

Introduction to.....

Concur for Mobile – Windows Phone

Version 1.1 – March 27 2014

Applies to these Concur solutions:

- Expense
- Travel



Contents

User Roles and Permissions 2

Registration 2

Logging On to Concur 2

View an Itinerary 3

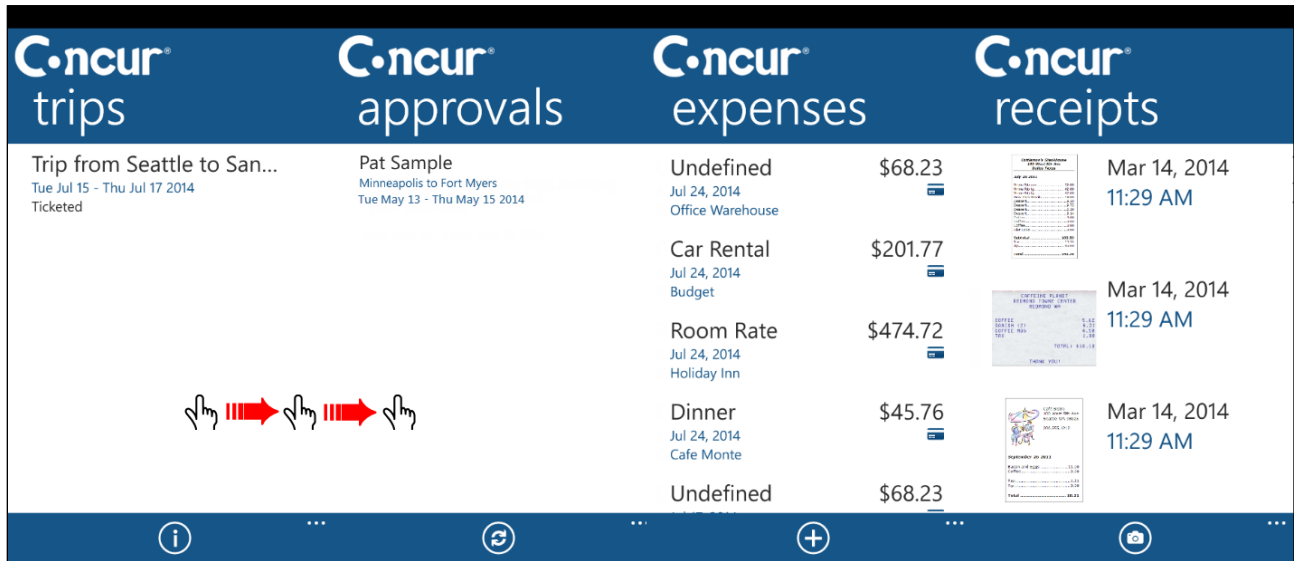
Approve a Trip 4

View Agency Information 5

View Expenses 5

Create a Mobile Expense 6

You can use Concur on your Windows Phone to assist with your Expense and Travel needs. Because you are 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.



You can check your itinerary, enter out-of-pocket expenses real-time, and take a picture of the associated receipt. If you are an approver, you can approve trips.

User Roles and Permissions

Users with the Travel Wizard User role/permission have access to the Travel-related features. Users with the Expense User role/permission have access to the Expense-related features.

Registration

The **Mobile Registration** link appears on the **Profile** menu in the web version of Concur. Two reasons to use the registration page:

- You can download the app directly from the Windows Phone app store or you can use this page to request that a link be sent to your device.
- When you log in to the app, you can use the same login credentials that you use for the web version of Concur or you can create a PIN on this page and then use it to log in.

My Concur Request Travel Expense Central Reconciliation Invoice Purchase Request Reporting Locate Administration Profile App

Personal Information Change Password System Settings **Mobile Registration** Travel Vacation Reassignment

My Profile

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates
- Expense Preferences
- Expense Approvers
- Favorite Attendees
- IC Cards

Capture your receipts and manage your travel on the go!

Learn More

Review your login details

Login Information

Username: cc@RandomVerbs.com

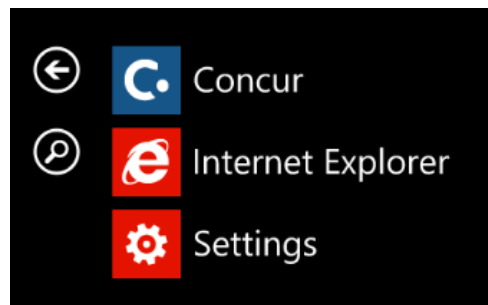
Password: Use the same password you use to log in to Concur for Web. If you don't know your password, you may [reset your password](#) or [create a mobile PIN](#)

Download the app

Or send a link to your device - enter your email address or mobile phone number (including country code for non-US numbers) and we will send you a link to get the app:

cc@RandomVerbs.com Send Link

Logging On to Concur



Once you have downloaded the Concur app from the Windows Phone app store, locate the Concur icon. Start the application and log in with your mobile PIN or your web credentials.

