Spendtelligence

25 Tips & Tricks for Concur Expense

Boost your Spendtelligence™ with best practices, tips and tricks for Concur Expense. From the Best Practices Dashboard to configuring approval flows to online Help menu in 21 languages, this eBook covers everything you need to know to get the most out of your Concur solution.

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1 Use the Best Practices dashboard

Make sure to analyze your program and review best practice suggestions for Concur Travel and Expense by using the Best Practices Dashboard.

2 Check duplicate transactions

Configure a duplicate transaction check (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 of expenses. This will help fight against duplicate reimbursements.

3 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 Concur already knows about. If Concur Open reports that everything is up and running, then submit a case to Client Support.

4 Encourage mobile adoption

Many organizations are promoting a mobile first mentality when submitting expense reports via Concur. Promote the Concur mobile app by first getting support from your executive sponsors, and then use email signatures, flyers, newsletters, in-person gatherings and internal social media channels to reach your end users. Promote the app within your company using the administrator toolkit promotional guide.

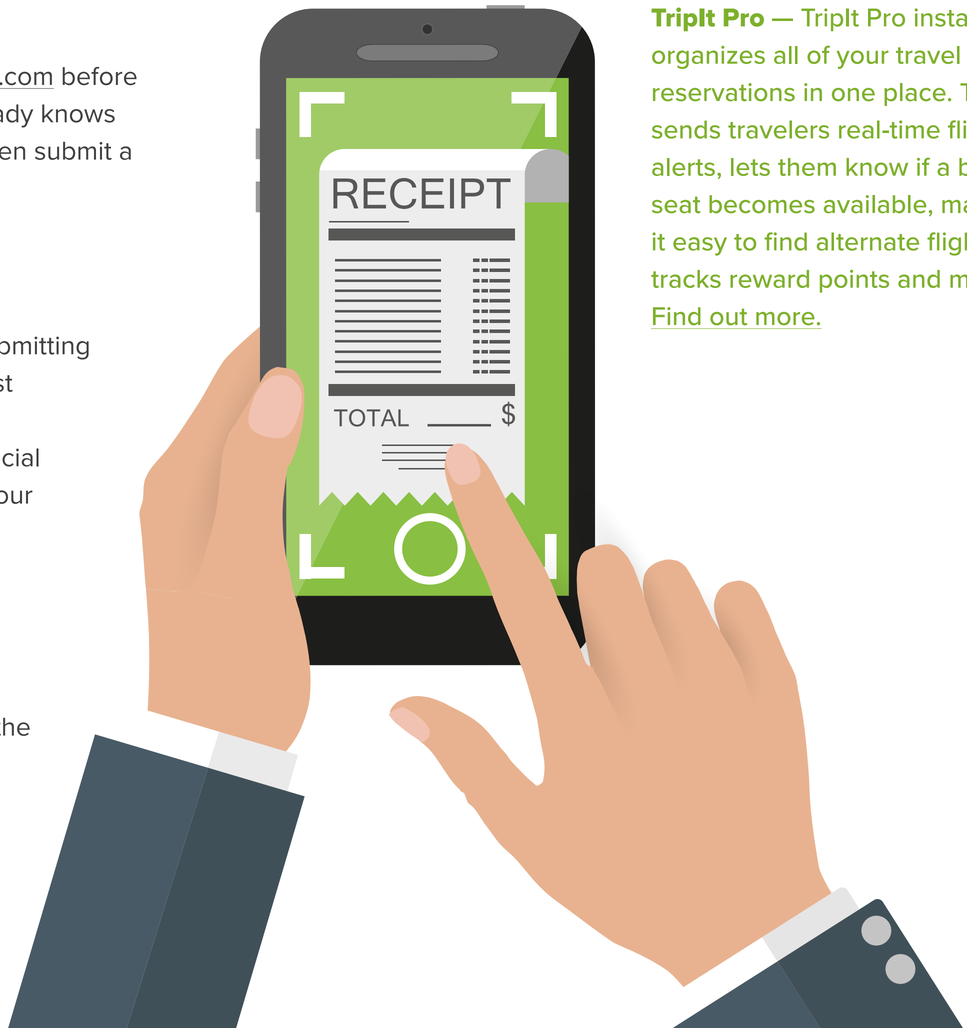
5 Open apps directly from the Concur app

If your company has ExpenseIt or TripIt Pro, users can open them directly from the Concur mobile app by pressing the three lines at the top left corner within the Concur mobile app (depends on model).

PRODUCT SPOTLIGHT

Is your company utilizing ExpenseIt or TripIt Pro? Find out more about these add-on products below.

