

Concur Invoice: Email Reminders

Setup Guide

Last Revised: August 17, 2019

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

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Revision History

Date	Notes/Comments/Changes
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January 21, 2022	Updated the copyright year; no other changes; cover date not updated
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July 3 2018	The Copy to Approver and Copy to Employee fields are updated to note that a copy of an email reminder may be sent to an approver or employee
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December 5 2016	Updated the <i>Permissions</i> section and guide content to new corporate style; no content changes.
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March 18 2016	Updated the image of the email example; no other content changes
October 8 2015	Add more description for <i>Once when condition is met</i>
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May 15 2015	Updated the images to the enhanced UI and made general updates to the content
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Date	Notes/Comments/Changes
December 28 2011	Made rebranding and/or copyright changes; no content changes
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Email Reminders

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, they should contact the company's SAP Concur administrator.

In addition, the administrator should be aware that some of the tasks described in this guide can be completed only by SAP Concur staff. In this case, the client must initiate a service request with SAP Concur support.

Section 2: Overview

Email Reminders is a tool in the Invoice Configuration administrator used to set up email messages to be sent on an interval basis to remind employees to act on a specific action, such as:

- **Overdue Disbursement:** A company may want to enforce that a vendor is paid within a certain number of days.
- **Approving:** A company may want to enforce managers to approve invoices within a certain amount of time as defined by the company.

Email reminders send the emails to the individual based on the time intervals set within the configuration. For example, the email can be sent to an employee if the invoice was submitted seven days ago, and the approver has not approved it yet. The subject line and text message that accompanies the email can be configured and localized.

Section 3: Configuration Process

The process for setting up for email reminders is as follows:

1. **Create the rules:** On the **Rules** tab of the **Email Reminders** page, create any specific email rules for the reminder or use one of the default rules.
2. **Create the configuration:** On the **Email Reminders** tab of the **Email Reminders** page, create a new configuration. Within this configuration, you will assign the groups that this reminder will be sent to when the rules are violated.

3. **Schedule the reminders:** Email reminders are run when called from the scheduling process that the system supports. Once it is scheduled, then any email reminder created in the future is sent on that schedule. Scheduling email reminders is done in the Import/Extract Administrator tool and is performed by SAP Concur staff.

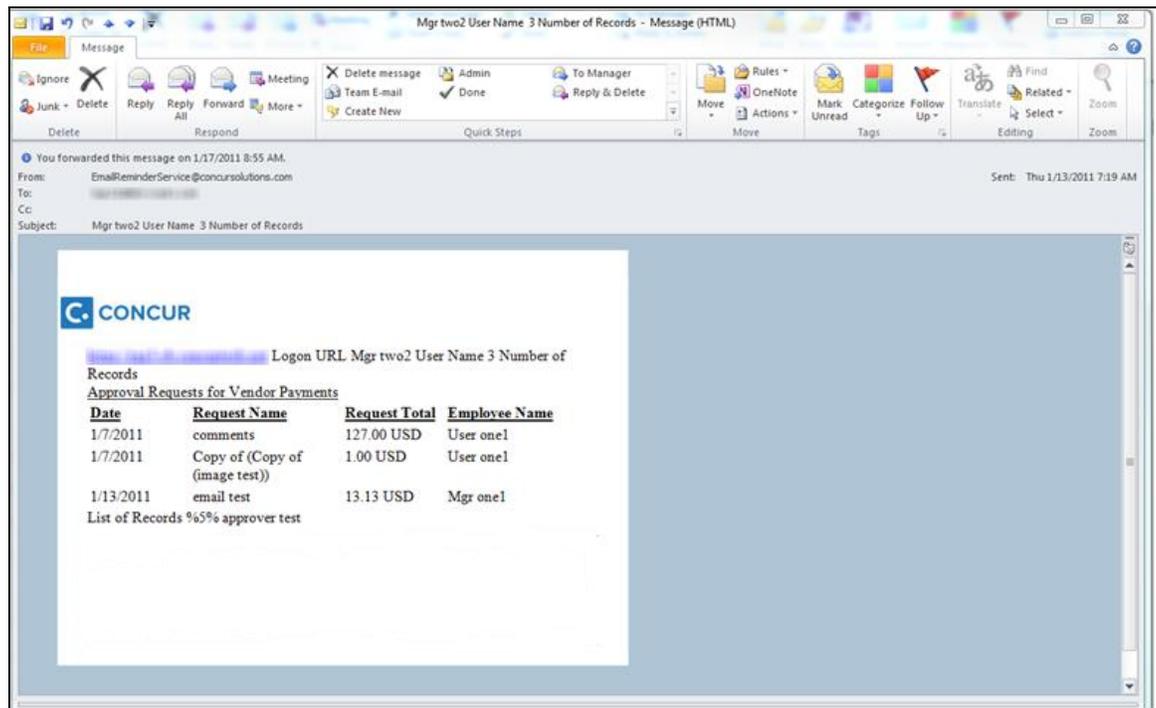
NOTE: Scheduling requires that a service request be submitted to SAP Concur support.

