Concur Invoice: Purchase Request and Purchase Order

Setup Guide for Standard Edition

Last Revised: December 10, 2021

Applies to these SAP Concur solutions:

- ☐ Concur Expense
  - ☐ Professional/Premium edition
  - ☐ Standard edition

- ☐ Concur Travel
  - ☐ Professional/Premium edition
  - ☐ Standard edition

- ☒ Concur Invoice
  - ☐ Professional/Premium edition
  - ☒ Standard edition

- ☐ Concur Request
  - ☐ Professional/Premium edition
  - ☐ Standard edition

Table of Contents

Revision History

Date	Notes/Comments/Changes
August 30, 2022	Minor edits; cover date not updated
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
December 10, 2021	Updated instructions for **Product Settings** page
March 4, 2021	Updated the copyright year; no other changes; cover date not updated
July 29, 2020	Updated various pages to reflect the redesign of the Users page.
July 6, 2020	Added information about the processor only approval routing option.
May 27, 2020	Updated text throughout to reflect UI name change from "Manage Custom Fields" to "Custom Fields"
April 22, 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 30.
January 8, 2020	Updated the copyright; no other changes; cover date not updated
December 17, 2019	Removed references to the deprecated ‘pause when “Acting As” proxy’ feature.
June 8, 2019	Updated text and images throughout to reflect UI name change from "Cost Tracking" to "Custom Fields".
May 9, 2019	Updated images to omit Cost Tracking tile in Product Settings.
April 13, 2019	Added information about budget approval.
March 21, 2019	Updated "payment request" to "invoice". Updated "Concur" to "SAP Concur". Updated images.
January 29, 2019	Updated the copyright; no other changes; cover date not updated
September 26, 2018	Removed reference to fact sheet; no other content changes.
April 14, 2018	Updated the Approval Routing screenshot to show new configurable timeout field.
April 11, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
February 15, 2018	Updated “Show Advanced Settings” text.
November 4, 2017	Updated with the following information: • New **Product Settings** page, which replaces the Setup Wizard • Image showing the vendor token • Bill-to and ship-to addresses automatically filled in when company address details are entered
March 18, 2017	Updated with menu option name change to access Setup Wizard.
December 13, 2016	Changed copyright and cover; no other content changes.
December 5, 2016	Updated the guide content to new corporate style; no content changes.

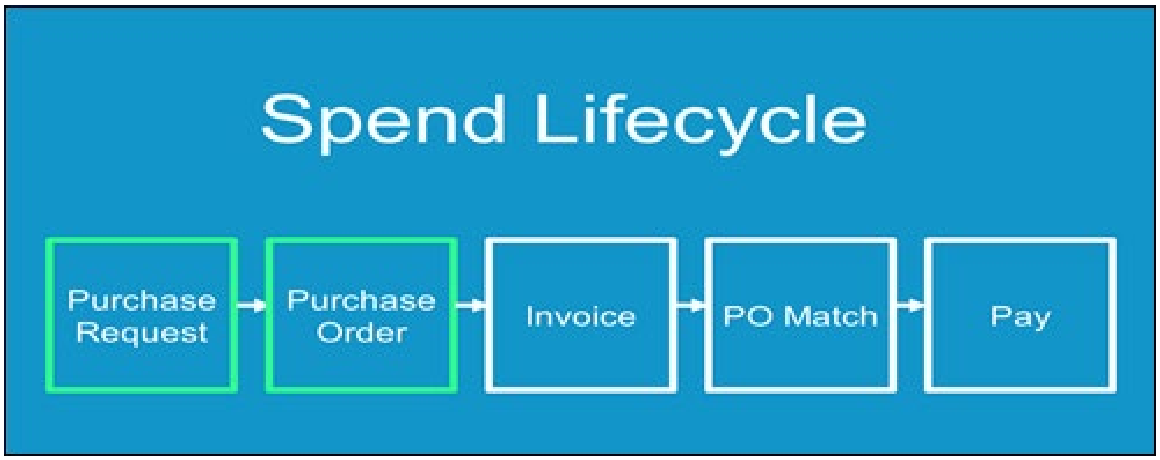
Date	Notes/Comments/Changes
November 4, 2016	Removed company locations procedures and referred to the *Invoice: Company Locations Setup Guide*.
October 14, 2016	Added information about the admin being able to customize the email subject.
September 9, 2016	Added information about **VAT ID** field in bill-to address.
August 12, 2016	Moved information about assigning PO-based invoices to the original purchase request owner to the *Invoice: Approval Routing Setup Guide for Concur Standard Edition* based on product design change.
July 29, 2016	Added information about the assigning PO-based invoice to the original purchase request owner.
July 8, 2016	Added information about updated default sender address for purchase order transmission emails.
May 13, 2016	Added information about PO-based invoices automatically assigned to purchase request owners.
March 18, 2016	Updated graphics to reflect change of **State/Province** field into a list.
February 19, 2016	Added information about importing and exporting ship-to and bill-to addresses.
November 20, 2015	Updated graphics to reflect newly styled step numbers.
July 10, 2015	Added information about PO-based invoices being automatically assigned to purchase request owner.
April 10, 2015	Added information about the ability to upload a company logo in PO Configuration.
March 4, 2015	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: Overview

The Purchase Requests and Purchase Orders (PR & PO) feature allows clients to achieve internal spend authorization using Purchase Requests. Concur Invoice turns these requests 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 Concur 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 resides 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 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 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 Concur Invoice PO & PR solution, which for current users of Concur Invoice (or Concur 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 and 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

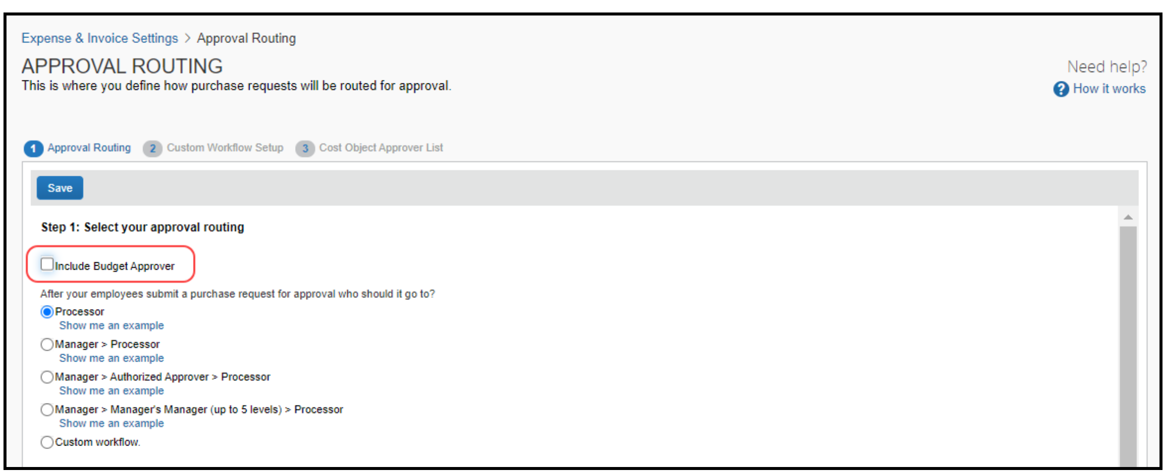
Purchase Request Workflow

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

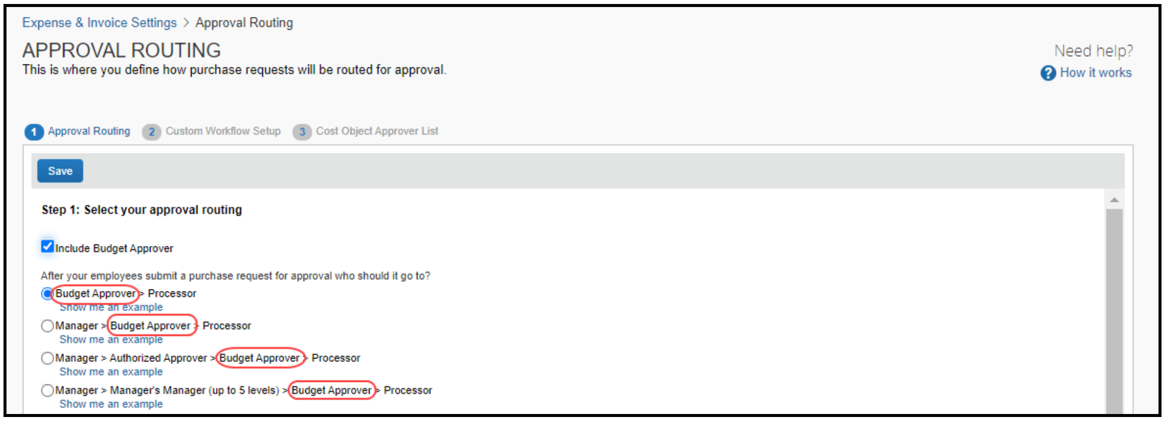
Budget Approval

Clients who use the Budget feature can set up budget approval for both invoices and purchase requests.

To include budget approval for purchase requests, the admin must select the **Include Budget Approver** check box.



The system adds a budget approver step to the approval routing options.



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

Before You Begin

Before you configure the Purchase Request feature, ensure that SAP Concur has enabled the feature in the SAP Concur internal-only tool.

Section 2: What the Admin Can Do

This section describes what the client admin can do.

For information about how to configure the Purchase Request feature, refer to the *Configure Purchase Requests* section in this guide.

Configure Purchase Request and Purchase Order Settings

Once SAP Concur has enabled the Purchase Request and Purchase Order feature, the client administrator will see several pages in Product Settings that they need to configure. These pages consist of the following:

- Approval Routing
- Compliance Controls
- PO Configuration
- Units Of Measure

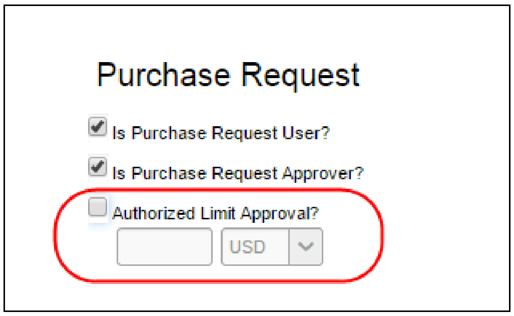
In addition, to ensure that the supplier knows where to ship the goods or services and to whom to bill, the client administrator must add a ship-to and a bill-to address on the **Company Locations** page of Product Settings.

The admin will also see additional options in the **User Information** section on the **Users** page. These options are:

- Purchase Request Approver
- Is Purchasing Admin?
- Is Purchase Request User?
- Is Purchase Request Approver?

The client administer must assign relevant role to the user depending on if the user creates, approves, or processes purchase requests and purchase orders.

If the admin has selected the Is Purchase Request Approver role for a user, they will be able to select an authorized limit approval for that user.



NOTE: The client admin must select the **Custom workflow** option on the **Approval Routing** page of Product Settings to see this setting.

In the **User Information** section on the **Users** page, client admins will also see new fields in the on-demand import file.

Act As a Proxy for a Purchase Request User

A user can be assigned a proxy role that allows them to act on behalf of any other user granted the Purchase Request User role. This feature is identical to its implementation in Concur Invoice, and is designed specifically to work *within* Purchase Request, without changing the Purchase Request User role and access right when they exit Purchase Request and begin work within Concur Invoice.

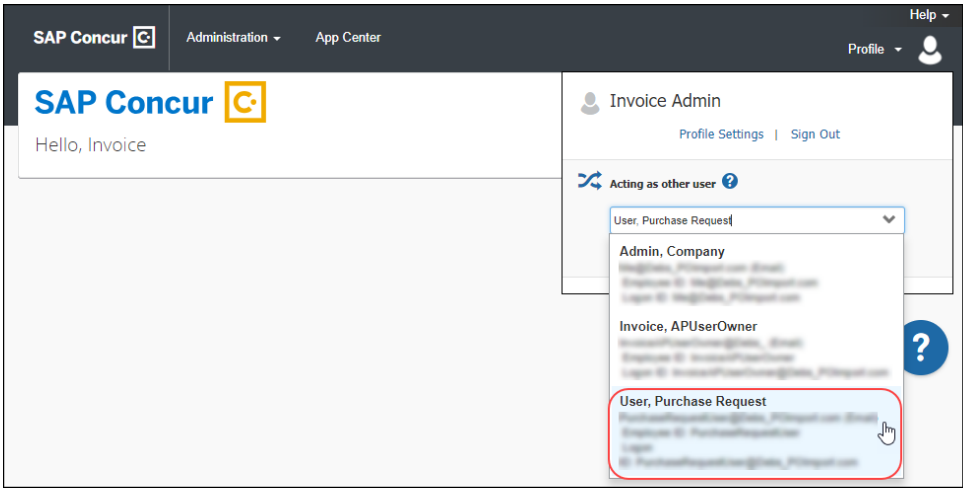
How It Works

The proxy feature works when the following role relationship is in effect:

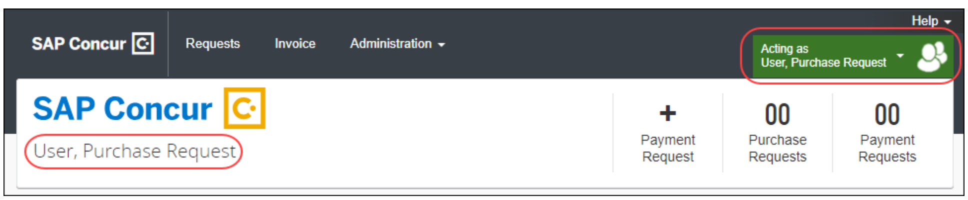
- The Invoice Admin role is assigned to the user who will act as a proxy for users with the Purchase Request User role.
- The Purchase Request User role is assigned to the users that the Invoice Admin will act as a proxy for.

