TIPS AND TRICKS

Best practices, industry recommendations and **ah-ha moments** to **optimize** your travel and spend programs

THE BEST RUN **SAP**

Approaching Effortless.

Helping you see spend clearly – and manage it proactively.

Taking your organization's travel and spend management program beyond automation is hard work. Professional life doesn't often offer shortcuts – until you start asking the right questions of your peers, industry experts and thought leaders.

Luckily for you, we're one step ahead. Our founders turned piles of paperwork into effortless expense reporting; and they didn't stop there. Based on

learnings from our customers – as well as industry expertise you won't outgrow – we've compiled tips, tricks and best practices to employ within your programs and SAP Concur solutions.

While these tips are for organizations of all sizes, we've taken care to mark those that are game changers for Small and Medium-sized businesses (SMBs). We've also marked tips that were submitted by other customers like you.
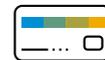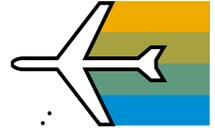
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You can also search this document using keywords by holding "Ctrl–F."

Rolling out

1 | **Develop a holistic change management plan**
A good change management and transition plan influences how your project (that is, the change) affects people and sets up your organization for success. Start early with our Change management activities guide, which outlines the steps and resources to build a strategy, communicate with and train your users – all while measuring your progress.

2 | **Communicate the vision**
Driving change and adoption throughout an organization can be difficult. Make it easier on your end users and your leadership team by communicating the VISION. Share WHY you're rolling out SAP Concur to inspire users to become power users or, at a minimum, abide by your policies. Use our communication templates on best practices.

3 | **Admin Knowledge Transfer Guide** 📱
New admin coming on board, or are you leaving your organization? Use the Admin Knowledge Transfer Guide to capture all of the institutional information you need to make a successful transfer.

4 | **Establish a pilot group when rolling out SAP Concur or a new product** ⭐
Identify a pilot group, potential early adopters or power users. For example, target employees who travel frequently, are technical and use a smartphone regularly to be vocal champions of the product. Then you can use their success stories later for training new employees, and keep them on long-term as departmental contacts for user questions or helping with features and policy changes.

5 | **Executive sponsorship** ⭐ 📱
Deliver key reports related to efficiency and cost savings to your executives to keep them engaged and justify your investment. Executives can help you with policy adjustments, drive adoption and—importantly—anticipate future organizational growth.

6 | **Getting employees started** ⭐
Ensure your new employees get set up in SAP Concur right away so they can get the most out of your solution. In your communications and trainings, encourage your users to verify the spelling of their name, emergency contact info, credit cards, frequent traveler accounts, banking information and to enable e-receipts and SAP Concur's mobile application. For TripLink users, ensure they enroll in My Travel Network.

User tip:
To have the hyperlinks open in a new browser tab, Ctrl + click for Windows and Cmnd + click for Macs.

Key: ⭐ Customer-submitted tip 📱 Great for SMBs!

Rolling out (cont.)

7 | **Update User Profiles via Import** ⭐
The User Import feature saves you time not only by adding all your employees into Concur Expense in one go, but also for bulk updates. For example, when a new manager joins, you can update the expense approver for everyone on the team quickly by editing and re-uploading the same import spreadsheet you used to loading the employees originally.

8 | **Supporting your end users** ⭐
Have a backup contact to support end users when you're not available or create an email alias strictly for internal support of user questions (e.g., concur@yourorganization). Consider SAP Concur's User Support Desk service to free up more of your team's valuable time. Consider holding regular trainings (virtual or in-person) for new and existing users to cover the basics, new features and policy changes.

9 | **Getting started with TripLink**
For those who have TripLink, you can connect trips, travelers and itineraries across multiple channels. Concur TripLink allows you to apply policy to direct bookings, locate and support your travelers and ensure negotiated rates are being booked. Learn how it works, get started and find helpful resources.

10 | **Best practices for global deployment** ⭐
Are you going global? Create a global T&E framework with strong executive sponsorship. A single T&E ecosystem brings standardization and full visibility into spend. Ensure your markets are ready before rolling out (e.g. what's in it for them?). SAP Concur App Center partners offer pre-built integrations that support global expansion – from Mexico tax regulations to VAT reclaim, immigration requirements and ERP solutions. Build a strategy: global or regional? Consider this when choosing TMCs, corporate cards, language support and country requirements. From a product perspective, keep in mind the SAP Concur still recommends a single policy (Concur Expense) and configuration (Concur Travel) per country.

11 | **Refresh your Company Notes** ⭐ 🖼️
Keep your SAP Concur homepage fresh by updating Company Notes at least once each quarter to communicate important focus areas and company goals. It is especially important to show your users how to get support. If you don't have User Support Desk, be sure to put your support email or phone number in the Company Notes section.

Key: ⭐ Customer-submitted tip 🖼️ Great for SMBs!

Product Training & Updates

12 | **Develop a training approach**
Align training with your holistic change management strategy. Include training methods, delivery, curriculum and how to locate resources. Get creative and use provided resources, such as video, presentations, surveys and scripts. Learn more here.

13 | **Join the SAP Business Exchange!**
Become a member of the SAP Business Exchange to discuss SAP Concur features products, learn about best practices, and network with your peers. Administrators can also request to join the User Admin Group (find under the Product Hub in Groups).

14 | **Set up Training Administration***
Use the Training Administration tool to manage your own training landing page for end users. View our setup video and guide.

15 | **Know what training is available** ☆
SAP Concur provides a lot of options for training. To make them easier to find, bookmark your Professional Training Toolkit or Standard Training Toolkit and visit often. You'll find helpful resources for both users and admins as well as reporting trainings and on-demand options. Email training@concur.com anytime for a quote on custom training or view our website.

16 | **View a Learning Series**
Launch your administrator education with our Customer Learning Series complimentary trainings for SAP Concur administrators. Also available in Spanish! Click here for Professional and here for Standard edition.

17 | **Back Office Administrator Training for Concur Expense***
Take your knowledge to the next level with the Concur Expense Back Office trainings. This training is designed to educate Concur Expense administrators on administration and basic configuration of Concur Expense. Classes are virtual and 90 minutes in length. View here or contact training@concur.com for a private training.

18 | **Take our Advanced Configuration course*** ☆
For customers who seek the highest level of configuration access available, this instructor-led training provides the advanced knowledge and skills needed to fully administer and maintain Concur Expense and Concur Invoice. Only participants who complete the Advanced Configuration class in its entirety along with the class requirements will be given the unrestricted permission. Learn more here.

*Functionality only available with Professional edition.

Key: ☆ Customer-submitted tip   Great for SMBs!

Product Training & Updates (cont.)

19 | **Join a Concur Travel training bootcamp**
SAP Concur offers a training bootcamp for our Direct Concur Travel customers. This two-day in-person session provides tips, tricks, and hands-on training that will benefit any Concur Travel Administrator. This will include Company Administration, key features, rule building, working with corporate discounts, and more. Find the next session here.

20 | **Keep on top of "What's New" with products**
Each month, innovative enhancements and customer-suggested features become part of your SAP Concur solution. Review the monthly release notes for each product (Professional or Standard). Note that every product has its own set of notes. You can also find the main enhancements in the SAP Business Exchange (must be a member of the User Admin Group).

21 | **Provide your feedback**
The Customer Experience (CX) team gathers and analyzes your feedback and shares what you are saying with groups throughout SAP Concur to help drive change. That way, you can focus on what's important to you. Visit our website to learn more.

