SAP Concur ⓒ

SAP Concur Tips Sheet | PUBLIC

Tips and Tricks for Administrators: 2022 Edition
The Best of Timely Topics Education Series

THE BEST RUN **SAP**

Overview

Summary

Your business is moving forward without looking back. But to keep moving ahead, we need to continually refine – and redefine – travel and expense programs to make sure you're making the most of your solution. These tips and tricks are designed to help you get more value out of your SAP Concur investment…and get more time back in your day.

How to Use This Document

- Start at the Table of Contents on the next page to skip to tips for solutions you already have, or key topics you want to learn more about.
- Take action today or save your favorite tips for later.

Learn More

- Want to learn even more ways to make the most of the solutions you have? Visit the Timely Topics Education Series on SAP Concur Community to access insightful webinars, videos, eBooks, and more.

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App Center

Tip #1:

Over half of your travelers will say "no" to travel if they don't feel safe. **Reassure them with neighborhood safety data from TripIt Pro**. This App Center tool covers everything from political unrest to women's safety, to basic freedoms - so everyone can travel with confidence.

Tip #2:

There are many simple ways to commit to sustainable travel. Just **tap into the App Center to calculate travel emissions, purchase carbon offsets, find eco-certified suppliers**, or give your travelers extra help making the most sustainable travel choices.

Tip #3:

Simplify international travel when you **access App Center partners like VisaHQ to get quick visas, passports, and other required documents.** It takes the challenge out of crossing borders, so your team can focus on their work.

Compliance

Intelligent Audit

Tip #4:

Driving corporate card usage is a surefire way to get more out of Intelligent Audit. Here's how: **See how the cards you've assigned are used, and keep an eye on cash transactions**. Then share your goals with cardholders.

Tip #5:

Here are **two quick ways to eliminate paper receipt problems**: Take advantage of e-receipts from your suppliers and drive people to ExpenseIt. You'll drive down errors, speed up reviews, and get better transaction data.

Tip #6:

One of the best things Intelligent Audit can do for you is **identify individuals who are "repeat offenders"** when it comes to errors and suspicious spending. You'll know who's making the mistakes, so you can target your training.

Configuration

Concur Expense Professional

Tip #7:

How do you get more out of Concur Expense? **Turn on the Receipt Image Required rule** and make sure every expense comes with a picture of the receipt. That way, no one's chasing paper trails, and your receipt rules are automatically reinforced.

Tip #8:

Here's another tip to make the most of Concur Expense. **Don't slow down workflow with jobs your reports can do**. If the C-suite needs to see certain expenses – but they're not approvers – send a report and keep them out of the workflow.

Tip #9:

Are your expense types creating clarity or causing mistakes? If you have a single account code for meals, for example, **you don't need different expense types for breakfast, lunch, and dinner**. Simplify with the codes in Concur Expense and get better data.

Concur Expense Standard

Tip #10:

Too many expense types can confuse your users, but you can **quickly create policy groups that organize expense types** based on what each group needs. So admin and salespeople, for example, only see what they need to see.

Tip #11:

What spending rules make the most sense to help stay you on top of spending? **Check your Concur Expense solution for pre-set, best-practice guidelines**. They're built on countless client successes and proven to strengthen spending policies.

Tip #12:

Here's a one-click trick to speeding up expense report approvals: Just **check the "Reroute to Approver's Manager" box in Concur Expense**. If a report doesn't get approved on time, it goes to the approver's manger. And that gets things moving.

Concur Invoice

Tip #13:

Tired of toggling between screens to compare Concur Invoice to what your vendor actually sent? **Adjust your Invoice Preferences to automatically open invoice images** – so you can compare apples to apples in an instant.

Tip #14:

How deep do you have to dig to find a certain type or set of invoices? Instead of typing in search terms, **create custom queries in Concur Invoice** – so you can save specific searches and get the results you want in a couple quick clicks.

Tip #15:

End the AP challenge of what's open, what's pending, and what's paid. **Set up a Total Invoiced Amount column in your PO view**, and you can easily see which POs are closed, those that haven't been invoiced, and how they're accruing.