4. (Optional) If you have already localized the strings within the product and have created a new email message, then you may have to send the new text to your localization vendor for translation.

NOTE: This process requires that a service request be submitted to SAP Concur support to extract the appropriate strings.

Employee Experience

The employee receives an email with the administrator configured subject line and message text. This email alerts the employee that there is work or a new item awaiting their action.



The **Email Reminders** page is used to configure this email.

Email Reminder [X]

Name:

Reminder Type: [v]

Reminder Rule: [v]

Frequency: [v]

Display as From:

Email Subject:

Email Message: [v] | **B** *I* U | A⁺ A⁻ | | [v]

%2%

Please log in to %1% to approve payment requests.

Thanks.

Arch

Copy To Employee: [v]

Copy To Email Address:

Editable By: [v]

Applies To: [v]

Active: [v]

Section 4: Email Reminders Tool

The Email Reminders tool, located in Administration of Invoice, allows a Global and Group Configuration administrator to create, edit, and delete email reminders by group. Group Configuration administrators can only create, edit, and delete email reminders for the groups to which they have access permissions.

The Email Reminders tool is visible if you have the Invoice Configuration administrator (Restricted) role.

Section 5: Configuring Email Reminder Rules

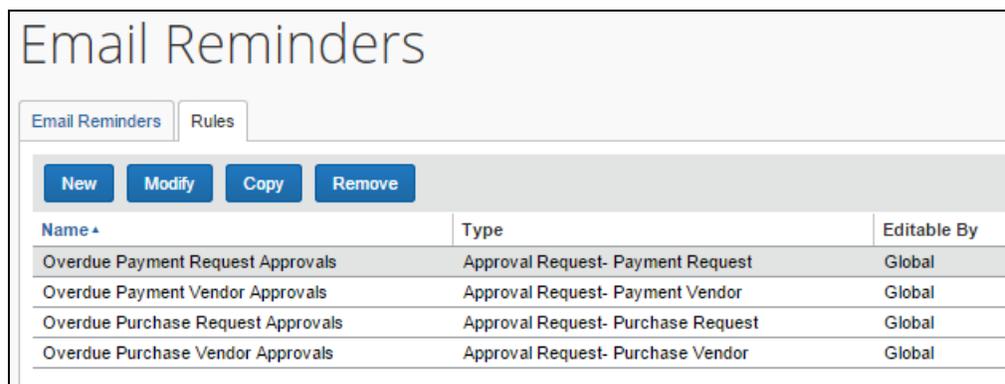
Before You Begin

When creating an email reminder configuration, you must choose a rule that dictates when that email is sent. The rules must be set up before you create the email reminder, or you must use one of the default rules that the system provides. The rules are set up in the **Rules** tab of the **Email Reminders** tool. If you intend to use the default rules, you do not have to create any new rules.

Pre-Defined Rules

The pre-defined rules are as follows:

- **Overdue Payment Request Approvals:** Invoices that have not been approved within 7 days of submission of the invoice. The employee must be an active employee.
- **Overdue Payment Vendor Approvals:** Vendor-based invoices that have not been approved within 7 days of submission of the invoice. A vendor import must be set up within the system to run before 7 days.



