# TravelWayne

## Receipt Store Reference Guide

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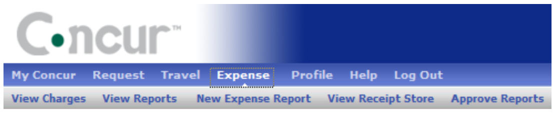
# Using Receipt Store

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.

There are two ways to access the Receipt Store:

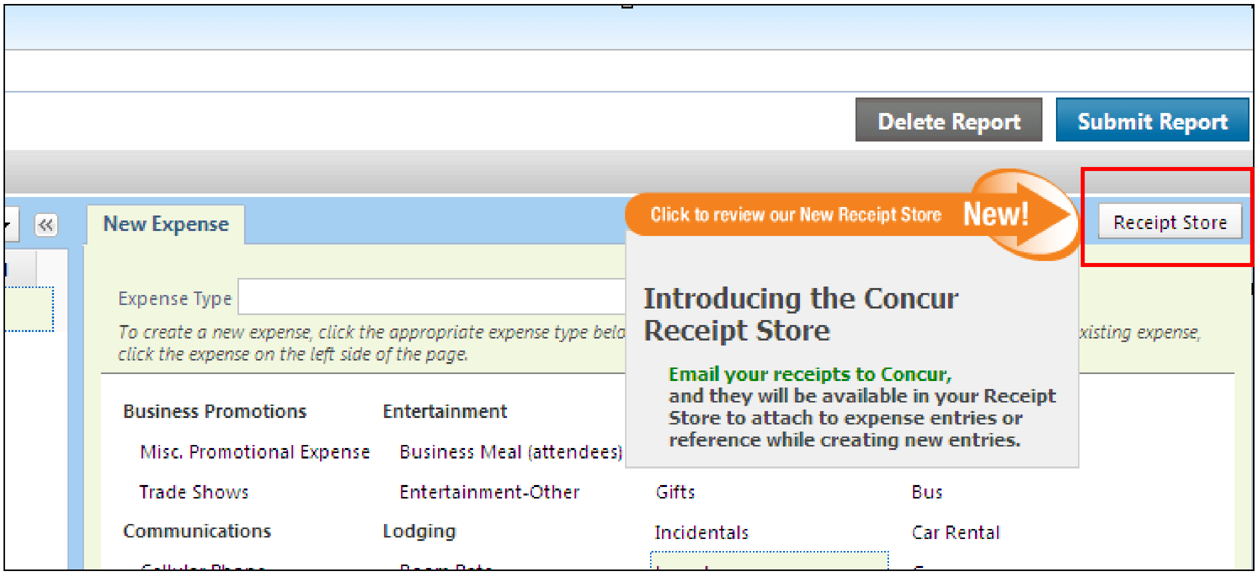
1. Click the **Expense** Tab & View Receipt Store


Concur
My Concur
Request
Travel
Expense
Profile
Help
Log Out
View Charges
View Reports
New Expense Report
View Receipt Store
Approve Reports

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 |
|---|---|
| 2. Click the **Receipt Store** button to begin the email verification process. | |


Delete Report
Submit Report
Click to review our New Receipt Store
New!
Receipt Store
New Expense
Expense Type
Business Promotions
Misc. Promotional Expense
Trade Shows
Communications
Entertainment
Business Meal (attendees)
Entertainment-Other
Lodging
Gifts
Incidentals
Bus
Car Rental

Introducing the Concur Receipt Store

Email your receipts to Concur, and they will be available in your Receipt Store to attach to expense entries or reference while creating new entries.

*To create a new expense, click the appropriate expense type belo*

*click the expense on the left side of the page.*

*xisting expense,*

# Section 1: Verify Email Addresses (continued)

## How to…

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

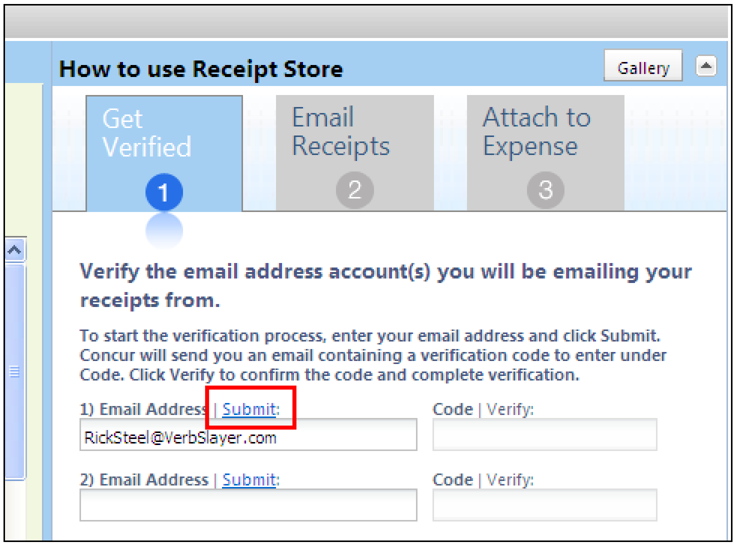
## Additional Information

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.