ExpenseIt — ExpenseIt is a receipt capture app that makes submitting expense reports even easier. Users simply snap a photo of a receipt, and ExpenseIt automatically creates, itemizes and categorizes an expense entry, so expense reports get done faster, get done right and get you the information you need to manage your monthly budget. Check out ExpenseIt in action.



TripIt Pro — TripIt Pro instantly organizes all of your travel reservations in one place. The app sends travelers real-time flight alerts, lets them know if a better seat becomes available, makes it easy to find alternate flights, tracks reward points and more. Find out more.

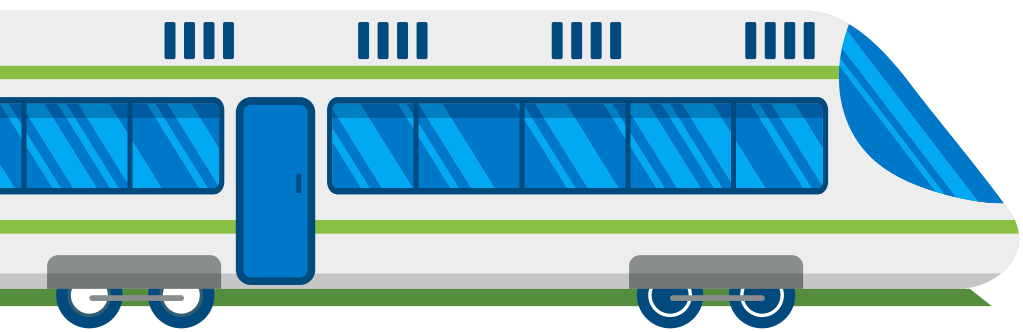
6 Configure approver/processor functions

Set up the features below to improve efficiencies for your approvers and processors:

- **Approve and 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 as under work by that processor

PRODUCT SPOTLIGHT

Concur Audit — Concur Audit ensures Travel and Expense (T&E) policy compliance with trained and certified resources who validate and objectively substantiate expense receipts following criteria you define. Our predictable turnaround ensures fraud is identified prior to reimbursement and delivers the insight you need to reduce waste, control spending and modify future behavior without increasing overhead.



7 Limit meal amounts

You can limit or yellow flag meals based on per diem, which is best practice, or on individual meals (breakfast, lunch, dinner) if you have the need. Concur can also flag accumulated meals over the entire day.

8 Add attendees from Outlook

Forward a meeting from Microsoft Outlook to receipts@concur.com. Concur Expense will parse attendees and they will show up under smart expenses to add to your expense report. This is found under Expense Admin > Attendees. From the Settings tab, you can turn on this option.

9 Send personal expense reminders

Consider sending an email reminder the day after an expense report has been sent for payment when the report includes a personal expense. This is a great way to remind users to pay their card back. Many Concur clients have seen the number of delinquencies decline.

10 Network with your peers

Become a member of the LinkedIn® Client User Group to discuss Concur features, learn about best practices and network with other clients of Concur.

11 Audit new employees

Start by drafting an audit policy so you know what to audit and what is within company policy. Audit all 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.

TIP #12

Take advantage of training

Concur provides a lot of options for training. To make training easier to access, bookmark your Professional Training Toolkit or Standard Training Toolkit and visit often. You'll find helpful resources for both end users and admins as well as reporting trainings and on-demand options.

Interested in customized training?
Email training@concur.com anytime for a quote.

