

Getting started with Concur? These steps will set you up for success.

The Concur Checklist

- Step 1: Complete Your Profile** – This ensures all required fields are filled in as well as the Travel Preferences section. See the [Setting Up Your Concur Profile](#) QRC.
- Step 2: Verify Your Email Address** – This will allow you to forward emailed receipts to receipts@concur.com for ease of attaching to your Expense Reports. See *Concur Step-by-Step Guide– Verifying Your Email Address*.
- Step 3: Assign a Travel Assistant/Arranger** – These individuals can book travel on your behalf and update your profile as needed; you may have more than one travel assistant/arranger. See the [Assigning a Travel Assistant](#) QRC. **Please add department manager and accounting technician.**
- Step 4: Save Your T&E Card to Your Profile** – This will make the booking process faster and allow your Travel Assistant/Arranger to book your travel using your T&E Card (credit card information is redacted for security purposes).
- Step 5: Enable Expense Assistant** – This feature will build expense reports for you either by month or trip dates.

Note: This feature is Only available for T&E Card Accountholders.
- Step 6: Assign a Delegate** – Delegates can assist you in creating your Requests and Expense Reports; you may have more than one delegate. See the [Assigning a Personal Delegate](#) and [Assigning an Approval Delegate](#) QRCs. **Please add department manager and accounting technician.**
- Step 7: Enable E-Receipts** – This will allow Concur’s participating suppliers to send receipts to Concur Expense on your behalf. See *Concur Step-by-Step Guide– Enabling E-Receipts*.
- Step 8: Download the Mobile App** – The mobile app allows you to access Concur on-the-go as well as capture receipt images during your trip. See the [Using the Concur Mobile App](#) QRC.

Have Questions?

If you need further assistance or have additional questions, please email the University Travel Office at concur@unc.edu.