Concur Invoice: Purchase Request and Purchase Order

Setup Guide

Last Revised: February 29, 2024

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
February 29, 2024	Added a note to the *PO Number Generation* section.
October 12, 2022	Minor edits; cover date not updated
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
February 17, 2021	Updated the copyright year; no other changes; cover date not updated
April 17, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
April 10, 2020	Added notes regarding the character limits for the fields on page 24.
January 6, 2020	Updated the copyright; no other changes; cover date not updated
April 13, 2019	Updated images as part of the new user experience for Concur Invoice. Added information about budget approval.
February 9, 2019	Changed the term "payment request" to "invoice" where applicable. Performed minor edits; no other content changes.
January 29, 2019	Updated the copyright; no other changes; cover date not updated
October 24, 2018	Renamed Concur to SAP Concur where applicable. Performed minor edits; no other content changes.
September 26, 2018	Removed reference to fact sheet; no other changes.
June 14, 2018	Changed copy-down to copydown; no other changes; cover date not updated
April 27, 2018	Added information about sending purchase orders to a bill-to email address.
April 6, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
January 10, 2018	Updated the copyright; no other changes; cover date not updated
October 30, 2017	Updated image showing the vendor token.
July 29, 2017	Added information about email notifications for purchase requests.
July 8, 2017	Added information about the **Company Name without address** field in the **Purchase Order Configuration** window.
April 22, 2017	Added information about the PO Change Order feature.
March 21, 2017	Added character limit for the next sequence number of purchase orders.
March 18, 2017	Added information about the following: • Self-approval for purchase requests • Copy down of PO allocations
December 14, 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.

Date	Notes/Comments/Changes
October 14, 2016	Added information about the following: • The **URL** field • Customizable email subject
September 9, 2016	Added information about the following: • Create custom approval statuses for purchase requests • Purchase request owner visible when assign option cleared (disabled)
July 8, 2016	Added information about updated default sender address for purchase order transmission emails.
June 17, 2016	Added information about new option for items on purchase requests belonging to the same vendor.
February 19, 2016	Added information about importing and exporting ship-to and bill-to addresses.
December 11, 2015	Added information about purchase request owners being able to edit their own purchase orders.
July 10, 2015	Added information about PO-based invoices being automatically assigned to purchase request owner.
June 12, 2015	Updated the images to the enhanced UI and made general updates to the content.
April 10, 2015	Added information about the ability to add a company logo in PO Configuration and updated images to the enhanced user interface.
December 12, 2014	Added information about the following: • Automatic transmittal of purchase orders • Purchase Request Owners being able to process their own purchase orders
November 30, 2014	Integration Administrator has changed to Import/Extract Administrator; no other content changes
November 14, 2014	The following changes were made: • A Purchase Order Configuration is now "Group-aware" • An Invoice Setting can now be auto-assign invoices to the PR Requestor
September 16, 2014	Added information about the two user interfaces; no other content changes
July 11, 2014	Emphasize that a number sequence can be changed, but must be changed to numbers further along the number sequence, not earlier.
April 15, 2014	Change copyright and cover; no other content changes
April 11, 2014	Addition of ability to approve and forward a purchase request
January 17, 2014	The following changes were made: • The Authorized By, Buyer Contact, Ship To Attn, and Tax Id fields are now modifiable • A new field, Requested By, may be added to the PO form using the Forms and Fields tool • Vendor Name and Vendor Address are now copied down to the PO form
July 30, 2013	New guide.

Purchase Request and Purchase Order

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

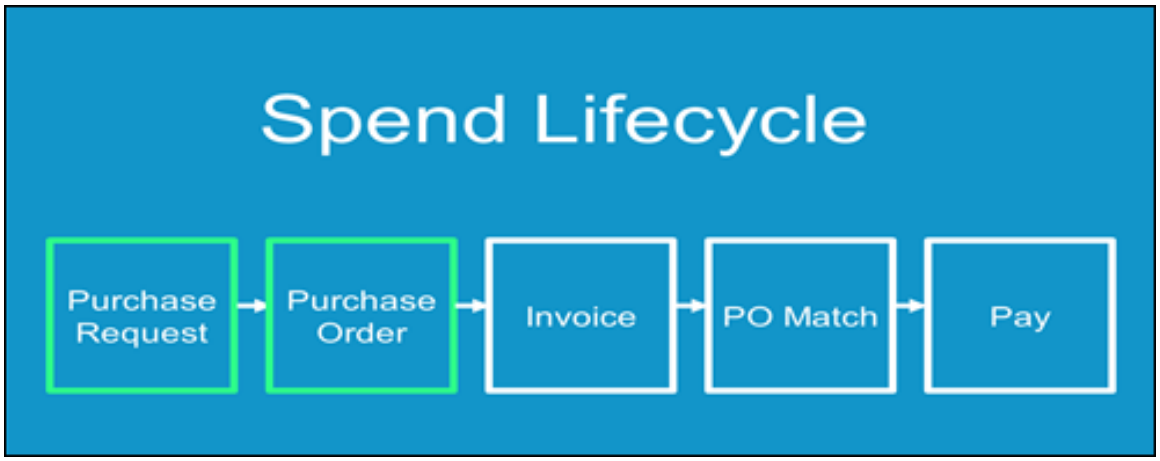
A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (*view* but not *create* or *edit*).

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

The Purchase Requests and Purchase Orders (PR & PO) feature allows clients to achieve internal spend authorization using purchase requests. These purchase requests are turned into Purchase Orders, which are documents authorizing a supplier to provide goods or services, at specified prices and quantities, in return for payment. When coupled with existing Invoice, PO Matching and Pay functionality, these features provide an end-to-end spend authorization to pay lifecycle.



Who Should Use This Feature: Client Profile

The ideal client for the Purchase Request and Purchase Orders feature reside in the SMB, Nationals, and Large Market segments. They may not yet have a dedicated procurement department, instead relying on spreadsheets or a simple tool. Their needs extend to indirect spend of services and goods, including IT, office supplies, and similar. Their end-user requestors typically know what they need and where to get it, meaning they know their vendors.

Clients who may not be ideal include those who have already made an investment in an ERP PO/Receiving module already handling procurement tasks. They also have a significant direct (inventory-based) spend and extensive Purchasing department-based function in place and are not looking to replace the system at this time.

The Invoice Purchase Request and Purchase Order Solution

Concur Invoice offers a streamlined process that answers well for clients authorizing routine spend requests. Many competitive options are large and cumbersome in comparison to the ease of the Invoice PO & PR solution, which for current users of Invoice (or Expense), is complementary and familiar in look and feel.

A question to ask is "What if you could achieve both Request and Order in a single package but avoid the investment in a full-fledged purchase order system." Additional points include:

- Lightweight & nimble, vs. challenging and overkill for the task at hand
- Oriented to the requestor's ordering experience
- A single business and spend platform
- Powerful workflow and ease-of-use (COA; AA, reminders, and timeouts)
- Mobile approval, query builder, and other features upcoming

Purchase Request Workflow

The flow of purchase request generation to final transmittal to the supplier is shown in the flowchart below:

Section 3: Configuration of Purchase Requests

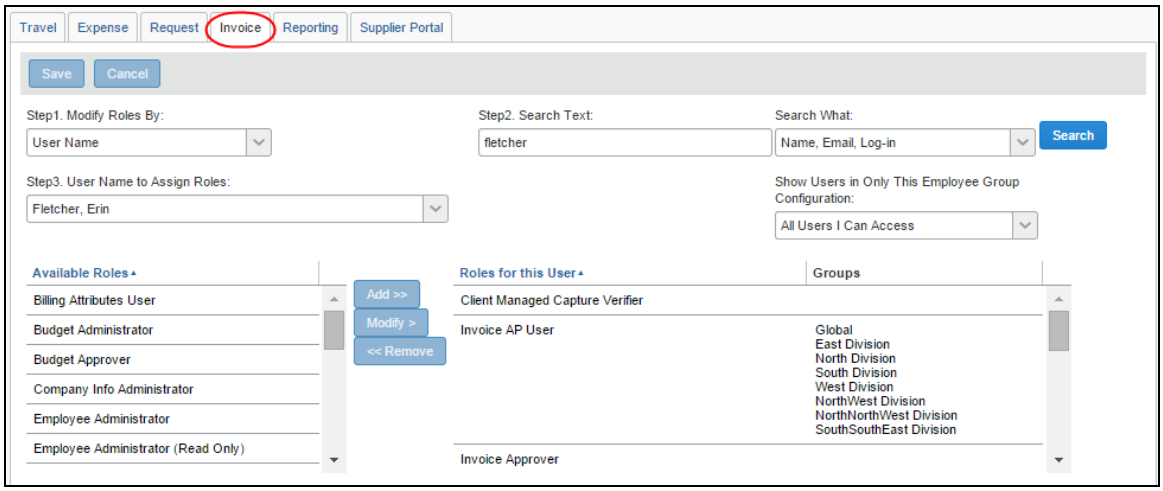
The Purchase Requests and Purchase Orders module is available to the client as a paid add-on to Invoice and cannot be used standalone. This section describes the general steps and tools required to set up the Purchase Request (PR) feature. In general, each step uses tools familiar to any administrator of Concur Invoice (forms and fields, workflow, role assignment, etc.), with some PR-specific tools as noted. Special configuration cases are called out, and the appropriate Invoice setup or user guide is referenced for further information.

Enable Purchase Requests

SAP Concur staff enables the Purchase Request feature. You must initiate a service request with SAP Concur support to have the feature enabled.

Purchase Request Roles

The User Permissions administrator can assign the following PR-specific roles using the **Invoice** tab of User Permissions (employee import options are discussed below).



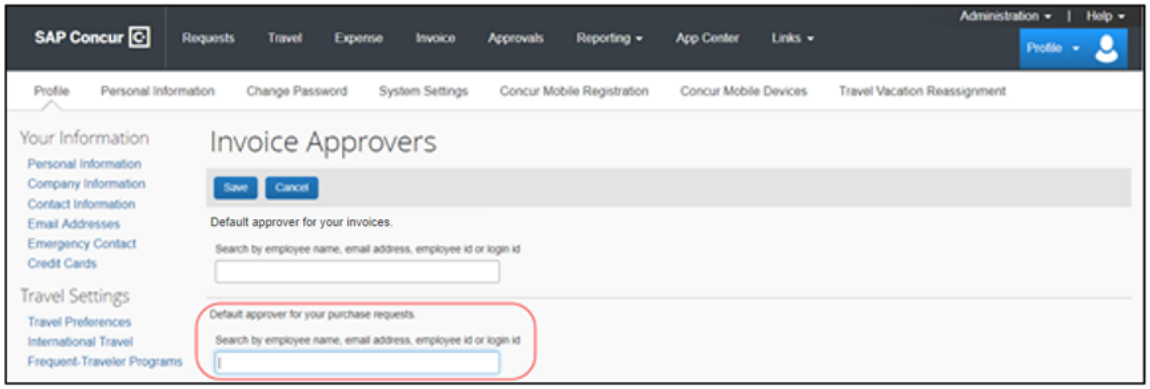
The roles are:

- **Purchase Request User:** Creates the purchase request (the "Requestor")
- **Purchase Request Approver:** Approves a purchase request created by the Purchase Request User role
- **Purchase Request Processor:** Performs general "completeness" processing tasks on purchase requests (clear exceptions, confirm Required fields completed, send back untransmitted purchase requests, etc.
- **Purchase Order Processor:** Performs general "buying" processing tasks on PO requests (correct vendor, shipping method and terms, send back both untransmitted and transmitted purchase requests, etc.)
- **Purchase Request Proxy:** Can perform all actions for any user assigned the Purchase Request User role

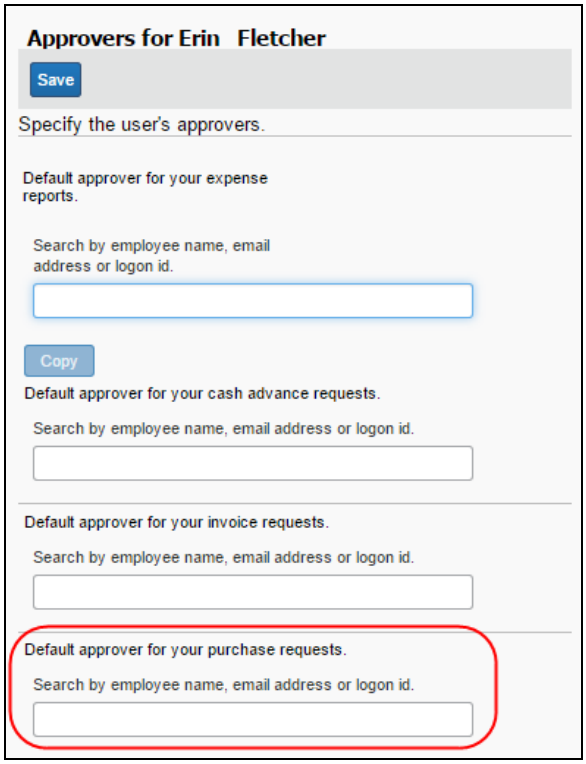
In addition, the Invoice Configuration Administrator (Unrestricted) and Invoice Configuration Administrator (restricted) roles are required to access and configure selected tools for this feature. At least one of these roles may not be available to the client, and a service request will need to be submitted to SAP Concur support.

Assign the Approver for the Purchase Request User

An approver for the PR user may be self-assigned in **Profile** > **Invoice Settings** > **Invoice Approvers** (if enabled via Group Configuration **Allow employees to edit their default approver(s)** check box).



The User Admin may do the same on behalf of the employee using **Administration** > **Company Administration** > **User Administration** > (*Search & Select*) > **Expense and Invoice Settings** > **Approvers**.



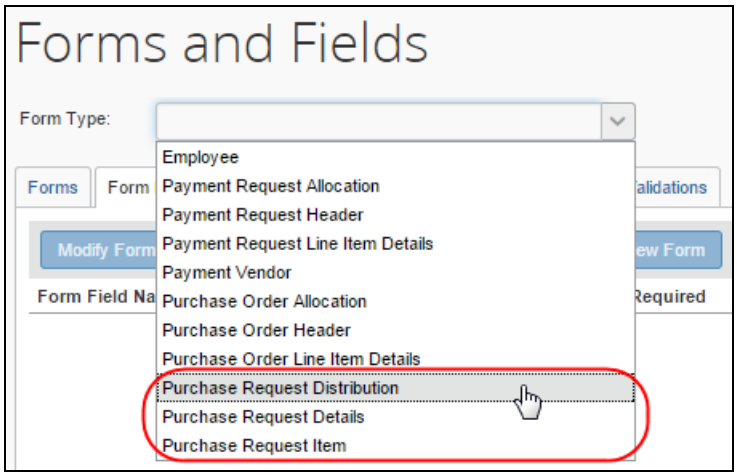
Employee Import

Selected fields are added to the Employee Import that let you assign these roles, and additionally set the default PR, Authorized, and COA approvers within the associated field record sets (360, 720, etc.). For more information, refer to the *Using the Employee Import Overnight Job* section below.

