Creating and Submitting Expense Reports in SAP Concur

Subject:

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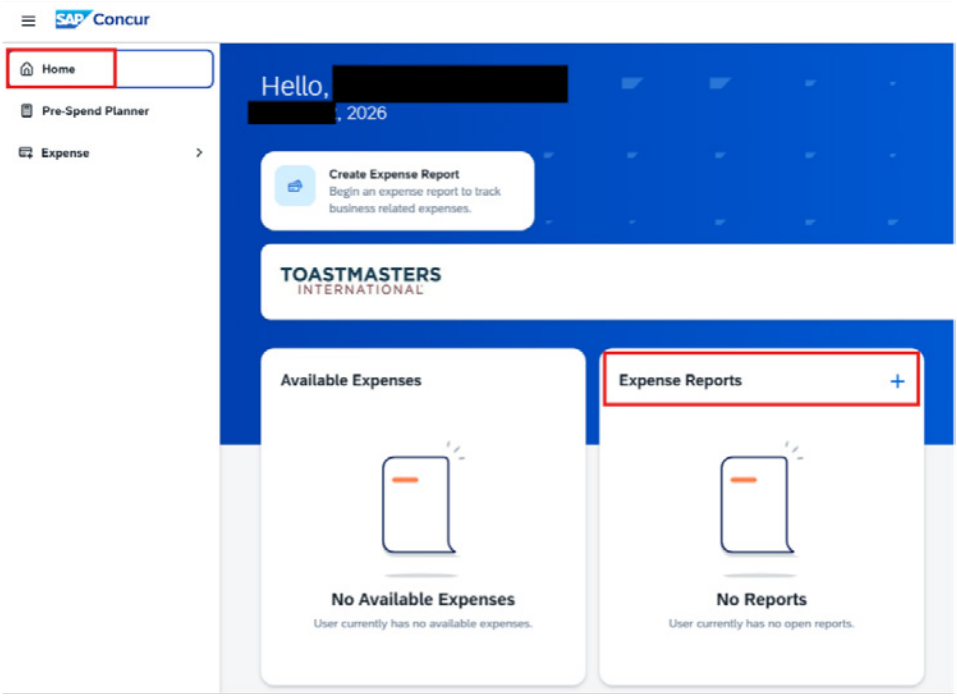
Purpose:

This is the process for District leaders to submit out-of-pocket (OOP) expenses incurred during the year through Concur. This business process includes the high-level procedure for more experienced Concur users, as well as a step-by-step procedure for newer Concur users.

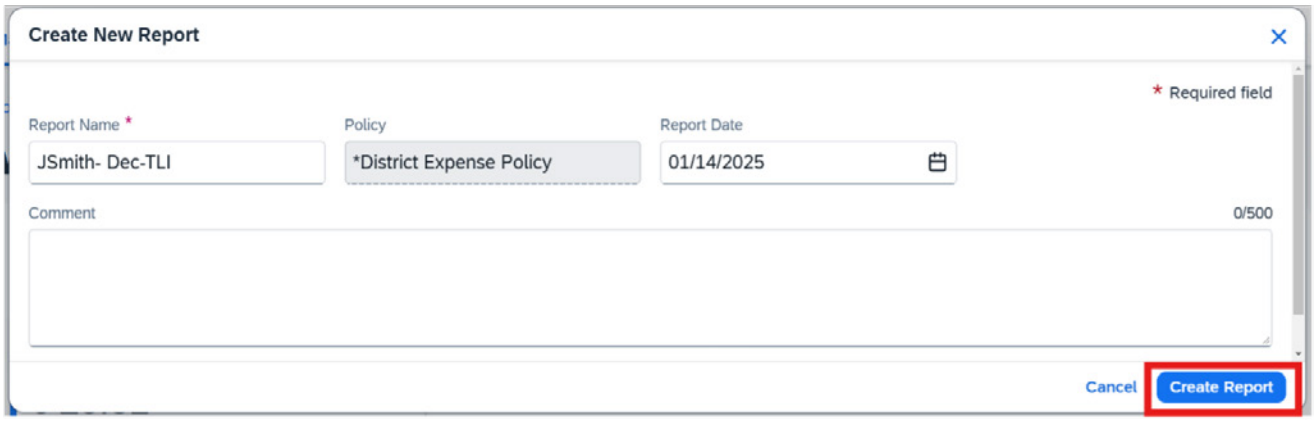
Step by Step Procedure:

1. Open a browser on your computer.
2. Navigate to **concursolutions.com/**
3. Log in to Concur using your District credentials. For your first login, please see the following user ID and password instructions.
   a. User ID: [8-digit member ID]@toastmasters.org
      - Example: **00112233@toastmasters.org**
   b. Select "forgot password".

