



## This step-by-step guide will show you:

- How to raise a 'Request' and an 'Expense' to receive payment using the mobile app

Concur Request is Greene King's solution to manage the spend in pubs for goods and services supplied by local suppliers. A Request is a purchase order to confirm we are accepting the goods/services. This how to guide focuses on a supplier using the Mobile app of the system to create a new Request and Expense to receive payment.

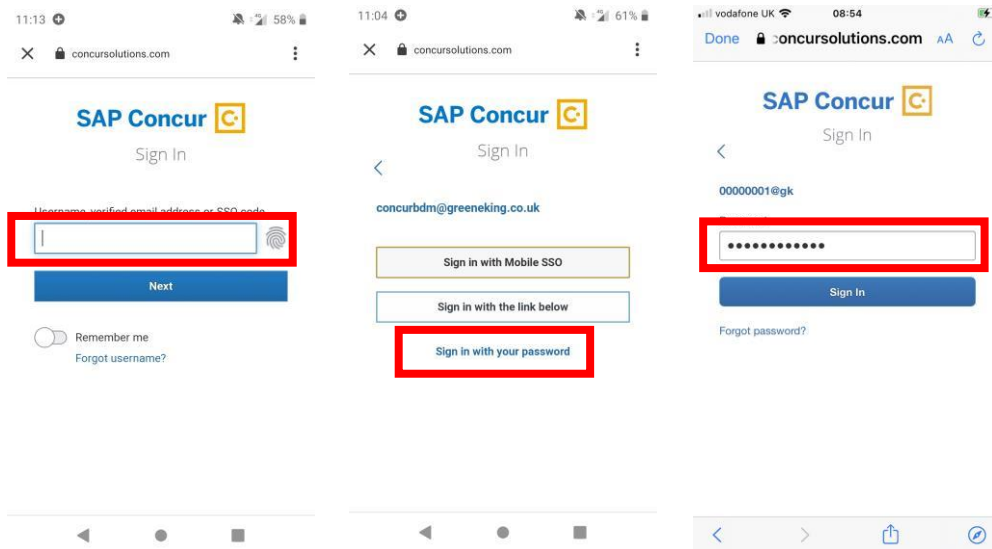
### THE CONCUR REQUEST PROCESS



1

## LOG IN

- Open the Concur App
- Enter your username e.g. your email address and select 'Next'
- Select 'Sign in with password'
- Enter your password and select 'Sign In'

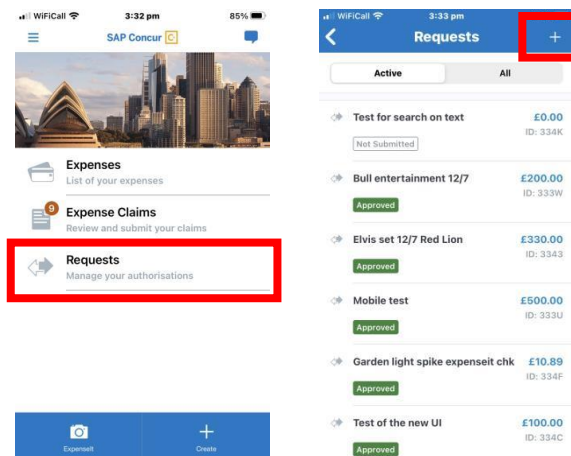


2

## CREATE REQUEST HEADER

A Concur Request is an order, approved ahead of goods and services being provided

