Adding JP Morgan Expenses

**Objective:** Outline the steps on how to move JP Morgan expenses into an Expense Report

1. After you make a purchase with your JPMorgan travel card, the transaction will automatically appear in Concur within a few days. You can find these expenses in the *Available Expenses* Task Box (Figure 1) on the Concur home page and in the *Available Expenses* section of the Manage Expenses page (Figure 2).
2. To add an expense to a report, click on the expense, then click on Move dropdown menu and select To New Report. If you have an existing report that you want to add this expense to, you will also have the option to move the expense to that existing report from the same dropdown menu.

3. On the Create New Report screen, click the Create From an Approved Request option. This will allow you to link an existing approved travel request to your new expense report.

4. Click on Create From an Approved Request.
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5. At this point, you should see an 'Available Request' window appear. In this window, locate and select the travel request that corresponds to the travel card expenses you want to include in your expense report. Then click on Create Report.

6. After adding expenses to a report, Concur will display an Alert indicating that the report header is missing a trip type. To address this alert, click on View, which will open the Report Header screen.
7. Once the Report Header screen is open, choose the applicable Trip Type from the options provided, then click Save to confirm your selection.

Upon successfully selecting the trip type and saving, Concur will confirm that you have resolved the alert.

8. Proceed to complete the expense report as usual and submit it.
For Administrators

- All purchases made with the JPMorgan card will automatically appear in your account, not the sponsored guest’s. This ensures clear separation of expenses. You will be responsible for creating an expense report in your profile for all JPMorgan card charges. The traveler will create a separate report for any expenses not covered by the JPMorgan card.

- If you use the JPMorgan card for sponsored guest expenses, remember to attach a copy of the invitation letter to the expense report.

- Ensure that expenses for different Guests or trips are separated into individual expense reports.