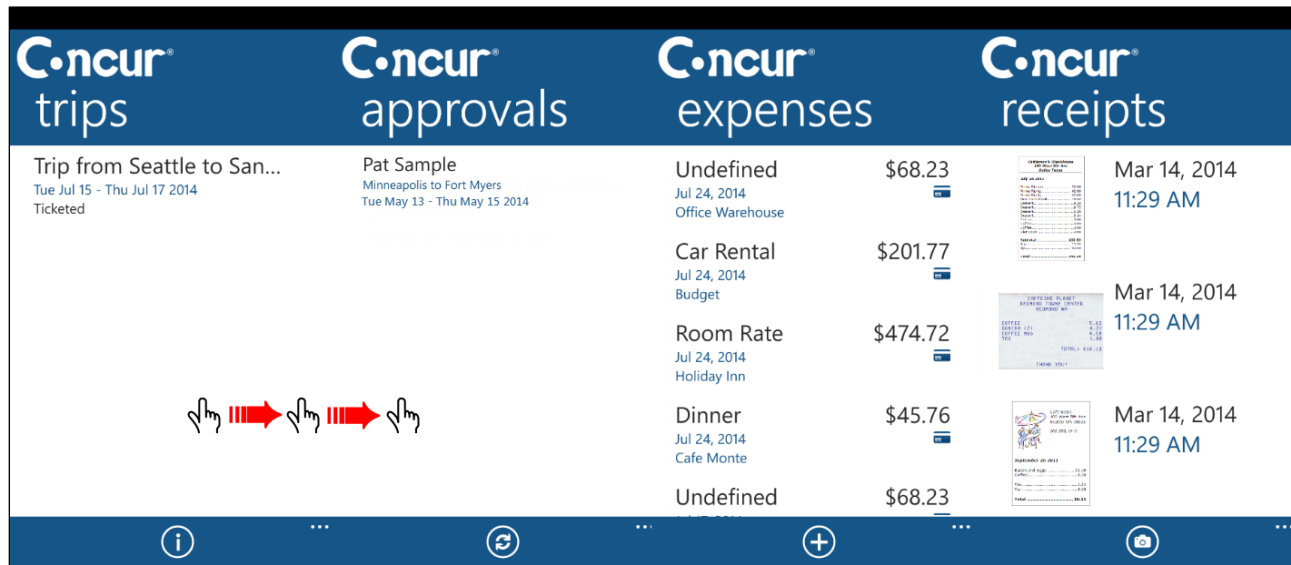
Concur®

Concur User Name

Concur Password or PIN

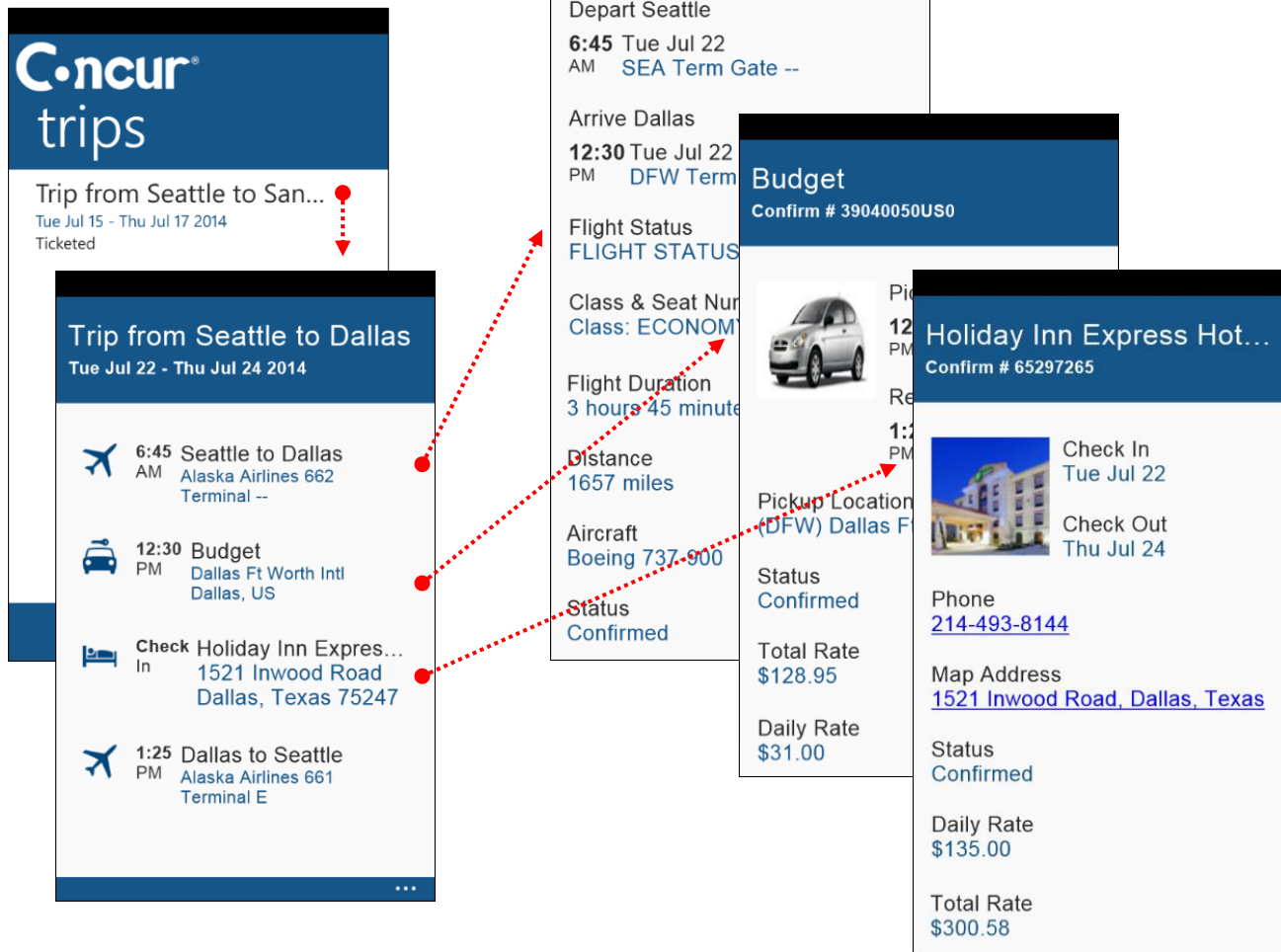
Sign in

Swipe left or right to navigate between the main screens.



View an Itinerary

On the **trips** screen, tap a trip to view the itinerary. Tap each segment to view the details.



