

**Step-by-Step Guide**  
*Procurement Card & Travel Reconciliation Expense Reports:*  
**Step 4c – Attaching Documents by Receipt Store to Individual Expenses**

There are three ways to attach documents to an expense report in the Concur Travel & Expense System: scanning, faxing, or using the Receipt Store to attach to individual expenses.

**Note:** Approvers have the ability to attach additional documents to a report that has been submitted to them for review. However, documents cannot be deleted once the expense report is submitted.

### **What is the Receipt Store?**

The Receipt Store is a feature within Concur that provides a document repository to which you can email or upload images. You can then use Receipt Store to attach images to an individual expense. This can make the approval process easier for your approver(s) because the expense and document(s) are displayed side-by-side.

Access your Receipt Store from within your expense reports.

**Note for delegates:** You can view someone else's Receipt Store if you were granted permission to view receipts when identified as his or her delegate.

Supported image formats are .html, .jpg, .jpeg, .pdf, .png, .tif, or .tiff. Other image formats cannot be used within the Receipt Store.

### **Adding Images to Your Receipt Store**

There are four ways to add images to your Receipt Store:

1. Upload images directly to Receipt Store.
2. Forward emails of receipts (receipts can either be attached to the email or embedded in the email content) to [receipts@concur.com](mailto:receipts@concur.com).
3. Use your smart device to take pictures of receipts and email the pictures to [receipts@concur.com](mailto:receipts@concur.com).
4. Use [Concur Mobile](#) to take pictures of receipts, which are then stored in your Receipt Store automatically.

Before sending emails to [receipts@concur.com](mailto:receipts@concur.com), you must first verify your email address(es). Visit the [Verifying Your Email Address\(es\) section](#) at the end of this document for further guidance.

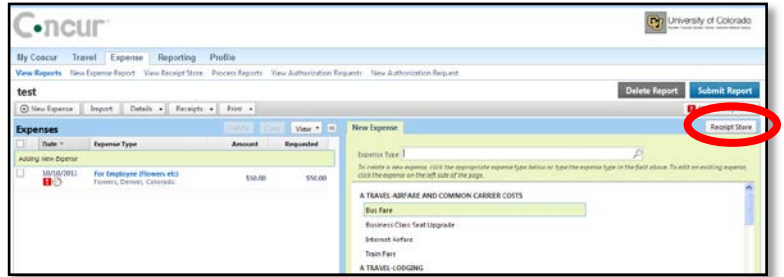
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#### Uploading Images Directly to Your Receipt Store

Begin by scanning the required documentation and saving the images to your computer (or other appropriate space as per your department). You can use clear sleeves (also known as document carriers) to help scan smaller documents.

When you are ready to attach the images, click the **Receipt Store** button located in the upper right hand corner of your expense report.

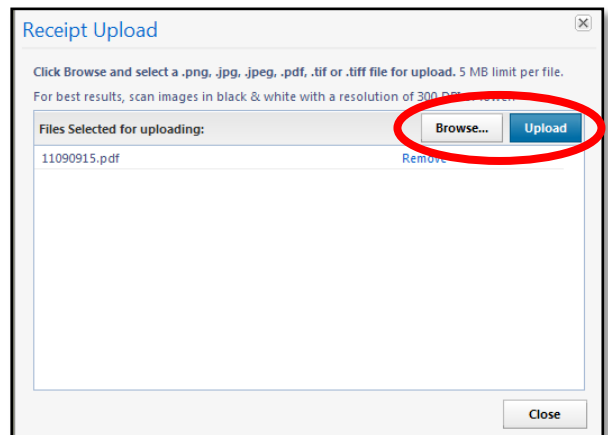


Your Receipt Store will appear. Click **Upload** in the upper right corner of your Receipt Store. A separate window will appear.

Attaching scanned receipts to an expense report is similar to attaching a document to an email. Click **Browse**.

The Choose File to Upload window opens. Locate and select the receipt image you would like to attach and click **Open**.

The receipt images to be attached will be listed under **Files Selected for uploading**. You can attach up to 10 files – each file no more than 5 MB in size – at a time.



Once all appropriate filenames appear for uploading, click **Upload**. The status of each file will change to *Uploaded* once it has been uploaded to your Receipt Store.

Click **Close** once every file listed has a status of *Uploaded*. Repeat this process as many times as needed until each document is saved to your Receipt Store.

Your Receipt Store keeps your uploaded files until they are attached to an individual expense within one of your expense reports, at which time the files will no longer appear in your Receipt Store. If the file is later detached from the expense, see [below](#), it will be returned to your Receipt Store.

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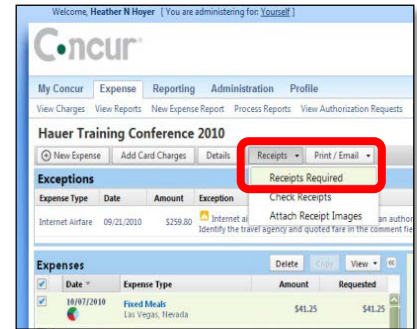
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#### Attaching Images to Individual Expenses Using Receipt Store

The first step was to create your expense report by completing the Report Header. Then, expenses were added to your expense report and (if needed) allocated. Now it is time to attach images within your Receipt Store to your expenses.

If you would like to view a list of required documentation for your expense report, use the **Receipts** dropdown and select **Receipts Required**.

The Receipt Review window appears, and lists only those expenses on this expense report that require documentation.