For more information, refer to the *Shared: User Admin User Guide* and the *Shared: Employee Import Specification*.

Forms and Fields

Three Purchase Request-specific forms are available on the **Forms and Fields** page in Administration. You will specify these forms when creating the PR policy.

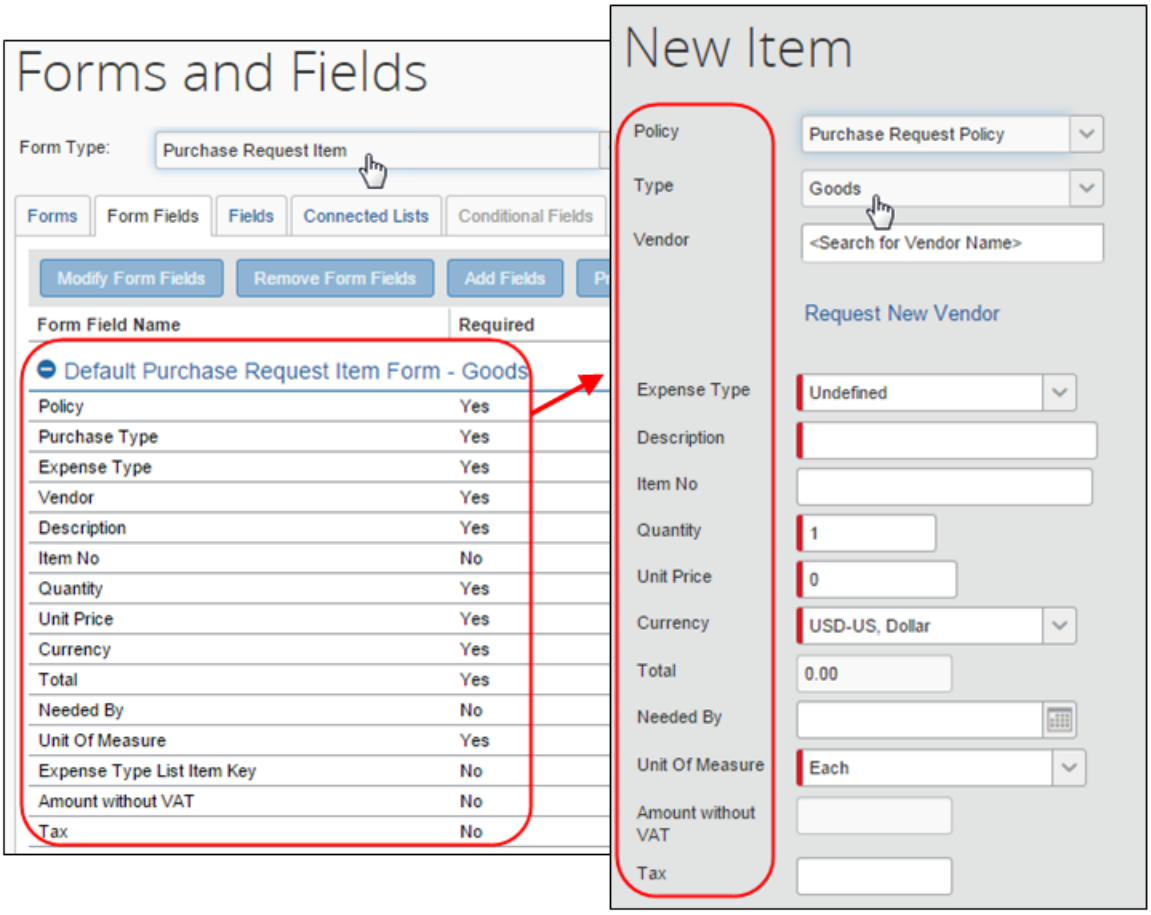


The forms are named and defined as follows:

- Purchase Request Distribution = Allocation
- Purchase Request Details = Header
- Purchase Request Item = Line Item Details

While the Distribution and Details forms should look familiar, the Purchase Request Item form incorporates "Good" or "Service" spend types, and so two different field sets are displayed for this form. Best practice and strongly encouraged is the use of both form types, Service and Good.

In the following figure, the Goods fields are shown both in Forms and Fields and in use, in **Requests** > **Purchase Request** > **Request Items**:



Fields included by default in each form are "best practice" and are worked with just as with any other form. That is, add or remove fields using **Form Fields** tab options, and elect to adjust access rights for PR roles, or change the field's label.

Hide URL Field From Purchase Request Item Form

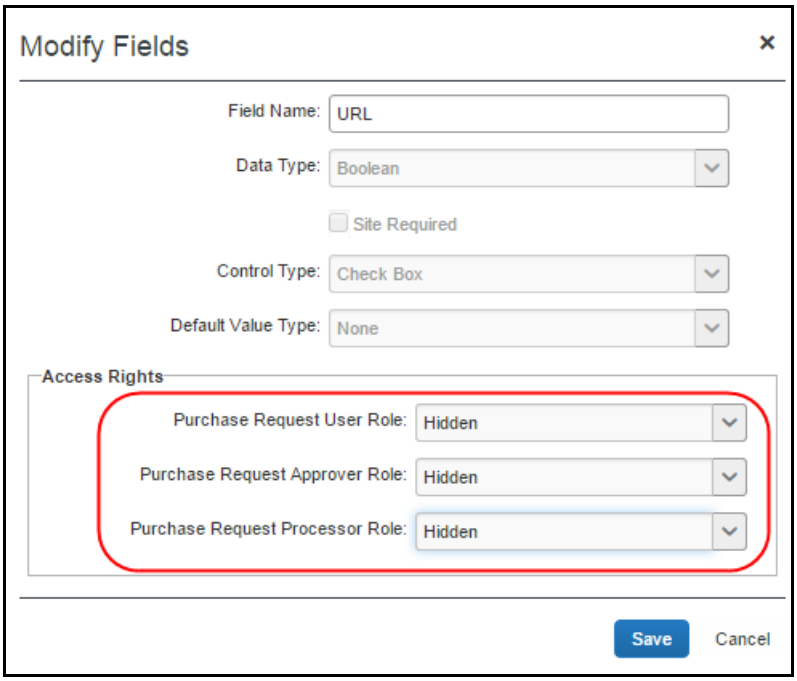
Admins can hide the **URL** field on the Purchase Request Item form in cases where the user is not using this field and thus remove unnecessary fields from the form.

▸ ***To hide the URL field:***

1. Click **Administration** > **Invoice** > **Forms and Fields** (left menu). The **Forms and Fields** page appears.
2. In the **Form Type** list, select the *Purchase Request Item* option.
3. Click the **Form Fields** tab.
4. Expand the form where the URL field is located by clicking the + icon.

5. Double-click the **URL** field. The **Modify Fields** appear.

6. In the **Access Rights** section, select hidden for the roles that should not see the **URL** field.



7. Click **Save**.

Configure Header and Item-Level Data to Copy from PR to PO

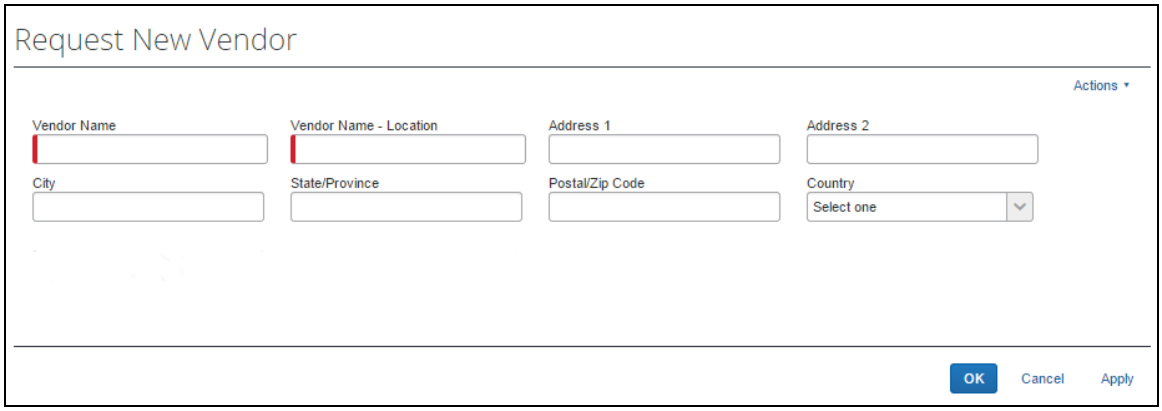
To configure Header and Item level data to copy over from the PR to the PO, use the standard approach of matching field to field across forms, selecting *Copy Down* as the value under **Field** when setting configuration in the **Connected List Definition** window.

For more information about setting up copy over for your allocation fields, refer to the *Concur Invoice: Forms and Fields Setup Guide*.

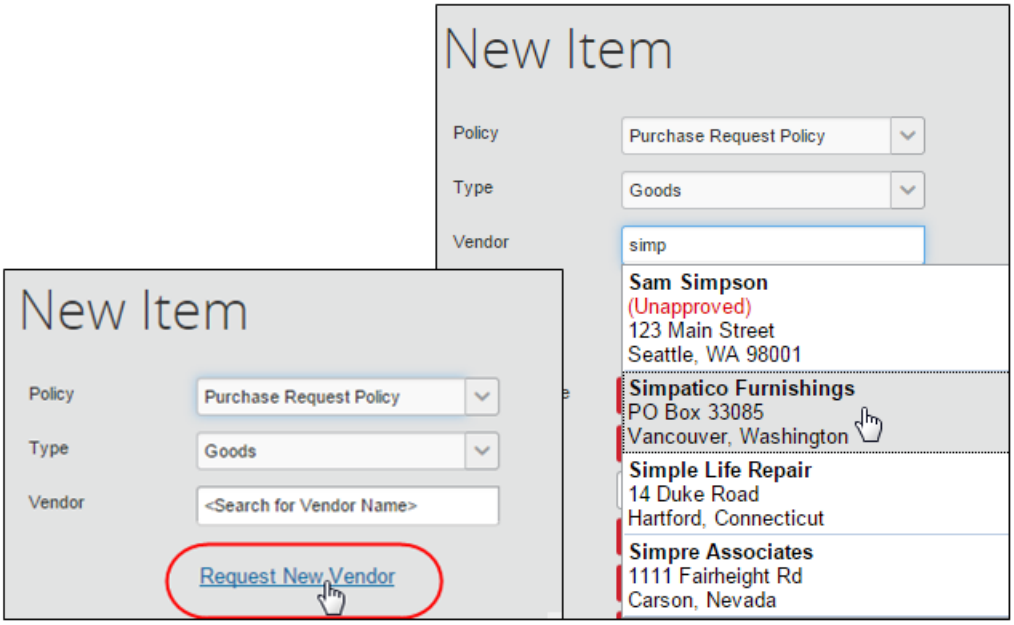
Note that for Distribution (also called Allocation) level data, no configuration is provided or is needed. All PR Distribution data will automatically copy over to the PO Distribution form, provided the forms are configured similarly. Fields will copy to their equivalent (PR Custom 1 to PO Custom 1; PR Custom 5 to PO Custom 5; etc.) and the data types must align. The forms can have different number and types of fields; if the PO Allocation form omits a custom field that is present on the PR form, it simply will not be populated automatically.

The Purchase Request Vendor Form

A non-modifiable PR-specific vendor form is added to the PR policy by copying the *Payment Vendor* form and renaming the form accordingly (*Purchase Request Vendor* as example). Select the PR vendor form when configuring the policy for form selection. The form is shown in the following figure.



This form draws on the same Vendor Master List maintained by the client. In use, the PR user can request a new vendor, or select from the list of vendors supplied by the existing Approved Vendor Import.



Note that the single existing vendor list in Concur is used for *both* Invoice and Purchase Request processes. The user selects from this list, and the Vendor Manager acts on this same list. Processing New Vendor Requests are not treated differently whether they originate from a PR or an invoice; Vendor Managers take actions like match to existing vendor, and all new vendor requests are all listed in the existing Vendor Extract.

Create a Placeholder Vendor for Users

The requestor may not know what vendor to choose when creating their purchase request, which can delay the overall process. To avoid this, the Vendor Master List maintained by the client should include a "placeholder" vendor, possibly with the name *Vendor Placeholder* or similar to ensure the requestor can remember it when they create their purchase request. Now Purchasing or a dedicated employee can replace the placeholder with the correct vendor later and prevent any delays.

To capture purchase requests with the placeholder vendor, create an audit rule with a high exception level. This way the processor will see the flagged purchase requests and either send them back to the AP User for vendor reassignment, or simply do it on their own (the processor and AP user both have permissions to do this).

PO Vendor-Specific Fields Added to Request New Vendor Form

Four vendor-specific fields are added to the Request New Vendor form. These fields are filled out by the user requesting the new vendor and are used to identify the Purchasing contact at the company you are sending the PO to.

Field Name	Definition	Required?	Description	Client Field Definition
Vendor Address Detail				
PO Vendor Contact First Name	maximum 255 characters each; case insensitive	N	This is the first name of the person who is the primary contact for this vendor address for purchase order.	
PO Vendor Contact Last Name	maximum 255 characters each; case insensitive	N	This is the last name of the person who is the primary contact for this vendor address for purchase order.	
PO Vendor Contact Email Address	maximum 255 characters each; case insensitive	N	The email address for this vendor for purchase order	
PO Vendor Contact Phone Number	maximum 25 characters each; case insensitive	N	This is a representation of the phone number of the person who is the primary contact for this vendor address for purchase order. For example: • Sally's phone • 203 655 9972 • Ext 05634	

USE THE VENDOR FORM NAME FIELD TO VIEW ALL VENDOR FIELDS

By default, the Vendor Manager is allowed to view only the Vendor form fields associated with the Group to which they belong. However, a Vendor Manager often needs to know the Vendor form assigned to each vendor so that they can view and work with the relevant fields, especially when this role is centralized. This can be done by adding the **Vendor Form Name** field to the Vendor form via the Vendor import.

For example, one record in the import feed file can be populated with the form name "Vendor Form France," and the next record with the form name "Vendor Form Australia." When the client imports the file, the Vendor Manager will be able to see the vendor form fields for the vendors in both France and Australia. The Vendor Manager can view the vendor form in the **Vendor Form Name** field, and thus work with vendors who, for example, are based in different countries and might have different vendor forms.

📖 For more information, refer to the *Concur Invoice: Approved Vendor Import V3 (Current) Specification*.

Fine-Tune the Vendor Approval Process for Client Site Requirements

Since PR and Invoice have different forms and workflow, a company does have flexibility in how stringent the vendor approval process must be at various stages. For example, if a company does not require Vendor Approval until right before Invoice Payment, they may collect very basic information on the PR Vendor form and have no PR workflow rules that check for vendor status. In contrast, if they require vendor approval early on, they may collect comprehensive required information on the PR Vendor Form (TIN; W-9) and have a PR workflow rule that prevents final approval in Processor if an unapproved vendor is attached.

TIP: Use the Count functionality to determine if a new vendor is originating on the Invoice or PR "side" by a user.

Finally, to prevent the transmission of a PO where the vendor has a status of *Unapproved*, a workflow rule can be created that prevents creation of the PO from the PR unless the vendor has a status of *Approved*.

