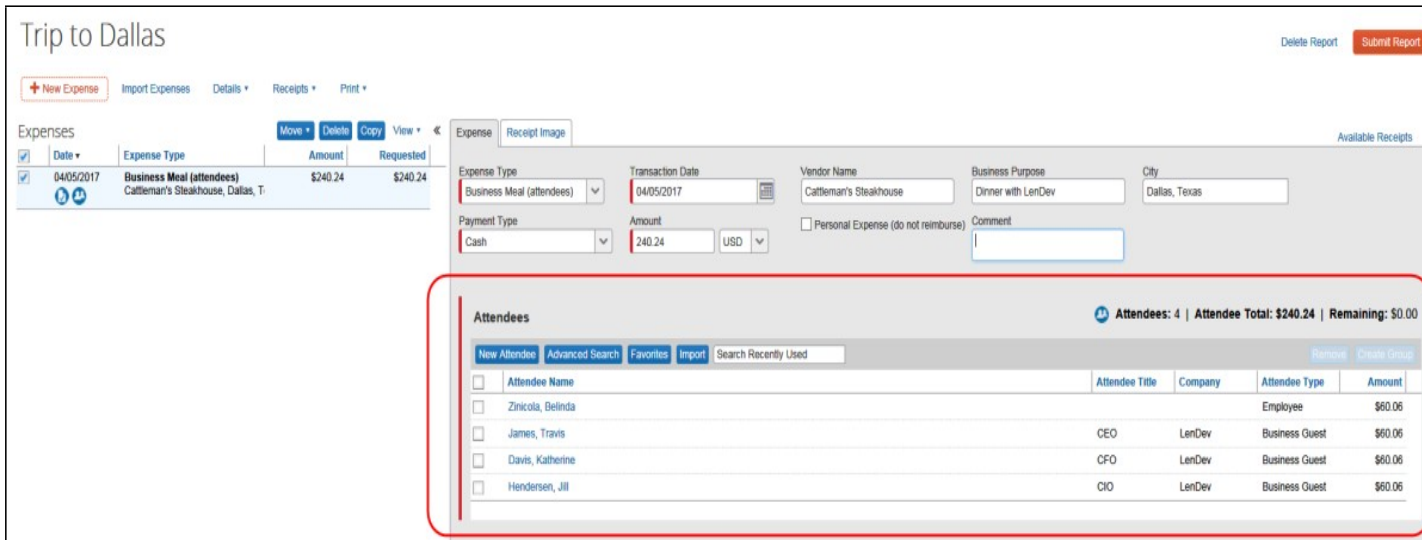


Adding Attendees to a Business Meal or Conference Expense

Attendees are no longer managed on the expense page. They are on a separate page, providing more work space for attendees and making the experience clearer and less confusing.

Previous Concur User Interface

In the previous Concur user interface, the **Attendees** section looked like this.



The screenshot displays the 'Trip to Dallas' expense page. The 'Attendees' section is highlighted with a red box and shows a table with the following data:

Attendee Name	Attendee Title	Company	Attendee Type	Amount
<input type="checkbox"/> Zinicola, Belinda			Employee	\$60.06
<input type="checkbox"/> James, Travis	CEO	LenDev	Business Guest	\$60.06
<input type="checkbox"/> Davis, Katherine	CFO	LenDev	Business Guest	\$60.06
<input type="checkbox"/> Hendersen, Jill	CIO	LenDev	Business Guest	\$60.06

Summary: Attendees: 4 | Attendee Total: \$240.24 | Remaining: \$0.00

NextGen Expense – New User Interface

In NextGen Expense, attendees are managed on a separate page.

Adding Attendees – Typical Process

Complete the expense and then click **Attendees** on the **New Expense** page.

Delete NOTE & align text to left

NOTE Just like the previous user interface, the **Attendees** link appears only for the expense types that your company has defined as requiring Attendees, such as for Business Meals and Conferences or Seminars.

The screenshot shows the 'New Expense' form with the 'Attendees (0)' link highlighted by a red circle. The form includes fields for Expense Type (Business Meals (Attendees)), Transaction Date, Business Purpose, Enter Vendor Name, City, Payment Type (Cash), and Transaction Amount. A receipt preview for Cattleman's Steakhouse is visible on the right.