With this relationship in place, the Invoice Admin sees a list of users in the **Acting as other user** list in the **Profile** menu and can select and act as a proxy for any user with the Purchase Request User role.

In the following example, the Invoice Admin can choose to act as the Purchase Request User.

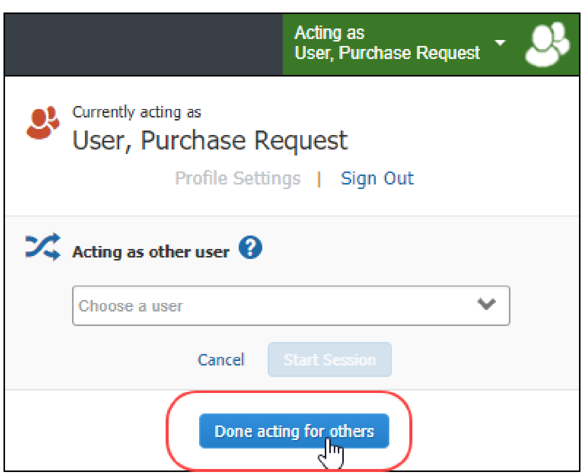


While the Invoice Admin is acting as a proxy for the Purchasing Request User, they will see the Purchase Request User's name below the SAP Concur logo on the left side of the page. In addition, a message displays that indicates they are acting as the selected user and replaces the **Profile** menu heading.



Exiting the Proxy State

The Invoice Admin can stop acting as a proxy user by clicking on the message that indicates they are acting as the selected user and then clicking **Done acting for others**.



Section 3: Configure Purchase Requests

Use this section to enable and configure the Purchase Request and Purchase Order feature.

The Basic Process

Implementing this feature requires some basic preparation and configuration prior to start using the feature. SAP Concur and the client will perform the following actions to configure and activate the feature:

1. **SAP Concur enables the Purchase Request feature:** SAP Concur enables this feature in an internal-only tool.
2. **Client configures purchase requests and purchase orders:** Once the feature is available in Concur Invoice, the client:
    - **Enters the company location ship-to and bill-to addresses:** The client administrator must enter a ship-to and a bill-to address in **Invoice** > **Company Locations** page of Product Settings
    - **Configures approval routing for purchase requests:** The client administrator defines how purchase request will be routed for approval in the **Approval Routing** page of Product Settings
    - **Configures controls and rules for purchase requests:** The client administrator defines controls and rules that comply with their company's policies in the **Compliance Controls** page of Product Settings
    - **Configures purchase orders:** The client administrator sets up the generation of purchase order numbers and any information they would like to transmit with the purchase orders in the **PO Configuration** page of Product Settings
    - **Configures Units of Measure:** The client administrator sets up the measurable identifier in the **Units of Measure** page of Product Settings
    - **Assigns roles to work with purchase requests and purchase orders:** The client administrator assigns the roles necessary for each user on the **Invoice** > **Users** page in Product Settings
    - **Adds the Purchase Request Approver:** The client administrator selects a purchase request approver for each user on the **Invoice** > **Users** page in Product Settings

Configuration/Activation

The following steps describe how to enable and configure the Purchase Request and Purchase Order feature, and how to assign user roles and purchase request approvers.

Step 1: Enable the Purchase Request and Purchase Order Feature

The SAP Concur admin enables the Purchase Request and Purchase Order feature in an SAP Concur internal-only tool. Once SAP Concur has enabled the feature, several purchase request steps appear in Product Settings.

Step 2: Add Ship-to and Bill-to Addresses

To ensure that the supplier knows where to ship the goods or services and whom to bill, the client administrator must add a ship-to and a bill-to address in the **Company Locations** sub step of the **Invoice** page of Product Settings. The admin can change or delete the ship-to or bill-to address. If the client admin deletes the ship-to or bill-to address, the record is only "soft deleted" and is still available to those requests that are using it.

The client admin may add as many ship-to and bill-to addresses as deemed necessary. To import or export multiple ship-to or bill-to addresses, client admins can use the Import or Export All functionality.

Once the client admin has added the ship-to addresses, the user can self-assign the available shipping address in **Profile** > **Profile Settings** > **Invoice Preferences**.

For more information, refer to the *Concur Invoice: Company Locations Setup Guide for Concur Standard Edition*.

Step 3: Configure Approval Routing for Purchase Requests

The **Approval Routing** page of Product Settings allows you to select the process that purchase requests will go through for approval. You can choose between the following routing possibilities, depending on your company's needs:

- Route to processor (default)
- Route to manager, then processor
- Route to manager, then authorized approver, and then processor
- Route to manager, then manager’s manager (up to five levels), and then processor

You can also choose whether managers and employees can add more approvers to the process. When the purchase request goes through final approval, it is ready to be exported and paid.

Further, as an administrator you can allow employees to recall submitted purchase requests at any time prior to a purchase request status of *Pending Payment*. SAP Concur has enabled this functionality by default.

Once recalled, the user can correct any errors or omissions and then resubmit the purchase request, or they can simply delete the request.

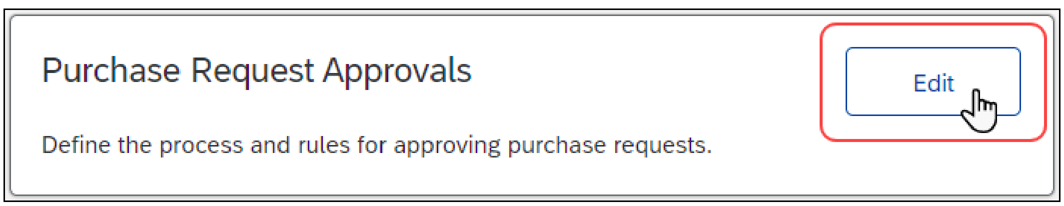
The admin can also select whether to allow the system to automatically transmit purchase orders and thereby reducing a workflow step. Once the administrator has activated this feature, Concur Invoice will transmit the purchase orders from the approved purchase request directly to the supplier.

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

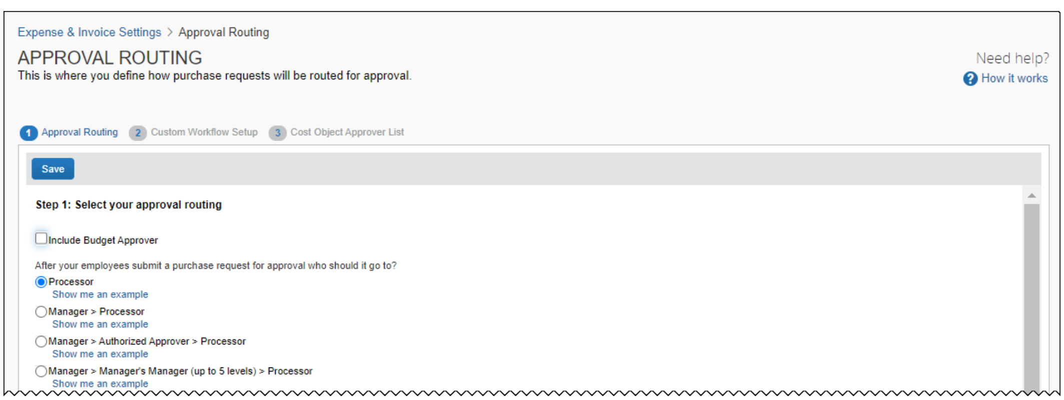
To access approval routing:

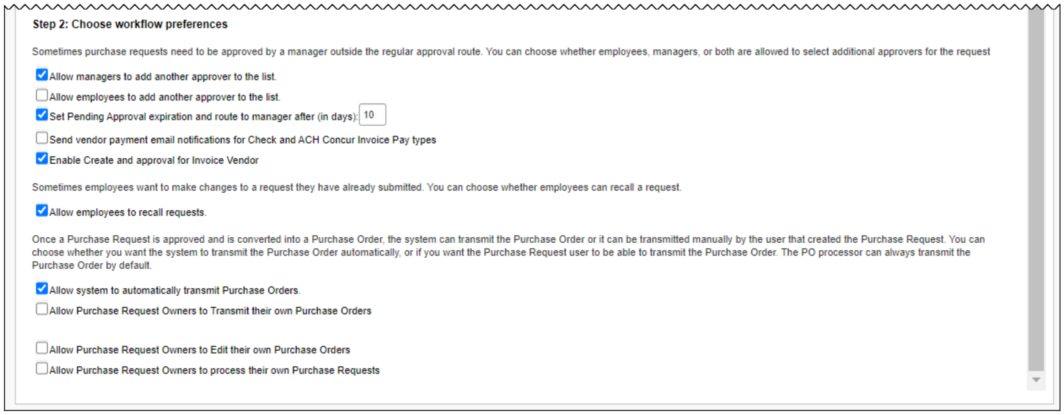
1. Click **Administration > Invoice Settings** or **Expense & Invoice Settings**.
2. In the **Product** list, click *Invoice*.

3. In the **Policy** section, on the **Purchase Request Approvals** tile, click **Edit**.



The **Approval Routing** page appears.





NOTE: Approval routing for purchase orders works the same way as for invoices, including custom workflows. If you want to assign a PO-based invoice to the original purchase request owner, refer to the *Concur Invoice: Approval Routing Setup Guide for Concur Standard Edition*.

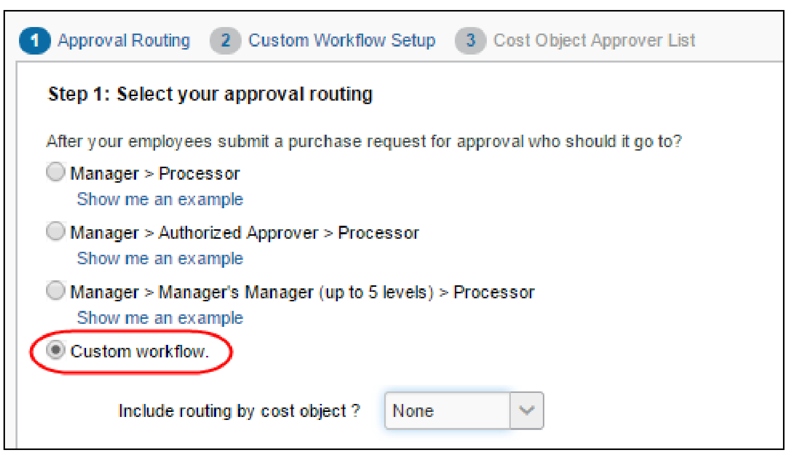
Custom Workflows

Client admins can tailor a custom approval routing workflow by ordering steps, defining rules, and managing cost object approvers.

NOTE: To activate custom workflows, contact your SAP Concur representative.

To choose custom workflow approval routing:

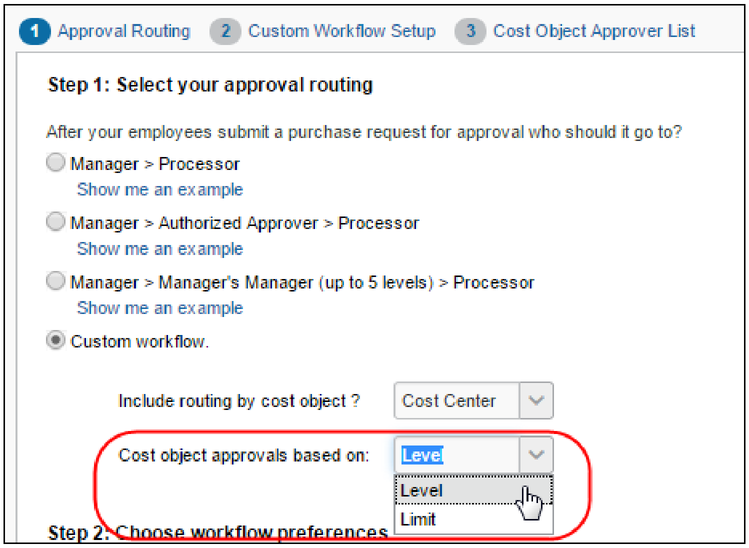
1. On the **Approval Routing** page, select the **Custom workflow** option.