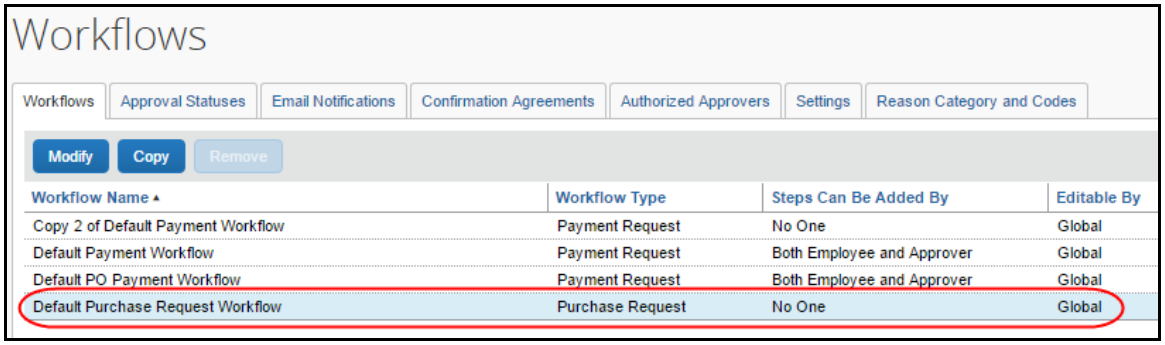
📖 For more information, refer to the *Concur Invoice: Forms and Fields Setup Guide* and the *Concur Invoice: Vendor Manager User Guide*.

Hierarchies

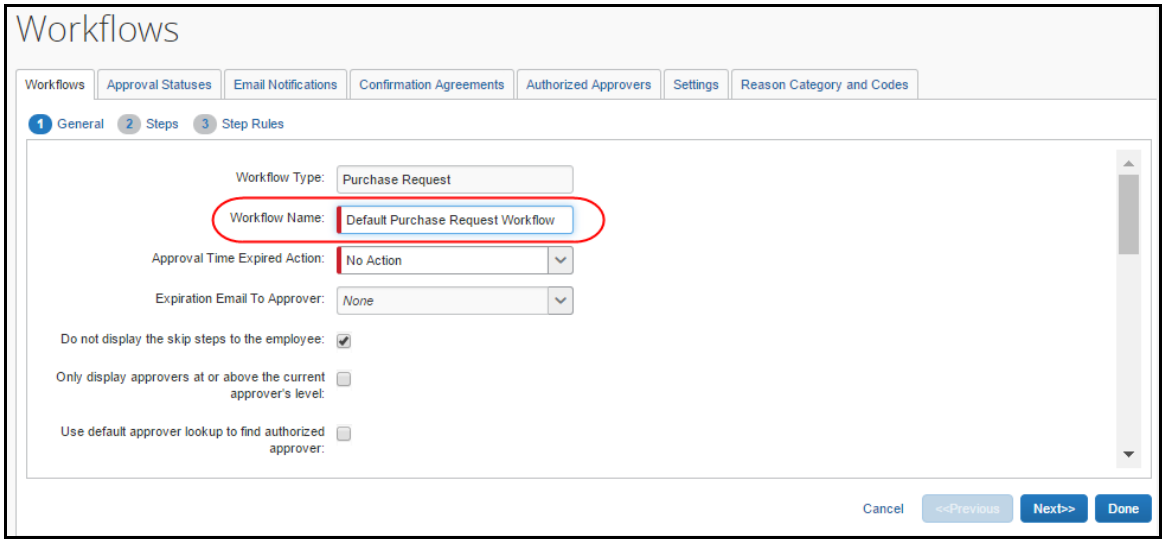
If you intend to configure the entity for either the Authorized Approver or Cost Object Approver (COA) workflows, first configure their hierarchy structure in **Administration** > **Invoice** > **Hierarchies** (explained next).

Workflow

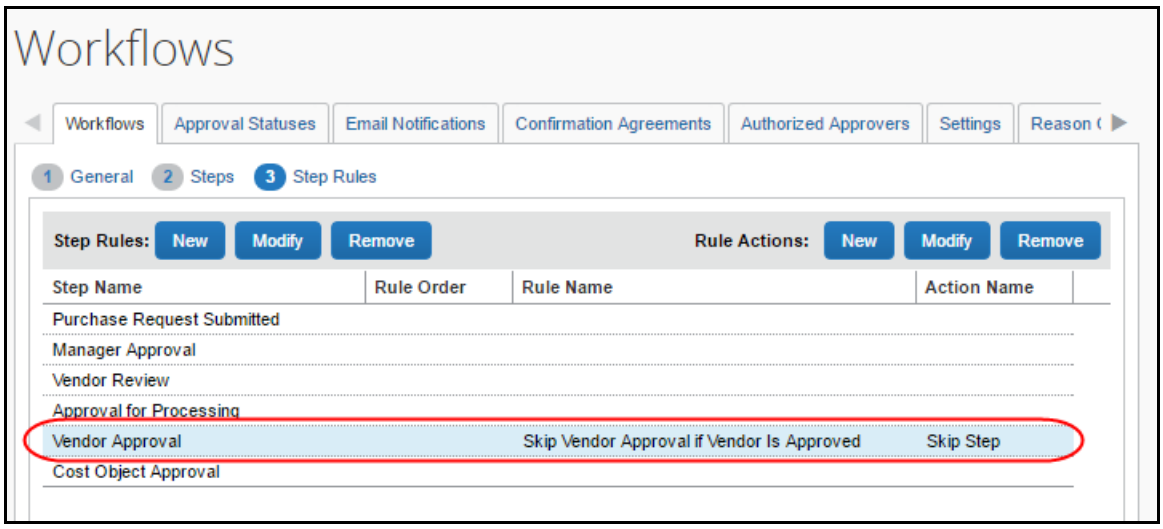
A *Default Purchase Request Workflow* option is available in **Invoice** > **Workflows** to support the PR feature.



This workflow closely matches existing workflows, with some logical variations. The figure below displays the standard Authorized Approvers, COA, Email Reminders, and Approval Timeout options famiiar to the Invoice administrator.

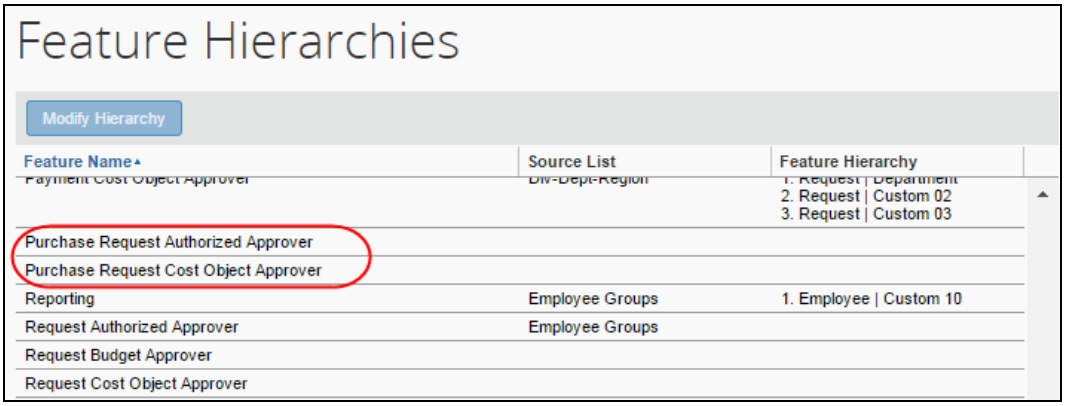


Note that, for all PR workflows, the skip step "Skip Vendor Approval if Vendor is Approved" should be included. This is shown configured in Step 3 for the **Default Purchase Request Workflow** > **Vendor Approval** step.



Note the following when configuring workflows for PR:

- **Workflow Hierarchies:** PR hierarchies are set up independently, including Authorized Approval and COA. These must be configured using **Invoice** > **Feature Hierarchies** before selection via the Policy tool.



- **Workflow Actions:** The actions of **Submit**, **Approve**, **Recall**, and **Send Back** are supported just as in Concur Invoice.

Budget Approval

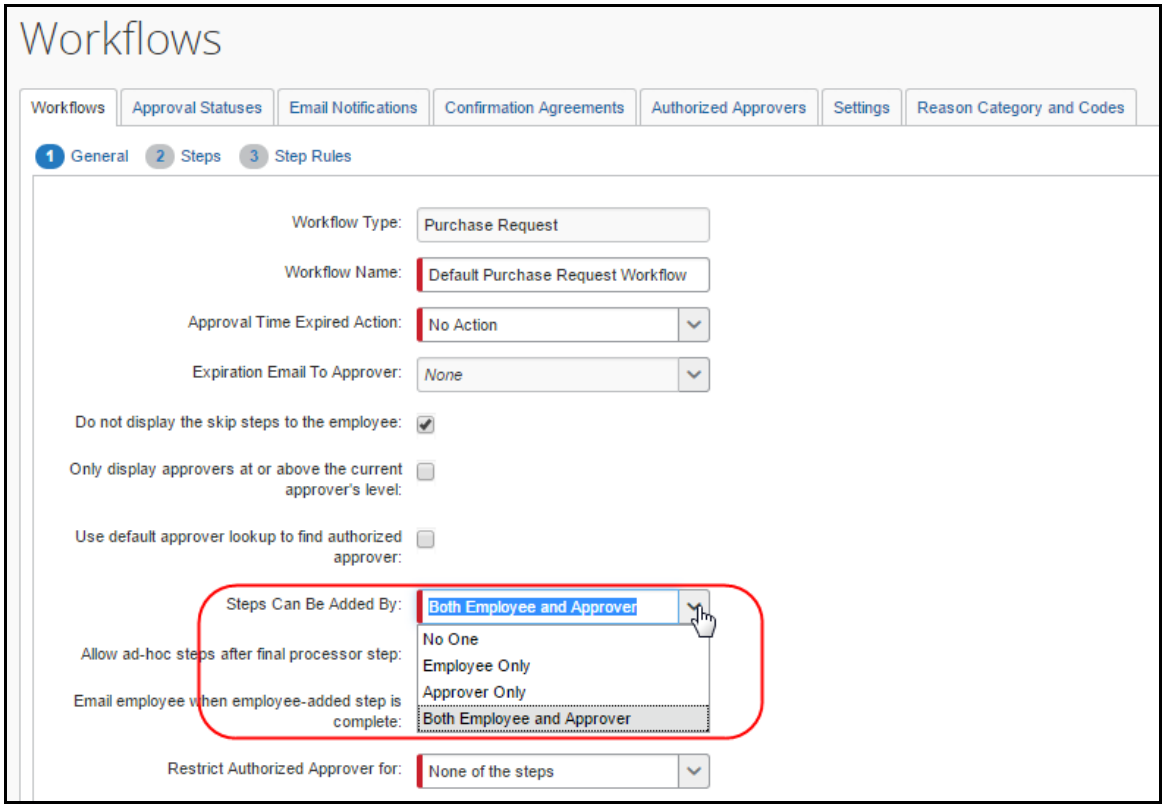
Clients who use the Budget feature can set up budget approval for both invoices and purchase requests. A budget workflow for purchase requests will include a budget approval step.

For more information about budget approval and budget workflows, refer to the *Shared: Budget Setup Guide*.

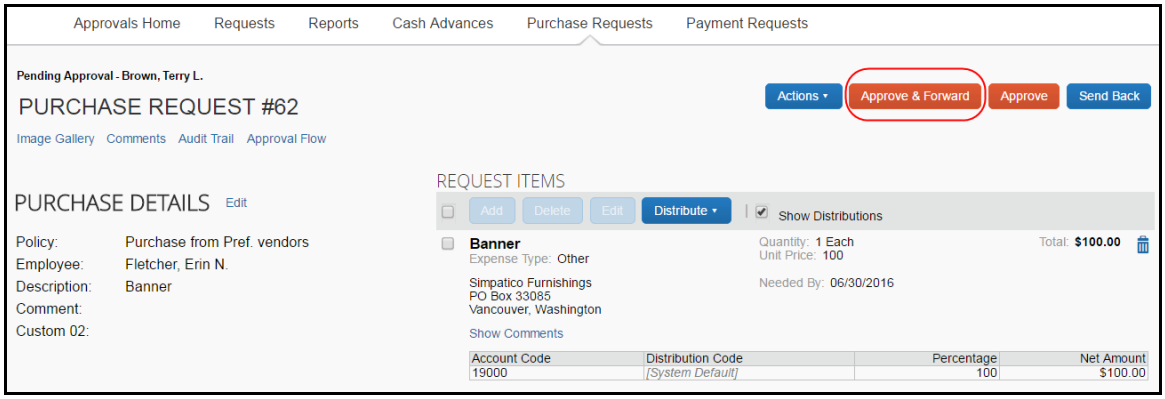
Allow the Approver to Approve and then Forward the Invoice

The ability for an approver to select an additional approver for an invoice is available in the Purchase Request functionality. This means any approver working with purchase requests can decide to approve the invoice, then designate an additional approver "on the fly" without having to access the workflow tool to make this change.

The setting appears in **Administration** > **Invoice** > **Workflows** by opening the PR workflow and selecting an approver under the **Steps Can Be Added By** list.



Once this option has been selected, the approver sees the button when they open the purchase request on the **Request Items** page.

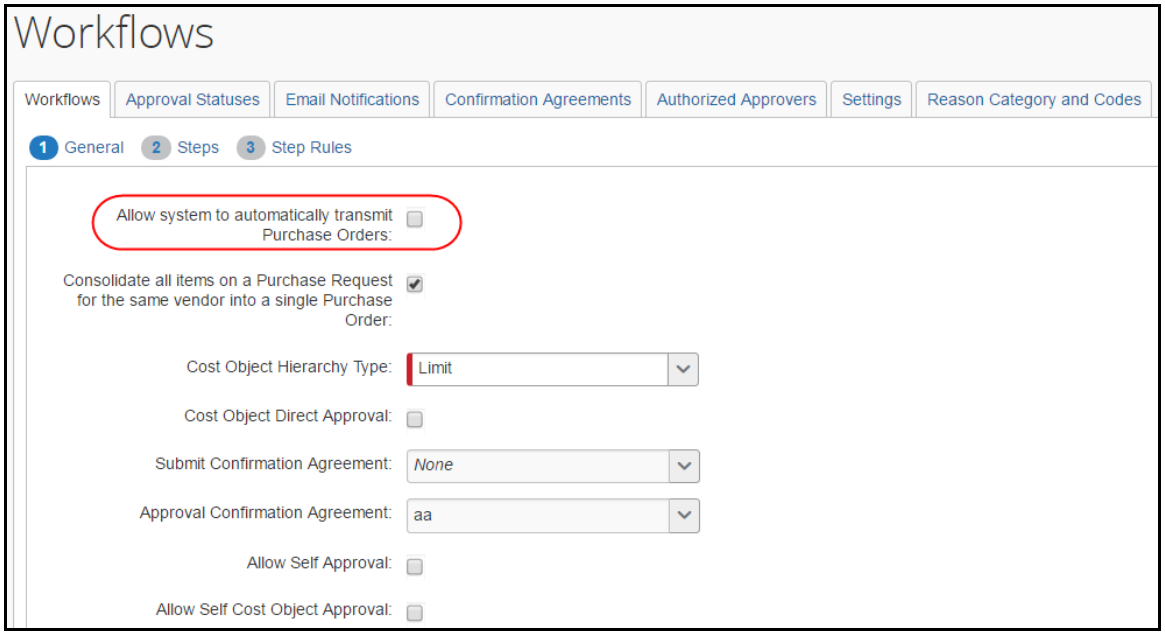


Allow Automatic Transmittal of Purchase Orders

The administrator may activate a feature whereby Concur Invoice will transmit the purchase orders from the approved purchase request directly to the supplier.

