

Concur Invoice: Taxation

Setup Guide for Standard Edition

Last Revised: June 8, 2019

Applies to these SAP Concur solutions:

- ☐ Concur Expense
 - ☐ Professional/Premium edition
 - ☐ Standard edition
- ☐ Concur Travel
 - ☐ Professional/Premium edition
 - ☐ Standard edition
- ☒ Concur Invoice
 - ☐ Professional/Premium edition
 - ☒ Standard edition
- ☐ Concur Request
 - ☐ Professional/Premium edition
 - ☐ Standard edition

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Revision History

Date	Notes/Comments/Changes
August 20, 2022	Minor edits, cover page not updated
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
March 4, 2021	Updated the copyright year; no other changes; cover date not updated
April 22, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 8, 2020	Updated the copyright; no other changes; cover date not updated
June 8, 2019	Updated text and images throughout to reflect UI name change from "Cost Tracking" to "Custom Fields".
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
April 11, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
February 10, 2018	New document.

Taxation

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

For countries that use country packs to track VAT (Canada, UK, Japan, and Australia), Concur Invoice now provides tax codes for clients.

Tax codes can be associated to a relevant set of vendors, and the tax code information will then feed into the client's financial system to make it easier for them to handle and track VAT. Users will see a matching tax code list for each tax amount field when they open an invoice. In the tax code list, they can select which tax code they would like to use.

NOTE: Tax codes are only applicable to invoices and not to purchase requests.

If you are connected to an ERP system, the tax codes in your ERP system will automatically synchronize to SAP Concur once you have connected your ERP to SAP Concur.

NOTE: Tax codes also applies to Capture Processing. For more information, refer to the *Concur Invoice: Capture Processing (Client-Managed) Setup Guide for Standard Edition*.



For more information about country packs, refer to the *Concur Invoice: Country Packs With VAT Client Setup Guide*.

Section 2: End-User Experience

Once the admin has configured the tax codes, the user will see the **VAT Tax Code** list(s) in the **Invoice Details** section of the invoice.

Section 3: Managing Tax Codes

NOTE: If the admin has not configured tax codes, the **VAT Tax Code** list will be blank.

Section 3: Managing Tax Codes

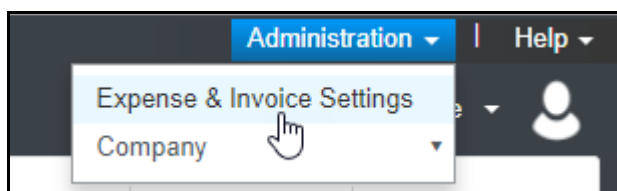
The procedures below detail how to add, edit, and delete tax codes on the **Taxation** page.

NOTE: If you do not see the **VAT Tax Codes for Invoices** link, please contact SAP Concur support and ask them to activate the relevant country pack(s) for your company.

