Expense: Email Reminders

Setup Guide

Last Revised: July 3 2018

Applies to these SAP Concur solutions:

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

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Revision History

Date	Notes / Comments / Changes
January 4, 2019	Updated the copyright; no other changes; cover date not updated
July 3 2018	The **Copy to Approver** and **Copy to Employee** fields are updated to note that a copy of an email reminder may be sent to an approver or employee
April 4 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
January 4 2018	Updated the copyright; no other changes; cover date not updated
September 5 2017	Added a note that %5% does not apply to approval reminders
December 13 2017 should be: December 13 2016	Added a note regarding enabling rules for items that age and the resulting intentional generation of emails for even very old items Changed copyright and cover
May 13 2016	Updated instances of he/she to they
June 26 2015	Updated the information about the **Display as From** field for email reminders
April 22 2015	Added clarification for the **Copy to Approver** field Replaced the screen samples for the enhanced UI; removed information about the old user interface
March 16 2015	Clarified behavior of Number of Days setting option, and noted that there is a limit of 2,000 characters for the Message Field option
September 24 2014	Added information about two user interfaces; no other content changes.
August 20 2014	Clarified reminders with the frequency of *Once when condition is met*
April 21 2014	Added more definition around the 60-day recurrence of reminders with the frequency of *Once when condition is met*
April 15 2014	Changed copyright and cover; no other content changes
November 19 2013	Added information about email reminders when using custom approval statuses
November 8 2013	User can now draw on a toolbar and helper pane for tokens when writing custom email reminder text
April 3 2013	Removed all references to the *legacy* Authorization Request feature in Concur Expense Changed any references to Concur's Travel Request service to Request, Concur Request, or Authorization Request, depending on the situation
December 28 2012	Made rebranding and/or copyright changes; no content changes
June 22 2012	Addition of new Display as From configurable "From" address in email reminders
March 23 2012	Minor example update - user pending cash in unsubmitted report whose batch is processing in "X" days
February 2012	Changed copyright; no content change

Date	Notes / Comments / Changes
December 31 2010	Updated the copyright and made rebranding changes; no content changes
September 17 2010	Clarified the Frequency setting for Email Reminders
July 16 2010	Added information on Email Reminder Rules in the current user interface, and copying email reminders.
June 18 2010	Added information about new Include Unsubmitted field in Email Reminders
December 11 2009	New document

Email Reminders

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 Concur administrator.

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

Section 2: Overview

The Email Reminders tool is used to manage email messages that can be sent to users to remind them to perform certain actions, such as:

- **Managing receipts:** To remind a user that company policy states that they cannot be reimbursed until the processor receives the receipts for an expense report

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NOTE: These are simply reminders; they do not prevent reimbursement of an expense report. However, the admin can create an audit rule to prevent reports from being submitted without receipt images attached.

- **Approving:** To remind the approver that company policy states that they should approve expense reports or cash advance requests within a certain period of time
- **Using company card transactions in an expense report:** To remind the user that company policy states that they should attach company card transactions to an expense report within a certain period of time
- **Cash advance remaining balances:** To remind the user to associate an outstanding cash advance with an expense report

The Email Reminders tool sends the email to the user based on the time interval defined within the configuration. For example, the email can be sent to the user if the expense report was submitted seven days ago and the receipts have not yet been received.

The admin can configure and localize the subject line and the body of the email.

Section 3: What the User Sees

The user receives an email with the client-configured subject line and message text.

Section 4: Configuration

The configuration steps are described ***briefly*** here and ***in detail*** on the following pages. They are:

- **Step 1 – Create the rule:** Create a rule for the reminder. This step is optional; you can use an existing rule or one of the default rules.
- **Step 2 – Create the email configuration:** Create a new reminder configuration.
- **Step 3 – Schedule the reminders:** Email reminders are run when called from a scheduling process. Once it is scheduled, any email reminder created in the future is sent on that schedule.

NOTE: Scheduling requires the assistance of Concur Client Support.

- **Step 4 – Localization:** If you have already localized the strings within the product and have created a new email message, then you must translate or send the new text to your localization vendor for translation.

NOTE: This process requires the assistance of Concur Client Support to extract the appropriate strings.

Step 1 – Create the Rule

When creating an email reminder configuration, you must choose a rule that defines when that email is sent, so the rules must be available ***before*** creating the reminder. You can use one of the pre-defined rules or you can create your own.

