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
January 7, 2021	Updated the copyright; added Concur to the cover page title; cover date not updated
April 9, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 2, 2020	Updated the copyright; no other changes; cover date not updated
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January 5 2018	Updated the copyright; no other changes; cover date not updated
December 14 2016	Changed copyright and cover; no other content changes.
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

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.

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.

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.

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

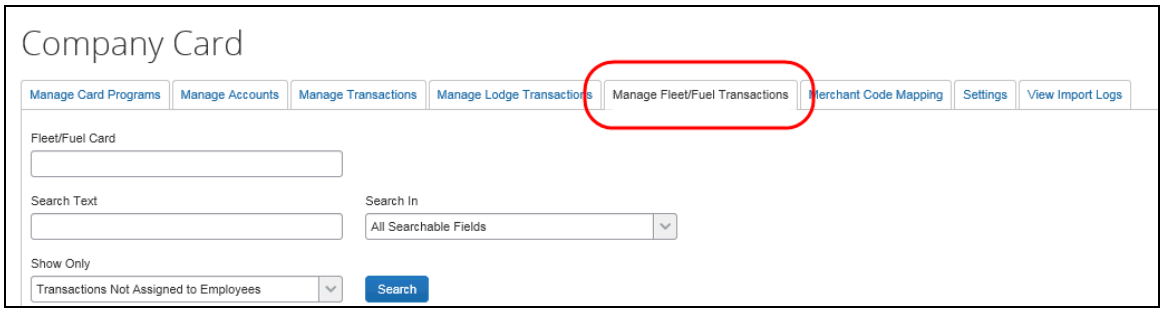
More About the Driver ID

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.



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.

Best Practice for Driver ID

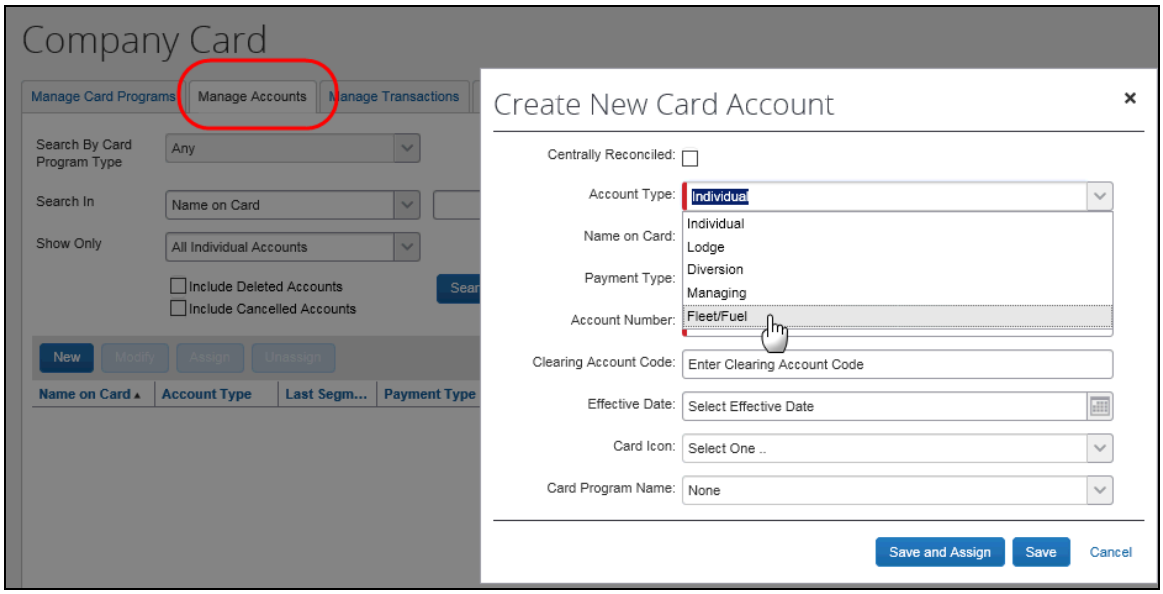
If the client uses the *Vehicle card* deployment method, then the driver ID is required in the user's profile. If the client uses the *Driver card* or *Managed vehicle card* deployment method, it is not required but it is best practice to include the driver ID in the user's profile.

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.