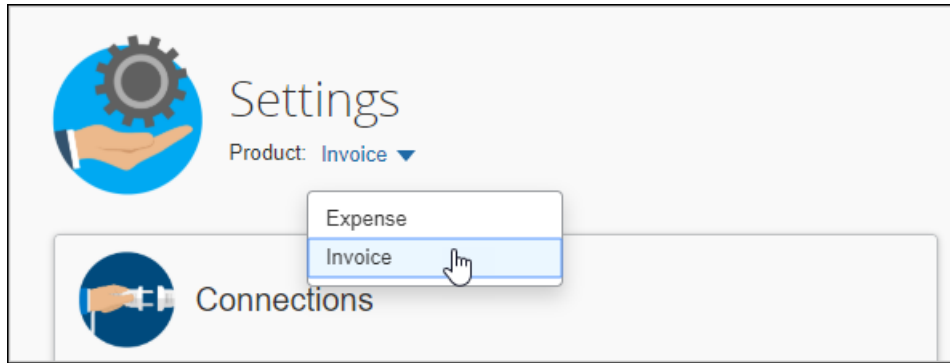
Access Tax Codes

► **To access tax codes:**

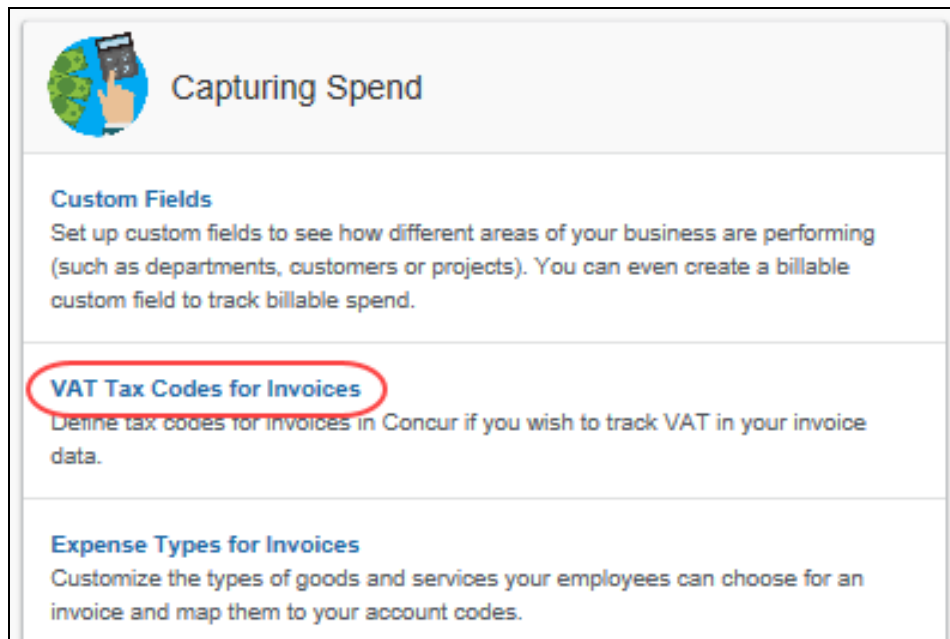
1. Click **Administration > Invoice Settings** or **Expense & Invoice Settings**.



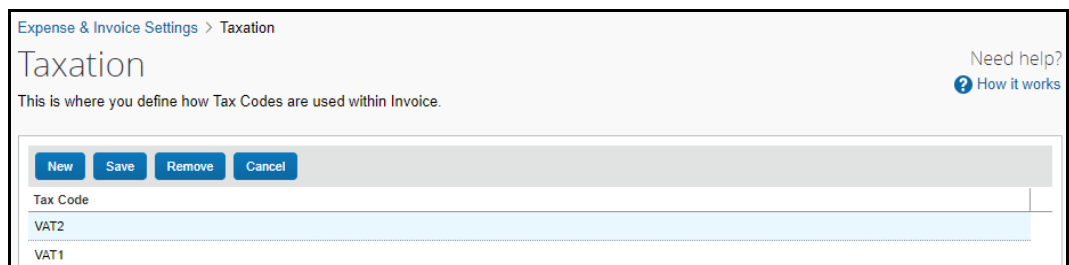
2. In the **Product** list, click *Invoice*.



3. In the **Capturing Spend** section, click **VAT Tax Codes for Invoices**.



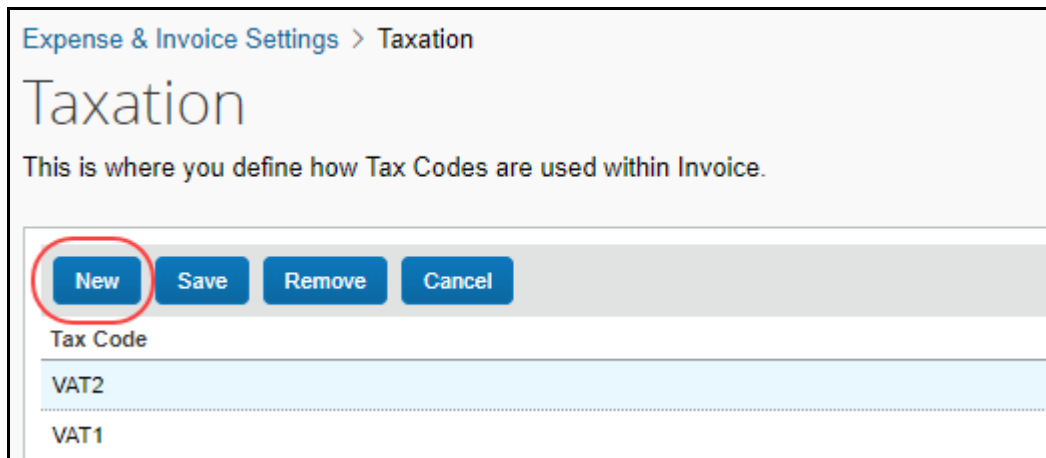
The **Taxation** page appears.