Pre-Defined Rules

The pre-defined rules are as follows:

- **Overdue Receipts:** Expense reports where receipts have not been received within 15 days of submission
- **Overdue Receipt Images:** Expense reports where imaged receipts have not been received within 15 days of submission
- **Overdue Reports:** Expense reports that were created more than 15 days ago and have not been submitted
- **Overdue Expense Report Approvals:** Expense reports that have not been approved within 7 days of submission

- **Overdue Company Card Transactions:** Company card transactions that are not deleted or used within a filed expense report within the date that the transaction enters the system up to and including 30 days

NOTE: If you begin using the Overdue Company Card Transactions rule, or similar reminder for items that age, you will receive notifications for all outstanding items. This exposure of backlogged work, however old, is intentional and expected behavior that facilitates the proper handling of all items.

Reimbursement Currencies and the Exchange Rates Feature

Email reminders ***do not*** use the Exchange Rates feature to convert reimbursement currencies to the currency in the reminder. So, if you create a rule that applies to an amount, then you must include the currency as well as the amount.

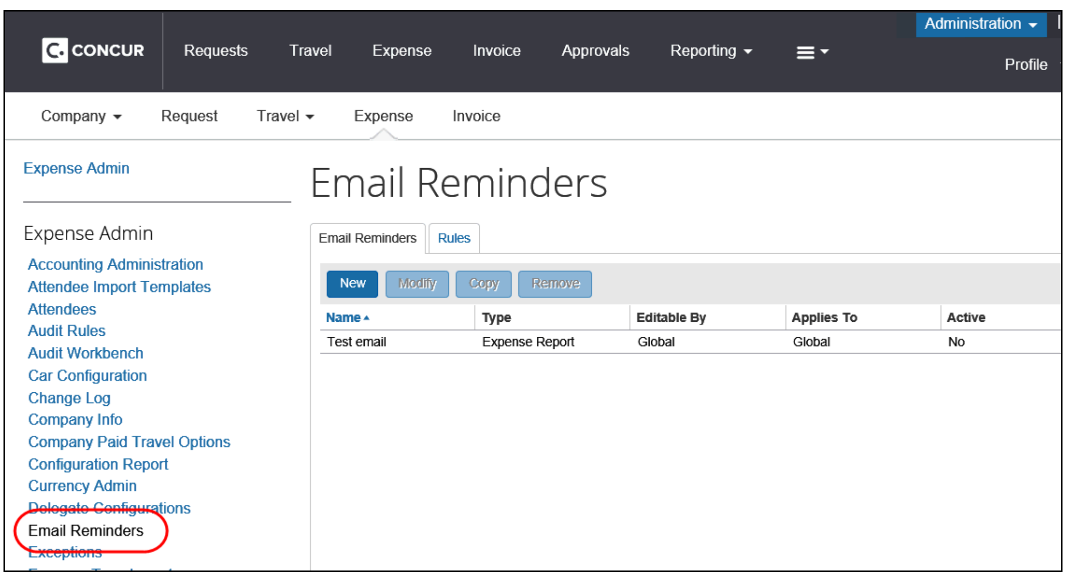
Access the Email Reminders Page

To access Email Reminders:

1. Click **Administration** > **Expense** (on the sub-menu).

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration**.

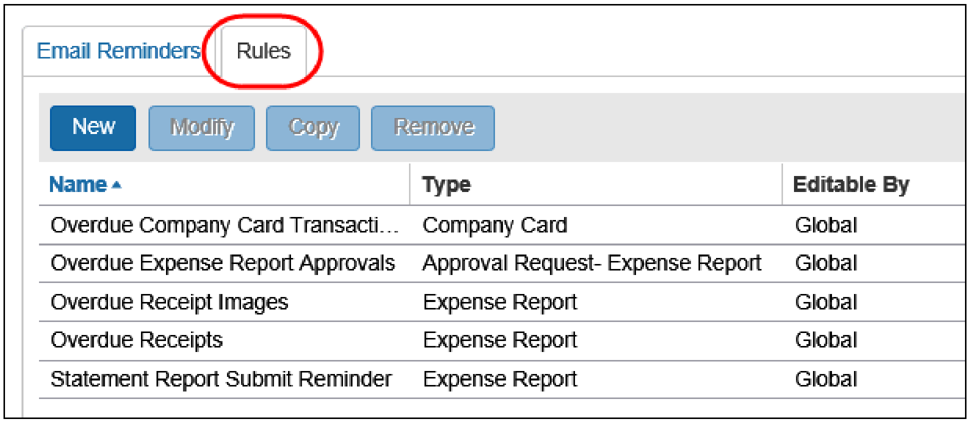
2. Click **Email Reminders** (left menu). The **Email Reminders** page appears.



