

How to add US Bank Card Charges to an Expense Report

This Quick Reference Guide demonstrates how to add credit card transactions from Boston University's corporate paid and billed business and travel expense credit card (US Bank Visa) to your Concur Expense Report.

Your US Bank credit card transactions are highlighted on your Concur homepage in the **Available Expenses** section:

Credit card transactions also appear in under the **Expense** tab:

Expense Detail	Expense	Source	Date	Amount
<input type="checkbox"/> UBER TECHNOLOGIES INC 866-576-...	Taxi (513500 - 513700)	☰	05/01/2015	\$17.74
<input type="checkbox"/> UBER 866-576-1039, CA	Taxi (513500 - 513700)	☰	05/20/2015	\$13.72
<input type="checkbox"/> UBER 866-576-1039, CA	Taxi (513500 - 513700)	☰	05/28/2015	\$10.95
<input type="checkbox"/> UBER TECHNOLOGIES INC 866-576-...	Taxi (513500 - 513700)	☰	06/01/2015	\$6.39
<input type="checkbox"/> UBER 866-576-1039, CA	Taxi (513500 - 513700)	☰	06/11/2015	\$11.24
<input type="checkbox"/> UBER 866-576-1039, CA	Taxi (513500 - 513700)	☰	06/11/2015	\$10.83
<input type="checkbox"/> UBER TECHNOLOGIES INC 866-576-...	Taxi (513500 - 513700)	☰	06/17/2015	\$9.62

*Note: hovering over the blue credit card transaction symbol will give you additional information regarding the charge

1	To move the transactions into a report, select the box beside each available transaction, or to select all available transactions, click the box beside Expense Detail
2	Once the desired transactions are highlighted, select the blue Move button and hit To New Report or To Existing Report if you already have a report in progress.

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

<input checked="" type="checkbox"/> Expense Detail	Expense Type	Source	Date	Amount
<input checked="" type="checkbox"/> VENETIAN/PALAZZO ROOM RSV LAS...	Accommodations (513500, 5...	=	06/27/2015	\$334.88
<input checked="" type="checkbox"/> United Airlines 800-932-2732, TX	Airfare (513500, 513700)	=	06/29/2015	\$1,224.95
<input checked="" type="checkbox"/> United Airlines 800-932-2732, TX	Airfare (513500, 513700)	=	06/30/2015	\$1,097.95
<input checked="" type="checkbox"/> Delta Air Lines DELTA.COM, CA	Airfare (513500, 513700)	=	06/30/2015	\$5,508.80
<input checked="" type="checkbox"/> United Airlines 800-932-2732, TX	Airfare (513500, 513700)	=	07/06/2015	\$582.00

Move ▾
Match
Unmatch
To New Report

If you have already created your Expense Report [Please see the [“How To Start An Expense Report”](#) document if you are having issues with this step] **you can move your card transactions into the report one of two ways:**

1	Scenario 1: your Available Expenses [unassigned US Bank card activity] appear on the right hand side of your expense report screen. If you fall under Scenario 1, skip to Step 3.
2	Scenario 2: If your Available Expenses [unassigned US Bank card activity] do not appear on the right hand side of your expense report screen, click Import Expenses

How to Add Card Transactions

2 Import Expenses

Expenses

Available Receipts

New Expense

Expense * |

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Recently Used Expense Types

Taxi (513500 - 513700)	Car Rental (513500 - 513700)	Hotel Internet Fees (513500 - 513700)	Accommodations (513500 - 513700)
Miscellaneous Travel (513500 - 513700)			

All Expense Types

01. Travel Expenses	..02. Transportation	...04. Office Expenses	...06. Other
Accommodations (513500 - 513700)	Mileage (513500 - 513700)	Printing/Photocopying/Stationery (510030)	Tips/Gratuities (513500 - 513700)
Hotel Internet Fees (513500 - 513700)	Parking/Meters (513500 - 513700)	05. Fees	Consumable Supplies - Facilities Maintenance (510070)
Hotel Phone/Fax (513500 - 513700)	Public Transport (513500 - 513700)	Currency Exchange Fees (513500 - 513700)	Contracted Services - Facilities Maintenance (515560)
Incidentals (513500 - 513700)	Taxi (513500 - 513700)	Passports/Visa Fees (513500 - 513700)	Contracted Services - Rubbish (515581)
Laundry (513500 - 513700)	Tolls/Road Charges (513500 - 513700)	06. Other	Departmental Event Food (511200)
Miscellaneous Travel (513500 - 513700)	Train (513500 - 513700)	Books/Periodicals (513400)	Equipment Rental - Lease (511800)
02. Transportation	03. Meals	Conference Registrations (513900)	Facilities Conference Fees Paid (513940)
Airfare (513500 - 513700)	Business Meals (513500 - 513700)	Materials (510010)	Major Construction Permits - Fees (535172)
Airline Fees (513500 - 513700)	Individual Meals (513500 - 513700)	Meetings (513910)	Permits (535170)
Car Rental (513500 - 513700)	04. Office Expenses	Non Reimbursable/Personal Expense (140400)	Routine Permits Inspections - Fees (535171)
Fuel (513500 - 513700)	Office Supplies (510030)	Professional Subscriptions/Dues (513940)	Unclassified Expense - Facilities Only (519999)

This will bring up all unassigned US Bank card activity

How to Add Card Transactions

1 Available Expenses

Expense Detail	Expense	Source	Date	Amount
<input type="checkbox"/> UBER TECHNOLOGIES INC 866-576-1039, CA	Taxi (513500 - 513700)		05/01/2015	\$17.74
<input type="checkbox"/> UBER 866-576-1039, CA	Taxi (513500 - 513700)		05/20/2015	\$13.72
<input type="checkbox"/> UBER 866-576-1039, CA	Taxi (513500 - 513700)		05/28/2015	\$10.95
<input type="checkbox"/> UBER TECHNOLOGIES INC 866-576-1039, CA	Taxi (513500 - 513700)		06/01/2015	\$6.39
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|----------|---|
| 3 | Select the expenses under the Available Expenses that you would like to use in your report |
| 4 | Select the Move drop down box, and click To Current Report . The selected charges have now been added to your report. |

Available Expenses

3

4

Expense Detail	Expense	Source	Date	Amount
<input checked="" type="checkbox"/> UBER TECHNOLOGIES INC 866-576-1039, CA	Business Meals (513500, 513700)		05/01/2015	\$17.74
<input type="checkbox"/> UBER 866-576-1039, CA	Taxi (513500, 513700)		05/28/2015	\$10.95
<input type="checkbox"/> UBER 866-576-1039, CA	Taxi (513500, 513700)		05/20/2015	\$13.72

Expenses

05/01/2015 Business Meals (513500, 513700) UBER TECHNOLOGIES INC \$17.74

Available Expenses

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<input type="checkbox"/> UBER 866-576-1039, CA	Taxi (513500, 513700)		06/11/2015	\$11.24
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