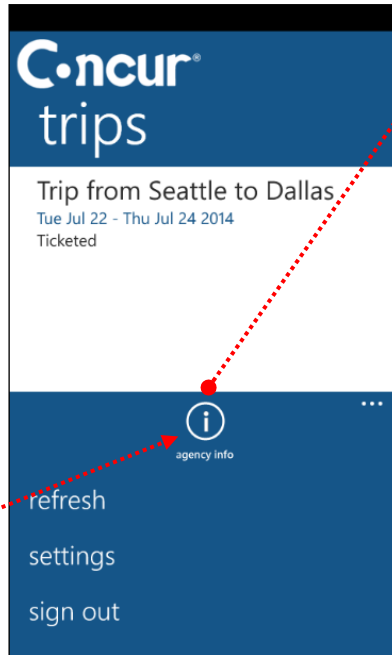
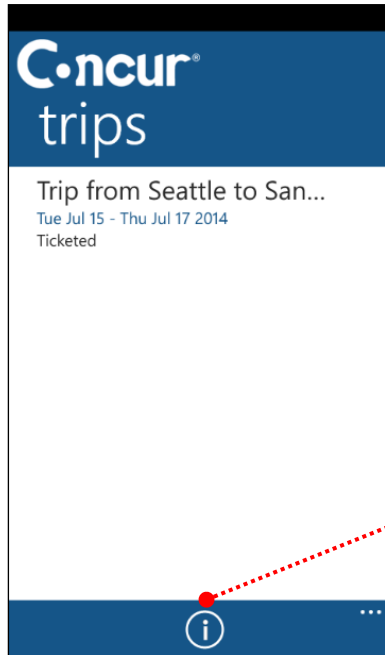
Approve a Trip

If you are a trip approver, tap the desired trip. Tap each segment to view the details. When ready, tap **approve** or **reject**.



View Agency Information

You can access your agency information, such as hours, phone numbers, and web site information.