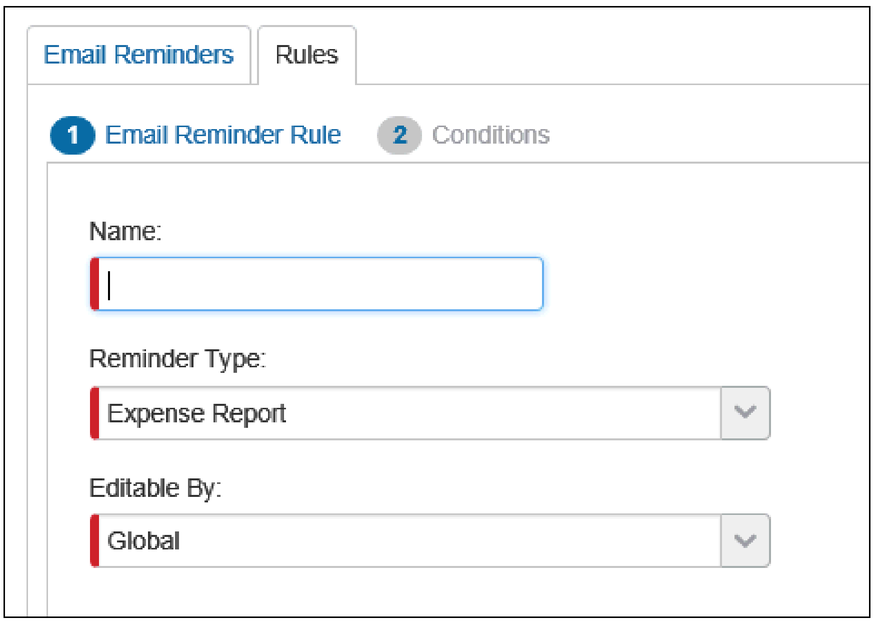
Create Reminder Rules

To create email reminder rules:

1. On the **Email Reminders** page, click the **Rules** tab. The **Rules** page appears.



2. Click **New**. The **Email Reminder Rule** step appears.



3. Complete all required fields.

Field	Description
Name	Type the desired name.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Reminder Type</td><td>Select the desired type.

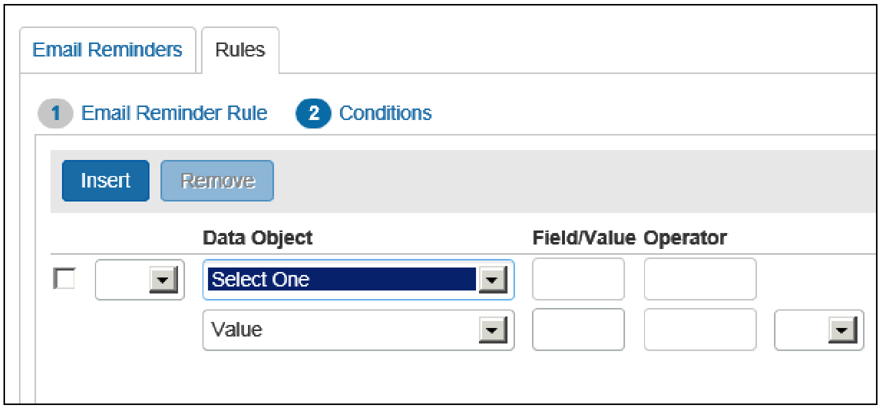
The option you choose here serves as a filter when creating the email reminder. For example, if you create an Expense Reports email reminder, then only the rules with the Expense Reports reminder type are available for you to select. It also serves as a filter in the condition editor.

Click one of the following:
Approval Request - Cash Advance: For cash advance requests with the status of Pending Approval
Approval Request - Expense Report: For expense reports with the status of Pending Approval or Pending Accounting Review

IMPORTANT: This reminder is sent only with the two approval statuses listed above. If you have configured custom approval statuses, refer to Appendix – Special Situations in this guide.
Cash Advance: For cash advances that still have a remaining balance
Company Card: For unused company card transactions
Expense Report (default): For expense reports:
That have not been final processed into an extract file and met receipt requirements
– or –
With Sent back to Employee status</td></tr>
<tr><td>Editable By</td><td>Select the group rights that an administrator must have in order to modify this rule.

Notes the following:
If you select Global, then the rule can be edited or deleted by any employee assigned to administer the Global group.
All other admins assigned at lower levels in the hierarchy can copy this rule, but not edit or delete it.
Depending on your rights, you may not be able to select Global. You are allowed to select only groups below you in the hierarchy.
If you select one or more groups in this field, then the admin must have rights for either group to edit this rule. The admin does not need rights to both groups.</td></tr>
</table>

4. Click **Next**. The **Condition** step appears.



5. Complete the condition for this rule:
    - Click the appropriate data object.
    - Click the field/value from the helper pane.
    - Click the appropriate operator from the helper pane.
    - Click the next appropriate data object.
    - Click the field/value from the helper pane.
    - Continue these steps until the condition is created.

