# Concur Invoice: Capture Processing – Dual Support

## User Guide for Standard Edition

**Last Revised: January 3, 2023**

Applies to these SAP Concur solutions:

☐ Concur Expense
 ☐ Professional/Premium edition
 ☐ Standard edition

☐ Concur Travel
 ☐ Professional/Premium edition
 ☐ Standard edition

☒ Concur Invoice
 ☐ Professional/Premium edition
 ☒ Standard edition

☐ Concur Request
 ☐ Professional/Premium edition
 ☐ Standard edition

# Table of Contents

# Revision History

| Date | Notes/Comments/Changes |
|------|------------------------|
| January 3, 2023 | Removed the note in the Overview regarding the Invoice Capture paper invoice processing service retirement that occurred on December 31, 2022. |
| October 15, 2022 | Updated guide for new self-service Invoice Capture setup. |
| July 28, 2022 | Clarified the note to the *Overview* to address the pending retirement of the paper invoice processing service of Invoice Capture on December 31, 2022. |
| July 16, 2022 | Added a note to the *Overview* to address the pending retirement of the paper processing service of Invoice Capture on December 31, 2022. Minor edits throughout. |
| February 17, 2022 | Minor edits; cover date not updated |
| January 21, 2022 | Updated the copyright year; no other changes; cover date not updated. |
| March 4, 2021 | Updated the copyright year; no other changes; cover date not updated. |
| March 31, 2020 | Added information about clients being able to process their own invoice batches if they have Concur-Managed Capture processing. |
| January 8, 2020 | Updated the copyright; no other changes; cover date not updated. |
| July 9, 2019 | Removed "SAP Concur" from title. No other changes. No revision date update. |
| February 9, 2019 | Menu changes, SAP Concur screenshots, SAP Concur brand change, and copyright change. No term changes required. |
| April 11, 2018 | Changed the check boxes on the front cover; no other changes; cover date not updated. |
| November 4, 2017 | Updated guide to include new **Product Settings** page, which replaces the Setup Wizard. |
| December 13, 2016 | Changed copyright and cover; no other content changes. |
| December 5, 2016 | Updated the *Permissions* section and guide content to new corporate style; no content changes. |
| April 15, 2016 | Addition of the reprocessing feature allowing change of Capture mode. |
| August 14, 2015 | New guide. |

# Invoice Capture Processing – Dual Support

**NOTE:** Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

## Section 1: Permissions

A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (*view* but not *create* or *edit*).

If a company administrator needs to use this feature and does not have the proper permissions, the Is Invoice Admin role has not been assigned to the administrator on the **Users** set up page.

## Section 2: Overview

Invoice Capture is an optional feature that supports capture processing and validation of invoice data and generation of an invoice by using Optical Character Recognition (OCR).

Invoice Capture offers three options for managing capture processing:

- **Concur Managed** – Managed, fee-based where SAP Concur staff performs the verification of OCR results on behalf of the client

- **Client Managed** – Free, client-managed feature of Invoice Management that lets the client self-manage the verification of OCR results

- **Dual Support** – When a client uses both Concur Managed and Client Managed options simultaneously

Options to work with both Concur Managed and Client Managed types of Invoice Capture are available in the user interface, which is designed to allow easy identification, set up, and management of either capture type, or for both management types simultaneously.

For each method, the client provides suppliers with a unique SAP Concur-issued email to which invoices can be sent. Alternatively, the invoices can be mailed, scanned, and uploaded. From there, OCR is performed by the system. Either the client or SAP Concur staff performs verification of OCR results, after which each invoice is saved and advanced to the beginning of the workflow process.

Clients who use Concur Managed or Dual Support (Concur-Managed and Client-Managed) can process their own invoice batches.

### *About Dual Support*

This document includes instructions for using the Dual Support feature. Dual Support lets a client process their emailed or uploaded batches using either capture method. When this feature is enabled, additional options appear that let the admin assign a capture type to one or more batches.

When activated, this feature lets Invoice Capture processing users configure and apply capture-specific options for batches they want to process based on either capture type. This means that you can apply a capture method to a batch and the system will handle each batch according to the rules established for that capture type.

This can be useful, for example, if a company has a global presence with limitations in invoice processing at some locations, but the ability to manage invoice volume at other locations.

    More detailed information is included in the following guides:

- *Concur Invoice: Capture Processing (Client-Managed) Setup Guide for Standard Edition*

- *Concur Invoice: Capture Processing (Client-Managed) User Guide for Standard Edition*

## Section 3:  End-User Experience

With both capture types enabled, the user sees options that enable them to work with different batch types using options specific to the capture type.

### Capture Batch List Page

Users can filter the batch list view to the type of capture, shown in the **Capture Type** column.

