

Welcome Pack | EXTERNAL

Budget from SAP Concur[®]: Let's Get You Started

Now you can stay on top of your budgets with a 360-degree of all your spending — before and after it happens.

THE BEST RUN



Overview

Budget at a Glance

Budget at a Glance

SAP Concur is the world's leading provider of integrated travel, expense, and invoice management solutions, driven by a relentless pursuit to simplify and automate these everyday processes.

With Budget, you'll gain a wealth of business benefits:



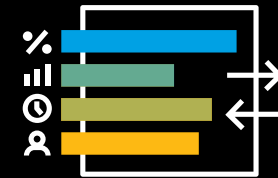
Facts at Your Fingertips

Capture and consolidate data for a holistic view of employee spending across your organization in near real-time.



Empower Budget Owners

Use intuitive dashboards to give every budget owner the visibility to see what's happened and what's coming up.



Taking Better Control

Give budget owners the tools to better manage spend – with key insights at the point of expense or invoice approval.

Overview

Here's How It Works

Here's How It Works



Smarter Budget Control

Once you plan and create a budget, you can effectively manage it by taking control of spend before and after it happens.



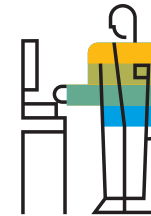
Smarter Decision Making

Budget owners can check the impact of validating invoices, purchase requests, and expense reports – before approval.



Key Data Brought Together

Budget uses the SAP Concur connected platform to continuously collect and synthesize data from Concur Expense, Concur Invoice, and Concur Request.



Controlling Who Sees What

You set permissions — from visibility to approval rights — to ensure people are connected to the right budgeting tools.



Keep Everything in One Place

Budget owners can see employee spend from all angles on one screen, via web and mobile dashboards. Budgets are color-coded to indicate health.



Real-Time Notifications for Managers

Customizable alerts ensure managers are never caught off-guard when budgets approach spending limits.

Overview

Additional Details

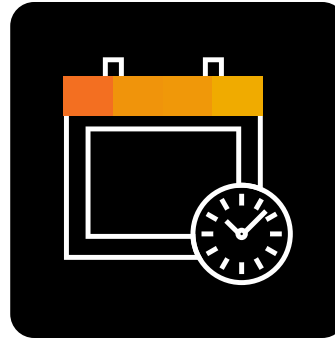
Additional Details

With Budget, you can say goodbye to tricky issues that often affect the budget process.



Save Resources

You no longer need to pull together historical and future spend data from multiple sources, which can be labor intensive and prone to errors.



Act in Time

There's no danger of data arriving late and impeding decision making or causing you to run the risk of non-compliance with financial rules.



See Clearly

There's no fog shrouding the numbers. When more scrutiny is required, budget owners can easily drill into the data to answer specific questions.

- Go-Live
- Getting Up and Running

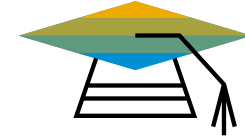
Getting Up and Running

Follow the three steps below so your people can start making the most of Budget today.



Take the Course

Now's the perfect time to become familiar with Budget yourself. [This course](#) provides an ideal introduction and explains the basics to get you started.



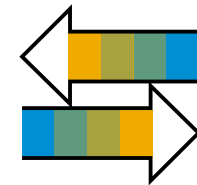
Prepare to Launch

Agree to the go-live date with your Concur Implementation Project Manager. They'll also guide you through the Budget Configuration process using sample budget data you provide.



Communicate

Ensure your budget owners know about the new service and how they'll benefit.



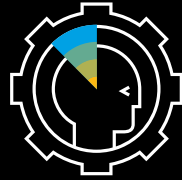
IMPORTANT: Check out the [Adoption](#) section for a set of communication resources you can customize and use.

Go-Live

Important Questions
and Answers

Important Questions and Answers

As an administrator, you'll probably want to know more about Budget. These resources will help.



Gain Expertise

This [guide to budget configuration](#) will train you in best practices and show you how to adapt the service to work for your specific requirements.



Focus on Key Tasks

Your [admin toolkit](#) includes more than a dozen videos on everything from budget items and mapping tracking fields to categories and calendars.



Learn About Setup

Dive into the detail with the [Budget Setup Guide](#) which looks at roles and rules, workflow, dashboards, permissions, and other important ingredients.



