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Purpose

The purpose of this guide is to educate the Authorized Support Contact (ASC) on how to best utilize Concur Small Business Edition Customer Support. It provides instructions on ASC management, requesting and contacting support as well as case management via the Concur Support Portal (CSP). This guide also reviews priority levels, resolution timeframes, the escalation process and resources to track validated Priority 1 (P1) Incidents.

Authorized Support Contact Management

During the 45 Day Free Trial Phase, Concur will initially assign at least one company-designated ASC access to the CSP and phone support. Thereafter, additional ASCs for a maximum total of five will be managed by the company’s Concur Administrators.

Small Business Edition

ASC Permission via User Permissions

This grants access to the CSP. Concur Administrators manage the ASC access by following the steps below:

1. Within Concur, navigate to Administration > Setup > Expense > Users.
2. In the Search box, enter the user’s data and click the magnifying glass icon.
3. To open, double click on the user’s name.
4. Scroll to the User Permissions section.
5. Select the Can Administer permission
6. Click Save.

Concur Support Portal Access

The Concur Support Portal (CSP) is a service and information center focused on providing customer self-service tools, timely and informative communications as well as opportunities to interact among peers.

From the CSP, ASCs can contact Small Business Edition Customer Support for assistance, search our Knowledge Base, access resources and training materials, participate in the Community and submit service enhancement ideas through Solution Suggestions.

For ASCs, the Contact Support link will appear within Concur on the Help link for convenient access to the Concur Support Portal via Single Sign-On (SSO). To activate this access, click Help > Contact Support.

My Profile Options

Service Alert Emails

Service Alert email preferences can be changed within the profile as well. To receive emails for validated P1 incidents that impact your Concur services, check the Opt In to receive Service Alert emails box. Service Alert emails are sent from Sunday at 5 PM PT to Friday at 5 PM PT. If you choose to not Opt In, utilize Concur Open for 24/7 real time information on validated P1 incidents.
Requesting Support

We ask ASCs to refrain from contacting Small Business Edition Customer Support while they are still within the 45 Day Free Trial Phase. When cases are created within this period, the ASCs are referred back to FreeTrials@concur.com. When cases are created after the 45 Day Free Trial Phase, they are routed to the Small Business Edition Customer Support queue and assigned to the Small Business Edition Customer Support Specialists.

To report an issue, ask a question or make a request, the preferred method is to create and submit a case from the CSP. Regardless of the complexity, this provides the most efficient results, allowing detailed information and relevant documents to be included.

It is recommended that ASCs review the Knowledge Base in the CSP for answers prior to contacting Small Business Edition Customer Support for assistance. If experiencing an outage or performance issue outside of the maintenance window, please check your Inbox if opted in to receive Service Alert emails.

Maintenance Window

If users experience an outage or performance issue during the standard Saturday maintenance window, it is not necessary to contact Small Business Edition Customer Support.

North America Data Center:  5 PM to 9 PM PT
EMEA Data Center:  11 PM to 3 AM CET
APAC Data Center:  11 PM to 3 AM SGT

Contacting Support

When calling Small Business Edition Customer Support, customers will be directly routed to an automated voice mailbox, wherein they will be asked to leave the following information:

- A good call back number
- Company Name
- Program Admin/Caller’s name and email address
- Short description of the issue

A call back can be expected from the Small Business Edition Customer Support within 72 hours after your voicemail has been sent.

Priority and Customer Response Levels

Cases are assigned priority levels to indicate the level of impact, which reflects the maximum length of time for initial acknowledgement and ongoing communication. For Small Business Edition Customer Support to resolve an issue, the steps to reproduce the issue must be provided. Where possible, copy and paste information from the Concur product into cases for complicated items such as report names to ensure accuracy.

The table below defines the Customer Response Levels for each priority:

<table>
<thead>
<tr>
<th>Priority Level</th>
<th>Definition of Priority</th>
<th>Customer Response Levels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority 1 (P1) Very High</td>
<td>An incident should be categorized with the priority “very high” if the problem has very serious consequences for normal business processes or IT processes related to core business processes. Urgent work cannot be performed.</td>
<td>A Customer Support Representative will reply to contact within 1 hour upon receipt of a Priority 1 case informing the case owner that the case has been received. Ongoing communication: unless otherwise communicated by Support, once every hour. Resolution Target: provide for issues either a (I) resolution, or (II) workaround or (III) action plan within 4 hours.</td>
</tr>
</tbody>
</table>
Note: For resolutions dependent upon 3rd party vendors, the ongoing communication levels are not applicable.

