expense type. (Your company may use a different expense type name.)
4. Create the expense. Complete the fields on the Add Car Mileage screen.
5. Select Save.

Expense calculates the amount based on the distance and rate. The expense appears on the report.
Add a Car Mileage/Kilometer Expense – Variable Rate

Adding a variable-rate personal car mileage expense is the same, except – depending on your company’s configuration – you may also be able to:

- Select a different vehicle.
- Enter the number of passengers.

View and Edit an Expense on an Expense Report

If an expense is attached to an expense report, you can edit almost every field.

Open a report and select an expense. The Expense Details screen appears.

1) Open a report and select an expense.

2) Make the desired changes.

3) Select Save.
**Itemize an Expense on an Expense Report**

You can itemize an expense if the expense is attached to an expense report.

1) Open a report and select the expense.

2) Select **Itemize**.

3) Enter the dates and rates, and complete the remaining fields.

4) Select **Save**.

5) Concur creates expenses for each day and indicates if there is a remaining amount to be itemized. If there is a remaining amount, select to add the itemizations for the remaining amount.

6) Itemize the remaining amount.

7) Select **Save**.

The remaining amount equals zero.

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**Itemized: $0.00**
**Remaining: $823.81**

**Itemizations**

**Room Rate**
- Aug 15, 2011 - Residence In...
- $175.00
- Itemized: $800.00
- Remaining: $23.81

**Room Tax**
- Aug 15, 2011 - Residence In...
- $25.00

**Room Rate**
- Aug 14, 2011 - Residence In...
- $175.00
- Itemized: $800.00
- Remaining: $23.81

**Room Tax**
- Aug 14, 2011 - Residence In...
- $25.00

**Room Rate**
- Aug 13, 2011 - Residence In...
- $175.00
- Itemized: $800.00
- Remaining: $23.81

**Room Tax**
- Aug 13, 2011 - Residence In...
- $25.00

**Room Rate**
- Aug 12, 2011 - Residence In...
- $175.00

**Room Tax**
- Aug 12, 2011 - Residence In...
- $25.00
Add Attendees to an Expense on an Expense Report

You can add attendees to the expense if the expense is attached to an expense report. (Just like with the full-featured, web version of Expense, only certain expense types require attendees.) You can:

- Use the iPhone "bump" feature
- Select from the iPhone contacts list
- Enter attendee information manually
- Search and select from your Favorite Attendees list (the same list that is available on the full-featured, web version of Expense)

NOTE: The mobile app currently does not support the following Attendee configurable options: editing the count of attendees; manually changing the amount for an attendee; and the option to include the expense user as an attendee. For these activities, use the web version of Expense.

GETTING STARTED

1) Open the report and select the expense.
2) Select Attendees.
3) Select Add Attendee.
4) Select the desired method.

When all attendees have been added, Expense distributes the expense amount equally among all attendees.
**ADD ATTENDEE - BUMP**

You can add an attendee using the "bump" feature if the other person (attendee) also uses Expense on an iPhone, iPad, or iPod touch.

1) Select **Add Attendee via Bump**.

At the same time ... the attendee selects to access the menu and then selects **Attendee**.

The attendee selects **Become an Attendee**.

You and the attendee then bump your phones together to transfer the information. The attendee is added to the expense and to your favorite attendee list.
**ADD ATTENDEE - CONTACTS**

You can select from your phone's contact list if the attendee happens to be in your contact list.

1) Select **Select from Contact**.

2) Select the attendee from your contact list.

3) Enter the required attendee information. 4) Select **Save**.

The attendee is added to the expense and to your favorite attendee list.

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**ADD ATTENDEE - MANUALLY**

You can add an attendee by manually entering the appropriate information.

1) Select **Add Attendee Manually**.

2) Enter the required attendee information. 3) Select **Save**.

The attendee is added to the expense and to your favorite attendee list.
**ADD ATTENDEE - SEARCH**

You can search for attendees.

1) Select Search for Attendee.

2) Select Quick Search or Advanced Search.
   - Use Quick Search to quickly find an attendee in your Favorites list.
   - Use Advanced Search for a more extensive search.

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**Remove an Expense from an Expense Report**

To remove an expense from an expense report, swipe the expense; the Delete button appears.

**NOTE:** If you delete a Quick Expense or a card transaction from an expense report, it is not really deleted; it is moved back to your pool of expenses on the Expenses screen. (Any receipts associated with Quick Expenses or card transaction expenses remain as well.)

If you delete any other type of expense from an expense report, it is truly deleted. (This is consistent with the web version of Expense.)
**View and Edit the Report Summary (Report Header)**

You can view and edit the report header information.

1) Open the report, and then select **Report Summary**.

2) Make the desired changes.

3) Select **Save**.

**Create an Expense Report from the Active Reports Screen**

You can create a new expense report from the **Active Reports** screen (the expense report list).

1) Select the **+**.

2) Complete the required fields.

3) Select **Save**.

Then, add expenses from the expense list or create new expenses as described previously.
Delete an Expense Report from the Active Reports Screen

You can delete unsubmitted expense reports from the Active Reports list by swiping the report.

NOTE: If you delete a report that contains Quick Expenses or expenses created from card transactions, the Quick Expenses and card transaction expenses are not really deleted; they move back to your pool of expenses on the Expenses screen. (Any receipts associated with Quick Expenses or card transaction expenses remain as well.)

Any other type of expense is truly deleted. (This is consistent with the web version of Expense.)

Submit Your Report

When ready, select Submit. If you are allowed to select an approver before submitting an expense report, then you will be prompted to do so when you select Submit.
Work with Receipts

You can attach receipts to a report or to an individual expense.

1) On the home screen, select to access the menu, and then select Receipts.

2) Select Attach Receipt.

3) Take a picture using the phone's camera, select from the phone's Photo Album, or select from the Receipt Store.

Upload to the Receipt Store

1) On the home screen, select to access the menu, and then select Receipts.

2) Select + to upload.

Select an image to view it.
Approve Expense Reports (for the Expense Approver)

Report-level information:
- Report summary
- Receipt images
- Expense list

Expense-level information
- Receipt image
- Expense details
- Expense itemization
- Expense attendees
- Expense-level exceptions
- Expense-level comment

To view the receipt images, expense details, and header information:

1) Open the report.
2) Review the report summary (header).
3) Review the expense details, including attendees (if any), itemizations (if any), and receipts (if any).
4) Select Approve or Send Back. If you send a report back, you must provide a comment.
Approve Payment Requests (for the Invoice Approver Role)

Select **Invoice Approval** on the home screen to access the **Approve Invoices** page.

1) Open the request.

2) Review the information.

3) Approve or send back to the employee.

If you send the request back to the employee, you must provide a comment. If you approve the request, a confirmation message appears.
Miscellaneous

Use Locate & Alert

If your company uses Concur's Locate & Alert service, you can check in via the iPhone.

1) On the home screen, select (upper right corner) and then select **Location Check In**.

2) On the **Location Check In** page:
   - Select your current location
   - Select the number of days remaining at that location
   - Indicate whether immediate assistance is required
   - Enter a comment, if desired

3) Select **Check In**.
**Save Login ID and Auto Login**

1) Select 🔄 to access Settings.

2) Select Auto Login to have Concur log in automatically when you open the app.

3) Select Save User Name to have Concur remember and then provide your ID at login.

**NOTE:** You must select Save User Name in order to use auto login.

**Turn off Twitter**

1) Select 🔄 to access Settings.

2) Change Show Twitter to OFF.