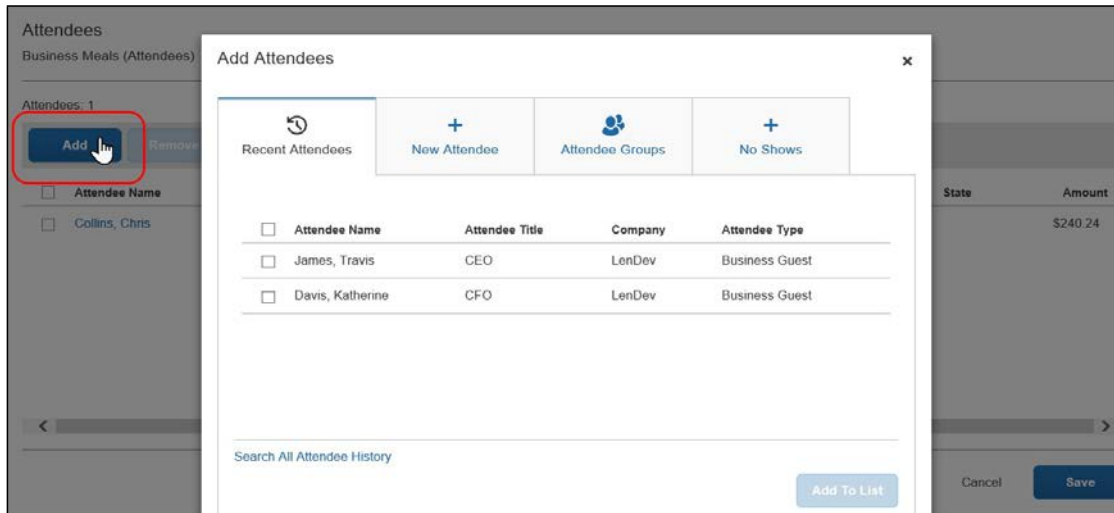
The **Attendees** page appears. **ADD** → Note: The employee name for the report automatically appears as an attendee in the Attendees field. If this is the only attendee for the meal/event, check the name and click **Save**.

The screenshot shows the 'Attendees' page for 'Business Meals (Attendees) | \$240.24'. It displays a table with one attendee:

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	State	Amount
<input type="checkbox"/>	Collins, Chris			This Employee		\$240.24

Buttons for 'Add' and 'Remove' are visible above the table. The 'Save' button is at the bottom right.

To add an attendee to an expense, click **Add**. The **Add Attendees** window appears; all of the options for adding attendees to the expense are available in this window.



You can choose from recent attendees, add a new attendee, choose from attendee groups (and Favorites), or identify no-shows (if your configuration allows).

CHOOSE FROM RECENTLY USED ATTENDEES

A good place to start is with the **Recent Attendees** tab. Select the check box for the desired attendee(s) and then click **Add To List**. The selected attendees will be added to the expense.

Add Attendees ×

Recent Attendees + New Attendee Attendee Groups + No Shows

<input checked="" type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type
<input checked="" type="checkbox"/>	James, Travis	CEO	LenDev	Business Guest
<input checked="" type="checkbox"/>	Davis, Katherine	CFO	LenDev	Business Guest

[Search All Attendee History](#)

[Add To List](#)

At the bottom of the **Recent Attendees** tab is the **Search All Attendee History** link. Click the link to see all attendees you have ever used - regardless of whether they are in your favorites.

CHOOSE FROM YOUR FAVORITES

To search for an attendee that you have designated as a favorite (in Profile) but who is not available on the **Recent Attendees** page, click **Attendee Groups**. The first group is Favorites. Click **Favorites**. The **Favorites** window appears.

Add Attendees

Recent Attendees + New Attendee **Attendee Groups** + No Shows

Favorites (6)

Favorites

Start typing to filter the list below

	Attendee Name ▲	Attendee Title	Company	Attendee Type
<input type="checkbox"/>	Charlston, Trace	Sales manager	LenDev	Business Guest
<input type="checkbox"/>	Collins, Chris			This Employee
<input type="checkbox"/>	Davis, Katherine	CFO	LenDev	Business Guest
<input type="checkbox"/>	Henderson, Jill	CIO	LenDev	Business Guest
<input type="checkbox"/>	James, Travis	CEO	LenDev	Business Guest
<input type="checkbox"/>	Roberts, William	VP Sales	LenDev	Business Guest

Cancel **Add To List**

Select the check box for the desired attendee(s) and then click **Add To List**.

SEARCH FOR OTHER ATTENDEES

In the following example, assume that you want to add an attendee who is not available on the **Recent Attendees** tab or in Favorites. The first step is to search for the desired attendee.

Click **New Attendee**. The **Search for Attendee** window appears.