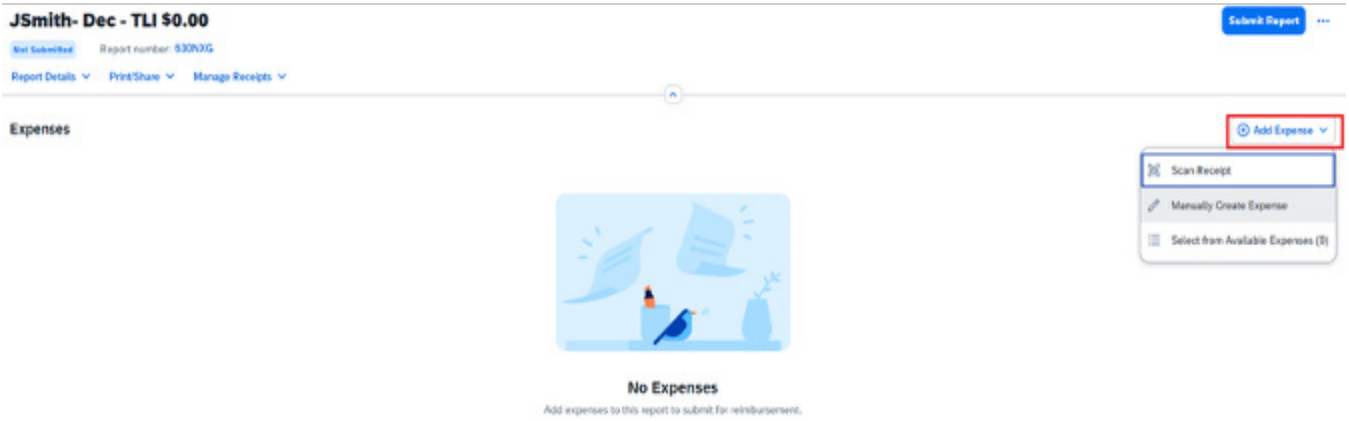
   This should email you a link allowing you to update your password and subsequently log in. If you have any issues with login specifically, including the two-factor authentication requirement, please view the **Logging into Concur training**. If you continue to have issues, please email District Finance at **districtconcur@toastmasters.org**.
4. Click on the + (plus mark) icon on the Home menu.



5. Create a new expense report, titled as follows: <First Initial Last Name>-<Month>-<Description> (example: JSmith-Dec-TLI)
    a. Policy: *District Expense Policy (This should default and not need to be changed.)
    b. Report Date: (This should default to the current date and not need to be changed.)
6. Create a new expense report, titled as follows: <First Initial Last Name>-<Month>-<Description> (example:



7. Enter each incurred expense with the appropriate information.
    a. Click “Add Expense”.



    b. Select or search for the related expense type “Account Label”. This will relate to the type of charge you are entering. Some common examples include:
        i. 7060: AIRFARE EXPENSE
        ii. 7062: MILEAGE EXPENSE (See page 7 for a detailed walkthrough.)
        iii. 7064: TAXIS/SHUTTLE EXPENSE
        iv. 7066: RAIL EXPENSE
        v. 7068: TRAVEL – OTHER
        vi. 7058: LODGING
        vii. 7016: MEAL EVENT EXPENSE
        viii. 7078: FOOD EXPENSE
        ix. 7056: CONVENTION REGISRATION FEES

c. There are additional account labels available, and they are listed in the options.



d. Update the following information, as needed:

i. Expense Type – Please see above.

ii. Transaction Date – This will be the date on which the expense was incurred and should match what is listed on the receipt/invoice for the transaction.

iii. Business Purpose – Brief title or description of expense.

iv. Vendor – Enter vendor name from receipt/invoice.

v. City of Purchase – This can remain blank.

vi. Payment Type – This should default to "Cash/Out of Pocket" and should not be changed.

vii. Amount – Enter the amount of the transaction.

viii. Currency – Enter the currency of the transaction.

ix. Reporting Code – This should match how the expense was budgeted, for example:

- Travel Reporting Codes – All travel-related expenses for the individual.
- Lodging Reporting Codes – All lodging-related expenses for the individual.
- Food and Meals Reporting Codes – All District-related food and meal event expenses paid for by the individual.

