Cost Transfers for Concur Documents

If you did not provide POET information in your Concur document but now need to complete the appropriate cost transfer request, there are a few steps you can follow to ensure the transaction is posted correctly. Here’s a guide to help you through the process:

1. **Review the Transaction**
   - Before proceeding, it’s essential to review the transaction details. This includes the Concur document and any related information to ensure you have all the correct data. This step is crucial to prevent any errors or discrepancies.

2. **Request a Cost Transfer**
   - After reviewing the transaction, if you need to post it to a project, you would have to request a cost transfer. This involves updating the Concur document to reflect the correct cost allocation.

3. **Provide POET Information**
   - To complete this step, you need to provide POET information. This includes preparing any necessary documents and ensuring they are accurate and up-to-date. This step is critical to ensure the transaction is processed correctly and meets all financial regulations.

4. **Submit the Request**
   - Once you have completed the above steps, you can submit the cost transfer request. This involves providing all necessary information in a structured format that is easy to understand and process.

5. **Follow Up**
   - After submitting the request, it’s important to follow up with the appropriate departments to ensure the request is processed promptly and correctly.

By following these steps, you can ensure that your cost transfers are processed correctly and efficiently. If you have any further questions or need assistance, please refer to our Concur Training FAQs or contact our support team for guidance.