

Multi-Edit Transactions

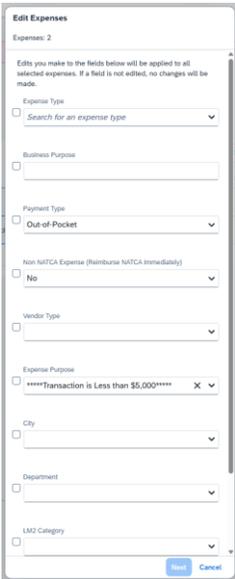
You can select multiple expenses in an expense report and configure common elements across all lines at once.

In the Report window, select two or more expenses and click the **Edit** button.



<input checked="" type="checkbox"/>	Alerts↑	Receipt↑	Payment Type↑	Expense Type↑	Vendor Name↑	Transaction Date↑	Business Purpose↑	Department↑	LM2 Category↑	Date↑	Requested↑	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out-of-Pocket	Hotel		05/29/2025				05/29/2025	\$500.00	...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Out-of-Pocket	Individual Meals (Breakfast/Lunch/Dinner)	Restaurant	05/29/2025				05/29/2025	\$40.00	...
											\$540.00	

The common fields for the selected Expense Type(s) will be displayed and be editable on the **Edit Expenses** page.



Edit Expenses

Expense: 2

Edits you make to the fields below will be applied to all selected expenses. If a field is not edited, no changes will be made.

Expense Type
 Search for an expense type

Business Purpose

Payment Type
 Out-of-Pocket

Non-NATCA Expense (Reimburse NATCA Immediately)
 No

Vendor Type

Expense Purpose
 *****Transaction is Less than \$5,000***** X

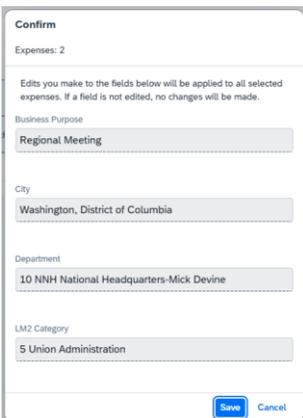
City

Department

LM2 Category

Save Cancel

A confirmation dialog box appears, showing which field(s) will be updated.



Confirm

Expense: 2

Edits you make to the fields below will be applied to all selected expenses. If a field is not edited, no changes will be made.

Business Purpose
Regional Meeting

City
Washington, District of Columbia

Department
10 NNH National Headquarters-Mick Devine

LM2 Category
5 Union Administration

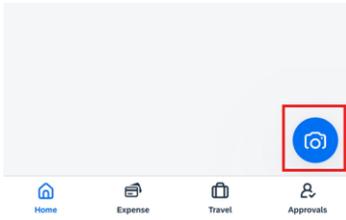
Save Cancel

Concur App

With the Concur app, you can manage your expense reports on your mobile phone as well. By using the app, you can take pictures of receipts in the Concur app and easily move receipts to your expense report. To download, search for SAP Concur in the app store, and click the icon below.



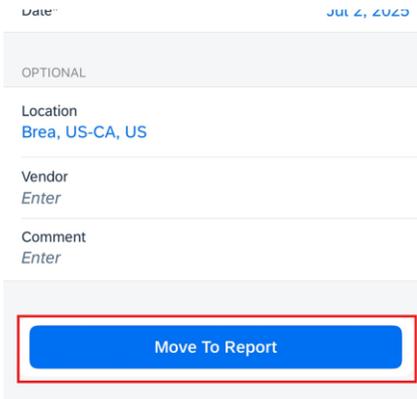
To upload a receipt to your profile on the Concur app, use the “Receipt Camera” icon in the lower right corner of the screen.



Select Allow to give access to your camera for capturing images within the app.

Once the image has been captured press **Done** to add it to your available expenses.

To add the expense to a report, click on the transaction, and select **Move To Report** at the bottom of the screen, and select the report to add the transaction to.



Uber/Lyft Expense Type

To simplify the reimbursement process for Uber/Lyft transactions, Expense Types “Uber/Lyft (Individual)” and “Uber/Lyft (Group)” have been added as options. These Expense Types do not need to have “To” and “From” locations manually entered. However, Uber/Lyft receipts attached to a transaction must have the “To” and “From” information included.

Linking Uber Account

Users can link their Uber account to their Concur account. Once this link is completed, Trip receipts will automatically be sent to Concur Expense. It is still your responsibility to verify the receipt, and submit the expense.

To link your account, in the menu at the top of the desktop screen, select, “App Center”. Search for Uber in the search box at the top of the screen. (Uber should also show up as a Popular User Connection) Click the Uber link, then connect in the next screen.

Receipts@expenseit.com

Users can import transaction receipts to their Concur profile via email. Be guided by the steps below.

To be able to email receipts to Concur, you will first need to have your email address verified on your Concur Profile. To verify your email address:

1. Click the Profile icon near the upper right corner of the home screen.
2. Select **Profile Settings**.
3. On the left-hand side of the screen under Your Information, click **Email Addresses**.
4. Click the **Verify** link. This will trigger the system to send a verification email to the inbox of the address you are verifying.
5. Check your email inbox for an email from **concur.com** with the Subject Line: **Email Verification from Concur Solutions**.
6. Open the email.
7. The email will contain a verification code specific to this email address. Copy the verification code.
8. Navigate back to **Email Addresses** section of your profile.
9. You will now see a field labeled **Enter Code**. Paste the copied code into this field.
10. Under Verify click **OK**.

Important: If you do not receive the verification email, check your Junk or Spam folder.

Once your email address is verified, you can forward your receipts to receipts@expenseit.com. Your receipts will show up in the **Available Receipts** section under the Expense tab. (Receipts can be attachments, or in the body of the email.)

Miscellaneous Concur Reminders

1. **A specific Business Purpose must be included for each transaction.** “Meal” or “Travel” is too vague. For example, “NATCA in Washington”, “NSO Regional Meeting” or “Meeting at the FAA with (name)” are sufficient Business Purposes.
2. **LM category 4 should almost never be used.** Most transactions fit into LM categories 1, 2, 3, and 5. Be guided by LM category descriptions below. Further detail can be found on page 12 of the NATCA National Expense Policy.
 1. Representational: CBA, organizing efforts or recruiting new members
 2. Political Activity: NiW, PAC related or other political activities
 3. Contributions, Gifts: Charitable contributions
 4. General Overhead: This should almost never be used. It is for expenses not allocable to any other category.
 5. Union Administration: NATCA Academy, regional meetings.
3. **For purchases of giveaways individually valued at a T-Shirt or more, you must include names of all recipients along with your receipt.** Broad categories such as “Members” are not sufficient.
4. **Itemized receipts must be submitted.** If a receipt is lost/not provided, please reach out to the vendor to obtain the needed receipt. If unavailable, provide a comment stating that an itemized receipt was not available. Here is the pertinent section from the NATCA National Expense Policy:
 - Itemized receipts for all expenses, including meals, should be submitted if an itemized receipt is provided or available. An itemized receipt is defined as a receipt that accounts for all items, food, drink, and/or services purchased.