

# 6 WAYS | to get the most from Concur Invoice


## 1 Communicate early and often

When rolling out your new system, help employees adopt by:

- ✓ Keeping the lines of communication open
- ✓ Empowering team members to take action
- ✓ Collecting feedback as you go



## 2 Keep learning with on-demand training and resources

Educational tools are available within Concur Invoice—located throughout your solution, specific to the area you're working on. Look for the  symbol to access admin guides, toolkits, release notes and more.

## 3 Make the invisible visible

To get the most out of Concur Invoice, take full advantage of the Invoice reports and analytics available to you within your Cognos Reporting Tool—just click on the Reporting tab at the top of your Concur site.

**Top Reports we recommend to get started:**

- ✓ Invoice Billed Transaction Report
- ✓ Purchase Order List Report
- ✓ Request Accrual Report



## 4 Capture invoices two ways

You choose how you'd like to receive and capture vendor invoices.

- ✓ **Concur-Managed Capture** – Concur validates, scans and uploads all invoices and you are assigned a dedicated Concur resource for questions and support
- ✓ **Client-Managed Capture** – You are responsible for the validation, scanning and uploading of all invoices into Concur



## 5 Pay vendors with a credit card for even more flexibility

Easily pay vendors by triggering an email voucher on the optimal day-to-pay, authorizing them to charge the corporate/purchasing card.



## 6 Triple your matching power

3-Way Match means you can automatically link invoices, purchase orders and corresponding receipts to provide visibility into goods and services received—ensuring you only pay for what you received. Concur clients who use the 3-Way Match capability significantly reduce errors, and increase speed and efficiency.



**Contact your Client Success Manager for more information.**