SAP Concur

SUPPLIER USER GUIDE (WEB)

This step-by-step guide will show you:
- How to raise a 'Request' and an 'Expense' to receive payment using the **web version** of the system

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

Supplier Create Request

This is a purchase order to confirm we are accepting the service

General Manager Authorises

All requests require the General Manager pre-authorisation.

Business Development Manager Authorises

All requests require the BDM pre-authorisation.

Concur Audit (3 working days)

Audit checks to ensure invoice details are HMRC compliant.

Supplier Creates Expense

Supplier turns the 'Request' into an 'Expense' and attaches invoice image

Supplier Provides Goods/ Services

Supplier completes the work or provides the goods as agreed

General Manager approves Expense

General Manager confirms goods/services have been provided.

Supplier Payment

Suppliers paid directly into their bank account in 3 to 4 working days.

1

LOG IN

a) Open https//www concursolutions.com/nui/signin in your web browser
b) Enter your username e.g. your email address and select '
c) Select 'Sign in with your password'
d) Enter your password and select 'Sign In'

2

CREATE REQUEST HEADER

A Request is an order, approved ahead of goods and services being provided to confirm we are accepting the service.

a) Select 'Start a Request' with the icon

b) 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

c) Search on pub name or number and select from the search results
d) Make sure to use the filter drop-down to select from 'Text',' or 'Either' These are for searching by Pub name, number or either, respectively

2

CREATE REQUEST HEADER CONT.

Pub Number, Name and Location (number prefixed with 0) *

▼ ∨ Red Lion

(07930) Red Lion (Poole)
(07931) Red Lion (Portchester)
(07926) Red Lion (Skipton)
(04274) Red Lion (Stevenage)
(07932) Red Lion (Stubbington)
(07933) Red Lion (Todwick)
(09200) Red Lion Hotel (Fareham)

Pub Number, Name and Location (number prefixed with 0) *

▼ ∨ Search by Code

Text
Code
Either

Pub Number, Name and Location (number prefixed with 0) *

▼ ∨ 7933

(07933) Red Lion (Todwick)

e) Select 'Create'

Cancel   **Create**

3

ADD REQUEST LINE

a) Select 'Add'
b) Choose the type of service (expense type) to be provided

SAP Concur [C]   Requests   Expense   App Centre

Support | Help ▾
Profile ▾ 👤

Manage Requests

Test £0.00 🗑
Not Submitted | Request ID: 4JN7

Submit Request

Request Details ∨   Print ∨   Attachments ∨

EXPECTED EXPENSES

Add ∨   Edit   Allocate   Delete

Search for an expense type   Date ≡   Amount ↑↓   Requested ↑↓

∧ 11. Live Entertainment
Children's Entertainer
Comedian
Disco
Karaoke

3 ADD REQUEST LINE CONT.

c) You can select from the drop down list (as shown above) or start typing your expense type and it will narrow the list down for you

d) Enter the transaction date as the date services will be provided If your services cover more than one consecutive date, enter the start date

e) You'll notice that the detail you input in the header has automatically transferred to the 'Business Purpose' of your request line
f) Enter the amount charged for goods and services in the 'Transaction Amount' section including VAT
g) Select ' in the top or bottom right
h) To add an additional line repeat bullet points a-g. 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 Request' at the top right of the screen the status of your request will change to 'Submitted Pending Approval'

4 REQUEST SUBMISSION CONT.

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 will help you keep track of the status of your request
d) **Once your request has been approved, goods/services have been provided to the pub and then you MUST turn the Request into an Expense to receive payment**

> ☐ The following steps focus 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 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

