Concur Request Quick Start Guide

Concur Technologies

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Create a New Request

NOTE: Your company may or may not use the Concur Request feature. Verify with your Concur administrator.

If your company is configured to use the Concur Request feature and if you have the Request User role:

- The Requests option appears in the menu.
- The Open Requests tile appears on the home page.

Create a new request

To create a new request:

1. Either:
   - On the Quick Task Bar, click New > Start a Request
     - or -
   - On the menu, click Requests > Create New (on the sub-menu) > New Request

   The Request page appears, with the Request Header tab selected.

2. On the header, complete all required fields and the optional fields including cash advance

- If a policy uses the same icon twice, only icon appears on the Segment tab. Click the down-pointing arrow to the right of the icon and select from the dropdown.

b) Complete the segment fields. Note the following about segment fields:

- Amount field:

  Enter the total amount for the trip. Specifically, for car rental and hotel, enter the total amount - not the daily rate.

  You can enter zero if necessary.

- Detail field (car rental and hotel):

  Enter the *location* information, such as "pick-up at airport" or "hotel near the waterfront"

  Enter the *preference* information, such as "automatic transmission, non-smoking" or "non-smoking room"

NOTE: These are general guidelines, check with your company to ensure that you fully understand what is expected in these fields.

c) Click Save. Note the following:

- As you save segments, the running total appears in the top right corner of the request (below the Submit Request button).

- If any of the segments are entered in a currency other than your reimbursement currency if the Expense Rates feature is properly configured, then:

  The total reflects the conversion to your reimbursement currency.

  The system uses the current exchange rate.

  The conversion is calculated when the segment is saved, and it is recalculated if the segment is reopened and saved.

d) Click another segment icon, complete the fields, and click Save until all desired segments have been added.

5. On the Expenses tab:

- Select the appropriate expense type and date.
- Enter the estimated amount.
- Add attendees