The image shows a software interface for adding attendees. The main window is titled "Add Attendees" and has a close button (x) in the top right. It features a navigation bar with four tabs: "Recent Attendees" (with a refresh icon), "New Attendee" (with a plus icon and a red box around it), "Attendee Groups" (with a group icon), and "No Shows" (with a plus icon). Below the tabs, there is a list of recent attendees with checkboxes and names: "James, Travis" and "Davis, Katherine". A "Search All Attendee History" link is at the bottom left. A "Search For Attendee" dialog box is open in the foreground, also with a close button (x) in the top right. It contains a search form with the following fields: "Attendee Type" (a dropdown menu with "Business Guest" selected), "Last Name" (text input with "Davis" entered), "First Name" (text input), "Attendee Title" (text input), "Company" (text input), and "State" (text input). A red arrow points from the "New Attendee" button to the dialog box. A legend indicates that an asterisk (*) denotes a required field. At the bottom of the dialog, there is a "Can't find an attendee? Create New Attendee" link, a scrollbar, a "Close" button, and a blue "Search" button.

Select the appropriate attendee type, and enter the search term (for example, the first few letters of the attendee's last name). Click **Search**.

In the search results that appear, select the check box for the desired attendee and then click **Add To List**.

Search For Attendee ✕

Search Criteria: Business Guest, Davis
[Modify Search](#)

Attendee Name	Attendee Title	Company	Attendee Type
<input type="checkbox"/> Davis, Katherine	CFO	LenDev	Business Guest

[Close](#) [Add To List](#)

NOTE: If you do not find the desired attendee in the results, you can click **Modify Search** to modify your search criteria and try again.

CREATE NEW ATTENDEE

If you want to create a new attendee manually (and if you are allowed to by your company's configuration), click **New Attendee > Create New Attendee**.

The image shows a software interface for adding attendees. The main window is titled "Add Attendees" and contains three buttons: "Recent Attendees", "New Attendee", and "Attendee Groups". The "New Attendee" button is highlighted with a red box and a mouse cursor. Below these buttons is a table with columns for "Attendee Name", "Attendee Title", "Company", and "Attendee Type". Two rows are visible: "James, Travis" and "Davis, Katherine". A "Search All Attendee History" link is at the bottom left.

A modal window titled "Search For Attendee" is open, containing the following fields and controls:

- Attendee Type * (dropdown menu, currently set to "Business Guest")
- Last Name (text input, containing "Davis")
- First Name (text input)
- Attendee Title (text input)
- Company (text input)
- State (text input)

A red box highlights the text "Can't find an attendee? [Create New Attendee](#)" at the bottom of the modal. At the bottom right of the modal are "Close" and "Search" buttons.

Complete the **Create New Attendee** window and then click **Create Attendee**.

Create New Attendee
✕

Attendee Type * * Indicates required field

Business Guest
▼

Last Name *

Collier

First Name

Franklin

Attendee Title

Sales Manager

Company

LenDev

State

WA

Project ID

10799
✕

Cancel

Create Attendee

When done, all attendees appear.

Attendees
✕

Business Meals (Attendees) | \$240.24

Attendees: 4

Add

Remove

<input type="checkbox"/>	Attendee Name	Attendee Title	Company	Attendee Type	State	Amount
<input type="checkbox"/>	Davis, Katherine	CFO	LenDev	Business Guest		\$60.06
<input type="checkbox"/>	Henderson, Jill	CIO	LenDev	Business Guest		\$60.06
<input type="checkbox"/>	Collier, Franklin	Sales Manager	LenDev	Business Guest		\$60.06
<input type="checkbox"/>	Collins, Chris			This Employee		\$60.06

<
>

Cancel

Save

Click **Save** to add the attendees to the expense and return to the expense page.

If you click **Cancel**, a message appears. If you then click **Continue Without Saving**, then the newly added or updated attendees on this page will not be saved to the expense.

Manage Duplicate Attendees

When you attempt to add a new attendee and click **Create Attendee** (as described above), Expense immediately searches for duplicates. If Expense finds a duplicate attendee, you are prompted to use the duplicate or to add the new attendee if, in fact, they are not the same person.

Duplicate Attendees Found ✕

New Attendee
Kerry Craig
Business Guest
[Modify Attendee](#) [Continue Adding New Attendee](#)

Duplicates

Attendee Name	Attendee Title	Company	Attendee Type
<input type="radio"/> Craig, Kerry	CFO	LenDev	Business Guest

[Cancel](#) [Add Selected Attendee](#)

=====