Expense Matching (Smart Expenses)

Smart Expense Steps

If a user captures a receipt with additional detail using their mobile app that matches a corporate credit card transaction, Concur will attempt to match both expenses. If Concur matches two items, they will be presented as one combined item in the user’s Available Expenses and will be marked with 🔄 🔄 icons in the source column.

1. Traveler charges an expense to their Corporate Credit card
2. Traveler captures receipt on their mobile app

3. After loading into Concur, if the type, amount and date of the transaction matches a corporate card expense, Concur will match the two transactions under Available Expenses
Steps to Manually Match a Smart Expense

If Concur does not automatically combine two items that represent the same transaction, they can be matched manually:

1. Click the checkbox of the each expense
2. Click Match
3. The expenses will now show up as one combined line under Available Expenses

Steps to Manually Unmatch a Smart Expense

If Concur combines two items that should not be matched, they can be unmatched manually:

1. Navigate to Available Expenses
2. Click the checkbox of the matched expenses
3. Click the Unmatch button
4. The expenses will now show up as two lines under Available Expenses