- Select '+' then the icon

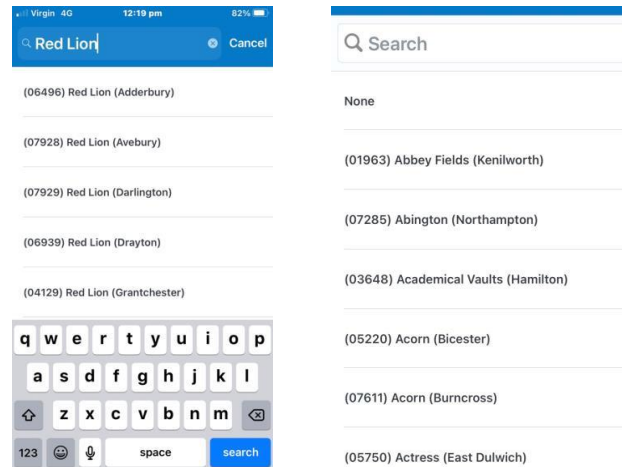


- Enter the details of goods or services to be provided Include the date and pub name or number to aid the organisation of Requests e.g. Window Cleaning Red Lion 07 01

2

## CREATE REQUEST HEADER (CONT.)

- c) Search on pub name and select from the search results You may have a pub name that is used by several pubs such as 'Red Lion' In this instance ensure you utilise the Number and Location as well to make sure you pick the correct pub



- d) Select 'Create'

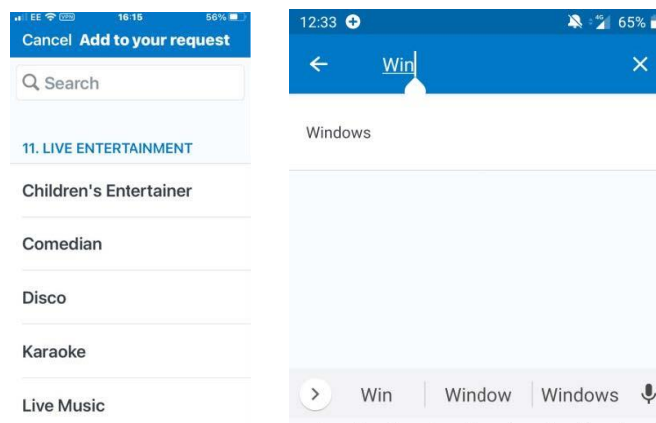
3

## ADD REQUEST LINE

- a) Select the '+' icon



- b) Select the type of service to be provided from the dropdown You can also type the service and the list will be refined based on what you have typed



3

### ADD REQUEST LINE (ONT.

- c) Enter the transaction date as the date services will be provided If your services cover more than one consecutive date, enter the start date
- d) You'll notice that the detail you input in the header has automatically transferred to the 'Business Purpose' of your request line
- e) Enter the amount charged for goods and services in the 'Transaction Amount' section including VAT
- f) Select 'Create' in the top right

- g) To add an additional line repeat bullet points a - f. An example of when you may want to use multiple lines could be if you were providing goods or services to the pub multiple times in a week You might want to raise one request for the full amount for the week but breakdown each day's goods/services into the cost per day

4

### REQUEST SUBMISSION

- a) Select 'Submit' at the bottom of the screen the status of your request will change to 'Submitted Pending Approval'

- b) Your request will be sent to the General Manager of the pub and their Business Development Manager (Area Manager) to approve
- c) Notification emails and the app will help you keep track of the status of your request
- d) **Once your request has been approved, and goods/services to the pub provided, then you MUST turn the Request into an Expense to receive payment**



This page focuses on using the website to upload copies of your invoices to Concur and creating an Expense Claim. **The following steps MUST be completed for you to get paid.**

5

## PREPARING YOUR INVOICE

To ensure your invoice is accepted, please meet the following requirements:

- Unique invoice number
- Your business name and address
- Your VAT number (If applicable)
- Invoice date
- Pub 's name and address
- Description of goods and services
- If you provide a VAT invoice, ensure it is compliant with
- HMRC standards
- Total amount to be paid

You can prepare invoices in advance of creating an Expense claim using the 'Receipt Store' in Concur:

- a) Email a copy of your invoice to [receipts@concur.com](mailto:receipts@concur.com) from your verified email address
- b) Invoices must be one of the following file types:  
PDF, JPG, JPEG, PNG, TIF/TIFF
- c) Your invoice will now be in the 'Available Receipts' section under the Expense tab