**Escalation Process**

When a case is created, it is assigned to a Customer Support team dedicated to help a specific group of customers. A priority level is also assigned to each case based on Concur’s internal guidelines.

Small Business Edition Customer Support may need to escalate the case to other departments within Concur. In these instances, the assigned representative remains responsible for providing case updates until resolution.

If Concur is unable to resolve a P1 case in accordance with the respective targeted resolution timeframe set forth above, Concur will continue to work diligently until the case is resolved.

In the unlikely event a response is not received from Small Business Edition Customer Support within the Customer Response Levels, please ask for an update in the Case Comments section. If the case needs to be escalated, click the Escalate button and an escalation notice will be sent to the assigned team. A red up arrow next to the Case Number denotes escalated cases.

**Priority 1 Incidents**

Concur Open and Service Alert emails are the ASC’s resources to view and track validated P1 incidents. When Concur is aware of an outage or performance issue, it will be reflected within these resources; therefore, it is not necessary to contact Customer Support.

**Concur Open**

Concur Open, our service status dashboard, brings 24/7 visibility to the availability of Concur services to ASCs and end users. The service status can be viewed by day for the most recent 20 days.
The legend at the bottom of the Concur Open service status dashboard provides information about what each icon means. Hover your mouse over the icons to view more details:

![Legend Image]

In the event of a validated P1 outage or performance issue, a series of messages will provide information as we work to resolve the incident, the resolution notification, and root cause analysis once Operations completes their investigation. The chart below outlines the types of messages found by clicking on an icon associated with a service not operating normally.

<table>
<thead>
<tr>
<th>Message Type</th>
<th>Message Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Impact Assessment</td>
<td>Preliminary information regarding the potential user impact</td>
</tr>
<tr>
<td>Confirmed Impact</td>
<td>Confirms user impact</td>
</tr>
<tr>
<td>Update</td>
<td>Updates provided at least every two hours</td>
</tr>
<tr>
<td>Resolved</td>
<td>Notification of resolution</td>
</tr>
<tr>
<td>Root Cause Analysis</td>
<td>Information from Operations' investigation into the root cause of the issue and actions implemented for earlier detection and prevention of future occurrences</td>
</tr>
</tbody>
</table>

**Service Alert Emails**

Service Alerts are emails that include the affected service(s), user impact and resolution notification for a validated P1 incident followed by an Incident Root Cause Analysis email once Operations completes their investigation.

ASCs can automatically receive Service Alert emails by updating their Service Alert email preference to opt in on the My Profile page in the Concur Support Portal by following these steps from their Concur product:

1. Click on Help > Contact Support.
2. Click on My Profile.
3. Check the **Opt In to receive Service Alert** emails box and click Save.
To opt out of receiving Service Alerts for future incidents, uncheck the Opt In to receive Service Alert emails box and click Save.

**Note:** Whether you choose to opt in or opt out, this will only apply to future P1 incidents.

ASCs opted in will receive Service Alert emails from concursupport-servicealerts@concur.com from Sunday at 5 PM PT to Friday at 5 PM PT. The email subject will contain the type of Alert and the OPI number (Operations Incident). In instances when we are unable to determine specific customers affected, the Service Alert email will reference a “subset of clients” which means your service may or may not be impacted.

There are two types of Alerts that apply to an incident:

1. **Alert:** States the initial issue.
2. **Alert Resolved:** Advises the issue has been resolved.

**Note:** Rely on Concur Open (open.concur.com) for updates or incidents identified and resolved before the Service Alert email could be sent.

### Root Cause Analysis

Our Operations team works diligently to provide the Root Cause Analysis (RCA) for each Service Incident (OPI) in a timely manner. The RCA identifies the cause of the OPI and any detection or prevention measures implemented. The investigation to complete the RCA depends upon the complexity of the OPI. Once completed, the Incident Report is updated and the Incident Root Cause Analysis is emailed to the Authorized Support Contacts (ASC) who received the Service Alert(s).