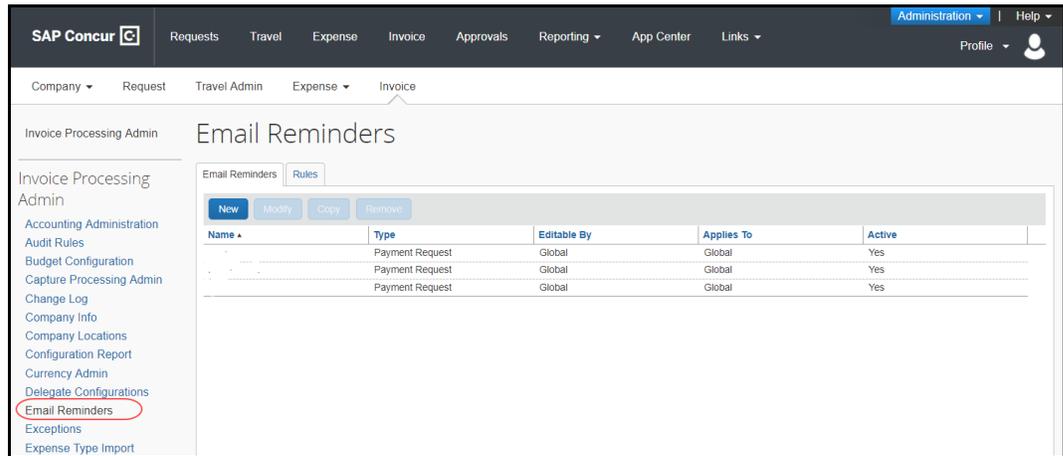
The screenshot shows the 'Email Reminders' tool interface. At the top, there are two tabs: 'Email Reminders' and 'Rules'. Below the tabs are four buttons: 'New', 'Modify', 'Copy', and 'Remove'. Below the buttons is a table with three columns: 'Name', 'Type', and 'Editable By'. The table contains four rows of pre-defined rules.

Name	Type	Editable By
Overdue Payment Request Approvals	Approval Request- Payment Request	Global
Overdue Payment Vendor Approvals	Approval Request- Payment Vendor	Global
Overdue Purchase Request Approvals	Approval Request- Purchase Request	Global
Overdue Purchase Vendor Approvals	Approval Request- Purchase Vendor	Global

Access Email Reminders

► **To access Email Reminders:**

1. Click **Administration > Invoice**.
2. Click **Email Reminders** (left menu). The **Email Reminders** page appears.

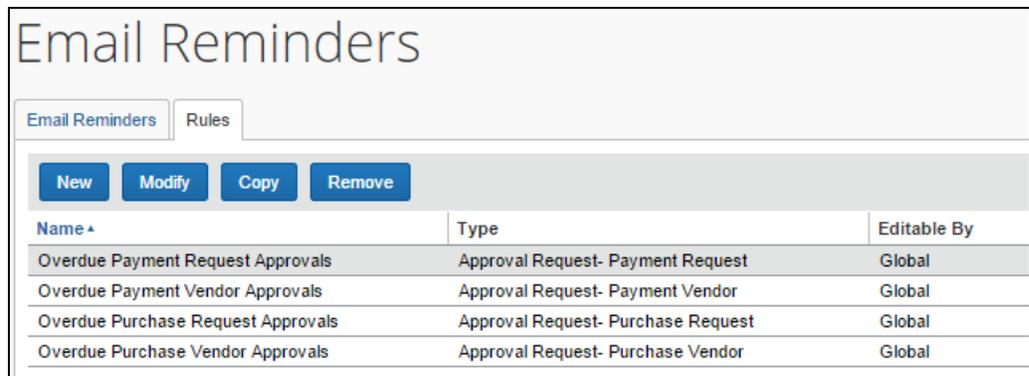


Create Reminder Rules

Group administrators can only create email reminder rules if given "create" rights. If they do not have permissions, then the **New** button will not appear.