### *Reprocessing a Batch in the Batch List Page Under Dual Support*

When reprocessing a batch in the Dual Support environment, an Invoice Verifier can change the capture type from *Client Managed* to *Concur Managed*, and vice versa, by using commands on the **Actions** menu.
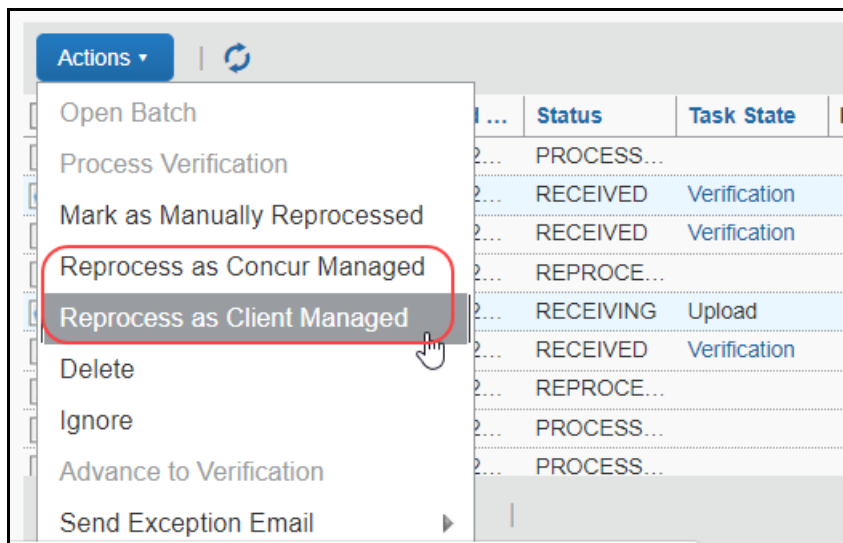


This flexibility allows the administrator to move a batch from one mode to the other depending on working conditions, for example:

- To expedite one or more batches by taking ownership under Client Managed

- To relieve workload by assigning one or more batches to Concur Managed

**NOTE:** Selected commands available using the **Actions** button are restricted when selecting different capture types since certain commands cannot logically be executed on differing capture types.

### *Process Verfication*

Users who use Concur-Managed Invoice Capture or dual support can process their own invoice batches. To do this, users may right-click an invoice batch in the **Capture Batch List** page and then select the **Process Verification** option. This opens the invoice batch in the **Verification** window where they can process their invoices.
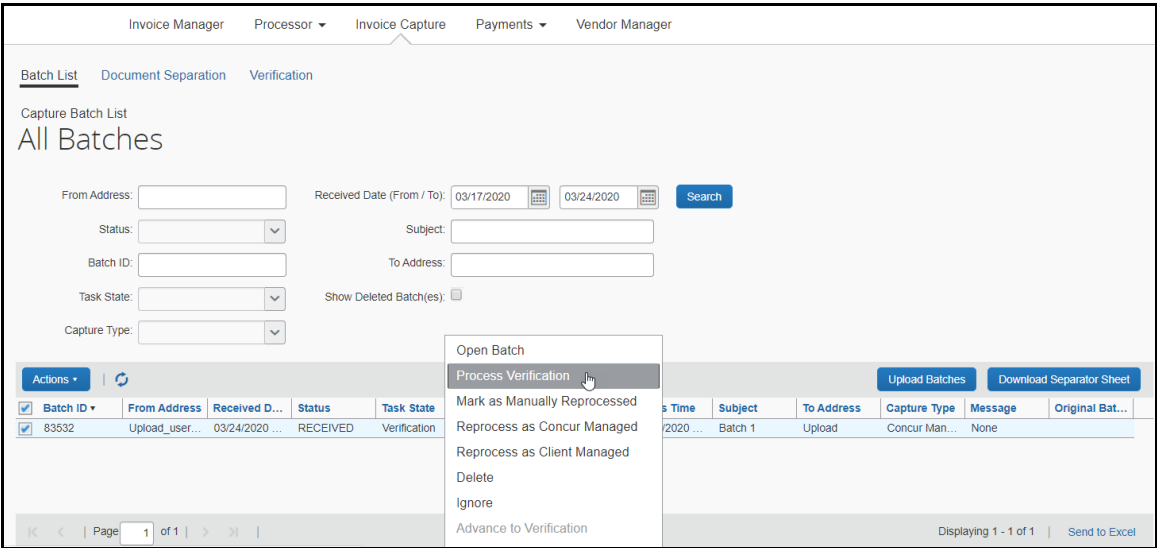


Clicking the **Process Verification** option opens the **Verification** page.

### Upload Batch Page

When uploading a batch, the user has the option of specifying the batch type by selecting either *Concur Managed* or *Client Managed* from the **Capture Type** list.



**NOTE:** Once a batch is assigned a capture type and enters the system the batch type can only be changed by reprocessing the batch and selecting a reprocessing type on the **Actions** menu. This applies to both Client Managed and Concur Managed methods.

# Section 4: Admin Experience

When Dual Support is enabled, administrators will see Concur Managed Verification and Client Managed Verification settings display on the **Invoice Capture Processing** page in Product Settings.

&#x1F56E; For more information, refer to *Concur Invoice: Capture Processing (Client-Managed) Setup Guide for Standard Edition.*

# Section 5: Configuration/Feature Activation

The **Invoice Capture Processing** page of Product Settings is visible only when enabled by SAP Concur staff. Contact your SAP Concur account manager or SAP Concur support if your company is interested in using the Invoice Capture feature.

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