Once an ASC receives the Initial Alert, they will continue to receive all Service Alert emails pertaining to that incident. Once Operations finishes their investigation, they will also be sent the Incident Root Cause Analysis email even if they are no longer an ASC or have chosen to opt out of receiving Service Alert emails.

### Case Management

#### Creating a Case

1. From Concur, hover over the Help link and click on Contact Support to access the CSP.
2. From the CSP home page, click Create a Case.
3. Enter details in the Case Description field including steps to reproduce an issue, unique identifiers, date and time information, impacted users, or other details pertinent to the case.
4. Enter a brief description of the case in the Subject field.
   - If relevant articles are available based on subject, articles will display in the Suggested Articles section. To review, click the article link and a new window will open.
     - If the article answers the question, click Yes – Take me to the Knowledge Base or navigate to another tab on the CSP.
     - Within the Knowledge Base, some articles can be viewed in additional languages. To check if the article is available in another language, click the Language dropdown and select the desired language.
     - If your question has not been answered, click No – I want to log a Case or navigate to another tab on the CSP.
   - If no relevant articles display, click Continue Creating a Case.
5. Select the most appropriate Topic and Case Type from the drop down lists.
6. Select the most appropriate Urgency from the drop down list.
   - **Options are:** 1 – Very High (Core service is completely down); 2 – High (Business processes seriously disrupted); 3 – Medium (Business processes effected); 4 – Low (Little or no effect on business processes)
7. Select the appropriate Case Region.
8. Enter the Site/URL/Acct. # if applicable.
9. If the preference is to have a Small Business Edition Customer Support Specialist call before working the case, select the **Call Me** box. Please ensure the correct phone number is in the profile.

10. Enter additional email addresses in the **CC Email** field to include others on updates from Small Business Edition Customer Support.

11. Click **Submit & Add Attachments** to attach any documentation that can assist Small Business Edition Customer Support in case resolution. Follow the 3 steps to attach a file. Each file is limited to 25 MB.

12. Click **Submit** and a case number will be assigned.

**Note:** Do not attach files with sensitive data such as complete credit card or social security numbers.

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**Viewing a Case**

1. From Concur, hover over the **Help** link and click on **Contact Support** to access the CSP.

2. From the CSP home page, click on the **View Cases** box.

3. From the **View** drop down list, choose from:
   - All Open Admin Cases
   - All Closed Admin Cases
   - My Cases
   - Recently Viewed Cases

4. To sort cases by ascending or descending order, click on a specific column heading.

5. To view one case at a time, click the **Case Number** or **Subject** link.

6. To update a case, click **Add Comment** in the **Case Comments** section.

7. To search the Knowledge Base, click **Find Articles**.

8. To add an attachment, click **Attach File** and follow the 3 steps. Each file is limited to 25 MB.

9. To close a case, click **Close Case**, select **Close** under **Status** and click **Submit**.

10. To print, click the **Printable View** link.

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**Pending Customer Statuses**

**Pending Client Comment**

If Small Business Edition Customer Support requires additional information to resolve a case, the status will change to Pending Client Comment. The Case Comments section will specify what is needed to proceed. No progress can be made until the case is updated with the requested information.

**Pending Client Confirmation**

Pending Client Confirmation is the final status for all cases. When customers agree to the actions taken to resolve the case, they can confirm and the case will close. Should customers choose not to respond, the case will automatically close in 10 days. However, the case can be re-opened within 7 days of closure. After that time, a new case must be created.

**Closed Case Survey**

A Closed Case Survey is sent via email after a case has been closed. This survey is designed to give ASCs an opportunity to provide feedback regarding their level of satisfaction with the knowledge and communication from Small Business Edition Customer Support and the timeliness of the resolution, which will allow us to prioritize our improvement efforts.

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**Customer Support Documentation**

**How to Navigate the Concur Support Portal**

For additional information on the Concur Support Portal, search the Knowledge Base for the **How to Navigate the Concur Support Portal for Small Business Edition**.