2. (Optional) In the **Include routing by cost object?** list, select an option.

NOTE: The **Include routing by cost object?** list consists of the field names you assigned to custom fields configured through the **Custom Fields** feature. For more information, refer to the *Shared: Custom Fields Setup Guide for Concur Standard Edition*.

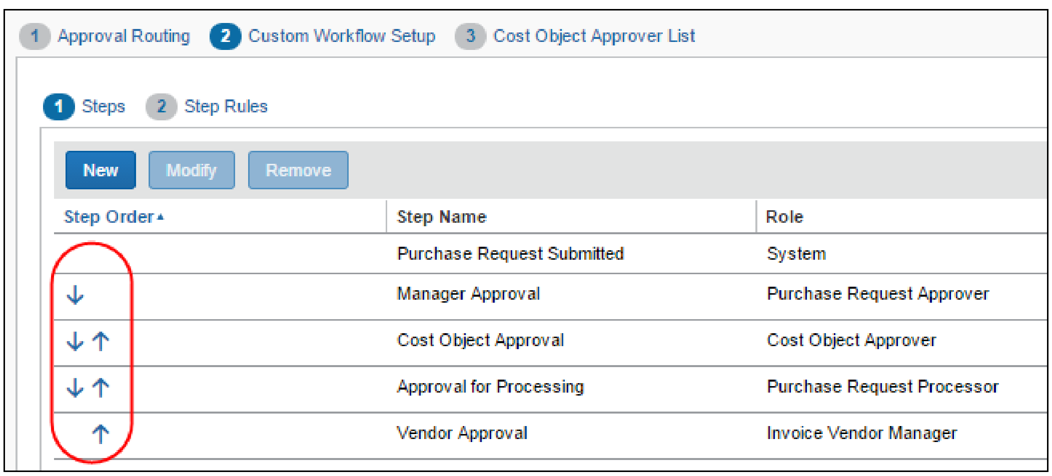
3. (Optional) If you selected a cost object, then in the **Cost object approvals based on** list, select either *Level* or *Limit*.



4. Click **Save**.

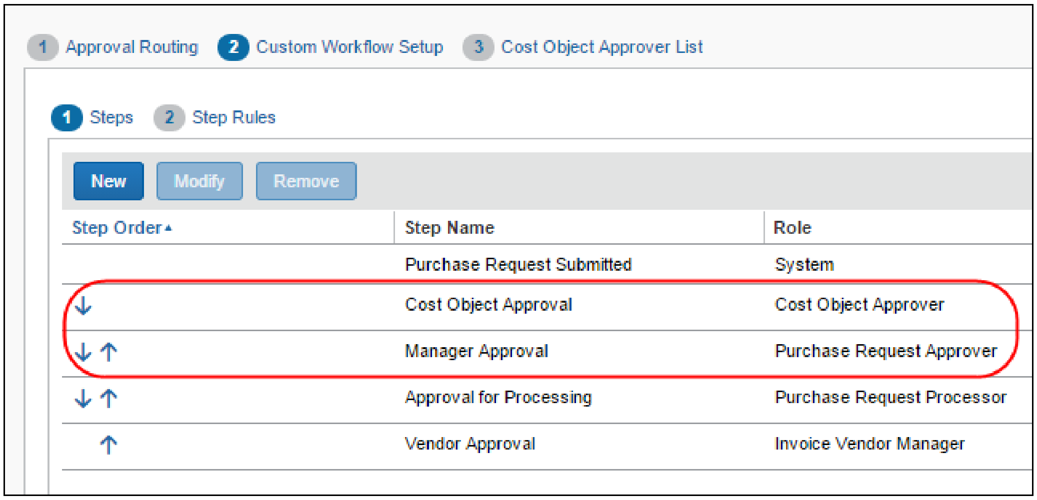
To reorder workflow steps:

1. On the **Steps** page, click the arrows in the **Step Order** column to move the step(s).



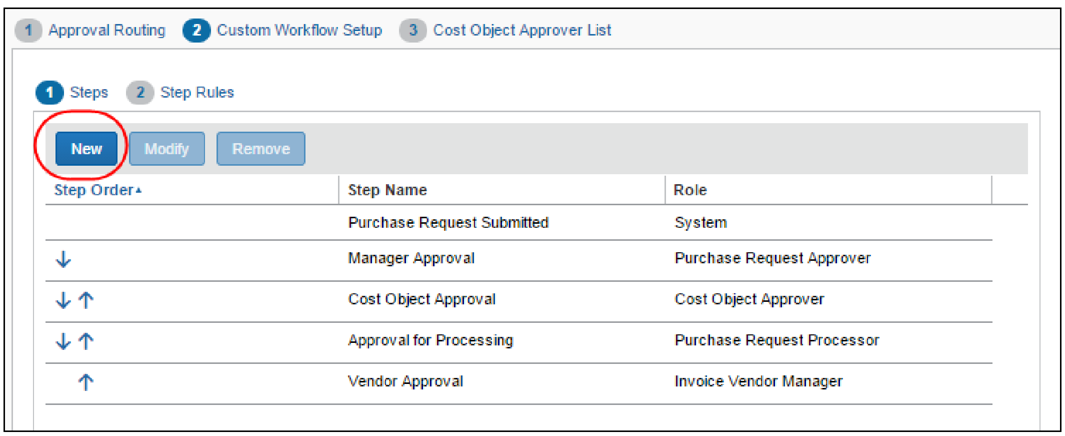
NOTE: You may reorder only those steps that have arrows and only in the direction of the arrows provided.

2. **Click Next.** You can now see that the Cost Object Approval step has moved up before the Manager Approval step.

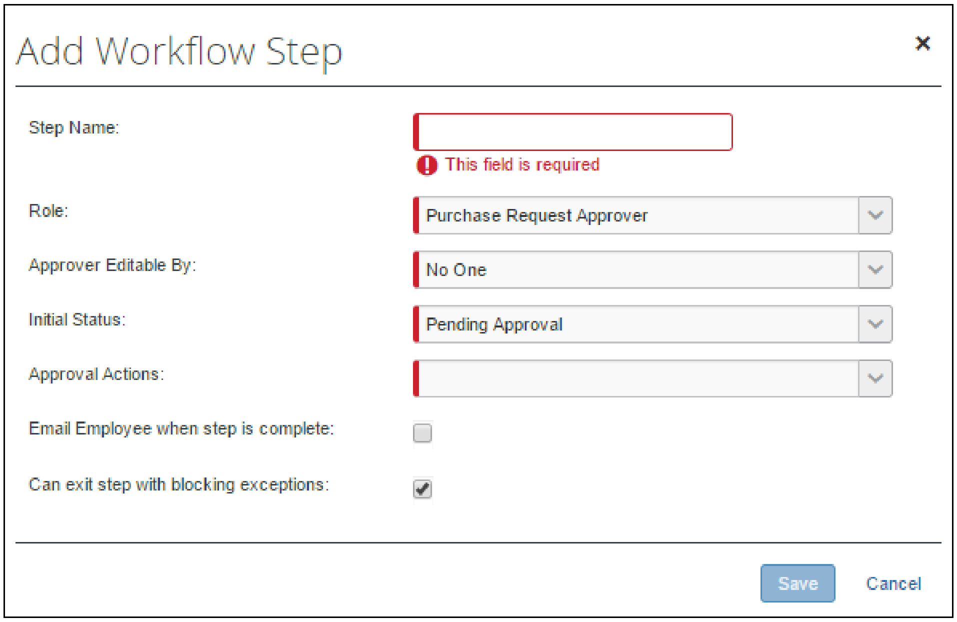


To add a new workflow step:

1. On the **Steps** page, click **New**.



The **Add Workflow Step** window appears.



2. Complete the following fields.

Field	Description
Step Name	Enter a name for the step.
Role	Select a role from the list. The role is responsible for moving the purchase request to the next step.
Approver Editable By	(Optional) Select from the list who, if anyone, is allowed to edit the approver. **NOTE**: This field only appears when you select an Approver in the **Role** field.
Initial Status	Select the approval status that represents the purchase request status at the time the step begins, such as *Pending Approval*. The employee can see this status.
Approval Actions	The options that appear here differ depending on the type of workflow and the selection made in the **Role** field. From the **Approval Actions** list, select an action that an approver can make to a purchase request that is awaiting approval. The actions you specify here are visible to the approver in Invoice. The approver decides which action to take.

Field	Description
Email employee when step is complete	Select (enable) this check box if you want to notify the employee after this step has completed. **NOTE**: The employee can turn off the delivery of workflow email notifications in their **Invoice Preferences** in **Profile**. This will suppress all workflow email notifications to that employee with the exception of the **Sent Back to Employee** notification.
Can exit step with blocking exceptions	Clear (disable) this check box to block the purchase request from progressing past approval in workflow (under certain conditions*). **NOTE:** Runtime or system exceptions are evaluated a second time (approver may clear fields, generating missing Required field type exceptions, etc.). In addition, if a rule exists on the second approval step, the blocking exception would trigger on entry to that step but allow the initial approval without triggering an exception. * If selected (enabled), the following blocking exception codes will *not* prevent the purchasing admin from approving the purchase request since the approver cannot clear these exceptions at this point of workflow: • **COW:** The right authority could not approve one or more cost objects. The purchase request moves to the next workflow step. • **CONOAPPR:** The cost object has no approvers. • **NOAPPR:** The previous step did not occur because the selected approver no longer has the approver role. Select another approver or contact the system administrator.

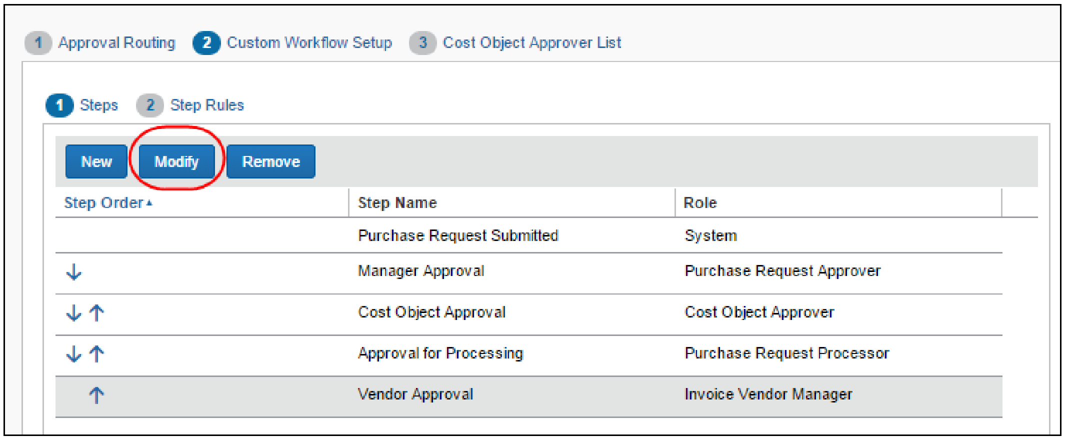
3. Click **Save**.

4. (Optional) Reorder the new steps.

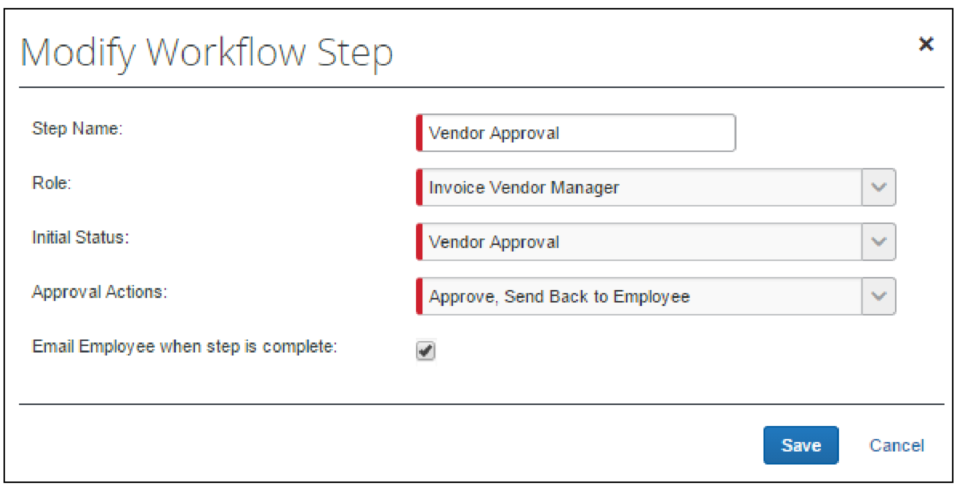
To modify existing steps:

1. On the **Steps** page, select the desired step.

2. Click **Modify**.



The **Modify Workflow Step** window appears.