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:

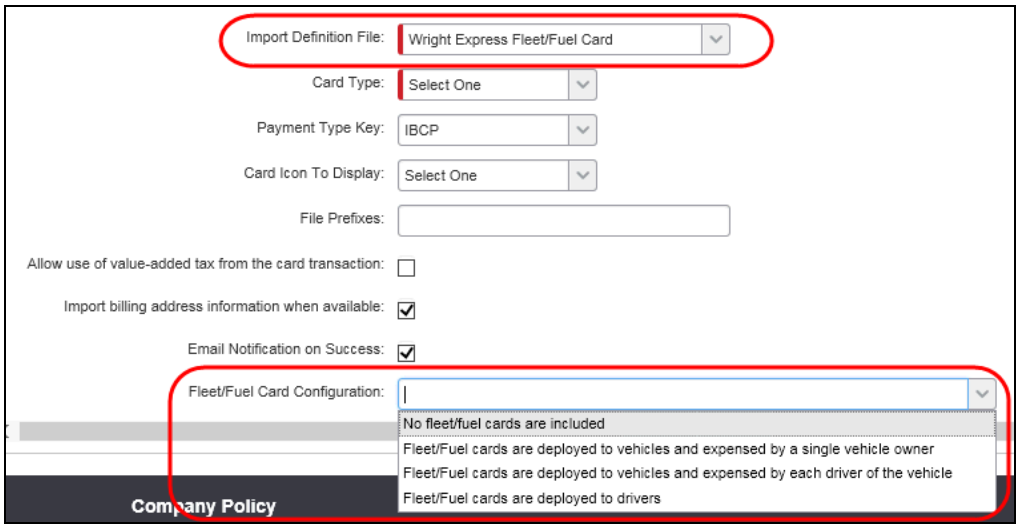
1. Concur Client Support creates a feed request, as usual, and additionally includes the deployment type.

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:

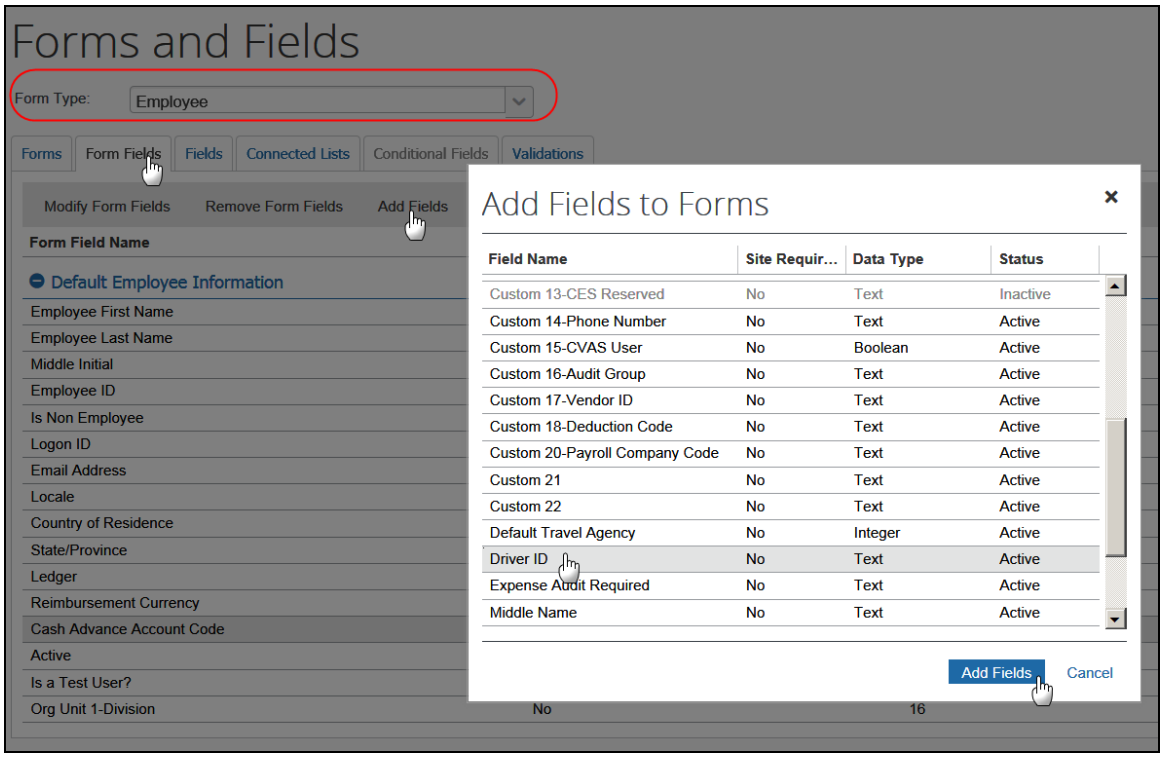
   - In the **Import Definition File** list, the admin selects *Wright Express Fleet/Fuel Card*.



- 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).



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.