Agency Info

Agency Name
Concur Travel

Daytime Message
Agency Hours:

- Monday - Friday 6:00 am - 10:00 pm EST
- Saturday: 9:00 am - 5:00 pm CST

Phone: 888-662-6248

- Press '1' for Cliqbook Technical Support
- Press '2' for Assistance from a Travel Associate


After-Hours Service: ~~888-662-6248~~ Press '2' and Follow Instructions on Voice Prompt
Please provide our agents with this code - Psuedo City Code: AC4I

Daytime Phone
[444.444.4545](tel:444.444.4545)





Night Phone
[555.555.5959](tel:555.555.5959)



View Expenses

On the **expenses** screen:


- Mobile expenses:** You can create, edit, and view mobile expenses.
- Card charges:** You can view your card charges (with the  icon). If you are allowed to edit card charges on the web version of Concur, then you can do the same here.

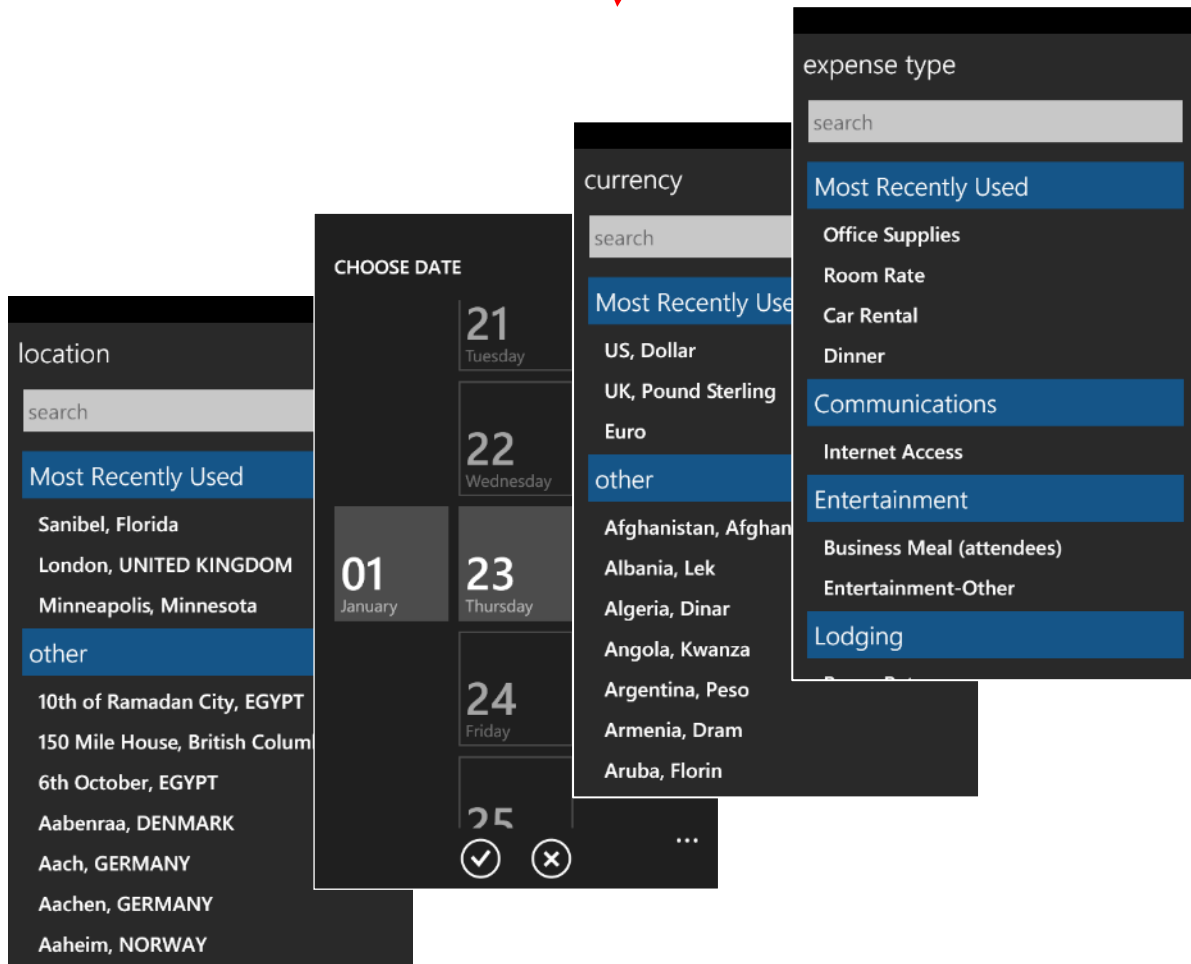
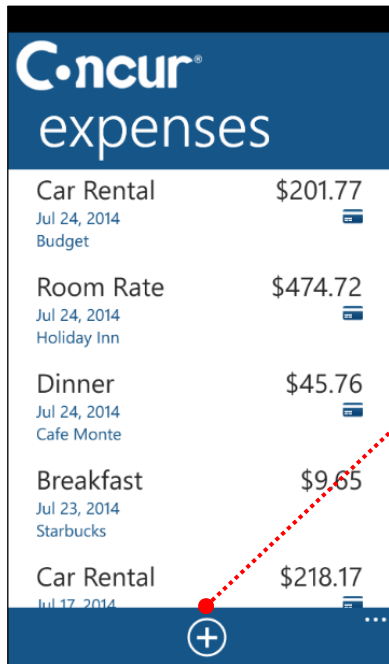
Concur expenses