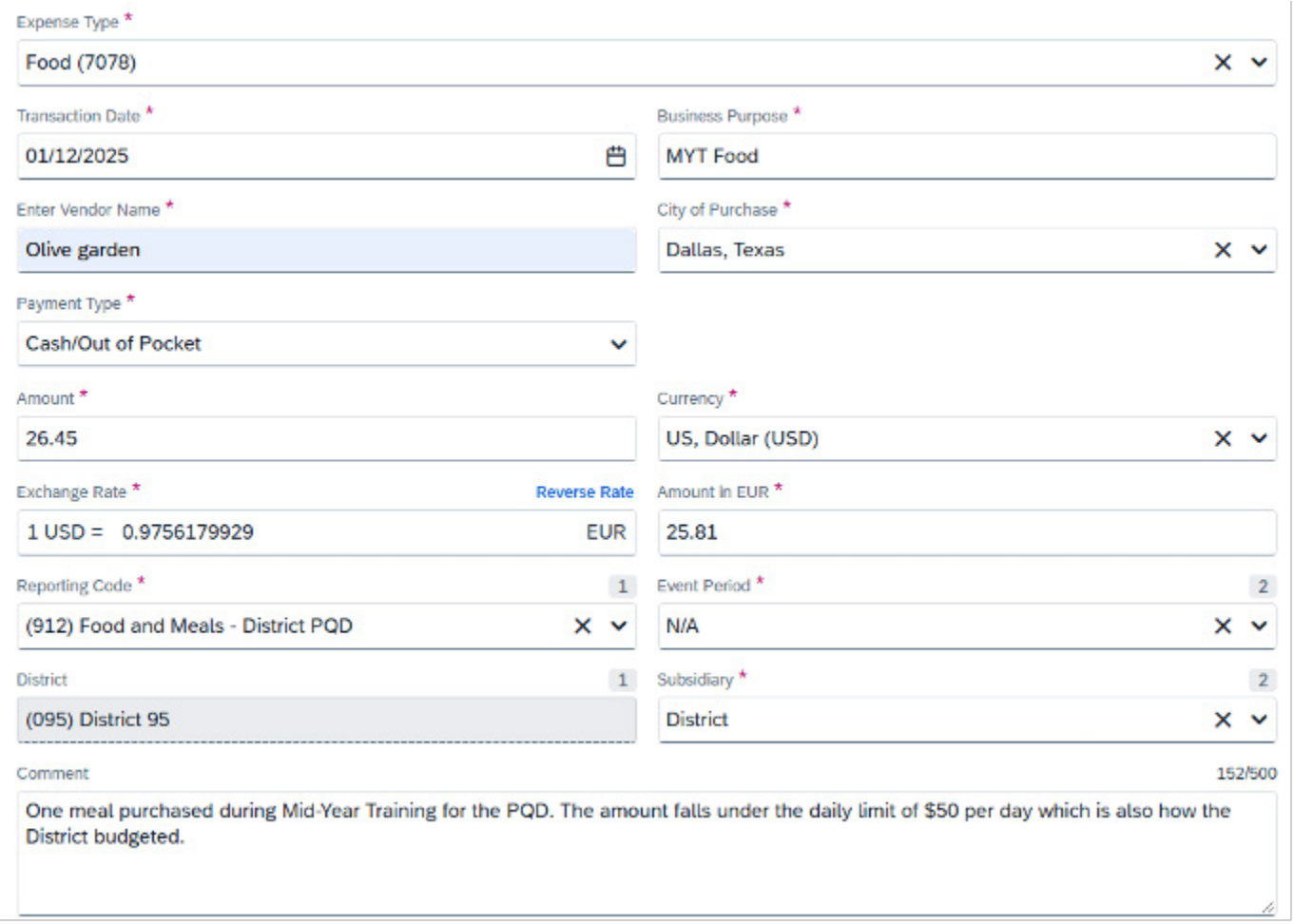
x. Event Period – This will either have the option for N/A or may be changed to the month the District expense is related to, for example:

- (2025-04) or (2025-05) for District Conference-related expenses.