3. Edit the step configuration as desired.

4. Click **Save**, and then click **Next** or **Done**.

To remove existing steps:

1. On the **Steps** page, select the desired step.

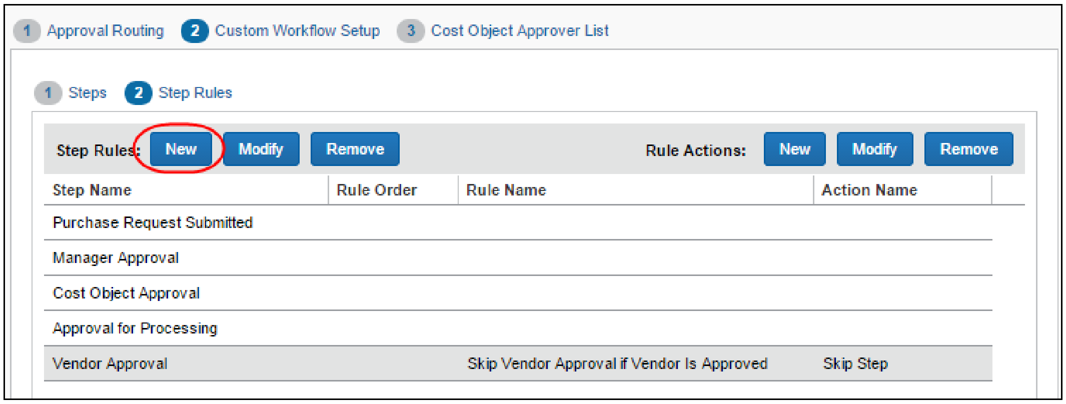
2. Click **Remove**.

3. At the **Remove Step** prompt, click **Yes**.

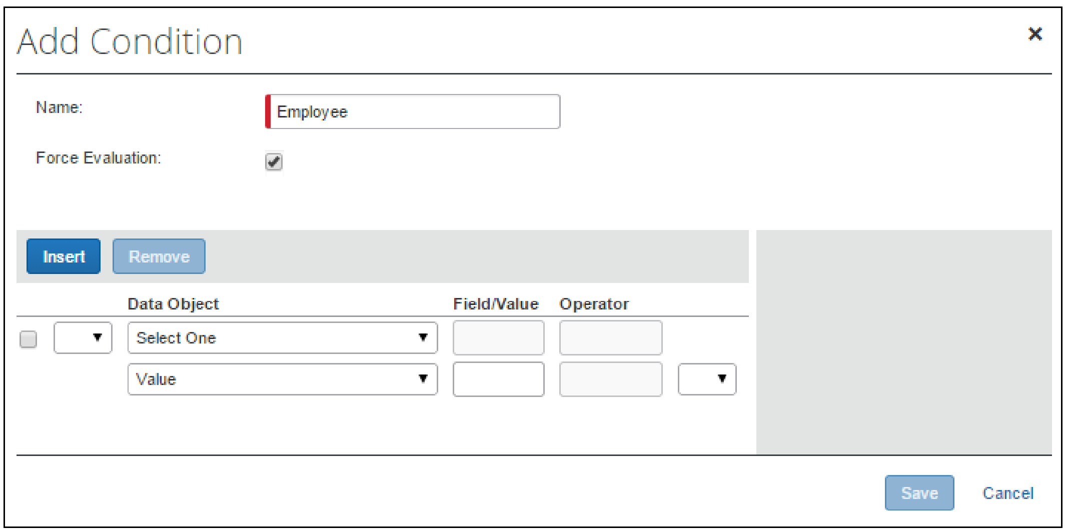
4. Click **Next** or **Done**.

To add new rules:

1. On the **Step Rules** page, in the **Step Rules** section, click **New**.



The **Add Condition** window appears.

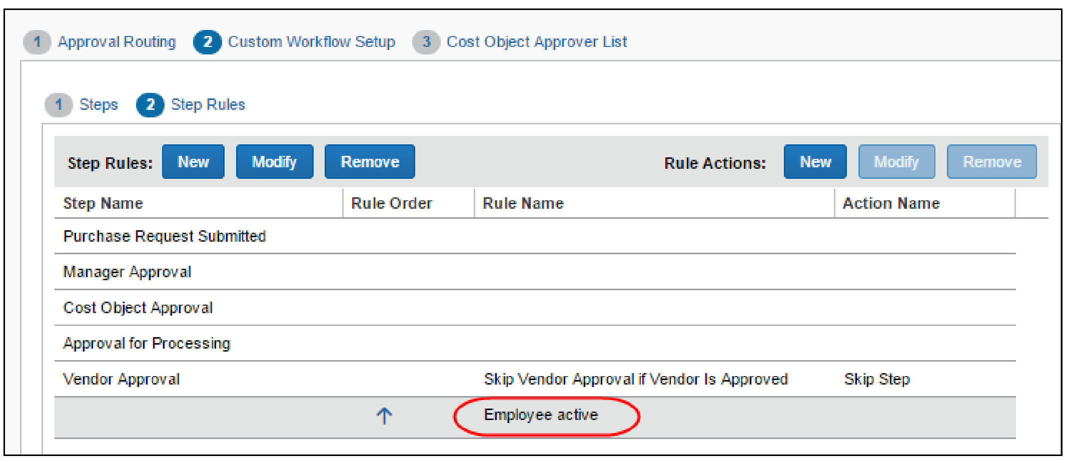


2. Create a condition by completing the following fields, and then click **OK**.

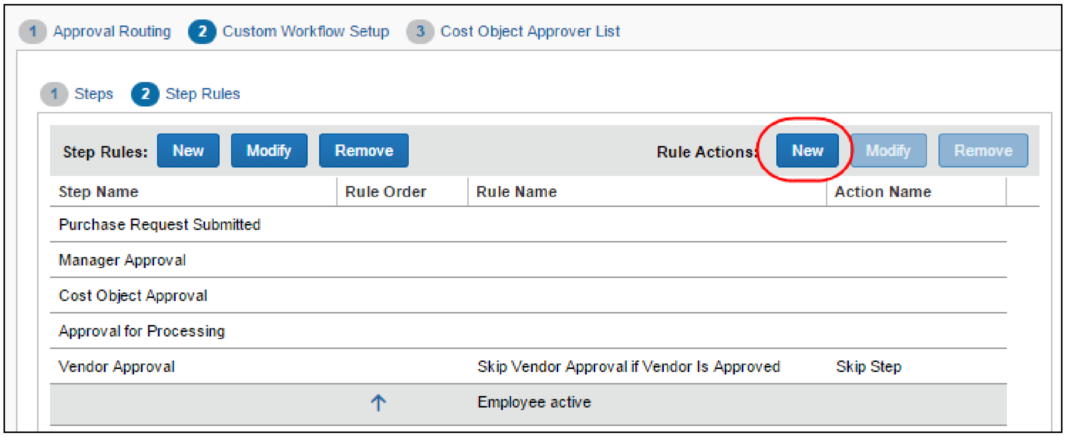
Field	Description
Name	Type any alphanumeric name for the workflow rule. The name does not have to be unique.

Field	Description
Force Evaluation	When you do *not* select this option, the system evaluates the rule and executes it only if all other rules in this step are determined to be false. When selected and there are multiple workflow rules, then the rule is evaluated regardless of whether the other rules are false or true. **Example:** Assume that you have a workflow step with two rules: 1. *If* a purchase request is less than 1,000 USD, *then* skip this step. 2. *If* an entry is Seminar Fees, *then* generate an exception. In this case: • If not selected, if the purchase request is less than 1,000 USD, then it does *not* evaluate the next rule to see if it is for Seminar Fees. If the purchase request is more than 1,000 USD, then it evaluates the next rule, continuing to do so until it finds a rule that is true, then it stops evaluating. • If selected, then the product evaluates both rules and executes both actions if both are true.

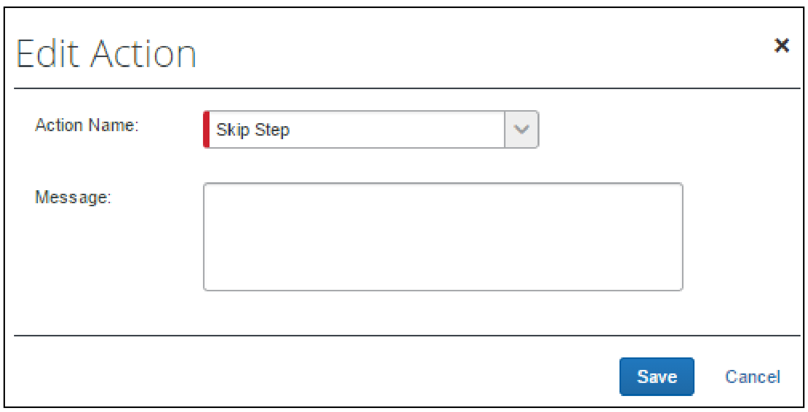
The new rule appears on the **Step Rules** page.



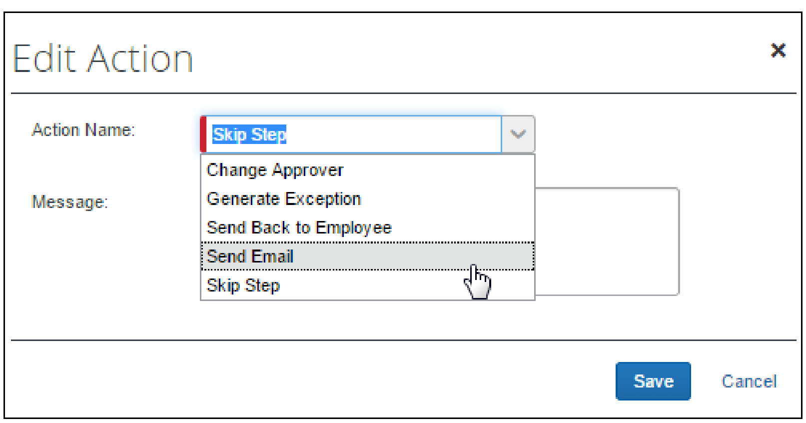
3. To add the action, in the **Rule Actions** section, click **New**.



The **Edit Action** window appears.



4. In the **Action Name** list, select the desired action.



NOTE: You may have multiple actions, but they cannot conflict with each other. If they do, an error message appears.

Once you choose an action from the list, the page refreshes and provides any fields needed for the action you selected.

5. Complete the remaining action field(s).

Action	Description
Change Approver	Select an approver. When the criteria for this condition occur, the system routes the purchase request to the approver designated here.
Generate Exception	Select an exception from the helper pane or create a new one. A message appears to those you designate in the **Exception Visibility** field.
Send Back to Employee	Enter a comment that the employee will see, explaining why the purchase request returned to the employee. This comment is visible wherever purchase request comments are available to the employee, approver, and/or purchasing admin.
Send Email	You may: • Select an email recipient or select **Default Approver** to send it to that approver • Select a standard email template from the **Email Notification** list or type text directly into the **Email Subject** and **Message text** fields.
Skip Step	Type a message in the **Message** field. This message is visible wherever request comments are available to the employee, approver, and/or purchasing admin.

6. Click **Save**.

7. When done with all rules and actions, click **Done**.

To modify existing step rules:

1. On the **Step Rules** page, select the desired step.

2. Click **Modify**.

3. Edit the step configuration as desired.

4. Click **Done**.

To remove existing step rules:

1. On the **Step Rules** page, select the desired step.

2. Click **Remove**.

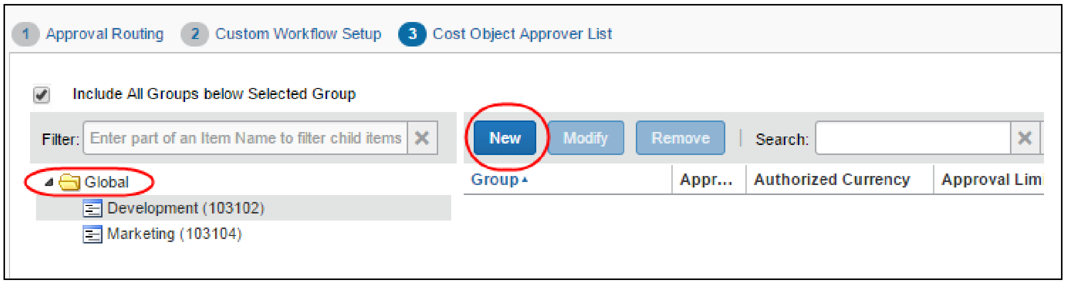
3. At the **Remove Step** prompt, click **Yes**.