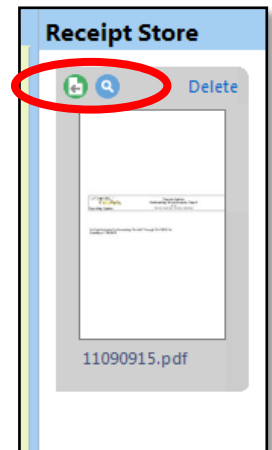
**Note:** You can perform these steps when adding expenses, if desired.

Select an expense so the details appear in your right-hand pane. Click the **Receipt Store** button.

Attach the image by clicking on the green *Attach* icon in the upper left corner of the image thumbnail. You can view the image before attaching the document by opening the document using the blue *View Image* icon.

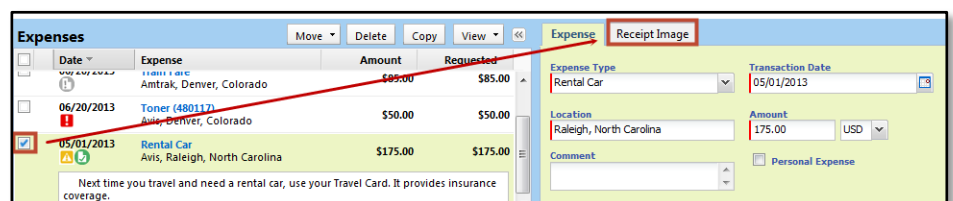
Your Receipt Store will remain open as you select another expense. Repeat this process as many times as needed until all required documentation is attached to your expenses within your expense report.

To close your Receipt Store, click the arrow in the upper right corner of your Receipt Store pane.



No matter your method for attaching, you always want to review the attached images.

One way to do this is to select an expense and click the **Receipt Image** tab above the expense's details at the top of your right-hand pane.



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Or, you can hover your mouse over the Receipt Image Available icon – it appears in your left-hand pane under an expense once an image has been attached to it. A pop-up window will appear with the attached image.

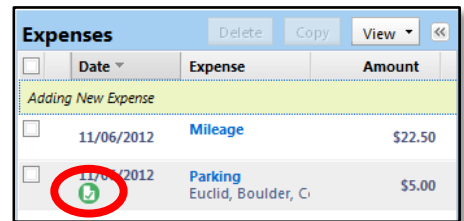


	Date	Expense	Amount
Adding New Expense			
<input type="checkbox"/>	11/06/2012	Mileage	\$22.50
<input type="checkbox"/>	11/06/2012	Parking Euclid, Boulder, Co	\$5.00

Or, to view all images in the same area, use the **Receipts** dropdown and select **Check Receipts**. (The Check Receipts option will change to two options after your first review: View Receipts in New Window and View Receipts in Current Window.) Your attached images will appear in a separate window. After reviewing your images, close the window.

## Detaching Images from Individual Expenses

Hover your mouse over the Receipt Image Available icon – it appears in your left-hand pane under an expense once an image has been attached to it. A pop-up window will appear with the attached image. Click the **Detach from Entry** button within the pop-up window.



	Date	Expense	Amount
Adding New Expense			
<input type="checkbox"/>	11/06/2012	Mileage	\$22.50
<input type="checkbox"/>	11/06/2012	Parking Euclid, Boulder, Co	\$5.00

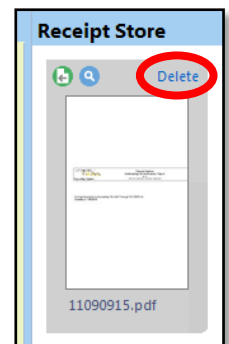
Your detached image is returned to your Receipt Store, where it will remain until it is attached to an individual expense or deleted from your Receipt Store (see below).

## Deleting Images from Your Receipt Store

**Note:** If the image is attached to an individual expense, it must first be detached before you can delete it from your Receipt Store (see above).

Click the **Receipt Store** button, if needed. Locate the appropriate image for deletion. Then, delete it by clicking the **Delete** link in the upper right corner of the image thumbnail.

A confirmation message will appear; click **Yes** to delete the image from your Receipt Store, otherwise click **No**.



Now that you have attached images to your expense report using your Receipt Store, you are ready to go on to [Step 5 – Setting Approval Flow](#).

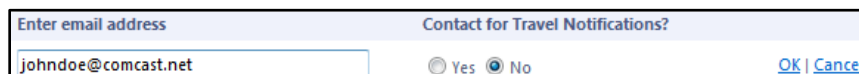
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### Verifying Your Email Address(es)

Before sending emails to [receipts@concur.com](mailto:receipts@concur.com), you must first verify your email address(es). This is necessary for Concur to associate information sent from your email address(es) to your Concur account...and upload into your Receipt Store.

1. From your Concur home page, click **Profile** (upper left corner of the screen).
2. Select **Email Addresses** from the menu along the left side of the screen.
3. If the appropriate email address isn't listed, click the **Add an email address** link (right side of screen). Enter the email address in the field that appears, indicate whether you want Concur travel notifications sent, and click the **OK** link.



4. The email address now appears in the list with a status of *Not Verified*.



5. Click the **Verify** link.
6. A confirmation message appears; click **OK**.
7. Retrieve the Email Verification email sent from Concur. The email contains a code that you will need to enter in Concur. If you prefer, you can copy the code from the email by highlighting it and then pressing the copy shortcut (Ctrl+C) on your keyboard.
8. Go back to Concur and enter the code. If you copied the code from the email, click in the field and then press the paste shortcut (Ctrl+V) on your keyboard.
9. Click **OK**.
10. The email address now has a status of *Verified*. You may now use this email address to send images to your Receipt Store.
11. Repeat for additional email addresses as needed.