Concur Travel Standard

Tip #16:

Create more than one policy in Concur Travel, and you can give everyday travelers one set of restrictions and offer fewer rules to VIPs. That keeps spending in line and keeps your road warriors happy with your program.

Tip #17:

If you truly want to improve the booking experience and compliance, add custom instructions in your Concur Travel. For example, you can **set a popup to remind travelers to decline insurance when renting a car**, because your program already has it covered.

Tip #18:

How do you make booking better? Make it faster. **Add commonly visited locations to simplify the search process** in Concur Travel, so instead of typing in places they often go, travelers get a dropdown menu and can quickly click their destination.

Concur Travel Professional

Tip #19:

Here's a simple way to **speed up pre-trip approvals**: Don't have so many approvals. When you minimize the criteria – say to a certain destination or above a dollar threshold – you make it easier to keep your business moving.

Tip #20:

Just because Concur Travel can capture reams of data at the profile and trip level, it doesn't mean you should try to use it all. **Capture only the itinerary data you need** to manage your program, and you'll keep the process from getting cumbersome.

Tip #21:

This travel tip sounds obvious, but it often gets missed. **Prioritize preferred vendors in Concur Travel** so travelers see them first, and you'll drive volume to suppliers with negotiated rates. Make it easy to see, and you make it easy to save.

Remote Workforce

Amplify your virtual communication

Tip #22:

When you're communicating about an upcoming policy change in this always-changing business environment, **have your direct managers be directly involved with telling their teams.** Remember, change is most effective from the top down.

Tip #23:

The single most helpful thing you can do when trying to communicate T&E policy changes with your teams? **Reach out to your marketing department to make sure your message is meaningful**, on brand, and effective.

Tip #24:

Change can be scary for employees, so don't just tell them what T&E policies or process changes are happening or when they'll occur – **make sure everyone knows why changes are being made**. This will go a long way toward getting them engaged.

Reporting

Tip #25:

Here's a quick way to help cut down on fraud. **Switch "Payment Type Mismatch" to "Yes" when running a report**. This will highlight the line items with the biggest potential for fraud and help you decode duplicate expenses.

Tip #26:

Try turning on the Expenses Near Receipt Limit report and **get a good look at every receipt that comes in just under your limit.** Then watch for patterns to determine if a series of $49 cash expenses, for example, are real or fraudulent.

Tip #27:

Did you know you've got a Receipts Received But Not Reviewed report you can use to **see which managers are skipping expense report reviews**? You can show them you're paying attention and watch their behavior change.

Looking for more resources on reporting? Check out the [Reporting Hub](#) on SAP Concur Community.

Travel

Considerations as Employees Return to Travel

Tip #28:

Returning to travel means refocusing on safety, so tell your travelers to **tap into TripIt for neighborhood safety scores** for their destination. They'll find safer places to stay and safer ways to get there.

Tip #29:

Want to do your duty of care? Go into Concur Travel and **switch employee emergency contact information from "optional" to "mandatory."** Because when they have to give you their info, you'll be sure to have it.

Tip #30:

Before they hit the road, **make sure your travelers know who to contact in case there's trouble.** Check your duty of care solution for "safety communication" tools and be sure they're accessible.

Ways Concur Request Can Help You Now

Tip #31:

Get more out of Concur Request and take better care of your teams when you **set up destination safety alerts**. Travelers will get relevant safety details about where they're headed, and you deliver on your Duty of Care.

Tip #32:

Here's a quick tip to manage spend: **Use Concur Request to see the total cost of a trip before it's booked**. Look beyond transportation and lodging, and you'll see costs like allowances, incidentals, entertainment, and more.

Tip #33:

More help for your travelers: **Turn on Structured Email Notifications in Concur Request to send trip details to your travel agency**. They'll have info to support your travelers, and your travelers won't have to use yet another tool to get their needs across.

Sustainable Travel

Tip #34:

How do you make travel more sustainable? Use your Concur Travel to **point users to hybrid rental cars and trains that have a better carbon footprint** than planes. They're simple solutions that can lower your carbon emissions.