22 | **Collect your users' feedback**
The SAP Concur Satisfaction Rating allows users the option to anonymously share their thoughts about their current SAP Concur experience. Make sure your organization has this turned on, and monitor the User Rating Summary (Administration Folder) to adjust policies, configurations or training.

Key: ⭐ Customer-submitted tip   🖥️ Great for SMBs!

Customer Support

23 | **Assign Authorized Support Contacts** 🏠
Each new organization is required to have at least two and up to five designated Authorized Support Contacts to gain Admin access to the Customer Support Portal, chat and phone support. Designate additional ASCs via user permissions or via Company Groups or User Administrator (Professional only). View "Getting the Most from Concur Customer Support" for full instructions.

24 | **Get the most from Customer Support**
Wondering how to get the most from the Customer Support Portal? View "Getting the Most from Concur Customer Support" or "How to Navigate" to find out how to manage your Authorized Support Contacts (ASC), subscribe to service alert emails, escalate cases and much more.

25 | **Submitting a support case** ⭐
If you're an Authorized Support Contact (ASC), include as much information as possible when you submit a case to ensure it gets to the right team as quickly as possible. This includes things such as screen shots, step-by-step details of process, browser and version info and the name and login ID of the user experiencing the issue.

26 | **Help for employees around the world** ⭐
Did you know that our Help menu documents have been translated into 21 languages? SAP Concur has improved the support administrators and users have access to, so ensure that your administrators and users know how to access the Help menu within the SAP Concur solution.

27 | **Check Concur Open** ⭐ 🏠
Having a performance or system issue? Always check open.concur.com before submitting a case to see if it's a widespread issue that SAP Concur already knows about. Log in via Personalized Concur Open to view your own organization's status. You can also share Concur Open with your users. If Concur Open reports that everything is up and running, then submit a case to Customer Support. Click on the circular icons for more info and subscribe to updates for your data center and product(s).

Key: ⭐ Customer-submitted tip 🏠 Great for SMBs!

Customer Support (cont.)

28 | **P2 Travel Notifications**
SAP Concur posts "P2 Travel Notifications" detailing less impactful issues related to Concur Travel. Before opening a support case log into the Customer Support Portal > Resources > Release/Tech info to determine if a P2 exists or view here.

29 | **Use internal social tools to communicate** ⭐
Organizations with software tools that allow employees to connect online could create a channel for user support, tips, and announcements. Users can ask questions and connect directly with your support / administrator team. Some common platforms include SAP Jam, Slack and Microsoft Yammer. Learn more about communications best practices.

30 | **Need more support? There's help.**
We know there's a lot to think about when it comes to fully optimizing SAP Concur and your employee spend programs. Aside from the complimentary training available in your Training Toolkit, SAP Concur does offer services to help your business such as customized training services (email training@concur.com for a quote), as well as services such as Consultative Intelligence, Service Administration and User Support Desk. Talk to your account team if you're interested.

Key: ⭐ Customer-submitted tip 🖥️ Great for SMBs!

Mobile

31 | **Ideas for mobile adoption** ☆
Get creative when promoting the SAP Concur mobile app. Start by getting support from your executive sponsors, and then use email signatures, flyers, newsletters, intranet, in-person gatherings and internal social media channels to reach your end users. Promote the app within your organization using the administrator toolkit promotional guide.

32 | **Mobile adoption reports** 🖼
Track your organization's SAP Concur mobile app usage monthly. Consider stats such as number of users with any mobile activity, number of receipts uploaded via mobile app, number expense line items created, number expense reports approved, number downloaded itinerary list, number of searched hotels and number of booked hotels. Use these reports to track mobile adoption under Standard Reports > Mobile Usage: Expense Mobile Metrics Summary, Invoice Mobile Metrics Summary, Mobile Login Summary and Travel Mobile Metrics Summary.

33 | **Targeted mobile adoption promotion**
Don't stop promoting the SAP Concur mobile app! Continually reinforce adoption with targeted messages to specific types of users based on reports (Missing Receipt Audit; Top 10 Spenders; Top 10 Longest to Approve; Non-Concur Travel Hotel Bookings).

34 | **Making mobile entry easier** 🖼
If you have many required fields, consider making some unrequired to make expense entry easier on the SAP Concur mobile app. Consider purchasing ExpenseIt, which integrates directly into the SAP Concur mobile app and brings itemized expenses using OCR technology, reduced lost receipts and increased productivity for your users.

35 | **Open TripIt Pro direct from the SAP Concur app**
If your organization has TripIt Pro, users can open it directly from the SAP Concur mobile app by pressing the three lines at the top left corner (depends on model).

Key: ☆ Customer-submitted tip   🖼 Great for SMBs!

Travel & Expense Policy

36 | **Travel & Expense policy** ⭐ 🖥️
Your travel and expense policy should not be stagnant, but an evolving document. Review your policy at a minimum once a year. Consider topics like branded fares, mobile apps, preferred vendor lists, internal processes and much more. Adjust your policy or better manage employees by reviewing the list of users that violated your travel policy in Concur Travel based on "violation code" and "violation reason." Include in your policy the "why" to increase understanding and compliance—why is the guideline important? Make your policy easily accessible.

37 | **Improved T&E policy engagement**
When your organization does review its T&E policy, be sure to include cross-functional stakeholders like HR, finance, legal and security, and especially your executives and end users. Ensure also that your TMC is apprised of any updates or changes. Collaboration makes compliance more likely.

38 | **Non-allowable expenses**
Best practices for non-allowable expenses include business class airfare, seat upgrades, social events, GPS, satellite radio, hotel movies, flowers, gifts, airline clubs, alcohol, frequent flier charges, car rental insurance, entertainment expenses, mini-bar, retirement events and spouse/family travel.

39 | **Targeting employees based on exceptions** ⭐
Review the "Employee Exceptions – Details" standard report to view how many exceptions trigger for each employee and what exceptions those were by code and level. Use this data to create targeted trainings or communications to those employees. Using Intelligence, you could then create a report for a specific timeframe to get a summary view and see which employees are your highest "offenders."

40 | **Sponsored Guest User feature***
Empower guests to file their own expenses and book their own travel with the Sponsored Guest User feature. This will improve efficiency in managing guest expenses and help you meet your duty of care obligations. (Note: this feature requires configuration.)

41 | **First class travel allowance**
Some organizations allow a person with a "lesser title" to upgrade to first (or business/premium) class to be able to sit with their VP, who is approved to book first class. This allows for greater productivity in the air, but is usually an exception to the rule. Additionally, many organizations allow travelers to book a First or Business Class ticket if travel is longer than a specific time, for example 8 hours.

*Functionality only available with Professional edition.

Key: ⭐ Customer-submitted tip 🖥️ Great for SMBs!

Travel & Expense Policy (cont.)

42 | **Work from home expenses**
Have employees submit any Work from Home (WFH) expenses on one separate expense report versus any travel-related expenses. This way you have a clear line of sight with those expenses—plus employees are not tempted to submit out-of-policy expenses.

43 | **Expensing alcohol**
While some companies don't allow any alcohol expenses, others may have a maximum of 2 drinks per person, per day or only allow at a restaurant or bar (i.e. no store purchases). Organizations can build rules around time of day (e.g. not during business hours) or allow it only during "business meetings" when a customer or partner is present, and not individual meals. One organization built a field to actually prompt a yes/no question asking if alcohol was consumed at the meal. If yes, the employee must itemize it.

44 | **Warm clothing allowance**
Consider an allowance for warm clothing when you have international travelers coming from tropical locations to colder ones to ensure they are comfortable when they visit clients or your offices.

