**Overview:** Corporate card and out-of-pocket expenses where receipts are submitted electronically, must be pulled into an expense report. Individual or groups of expenses can be moved into the report or you can “click and drag” an expense into a report.

### Moving Expenses into a Report

**Step 1**

*From the Expense page, select Import Expenses.*

![Import Expenses screenshot](image1)

**Step 2**

*In the Available Expenses list, select the expense(s) by clicking the check box next to each expense. Select Move. Move will move the expense to the current expense report. Clicking the dropdown will give you an additional option of moving it to a new expense report.*

![Available Expenses screenshot](image2)

**Step 3**

*The expense now displays in Expenses. Check the box next to the expense to open the Expense Detail window and continue working with the expense.*

![Expenses screenshot](image3)

Questions? Visit Contact Information at concur.duke.edu or email Concur-ExpenseSupport@duke.edu.
Click and Drag Expenses into a Report

**Step 1**
From the Expense tab, select **Import Expenses**.

**Step 2**
In the **Available Expenses** screen, highlight the expense(s) in blue and drag it to the Expense section of the screen.

**Step 3**
The expense now displays in Expenses. Check the box next to the expense to open the Expense Detail window and continue working with the expense.

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Helpful Hints

**Sorting in Ascending/Descending Order**

In the **Available Expenses** list, select the column you’d like to sort in ascending/descending order. Look for the black arrow indicating the column currently sorted.

![Available Expenses list with sorting](image)

**Deleting an Expense**

If you accidently pull the wrong expense into your expense report, delete it by checking the box to the left of the expense and selecting **Delete**. This will move the expense back to **Available Receipts**.

![Expense details with delete button](image)

The **Please Confirm** window will display. Select **Yes** to delete the expense from the expense report.

For more detailed information on this topic please see: Pulling Expenses Into a Report training video at [concur.duke.edu](http://concur.duke.edu).

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Helpful Hints

Matching a Receipt and a Corporate Card Charge

In many instances, Concur will automatically match a receipt and a corporate card charge once both are in the system. In the event auto-matching does not occur, the receipt and the corporate card charge will display as separate items in Available Expenses. Source will assist with identifying which one is the corporate card charge and which is the receipt.

From the expense report, select Import Expenses and ensure All Cards are displaying. Select the check box beside both the corporate card charge and the receipt. Select Match to pair the two items. Select Yes in the pop-up window that displays to finalize the matching.

For more detailed information on this topic please see: Pulling Expenses Into a Report training video at concur.duke.edu.

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Helpful Hints

Matching a Receipt and a Corporate Card Charge

Notice that the corporate card charge and the receipt have been matched. Select the check box beside the item and select Move to incorporate it into the expense report.

For more detailed information on this topic please see: Pulling Expenses Into a Report training video at concur.duke.edu.

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