

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 shows the 'Trip to Dallas' expense page. The 'Attendees' section is highlighted with a red box and contains the following information:

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

[New Attendee](#) [Advanced Search](#) [Favorites](#) [Import](#) [Remove](#) [Create Default](#)

<input type="checkbox"/>	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

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.

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.

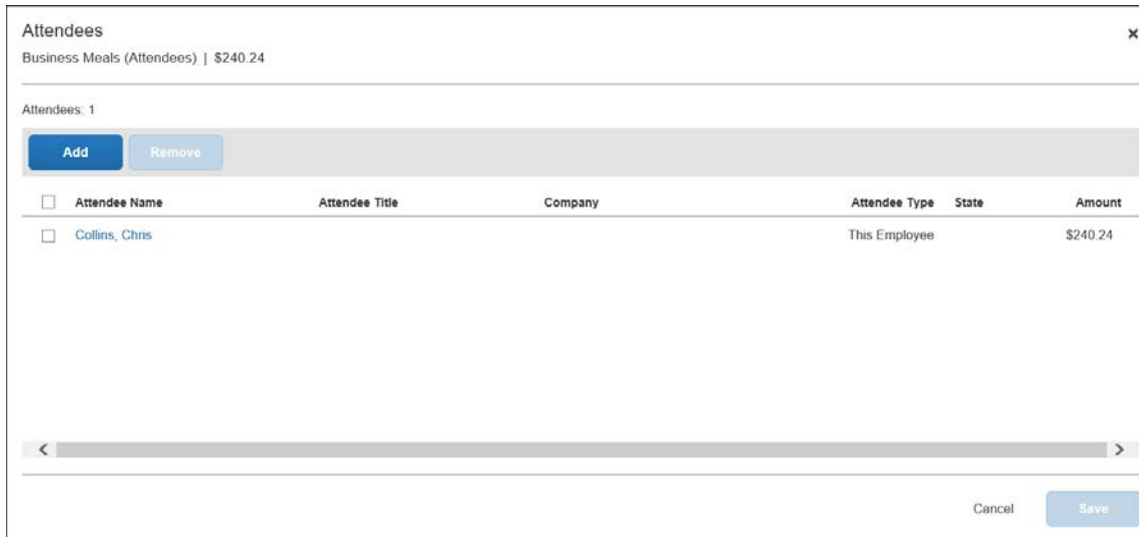
The screenshot shows the 'New Expense' form with the following details:

- Expense Type:** Business Meals (Attendees)
- Transaction Date:** MM/DD/YYYY
- Business Purpose:** (empty field)
- Enter Vendor Name:** (empty field)
- City:** (empty field with a globe icon)
- Payment Type:** Cash
- Transaction Amount:** (empty field)
- Currency:** (empty field)

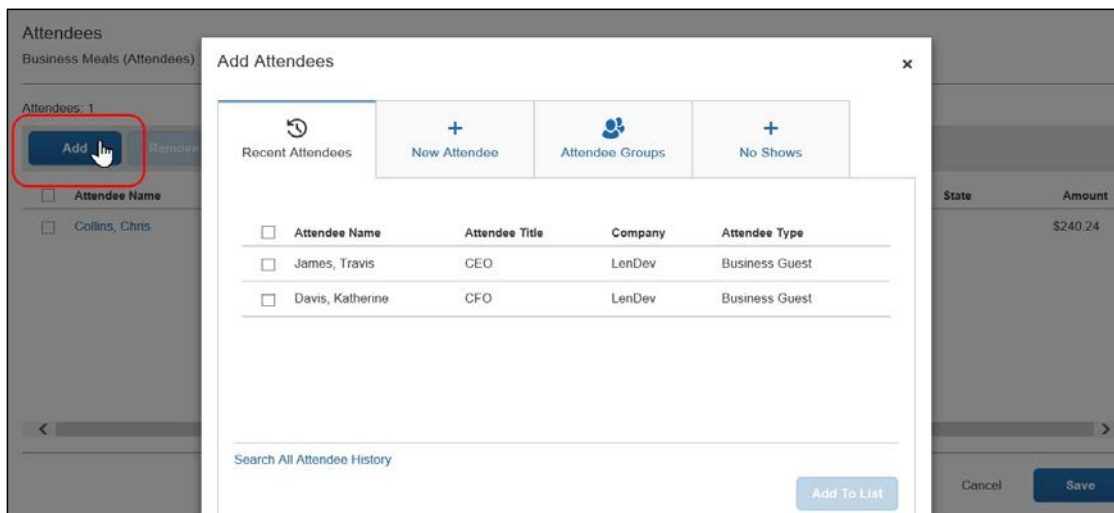
The receipt preview on the right shows the following items:

Cattleman's Steakhouse 100 Rancho Del Gato Dallas Texas	
April 5 2017	
Prime Rib sm	32.00
Prime Rib lg	42.00
Prime Rib lg	42.00
New York Steak.....	18.00
Dessert	9.50
Dessert	9.75

The **Attendees** page appears. 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**.