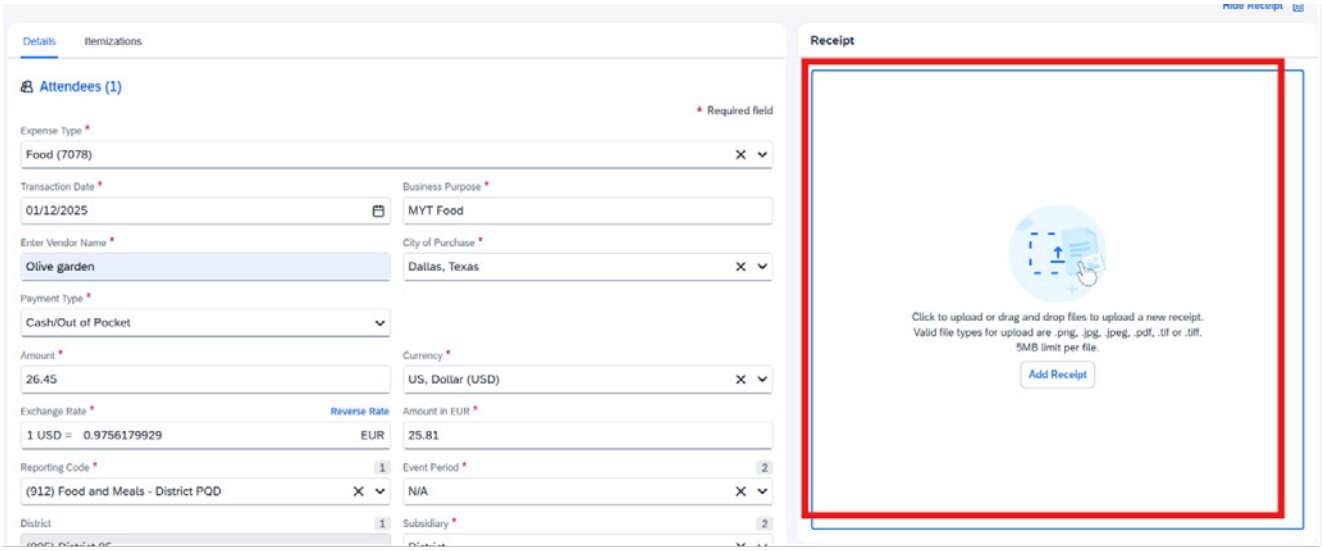
xi. District – This should default to your District. If this information is incorrect, please contact the District Finance team at **districtconcur@toastmasters.org**.

xii. Subsidiary – We recommend using "District", there may be other available options that can be selected if relevant as well.

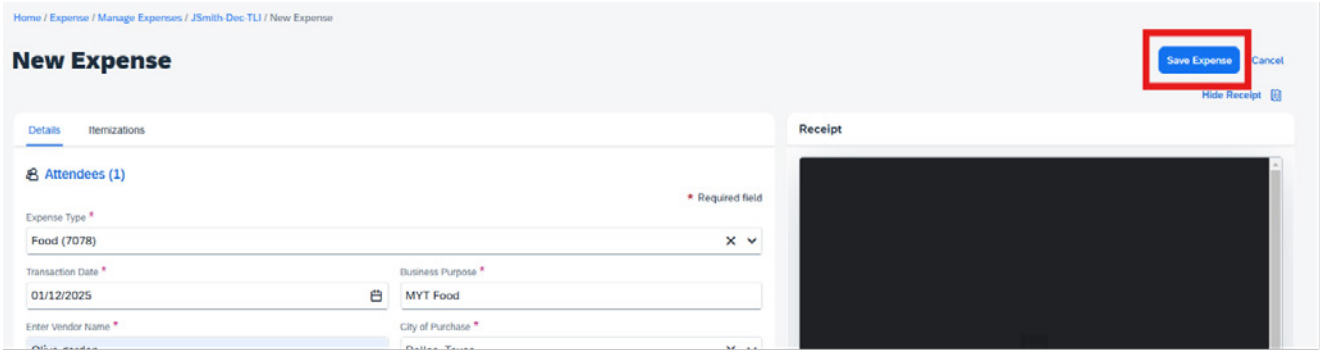
8. Below is a sample of an expense submitted:



9. Add the receipt for the transaction in the right-hand pane. This can be done by dragging the receipt into the box or clicking on "Add Receipt" and attaching the receipt from your computer..