**Verify the email address account(s) you will be emailing your receipts from.**

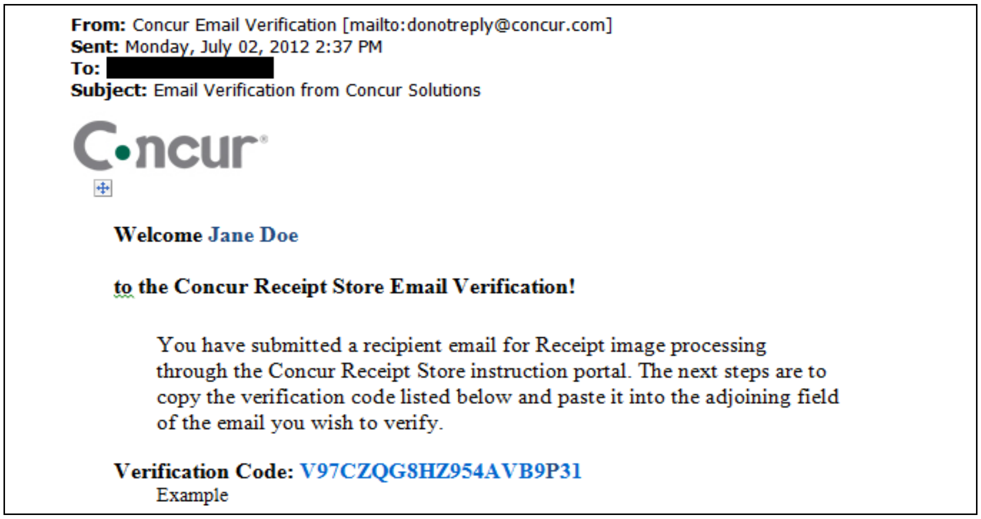
To start the verification process, enter your email address and click Submit. Concur will send you an email containing a verification code to enter under Code. Click Verify to confirm the code and complete verification.

1) Email Address | Submit: RickSteel@VerbSlayer.com
Code | Verify:

2) Email Address | Submit:
Code | Verify:

4. 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**.



**From:** Concur Email Verification [mailto:donotreply@concur.com]
**Sent:** Monday, July 02, 2012 2:37 PM
**To:** [redacted]
**Subject:** Email Verification from Concur Solutions

Concur

**Welcome** Jane Doe

**to the Concur Receipt Store Email Verification!**

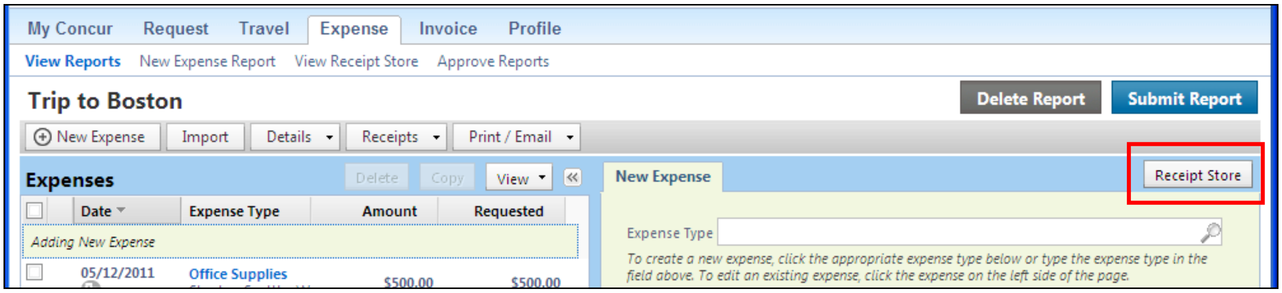
You have submitted a recipient email for Receipt image processing through the Concur Receipt Store instruction portal. The next steps are to copy the verification code listed below and paste it into the adjoining field of the email you wish to verify.