You can also save the Invoice on your PC (as below) and then upload it when creating your expense claim (covered in the next section)
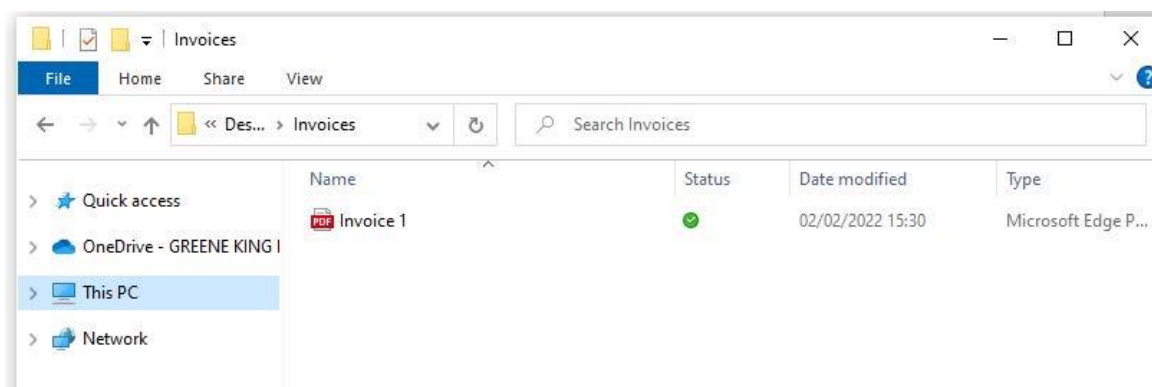

You can also take a picture of your receipt directly using the mobile app. Please visit our Mobile guide (Section 6) to see how

CREATE EXPENSE CLAIM

Once you have provided goods or services to the pub, log back into the system (see 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) On the homepage select 'Requests'
b) Select the Request you would like to turn into an Expense claim
c) At the top right of the screen select 'Create Expense Claim'
d) Tick the box on the 'Expense' line

e) Select 'Edit' and then to add a copy of your invoice select 'Attach Receipt Image' on the right
f) Either select from the bank of previously uploaded receipts or select 'Upload Receipt Image' and select
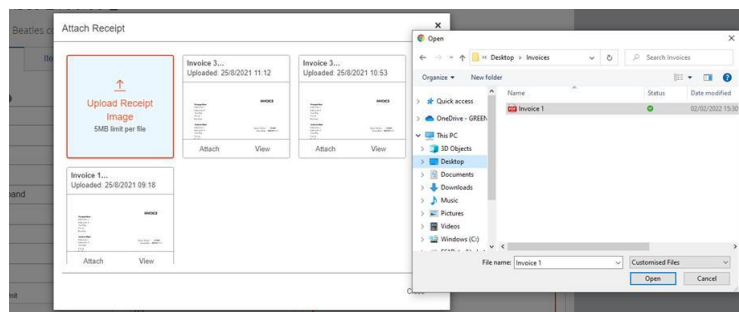
g) Ensure your invoice date matches the date on the original request. If not you can amend the 'Invoice Date' field
h) Amend the 'Receipt Status' to reflect the type of invoice attached i.e. If, VAT registered select 'Tax Receipt', if not, then select 'Receipt'

i) Check all information on the Expense form is correct
j) If you have a multi-line Request repeat steps d - i

6 CREATE EXPENSE CLAIM CONT.

k) Select 'Save Expense' then 'Submit Claim'

l) Select 'Accept & Continue' to confirm that you agree to Greene King's terms and conditions full T&C's can be view on the web address provided
m) You will then get a pop up with a summary of your claim, if you are happy with the information select 'Submit Claim'
n) The status of your request will change to 'Submitted & Pending Concur Audit Review'

7 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 resubmit
d) If approved by Audit, the General Manager of the pub will then need to approve
e) Notification emails 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 you when payment has been processed with a projected payment date

- **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 at the point you agreed on them with the General Manager ahead of services being provided to allow time for them to be approved
- 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
- If you would prefer you can carry out all the actions on the mobile app see mobile guide
- 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 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

SAP Concur C.

RESOURCES AND FURTHER INFORMATION

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

PHONE NUMBERS

01284 843240

EMAIL ADDRESSES

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 concurrequest@greeneking.co.uk