4. Click **Done**.

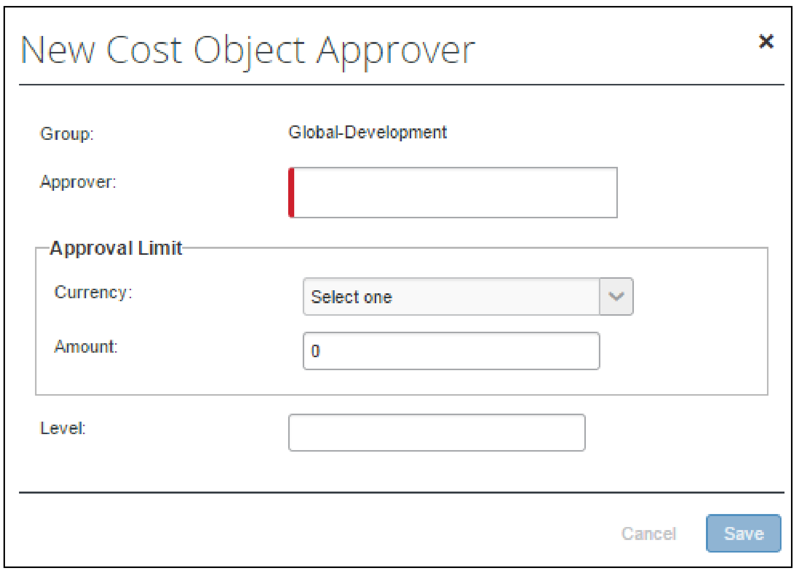
To enter a cost object approver:

1. On the **Cost Object Approver List** page, click the arrow next to **Global** to display the cost object list. The list reflects your configuration from the **Custom Fields**: **List Items** page.

2. Click a cost object from the list to enable the **New** button.



3. Click **New**. The **New Cost Object Approver** window appears.



4. In the **Approver** field, search for and select an approver.

NOTE: Only current approvers are available for selection. Complete the **Users** page in Product Settings and then come back to the **Cost Object Approver List** page.

5. Then:
   - For limit-based cost object approval, select a currency and enter an amount.
   - For level-based cost object approval, enter a level.

NOTE: The configuration of the cost object workflow on the **Approval Routing** page defines the type, either limit or level. If you complete both areas in this window, the **Approval Limit** area and the **Level** field, SAP Concur will use the one that applies to your configuration and ignore the other.

---

6. Click **Save**.

To modify a cost object approver:

1. On the **Cost Object Approvers List** page, click **Global** to display the cost object list.
2. Select a cost object list item.
3. In the right pane, select an approver.
4. Click **Modify**.
5. Modify the configuration as desired.
6. Click **Save**.

   An edit to a cost object approver record goes into effect immediately upon save. You can use the new values to search for and evaluate that approver from the point of save forward.

   Any purchase requests currently assigned to the edited cost object approver will use the new values in determining whether the request is limit approved or level approved on approval.

To remove a cost object approver:

1. On the **Cost Object Approver List** page, click **Global** to display the cost object list.
2. Select a cost object list item.
3. Select a cost object approver.
4. Click **Remove**.
5. On the prompt, click **Yes**.

   Removing the cost object approver permissions for a user does not delete the **Is Purchase Request Approver** role, nor does it delete the approver from the system. It simply removes the capabilities of the cost object approver. The approver is no longer available when a workflow step calls for a cost object approver.

If a purchase request is in the approver's queue when the cost object approver is deleted, the request is flagged with an exception (COW - The right authority could not approve one or more cost objects) and moved to the next workflow step.

If the purchase request has not yet reached the approver, the workflow adjusts accordingly. Since Concur Invoice evaluates the approver at the time the prior step is completed, the purchase request simply moves to a different cost object approver.

For more information about custom workflows, refer to the *Concur Invoice: Workflow Setup Guide*.

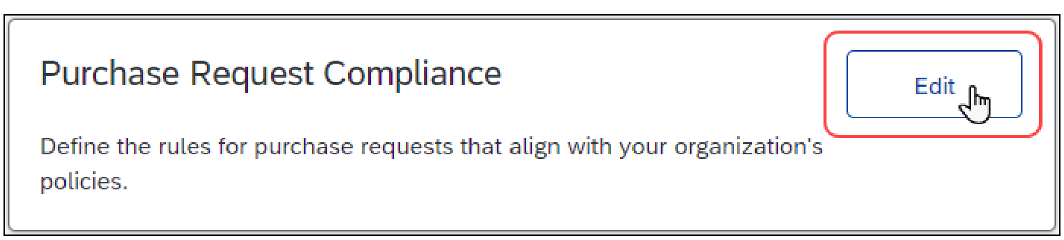
Step 4: Configure Controls and Rules for Purchase Requests

The **Compliance Controls** page allows the client administrator to set a system response for user actions that do not comply with set rules. Typically, a rule is broken when the user tries to save or submit a purchase request. If the client admin selects (enables) the **Check if Purchase Request has the appropriate back-up documentation** rule option on the **Modify Compliance Controls** page, Concur Invoice performs a check for included images and, if not found, the system prevents the user from submitting the purchase request or displays a warning message to the user.

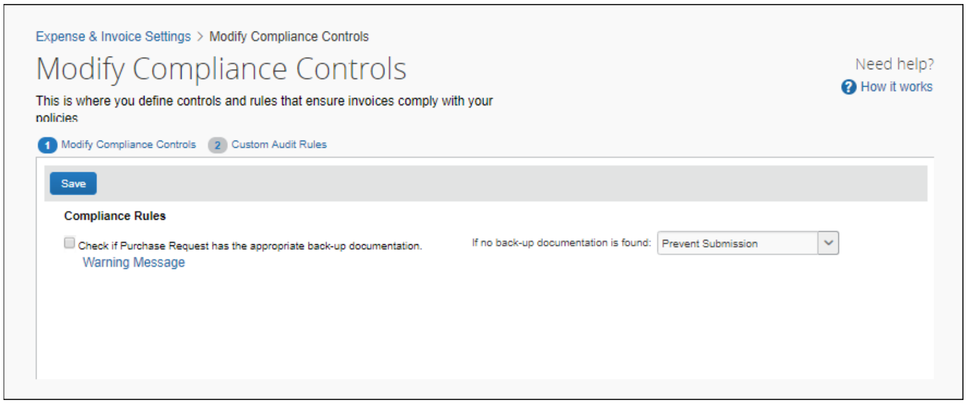
If your company requires additional compliances rules, you may create custom audit rules to purchase order events. When you create a custom audit rule, you specify the event that triggers the rule. When a user performs an event that has a custom audit rule, the system triggers the rule and generates an exception, which prevents the system to save or transmit the purchase order to the vendor before the purchasing admin has reviewed it.

To access compliance controls:

1. Click **Administration > Invoice Settings** or **Expense & Invoice Settings**.
2. In the **Product** list, click *Invoice*.
3. In the **Policy** section, on the **Purchase Request Compliance** tile, click **Edit**.

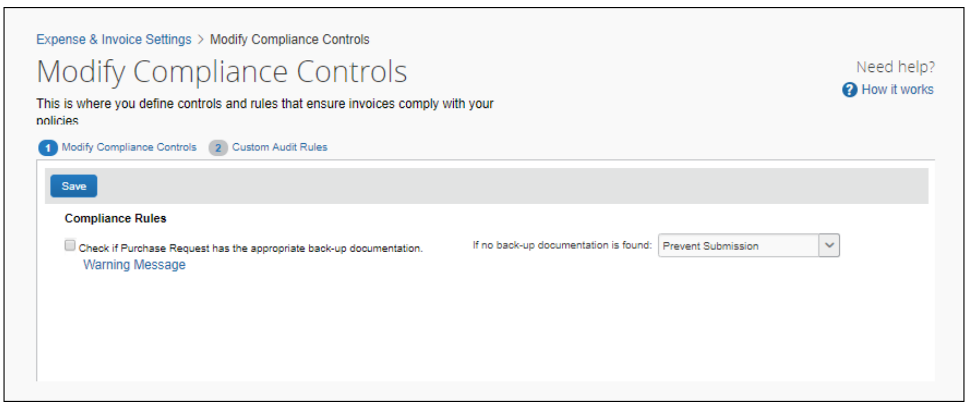


The **Modify Compliance Controls** page appears.

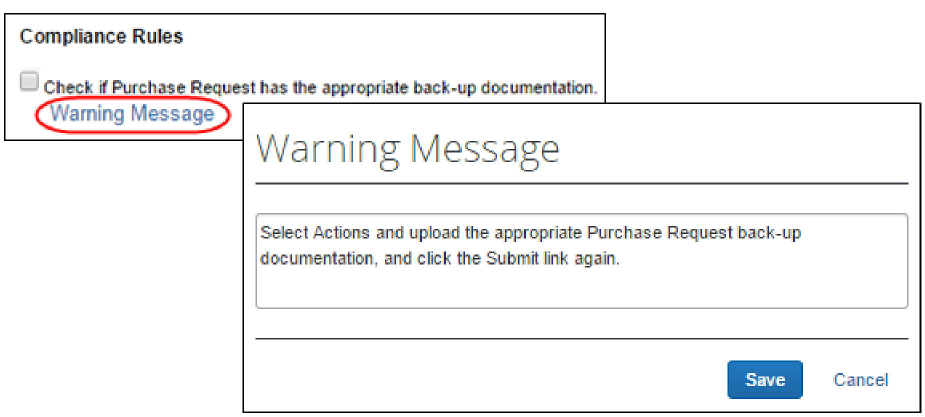


To check if a purchase request has the appropriate back-up documentation:

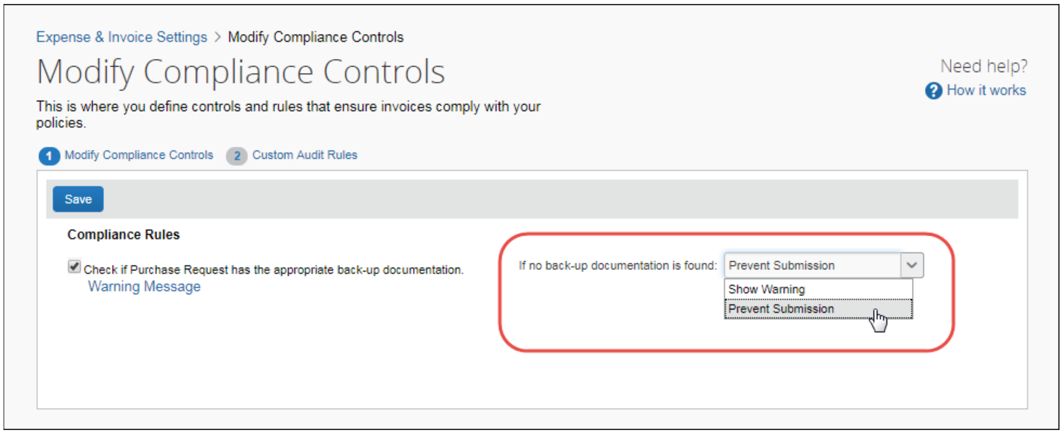
1. On the **Modify Compliance Controls** page, select (enable) the **Check if Purchase Request has the appropriate back-up documentation** option.



2. (Optional) Review and edit the message the user will see by clicking **Warning Message**, and then click **Save**.



3. (Optional) Set the event when the rule is broken (either prevent submission or warn the user).



4. Click **Save**.

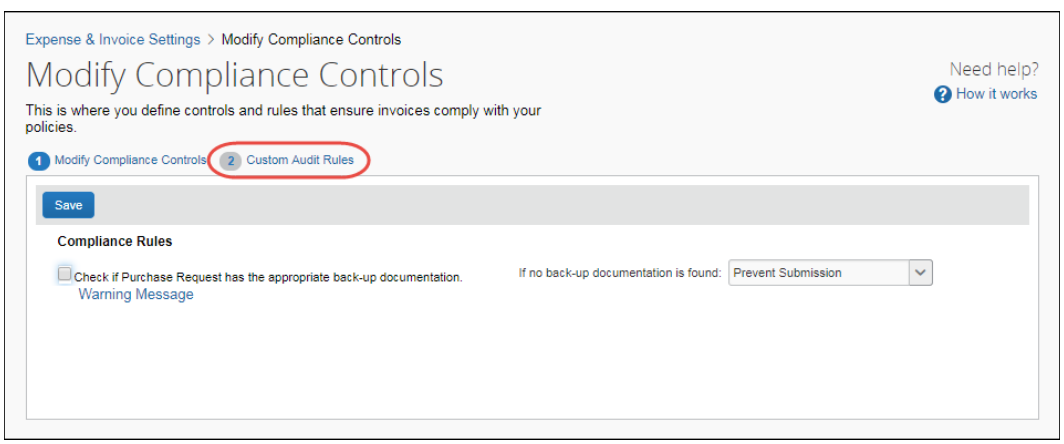
Custom Audit Rules

A *custom* audit rule is used to monitor information entered by purchase request users and is triggered by an event. For example, assume an administrator creates a rule that monitors unapproved vendor addresses and that the user triggers the rule when saving a request. Then, when the user saves a purchase request associated with an unapproved vendor address, the system generates an exception.

