



SAP Concur 

SAP Concur Case Study

Concur Expense | Concur Invoice | Consultative Intelligence

## **Code42 Software** Shaves Days Off of Its Expense and Invoice Processing Times with SAP Concur

Moving from a paper-based to an electronic invoice and expense process improves efficiency, accuracy and the user experience.

# Quick Facts

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## Company Name

Code42 Software

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## Solutions

- Concur® Detect
- Concur® Drive
- Concur® Expense
- Concur® Invoice
- Concur® TripLink
- Consultative Intelligence
- Expense Pay
- Expenselt
- Invoice Processing
- Purchase Requests for Invoice
- Services Administration
- User Support Desk
- App Center Partner: Wipfli

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## Industry

Information Technology

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## Company Size

500 Employees

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## Location

Minneapolis, MN

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## Why SAP Concur and Code42?

Code42's AP department wanted to centralize and streamline its operation, improve efficiency and gain complete visibility into spend. SAP Concur delivered the automated solutions Code42 needed to do away with paper-based expense and invoice processes, increase productivity and speed reimbursements and payments.

## ABOUT CODE42

Founded in 2001, Code42 is the leader in insider risk detection, investigation and response. Native to the cloud, Code42 rapidly detects data loss, leak, theft and sabotage as well as speeds incident response. With Code42, security professionals can protect corporate data and reduce insider risk while fostering an open and collaborative culture for employees. More than 50,000 organizations worldwide, including the most recognized brands in business and education, rely on Code42 to safeguard their ideas.



# The Challenge: Centralize and Simplify Finance Operations

Global cybersecurity leader Code42 is committed to keeping its clients' data protected from insider threats. To be effective, its technology and employees have to move fast to **stay one step ahead of the next potential attack** or careless click of the mouse that could put trade secrets at risk of falling into the wrong hands.

Although the fast-growth company moved at warp speed, back in 2013, Code42's AP department wasn't quite as agile—hindered by an **inefficient, paper-based expense process** that slowed reimbursements and consumed most of the two-person department's day.

“At the time, it was a manual process. Everything came in by email or regular mail. We had to go through each report, tally the receipts, compare it to what was entered, and re-key the data into our Intacct ERP before cutting a check,” explains Kevin Wright, accounts payable manager for Code42. “It was taking about three-and-a-half-weeks from the time we received the expense report until the time it was paid.”

At a volume of 300 reimbursement requests per month, this wasn't a sustainable model for a small team at a growing company. Not only were employees waiting too long to recoup their money, but this paper-based system made it difficult to **manage compliance or get an accurate view of expense spend**. It also limited the time Wright had to spend on analysis, process improvements or other, more strategic work.



“We needed an **automated, scalable solution** that would speed processing, improve visibility, and enable us to export expense data directly to our general ledger—without manual intervention.”

**Kevin Wright, Accounts Payable Manager, Code42**

# From Paper-Based to a Streamlined Expense Process

After looking at the options, Code42 leaders chose Concur Expense and had it up and running in just three weeks. “We liked the fact that it **centralized the process and gave us a single source of data**.

Employees could submit expense reports, managers could approve them, and then submit these to AP for processing—all in the same platform, with all the appropriate documentation right there,” Wright shares. “Everything flowed transparently through the system.”

To create a seamless, end-to-end workflow, Wright worked with the SAP Concur App Center partner Wipfli to **integrate the data between SAP Concur into the company’s general ledger**. And, because Wipfli is a connector and an App Center partner, no expensive customer development was required.

## EXPENSEIT FOR A BETTER USER EXPERIENCE

About 18 months after going live with Concur Expense, Wright learned about Expenselt at a user conference. After seeing the demo, he sprang into action.

“I immediately called our SAP Concur rep and said, ‘We need to turn this on right now,’” he explains. As soon as Wright got back to the office, he **rolled Expenselt out to the entire company**.

“Our salespeople went nuts over how much easier it was,” shares Wright. “You’re sitting at dinner, you get your credit card receipt for the meal, you sign it and take a picture of it with your phone. Expenselt codes the receipt and automatically enters it on your expense report for you.”

Not only did this **save employees time**, but it also

helped to reduce human error.

“We require receipts for all expenses, but, were always **dealing with missing or lost receipts**. When Expenselt came out, it took care of that problem,” Wright says. “Since then, we have implemented a new credit card program and employees can take a picture of their invoice for whatever they’re buying on the credit card, and that pulls right into SAP Concur as well. This is a really valuable tool.”

## IMPROVED REPORTING AND INSIGHT INTO EXPENSE SPEND

Wright has also made sure that company **leadership makes full use of the data** within SAP Concur for better expense management.

“Through Consultative Intelligence, I’ve created hundreds of reports that I’ve broken out by department,” he explains. “If someone wants to see his or her departmental travel spend for Q1, I already have the report established, with filters. So, I can drill down to department or specific members of a team and **sort their expense reports by expense type**.”

At a glance, the manager can compare different spend categories, like client dinners, to **see patterns or incidence of excessive spend**. The CFO can get a quarterly summary of the entire company’s travel spend to look at trends or identify where trips could be replaced with a conference call or virtual option or identify frequently used vendors for rate negotiation.

“Now we can accomplish more in less time and have access to the reporting and insight we need to more **proactively manage expenses companywide**,” Wright says.

# Transforming the Invoice Process

Code42 gained so many benefits from Concur Expense that, in 2015, it added Concur Invoice to the mix.