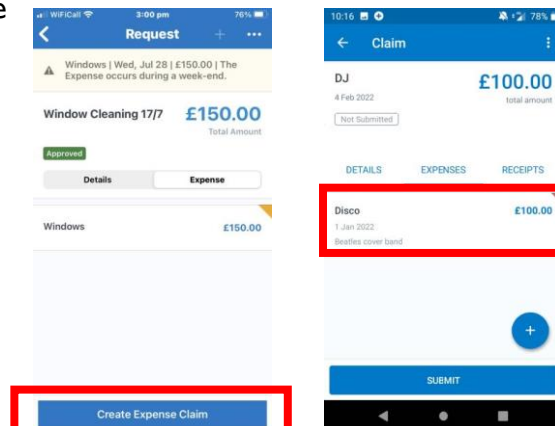
Alternatively, if you would like to attach your invoice at the time you create the Expense Claim you can use your mobile device camera to take a picture of a printed copy

6

## CREATE EXPENSE CLAIM

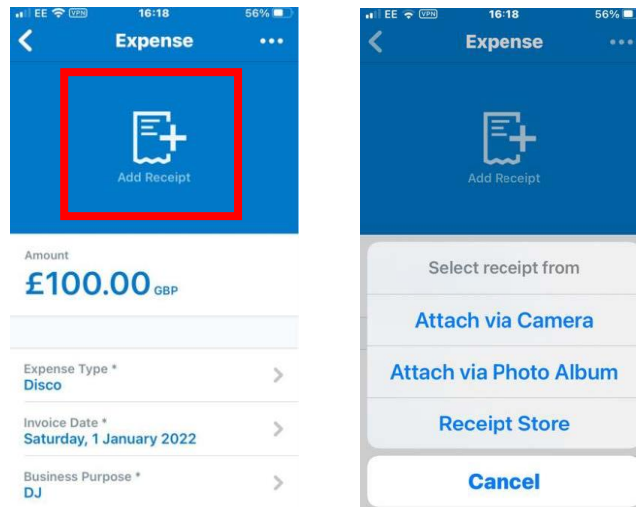
Once you have provided goods or services to the pub, log back into the system (section 1) to create your Expense Claim. An Expense claim must be submitted to receive payment for your services to Greene King, an Expense Claim is where you are invoicing for the works completed.

- a) In the mobile app select 'Request'
- b) Select the 'Request' you would like to turn into an 'Expense Claim'
- c) At the bottom of the screen select 'Create An Expense Claim'
- d) Select the 'Expense' line