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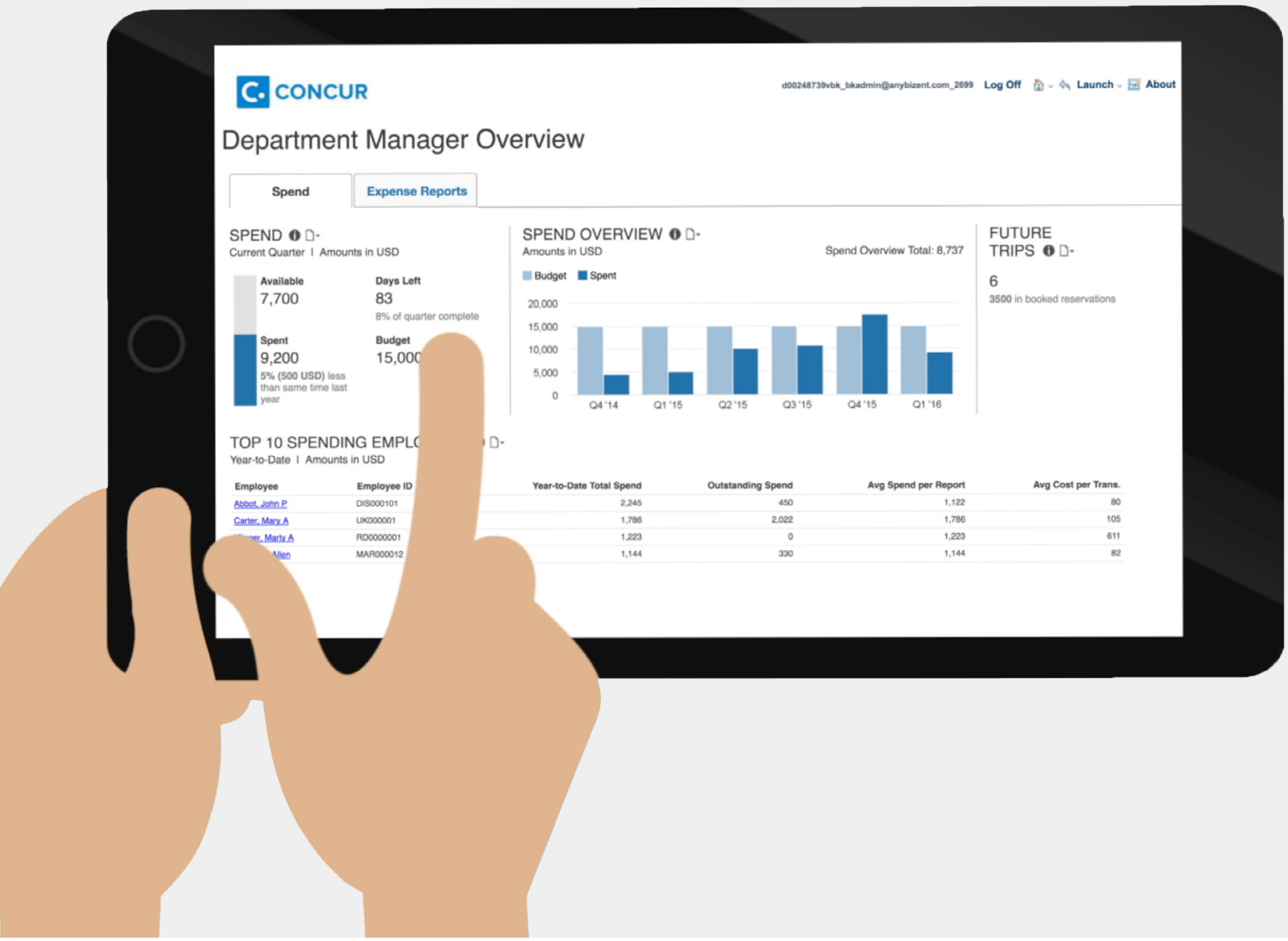
13 Expense report submission hard stop vs soft stop

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 perceived as more user friendly. For example, you can block (hard stop) an expense report from being submitted if it includes an un-itemized hotel bill. However, a “soft stop” would allow a user to submit an expense report without receipts for expenses under $25, and instead might alert the manager or target the user for audit.



14 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. This will allow you to 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). This is a great report for CBCP.

15 Refresh your Company Notes

Keep your 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.

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16 Help for employees around the world

Did you know that our Help menu documents have been translated into 21 languages? Concur has improved the support for administrators and users so make sure your organizations knows how to access the Help menu within the Concur solution. If you haven't deployed globally, speak to your Client Sales Executive about rolling out Concur internationally.

17 Review your Release Notes

Each month, innovative enhancements and client-suggested features become part of your Concur solution. Review these updates and important announcements in the monthly release notes for your products. See both Professional and Standard admin summaries. Also keep tabs on updates via the What's New in Product page.

18 Assign multiple Authorized Support Contacts

Each new company is required to have at least two and up to five designated Authorized Support Contacts (ASCs) to gain Admin access to the Client 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 the Concur Support Portal" in the Knowledge Base for full instructions.

19 Payment Type Analysis for corporate cards

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. Determine what factors are contributing to low adoption (e.g. geography, culture, features) and take action. Find Payment Type Analysis in the Expense Processing folder.

PRODUCT SPOTLIGHT

Expense Pay — Expense Pay streamlines the expense reimbursement process by automatically paying employees and corporate cards, reducing processing time and eliminating manual intervention—allowing employees to focus on what matters most. The end-to-end automated process validates expenses against your policies prior to payment, giving you effortless control.

TIP #20

Turn on split expense report approval

Consider turning on the “Split Expense Report Approval” feature in Concur. 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) is separated and added to a new expense report automatically.

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21 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.

22 Schedule a report

Utilize report scheduling to run a report each month for last month's data. In the report studio, use the pre-defined filter "Last Month" in the data warehouse. You can schedule the report by day, week, month or more, which will help you stay on top of a specific business metric.