Refer to the *Expense: Audit Rules Setup Guide* for detailed information about the condition editor.

6. Click **Finish**.

Copy Reminder Rules

► *To copy email reminder rules:*

1. On the **Email Reminders** page, click the **Rules** tab.
2. Click the desired rule.
3. Click **Copy**. The **Email Reminder Rule** step appears.
4. Make the necessary changes.
5. Click **Next**. The **Conditions** page appears.
6. Edit the rule as necessary.
7. Click **Done**.

Edit Reminder Rules

▸ ***To edit email reminder rules:***

1. On the **Email Reminders** page, click the **Rules** tab. The **Rules** page appears.
2. Click the desired rule.
3. Click **Modify**. The **Email Reminder Rule** step appears.
4. Make the necessary changes.
5. Click **Next**. The **Conditions** page appears.
6. Edit the rule as necessary.
7. Click **Done**.

Delete Reminder Rules

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

▸ ***To delete email reminder rules:***

1. On the **Email Reminders** page, click the **Rules** tab.
2. Click the desired rule.
3. Click **Remove**.

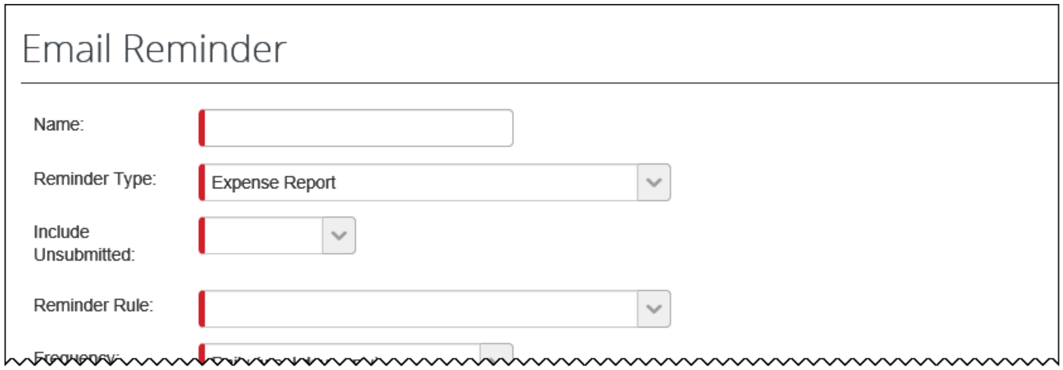
Step 2 – Creating the Email Configuration

A rule must exist before you create an email reminder. You can use the pre-defined rules, use an existing rule, or use one of the default rules.

Create Email Reminders

▸ ***To create email reminders:***

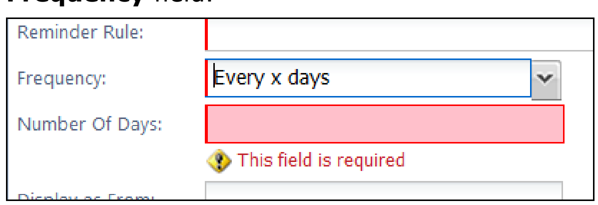
1. On the **Email Reminders** page, on the **Email Reminders** tab, click **New**. The **Email Reminder** window appears.

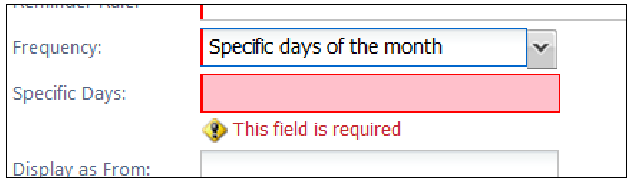


2. Complete all required fields.

Field	Description/Action
Name	Type a unique name for the email reminder.
Reminder Type	Click one of the following: • **Approval Request - Cash Advance:** For cash advance requests with the status of *Pending Approval* • **Approval Request - Expense Report:** For expense reports with the status of *Pending Approval* or *Pending Accounting Review* **IMPORTANT:** The reminder is sent ***only*** with the two approval statuses listed above. If you have configured custom approval statuses, refer to *Appendix – Special Situations* in this guide. • **Cash Advance:** For cash advances that still have a remaining balance • **Company Card:** For unused company card transactions • **Expense Report (default):** For expense reports: ♦ That have not been final processed into an extract file ***and*** met receipt requirements – or – ♦ With *Sent back to Employee* status
Include Unsubmitted	Click *Yes* or *No* to define whether you want this reminder rule to apply to unsubmitted reports.
Reminder Rule	Click the desired reminder rule.

Scroll down to the next section.