45 | **Business changes**
As your organization grows, spin offs and mergers might be changes you encounter. Have a conversation with your SAP Concur account team once you know about these to ensure consistency for your end users, policies and T&E program. Revisit the Change Management Activities Guide during these periods.

Spend: Expenses & Invoices   Expense Entry

46 | **Edit multiple expenses at once**
Tell your users, approvers, delegates and administrators about the value of editing multiple expense line items at once. Simply select multiple items and hit "Edit" (or "Allocate") to take actions on multiple expenses at the same time to increase efficiency! Additionally, in the Report header, you can change the allocation to carry over to all expense line items.

47 | **Expense Assistant** ⭐
Enable expense assistant for your users to automatically create an expense report for a calendar month or a trip and fill it with incoming expenses. Calendar-based Expense Assistant creates one monthly report or adds expenses to an existing report, whereas Trip-based Expense Assistant creates a trip report and adds expenses based on the trip start and end dates into that report. It is designed for users who want to spend minimal time doing expense reports. Learn more here for Professional edition and Standard edition.

48 | **Recurring expenses** ⭐
Copy an existing expense report by clicking the "Copy Report" button to save time on creating expense reports for users with recurring expense reports (e.g. monthly parking charges etc).

49 | **Limiting expenses by timeframe** ⭐
Create an audit rule (Professional edition) with a hard stop to prevent users from submitting expenses that should only be submitted once per month or once per day (e.g. parking or phone). In Standard edition, the Expense Limits page under Compliance Controls make doing this much faster and more intuitive than creating an audit rule.

50 | **Hotel deposits** ⭐
Create an expense type for "Hotel Deposit" for employees to use if they have to pay for a hotel stay in advance of travel. Then, employees can enter the pre-payment as a negative itemization. Your organization could also partner with Conferma to implement a virtual payment (v-card) solution through Concur Travel.

51 | **Itemized hotel charges**
SAP Concur strongly recommends requiring itemized hotel charges to track and report on taxes incurred, properly itemizing the expense report, and finding and addressing unauthorized hotel expenses like in-room movies. Encourage your users not to add meal charges to the Nightly Lodging Expenses tab (e.g. room service is not a recurring expense and might be different each night).

Key: ⭐ Customer-submitted tip   🖼 Great for SMBs!

52 | **Tracking ancillary fees**
Use the airline ancillary fee expense type by enabling the fee type drop list provided by SAP Concur. The data flows into reporting to enable ancillary fee reports on expenses. Find in: Spending > Airline Ancillary Fees Summary. Configure a minimum and maximum expense threshold for specific suppliers and ask users to assign that expense to the correct ancillary fee type (e.g., assume anything coming from Delta that is under USD $75 to be an ancillary fee). Configure this into the system.

53 | **Improving attendee entry** ☆
Turn on these features to make it easier to add attendees: Favorite groups feature lets employees who frequently work with the same group of attendees create a favorite group and add them to another expense (e.g. business meal) with one easy selection. The My Team feature lets users quickly select other team members as attendees. Team is derived by Concur Expense automatically from the default approvers in the user profile.

54 | **Conditional display fields*** ☆
Administrators can show or hide custom fields depending on your defined rule. As an example, for billable expenses, you can now choose to display a custom field "project" or "client" when the user has checked an expense as "billable" (Note: this requires configuration).

*Functionality only available with Professional edition.

Key: ☆ Customer-submitted tip   🖥 Great for SMBs!

Spend: Expenses & Invoices   Corporate Card

55 | **Payment Type Analysis** (Intelligence required)
Analyze payment types to determine what percentage of your program is cash. Often, high cash usage can be an indication of other activities that you may not be thinking about, like fraud and noncompliance. Keep your cash spend to a minimum. Determine what factors are contributing to low card adoption (e.g. geography, culture, features) and take action. Find Payment Type Analysis in the Expense Processing folder. Send automated emails (Tip #180) to users who have a high amount or percentage of cash spend. Change the "from" address to appear to come from an executive, which will draw attention to it.

56 | **Finance system requirements**
Set up your card program payment type based on how you want the data tracked in Concur Expense and sent to your financial system. Don't base it on the legal agreements with the card provider. Make sure you configure your default payment types!

57 | **More payment type options**
For organizations with one or more credit card programs, configure additional choices in the Payment Type list when creating an expense manually or via ExpenseIt. This does not impact credit card Payment Types tied to an automated card feed. This requires configuration.

58 | **Corporate card distribution**
How do you know who gets a corporate card and who doesn't? Review expenses from non-card holders and establish a threshold for obtaining a corporate card (e.g. all those submitting more than USD $1,000 annually should have a corporate card).

59 | **View Transactions page**
When in Concur Expense, ensure your users with corporate cards are familiar with the "View Transactions" page to help them review card transactions. It defaults to unused charges, but can be adjusted by time period.

60 | **Past corporate card expenses*** ☆
Create an audit rule for Concur Expense to only allow an expense report to be submitted if all previous corporate card transactions are also submitted, keeping all documented spend current. Similarly, only allow cash reimbursement until credit card transactions have been submitted. (Standard Edition only allows with Custom Audit rules).

61 | **Tracking fraud to the General Ledger (GL)** ☆
Create a unique GL expense type in Concur Expense to track fraudulent charges on a corporate card. Later, when you have to balance out the account with the refund from the bank, this process is easier.

*Functionality only available with Professional edition.

Key: ☆ Customer-submitted tip   🖥 Great for SMBs!

62 | **Corporate card charge deletion** ☆
Do not allow corporate card charges to be deleted or edited within Concur Expense— unless your organization is Individual Bill, Individual Pay (IBIP).

63 | **Personal expenses** ☆
When a user makes a personal charge on the corporate card, create an audit rule to require a comment to describe the reason for the error. Consider setting an email reminder the day after an expense report has been sent for payment when the reports had a personal expense on it. (Standard Edition only allows with Custom Audit rules). This is a great way to remind users to pay their card back. Customers have seen their delinquencies reduce. Additionally, consider the Redirect Funds feature (Professional edition only).

64 | **Credit card late fees** ☆
Import the Merchant Category (MC) Code for late fees on your credit card programs. Require these to be submitted as a personal charge, reinforcing to your users that they are responsible for late fees. You can also default to personal charge for specific expense types, like credit card fees (or fraudulent transactions).

65 | **Reconciling a Lodge Card Statement**
As a Card Administrator, you can compare the lodge card statement from your bank with each card file import to Concur Expense. The "Download" link available under the View Import Logs will extract a summary of all imported transactions, whatever the current status is (Hidden, Unassigned, Assigned to Report).

66 | **Hiding transactions by Merchant Name**
Depending on your processes, you might want to exclude some specific transactions from the Expense Report flow even though they are transmitted by your provider and exposed in Concur Expense. As a Card Administrator, you can filter transactions by Merchant Name under the Manage Transactions screen and hide them. The transactions will then be removed from the employee's Available Expenses.

67 | **Chasing a "missing transaction"**
As Card Administrator, how can you track a "missing transaction"? Ask the card provider to confirm when it was sent and download the corresponding Transaction Details XLS available under the View Import Logs. Access is restricted to Global Card Administrators.

Key: ☆ Customer-submitted tip   🖼 Great for SMBs!

Spend: Expenses & Invoices   Receipts

68 | **Receipt requirements** 🏪
Consider setting different receipt requirements for those items coming through on a corporate card versus those out of pocket. For example, if your receipt policy is the $75 IRS limit in the U.S., use it for anything coming out on a corporate card. If the purchase isn't charged to a corporate card, require a receipt for everything.