Add a Tax Code

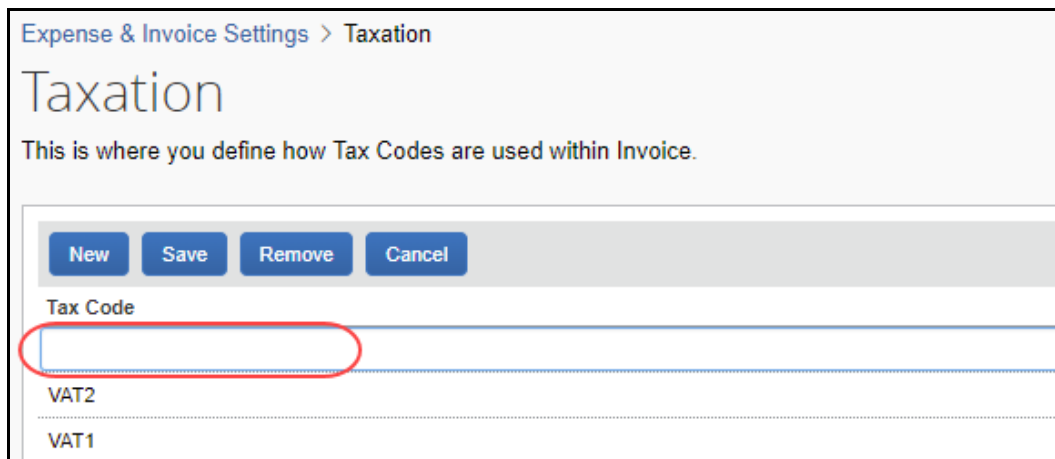
► **To add a tax code:**

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



The screenshot shows the 'Taxation' page under 'Expense & Invoice Settings'. The page title is 'Taxation' and the subtitle is 'This is where you define how Tax Codes are used within Invoice.' Below the subtitle, there is a row of four buttons: 'New', 'Save', 'Remove', and 'Cancel'. The 'New' button is highlighted with a red circle. Below the buttons, there is a 'Tax Code' section with a list of tax codes: 'VAT2' and 'VAT1'.

2. Type the name of the tax code and then click **Save**. The tax code can contain up to 20 characters. The user will now see the **VAT Tax Code** field as a list in the **Invoice Details** section of an opened invoice.



The screenshot shows the 'Taxation' page under 'Expense & Invoice Settings'. The page title is 'Taxation' and the subtitle is 'This is where you define how Tax Codes are used within Invoice.' Below the subtitle, there is a row of four buttons: 'New', 'Save', 'Remove', and 'Cancel'. Below the buttons, there is a 'Tax Code' section with an input field highlighted by a red circle. Below the input field, there is a list of tax codes: 'VAT2' and 'VAT1'.