Field	Description/Action
Frequency	Indicate how often you want this email to be sent once a rule is violated. Click one of the following: • Daily (weekdays only) • Daily • Every x days • Specific days of the month • Once when condition is met: The reminder is sent only once (in a 60-day period). **NOTE:** To ensure that reminders are sent according to the selected frequency, Concur sets a "flag" whenever a reminder is sent. However, for performance reasons, the flags are removed every 60 days. This means that a "once only" reminder *could* be sent once every 60 days. To prevent recurrence of the reminder, Concur recommends that you add a time- or status-based condition to the reminder rule (for example, add an additional condition on a date field like Create Date ***and*** Within Today minus 59 – or use a Report Status equal to the final workflow step). **NOTE:** When an email reminder is sent, multiple occurrences of the same reminder for the same recipient are grouped together. For example, if an approver has three expense reports overdue for approval, the approver receives only a single email for all three reports rather than three separate reminders.
Number of Days	This field appears ***only*** if you clicked *Every x days* in the **Frequency** field.  Enter the number of days – since the last email reminder – that this email is to be sent. **NOTE:** An email will be sent initially once the condition is met, then every "x days" as specified.

Field	Description/Action
Specific days	This field appears ***only*** if you clicked *Specific days of the month* in the **Frequency** field.  Type a valid integer between 1 and 31. Use **>** for the last day of the month. For example, *10, 20,* > in the field would run the reminder on the 10th, 20th, and last day of the month.
Display as From	Type the name you would like the recipient to see on the notification. The @ symbol is not permitted in this name. **NOTE**: This name affects the display name only and does not affect the underlying email address of EmailReminderService@concursolutions.com
Email Subject	Type the message that will appear as the **Subject** of the email message. There is a maximum of 255 characters. Use the variables available in the Helper pane to make the subject line more dynamic. You must type the actual value, such as %3% in the line rather than select it from the Helper pane. Refer to *Email Message Helper* in this guide.
Email Message	Type the message that appears in the body of the email up to 2,000 characters (double-byte characters are counted as 2 characters). **TIP:** If you are translating this message, be sure the original message translation does not exceed the limit when translated (the German language as a good example). Use the variables available in the Helper pane to make the message more dynamic. You must type the actual value, such as %3% in the line rather than select it from the Helper pane. Refer to *Email Message Helper* in this guide.

Scroll down to the next section.

Field	Description/Action
Copy to Approver	Email reminders to the employee may optionally send a copy of the reminder to the employee's approver. Click *Yes* or *No* to indicate if a copy is to be sent to the approver of the target recipient. The approver used for this is the default approver from the user's profile. **NOTES:** • For credit card reminders, if the user had two default approvers, the reminder is sent ***only*** to the first approver. • For report reminders, a reminder is ***not*** sent to an approver if the report is not submitted.
Copy to Employee	Email reminders to the approver regarding pending approval requests may optionally send a copy of the reminder to the affected employees. Click *Yes* or *No* to indicate if a copy is to be sent to the employee represented in the item pending approval. **IMPORTANT: Use caution with this option.** If multiple items are pending the approver, each one will be listed in the email reminder. The relevant employees will all be added as cc recipients of the email to the approver, and thus will view information about items from other employees that might not be appropriate visibility.
Copy to Email Address	Type the appropriate email address. Separate multiple email addresses with a comma or a semicolon.

Field	Description/Action
Editable By	Select the group rights that an admin must have in order to modify this reminder. Note the following: • If you select *Global*, then the reminder can be edited or deleted by any employee assigned to administer the Global group. • All other admins assigned at lower levels in the hierarchy can copy this reminder, but not edit or delete it. • Depending on your rights, you may not be able to select *Global*. You are allowed to select only groups below you in the hierarchy. • If you select one or more groups in this field, then the admin must have rights for either group to edit this rule. The admin does not need rights to both groups.
Applies to	Select the groups that will be able to see this reminder. Only the groups that you select will have this reminder available to them; the groups below the selected groups (in the hierarchy) do not have this reminder available.
Active	Click *Yes* to make this email reminder active.