Tip #35:

Want to lower your carbon footprint? Use Concur Travel to **feature suppliers that meet your sustainability goals** – it can even send a message to recognize travelers for making great choices and following your sustainable practices.

Tip #36:

Enlist employees in your sustainability cause – just **use TripIt Pro to share air travel carbon emissions** and provide ideas to reduce or offset their impact. It can reduce costs, increase efficiency, and help save the planet.

Mileage

Tip #37:

If your road warriors are still using their odometers to track mileage, they're wasting your time and money. Tell them to **turn on Concur Drive and capture accurate mileage** without any manual work.

Tip #38:

Want to save employees time when they come in from the road? Use Concur Drive to automatically capture mileage and **automatically turn every trip into a line-item expense**.

Tip #39:

How do you encourage employees to use Concur Drive? **Tell them they'll get reimbursed faster**. Drive also eliminates manual mileage tracking, so they don't have to log their miles or enter them on expense reports.

As Travel Gets Moving Again

Tip #40:

Turn on Concur TripLink and **bring every itinerary detail into your system** – including trips booked directly with airlines, hotels, and rental car companies. You'll know exactly where your travelers are, so you can help keep them safe.

Tip #41:

Have your travelers forward their itineraries to a single email, and all their trip details will be at your fingertips. You'll be able to support them on the road, and they'll be able to focus on their work.

Tip #42:

If you want to control all your travel costs, **make sure you're evaluating travel spending by category, cost center, employee, and team**, so you can spot patterns, behaviors, and places to improve.

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Take Advantage of Concur TripLink

Tip #43:

Make getting back on the road easier. Use your free TripIt Pro subscription **to give your travelers wayfinding tools** – so they can get through airports, get to their hotel, find their meetings faster, and stay focused on their work.

Tip #44:

Want to see more of your spending and make the most of your Concur TripLink investment? **Check out the Invisible Spend Detail Report**, and you'll see flight, rail, hotel, and car-rental data you weren't capturing before.

Tip #45:

You don't have to build a bunch of reports to get the travel spend details you need. Just **use the ready-made reports included in your Concur TripLink package**. Go to Public Folders/Intelligence/Standard Reports for all the details.

Employee Experience

Mobile App

Tip #46:
Improve your employees' everyday mobile experience by having them **turn on the multi-page button in ExpenseIt**. They'll be able to roll through stacks of paper receipts – snapping a picture of each – and upload them all at once with the click of one "done" button.

Tip #47:

Give every employee a virtual personal assistant by turning the Expense Assistant feature. When you do, all their expenses automatically transfer to an expense report, and they can set it to be calendar-based or trip-based. It's like having someone take care of their expenses for them, so they don't have to think about it.

Tip #48:

Every little thing you can do to make business travel better is a big deal. So **load your office locations into your SAP Concur solution,** and when employees are searching their destination, they'll see all the hotels nearby, and they can book with a click.

General Employee Experience Tips

Tip #49: Concur Request

Add preapprovals to your booking process, and employees won't have to waste time planning a trip that falls outside your policy – and you won't have to waste time explaining why a trip can't be reimbursed.

Tip #50: ExpenseIt

Keeping track of receipts is the most irritating part of business travel. But you can **get rid of paper receipts with a simple app**. It'll be easier for employees, and you'll get instant, accurate, electronic records of every purchase.

Tip #51:

Who knows what could happen on a business trip these days? But when you tap into 200 SAP Concur app partners, you can **give travelers a head's up** on virus outbreaks, natural disasters, or any other issues that may arise to help them feel safe and prepared.

Spend Governance

Tip #52:

Make a simple tweak to your SAP Concur solution, and you'll be able to **see if supplier payments are ending up on expense reports** when they should be covered by POs.

Tip #53:

Help yourself to a little more oversight – just add a simple request to your workflow and **give mangers a preview of spending** before employees make a purchase.

Tip #54:

Make things easier for your travelers and your AP team: **Get rid of paper receipts** by turning receipt snapshots into a digital record that automatically itemizes and categorizes charges.

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