NOTE: If the purchase request contains incorrect data, such as an incorrect vendor email address, Invoice will not transmit the purchase request automatically, but instead it will require manual PO processing.

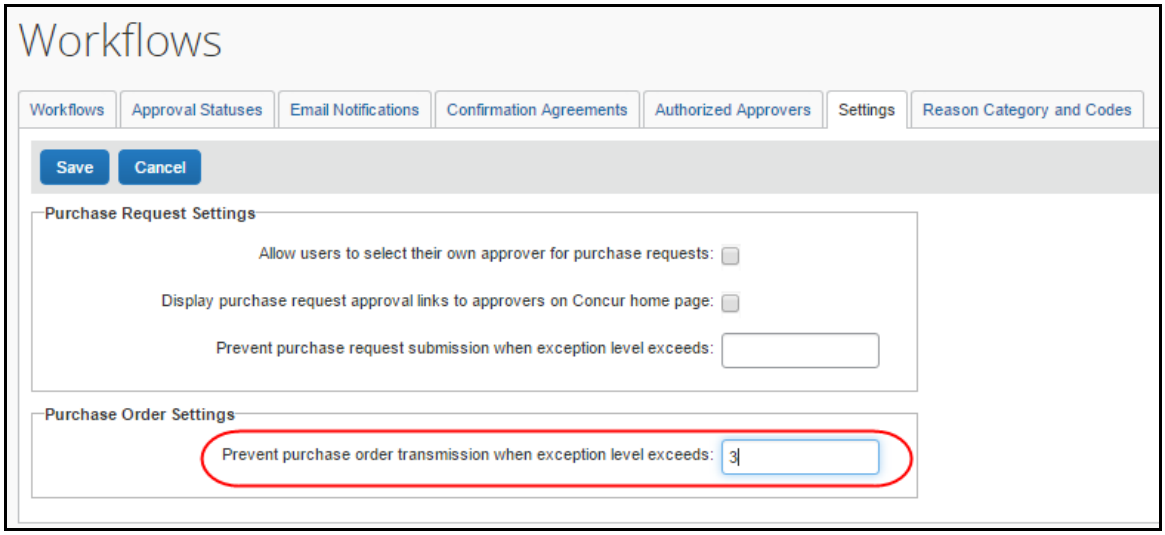
The setting appears in **Administration** > **Invoice** > **Workflows** > **Workflows** tab by opening a PR workflow and selecting the **Allow employee to automatically transmit Purchase Orders** option.



Prevent PO Transmittal When PO Exceeds Specified Exception Level

A setting in Workflows can be used to prevent PO transmission if the PO exceeds a specified exception level. The setting **Prevent purchase order transmission when exception level exceeds** prevents purchase order transmission when the configured exception level is exceeded and works just as the payment or purchase request settings of this type.

The setting appears in **Administration** > **Invoice** > **Workflows** > **Settings** tab and is shown in the following figure.



For more information, refer to the *Concur Invoice: Workflows – General Information Setup Guide*, the *Concur Invoice: Workflow – Cost Object Approval Setup Guide*, and the *Concur Invoice: Feature Hierarchies Setup Guide*.

Manage Items on Purchase Request Belonging to the Same Vendor

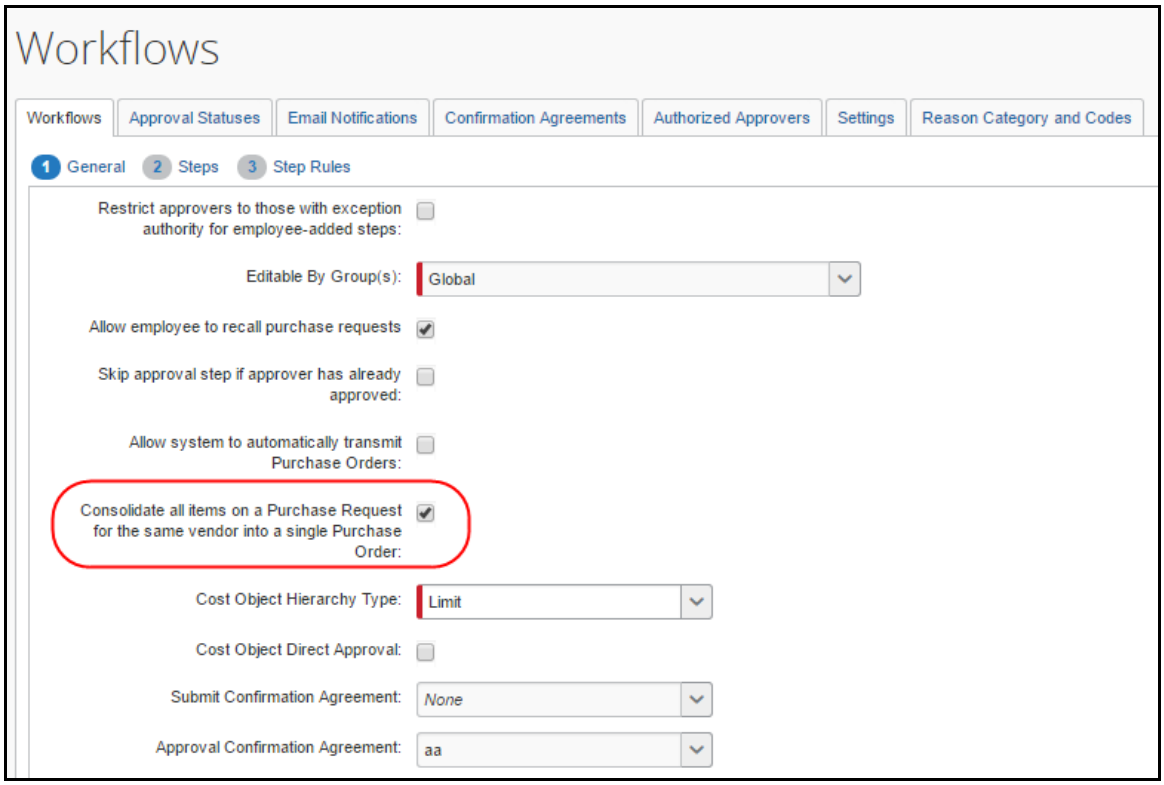
Admins can select whether they want to consolidate all items on a purchase request for the same vendor into a single purchase order or whether they want to split the items into several purchase orders, which they can do in the Workflows tool.

The **Consolidate all items on a Purchase Request for the same vendor into a single Purchase Order** workflow setting has the following two options:

- Selected/Enabled (default value), which means that the system will consolidate items on a purchase request that belong to the same vendor on a single purchase order
- Cleared/Disabled, which means that the system will *not* consolidate items on a purchase request that belong to the same vendor, but instead create one purchase order per item

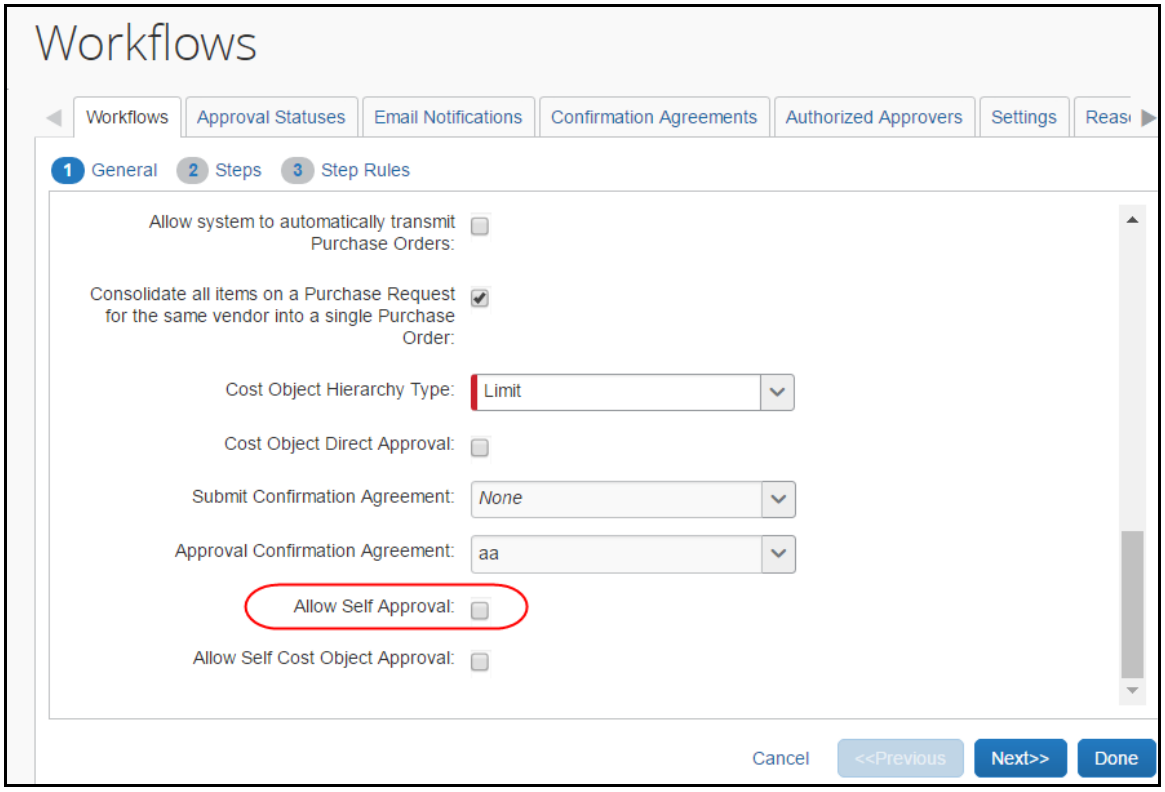
By clearing (disabling) this feature, processors will be able to change vendors on select purchase orders, which will be useful in scenarios where the PO Processor wants to change the requestor/assigned vendor to a preferred vendor.

The setting appears in **Administration** > **Invoice** > **Workflows** > **Workflow** tab by opening a PR workflow and selecting (enabling) the **Consolidate all items on a Purchase Request for the same vendor into a single Purchase Order** option.



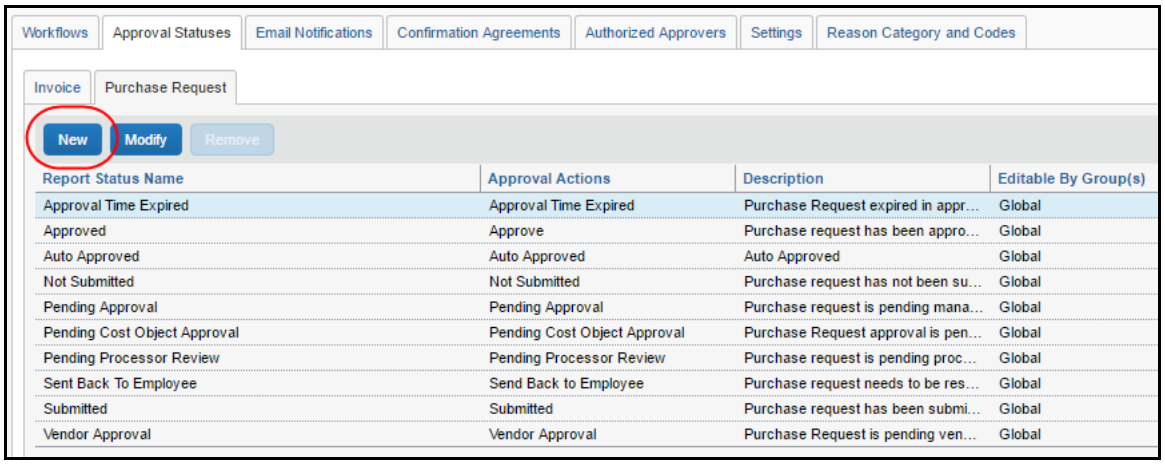
Self-Approval for Purchase Requests

Clients can self-approve purchase requests in a regular purchase request workflow. This means that a user can take advantage of a workflow step rule on the first approver step to "skip if limit approved" and apply an exception to flag the purchase request as having been self-approved.



Work With Purchase Requests Approvals

Admins can create custom approval statuses for purchase requests by clicking **Administration** > **Invoice** > **Workflows** > **Approval Statuses** > **Purchase Request**, and then clicking the **New** button.

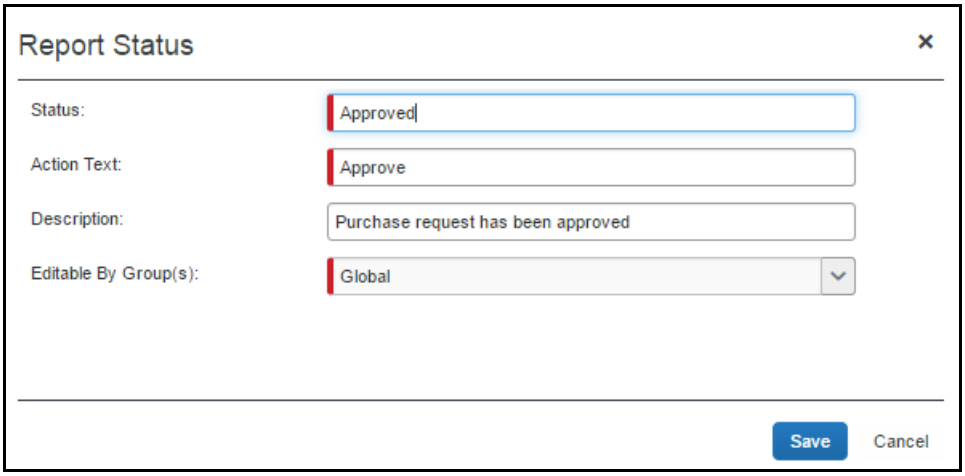


Once the admin clicks the **New** button in the **Purchase Request** tab, they will be able to enter new approval status information.

NOTE: Contact SAP Concur support if you need help configuring this feature.

To add an approval status for a purchase request

1. On the **Purchase Request** tab, click **New**. The **Report Status** window appears.



2. Complete the appropriate fields:

Field	Description
Status	Type a name for the new status.
Action Text	Type descriptive text to be used as the action text. This text becomes button text for the approver. When the approver clicks the button, the purchase request approval status changes to this approval status.
Description	Type the description text.
Editable By Group(s)	Select the group configuration(s) that can edit this workflow.

