Concur Invoice – Instructions on how to create a payment to a vendor.

You will need to access the Concur Invoice system.
Select Create New Invoice and policy Check Request.

On the right hand side Vendor Name...where it says Begins with select Contains in the drop down list. In the next box type in the Vendor name.
Example Landmark. Click the Magnifying glass. Select the Vendor from the list *Example* Landmark Inn.

If the vendor does not come up under vendor list, select the blue button that says Request new vendor. Fill in the Vendor name and address information. Also, include the NMU contact name and phone number of the individual that may be called with questions pertaining to your request. Click OK.

Enter information into the red highlighted boxes. For Invoice Name –you may create a name that describes the transaction. *Exampl*e Landmark-Speaker August 2019; enter Invoice Date; and Amount. Save.
Please enter an Invoice number if you have one available. It is not required but is helpful to flag duplicate invoices for a Vendor.

Note the default org number may be changed in the next step.

Expense Type - Select the code that best matches the expense purpose. *Example* 7192 Professional Services. Enter the Amount. Save.
Line description and 1099 Code are not necessary.

You may now change the Distribution Code if necessary.
In the Itemization Summary - click the box next to the 1 and Edit.

In Distributions - select Add.
The default org number will pre-populate.

You may change it by selecting the drop down arrow under the title Org Start and select Org that begins with a … *Example* Org begins with a 5 if using a grant org number or Org begins with a 3 if you are using a 3 fund org number, etc.

Under Organization...Click the drop down arrow and type in the org number you want to charge and then select the org title and number. You will find your most recently used org numbers at the top of the list. Save.

Attach a copy of the Invoice:
Save the Invoice/receipt onto your computer as a pdf file.
In the Actions drop down, select Upload Image. Browse for the Invoice/receipt you had saved and Upload. Close the Upload Image screen.
Review the completed document then in the upper right hand corner Submit Invoice.