**Verification Code:** V97CZQG8HZ954AVB9P31
Example

# 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.

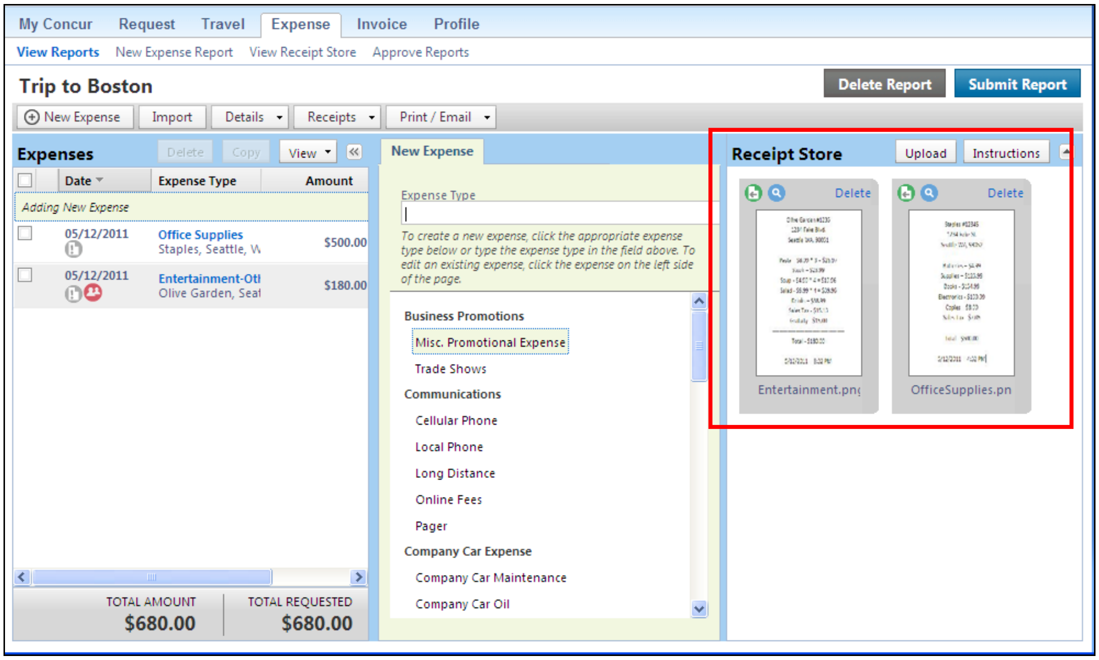
| How to… | Additional Information |
|---|---|
| 1. With your expense report open, click **Receipt Store**. | The Receipt Store is hidden by default. |


My Concur
Request
Travel
Expense
Invoice
Profile
View Reports
New Expense Report
View Receipt Store
Approve Reports
Trip to Boston
Delete Report
Submit Report
New Expense
Import
Details
Receipts
Print / Email
Expenses
Delete
Copy
View
New Expense
Receipt Store
Expense Type

| ☐ | Date | Expense Type | Amount | Requested |
|---|---|---|---|---|
| | *Adding New Expense* | | | |
| ☐ | 05/12/2011 | Office Supplies | $500.00 | $500.00 |

*To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.*

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


My Concur
Request
Travel
Expense
Invoice
Profile
View Reports
New Expense Report
View Receipt Store
Approve Reports
Trip to Boston
Delete Report
Submit Report
New Expense
Import
Details
Receipts
Print / Email
Expenses
Delete
Copy
View
New Expense
Expense Type
Business Promotions
Misc. Promotional Expense
Trade Shows
Communications
Cellular Phone
Local Phone
Long Distance
Online Fees
Pager
Company Car Expense
Company Car Maintenance
Company Car Oil
Receipt Store
Upload
Instructions
Delete
Delete
Entertainment.pn
OfficeSupplies.pn

| ☐ | Date | Expense Type | Amount |
|---|---|---|---|
| | *Adding New Expense* | | |
| ☐ | 05/12/2011 | Office Supplies<br>Staples, Seattle, W | $500.00 |
| ☐ | 05/12/2011 | Entertainment-Ot<br>Olive Garden, Seat | $180.00 |

