CHANGING EXPENSE TYPES

Overview: When expenses come into Concur, corporate card charges are mapped to expense types based on MCC codes and receipts will map to an expense type based on the information read from the receipt. You may change the expense type as necessary to best reflect the expense and the appropriate G/L account to charge the expense. When a MCC code cannot be read or an expense type is not available in a report, the expense displays as “undefined”, an exception message will display and the expense type needs to be changed to the appropriate expense type.

**Step 1**

**Changing an Undefined Expense Type**

*From Expenses, you will see the Exceptions icon* indicating you must select an expense type for the entry before you can submit the expense report. Check the box next to the expense and select **Edit**.

**Step 2**

*The Expense Details window displays. Select the Expense Type field. Use the drop-down to select the appropriate expense type.*

Questions? Visit Contact Information at concur.duke.edu or email Concur-ExpenseSupport@duke.edu.
**Step 3**

After changing the expense type, add additional information as needed. Complete/validate all required fields (* red asterisks). Select **Save Expense**.

**Step 4**

*Under Expenses*, you will receive a message at the bottom of the screen indicating the expense has been saved. Notice the red exception message has been removed. Next, add the receipt image (if necessary) and continue working with the expense report.

**Questions?** Visit Contact Information at concur.duke.edu or email Concur-ExpenseSupport@duke.edu.
Working with Meal Expenses

**Step 1**

All restaurant charges will map to Entertainment 693200 based upon the MCC. You will need to change the expense to the appropriate expense type. Notice the exception message information that displays at the top of the screen. Click the box to the left of the expense and select **Edit** to change the expense.
**Changing Expense Types**

**Step 2**

*On Expense Detail, in the Expense Type field, select the appropriate meal – breakfast, lunch, dinner – from the drop-down. Complete/validate all required fields (* red asterisks). Select Save Expense.*

**Step 3**

*Under Expenses, you will receive a message at the bottom of the screen indicating the expense has been saved. Notice the Exception message has been removed. Next, add the receipt image (if necessary) and continue working with the expense report.*

For more detailed information on this topic please see the: Changing Expense Types training video at [concur.duke.edu](http://concur.duke.edu).

Questions? Visit Contact Information at concur.duke.edu or email Concur-ExpenseSupport@duke.edu.
Helpful Hints

Recently Used Expense Types

From the Add Expense screen, under the Create New Expense tab, you will see a list of your most recently used expense types to access when creating a new expense.

For more detailed information on this topic please see the: Changing Expense Types training video at concur.duke.edu.

Questions? Visit Contact Information at concur.duke.edu or email Concur-ExpenseSupport@duke.edu.