69 | **Improve delegate efficiency** ⭐
Allow delegates to easily email receipts to receipts@concur.com on behalf of a user by adding in the user's email address in the subject line (both must verify in their respective profiles). This practice drives efficiency by promoting attachment of receipts at the line item level. Delegate Administrator (Professional edition) should remove inactive delegate assignments.

70 | **Approved senders list***
You can approve a central source to email receipts into Concur Expense on behalf of your employees. Ideally, this could be used by a shared service or your TMC.

71 | **Missing receipts** ⭐ 🏪
Ensure you're capturing missing receipts with a signed affidavit. We encourage moving away from paper and use the Missing Receipt Declaration function in Concur Expense. You will benefit from the Missing Receipt Audit Report (folder: Expense Processing). Figure out who you're going to audit using this report, and promote adoption of the SAP Concur mobile app with repeat offenders. Submit for auditing all transactions that fall just under the spend limit that requires a receipt. Paper affidavits should be uploaded into Concur Expense and attached like a receipt.

72 | **Identify Expenses with Missing Receipt Declaration** (Intelligence required)
Create a report to identify those expenses using the Missing Receipt Declaration function with a filter in your report that uses the data item "Has Affidavit." Find this field at the following path: Expense > Expense Reports > Entry Information > Additional Entry Details > HAS AFFIDAVIT. This field will display a 1 or 0. 1 = Yes, 0 = No. Apply the filter in the report to say "Has Affidavit = 1" and it will only pull those expenses with an affidavit.

73 | **Submitting e-receipt expenses**
Don't allow submission of e-receipt or travel reservation without card data, and vice versa (Standard Edition only allows with Custom Audit rules).

* Functionality only available with Professional edition.

| Key: | ⭐ Customer-submitted tip | 🏪 Great for SMBs! |

74 | **Receipt Requirements and Tax**
Include your organization's tax professionals to ensure you are setting up the right requirements for Concur Expense and Invoice. Your tax team would be able to differentiate needs based on your industry (e.g. government contracts, FINRA, SOX) and countries (e.g. Works councils, Mexico CFDI, Australia FBT, VAT reclaim).

75 | **Tax laws in Mexico**
Tax laws in Mexico require companies to store and validate digital tax receipts. SAP Concur's App Center partners can help streamline the validation process, as can Concur's Standard Accounting extract v.3, which passes the data required by SAT laws.

76 | **Automate Value Added Tax (VAT) refunds** ⭐ 🏪
Minimize the cost of international business travel by maximizing your foreign VAT recovery. Several SAP Concur App Center partners like VAT IT, Taxback International, and VATBox can integrate directly with your SAP Concur solution to automate the process and help you recover thousands of dollars from both expense and invoice transactions. Learn more about VAT reclaim.

Key: ⭐ Customer-submitted tip   🏪 Great for SMBs!
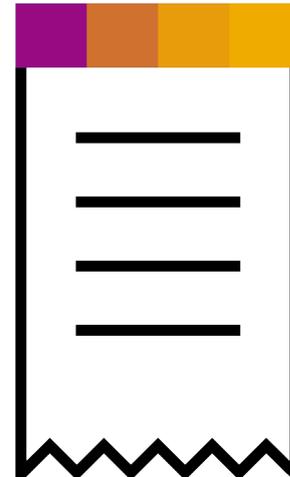
Spend: Expenses & Invoices   Invoices

77 | **Set up your site according to your culture**
We support both centralized and decentralized accounts payable processes as well as dynamic workflows. When setting up, be sure to use the approach that works for your organization.

78 | **Card payment voucher**
Easily pay vendors by triggering an email voucher on the optimal day-to-pay, authorizing them to charge the corporate/purchasing card that they have on file.

79 | **Purchase requests / orders**
Authorize suppliers to provide goods or services at specified prices and quantities in return for payment. With Concur Invoice, PO Matching and Invoice Pay, this provides an end-to-end spend authorization to pay lifecycle.

80 | **3-way invoice matching**
Automatically link invoices, purchase orders and corresponding receipts to provide visibility into goods and services received—ensuring you only pay for what you received.

81 | **PO Match Rules**
Establish variance rules for Purchase Order (PO) Matching. When invoices are matched to POs, PO Match Rules offer flexibility in allowing variances against quantity, unit price and more. Admins can determine based on tolerance if the invoice should be submitted or not.

82 | **Email Notifications to Vendors**
You can have vendors receive an email when they are paid via ACH or check. The information in the email will contain the invoice date, invoice amount, invoice number, payment date, payment method, check number and any notes that exist on the payment submission.

83 | **Request Accrual Report**
This report shows all invoice transactions that have not been assigned to an invoice or have been assigned to an invoice that has not yet been paid. It can be very helpful in coordinating month end close by providing visibility to all outstanding liabilities for easy accrual posting. Standard Reports folder > Invoice. For further value, customize the report with Intelligence to incorporate any coding associated with the invoice for AP to book the accrual properly in the General Ledger.

84 | **ACH Payments**
Streamline payments to your vendors by setting up funding accounts in Concur Invoice. Payments are processed according to the vendor's payment terms and the date of the invoice. Concur Invoice will access the funding account provided to send remittance directly to your vendors.

85 | **Check Payments**
SAP Concur offers an Invoice Check Pay for U.S. and Canada. This service enables our customers to leverage their existing banking relationships as the checks are still tied to the bank account they choose. With a simple setup to establish the check template (which includes your logo, address and signatures), customers can eliminate the manual effort of printing and mailing payments.

86 | **Extract for payment confirmation details**
Customers have the option to receive a Payment Confirmation Extract which provides remittance detail for any payments Concur Invoice has managed (ACH, Check or Voucher). In addition, as part of our Check Pay service, customers may receive a Positive Pay file which can be downloaded directly from Concur Invoice.

87 | **Purchase Order and Associated Invoices Report**
Customers can easily view open purchase orders and any associated invoices or remaining balances. This can be beneficial to track spend and accrual data. This report can be found in the Standard Reports folder > Invoice folder.

88 | **Recurring Invoices**
Set up recurring invoices to be generated on a schedule for expenses such as Rent or Subscriptions. Easily configure the frequency and start and end date to the recurring invoices.

89 | **Invoice Routing*** ⭐
Invoices can be routed to an Invoice Owner based on a specific field. By establishing a hierarchy, customers can determine which field (such as Department or Cost Center) can be used to route an invoice to an assignee, depending on which value is selected.

* Functionality only available with Professional edition.

Key: ⭐ Customer-submitted tip   🖼️ Great for SMBs!

90 | **QuickBooks import for Standard edition**
Concur Invoice Standard Edition lets you import QuickBooks accounting data into Concur Invoice. Now, when you choose to send the data to QuickBooks, Concur Invoice sends your unique accounting data as invoice data.

91 | **Create a custom query to simplify your search results**
The query tool allows you to filter specific invoices by search criteria, such as individual users, groups, approval status, etc. For example, if you frequently need to search for invoices for a particular vendor which have not yet been paid, you can create and save a custom query for that search. This saves time in your search later by allowing you to easily choose your query to find the invoices you need.

Spend: Expenses & Invoices   Workflow

92 | **Financial extracts**
Know how and when your financial extract runs, and what the information means. View the Professional Integration Administrator or Standard File Export Configuration.

93 | **Custom Workflows on Standard**
Build rules or steps with Custom Workflows for Standard edition for certain circumstances (e.g. skipping an approval step, needing an additional step or need a special approval). If you've already implemented your site, SAP Concur can activate these features (for a fee).