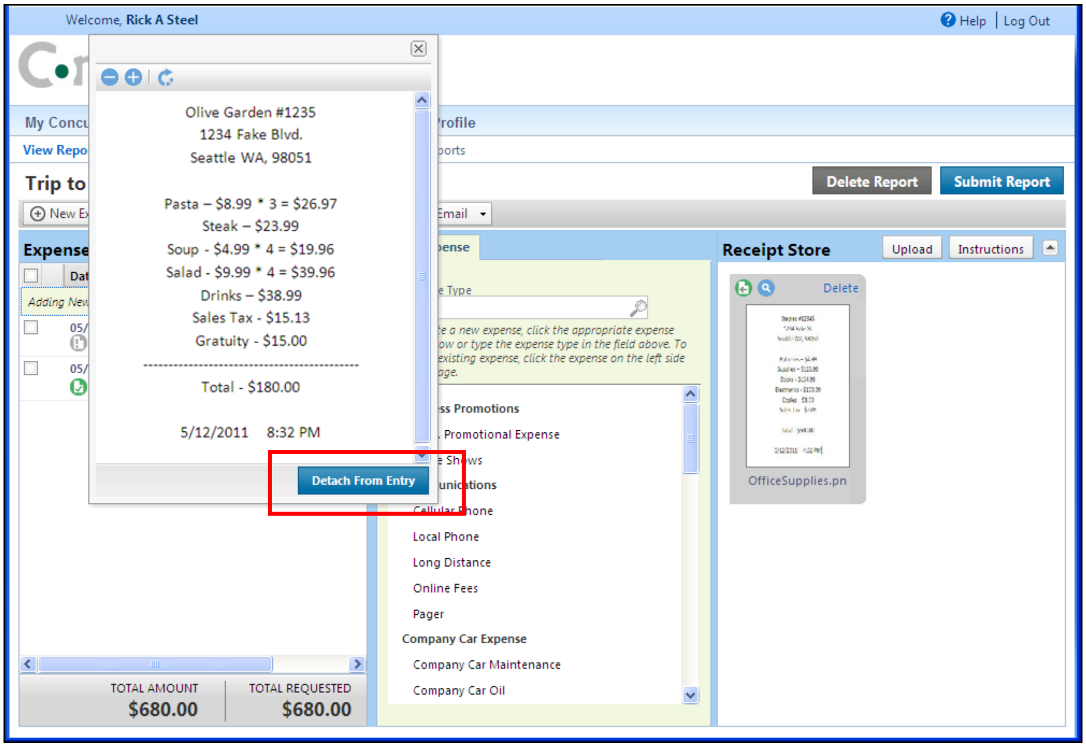
TOTAL AMOUNT $680.00
TOTAL REQUESTED $680.00

*To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.*

| | |
|---|---|
| 3. Click on a receipt image to view details of the receipt.<br>4. Expense entries that require a receipt will display the **Receipt Image Required** icon.<br>(!) | You can rotate an opened image for easier viewing. Click **Save** to save the changes. |

# 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, mouse over the **Receipt Received** icon. | Click **Detach From Entry** to remove this receipt from the expense. |


Welcome, Rick A Steel
Help | Log Out
Delete Report
Submit Report
Receipt Store
Upload
Instructions
Delete
OfficeSupplies.pn
Detach From Entry
TOTAL AMOUNT
$680.00
TOTAL REQUESTED
$680.00
Company Car Expense
Company Car Maintenance
Company Car Oil
Local Phone
Long Distance
Online Fees
Pager

Olive Garden #1235
1234 Fake Blvd.
Seattle WA, 98051

Pasta – $8.99 * 3 = $26.97
Steak – $23.99
Soup - $4.99 * 4 = $19.96
Salad - $9.99 * 4 = $39.96
Drinks – $38.99
Sales Tax - $15.13
Gratuity - $15.00