► **To create email reminder rules:**

1. In **Email Reminders**, click the **Rules** tab.



2. Click **New**. The **New Reminder Rule - Step 1** page appears.

3. Complete all required fields.

Field	Description
Name	Type a name of the email reminder configuration.
Reminder Type	<p>Select the type that this email reminder applies to. Reminder Type serves as a category for the rules that apply to that type as well as the action that the reminders are activated on:</p> <ul style="list-style-type: none"> • Approval Request - Payment Request: When an invoice has a status of Pending Approval. • Approval Request - Payment Vendor: When a vendor-based invoice has a status of Pending Approval. • Payment Request: For invoices that have been approved and have not been both extracted and had the invoices marked as received. <p>These options categorize the rules for when creating an email reminder, for example, if you choose Payment Requests, then only the rules you created where the Reminder Type is Payment Requests will appear as rules from which you can select.</p> <p>Selecting a type also filters the options available when creating the rule using the condition editor on the next page.</p>
Editable By	<p>Select the group rights that an administrator must have to modify this rule.</p> <ul style="list-style-type: none"> • If you select <i>Global Group</i>, then the rule can be edited or deleted by any employee assigned to administer the Global Group. All other administrators assigned at lower levels in the hierarchy can copy this rule, but not edit or delete it. Depending on your rights, you may not be able to select Global Group. You are only allowed to select groups beneath you. • If you select one or more groups in this field, such as Global Group>United States and Global Group>Europe, then the group administrator must have rights for both Global Group>United States and Global Group>Europe. Through inheritance, they will also have rights to edit anything beneath United States and Europe. If the Invoice Configuration administrator only has rights for Global Group>United States, then this rule can only be viewed and copied. If the administrator has rights for one or more groups above Global Group>United States and Global Group> Europe, they will also have rights to both of these.

4. Click **Next**. The **Conditions - Step 2** page appears.
5. Complete the condition for this rule:
 - ◆ Select the appropriate **Data Object**.
 - ◆ Select the **Field/Value** from the helper pane.

- ◆ Select the appropriate **Operator** from the helper pane.
 - ◆ Select the next appropriate **Data Object**.
 - ◆ Select the **Field/Value** from the helper pane.
 - ◆ Continue these steps until the condition is created.
6. Click **Finish**. You are returned to the **Rules** tab.

Copy Reminder Rules

▶ *To copy rules:*

1. In **Email Reminders**, click the **Rules** tab.
2. Select the rule to copy, and then click **Copy**.
3. Edit the new copy using information from *Creating Reminder Rules* in this document.

Edit Reminder Rules

Group administrators can only edit email reminder rules if given "create" rights. If they do not have permissions, then the **Edit Reminder Rule** page will be read-only.

▶ *To edit email reminder rules:*

1. In **Email Reminders**, click the **Rules** tab.
2. Select the rule to edit, and then click **Modify**.
3. In the **New Reminder Rule - Step 1** page make the desired edits.
4. Click **Next**, and, on the **Conditions - Step 2** page, make the desired edits.
5. Click **Finish**.

Delete Reminder Rules

If a rule is deleted that is currently associated with an email reminder, it will deactivate the email reminder. The email reminder will still exist but will not be active. If you want to associate another rule with that email reminder, click the name of the email reminder on the **Email Reminders** tab and select a new rule.

▶ *To delete email reminder rules:*

1. In **Email Reminders**, click the **Rules** tab.
2. Select the rule to delete, and then click **Remove**.
3. In the confirmation message, click **Yes** to dismiss the message.

Section 6: Configuring Email Reminders

A rule must be created before you create an email reminder, however, you can use one of the default rules.

Create Email Reminders

▶ **To create email reminders:**

1. In **Email Reminders**, click the **Email Reminders** tab.
2. Click **New** to open the **Email Reminder** window.
3. Complete all required fields.

Field	Description
Name	Type a unique name of the email reminder configuration.
Reminder Type	<p>Select the type that this email reminder applies to. Reminder Type serves as a category for the rules that apply to that type as well as the action that the reminders are activated upon:</p> <ul style="list-style-type: none"> • Approval Request - Payment Request: When a cash advance request has a status of Pending Approval. • Approval Request - Vendor Request: When a vendor-based invoice has a status of Pending Approval. • Payment Request: For invoices that have been approved and have not been both extracted and had the invoices marked as received. <p>Only the rules with this reminder type will appear in the next field.</p>
Reminder Rule	<p>Use the Reminder Rule helper to select a previously created email reminder rule for the selected Reminder Type.</p> <p>NOTE: The Email Reminder Rules section of this tool is used to create any new rules.</p>