“Prior to bringing Invoice onboard, **we were using a home-grown system**. We would receive our invoices by mail or email, scan them, input the data and send them out to the first level manager, who sent it back, coded and approved,” shares Wright. “Then, depending on the dollar amount, it would go back and forth through the rest of the approval chain, and then it was paid.”

Concur Invoice automates that approval workflow, **eliminating all of the manual back and forth**.

“If it’s a \$3,000 invoice, it will go to approver A and B. If it’s a \$300,000 invoice, the invoice will move through approver A, B, C, D and E, then come to us approved and ready to pay,” Wright says. “There is no denying this is a time saver, but now, we have a **clear audit trail attached to each invoice**.”

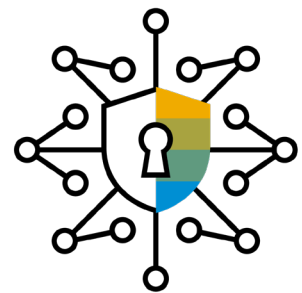
Concur Invoice also gives Code42’s management the visibility they need to better manage their budgets and stay within their quarterly allocations. As with Concur Expense, Wright worked with SAP Concur app center partner Wipfli to bring all of Code42’s approved invoices into the Intacct ERP’s AP module for payment.

“The move to Invoice and the integration through Wipfli has saved us so much time,” Wright says. “I wouldn’t hesitate to recommend SAP Concur, and Wipfli as the connector. **It’s made a big difference for us**.”

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## SPOTLIGHT ON BENEFITS:

- Reduced its expense reimbursement cycle by 16 days
- Eliminated manual re-keying
- Significantly decreased the time required to process an invoice by approximately 35%
- Enabled a two-person AP department to process 300 reimbursement requests and 400 invoices per month, and still have time for more strategic work





# Real Benefits. Measurable Results.

## FASTER EXPENSE REIMBURSEMENTS

Prior to Concur Expense, it took around three-and-a-half weeks from the time the two-person AP department received a reimbursement request to the time it was paid. “Now, reimbursements for any expense reports that we have approved in SAP Concur by the close of business of Friday are deposited into the employees’ bank accounts by the following Wednesday,” Wright explains. “When you consider the fact that we average around 300 expense reports a month, you can see how **efficient the process has become.**”

## AUTOMATED, END-TO-END WORKFLOWS

Instead of expense reports and invoices manually moving back and forth between initiators, approvers and the AP department—everything is digital, centralized and automatically flows through a prescribed workflow—ultimately populating the general ledger in an automated fashion. This process saves time, **improves accuracy and provides a clear audit trail** for all transactions.

## IMPROVED PRODUCTIVITY

Before SAP Concur, a two-person AP staff spent the bulk of their time processing the 300 reimbursement requests and 400 invoices they received each month. By eliminating manual steps and re-keying, they can now handle the same volume of work, and still **spend time on more strategic projects.**

## INCREASED VISIBILITY INTO SPEND

Because all of the expense and invoice data is centralized in one system, the AP team and company management have **full visibility into spend category, department, organization or individual**, at any given time. This transparency not only makes it easier for department heads to keep budgets in line, but it enables the CFO to get a big picture of what’s been spent, and what’s been committed, in case budget adjustments are needed.

## IMPROVED COMPLIANCE

By making it easier for travelers to capture receipts via mobile devices and automatically populating this information for reimbursement requests, the AP team rarely sees a request that comes in without the supporting documentation. In turn, the **user has a better experience and maintains policy compliance.**

# A Partnership Built on Trust—and Continuous Improvement

Even with the efficiency gains and improvements Code42 has seen with SAP Concur solutions, Wright is far from finished.

At the time of this writing, he's preparing to roll out Concur Locate, a **risk management and safety communication solution for duty of care**. He's also in the early stages of setting up Concur Drive, which **simplifies mileage tracking** for users and brings more consistency to mileage expense management.

“My plan is to continue to improve on what we've built with SAP Concur,” Wright shares. “Everything is running extremely smoothly. But I know if there's something I would like to see the system do, all I have to do is reach out to my established contacts at SAP Concur and see what we can do to make it happen. **We have a great working relationship**, which means a lot.”

After seven years, Wright is still as strong of an advocate for SAP Concur as he was after the first implementation.

“It just works. We're more efficient, we have more visibility and **we have the flexibility to scale**,” Wright says.





## SCALABILITY

Although Code42 has grown substantially since 2013, thanks to automated expense and invoice processes, the AP department has not had to add headcount.



## PRODUCTIVITY

Since implementing SAP Concur solutions, everyone within the expense and invoice ecosystem is more productive. The AP department isn't burdened with manual re-entry. Employees have a simpler, mobile way to track and submit expenses. Managers can more easily approve expenses and invoices and stay on top of budgets.

## ABOUT SAP CONCUR

SAP® Concur® solutions simplify expense, travel, and invoice management for greater visibility and control. For more than 20 years, these leading, innovative solutions have kept customers a step ahead by delivering time-saving tools, connected spending data, and a dynamic ecosystem of diverse partners and apps. User-friendly and business-ready, SAP Concur solutions unlock powerful insights that help businesses reduce complexity and see spending clearly, so they can manage it proactively. For more information, visit [concur.com](https://www.concur.com).



## INSIGHT

Because all of the company's expenses and invoice data is in one centralized system, Code42 leaders can more effectively drill down into that data to identify trends, spend patterns and other data that help them more effectively make budgetary decisions.



## Learn more at [concur.com](https://concur.com)

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