3. Click **OK**. The **Email Reminders List** page appears and the reminder you just created appears in the list.

Use the Email Message Helper

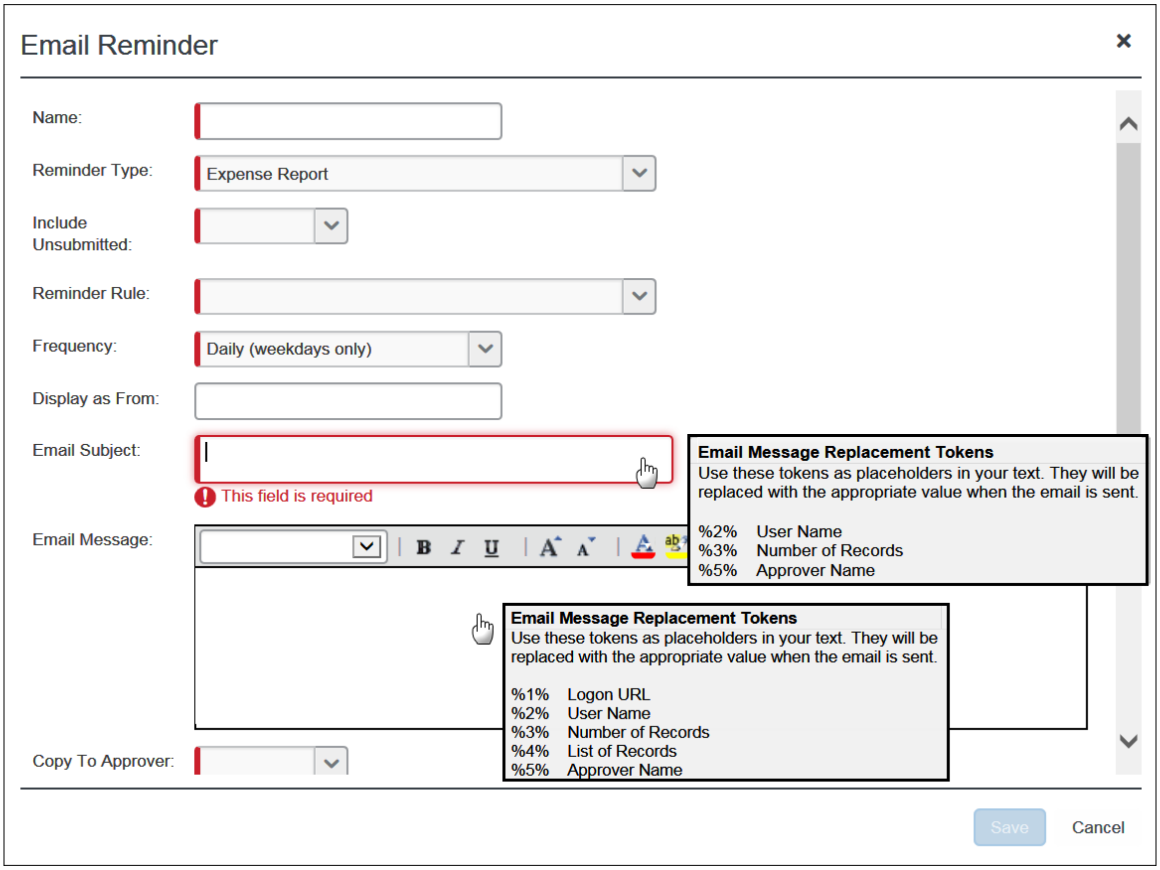
When creating an email message for a reminder, you can add dynamic text to the subject line and the email message body text. When you click in the **Email Subject** and **Email Message** fields, a helper pane appears to display the options you have available.

Note the following:

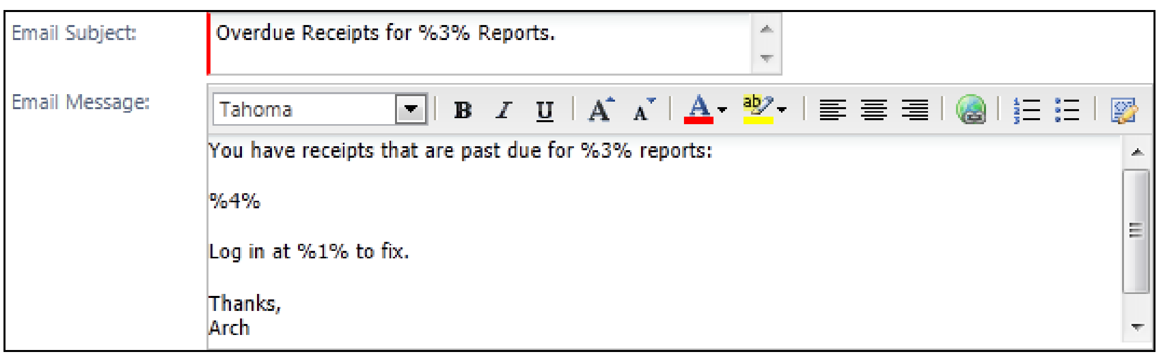
- The options are not clickable. You must type the variable into the field.
- Not all tokens apply to all reminder types. The table below provides the details.

SUBJECT HELPER AND MESSAGE HELPER

When the user clicks a field, the helper appears.