3. Click **Save**.

To edit an approval status for a purchase request

1. On the **Purchase Request** tab, either:
   - Select the desired status and then click **Modify**.
     – or –
   - Double-click the desired status.

   The **Edit Action** window appears.

2. Make any necessary changes.

   For information about these fields, refer to the *To add an approval status for a purchase request* procedure in this document.

3. Click **Save**.

To delete an approval status for a purchase request:

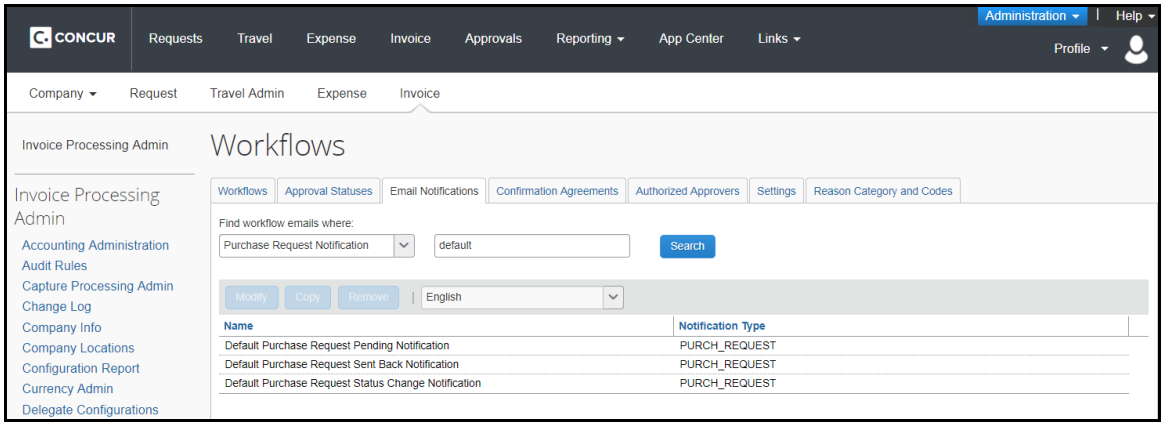
1. On the **Purchase Request** tab, select the desired status.

   NOTE: If a status is available for deletion, the **Remove** button becomes available.

2. Click **Remove**.

Email Notifications for Purchase Requests

Admins can customize pending approval, sent back to employee, and status change email notifications for purchase requests in the **Email Notifications** tab of the Workflows tool.

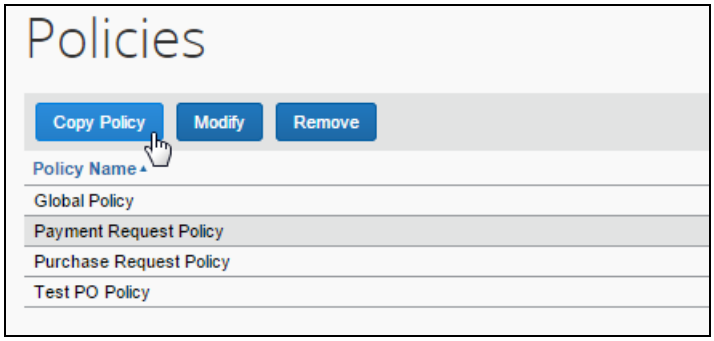


Once the admin has configured an email notification, they assign it to a workflow in the **Workflows** tab.

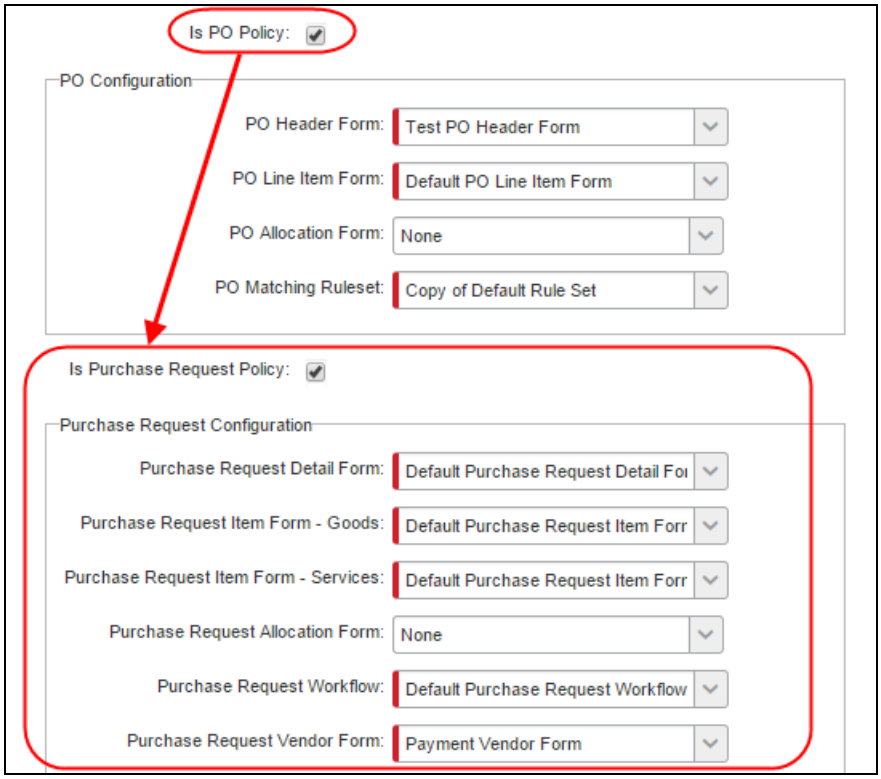
For more information, refer to the *Concur Invoice: Workflow – Email Notifications Setup Guide.*

Policy

It is critical that the existing default policy be copied and then configured for PR/PO as described below. Select the *Payment Request Policy*, then click **Copy Policy** and rename the copied policy, for example, *Purchase Request Policy*.

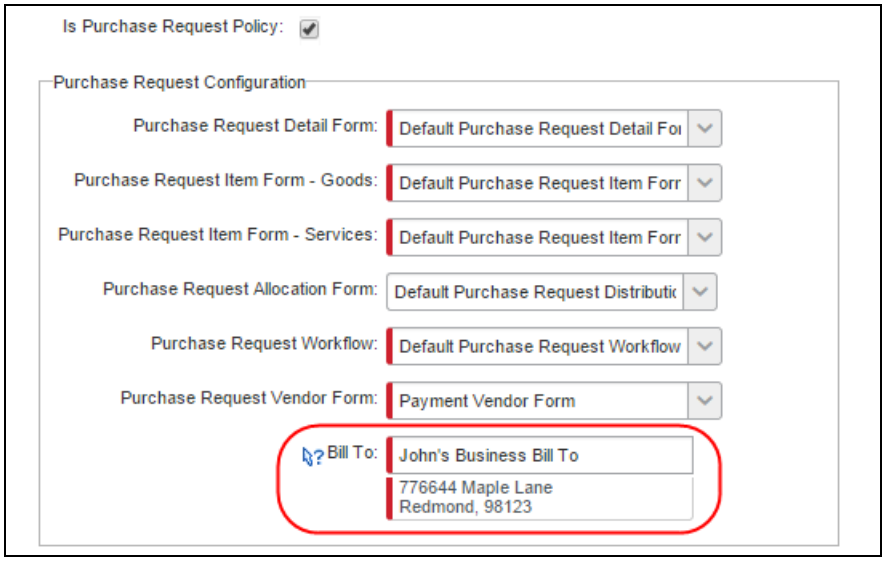


At least one purchase request-enabled policy must be active to create the purchase request type. Since the purchase request is associated to a purchase order, the *Is PO Policy* check box is first selected:



Now the **Is Purchase Request Policy** check box is exposed and, when selected, displays the **Purchase Request Configuration** options (forms and workflow selections) as shown in the figure above.

Your policy will require a billing address on setup. **Bill To** is a required field and must be filled out to complete the policy configuration.

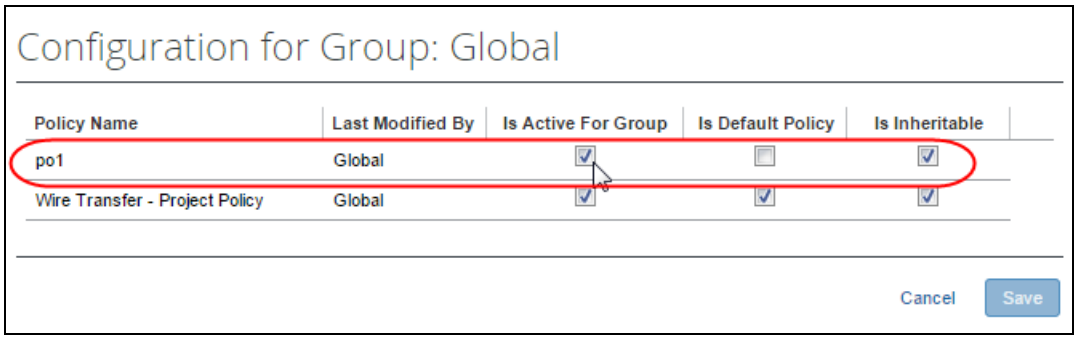


Refer to *Setting a Default Shipping and Billing Address* below to complete the billing address (as a minimum) so that policy configuration can be completed.

Assign the Policy to the Group

Be sure to assign the PR policy to an existing Group so that the employee can create a purchase request. To do this, click **Group Configurations**, select the policy, and then click **Modify** under **Policies** in the Group Configurations tool.

In the **Configuration for Group** window, select the check box in the **Is Active For Group** column. This associates the PR policy to the working Group, and allows users to create the invoice that uses the PR policy.



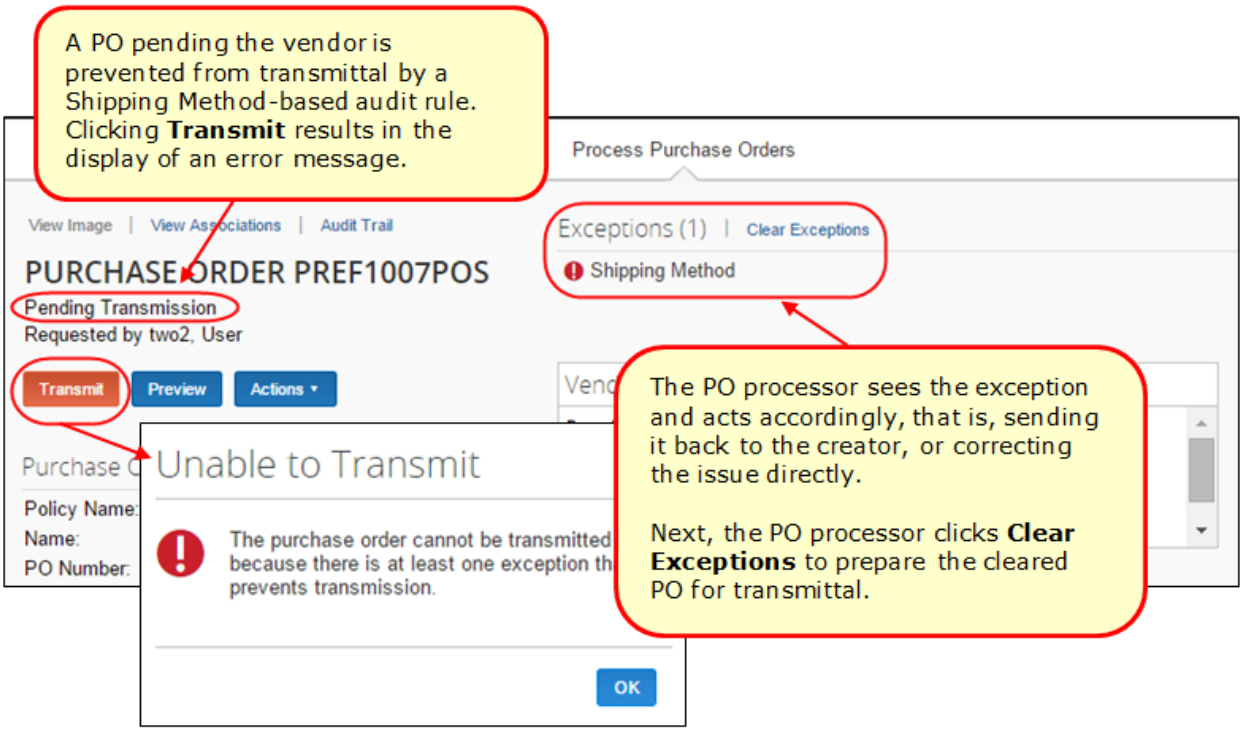
For more information, refer to *Concur Invoice: Policies Setup Guide*.

Audit Rules

The audit rules administrator can apply audit rules to purchase order (PO) events that, when fired, flag and prevent the PO from being saved, or prevent the PO from being transmitted to the vendor before review by the PO Processor role.

What the Purchase Order Processor Sees

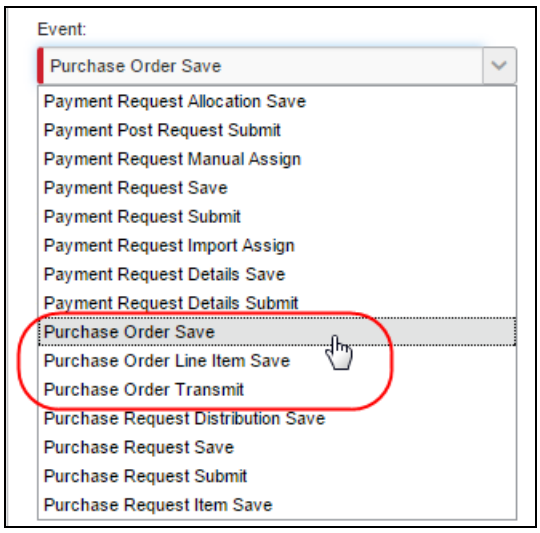
In use, the Purchase Order Processor role (only) views and clears PO exceptions. In the figure below, the selected shipping method for the PO has fired the non-preferred vendor rule, and the system will not allow the transmittal of the PO to the vendor.



To correct this, the PO Processor reviews the issue and then takes action.

USING AUDIT RULES WITH THE PURCHASE ORDER (PO)

PO rules prevent the save (header, line item) and transmission (transmit) events from executing and are designed to focus the PO Processor on high-profile issues. For example, flagging non-preferred vendors, ensuring maintenance fees are detailed when the *Software* expense type is used, or including an IT Director or Security VP when selected expense types require they be included in the audit trail.