94 | **Track your monthly expense reports**
Quickly see how many expense reports your organization is submitting with the usage reports. Find the Billed Transaction Reconciliation (Month) report. It's located in Reporting > Standard Reports > Administration folder.

95 | **Workflow cycle times** ☆
Monitor how long it takes an expense report or invoice to move through the major workflow steps so you can identify bottlenecks in the process and justify your investment to internal stakeholders. (Folder: Expense Processing** or Invoice > Workflow Cycle Time Details.) See more here. ***Note: Intelligence is required for the Expense Processing report*

96 | **Manage cash flow with accruals** ☆
Determine the amount of expenses not assigned to expense reports and those assigned to a report but not yet paid so you can gain visibility into your outstanding liabilities, have more accurate financial reporting, and better manage cash flow (Folder: Accrual > Expense Accrual, and Accrual > Expense Accrual by Date Range). You can also look at the Intelligence report "Top Employees with Unassigned or Unsubmitted CC Transactions". These are great reports for CBCP companies.

97 | **Reduce liabilities on late transactions** ☆
To help enforce policy, manage cash flow and reduce your liabilities on taxable expenses, create an audit rule with a hard stop or allow the user to provide an explanation on any expense submissions older than 60 days or per your policy. These require additional support and approval and will help reinforce good behavior to users (Standard Edition only allows with Custom Audit rules).

98 | **Expense and Invoice Spend Management Dashboards** (Intelligence required)
The Expense Spend Management Overview dashboard provides key metrics for your organization's expense reports and their life cycle. The Invoice Spend Management Overview dashboard similarly shows metrics for the invoice process. These dashboards show the impact on cash flow and help evaluate the need for any changes in processes. Find in Persona Dashboards.

Key: ☆ Customer-submitted tip   🏪 Great for SMBs!

99 | **Setting up your approvers**
Find your approvers and make sure they're comfortable creating and approving reports and invoices. Ensure they have their profile setup correctly (receiving emails when they have reports or invoices to approve) and are reviewing attached receipts.

100 | **Increasing approver and processor efficiency**
Configure these to improve efficiencies for your approvers and processors: "Approve & Forward" button allows the approver to quickly add another approver as needed; "Send to approver" allows the processor to send the report to an additional approver; "Review in progress" button marks a report or invoice as under work by that processor, typically used when there is a question pending for the employee of that report. Your organization can also configure additional columns to display.

101 | **Processor home page**
Processors can set up their own personal home page in system settings so that they go directly to the processor page upon login to increase efficiency.

102 | **Speed up approval process by individual**
The "Top 10 Longest to Approve" report provides a rank of the longest time to approve expense reports or invoices and includes approver and employee names. Target approvers on this list with details about how the Concur mobile app can be used to approve expense reports and invoices. Find in the Expense Processing** or Invoice folders. ***Note: Intelligence is required for the Expense Processing report*

103 | **Split expense report approval**
Consider turning on the "Split Expense Report Approval" feature in Concur Expense. This enables your organization to reject a single line item on an expense report, allowing the remainder to be paid to the corporate card or reimbursed to the user. This also reinforces good education to the end users as to why an expense line item was rejected. Note: the rejected line item(s) start a new expense report.

104 | **Send back reason codes***
Implement send back reason codes to help processors track and report on why reports are sent back to users. Then, set up audit rules or drive targeted training and communications to help address and reduce issues. Available for Standard edition with custom workflow.

*Functionality only available with Professional edition.

| Key: | ⭐ Customer-submitted tip | 🏬 Great for SMBs! |

Spend: Expenses & Invoices   Workflow (cont.)

105 | **Expense report submission hard stop vs. soft stop** ⭐ 🏪
While a "hard stop" submission process will not allow the user to submit an expense report that is out of policy or not complete, a "soft stop" approach can be seen as more user friendly. For example, you can block (hard stop) an expense report from not being submitted if it includes an un-itemized hotel bill. However, a "soft stop" would allow a user to submit an expense report even if it didn't include receipts for expenses under $25, and instead might alert the manager or target them for audit.

106 | **Email reminders***
In addition to using the pre-defined rules for expenses and invoices (Overdue Receipts, Overdue Reports, Overdue Company Card Transactions, etc.), configure additional email reminders by creating or updating rules and email configurations.

107 | **Connected Lists information** (Intelligence required) ⭐
A Concur Expense Administrator can create a report in Intelligence to pull information in connected lists (e.g., names and ID codes). This can be used to easily manage these connected lists, and then can be imported into Concur Expense to edit or remove items from them.

108 | **Improve your purchasing card (p-card) program*** ⭐
Get more visibility and control by centralizing your purchase card process. Send these transactions through SAP Concur with Company Bill Statements (CBS). Reconciling all p-card and expense transactions provides a more complete picture of your employee-initiated spend.

109 | **SAP native integration***
SAP Concur's native integration on SAP ERP 6.0 + and SAP S/4HANA offers joint customers real-time solutions that accelerate the digital transformation of finance. You can now seamlessly manage finance data throughout the entire spend process, eliminating the need for manual processes.

110 | **Expense report consistency after configuration changes** ⭐
After making major changes in your configuration, create an audit rule that prevents users from submitting an expense report before the date when the changes were made. This helps ensures all changes are reflected on any submitted expense reports (Standard Edition only allows with Custom Audit rules).

*Functionality only available with Professional edition.

Key: ⭐ Customer-submitted tip   🏪 Great for SMBs!

Auditing

111 | **Audit 100 percent of expense reports**
SAP Concur recommends auditing 100 percent of expenses through automation to achieve comprehensive fraud mitigation and policy compliance. Your organization should automatically review 100 percent of expenses for policy, VAT, receipt substantiation, and fraud / anomaly patterns. Manual intervention can provide additional context, review of high risk expenses, and more. Concur Detect by AppZen, Audit Service, or both may be right for your organization. If you cannot achieve 100 percent, targeted auditing practices based on reporting may be useful, such as in the below tips.

112 | **Take both a "preventive" and "detective" approach**
Publicize "big brother" is watching in internal newsletter and expense reimbursement claims are open to surprise audits. Then become a detective and use a third party auditor, conduct random checks and audit cash expenses.

113 | **Custom Audit Rules on Standard**
Audit rules ensure employees follow policy when submitting expense reports or invoices, telling the system what is allowed, what is not allowed and what should be avoided. If you've already implemented your site, SAP Concur can activate these features (for a fee).

114 | **Auditing new employees**
Audit 100 percent of new employees for 90 days to 6 months to ensure they understand your policies. Afterwards, let them know they will fall into your normal audit cadence.

115 | **Report approved, receipts not viewed** (Intelligence required) ⭐ 🖼
Look at "Reports approved, receipts not viewed" report under the expense processing folder in Intelligence. This is a good group to submit for random auditing.

116 | **Auditing out-of-pocket expenses**
Submit for 100 percent audit any employees with a high percentage of out-of- pocket expenses.

117 | **Expenses exceed reserved rate for car or hotels** (Intelligence required)
View a summary of "booked vs. actual" by employee of car rental or hotel stays where the expensed amount exceeds the rate reserved at the time of booking. Watch for frequent offenders and drill down into their reports to identify opportunities where additional non-compliant expenses were added to the report. See more here.

Key:	⭐ Customer-submitted tip	🖼 Great for SMBs!

Auditing (cont.)

118 **Audit duplicate transactions** ⭐ 🖥️
Configure a duplicate transaction check for expenses or invoices (e.g. same restaurant, same day, same dollar amount) or build it into your audit practices (manager expenses employee and then employee also expenses manager on same meal). You can also exclude certain types. For Concur Invoice, this audit rule could help catch potential duplicate payments.