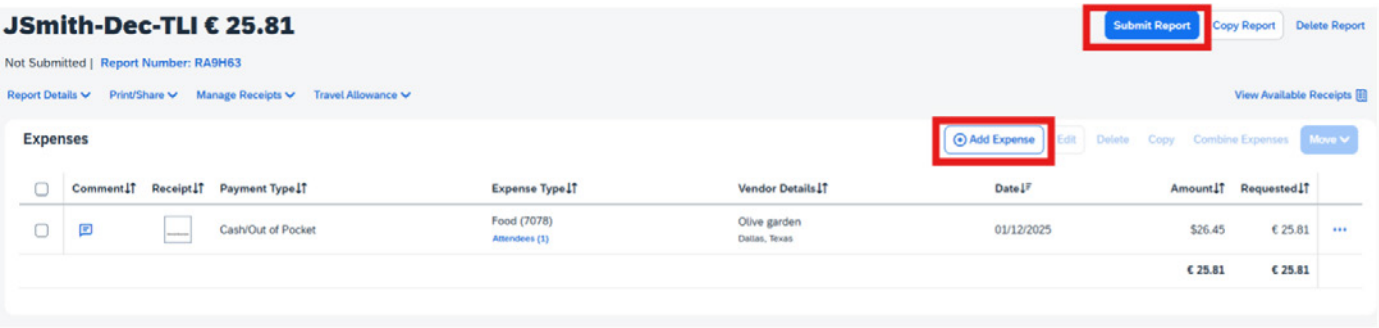
10. Save your expenses after you complete all required fields and attach your receipt.



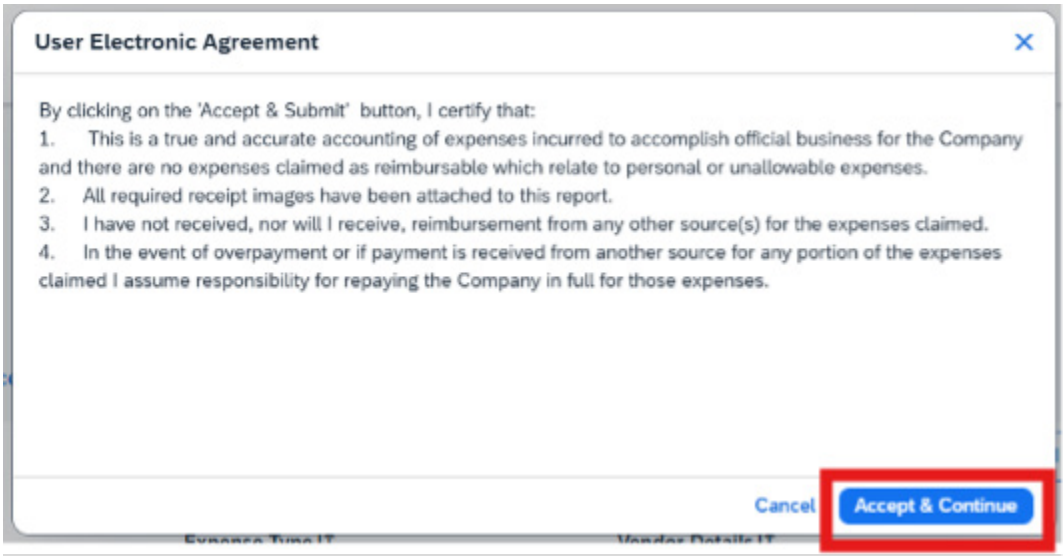
11. Once you save your expenses, you will have the option to submit your report or add another expense.

    Please note: You do not have to create a new report for each expense, you may combine your expenses into one report, even if they relate to multiple trips at different times.

    - District Director: For District credit card expenses please submit **one** report each month with all the expenses for that month.



12. Once you have added all your expenses and clicked "Submit Report", an electronic agreement will appear. Click "Accept & Continue".



Travel – Mileage Expense

Please note: All District Leader mileage reimbursements will need to align with Policy 8.3: District Fiscal Management, section 3B; the reimbursable mileage rate may differ based on the member's residence.

Allowable travel expenses may include up to round-trip airfare or other public transportation (coach) or mileage up to the current charitable standard mileage rate in effect for federal income tax purposes by the United States Internal Revenue Service (IRS) by the most direct route for the following individuals:

- United States citizens residing in the United States; or
- United States citizens residing outside of the United States who file a United States tax return; or
- Non-United States citizens residing in the United States.

