

# **Concur Expense: Fleet/Fuel Card**

## **Setup Guide**

**Last Revised: August 24 2015**

Applies to these SAP Concur solutions:

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



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## Revision History

Date	Notes / Comments / Changes
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
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December 9 2016	Updated the guide content to new corporate style; no content changes.
May 13 2016	Updated instances of he/she to they.
August 24 2015	Initial publication

# Fleet/Fuel Card

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**NOTE:** Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

## Section 1: Permissions

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

If a company administrator needs to use this feature and does not have the proper permissions, they should contact the company's 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

For clients who use the WEX Fleet Card (formerly the Wright Express Universal Fleet Card) – Concur provides processing for its fleet/fuel card transactions.

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**NOTE:** This service is currently available **only** to clients who use the WEX Fleet Card. The client must be on WEX's Millennium platform and utilize CCN. As of March 2015, only WEX-direct programs qualify; their co-branded solutions do not. Additional fleet card programs will be available in the future.

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## Deployment Types

There are three ways that a client can deploy a fleet/fuel card program:

- **Driver card:** Card assigned to a specific driver, to be used for all fleet/fuel transactions incurred by that driver in any vehicle

The card charges are assigned directly to the driver, who can manage the charges just like any other company/purchasing card.

- **Vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver

For these accounts, the driver must enter their driver ID at the pump or point-of-sale. Concur will import the card charges and – using the driver ID – route them to the appropriate Concur user (driver). The user can manage the charges just like any other company/purchasing card.

- **Managed vehicle card:** Card assigned to a specific vehicle, to be used for all fleet/fuel transactions incurred for that vehicle by any driver but all transactions are managed by a single client-defined driver/employee

The card charges are assigned directly to the employee, who can manage the charges just like any other company/purchasing card.

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**NOTE:** Clients can use more than one deployment type. Each deployment type requires a separate card feed and card job definition.

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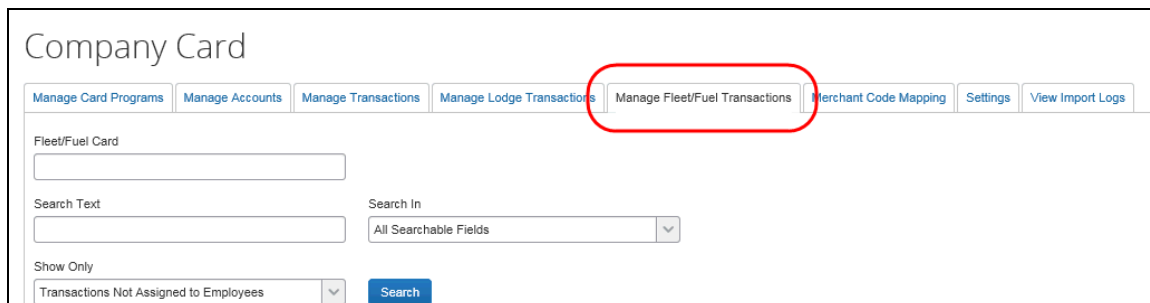
## More About the Driver ID

### *Vehicle Card*

If the client uses the *Vehicle card* deployment type, then Concur requires the driver ID in the Concur profile for any user who will be driving the corporate vehicle.

When Concur receives the card charge from the vendor, Concur compares the driver ID entered at the pump to the driver ID in Profile. The charge then appears with that user's card charges.

If the driver ID associated with the charge does not match a driver ID in Profile, the transaction is orphaned. The job run details will display a warning detailing the presence of orphaned transactions. The client's Company Card admin must manually assign the transaction to the user using the **Manage Fleet/Fuel Transactions** tab.

The screenshot shows the 'Company Card' management interface. At the top, there is a horizontal navigation bar with several tabs: 'Manage Card Programs', 'Manage Accounts', 'Manage Transactions', 'Manage Lodge Transactions', 'Manage Fleet/Fuel Transactions', 'Merchant Code Mapping', 'Settings', and 'View Import Logs'. The 'Manage Fleet/Fuel Transactions' tab is highlighted with a red circle. Below the navigation bar, there is a section for 'Fleet/Fuel Card' with a text input field. Below that is a 'Search Text' input field and a 'Search In' dropdown menu currently set to 'All Searchable Fields'. At the bottom left, there is a 'Show Only' dropdown menu set to 'Transactions Not Assigned to Employees'. A blue 'Search' button is located at the bottom right of the search section.

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**NOTE:** The **Manage Fleet/Fuel Transactions** tab appears *only* for clients using the *Vehicle card* deployment type since this is the only type that is likely to have orphaned transactions.

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### *Best Practice for Driver ID*

If the client uses the *Vehicle card* deployment method, then the driver ID is required in the user's profile. If the client uses the *Driver card* or *Managed vehicle card* deployment method, it is not required but it is best practice to include the driver ID in the user's profile.

### ***Driver Card or Managed Vehicle Card***

If the client uses the *Driver card* or *Managed vehicle card* deployment type **and** if the client includes the driver ID in the WEX feed, then Concur attempts to automatically assign the fleet/fuel card to the employee using the driver ID provided in the WEX feed.