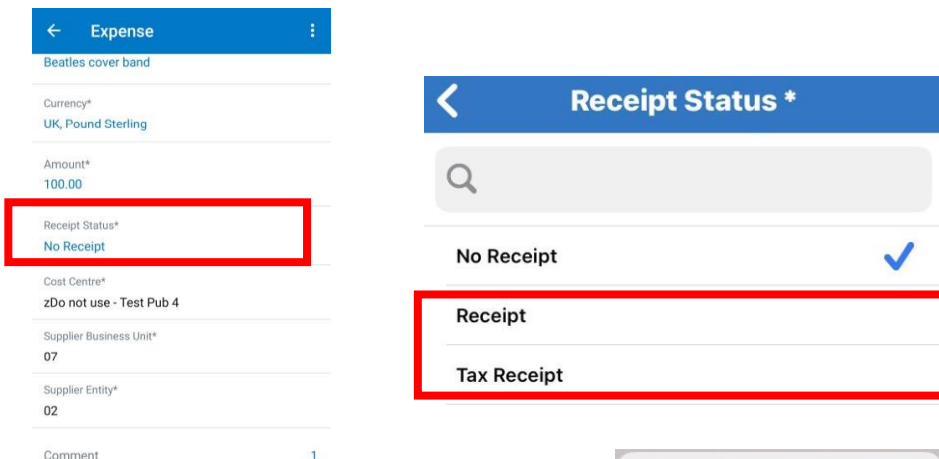


## CREATE EXPENSE CLAIM (CONT.)

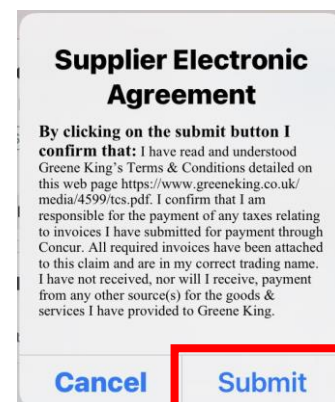
- e) Select 'Add Receipt' and choose your preferred method to add a copy of your invoice. On the mobile app you have the option to take a picture from your phone camera



- f) Ensure your invoice date matches the date on the original request. If not you can amend the 'Invoice Date' field
- g) Amend the 'Receipt Status' to reflect the type of invoice attached i.e. If, VAT registered select 'Tax Receipt', if not, select 'Receipt'



- h) Check all information on the Expense form is correct
- i) If you have a multi line 'Request' repeat steps d - h
- j) Select 'Save' then 'Submit'
- k) Select 'Submit' to confirm that you agree to Greene King's terms and conditions full T&C's can be view on the web address provided
- l) The status of your request will change to 'Submitted & Pending Audit Review'



SUBMITTED

📁 window cleaning @Boathouse... £35.00  
26 Jul 2021

Submitted & Pending Concur Audit Review

## AUDIT & APPROVAL

- a) Once submitted, your Expense claim will be sent to the Concur audit team
- b) The service level agreement is 3 working days
- c) If there is an issue with your Expense claim, the audit team will return your claim to you advising why, so you can amend and re-submit
- d) If approved by Audit, the General Manager of the pub will then need to approve
- e) Notification emails and the app will help you keep track of the status of your Expense claim
- f) Once fully approved, payment takes 3 to 4 working days
- g) You will receive a notification email advising when payment has been processed with a projected payment date



Expense Pay has arranged payment for your expense report

Report Name:	Survey Monkey 2021
Report ID:	C8010A956028437A9E02
Amount Due to Employee:	384.00 GBP
Projected Payment Date:	18/05/2021

**Link To Expense:**  
<https://eu1.concursolutions.com>



- **Once your Request has been approved and goods/services have been provided to the pub, then you MUST turn the Request into an Expense to receive payment**
- Only submit requests for goods or services previously agreed with the General Manager verbally or in writing
- To ensure timely payment, create your Requests a minimum of one week ahead of services being provided to allow time for them to be approved
- Make use of the 'Remember me' box on the log in screen
- There are several pubs with the same name, please ensure you select the correct one based on their number, name or location
- To avoid your claim being returned, ensure you choose the correct expense type
- To use the 'Receipts Store' you must have verified your email address, see the Getting Started guide for more information
- Ensure your invoice date matches the date on the original Request
- To ensure timely payment, draft your Expense claims in advance of services being provided and submit as soon as possible afterward
- To check the payment date of an invoice, you have to use the Web version and then go into the Expense claim you'd like to check, followed by the Claim details and then in Claim payments you will see the estimated payment date
- If you would prefer you can carry out all actions on the web version here is the link

<https://www.concursolutions.com/nui/signin>





For training issues and support with the system please contact Concur Support...



### PHONE NUMBERS

01284 843240



### EMAIL ADDRESSES

[concurrequest@greeneking.co.uk](mailto:concurrequest@greeneking.co.uk)

I Need Help With...	Support Resource	Contact Details
Requesting a new Concur account	Pub General Manager	Contact pub directly
My request/claim hasn't been approved	Pub General Manager	Contact pub directly
I have another problem with the system	Concur Support Team	01284 843240 <a href="mailto:concurrequest@greeneking.co.uk">concurrequest@greeneking.co.uk</a>