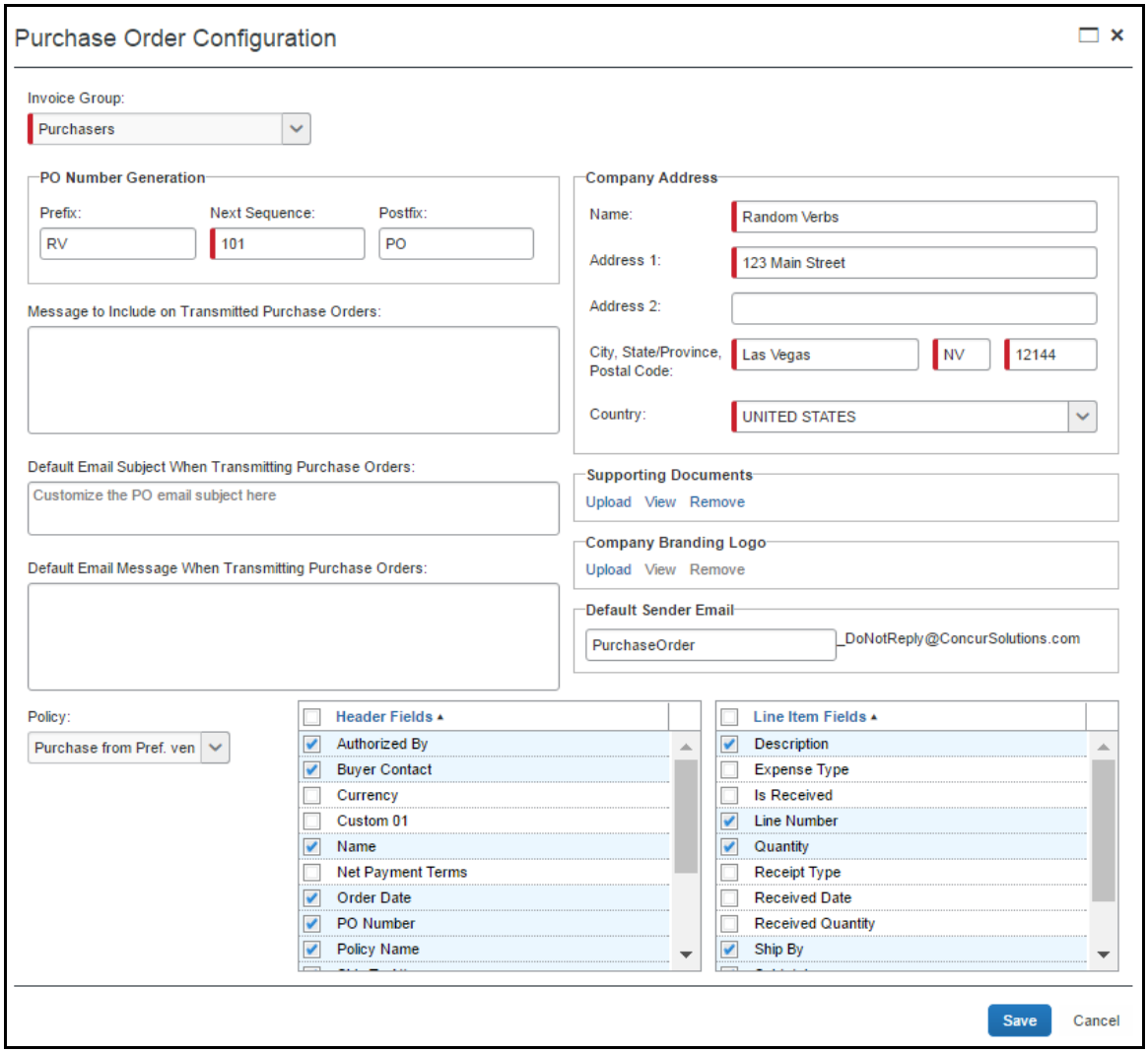


These new PO-related events are available in **Administration** > **Invoice** > **Audit Rules** when creating the audit rule.

📖 For more information, refer to the *Concur Invoice: Audit Rules Setup Guide*.

Use the Purchase Order Configuration Tool

The Purchase Order Configuration tool is available to the Invoice Configuration administrator for setting default information for purchase orders. To view this tool, click **Administration** > **Invoice** > **Purchase Order Configuration**.



Purchase Order Configuration is Group-Aware

Each PO configuration you create is based on the Group you select before creating the configuration. By associating a configuration with a Group, you can refine the company name, logo, email address, and other details to create a customized transmittal communication directed to a subsidiary of a parent company. For example, all PO Processors in the Global – Western Group could be associated with a PO configuration designed for the Los Angeles subsidiary of an international supplier.

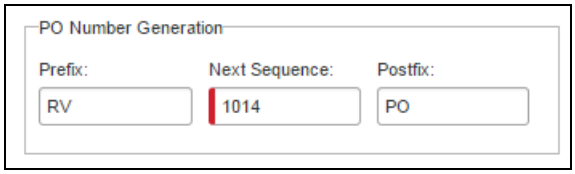
NOTE: Groups with no PO configuration assigned use the Global Group configuration by default.

Configure Purchase Orders

The following sections describe the settings and configurations available for purchase orders.

PO Number Generation

Enter the incremental PO number that will be assigned to each PO as they are generated on the approval of the PR.



What you enter in the **Next Sequence** field will be the *starting* number, which can be altered once the system is in use only by using a number "further along" the numbering sequence in use (for 1000, use 1001 as an example.) The character limit is 9 for the PO number.

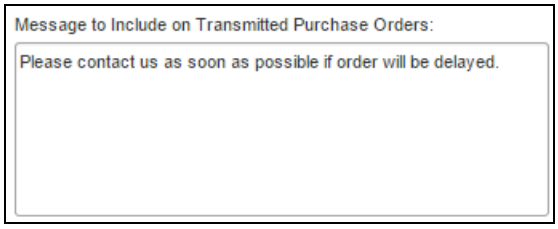
TIP: For testing, plan your sequential number assignment so that, once testing is completed, the starting number sequence for production is what you want.

Typically, the *Postfix* value is the initials of the purchasing agents.

NOTE: The prefix and postfix of the PO number do not distinguish between uppercase and lowercase.

Message to Include on Transmitted Purchase Orders

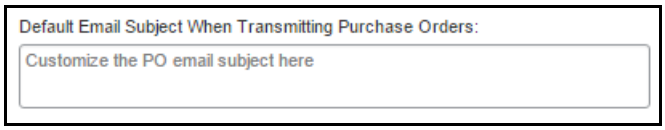
Enter instructions you want the vendor to note and follow.



NOTE: This field is limited to 3200 characters.

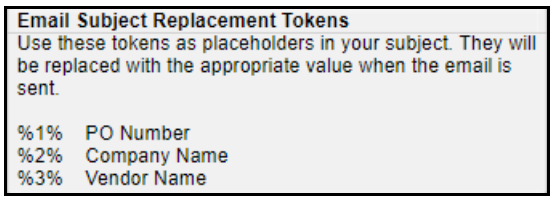
DEFAULT EMAIL SUBJECT WHEN TRANSMITTING PURCHASE ORDERS

The text entered in the **Default Email Subject When Transmitting Purchase Orders** field will appear in the subject field of the email sent to the vendor (the admin can customize this field).



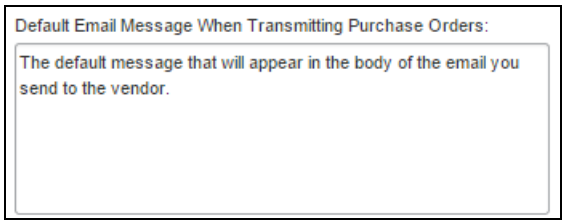
NOTE: This field is limited to 500 characters.

When the admin clicks the **Default Email Subject When Transmitting Purchase Orders** field, they will see a tool tip with information (tokens) about how to enter text in the field.



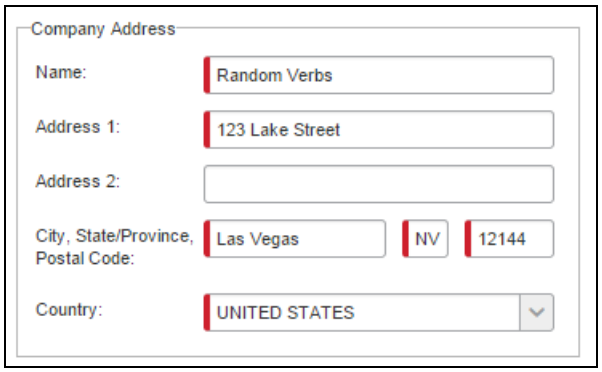
DEFAULT EMAIL MESSAGE WHEN TRANSMITTING PURCHASE ORDERS

The text entered in the **Default Email Message When Transmitting Purchase Orders** field will appear in the body of the email sent to the vendor (note that this can be changed as you review the PO prior to transmittal):



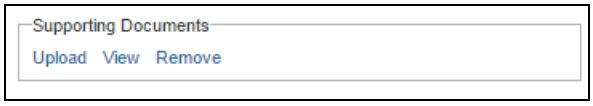
COMPANY ADDRESS

Enter your company address in the **Company Address** field.



SUPPORTING DOCUMENTS

In the **Supporting Document** section, you can upload documents that support the purchase order transmittal. These documents will be included when the supplier receives the PO. You can also view and remove documents.



COMPANY BRANDING LOGO

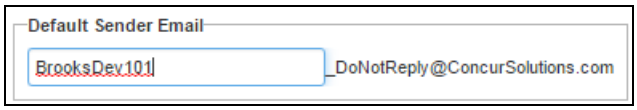
To upload the company logo into Invoice, so that vendors viewing purchase order PDFs will see the company logo, click **Upload** in the **Company Branding Logo** section.

The logo is group-aware in the same way as the purchase order configuration and clients can only update one company logo per invoice group. You can view or remove a logo by clicking **View** or **Remove** respectively.

NOTE: You can upload a .png, .jpg, or .gif file. The image should be 55 pixels high and no more than 200 pixels in length and 100 KB in size.

DEFAULT SENDER EMAIL

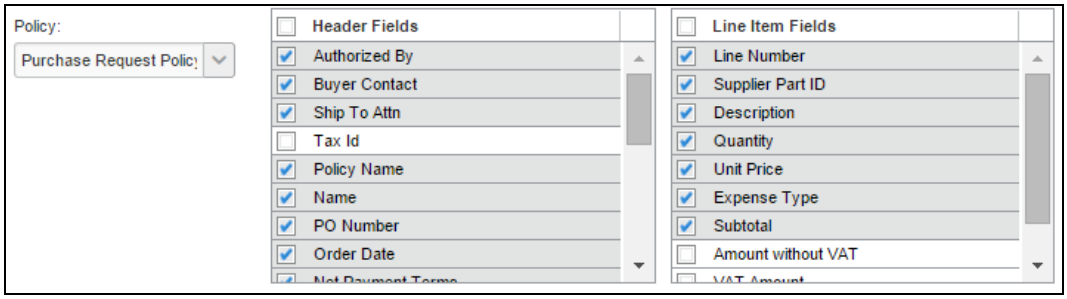
To enter a default sender address for purchase order transmission emails, type in a desired prefix in the **Default Sender Email** field. The default email address will be PurchaseOrder_DoNotReply@ConcurSolutions.com and admins will be able to change the prefix (set to "PurchaseOrder" by default) before the _DoNotReply part of the email address.



NOTE: If the prefix is left blank, the system will use the requestor's email address as the "From" address. SAP Concur does not recommended this since it increases the risk of the PO email being treated as spam by the supplier's email system.

FIELDS TO APPEAR ON PURCHASE ORDERS

The header and line time fields you select will appear on the purchase order. Ensure that you have selected the correct policy in the **Policy** list.



Ship To Without Requestor Name

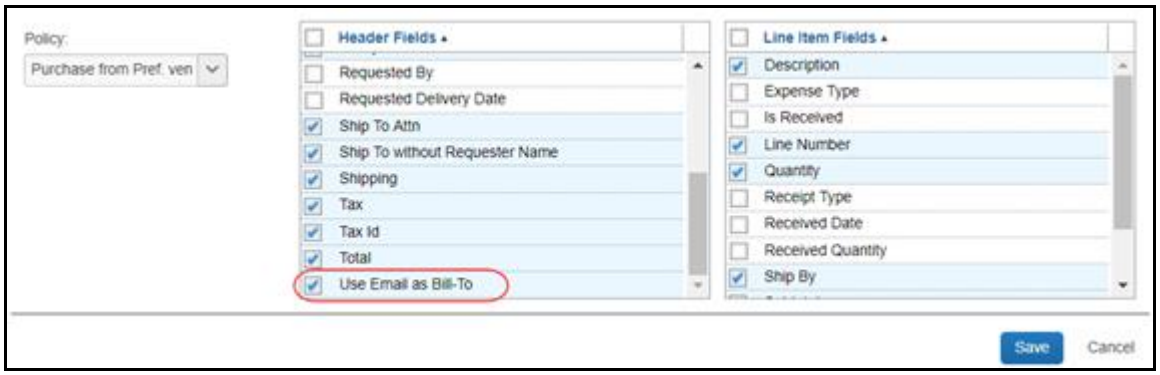
When a Purchase Requestor orders items for a client and these items are to be shipped directly to the client, the Purchase Requestor does not want to use their name on the ship-to address on the purchase order PDF. Instead, they can use the **Ship To without Requestor Name** header field, whereby the requestor's name is omitted.

Company Name Without Address

Admins can select the **Company Name without address** header field for users who create purchase orders across countries and want to remove the purchase requester's company address that is displayed on the transmitted purchase order.

Use Email as Bill-To

Provided the admin has added the **Use Email as Bill-To** field to the Purchase Order Header form in the Forms and Fields tool and entered an email address in the bill-to email address field in the Company Locations tool, admins can select the **Use Email as Bill-To** header field so that purchase order processors can specify that the PO invoice from a vendor be sent to the email address included in the bill-to that is used on their purchase orders.



Clients who use the capture service can use their capture email address as the bill-to address.

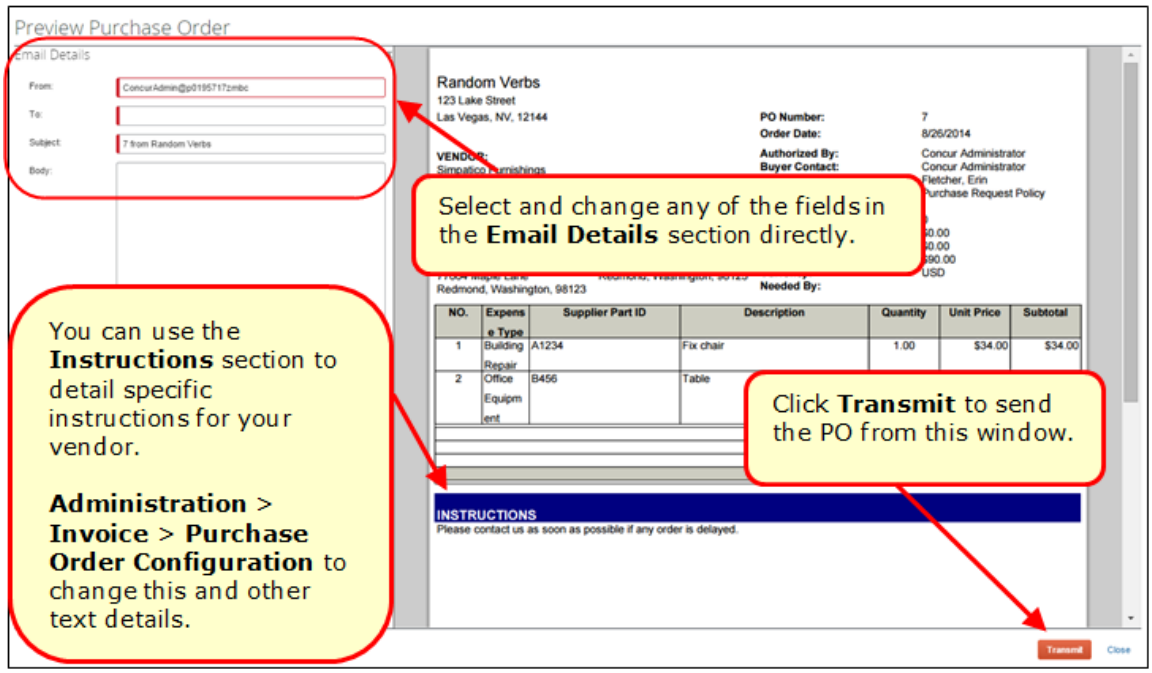
NOTE: If clients have not configured this feature, the purchase order will use the physical address as it does today.