If the driver ID is not available within Concur or in the WEX feed, the client's Company Card admin must manually assign the card so that the transactions will be seen by the driver/employee. Fleet/Fuel accounts can be manually assigned using the **Manage Accounts** tab, via the 650 record in the scheduled (overnight) employee import, or via the **Credit Card Information** template of the on-demand (spreadsheet) import in User Administration.

The Company Card admin can also manually create Fleet/Fuel cards using the **Manage Accounts** tab, specifying *Fleet/Fuel* as the account type.

The screenshot displays the 'Company Card' management interface. The 'Manage Accounts' tab is highlighted with a red circle. A modal window titled 'Create New Card Account' is open, showing the following fields:

- Centrally Reconciled: ☐
- Account Type: **Individual** (dropdown menu)
- Name on Card: Individual
- Payment Type: Diversion
- Account Number: **Fleet/Fuel** (dropdown menu, with a hand cursor pointing to it)
- Clearing Account Code: Enter Clearing Account Code
- Effective Date: Select Effective Date
- Card Icon: Select One ..
- Card Program Name: None

At the bottom of the modal are three buttons: 'Save and Assign', 'Save', and 'Cancel'.

## **Section 3: Configuration**

### **Client Steps – Getting Started**

The client contacts Concur Client Support and:

- Asks for the WEX Fleet Card feed setup
- Tells Concur how fleet/fuel cards will be deployed in the client's business, which will be one of these:
  - ◆ Driver card
  - ◆ Vehicle card
  - ◆ Managed vehicle card

- For the *Vehicle card* deployment, the **Driver ID** field **must** be added to the employee form(s) used by **all** users who will be driving the corporate vehicle.

For the *Driver card* or *Managed vehicle card* deployment, the **Driver ID** field **should** (best practice) be added to the employee form(s) used by **all** users who will be driving the corporate vehicle.

The client:

- ♦ Indicates to Concur which employee form(s) must be modified to add the **Driver ID** field
- ♦ Defines who can modify the **Driver ID** field – users, administrators, etc.

**Best Practice:** The client may want to restrict access to the User admin.

## Concur Steps – Feed Setup

### ► To enable:

1. Concur Client Support creates a feed request, as usual, and additionally includes the deployment type.
2. Concur works with the vendor to get the feed. Once the file name is received by Concur, the file mover is established to stage the file for processing for the client.
3. Concur enables the **Use Fleet/Fuel Cards?** option in **Settings** in the HMC tool.
4. Concur creates the card job to process the feed. On the **Add Import Definition** page:
  - ♦ In the **Import Definition File** list, the admin selects *Wright Express Fleet/Fuel Card*.

Import Definition File: Wright Express Fleet/Fuel Card

Card Type: Select One

Payment Type Key: IBCP

Card Icon To Display: Select One

File Prefixes:

Allow use of value-added tax from the card transaction: ☐

Import billing address information when available: ☒

Email Notification on Success: ☒

Fleet/Fuel Card Configuration:

- No fleet/fuel cards are included
- Fleet/Fuel cards are deployed to vehicles and expensed by a single vehicle owner
- Fleet/Fuel cards are deployed to vehicles and expensed by each driver of the vehicle
- Fleet/Fuel cards are deployed to drivers

Company Policy



- ◆ In the **Fleet/Fuel Card Configuration** list, the admin selects one of these:
  - Fleet/Fuel cards are deployed to vehicles and expensed by a single vehicle owner
  - Fleet/Fuel cards are deployed to vehicles and expensed each driver of the vehicle
  - Fleet/Fuel cards are deployed to drivers

## Concur Steps – Forms and Fields

As part of the initial request, the client indicated which of the employee forms must be modified in order to add the **Driver ID** field. Then, Concur adds the field, as usual, to the affected employee forms(s).

Forms and Fields

Form Type: Employee

Forms | Form Fields | Fields | Connected Lists | Conditional Fields | Validations

Modify Form Fields | Remove Form Fields | Add Fields

Form Field Name

Default Employee Information

- Employee First Name
- Employee Last Name
- Middle Initial
- Employee ID
- Is Non Employee
- Logon ID
- Email Address
- Locale
- Country of Residence
- State/Province
- Ledger
- Reimbursement Currency
- Cash Advance Account Code
- Active
- Is a Test User?
- Org Unit 1-Division

Add Fields to Forms

Field Name	Site Requir...	Data Type	Status
Custom 13-CES Reserved	No	Text	Inactive
Custom 14-Phone Number	No	Text	Active
Custom 15-CVAS User	No	Boolean	Active
Custom 16-Audit Group	No	Text	Active
Custom 17-Vendor ID	No	Text	Active
Custom 18-Deduction Code	No	Text	Active
Custom 20-Payroll Company Code	No	Text	Active
Custom 21	No	Text	Active
Custom 22	No	Text	Active
Default Travel Agency	No	Integer	Active
Driver ID	No	Text	Active
Expense Audit Required	No	Text	Active
Middle Name	No	Text	Active

Add Fields Cancel

When done, Concur follows the normal steps to notify the client that the field has been added and is now available.

## Client Steps – Finishing Up

In User Administration, the client can:

- Locate the individual users and manually add the driver ID.  
– or –
- Click **Import Users** and import the driver IDs via the on-demand (spreadsheet) import.

## Section 3: Configuration