NOTE: To activate custom audit rules, contact your SAP Concur representative.

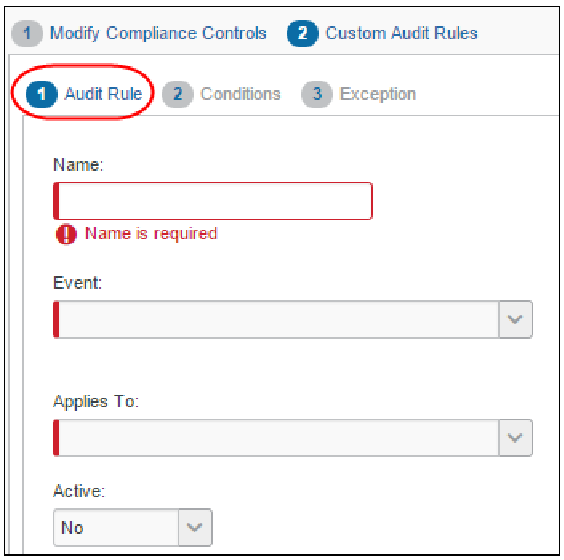
▶ *To add a custom rule to a purchase request:*

1. On the **Modify Compliance Controls** page, click **Custom Audit Rules**.



2. On the **Compliance Controls – Custom Audit Rules** page, click **New**.

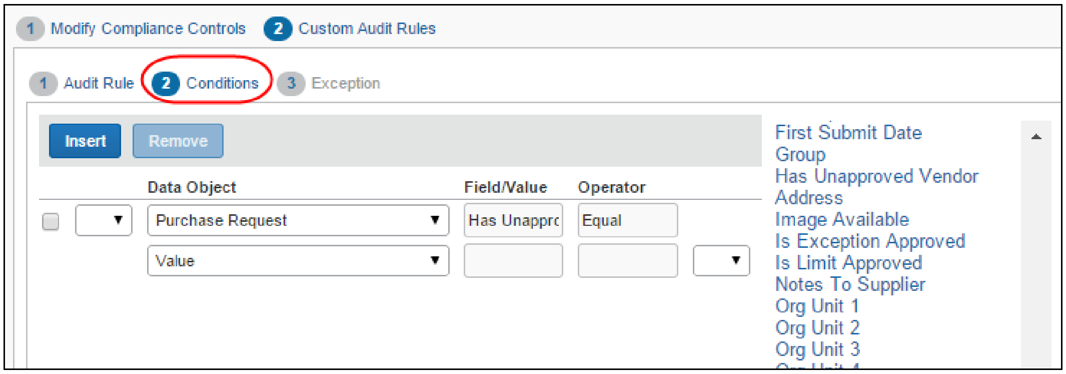
3. In the **Audit Rule** step, complete the appropriate fields by referring to the table below.



Setting	Description/Action
Name	Type a unique name for the rule.
Event	Select the event that triggers the rule: • Purchase Request Distribution Save • Purchase Request Item Save • Purchase Request Save • Purchase Request Submit
Applies To	Select the appropriate group. The groups that you see here are the groups that you added on the **Policy Groups** page.
Active	Select *Yes* to activate the rule upon completion.

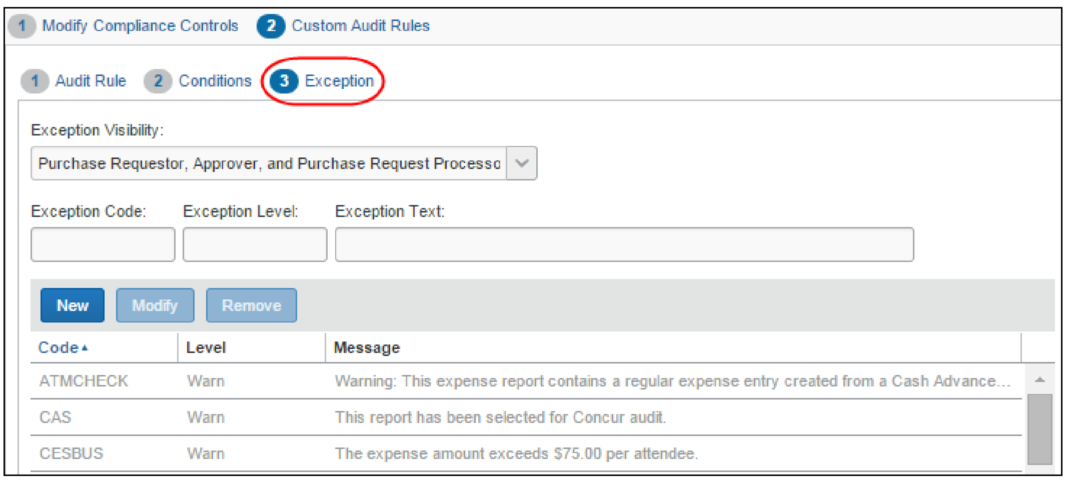
4. Click **Next**.

5. In the **Conditions** step, complete the appropriate fields, making selections from the **Select Field** list.



6. (Optional) Click **Insert** to add more conditions.

7. Click **Next**. The **Exception** step appears.



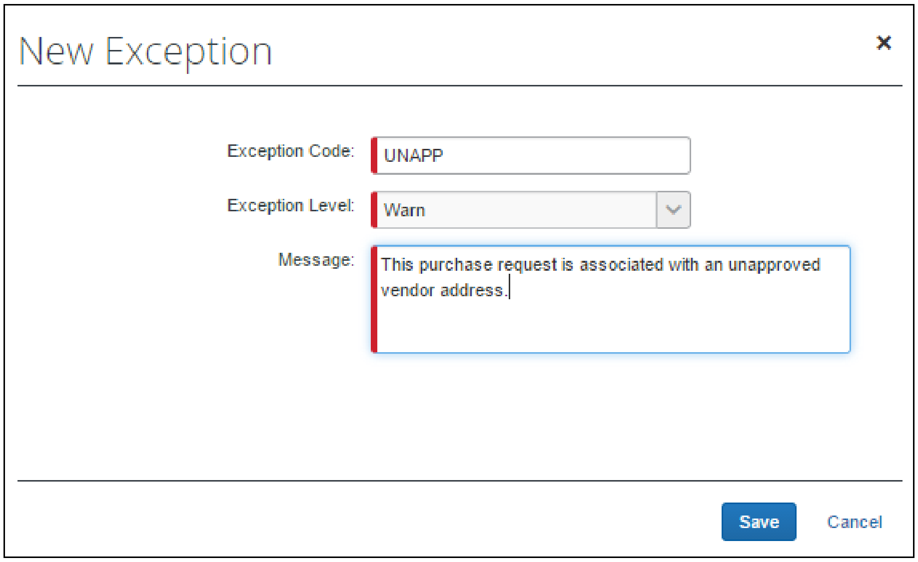
8. In the **Exception Visibility** list, select the users who are able to see the exception message by selecting one of the following:

- Purchase Requestor, Approver, and Purchase Request Processor
- Approver and Purchase Request Processor
- Purchase Request Processor

9. For the exception, you can:
   - Use an existing exception

     To use an existing exception, select the desired exception.
   - Create a new exception

     To create a new exception, click **New**. The **New Exception** window appears. Complete the fields and then click **Save**.



10. Click **Done**.

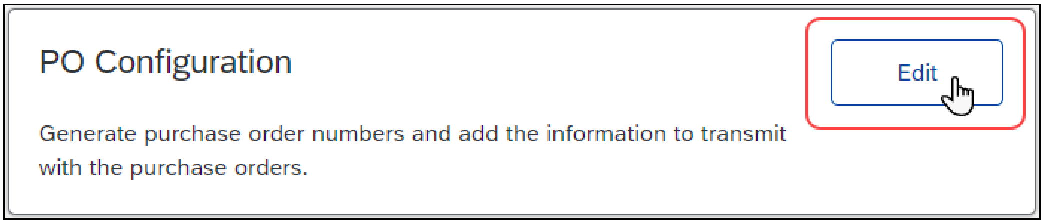
For more information about custom audit rules, refer to the *Concur Invoice: Custom Audit Rules Setup Guide*.

Step 5: Configure Purchase Orders

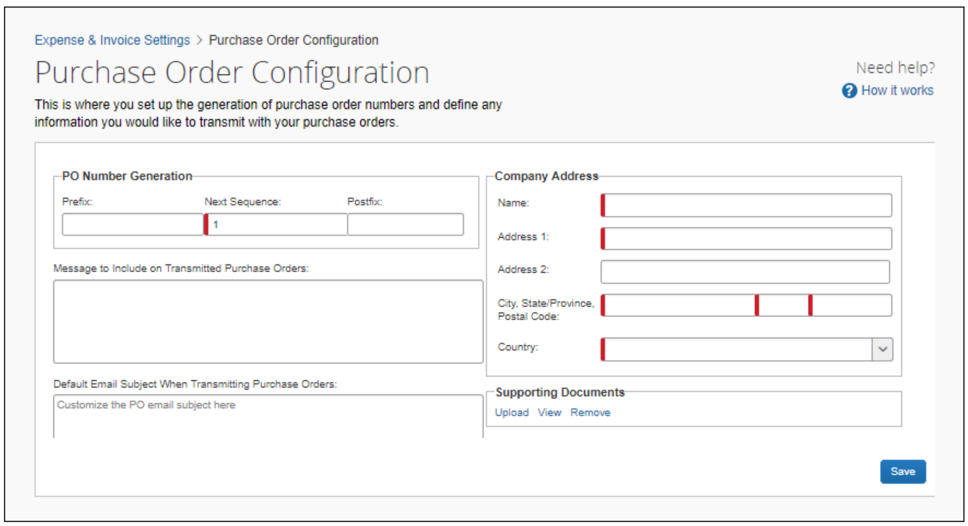
The client admin uses the **Purchase Order Configuration** page to set up the generation of purchase order numbers and to define any information that should be transmitted with the purchase order.

To access PO configuration:

1. Click **Administration > Invoice Settings** or **Expense & Invoice Settings**.
2. In the **Product** list, click *Invoice*.
3. In the **Capturing Spend** section, on the **PO Configuration** tile, click **Edit**.

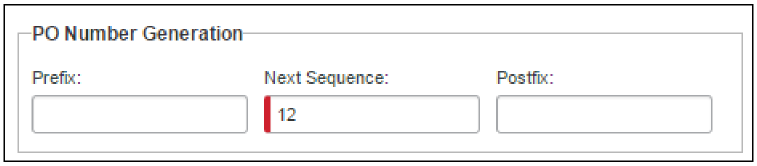


The **Purchase Order Configuration** page appears.

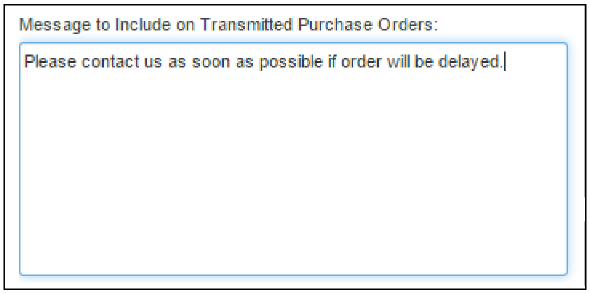


To configure purchase orders:

1. In the **PO Number Generation** section, enter the following information:
   - In the **Prefix** field, type any sequence of characters or numbers that should precede the incremental PO number in the **Next Sequence** field
   - In the **Next Sequence** field, type the incremental PO number that the system will assign 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)
   - In the **Postfix** field, type any sequence of characters or numbers that should be placed after the incremental PO number in the **Next Sequence** field (for example, the purchasing agent's initials)



2. In the **Message to Include on Transmitted Purchase Orders** section, type instructions you want the vendor to note and follow:



NOTE: This field is limited to 3,200 characters.

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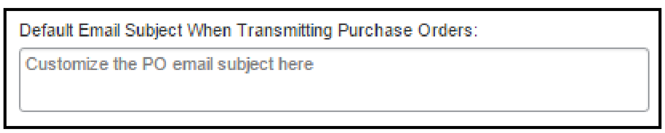
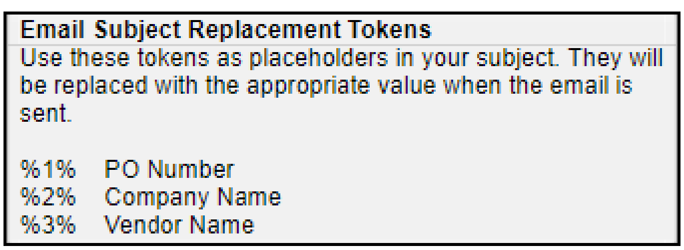
3. In the **Default Email Subject When Transmitting Purchase Orders** section, type the text that will appear in the subject field of the email to the vendor. You can customize the subject of the email.

