

Adding JP Morgan Expenses

Objective: Explain how to move JP Morgan Expenses into an Expense Report

1. After you make a purchase with your JPMorgan travel card, it will auto feed into Concur within a few days of purchase. Expenses can be found in the *Available Expenses* Task Box on the Concur home page, as well as the *Available Expenses* section of the *Manage Expenses* page.

COMPANY NOTES

[Concur Training Toolkit](#)
This link will provide information to utilise the Concur Expense System.


TASKS

- 02 Open Requests →
- 02 Available Expenses →**
- 00 Open Reports →

Manage Expenses View Transactions

Manage Expenses

ACTIVE REPORTS Report Library →

 **CREATE NEW REPORT**

THERE ARE NO ACTIVE EXPENSE REPORTS.
Click **Create New Report** to create a new report.

AVAILABLE EXPENSES

All Cards ▾ Move Match Unmatch Delete

<input type="checkbox"/> Expense Detail	Expense Type	Source	Date ▲	Amount
<input type="checkbox"/> Independent	Lodging		01/15/2018	\$329.43
<input type="checkbox"/> United Airlines 800-932-2732, TX	Airfare		05/11/2018	\$490.23

Enable Expense Assistant and these expenses will be placed on a report for you. [Learn More](#)

- To add an expense to a report, **click** on the expense, **go to** the *Move* dropdown and **select** *To New Report*. If you already have an existing report that you want the expense to be a part of, you will have the option to move it to the existing report as well.

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- Add** a request to your expense report by clicking *Add* in the *Requests* tab.

Requests

<input type="checkbox"/> Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining

- Find** your submitted request from the list, **select** it and **click** *Add* to add it the expense report. Once it is added, to remove it, **select** it and **click** *Remove*.

Available Requests

<input type="checkbox"/> Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remain...
<input type="checkbox"/> ML Domestic Only	36RH	No	\$1,443.50	\$1,343.50	\$693.50
<input checked="" type="checkbox"/> testpersonal	36PV	No	\$300.00	\$300.00	\$-100.00
<input type="checkbox"/> Workflow Test R...	36PT	No	\$200.00	\$200.00	\$100.00

- Once added to a report, **complete** the expense report as normal and **submit**. For further information, **see** the Quick Start Guide on [Creating an Expense Report \(Detailed\)](#).

For Admins:

- Any expense you purchase with the JPMorgan card will be auto fed into your account, not the Sponsor Guest's. You will create a report in your profile for the JPMorgan charges, and the traveler will create a report in their profile for any other expenses.
- When using the travel card for booking Sponsored Guest expenses, be sure to attach the Invitation Letter to the report.
- Make sure expenses for different Guests or trips are separated into separate expense reports.