Concur Invoice
Frequently-Asked Questions

Q: ***A payment request that I submitted has been sent back to me. What should I do now?***

A: Payment requests that are sent back will always have an explanation in the comments telling you why the request cannot be processed. To view the comments, open the payment request and select "Details" then "Comments".

Q: ***I received an email that says a payment request has been assigned to me. What does this mean?***

A: When a payment request is assigned to you, it means that an invoice has been routed to your queue for submission. The basic details have been filled out for you and the image has been attached. The next step is to provide a budget code and explanation for a confirming order if applicable.

> ***NOTE:*** A/P will do its best to assign an invoice to the employee responsible for placing the order. If that person cannot be determined, A/P will assign the invoice to the secretary or head administrative staff in the department that placed the order.

Q: ***I submitted a payment request but realized I need to make a correction. Can I still make changes?***

A: Yes. If you submit a payment request and realize that you need to fix something, you can use the "Recall" function to pull the request back for correction. To do this, open the payment request, select "Actions" then "Recall". You can now make any necessary changes and re-submit.

Q: ***When I try to submit a payment request, I receive an error message. How should I proceed?***

A: Concur will automatically identify when a payment request is missing required information/documentation or contains incorrect information. The message will include an instruction on what changes need to be made in order to proceed.

Q: ***I cannot find the correct vendor in the vendor search. How do I create a new one?***

A: If you cannot locate the correct vendor file in the system, first try changing the search criteria from "Vendor Name + Begins with" to "Vendor Name + Contains". If you still cannot find it, select "Request New Vendor". You will need to enter in all required fields and click "Apply" – do not click "OK" yet. You are then required to attach an image to the new vendor request by selecting "Actions" and "Upload Image". This image can be the invoice/supporting documentation or a W-9 if available. You can then click "OK" and proceed with submitting the payment request as usual.

Q: ***I found the right vendor, but the remittance address is wrong. How do I update the vendor?***

A: When a vendor file needs to be updated, follow the "Request New Vendor" steps noted above. The process for updating a vendor is exactly the same as requesting a new one.

Q: ***What happens to my payment request if it does not get approved in a timely manner?***

A: After Accounting reviews a payment request, it will automatically be routed to the appropriate department manager based on the budget code entered. The approval escalation timeline is as follows:

- If a payment request has not been approved within 5 days, the approver receives an email reminder to take action on the pending request(s)
- At 10 days, a second email reminder will be sent to the approver.

- At 15 days, an email reminder will be sent to both the approver and the requesting employee. At this point, it is recommended that the requesting employee contact the approver directly about obtaining approval for the request.
- At 20 days, the approval window expires and the payment request will be sent back to the employee.

Q: Can I delete an image after uploading to the payment request?

A: Yes. Open the payment request, select "Actions" and then "Delete Image".

Q: When I open a payment request, I am not seeing the "Invoice Details" section. Where is it?

A: If you are not seeing the Invoice Details in a new or existing payment request, you may need to adjust the panes on your screen.

Q: When I click "View Invoice", nothing happens. Where is the invoice?

A: Your internet browser may have its pop-up blocker turned on. Add Concursolutions.com to the list of sites with pop-ups allowed.

Q: I am requesting payment for an employee registration at a conference and no invoice number is provided. How can I be sure the conference knows who the payment is for?

A: When completing the invoice details of a Concur Payment Request, be sure to check the box for "Mail Attachments with Check". You also should include the employee's name in the "Remittance Message" box which will print out on the physical check stub.