119 **Limiting meal amounts** ⭐ 🖥️
You can limit or yellow flag meals based on per diem, which is best practice, or even on individual meals (breakfast, lunch, dinner) if you have a need. Concur Expense can flag the accumulated individual meals over the entire day. You can also require a comment for meals over a certain amount. Be sure to establish a communication channel with your end users to evaluate if per diem amounts in a region or metro area need to be adjusted (unless it pertains to government rates).

120 **Merchant Category Code (MCC)** ⭐
To help detect fraud, take a closer look at the Merchant Category (MC) Code as part of the data model. Some MC codes that might be against policy or actual fraud do not appear on your card provider's "unusual activity" report. Take into consideration past incidents and flag MC codes for audit. Path to model is Expense > Expense reports > Credit Card > Credit Card Transactions > Additional Merchant Details.

121 **Multi-jurisdiction tax exposure**
This tip is to protect your own organization's exposure to audit! State, federal and foreign governments are increasingly pursuing revenue from non-resident travelers and companies. SAP Concur App Center partners like EY and Monaeo analyze travel in real-time so you can manage multi-jurisdiction tax exposures with customizable thresholds and seamless data feeds into payroll and existing systems.

122 **Enhance detection of fraud and policy violations** 🖥️
Complementary to Intelligence for Concur is our "big data" solution Concur Detect by AppZen, which uses artificial intelligence to automate expense report audits. The machine learning technology analyzes 100% of your expense report data, cross-checks it in real-time with hundreds of external and social media sources, and identifies errors, compliance issues and fraud.

Key: ⭐ Customer-submitted tip 🖥️ Great for SMBs!

Car & Mileage

123 | **Automate mileage reporting** ☆
Put an end to self-reported mileage by using Concur Drive. Configure Concur Drive to track journeys automatically on the days and times that you want. Set and forget! To improve the accuracy of mileage reimbursements across all your drivers, consider calculating reimbursements using both fixed and variable rates (FAVR) per driver. Additionally, Google Maps integration (tip #128) can be very helpful.

124 | **Different mileage rates for different employee groups**
Typically, all users of personal or organizational vehicles in one country are paid the same mileage rates. Setting up mileage rates by policy groups (Standard Edition) or unnamed mileage groups (Professional Edition) allows you to set different mileage rates for different employee groups in your organization within the same country. (see: Car Configuration Setup Guide).

125 | **Automatic car reservations**
Turn on automatic car reservations to enable users to automatically reserve a policy-compliant car with your preferred supplier when making an air reservation.

126 | **Ground transportation** 🖼
Ground transportation spend (limos, taxis and rideshare) is often overlooked when compared to air, rental car and hotels. Spend on these vendors - when unmanaged - can be quite surprising. Analyze your spend and consider other transportation options, such as enabling one of the many Ground Connectors in Concur Travel to reduce spend and drive policy. Consider enabling Uber for Business, an SAP Concur App Center partner that provides visibility on Uber rides (on average $9 cheaper than a taxi).

127 | **Excessive personal car mileage** ☆
The "excessive personal car mileage" report will give you a list of the people who have spent the most for personal mileage versus car rentals. Develop a mileage threshold where they should be renting a car instead, and if the user doesn't rent a car, create an audit rule that requires a comment explaining why. There could be cost savings, but also consider safety issues.

128 | **Google Maps integration**
Make mileage tracking easier for users. They enter the route, and the system provides the distance. Editing is possible for variations (construction, parade, etc.) to what Google Maps has provided. Mileage is a top area of fraud! Compare Google Maps data to the miles claimed with audit rules.

129 | **Make parking easier and less spendy**
Parking is a big ancillary spend item. According to SAP Concur App Center partner SpotHero, business travelers spend approximately $3 billion on parking fees a year. Consider using partners like SpotHero, The Parking Spot, ParkWhiz, or Park 'N Fly to make it easy for travelers to reserve and expense spots, while reducing parking spend across your organization.

Key: ☆ Customer-submitted tip 🖼 Great for SMBs!

Travel Management Fulfilling Duty of Care

130 | **Major emergencies**
Create preparedness plans for major emergencies that happen at the office or while traveling. Maintain contracts for health, security and travel assistance services. Ensure travelers are briefed and have access to information on how to access assistance or medical services when faced with a trip disruption or an emergency. If your organization has a crisis team, become an active member. See more about Concur Locate here.

131 | **Safety communication tools**
You need to be able to locate and communicate with your employees in the case of an emergency. Consider adopting a mobile application or tool that would allow your employees to check in, improving duty of care. Concur Locate with Active Monitoring might be right for your organization.

132 | **Assess your risk**
It's not called duty because it's optional. Predicting risk and protecting your employees when they travel is critical. And when 46% of executives say that health and travel security incidents had an impact on business continuity (2017 Business Impact of Travel Risk), you know it's taking a toll. Take this travel risk quiz.

133 | **Traveler profiles** ☆
Encourage employees to review their travel profile to verify their information is correct. This would include their office location including remote employees, name, office and mobile telephone numbers. If privacy data laws are in place, encourage employees to opt-in and test their mobile telephone numbers. Make this review an annual event for employees!

134 | **Destination information** ☆
Provide thorough pre-trip advisories or country reports for employees to review for an understanding of recent incidents or events that may impact their trip. Know your global travel destinations and establish Country Risk rating— Low, Medium, High. Additionally, these documents can provide good insight to the political, social and financial stability of the country before the visit.

135 | **Visa requirements reminder**
Activate the Visa requirements reminder feature to remind travelers to check the visa/entry requirements when booking international travel. Consider using SAP Concur App Center partner EY, whose Travel Risk & Compliance solution is fully integrated into your travel and expense workflow so employees are alerted of tax risks and immigration requirements as they're booking their trip.

Key: ☆ Customer-submitted tip 🖥 Great for SMBs!

Note: Some customers may need to work with their TMC to make configuration changes.

Travel Management   Fulfilling Duty of Care (cont.)

136 | **Promote traveler features with TripIt**
The TripIt app is an essential part of Concur TripLink, and it has many features your travelers will only find in the app! TripIt shortcuts for Siri, airport security wait times, international travel tools and interactive airport maps help maximize traveler productivity and satisfaction. Encourage your travelers to download TripIt to see what makes it a top-rated travel app.

137 | **Share travel plans with your team**
Encourage managers to have their teams share travel plans with each other. This allows them to share cabs and keep track of one another in case of an emergency. This can be made easier if you have TripLink with TripIt Pro and TripIt for Teams.

Note: Some customers may need to work with their TMC to make configuration changes.

Travel Management   Booking

138 **Enable Express Checkout** 🖼️
In Concur Travel, Express Checkout is an enhanced checkout experience for air that reduces the checkout process from five pages to two: Review and Book and the confirmation pages. Travelers no longer have to page through multiple screens to complete their air booking. For now, this applies to air-only reservations. To enable Express Checkout, contact your TMC or SAP Concur customer support.

139 **Reinforce preferred vendors during the booking process** ⭐
With Concur Travel, be more proactive by listing preferred vendors at the top of search results (search for "Wizard Options – Sorting" in the document), bringing up the lowest priced tickets or rates first, and using the "preference rank" system on bookings. Promote preferred vendors in training, communications and your travel policy. Some clients invite their vendors to employee fairs and events.