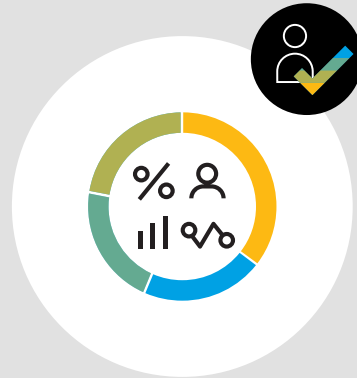
Do you have more questions?

Reach out to your SAP Concur representative for support.

| |
|--------------|
| Adoption |
| Key Messages |

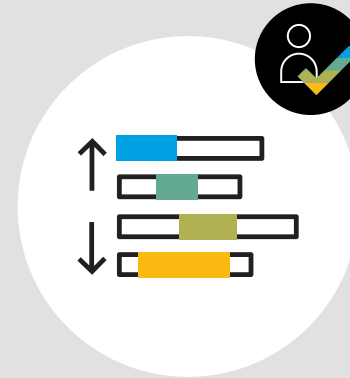
Key Adoption Messages

Employees in your organization will personally benefit from the smart and seamless functionality of Budget.



Instant Insights

Finance leaders, sales leaders, and project managers can see what's happening with their budgets in a far simpler way.



Best Use of Funds

They can prioritize items to avoid overspending and never miss an opportunity to take full advantage of their budget.



Peace of Mind

They can receive notifications when their budget reaches thresholds, so they are never caught by surprise.



Easy to Access

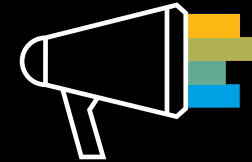
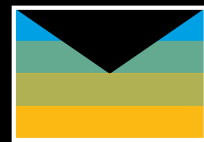
They can access Budget and its dashboards via the Reporting tab within the SAP Concur mobile app or Concur Solutions on the web.

Turnkey Tools

SAP Concur has a wealth of resources to support employee adoption at your organization.

Adoption

Turnkey Tools



Announce the News

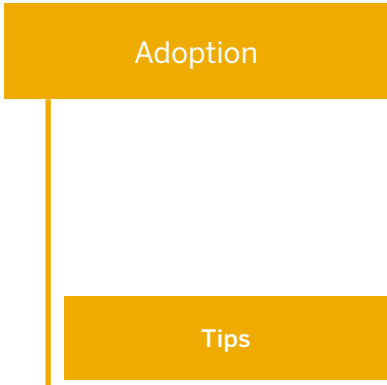
[Customize and use this email](#) to tell your budget owners that the service is on its way.

Offer Online Training

Share [training resources](#) with your users. These include helpful videos and a practical Getting Started Guide.


Promote the Service

After Budget has gone live, use [posters and digital signage](#) to raise awareness about the service and its benefits.



Tips

If you hear questions like these come up from your users, SAP Concur is here to help:



How do I know if I have **Budget**?

What do the different **colors** within Budget indicate?

How do I **view** my budgets?



Can I **update** my own budget?

Can **others** view my budget?

Will I get **alerts** when I'm reaching my budget limit?



This [Budget FAQ](#) has helpful answers you can share with budget owners.

Thank You

With Budget, you can move to a world of real-time visibility, freeing up resources for your team and enabling them to make better financial decisions that strengthen your bottom line.

Ongoing Support

Got a question or need advice? Just ask your SAP Concur representative.

Systems Issues

Visit the [support page](#) to raise a case and/or ask your Service Coordinator.

Contact Us



Follow Us



www.concur.com

Customer Lifecycle Budget enUS (22/02)

© 2022 SAP SE or an SAP affiliate company. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP SE or an SAP affiliate company.

The information contained herein may be changed without prior notice. Some software products marketed by SAP SE and its distributors contain proprietary software components of other software vendors. National product specifications may vary.

These materials are provided by SAP SE or an SAP affiliate company for informational purposes only, without representation or warranty of any kind, and SAP or its affiliated companies shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP or SAP affiliate company products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

In particular, SAP SE or its affiliated companies have no obligation to pursue any course of business outlined in this document or any related presentation, or to develop or release any functionality mentioned therein. This document, or any related presentation, and SAP SE's or its affiliated companies' strategy and possible future developments, products, and/or platforms, directions, and functionality are all subject to change and may be changed by SAP SE or its affiliated companies at any time for any reason without notice. The information in this document is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, and they should not be relied upon in making purchasing decisions.

SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP SE (or an SAP affiliate company) in Germany and other countries. All other product and service names mentioned are the trademarks of their respective companies.

See www.sap.com/trademark for additional trademark information and notices.