For non-United States citizens residing outside of the United States, reimbursement is governed by local regulations and/or District policy, not to exceed the current IRS standard business rate.

Non-United States citizens residing in the United States.

- Transaction Date – Travel date(s).
- Business Purpose – Brief title or description of expense.
- City of Purchase – City of travel.
- Payment Type – This should default to "Cash/Out of Pocket" and should not be changed.
- Amount – Enter the amount of reimbursement.
- Currency – This will automatically populate to your preferred currency but may be updated.
- Reporting Code – This should match how the expense was budgeted, for example:
  - Travel Reporting Codes – All travel-related expenses for the individual.
- Event Period – This can only be "N/A".
- District – This should default to your District, if this information is incorrect, please contact the District Finance Team at **districtconcur@toastmasters.org** before submitting.
- Subsidiary – We recommend using "District", there may be other available options that can be selected if relevant.
- Comment – We recommend including the calculation for your mileage reimbursement if it is not stated on the receipt attachment.

Add a screen capture for the mileage in the right-hand pane. This can be done by dragging the image into the box or clicking on "Add Receipt" and attaching the image from your computer.

New Expense

Details | Itemizations

Expense Type *
Mileage (7062)

Transaction Date *
01/12/2026

Business Purpose *
Mileage to Airport

Enter Vendor Name

City of Purchase *
Denver, Colorado

Payment Type *
Cash/Out of Pocket

Amount *
4.40

Currency *
US, Dollar (USD)

From Location
Toastmasters International

To Location
Denver International Airport

Number of Miles *
31.4

Reporting Code * 1
(963) Travel - Other Member

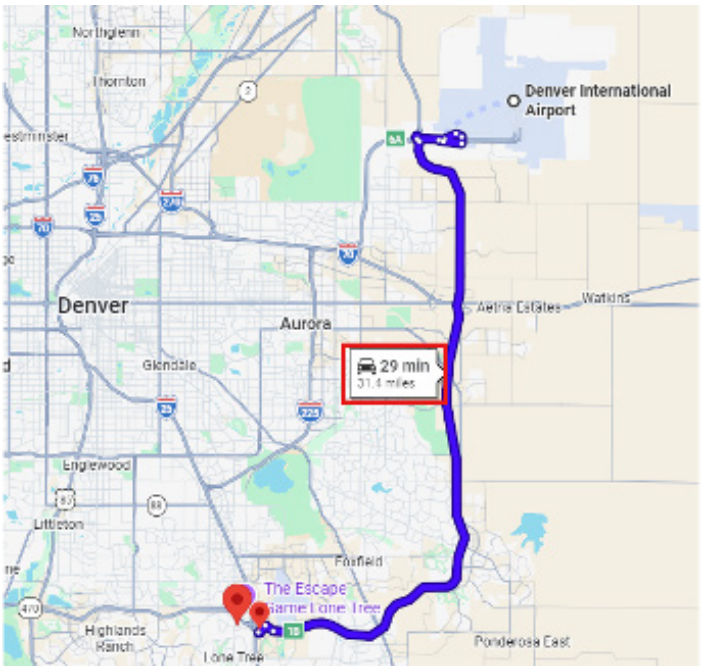
Event Period * 2
N/A

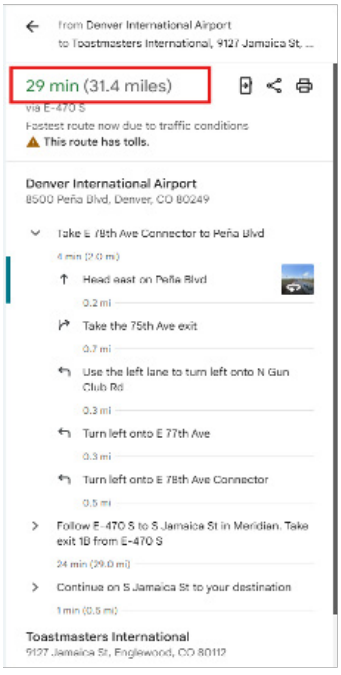
District * 1
(026) District 26

Subsidiary * 2
District

Comment 98/500
Mileage calculation: 31.40 miles * 14 cents per mile (IRS Charitable rate) = 4.396 (rounding 4.40)

Examples of receipt attachments:





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