Total - $180.00

5/12/2011 8:32 PM

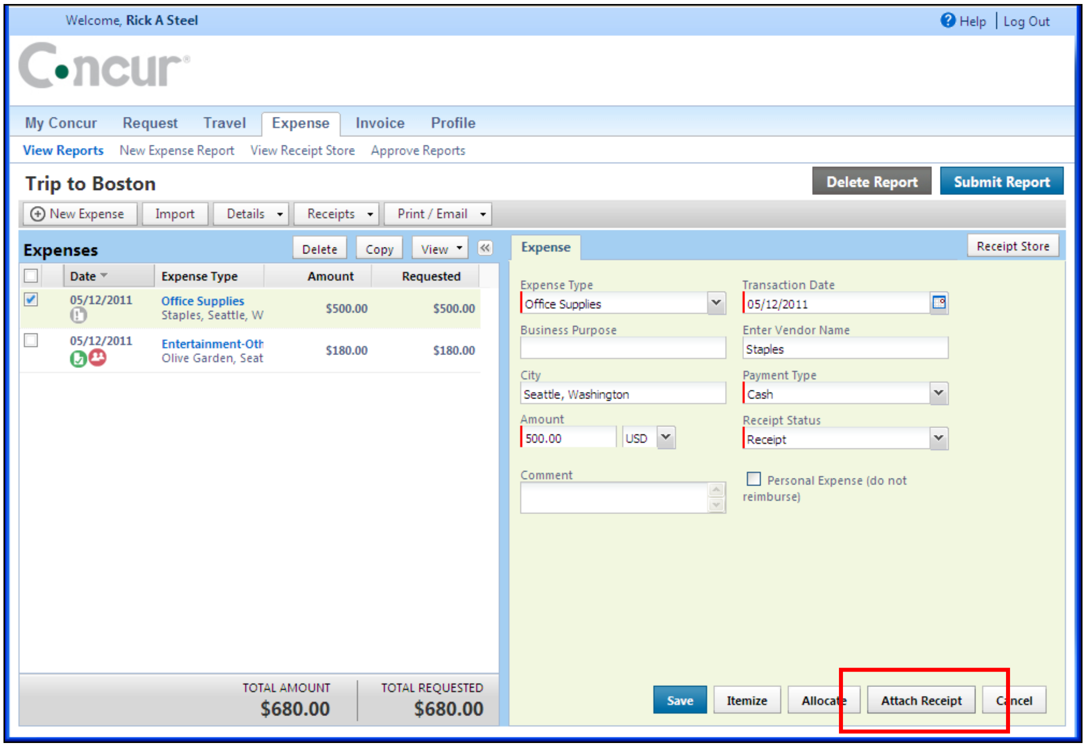
# Section 3: Upload Receipt Images

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.


Welcome, Rick A Steel
Help | Log Out
Concur
My Concur
Request
Travel
Expense
Invoice
Profile
View Reports
New Expense Report
View Receipt Store
Approve Reports
Delete Report
Submit Report
New Expense
Import
Details
Receipts
Print / Email
Delete
Copy
View
Receipt Store
Save
Itemize
Allocate
Attach Receipt
Cancel

Trip to Boston

Expenses

| | Date | Expense Type | Amount | Requested |
|---|---|---|---|---|
| ☑ | 05/12/2011 | Office Supplies<br>Staples, Seattle, W | $500.00 | $500.00 |
| ☐ | 05/12/2011 | Entertainment-Oth<br>Olive Garden, Seat | $180.00 | $180.00 |

TOTAL AMOUNT $680.00
TOTAL REQUESTED $680.00

Expense

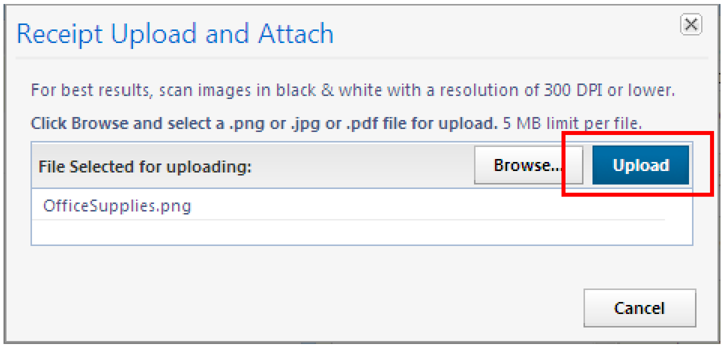
Expense Type: Office Supplies
Transaction Date: 05/12/2011
Business Purpose:
Enter Vendor Name: Staples
City: Seattle, Washington
Payment Type: Cash
Amount: 500.00 USD
Receipt Status: Receipt
Comment:
☐ Personal Expense (do not reimburse)

2. Click **Attach Receipt**.

The **Receipt Upload and Attach** dialog box opens.

3. Click **Browse**.
4. Navigate to the location on your computer where you saved the receipt image file.
5. 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, TIFF or PDF files.


Browse...
Upload
Cancel

Receipt Upload and Attach

For best results, scan images in black & white with a resolution of 300 DPI or lower.

Click Browse and select a .png or .jpg or .pdf file for upload. 5 MB limit per file.

File Selected for uploading: OfficeSupplies.png

# Section 3: Uploading Receipt Images (continued)

| How to… | Additional Information |
|---|---|
| 6. Click **Upload**. | Once uploaded, the receipt icon associated with the expense changes to the **Receipt Received** icon.<br>✓ |
| 7. 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.<br>Click **Detach From Entry** to remove this receipt from the expense. |