Field	Description
Frequency	<p>Select how often you want this email to be sent once a rule is violated:</p> <ul style="list-style-type: none"> • Daily (weekdays only) • Daily • Every x days • Specific days of the month • Once when condition is met <p>NOTE: To ensure that reminders are sent according to the selected frequency, SAP Concur sets a "flag" whenever a reminder is sent. However, for performance reasons, the flags are removed every 60 days. This means that a "once only" reminder <i>could</i> be sent once every 60 days. To prevent recurrence of the reminder, SAP Concur recommends that you add a time- or status-based condition to the reminder rule (for example, add an additional condition on a date field like Create Date and Within Today minus 59 – or use a status equal to the final workflow step).</p> <p>NOTE: When an email reminder is sent, multiple occurrences of the same reminder for the same recipient are grouped together. For example, if an approver has three invoices overdue for approval that are identified when the Overdue Approvals reminder is sent, the approver only receives a single email reminder for all three invoices rather than three separate reminders.</p>
Number of Days	<p>This field appears <i>only</i> if you clicked <i>Every x days</i> in the Frequency field.</p> <div data-bbox="753 1136 1471 1348" style="border: 1px solid black; padding: 5px;"> <p>Reminder Rule: <input type="text" value=""/></p> <p>Frequency: <input type="text" value="Every x days"/></p> <p>Number Of Days: <input type="text" value=""/></p> <p>! This field is required</p> </div> <p>Enter the number of days since the last email reminder that this email is to be sent.</p> <p>NOTE: An email will be sent initially once the condition is met, then every "x days" as specified.</p>

Field	Description
Specific days	<p>This field appears only if you clicked <i>Specific days of the month</i> in the Frequency field.</p> <div data-bbox="753 323 1427 516" style="border: 1px solid black; padding: 5px;"> <p>Reminder Rule: <input type="text"/></p> <p>Frequency: <input type="text" value="Specific days of the month"/></p> <p>Specific Days: <input style="border: 2px solid red;" type="text"/></p> <p style="color: red; font-size: small;">! This field is required</p> </div> <p>Type a valid integer between 1 and 31. Use > for the last day of the month. For example, <i>10, 20, ></i> in the field would run the reminder on the 10th, 20th, and last day of the month.</p>
Display as From	<p>Type the name you would like the recipient to see on the notification. The @ symbol is not permitted in this name.</p> <p>NOTE: This name affects the display name only and does not affect the underlying email address of EmailReminderService@concur.com</p>
Email Subject	<p>Type the message that will appear as the Subject of the email message. There is a maximum of 255 characters.</p> <p>Use the variables available in the Helper pane to make the subject line more dynamic. You must type the actual value, such as %3% in the line rather than select it from the Helper pane.</p> <p> For more information, refer to the <i>Email Message Helper</i> section of this guide.</p>
Email Message	<p>Type the message that appears in the body of the email up to 2,000 characters (double-byte characters are counted as 2 characters).</p> <p>TIP: If you are translating this message, be sure the original message translation does not exceed the limit when translated (the German language as a good example).</p> <p>Use the variables available in the Helper pane to make the message more dynamic. You must type the actual value, such as %3% in the line rather than select it from the Helper pane.</p> <p> For more information, refer to the <i>Email Message Helper</i> section of this guide.</p> <p>NOTE: The limit for emails that use the SAP Concur notification service is 10MB. Outgoing emails that have attachments larger than 10MB are not delivered.</p>

Field	Description
Copy to Approver	<p>Email reminders to the employee may optionally send a copy of the reminder to the employee's approver.</p> <p>Select <i>Yes</i> to be able to send this email to this employee's default approver, in addition to the employee to whom the email pertains. If the email reminder is an approval invoice, then the Copy to Employee setting appears, and the email is also sent to the employee for whom the invoice is requiring approval.</p> <p>If you do not want to send an email reminder to the default approver, select <i>No</i>.</p>
Copy to Employee	<p>Email reminders to the approver regarding pending approval invoice may optionally send a copy of the reminder to the affected employees.</p> <p>Click <i>Yes</i> or <i>No</i> to indicate if a copy is to be sent to the employee represented in the item pending approval.</p> <p>IMPORTANT: Use caution with this option. If multiple items are pending the approver, each one will be listed in the email reminder. The relevant employees will all be added as cc recipients of the email to the approver, and thus will view information about items from other employees that might not be appropriate visibility.</p>
Copy to Email Address	<p>Type the appropriate email address. Multiple email addresses can be separated by a comma or a semicolon.</p>
Editable By	<p>Select the group rights that an administrator must have to modify this reminder.</p> <ul style="list-style-type: none"> • If you select <i>Global Group</i>, then the reminder can be edited or deleted by any employee assigned to administer the Global Group. All other administrators assigned at lower levels in the hierarchy can copy this reminder, but not edit or delete it. Depending on your rights, you may not be able to select Global Group. You are only allowed to select groups beneath you. • If you select one or more groups in this field, such as <i>Global Group>United States</i> and <i>Global Group>Europe</i>, then the group administrator must have rights for both <i>Global Group>United States</i> and <i>Global Group>Europe</i>. Through inheritance, they will also have rights to edit anything beneath <i>United States</i> and <i>Europe</i>. If the Invoice Configuration administrator only has rights for <i>Global Group>United States</i>, then this reminder can only be viewed and copied. If the administrator has rights for one or more groups above <i>Global Group>United States</i> and <i>Global Group> Europe</i>, they would also have rights to both of these.
Applies to	<p>Select the groups that will be able to see this reminder. Only the groups that you select will have this reminder available to them. The groups below the selected groups do not have this reminder available.</p>