23 Track your monthly expense reports

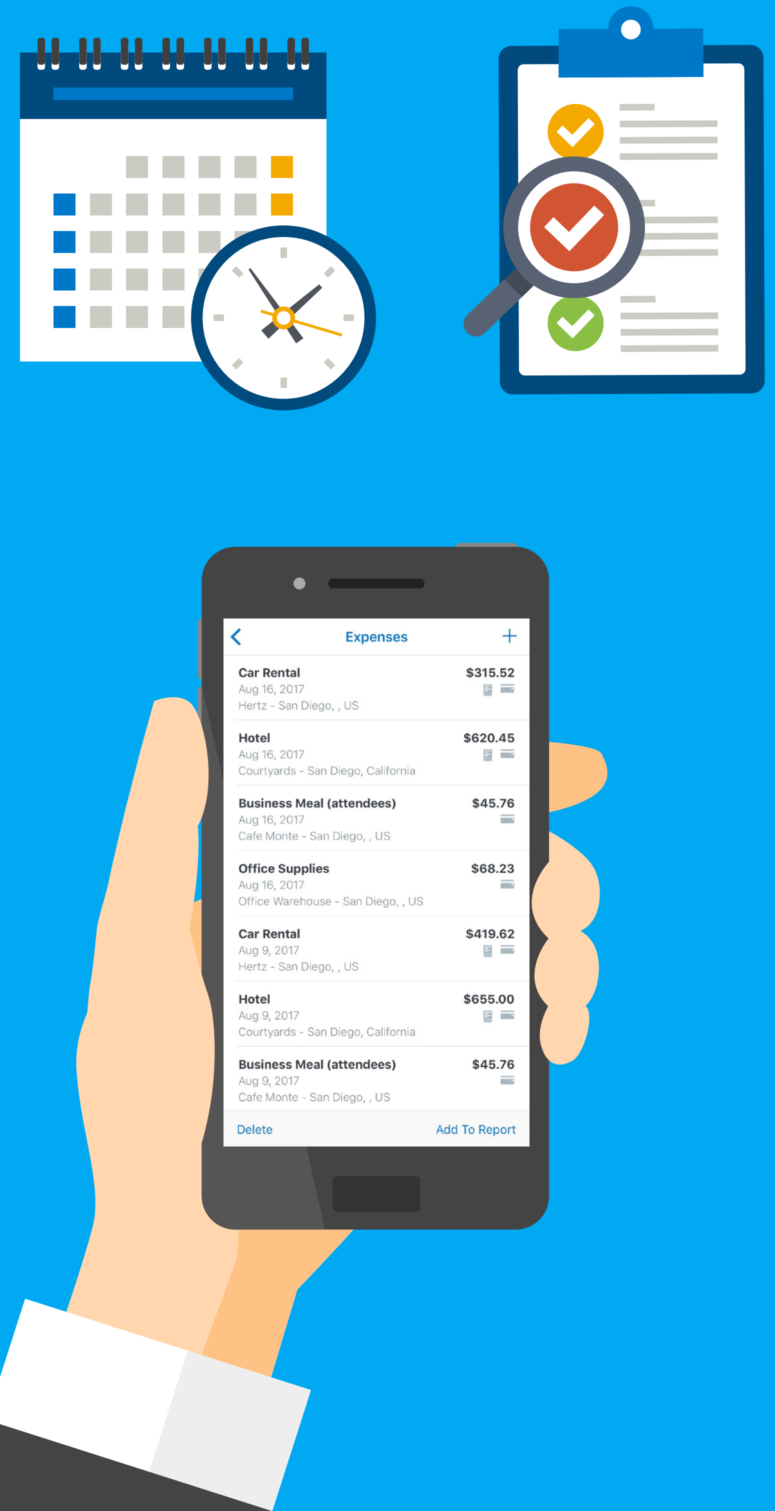
Quickly see how many expense reports your organization is submitting with the usage reports. Find the Billed Transaction Reconciliation (Month) report located in Reporting > Standard Reports > Administration folder.

24 View your Expense Spend Management dashboard

The Expense Spend Management Overview dashboard provides key metrics for your organization's expense reports and expense report life cycle at a glance. The dashboard can help track how key metrics are trending, the impact on cash flow, and help you to evaluate the need to change your expense report process.

25 Create a custom field cheat sheet

In some reports, Custom Field labels (often cost centers, divisions or departments) don't appear, instead you will see their code, Create a cheat sheet and keep it handy so you know which custom fields belong to which value.



Cut costs. Save time. It's common sense.
Concur gives you

Spendtelligence

Being able to confidently navigate your Concur solutions and quickly get answers to questions helps you save time and money. All of this means higher Spendtelligence for you and your teams.

For more information on any of the product spotlights featured, please reach out to your Client Sales Executive.

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