The bill-to address on the PO PDF that the vendor receives is an email address which notifies the vendor to send the PO to the specified email address.

What the Purchase Order Processor Sees

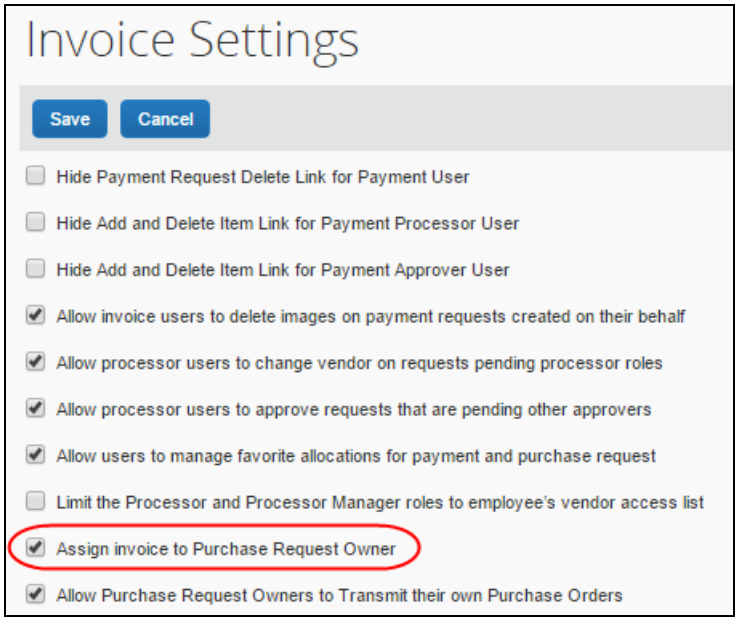
The default header and line item fields appear for review when the PO processor opens the PO and clicks **Preview**.

This opens the PO in PDF format, where the processor can correct selected areas (in the **Email Details** section) and review those configured using the PR tool.



Auto-Assign PO-Based Invoices to Original Purchase Request Owner

Often the AP User's task of manually assigning the invoices from POs to Purchase Requests is time-consuming and can result in errors. An option in Invoice Settings, **Assign invoice to Purchase Request Owner**, lets Concur Invoice automatically assign the resulting invoices to the original PR requestor.



With the setting selected (enabled), if a Concur Invoice created or externally created PO-based invoice is associated with a PO number, the system will try to find the purchase request associated with that PO, and then assign all resulting invoices to the owner of the purchase request.

NOTE: Concur Invoice now lets users who manually assign invoices to see who the purchase request owner is even though the **Assign invoice to Purchase Request Owner** option is cleared (disabled).

For more information, refer to the *Concur Invoice: Invoice Settings Setup Guide*.

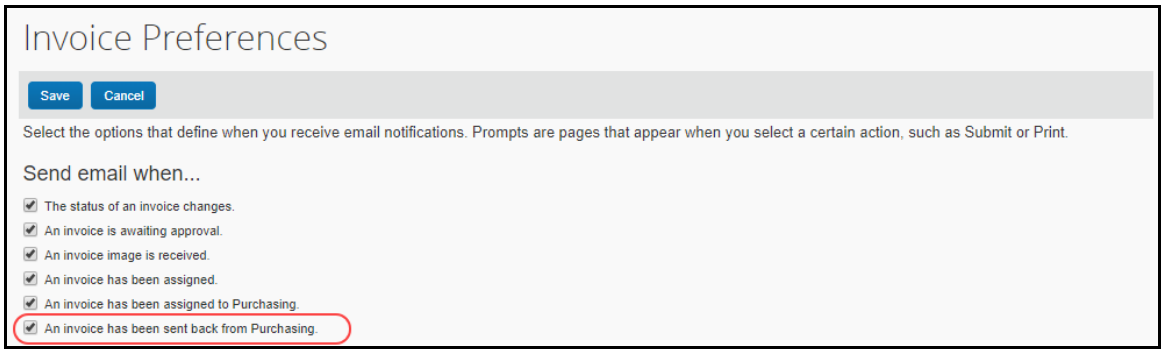
Other Configuration Options

The following section briefly describes other areas that may need to be configured for the PR feature.

Setting the Purchase Email Notification Preferences

The user can self-assign the email notifications they want to receive when certain actions, such as a status change or approval, are performed on their purchase requests. The user selects **Profile** > **Profile Settings** > **Invoice Preferences** to open these preferences for view. For all selections in the **Send email when…** section, each email notification option is selected by default.

As an example, a user would select the **An invoice has been sent back from Purchasing** to ensure they are alerted whenever their purchase request is returned to them by their approver or processor.



Allow Purchase Request Owners to Transmit Their Own Purchase Orders

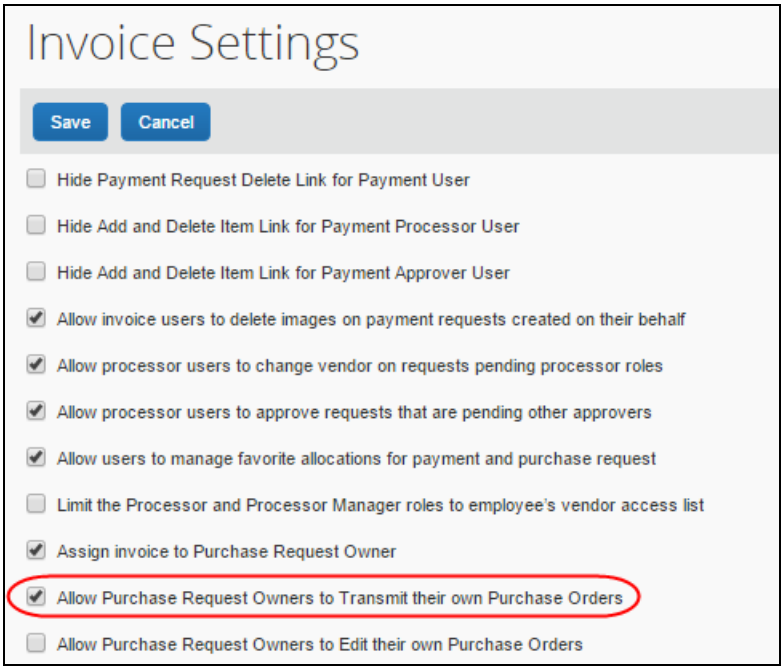
You may allow a Purchase Request Owner to transmit their own purchase orders. This is useful when a company does not have a procurement function and would like the Purchase Request Owner to also perform tasks that a PO Processor would normally do.

After you have activated this feature in Invoice Settings, the Purchase Request Owner will be able to see the **Purchase Order** page to transmit his/her purchase orders.

To allow purchase request owners to transmit their own purchase orders

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

3. Select (enable) the **Allow Purchase Request Owners to Transmit their own Purchase Orders** option.



4. Click **Save**.

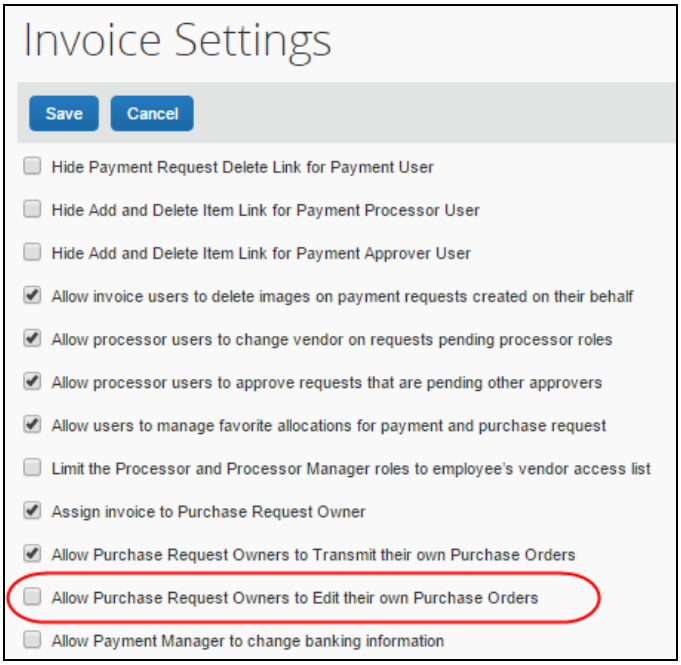
Allow Purchase Request Owners to Edit Their Own Purchase Orders

You may allow a Purchase Request Owner to edit their own purchase orders. This provides more options for purchase request owners to manage their purchase orders.

To allow purchase request owners to edit their own purchase orders

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

3. Select (enable) the **Allow Purchase Request Owners to Edit their own Purchase Orders** option.



4. Click **Save**.

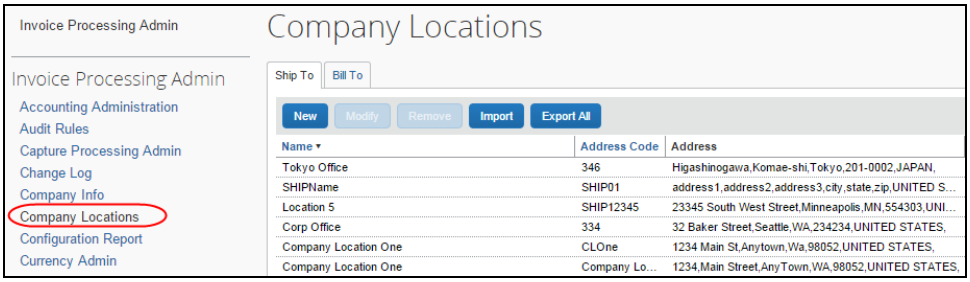
Set a Default Shipping and Billing Address

You can decide to create shipping and billing addresses within Purchase Request, and then assign a default shipping (only) address for a user or have them set their own address.

SET THE SHIPPING ADDRESS

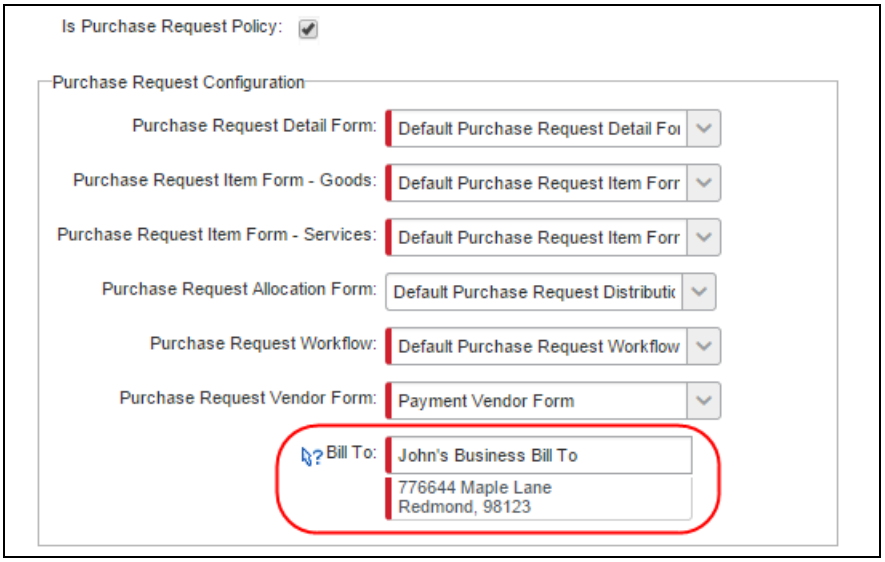
One or more shipping addresses are created by the Invoice Configuration administrator or Invoice Configuration administrator (Restricted) roles, and a single address optionally assigned to each Purchase Request user (that is, a choice of *None* is also supported).

- **Step 1: Add Multiple Addresses Using the Company Locations Tool:** Click **Administration** > **Invoice**, and then click **Company Locations** to open the **Company Locations** page.



Add one or more shipping addresses by clicking **Ship To** and then **New**. The addresses you add here are available for selection by a user (Profile) or administrator (User Administration), or by assignment via the ONP employee import. If you want to import or export multiple ship-to addresses, you may do so by using the Import or Export All functionality.

TIP: Be sure to type the *Name* value (for example, *Triton*, and not the *Address*) whenever you are specifying the value for any Bill To or Ship To entry. This is the only value that will return your search criteria. Alternatively, you can click the down arrow to return a list of all system addresses from which to choose.



For more information, refer to the *Concur Invoice: Company Locations User Guide*.

- **Step 2a: Assign a Shipping Address Using Employee Import:** The Import/Extract Administrator uses the Employee Import's **Default Shipping Address** field in the 360-level record set to set the shipping address.

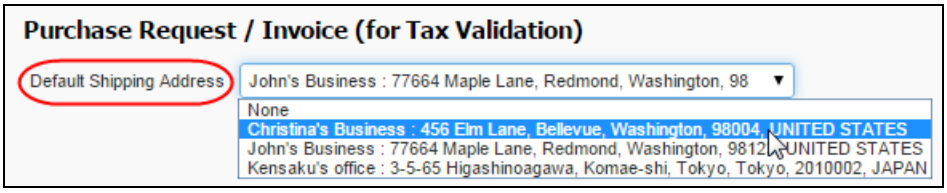
	new payment request			
28	Default Shipping Address	32 characters	N	This field applies to Purchase Requests. This is the shipping location code provided by the client that uniquely identifies the default shipping address associated with this user, and that will be utilized when creating a Purchase Request.
29 -	Future Use 14 - 20		N	Reserved for future use

- This field uses the unique location code provided by the client that identifies the default shipping address associated with the imported user, and that will be utilized when creating a purchase request.

For more information, refer to the *Shared: Employee Import Specification*.