Sample:



Variable	Label Name	Description	Applies to
%1%	Logon URL	URL for the Concur **Login** page	Subject helper: None Message helper: All
%2%	User Name	Primary recipient of the email in this format: Firstname Lastname This does not pertain to any Copy To recipients, such as approvers.	Subject helper: All Message helper: All

Variable	Label Name	Description	Applies to
%3%	Number of Records	The number of applicable object records, such as number of expense reports or number of cash advance requests, found by the reminder rule.	Subject helper: All Message helper: All
%4%	List of Records	A list of the applicable records found by the reminder rule, based on pre-defined formats. Refer to the *Examples of List of Records* section below for examples. **NOTE:** These lists will be preceded and followed by a blank line in the email body when inserted by the system.	Subject helper: None Message helper: All
%5%	Approver Name	Approver of the person receiving the email in this format: Firstname Lastname	Subject helper: • Cash Advance • Expense Report Message helper: • Cash Advance • Expense Report

EXAMPLES OF LIST OF RECORDS

The List of Records variable (allowed only in the **Email Message** field) displays different information depending on the email reminder type. Examples of the type of data are outlined below.

For the Approval Request – Expense Report reminder type:

Date	Report Name	Report Total	Employee Name
09-23-2003	Trip to Portland	500.00	John Smith
11-15-2003	Trip to Seattle	250.00	Terry Traveler

For the Cash Advances reminder type; the available balance is not displayed for cash advance approvals:

Issue Date	Cash Advance Name	Starting Balance	Available Balance
09-23-2003	Name One	500.00	200.00
11-15-2003	Name Two	250.00	100.00

For the Company Card reminder type:

Date	Expense Type	Vendor	Amount
09-15-2003	Airfare	American Airlines	345.67
10-11-2003	Lodging	Marriott Hotels	865.48

For the Expense Reports reminder type:

Date	Report Name	Report Total
09-23-2003	Trip to Portland	500.00
11-15-2003	Trip to Seattle	250.00

Modify Email Reminders

To modify an email reminder:

1. On the **Email Reminders** page, click the desired reminder.
2. Click **Modify**. The **Email Reminder** page appears.
3. Edit the appropriate fields.
4. Click **Save**.

Copy Email Reminders

To copy an email reminder:

1. On the **Email Reminders** page, click the desired reminder.
2. Click **Copy**.
3. Make any necessary changes.
4. Click **Save**.

Remove Email Reminders

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

To remove an email reminder:

5. On the **Email Reminders** page, click the desired reminder.
6. Click **Remove**.

Step 3 – Schedule Email Reminders

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

If this is the first time creating email reminder configurations, then you must set up the schedule to run the email reminders. Contact Concur Client Support for assistance.

Step 4 – Localize Email Reminder Text

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

Depending on your company's implementation of Expense, you may have to submit a case to Concur Client Support for assistance with extracting the strings.

Best Practices When Localizing Subject and Email Message Fields

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

Section 5: Appendix – Special Situations

Approval Request – Expense Report Reminder Type and Custom Approval Statuses

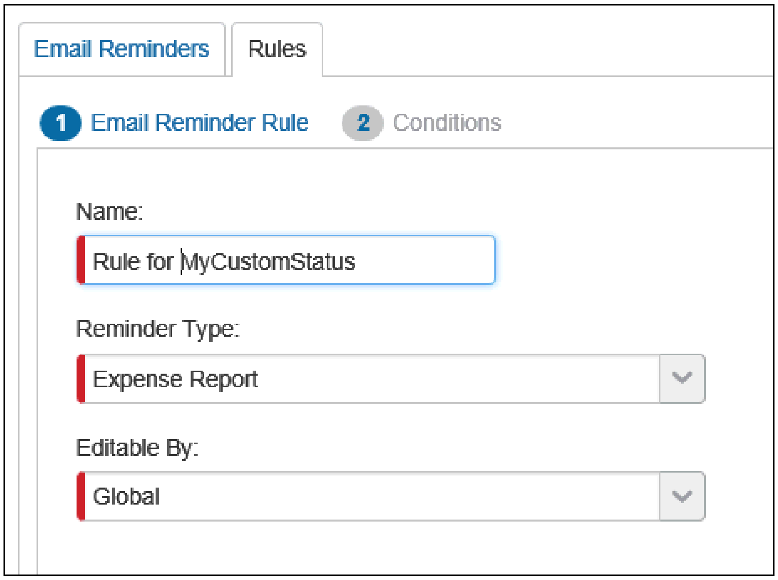
When using the Approval Request – Expense Report reminder type, be aware that the email is sent ***only*** for these two statuses: *Pending Approval* and *Pending Accounting Review*.

If you have configured custom approval statuses and if you want to use approval email reminders, complete these steps.

