SAP Concur Checklist - Getting Started

Below is a checklist to help you get setup on SAP Concur

If not already logged in, go to https://www.chapman.edu/concur and click "Login to Concur" button

Email Verification

Go to Profile > Profile Settings > Personal Information

In the email section, verify your Chapman University email address. A valid email address gives Concur the ability to associate receipt information forwarded from your email address to your Concur account. These receipts will be available in the Receipts Gallery

Travel Profile Setup

Go to Profile > Profile Settings > Personal Information

Review your information and confirm that your name is correct and that it matches your travel documents

Ensure at least two telephone numbers are included in your profile

Update the Emergency Contact section

Add Travel Preferences, Rewards Programs, and unused flight tickets/credits

Add Known Traveler No.

Add Passport Information

Assign Travel Arrangers

Add Credit Card information

Mobile App Registration/Setup

Go to Profile > Profile Settings > Concur Mobile Registration

Register for Concur Mobile

Go to App Center

Download SAP Concur Mobile and TripIt Pro on your smartphone

Delegation

Go to Profile > Profile Settings > Expense Delegates

Review existing delegates and add additional delegates if needed

Alerts/Notifications

Go to SAP Concur Home Screen > Alerts

Sign up to receive e-receipts. You must do sign up for yourself. Your delegate cannot do this for you. □ Sign up for TripIt Pro. If you already use TripIt, upgrade your existing account to TripIt Pro.

Note and keep the following emails handy

1. receipts@concur.com – forward digital receipts to this address so they are added to your receipt gallery for easy attachment to the expense line item

2. plans@tripit.com – forward trip confirmations (booked outside of Concur) to this address so they are included in Concur for expensing and included in TripIt Pro itinerarie