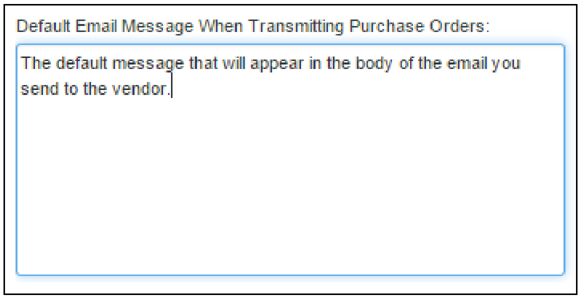


NOTE: This field is limited to 500 characters.

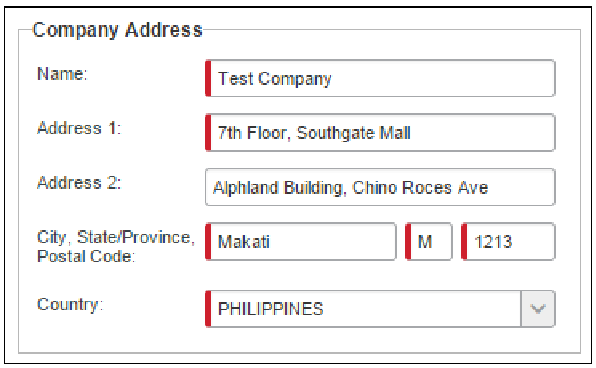
When the admin clicks the **Default Email Subject When Transmitting Purchase Orders** field, they will see a tool tip with information (tokens) about how to enter text in the field.



4. In the **Default Email Message When Transmitting Purchase Orders** section, type the text that will appear in the body of the email sent to the vendor (you can change this message as you review the PO prior to transmittal)



5. In the **Company Address** section, type the company address.



When you have filled in the company address, this address information will automatically populate the bill-to and/or ship-to address in **Company Locations** sub step of the **Invoice** page of Product Settings.

NOTE: Invoice will only create a bill-to or ship-to address automatically if no bill-to or ship-to address exist.

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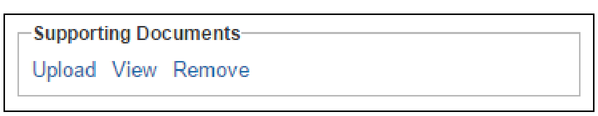
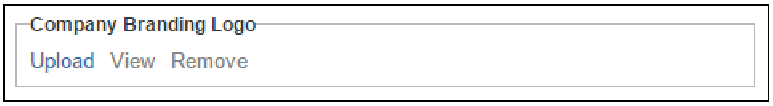
6. In the **Supporting Documents** section, click **Upload** to upload the documents that support the purchase order transmittal. These documents will be included when the supplier receives the PO. You can view or remove documents by clicking **View** or **Remove** respectively.



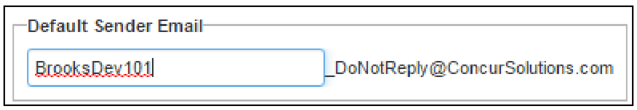
7. In the **Company Branding Logo** section, click **Upload** to upload the company logo into Concur Invoice, so that vendors viewing purchase order PDFs will see the company logo. The logo is group-aware in the same way as the purchase order configuration and clients can only update one company logo 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.

- In the **Default Send Email** field, type in a desired prefix for the default sender address for purchase order transmission emails. 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.

8. Click **Save**.

The default message appears for review when the purchasing admin opens the PO and clicks **Preview**. This opens the PO in PDF format, where the purchasing admin can correct selected areas (in the **Email Details** section).

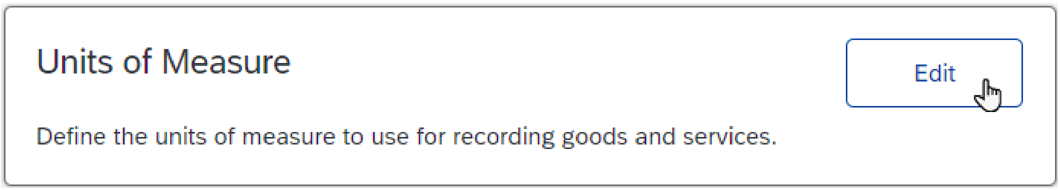
Step 6: Configure Units of Measure

On the **Units Of Measure** page, the client admin can add, edit, and soft-delete (it may be in use) a measurable identifier that is related to a spend type (Good or Service, or both). This way, admins can add a unit that is meaningful to their business type or approach to identify spend.

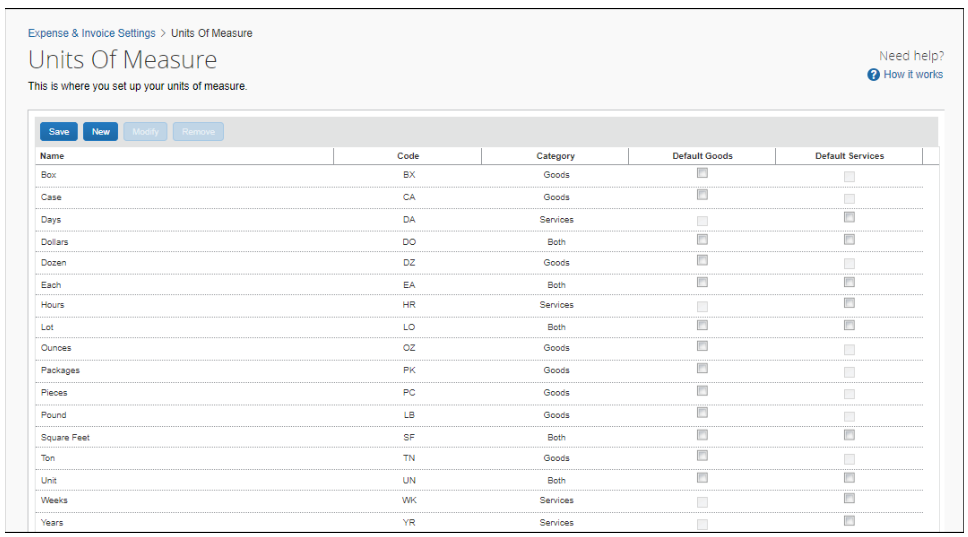
A set of default units are included, such as *Box*, *Hours*, and *Each*. These are associated with a spend type (in the **Category** column) and **Default Services** and **Default Goods** check boxes that let the administrator specify a *single* unit type that will always appear as the default choice when selecting either the Good or Service spend type when a user creates a purchase request.

- ***To access units of measure:***

1. Click **Administration > Invoice Settings** or **Expense & Invoice Settings**.
2. In the **Product** list, click *Invoice*.
3. In the **Capturing Spend** section, on the **Units Of Measure** tile, click **Edit**.

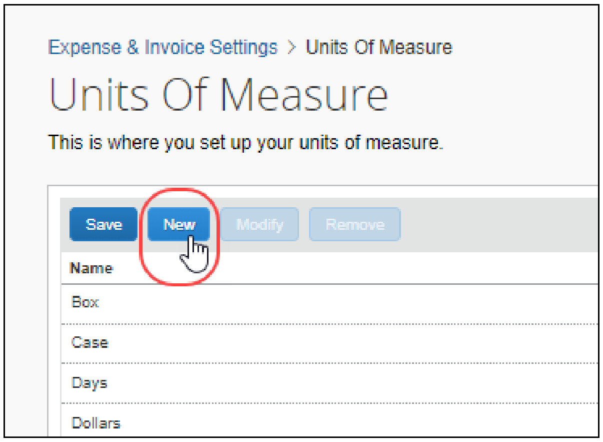


The **Units Of Measure** page appears.

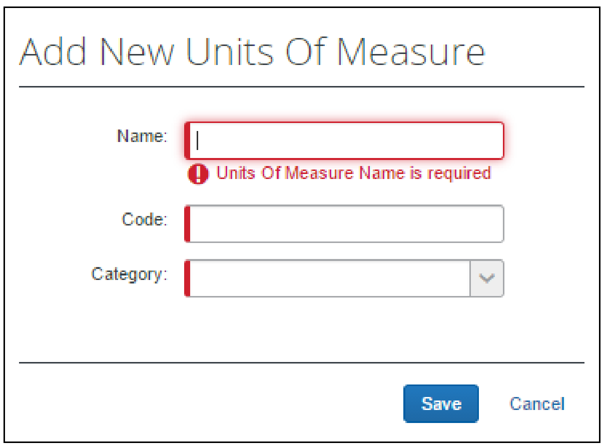


To configure units of measure:

1. On the **Units Of Measure** page, click **New**.



The **Add New Units Of Measure** window appears.



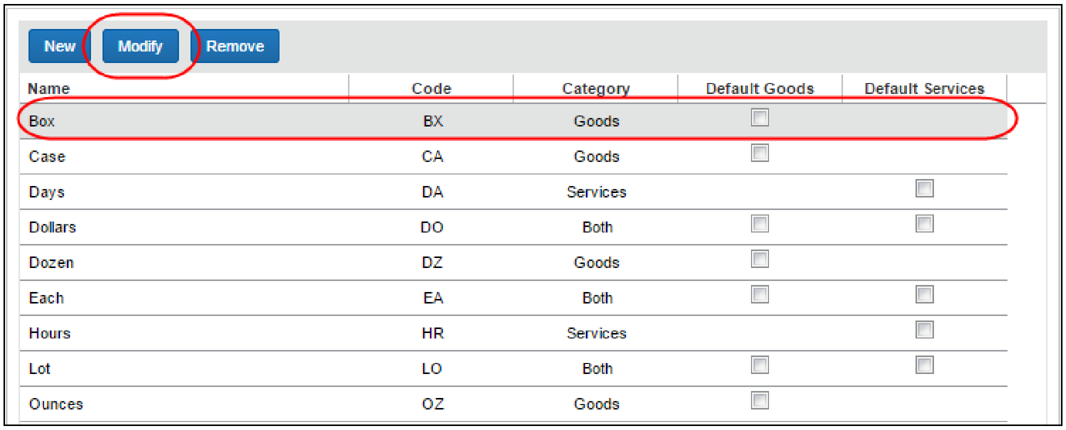
2. Enter information into the fields based on the table below.

Setting	Description/Action
Name	This is the name of the measurable identifier. Add a name for the new unit of measure.
Code	Select an arbitrary code for the measurable identifier. SAP Concur recommends that you choose two-letter code.
Category	This is the spend type of the unit of measure. In the list, select one of the following categories: Services Goods Both

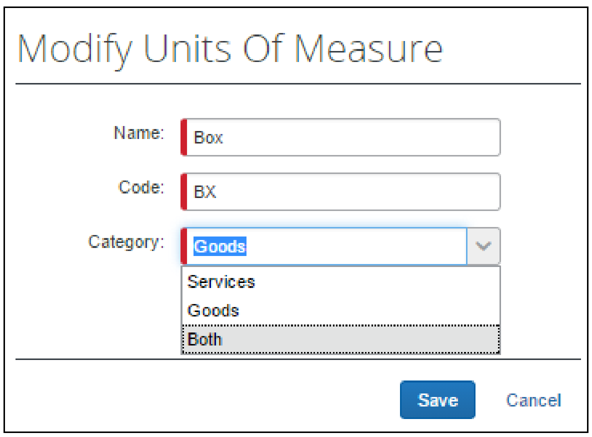
3. Click **Save**.