Step 1 – Create a New Rule

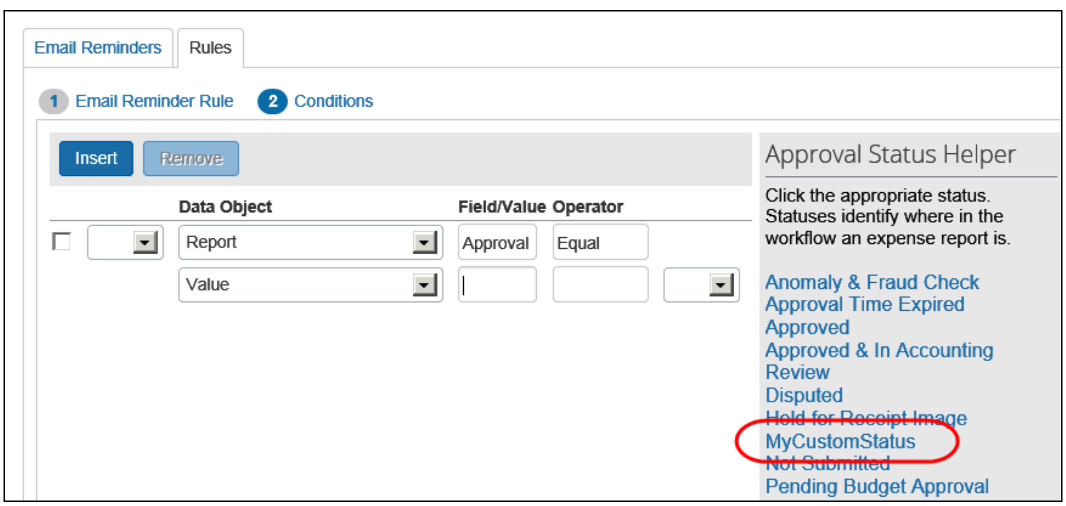
To create a reminder rule:

1. On the **Rules** tab, on the **Email Reminder Rule** step:



- In the **Reminder Type** list, click *Expense Report*.
- Complete all other fields as usual.

2. On the **Condition** step:

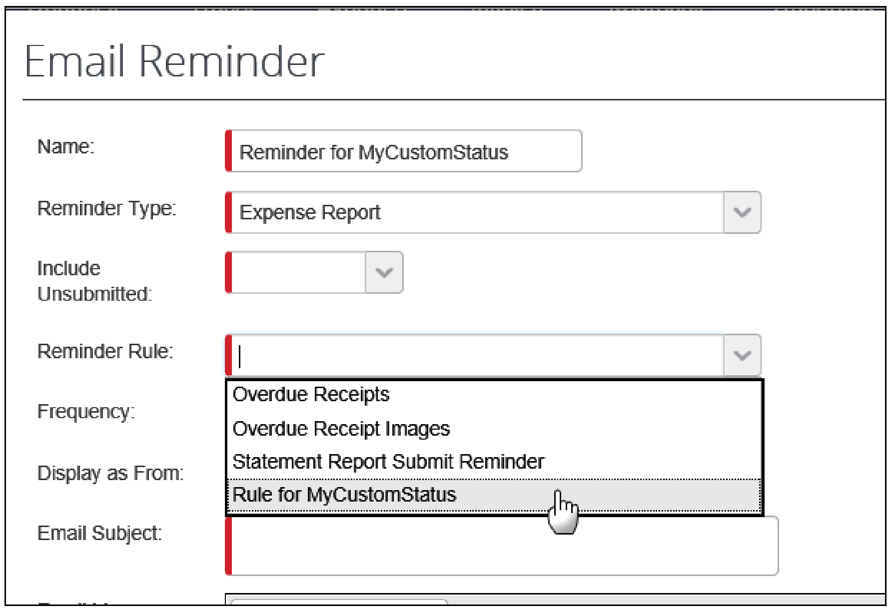


- In the **Data Object** field, click *Report*.
- In the **Field/Value** field, click *Approval Status*.
- In the **Operator** field, click *Equal*.
- In the **Field/Value** field, click your custom status.

Step 2 – Configure the Email Reminder

To create the email reminder:

1. On the **Email Reminders** tab, click **New**.
2. In the **Email Reminder** window:



- In the **Reminder Rule** list, click your new reminder rule.
- In the **Copy to Approver** list, click *Yes*.

NOTE: This will send the email reminder to both the employee ***and*** the approver. There is no option available to send a custom status reminder ***only*** to the approver.

- Complete all other fields as usual.

Step 3 – Schedule Email Reminders and Step 4 – Localize Email Reminder Text

Follow the normal process for these steps.