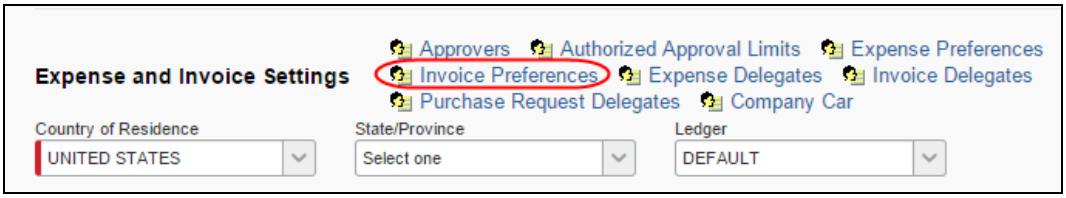
- **Step 2b: PR User—Assign a Shipping Address Using Profile:**

  The user can self-assign the available shipping address via Profile by clicking **Invoice Preferences** > **Purchase Request** > **Default Shipping Address**.



  Note the availability of addresses created using the Company Locations tool. Make a selection (or retain the default of *None*) and then click **Save**.

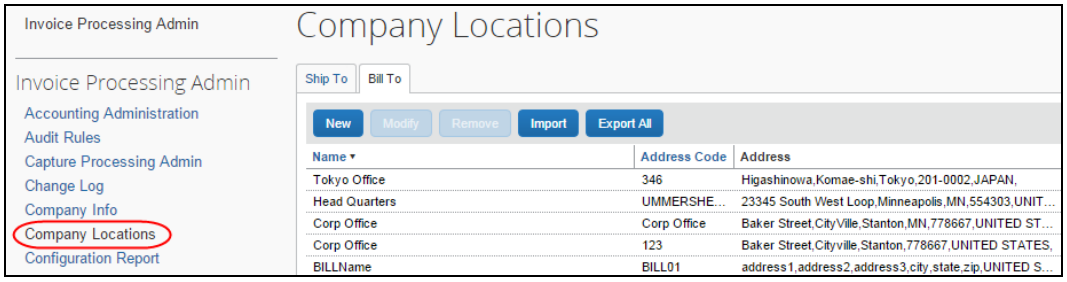
- **Step 2c: User Admin—Assign a Shipping Address Using User Administration:**
  The administrator can assign the available shipping address on behalf of a user by accessing that user in **Administration** > **User Administration**. With the user loaded in the form, scroll to **Expense and Invoice Settings**.



  Click **Invoice Preferences** to open a window identical to the Purchase Request figure above, and then select one of the available addresses.

SET THE BILLING ADDRESS

The billing address is configured in **Administration** > **Invoice** > **Company Locations**. You may add as many billing addresses as required. If you want to import or export multiple bill-to addresses, you may do so by using the Import or Export All functionality.



For more information, refer to the *Concur Invoice: Company Locations User Guide*.

Use the Employee Import Overnight Job

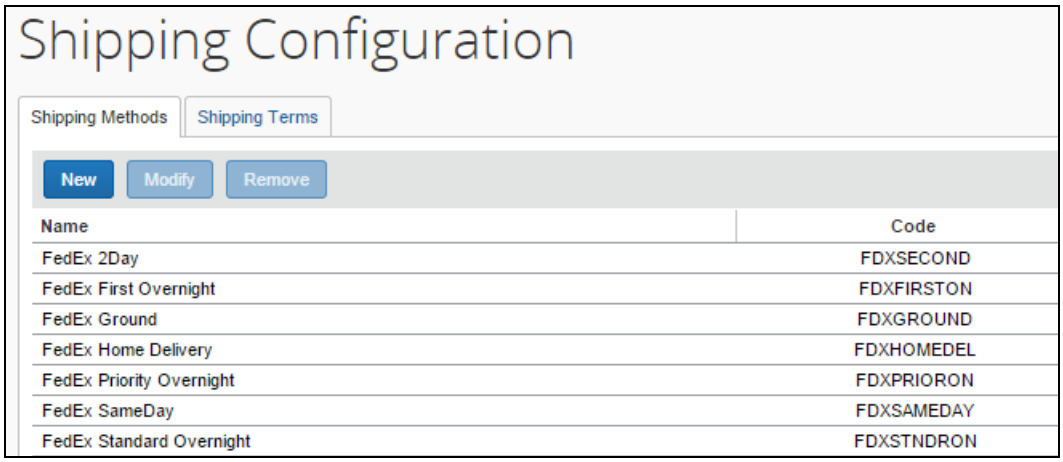
The overnight employee import job (only) may be used to import the following Purchase Request data:

- **Roles and Default Approver:** Use a combination of the 300- and 360-level fields to add the PR roles, and to assign the default approver for a PR user
- **Add/Delete Authorized Approver:** Use the 720-level fields to add, and the 750-level to delete an authorized approver for Purchase Requests, being mindful to use the "PUR" identifier in the Approval Type field
- **Add/Delete COA Approver:** Use the 710-level fields to add, and the 760-level to delete a COA approver for Purchase Requests, being mindful to use the "PUR" identifier in the Approval Type field
- **Shipping Address:** Use the 360-level *Default Shipping Address* field to set the shipping address (other options using the UI are described above)

Shipping Configuration and Shipping Terms

The Shipping Configuration tool lets the Invoice Configuration administrator or Invoice Configuration administrator (Restricted) create shipping types and shipping terms that incorporate a name and an internal code as provided by the client. The **Shipping Method** field may be exposed on any of the PR forms (it is not on any form by default) in order to select a shipping method when creating the purchase request.

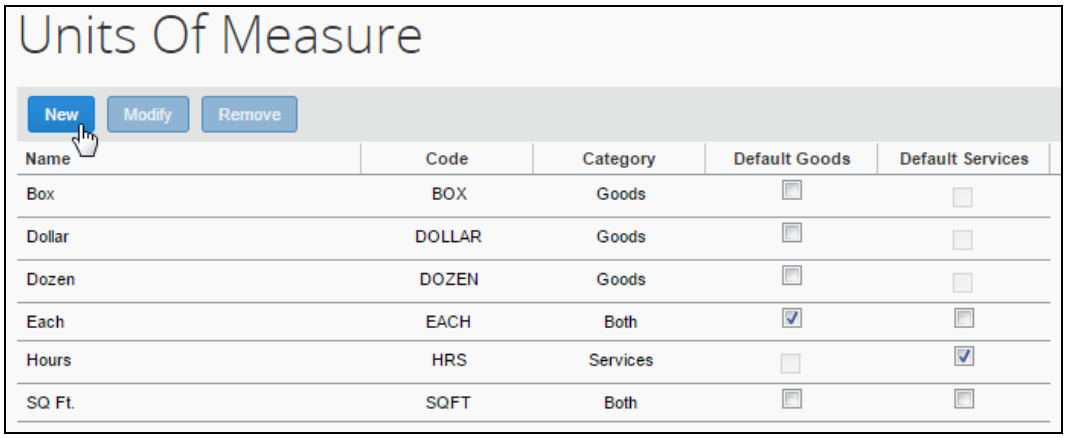
Access this tool by clicking **Administration** > **Invoice** > **Shipping Configuration**, clicking a tab as required.



Units of Measure

The **Units of Measure** page lets the Invoice Configuration Administrator and Invoice Configuration Administrator (Restricted) add, edit, and soft-delete a measurable identifier that can be related to a spend type (good or service, or both). This enables them to add a unit that is meaningful to their business type or their approach to identifying spend.

Click **Administration** > **Invoice** > **Units Of Measure** to open the page.

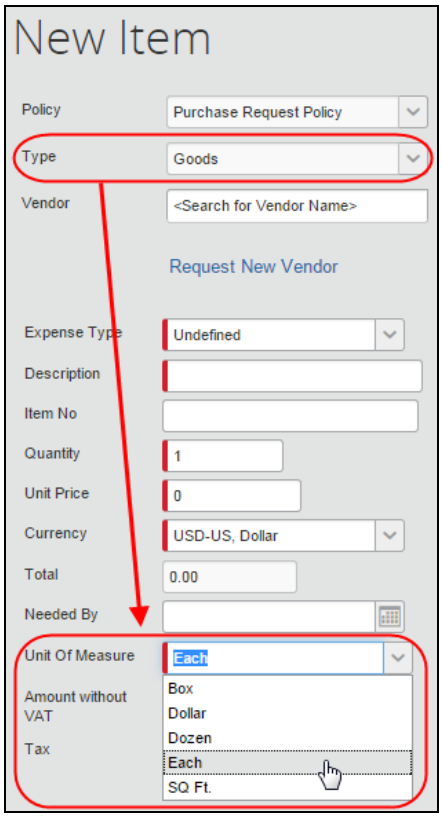


Name	Code	Category	Default Goods	Default Services
Box	BOX	Goods	☐	
Dollar	DOLLAR	Goods	☐	
Dozen	DOZEN	Goods	☐	
Each	EACH	Both	☑	☐
Hours	HRS	Services		☑
SQ Ft.	SQFT	Both	☐	☐

A set of default units is included. Units are associated with a spend type (Goods, Services, or Both). The administrator can specify a unit type that will always appear as the default choice by checking the box in the **Default Goods** or **Default Services** column.

How Units of Measure Appear to the User Creating an Item

Units of measure appear when a PR item is added and vary depending on the spend type. For example, in the figure below, the Goods type is selected, and the associated Goods units of measure are available. Note the default selection for Goods is the one specified as the default in Units of Measure above (that is, Each):



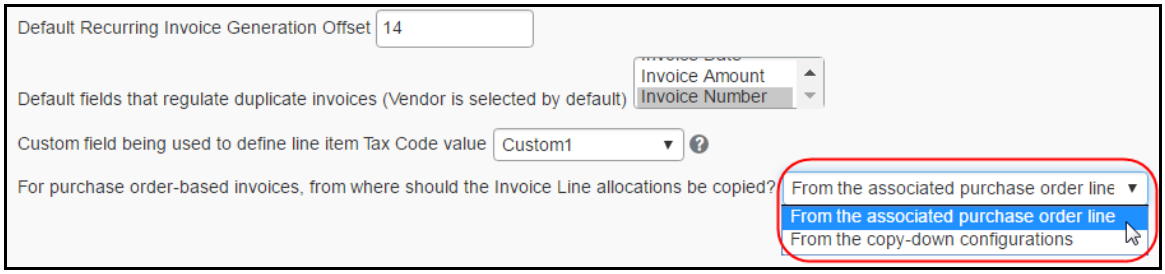
Note the following when using this feature:

- The **Unit of Measure** field may be added to any of the Item forms (Purchase Request, PO, and Payment Request)
- The field may be included in PO matching rules and audit rules
- The field may be included in a PO or Payment Request import

Copy Down of PO Allocation Lines

The Invoice Settings tool enables clients to configure copydown PO allocation lines in the two following ways:

- From the associated purchase order line
- From the copydown configurations



If clients select the **From the associated purchase order line** option, PO allocations lines will automatically be copied down from the PO line to the associated invoice line. Concur Invoice will also copy down the corresponding allocation fields on the lines from the PO.

Example

If the PO line has three allocation lines, then associated invoice lines will also have three allocation lines. The custom field values on the PO Allocation lines will be defaulted to the custom field values on the invoice allocation lines as follows:

PO Alloc.Line1.Custom1, Invoice Alloc.Line1.Custom1

PO Alloc.Line1.Custom2, Invoice Alloc.Line1.Custom2

NOTE: Unassociated lines will behave the same way as before, that is, they will continue to have blank allocation lines.

If the invoice has more allocation fields than the PO, the additional fields will not be defaulted to any value, unless there is a copydown configuration to copy down from a specific source, such as the invoice header or line item.

If the PO line has only default allocation lines, then Invoice will copy these down to invoice as well.

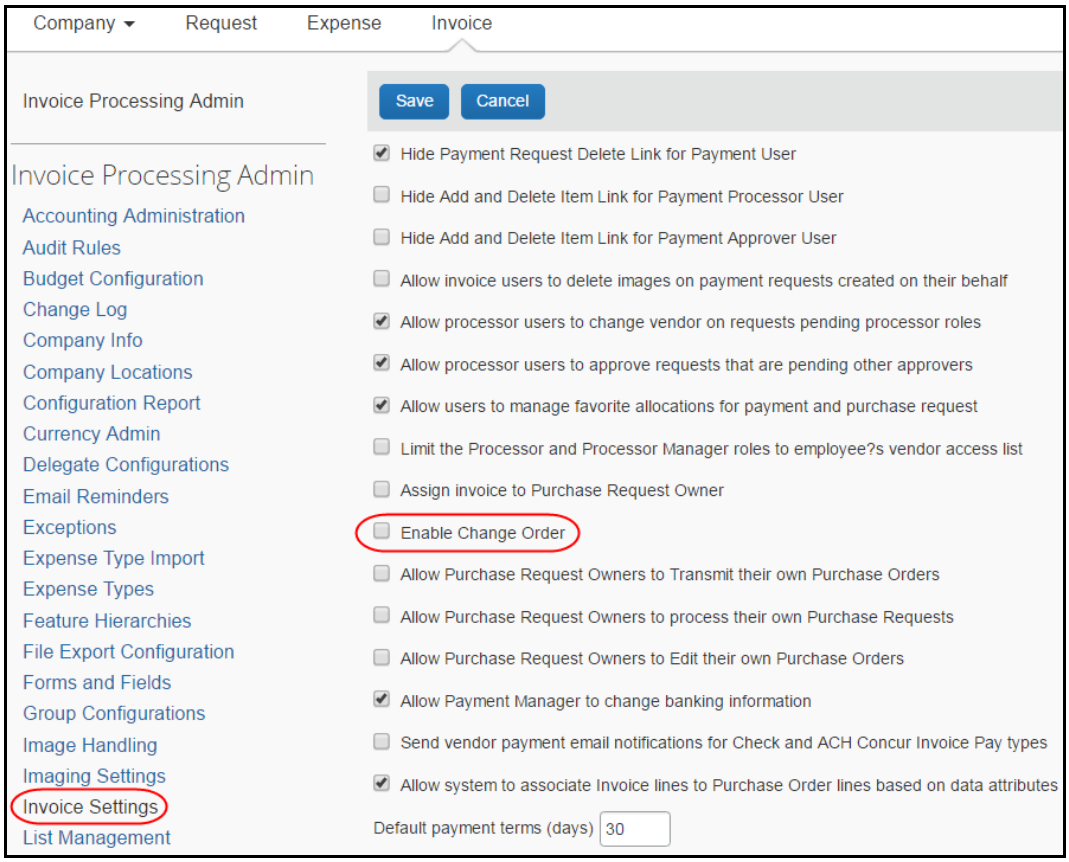
When a user changes the PO number on an invoice and the invoice lines are associated with the new PO lines, the new PO allocations should replace any existing allocations.

If clients select the **From the copy-down configurations** option, the copydown configuration of allocation fields will apply to both PO-based and non-PO based invoices.

Enable the PO Change Order feature

Users who have the purchase request and purchase order functionality activated, can now create PO change orders from transmitted purchase orders to add funds to line items and then resend the purchase request through the same workflow. This is useful when a client needs more goods or services and do not want to create a new purchase order but can instead add more funds to an existing purchase order.

To activate this feature, admin needs to use the Invoice Settings tool by selecting (enabling) the **Enable Change Order** check box. The default setting is cleared (disabled). To access the option, the admin must click **Administration** > **Invoice** > **Invoice Settings** (left menu).



For more information about using this feature, refer to the *Concur Invoice: Purchase Request and Purchase Order User Guide*.