To modify units of measure:

1. On the **Units Of Measure** page, select a row, and then click **Modify**.

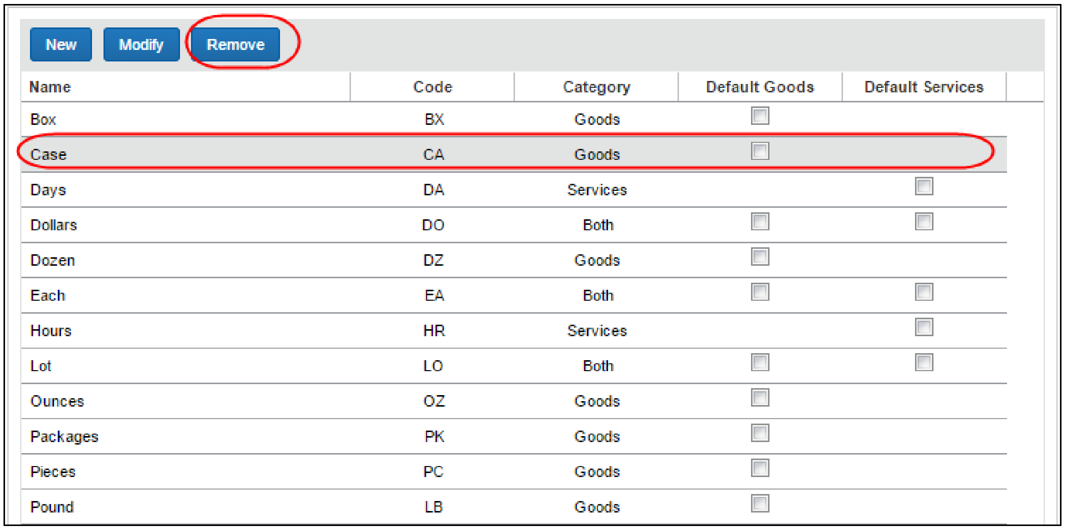


2. In the **Modify Units Of Measure** window that appears, change the relevant fields, and then click **Save**.



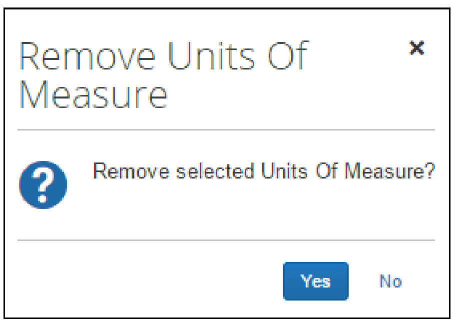
To delete units of measure:

1. On the **Units Of Measure** page, select a row, and then click **Remove**.



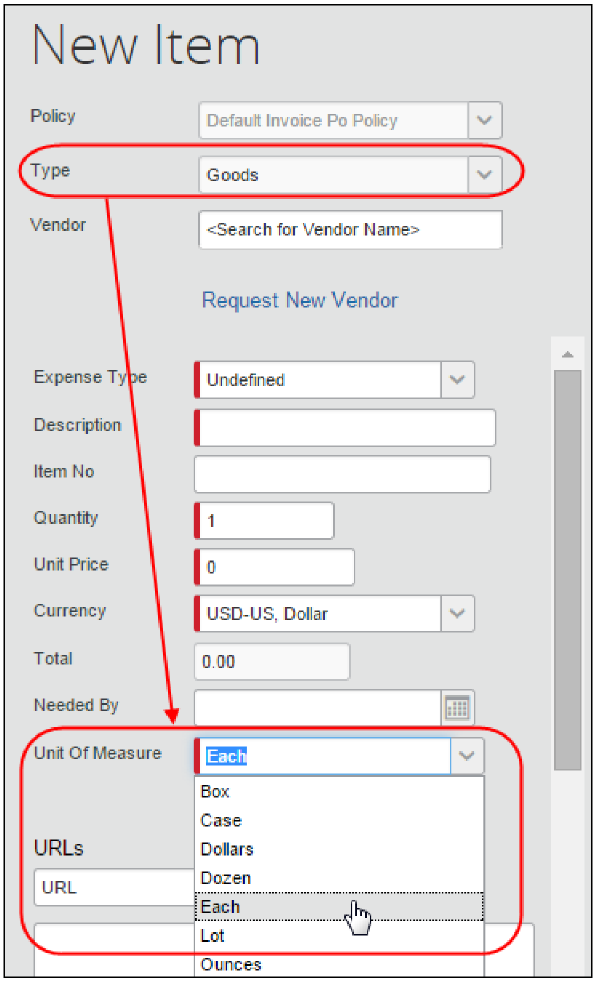
Name	Code	Category	Default Goods	Default Services
Box	BX	Goods	☐	
Case	CA	Goods	☐	
Days	DA	Services		☐
Dollars	DO	Both	☐	☐
Dozen	DZ	Goods	☐	
Each	EA	Both	☐	☐
Hours	HR	Services		☐
Lot	LO	Both	☐	☐
Ounces	OZ	Goods	☐	
Packages	PK	Goods	☐	
Pieces	PC	Goods	☐	
Pound	LB	Goods	☐	

2. In the **Remove Units Of Measure** window, click **Yes**.



HOW UNITS OF MEASURE APPEAR TO THE USER WHO CREATES AN ITEM

The units of measure appear when the purchase request user creates an item, and it varies depending on the spend type. For example, in the figure below, the user has selected the *Goods* spend type, and the associated Goods units of measure are available for selection. Note that the default selection for Goods is the one specified as the default in the **Units of Measure** page of Product Settings (in this case *Each*).



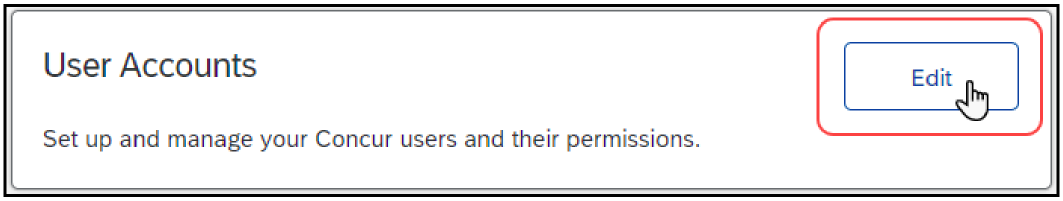
Step 7: Assign Roles to Work With Purchase Requests and Purchase Orders

On the **Users** page, client administrators can assign different roles to users who work with purchase requests and purchase orders.

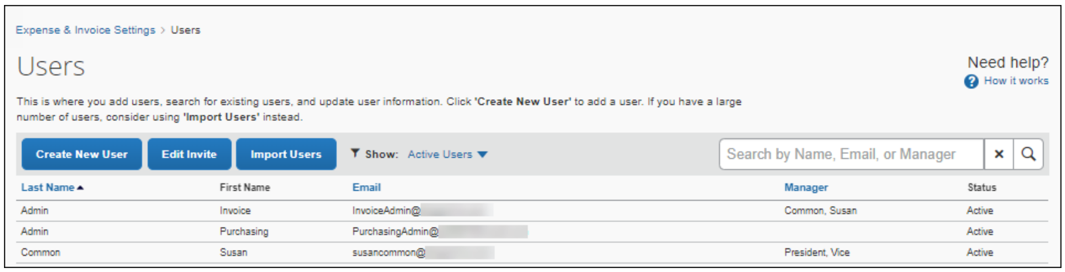
- ***To access user information:***

1. Click **Administration > Invoice Settings** or **Expense & Invoice Settings**.
2. In the **Product** list, click *Invoice*.

3. In the **Access To Concur** section, on the **User Accounts** tile, click **Edit**.



The **Users** page appears.



To assign roles to work with purchases requests and purchase orders:

1. On the **Users** page, click **Create New User** to create a new user and assign the desired role to that user or double-click the row for the existing user to whom you want to assign the desired role. Use the table that follows to determine which role(s) should be assigned to the user.

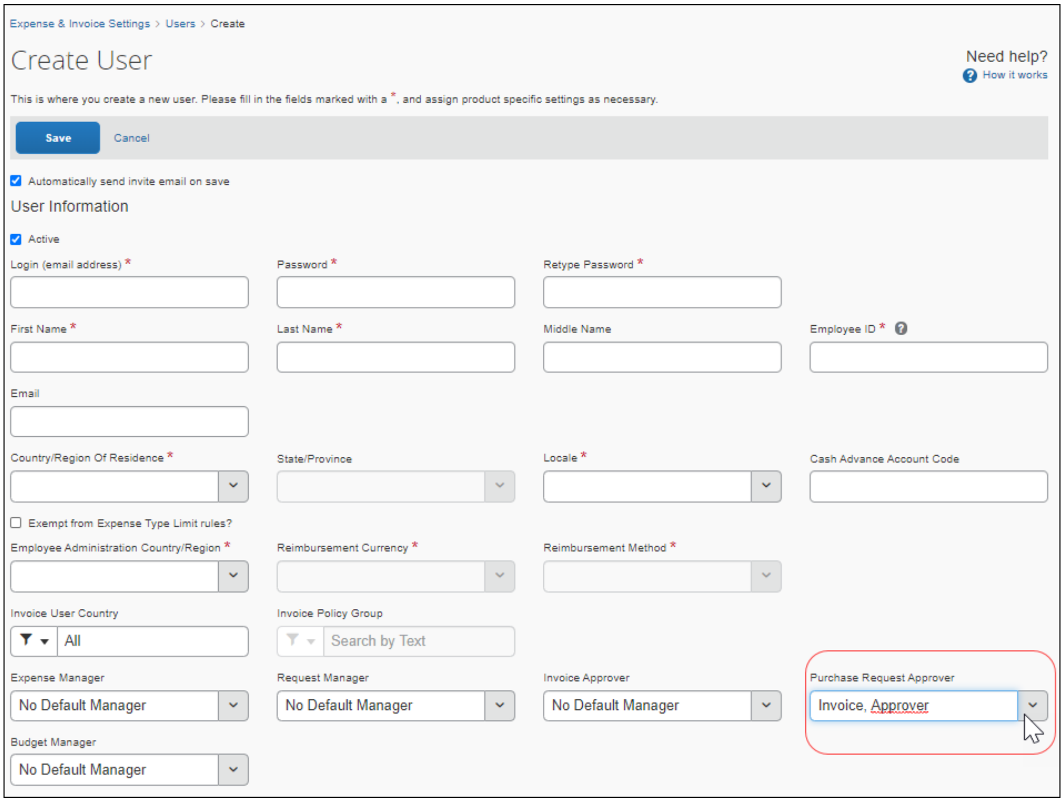
Setting	Description
Is Purchase Request User?	Users with this role can create purchase requests (the "Requester").
Is Purchase Request Approver?	Users with this role can approve purchase requests that the purchase request user has created.
Authorized Limit Approval?	Users who have authorized limit approval can only approve purchase requests up to a certain amount specified in the field next to the currency list. **NOTE:** The client admin must have selected the Is Invoice Approver role to set an authorized limit approval for the user.
Is Purchasing Admin?	Users with this role can process purchase requests (for example, clear exceptions and send back untransmitted purchase requests) and purchase orders (for example, correct vendor and send back both untransmitted and transmitted purchase requests).

2. Click **Save**.

To assign a purchase request approver:

1. On the **Users** page, click **Create New User** to create a new user or double-click the name of the existing user to whom you want to assign a purchase request approver.

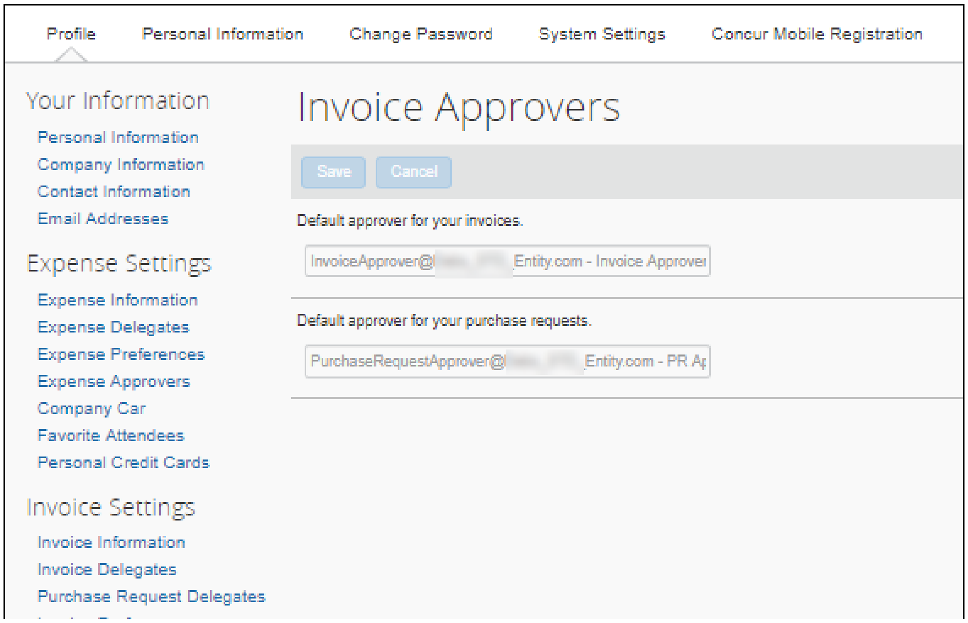
2. In the **User Information** section, select the approver's name in the **Purchase Request Approver** list.



3. Click **Save**.

   Users can view who the default approver for their purchase requests is by clicking **Profile > Profile Settings > Invoice Approvers**.

For users, the **Invoice Approver** page is a read-only page.



EMPLOYEE IMPORT

Clients who want to perform a bulk import of employees can contact SAP Concur to set up an FTP site for overnight imports.

SAP Concur has added selected fields to the Employee Import that let you assign these roles, and set the default PR, Authorized, and COA approvers within the associated field record sets (360, 720, etc.).

The client admin can perform on-demand import of users on the **User Information** page in the **Users** page of Product Settings.

For more information about overnight imports, refer to the *Shared: Employee Import User Guide* and for more information about on-demand imports, refer to the *Shared: Users Setup Guide*.

Section 4: PO Change Orders

Clients who have the purchase request and purchase order functionality enabled can 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 but does not want to create a new purchase order.

Contact SAP Concur to activate this feature.

For more information on how to use this feature, refer to the *Concur Invoice: Purchase Request User Guide for Concur Standard Edition*.