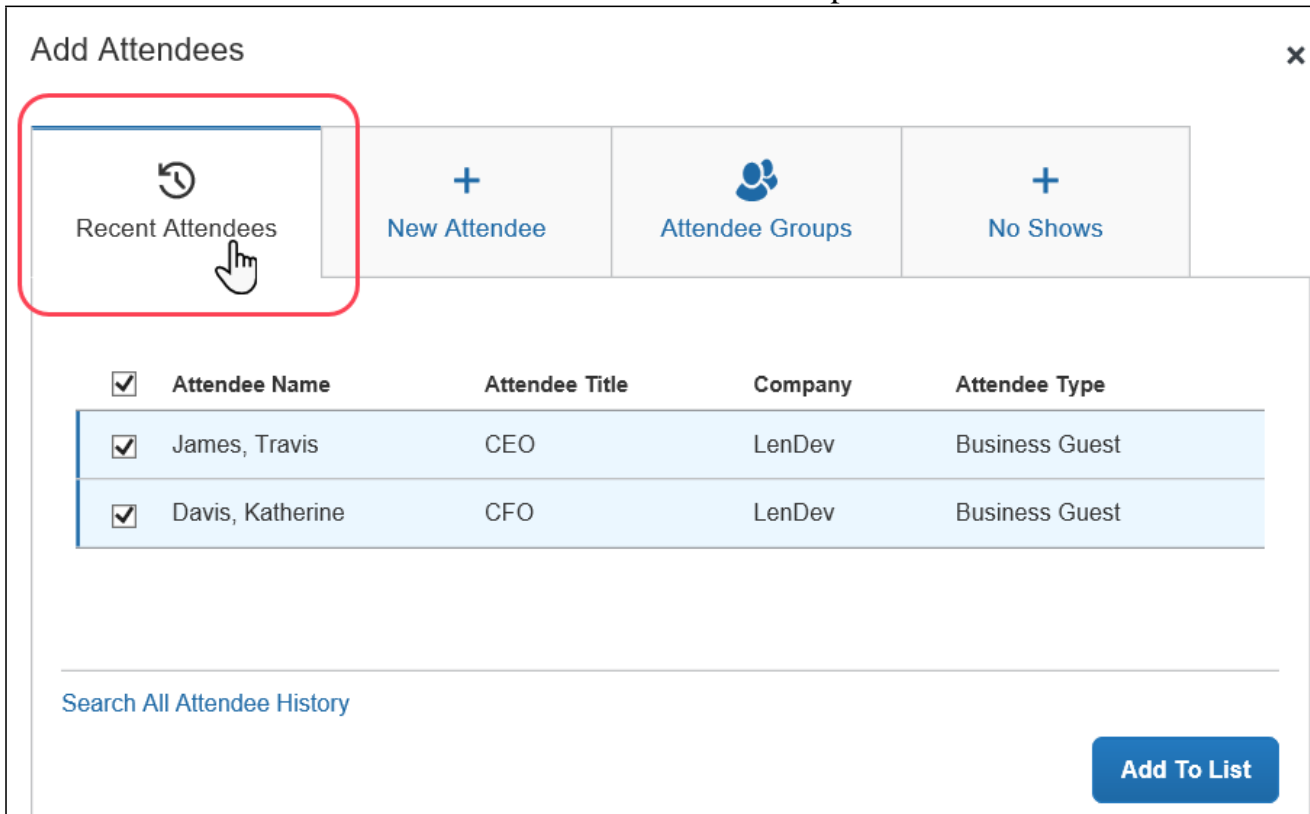
To add an attendee to an expense, click **Add**. The **Add Attendees** window appears; all of the options for adding attendees to the expense are available in this window.



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 [Close]

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.

The screenshot shows the 'Add Attendees' window with four tabs: 'Recent Attendees', 'New Attendee', 'Attendee Groups', and 'No Shows'. The 'Attendee Groups' tab is selected and highlighted with a red box. Below it, the 'Favorites (6)' group is also highlighted with a red box and a hand cursor. A red arrow points from this group to a larger 'Favorites' window. This window contains a search bar with the placeholder text 'Start typing to filter the list below' and a table of attendees.

	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

At the bottom of the 'Favorites' window, there are 'Cancel' and 'Add To List' buttons.

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 contains three buttons: "Recent Attendees" (with a refresh icon), "New Attendee" (with a plus icon and highlighted by a red box), and "Attendee Groups" (with a group icon). Below these buttons is a table with columns for "Attendee Name", "Attendee Title", "Company", and "Attendee Type". The table lists two attendees: "James, Travis" and "Davis, Katherine", each with an unchecked checkbox. A "Search All Attendee History" link is at the bottom left. A "Search For Attendee" modal is open, featuring a search bar and several input fields: "Attendee Type" (a dropdown menu set to "Business Guest"), "Last Name" (text input with "Davis"), "First Name" (text input), "Attendee Title" (text input), "Company" (text input), and "State" (text input). A legend indicates that an asterisk (*) denotes a required field. A "Search" button is at the bottom right, and a "Close" button is at the bottom left. A horizontal scrollbar is visible at the bottom of the modal.

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" (with a refresh icon), "New Attendee" (with a plus icon), and "Attendee Groups" (with a group icon). A red box highlights the "New Attendee" button, with a red arrow pointing to a secondary dialog box titled "Search For Attendee".

The "Search For Attendee" dialog box contains the following fields and options:

- Attendee Name:** A list of recent attendees with checkboxes: "James, Travis" and "Davis, Katherine". A link "Search All Attendee History" is at the bottom.
- Attendee Type *:** A dropdown menu currently set to "Business Guest".
- Last Name:** A text input field containing "Davis".
- First Name:** An empty text input field.
- Attendee Title:** An empty text input field.
- Company:** An empty text input field.
- State:** An empty text input field.

A red box highlights a link at the bottom of the search dialog: "Can't find an attendee? [Create New Attendee](#)".

At the bottom of the search dialog are "Close" and "Search" buttons.

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

Create New Attendee ✕

* Indicates required field

Attendee Type *	Last Name *
<input type="text" value="Business Guest"/>	<input type="text" value="Collier"/>
First Name	Attendee Title
<input type="text" value="Franklin"/>	<input type="text" value="Sales Manager"/>
Company	State
<input type="text" value="LenDev"/>	<input type="text" value="WA"/>
Project ID	
<input type="text" value="10799"/>	

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