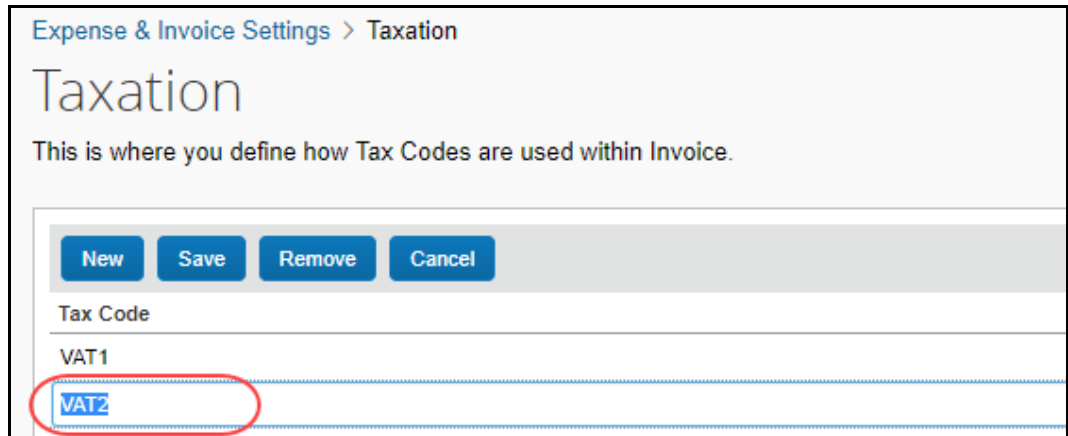
NOTE: The name of the **VAT Tax Code** field will vary depending on the locale of your company.

NOTE: If you have clicked **New** and change your mind and want to remove the empty row that was created, select the empty row and click **Cancel**.

Modify a Tax Code

► **To modify a tax code:**

1. On the **Taxation** page, select one of the tax codes and then type in a new tax code.



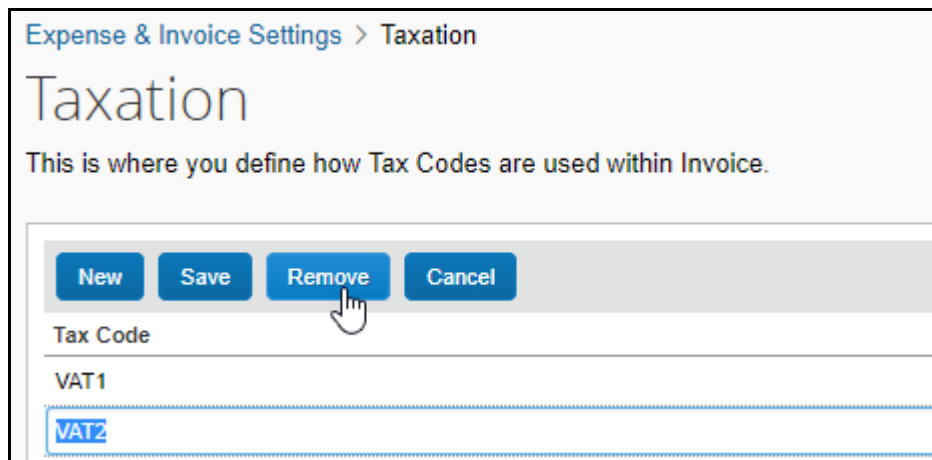
The screenshot shows the 'Taxation' page under 'Expense & Invoice Settings'. The page title is 'Taxation' with a subtitle 'This is where you define how Tax Codes are used within Invoice.' Below the title is a toolbar with four buttons: 'New', 'Save', 'Remove', and 'Cancel'. Under the toolbar, there is a 'Tax Code' label followed by a list of tax codes. The first code is 'VAT1'. The second code is 'VAT2', which is highlighted with a red oval, indicating it is the selected code to be modified.

2. Click **Save**.

Remove a Tax Code

► **To remove a tax code:**

1. On the **Taxation** page, select one of the tax codes and then click **Remove**.



The screenshot shows the 'Taxation' page under 'Expense & Invoice Settings'. The page title is 'Taxation' with a subtitle 'This is where you define how Tax Codes are used within Invoice.' Below the title is a toolbar with four buttons: 'New', 'Save', 'Remove', and 'Cancel'. A hand cursor is pointing at the 'Remove' button. Under the toolbar, there is a 'Tax Code' label followed by a list of tax codes. The first code is 'VAT1'. The second code is 'VAT2', which is highlighted with a blue selection box.

2. Click **Save**.