Field	Description
Active	Select Yes to make this email reminder active. All email reminders are inactive by default. The emails are not sent until this is set to Yes .

4. Click **Save**. The **Email Reminders** page appears and the reminder you just created appears in the list.

Email Message Replacement Tokens

When creating an email message for a reminder, you can add dynamic text to the subject line and the email message body text. When you are completing the **Email Subject** and **Email Message** fields, a Helper pane appears to display the options you have available. Below is an example of how those options are used on the **Add Email Reminder** page. Table 1 provides a description of each option. You cannot click any of these and have them appear automatically in the field. You must manually type the variable in the location that you want that information to appear.

Table 1: Email Message Helper variable descriptions

Variable	Label Name	Description
%1%	Logon URL	The URL for the Concur Log On page.
%2%	User Name	The primary recipient of the email in this format: Firstname Lastname. This does not pertain to any Copy To recipients, such as approvers.
%3%	Number of Records	The number of applicable object records, such as number of invoices, found by the reminder rule query, which is based on the Reminder Type.
%4%	List of Records	<p>A list of the applicable object records found by the reminder rule query, based on pre-defined formats. This variable is not supported in the Email Subject field.</p> <p> For more information how these fields would appear, refer to the <i>Examples of List of Records</i> section.</p> <p>NOTE: These lists will be preceded and followed by a blank line in the email body when inserted by the system.</p> <p>The list of records for each Reminder Rule Type contain the following information in the email message:</p> <ul style="list-style-type: none"> • Approval requests: Fields based on the object to be approved, with the Employee Name as the last column. • Payment Requests: Submit Date, Request Name, Amount, Employee Name.

Copy Email Reminders

▶ **To copy reminders:**

1. In **Email Reminders**, click the **Email Reminders** tab.
2. Select the email reminder to copy.
3. Click **Modify** to open the **Email Reminder** window and make any necessary changes.
4. Click **Save**. The new reminder will appear in the list.

Edit Email Reminders

Group administrators can only edit email reminders if given "create" rights from the configuration checklist of the Invoice Configuration administrator. If they do not have permissions, then the **Edit Email Reminder** page will be read-only.

▶ **To edit email reminders:**

1. In **Email Reminders**, click the **Email Reminders** tab.
2. Click **Modify** to open the **Email Reminder** window.

3. Edit the appropriate fields.
4. Click **Save**. The **Email Reminders** page appears and the reminder you just created appears in the list.

Delete Email Reminders

▶ **To delete email reminders:**

1. In **Email Reminders**, click the **Email Reminders** tab.
2. Select the email reminder to delete.
3. Click **Remove**.

NOTE: The change takes place immediately, so any employees violating this email reminder rule will not be sent an email reminder once this email reminder is deleted.

Section 7: Scheduling Email Reminders

Email reminders must be scheduled to run at certain intervals. If you already have email reminders configured and you add a new email reminder, there is no need to update the schedule. The new email reminder will run on the same email reminder schedule that was set up prior.

If this is the first time you create email reminder configurations, you must set up the schedule to run the email reminders. Depending on your company's implementation, you may have to submit a service request to SAP Concur support for assistance with this task.

Section 8: Localizing Email Reminder Text

Email Reminder **Subject** and **Message** text is not localized in the system automatically. If you are creating email reminders for groups that access multiple languages, then you should translate the subject and message text. The system can extract the necessary strings for you to send to a localization vendor for translation.

Depending on your company's implementation, you may have to submit a service request to SAP Concur support for assistance with extracting the strings.

Best Practices When Localizing Subject and Email Message Fields

When localizing, remember that there is a 2,000-character limit to the message in the body of the email (the **Email Message** field). Since double-byte counts as 2 characters you must factor this in translation. In addition, English to other languages typically adds additional character counts (German as a good example), so this must also be considered when creating the original message in English.