140 **Default flight time settings** ⭐
In Concur Travel, the default flight time search window is set to two hours. By expanding this default window to six or eight hours, travelers will see more options right away which will raise satisfaction and encourage smarter booking.

141 **Mark the Lowest Logical Fare (LLF)**
Guide users quickly to the lowest logical airfare in Concur Travel. Control the parameters that define "lowest logical airfare" through your configuration.

142 **Encourage use of nonstop flight finder**
Encourage the use of this nonstop air search feature in Concur Travel to allow travelers to quickly identify direct flights by most convenient schedule. When conducting a search, click the drop down arrow on the depart and return lines to see nonstop flight availability.

143 **Drive good behavior and reward your travelers**
Consider incorporating a program that rewards employees for spending less on travel. For example, encourage department or individual competition for travel compliance and reward with prizes. SAP Concur App Center partner Rocketrip motivates smart spending by letting employees keep half of the money they save on business trips to redeem for rewards like cash cards, gift cards and charitable donations – a unique approach that reduces spending by an average of 30% per trip.

Key: ⭐ Customer-submitted tip   🖼️ Great for SMBs!

Note: Some customers may need to work with their TMC to make configuration changes.

144 **Custom text and dynamic messaging** ⭐
Create an easier experience in Concur Travel by guiding travelers throughout the booking process with relevant information presented inline or as a pop-up based on display criteria, such as destination or vendor. The custom text area is under "Travel Policy Administration." You have the ability to message travelers during the booking process in almost all areas and likewise customize Concur Travel default messages. For example, when employees are non-compliant in bookings with Concur Travel, or when a trip is planned, but a hotel is not booked. This helps drive travel policy compliance and enforce duty of care. See more here.

145 **Hotel notes and Travel tips** ⭐
Display customized hotel-specific notes to Concur Travel users for properties in your program to point out additional benefits and amenities like free breakfast or parking (via the Hotel Import File).

146 **Choose the approval process that's right for your culture**
Concur Travel offers three options for approvals: manager level, the manager's manager or another designated approver. If you need more robust approval process, consider Concur Request.

147 **Enable calendar integration**
Based on the itinerary email sent by Concur Travel, enabling calendar integration will auto-populate a user's Microsoft Outlook or Google Calendar with itinerary appointments like flights and hotels.

148 **Online ticket changes**
Reduce the cost of offline ticket changes by enabling exchanges to be completed online within Concur Travel (when applicable). Work with your TMC to see if this feature is supported.

149 **Enable SeatFinder with Compleat**
If your Travel Management Company (TMC) uses Concur Compleat, our customizable travel fulfillment system, ask them to enable SeatFinder. With SeatFinder integration, if a traveler is unable to obtain a preferred seating at booking, the traveler can indicate that SeatFinder should monitor seat availability and switch seats automatically if a more preferential seat becomes available.

150 **Clone Trip**
Enable the Trip Cloning feature within Concur Travel and help busy travel arrangers easily copy travel bookings from one traveler to another.

Key: ⭐ Customer-submitted tip 🖼 Great for SMBs!

Note: Some customers may need to work with their TMC to make configuration changes.

151 | **Share Trip** ⭐
Allow your travelers to share a booked trip through Concur Travel with another user when traveling together. Creates an easy way for the user to copy the itinerary and share it while still allowing for changes such as dates.

152 | **Unmanaged travel programs** ⭐ 🏠
If you have an unmanaged travel program, make the vendor field required for any Air, Hotel or Car expense types. It will be easier to track and use as leverage in vendor negotiations.

153 | **Appointments in Concur Hipmunk** 🏠
Link your calendar (Google/Gsuite and O365) to Concur Hipmunk and appointments will appear directly in your search results. The results are sorted on a timeline so you can just slide the bar at the top to ensure flights get you to meetings on time with less hassle.

154 | **Hotel search in Concur Hipmunk** 🏠
Put the address in your calendar appointment for those out of town conferences and client trips. When you do, you can see location pins for your appointments right in the middle of your map view of hotels. This means you can find the best combination of location and price for your trip. Forget to put one in or have another place to visit? No problem, you can add pins on the fly.

155 | **Gain visibility into Concur Hipmunk** 🏠
View searches, bookings, and savings through your Concur Hipmunk Admin Snapshot by selecting View Employee Usage on the homepage widget. You'll also be able to see who has registered to help target adoption efforts. Admin Resources provides a link to our toolkit filled with adoption tools, like one-pagers and videos.

Key: ⭐ Customer-submitted tip   🏠 Great for SMBs!

Note: Some customers may need to work with their TMC to make configuration changes.

Travel Management   Content

156 | **Enable Travelfusion**
Increase ease-of-use and adoption in Concur Travel by enabling online booking of low-cost carriers around the world while applying policy and increasing compliance. Select Access Fee applicable for completed/ticketed bookings (see tip #160).

157 | **Southwest direct connect**
To provide content beyond what's available in the GDS in the U.S., enable Southwest Direct Connect in Concur Travel for access to all Southwest routes.

158 | **Branded Fares**
As carriers release their Branded Fare bundles, and these bundles become available and supported within Concur Travel, build rules to reflect your policy. Some carriers that have introduced these include Lufthansa Group, Delta, American and British Airways.

159 | **Understand New Distribution Capability (NDC)**
New Distribution Capability (NDC) has been getting a lot of attention now that some airlines require it to access some of their most attractive fares. SAP Concur is piloting NDC content for American Airlines, British Airways, and Lufthansa Group. Before asking SAP Concur to turn it on, talk with your TMC in depth to understand possible support limitations or additional fees. Alternatively, Concur TripLink may be right for your organization to access direct fares with your corporate discount.

160 | **Locating Select Access Fees info**
In the Customer Support Portal, search for "Select Access Fees" in the global search option and view the "Select Access Fees—Direct" document.

Note: Some customers may need to work with their TMC to make configuration changes.

161 | **Review User Concur Travel History** ⭐
Travel managers can review the User Concur Travel History report that provides a snapshot of employee Concur Travel usage. Look out for unfinished reservations (e.g. waiting for approval or abandoned), itinerary details, policy violations and more. If you find trips that haven't been approved, reach out to those managers.

162 | **Uncover invisible spend** ⭐
Gain more visibility with two key reports that aid in capturing invisible spend. "Invisible Spend Trend Analysis Dashboard" breaks spend down by Concur Travel/TMC or TripLink itineraries and by travel type (air, car etc.). The "Invisible Spend Details" report allows travel managers to identify the employees and travel-related expenses that contribute to your overall invisible spend. While SAP Concur has specific algorithms, the "Details" report allows you to recategorize spend based on your policy.

163 | **Consider travelers' booking windows**
Did you know that flights booked 7-14 days in advance are on average $150 cheaper than flights booked less than two days in advance? Target communications to encourage travelers to book in advance and use the User Concur Travel History report to see who is purchasing those last-minute tickets.

164 | **Unused plane tickets** ⭐
Develop a policy on how to deal with unused plane tickets. When an employee leaves the organization, if the ticket is under a certain amount, it may not be worth seeking reimbursement. However, at higher amounts, your policy may dictate that the employee has to reimburse the organization—especially if your organization is Company Bill, Company Pay (CBCP). Periodically pull the "Unused Tickets" Travel report and work with your airline partners on rebates or waivers for name changes so tickets don't go unused. It's helpful to cross reference this report with your TMC.

165 | **Hotel or car vendor rate enforcement** (Intelligence required)
Review the "Past Reservations with Rates in Excess of Negotiated Rate" report to determine potential refunds you can request from the vendor. Then do the same for upcoming hotel stays or car reservations by reviewing the "Upcoming Hotel Reservations with Rates in Excess of Negotiated Rate" report.