Car Rental	\$201.77
Jul 24, 2014	
Budget	
Room Rate	\$474.72
Jul 24, 2014	
Holiday Inn	
Dinner	\$45.76
Jul 24, 2014	
Cafe Monte	
Breakfast	\$9.65
Jul 23, 2014	
Starbucks	
Car Rental	\$218.17
Jul 17, 2014	

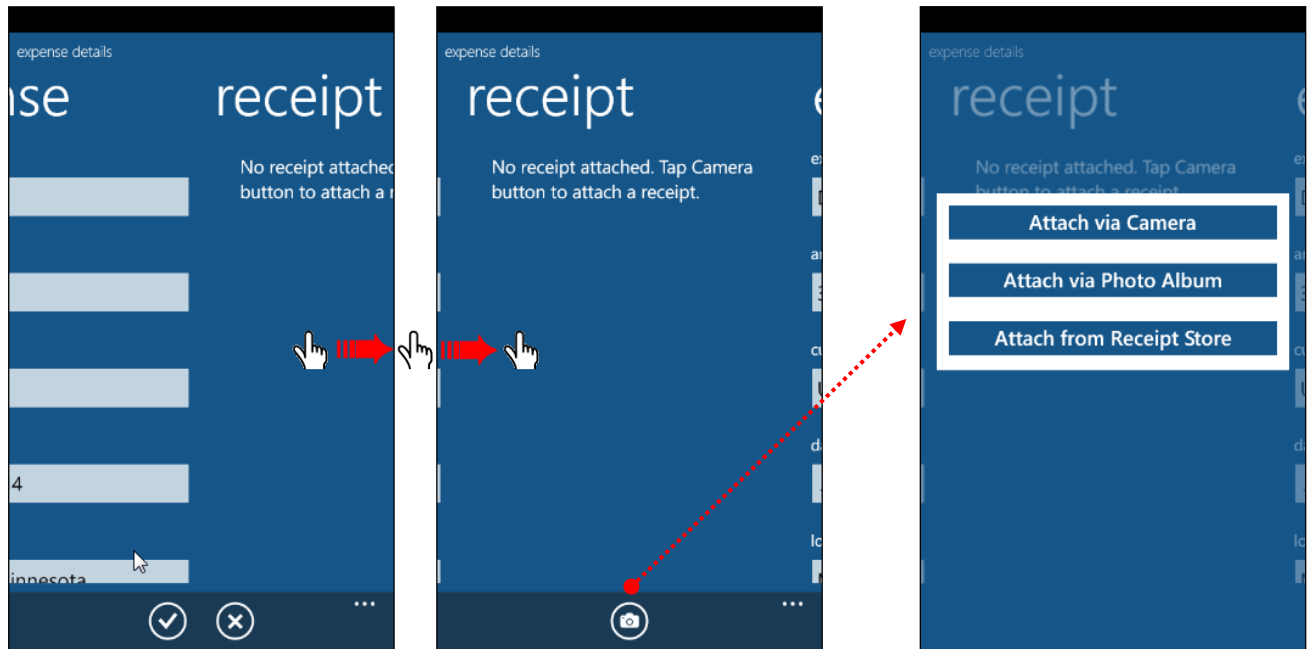
 

Create a Mobile Expense

On the expenses screen, tap  to create a mobile expense.



Then, to add a receipt image, sweep to the **receipt** screen. Tap .



Then, take a picture of the receipt, select an image in your photo album, or – as shown here – select an image from the receipt store.