Key: ⭐ Customer-submitted tip   🖼️ Great for SMBs!

Note: Some customers may need to work with their TMC to make configuration changes.

166 | **Keep "squatters" out of your hotel program**
Remove your company rate access code from the "consortia" field in "Manage Company Discounts" in Concur Travel to avoid hotels from outside of your program appearing with company negotiated rates.

167 | **Top City Pairs** (Intelligence required)
The "Top City Pairs" report provides visibility into booking value, number of trips and average fares. Determine if your fares are in line with your expectations and negotiations with vendors and where improvements can be made in fare spend. You may need to adjust policies or configurations, or negotiate with vendors.

Note: Some customers may need to work with their TMC to make configuration changes.
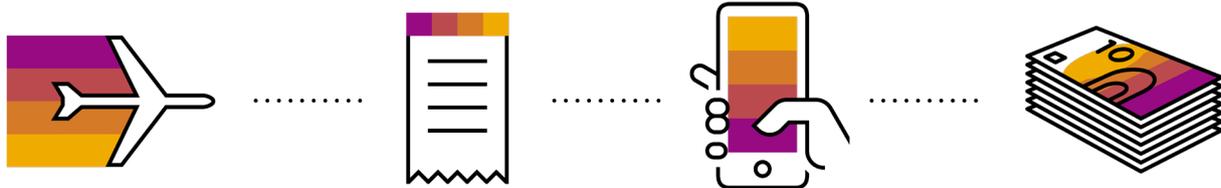
Requests

168 **Passive request approval**
This feature for Concur Request allows auto-approval of all workflow steps on a set number of days or hours prior to the approval time limit. A typical situation would be to enable this so that a user avoids a trip booked in Concur Travel to be cancelled due to lack of approval.

169 **Enable expected expenses**
In Concur Request, this feature allows for expected expenses (based on expense type) to be requested and approved pre-trip. Common examples include taxis or meals.

170 **Define the booking path for travelers**
The booking switch is a decision-making tool that allows a Concur Request administrator to define when a trip can be self-booked (by the user) or must be agency-booked (starting in Concur Request). Allow or prevent users to book in Concur Travel by setting criteria such as place of departure/arrival, itinerary type, segment type, and more. This feature can be combined with the Enforce Online/Offline Policy site setting that sends the user to Concur Travel to book a trip.

171 **Enable cancellation request feature**
In Concur Request, enable this feature to allow users to cancel the request. This cancels the trip automatically in Concur Travel if the ticket was not yet issued and if booking was not an instant purchase. For offline booking, cancelling the request triggers a notification to the TMC (if configured) for "agency-booked" segments.

172 **Allow Concur Request administrator to re-open a closed request**
Enable this site setting to allow a Concur Request administrator to re-open a closed request. Often, this involves an approved request closed by mistake by the traveler before it was attached to the expense report. Enabling this setting gives authority to the Concur Request administrator to re-open the request, which will allow the user to attach the re-opened request to the expense report.

Note: Configuration with SAP Concur is required for these features, and customers may need to work with their TMC as well.

Reporting

173 | **Create a "Custom Field" cheat sheet**
Some reports can be challenging to interpret because your Custom Field labels (often cost centers, divisions or departments) don't appear—instead you'll see their generic field label (e.g. custom20). Get old school and keep a "cheat sheet" handy so you know which Custom Field belongs to which values. You can also pull the Configuration Report which shows the generic field label and what you customized it to.

174 | **Controlling data access in data warehouse**
Limit data access in the SAP Concur data warehouse among your employees:
1. (Professional) SAP Concur can set up a reporting hierarchy (for example, Finance/ Accounting do not need any limits, whereas another team or business area may need access to reporting, but not need to see data for the entire organization) or can use BI Manager Permission (may need to be configured by SAP Concur).
2. (Standard) Use BI Manager Permission to limit data (however Cognos roles have no limit on the data the user can see).

175 | **Concept mapping***
In the data warehouse look for Concept Field Folders (department, cost center, business unit, division, project) to build reports based on or see spending based on these items. Find this in Administration > Expense Admin or Invoice > Map Concept Fields.

176 | **Find the right report and build reports quickly** ☆
Rely on the reporting catalogue to get previews and specs on reports before you go through the trouble of guessing which one you need. Always start from an existing report too—it's easier than building one from scratch! Pick a very short amount of time as a sample and start with your own data so you can recognize what each field represents.

177 | **Optimize your reporting**
Use the "SAP Concur Optimization: Best Reports to Track Business Metrics" document to get the most value from your SAP Concur solution.

178 | **Access your Insights Dashboard**
The App Center Insights Dashboard uses your organization's data to indicate if an App Center partner integration could help you save money, create a better user experience, or solve operational challenges. Ask your SAP Concur account team to share this report with you today. The report also includes the potential ROI if you use a partner solution.

*Functionality only available with Professional edition.

Key: ☆ Customer-submitted tip 🖥 Great for SMBs!

Reporting (cont.)

179 **Actionable Analytics automatic email alerts** (Intelligence required)
Email alerts deliver reports embedded within the email—not sent as attachments—for easy review. Make real-time decisions based on pre-defined data triggers, such as card spend or percentage to budget.

180 **Report bursting** (Intelligence required) ⭐
Report bursting allows a user to easily distribute the contents of a report to a group of individuals, helping with user communications, adoption and compliance. Every recipient receives only the information from that report appropriate to their situation. First, you build a report to be bursted, then schedule it. Consider working with Consultative Intelligence or purchasing a custom report for complex queries.

181 **Use report bursting for more than spend management**
Consider using Report Bursting as a communication tool to reach your end users. Deliver automated reports to employees embarking on travel in areas that might need a VISA or have special travel restrictions. Another example is for users who are entering expenses for the first time or after a long hiatus to remind them of policy timelines or tips. Reports like these can improve user satisfaction and drive adoption and compliance.

182 **Executive Overview Premium dashboard** (Intelligence required)
This dashboard focuses on the five key areas of interest for finance and expense managers: operations, spend management, commodity management, administration and departmental review. Use this dashboard to continuously keep your finger on the pulse of your program.

183 **Department Manager persona dashboard** (Intelligence required)
This dashboard provides quick access to data relevant to department managers. See what needs attention and use interactive components to drill down into the new detail reports. Locate in the Persona Dashboards tab.

184 **Active report dashboards** (Intelligence required)
Deliver the key T&E metrics and performance indicators so you can provide the right data to the right organizational stakeholder, such as AP, Finance, Operations, Travel or Tax.

Key: ⭐ Customer-submitted tip 🖥️ Great for SMBs!

Reporting (cont.)

185 | **Determine what internet browsers your employees are using**
Users by Browser is available to all admins working with the Concur Expense, Request, Invoice, and/or Travel products. This report allows the admin to download a CSV file that includes a listing of employees who have logged in and their browser type. Administration > Company > Users by Browser.

186 | **Authorized Approver Details report** (Intelligence required)
The Authorized Approver Details report helps you monitor groups and approval limits associated with your Authorized Approvers and Cost Object Approvers. Select the type for options associated with this level of the hierarchy. Find it in the Administration folder.

187 | **Schedule a report to run each month for last month's data**
In the report studio, use a pre-defined filter "Last Month" in the data warehouse (e.g. Sent for Payment date) to build your report. Then you can schedule a report (click on the calendar icon) by day, week, month or more. This can help you (or those you configure to email) keep on top of a specific business metric.

THE BEST RUN **SAP**