

Shared: Concur Salesforce Connector

Setup Guide

Last Revised: August 2, 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
- ☐ Request
 - ☐ Professional/Premium edition
 - ☐ Standard edition

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Revision History

Date	Notes/Comments/Changes
September 17, 2022	Minor edits.
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
April 15, 2021	Updated the copyright year; no other changes; cover date not updated
April 27, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 15, 2020	Updated the copyright; no other changes; cover date not updated
February 11, 2019	Updated the copyright; no other changes; cover date not updated
August 2, 2018	Updated the following information: The Concur Salesforce Connector does not have the concept of delegates, so it is not possible to access Concur data as a delegate from within Salesforce. However, a Concur Expense user can act as a delegate and access the Salesforce data elements (such as account, opportunity, attendees, and so on) associated with the user they are delegating for, when logged into Concur Expense directly.
April 16, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
February 10 2018	Added updated screenshots for the support of Salesforce Lightning. NOTE: This setup guide is targeted to new clients and aims to reflect the newest version of Salesforce, Lightning, that is currently supported by the Concur Salesforce Connector.
June 3 2017	Professional and Group have been removed from the list of Salesforce editions that support the Concur Salesforce Connector.
February 17 2017	Added new <i>Troubleshooting</i> section, <i>Error in Cost Object Tracking – Query Cannot be Dynamically Created</i> .
December 14 2016	Changed copyright and cover; no other content changes.
September 9 2016	Added new section, <i>Filtering Cost Object Lists That Displayed in Concur</i> .
July 21 2016	Updated the procedure, <i>To add objects to cost tracking</i> , to include new search fields.
November 13 2015	Updated the section <i>Application Connector Update</i> to mention that before Concur can fetch Salesforce Attendees, they must already be configured in Expense as described in the section <i>Attendees from Salesforce Configuration</i> .
June 25 2015	Updated the Connector Package Installation procedure.
June 4 2015	Removed the Salesforce User Account Information procedure. Updated the Application Connector Update procedure.
May 15 2015	Updated the screen shots to the enhanced UI Added Cost Tracking Configuration in Salesforce Must be Updated section
January 16 2015	Updated the Salesforce Objects Not Available for Cost Tracking.

Date	Notes/Comments/Changes
December 3 2014	Added information about new object search filter on the Concur Connector Admin Tools and Cost Object Tracking pages, and added search information in the Salesforce Attendees section.
November 14 2014	Added a note stating that Concur does not save Attendee expense details in Salesforce and that Concur saves only the expense data for those objects configured when setting up Cost Tracking.
October 10 2014	Added information about the two user interfaces; no other content changes
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May 16 2014	Expanded information on Track Expense Cost Object by any Salesforce Object feature.
April 11 2014	Clarified the Configuring Cost Tracking information and added troubleshooting information.
March 31 2014	Added information on Search Attendees by any Salesforce Object Field feature.
March 7 2014	Expanded information about the Track Expense Cost Object by any Salesforce Object feature.
January 23 2014	Cover and copyright changes; no other content changes
October 4 2013	Added information about new Track Expense Cost Object by any Salesforce Object feature.
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July 11 2013	Restored the application connector update process in Setup.
July 10 2013	Updated the Connector Configuration Process information.
June 28 2013	Added information about using the connector with multiple Salesforce organizations.
January 18 2012	Added known Opportunity issue, and uninstall information.
December 28 2012	Made rebranding and/or copyright changes; no content changes
December 14 2012	Added information about controlling user access.
November 16 2012	Updated What the User Sees section.
November 1 2012	Updated Prerequisites.
October 26 2012	Updated Connector update information.
October 23 2012	Updated SSO information.
October 19 2012	Added more information about the reporting objects.
September 11 2012	Added steps to configure the Allocation field, information about the Concur Connector Admin Tools page, and clarified User Profile information.
September 6 2012	Added steps to update SSO key.
July 23 2012	Updated user profile information.

Concur Salesforce Connector

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 Expense administrator.

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

Section 2: Overview

The Concur Salesforce Connector provides a method of integrating Salesforce data with Concur Expense. The Concur Salesforce Connector is a managed package built on the Force.com platform that can be installed into an existing Concur Expense client's Salesforce organization(s). After a quick setup process, the connector allows the client's users to share data and functionality between Salesforce and Concur Expense.

Multiple Salesforce Organization Functionality

If a client has more than one Salesforce organization, they can use the Concur Salesforce Connector in each organization and connect them all to a single Concur Expense company. The administrator for each organization must install the connector in their organization in order for their users to have access to it. The administrator for the first organization completes the Concur Expense configuration steps, which enables the Concur Expense company to work with the connector. Each subsequent organization administrator installs the connector package in their organization but does not need to complete the Concur Expense configuration process.

The end users are prompted to connect their Concur Expense account to their Salesforce account the first time they try to use the connector features. The Salesforce account that they use during this process determines which organization's contacts and opportunities they have access to. After the user connects their Concur Expense account to their Salesforce account, Concur Expense saves this information and does not ask the user again.

Clients who are upgrading from a previous version of the connector and would like to start using the connector with multiple organizations must upgrade their existing organization first. Once they have installed the new connector package in their original organization, they can install the package in additional organizations.

The organizations should all be kept at the same connector version. Clients who are using the connector in multiple organizations and would like to upgrade should make sure that all of their organizations are on the same connector version prior to upgrading. If an organization has an older version of the connector than the rest of the organizations, it should be upgraded to match the other orgs before the latest connector is installed in any of the orgs.

Features

The connector presently works with Concur Expense (Standard/Professional/Premium). The connector allows Concur Expense users to:

- Access their current trips from within Salesforce.
- View their current expense reports, card charges and expense report approvals.
- SSO to Concur Expense to manage expense reports, card charges and expense report approvals.
- Share their Travel itineraries with coworkers using Chatter.
- Follow other user's Travel updates using Chatter.
- Bring attendee information into Concur Expense from Salesforce, and associate it to their expenses, using the Search for Attendees in Salesforce feature.
- Associate their expenses with any Salesforce object, using the Track Expense Cost Object by any Salesforce Object feature.

Search for Attendees in Salesforce

Expense users can search in Salesforce for attendees to associate with their expenses in Concur Expense. The Salesforce and Concur Expense administrators can configure the attendee search page to work with any Salesforce object, and map the Expense attendee fields to the Salesforce object fields. The most commonly used Salesforce object is Contact, however any Salesforce object can be used as the basis for attendees. When the user selects an attendee to add to the expense, the mapped object field information in Salesforce is saved in Concur Expense.

NOTE: The user's access to the Salesforce objects is controlled in Salesforce. They must have read access to the object in Salesforce to search using the object's fields.

The configuration process requires both the Concur Expense and Salesforce administrators, and has the following steps:

1. The Concur Expense and Salesforce administrators determine which object fields the users should be using when searching for and assigning attendees to their expenses. Salesforce object fields with the following types can be used: Text (aka String), Email, Picklist.



For more information, refer to the *Choosing Salesforce Attendee Search Fields* section of this guide.

2. The Concur Expense administrator configures the attendee search page form to include Expense fields that correspond to the object fields, then creates a new attendee type to use with the connector that utilizes the form.



For more information, refer to the *Attendees from Salesforce Configuration* section of this guide.

3. The Salesforce administrator maps the Expense fields on the attendee search page with the Salesforce object fields.



For more information, refer to the *Configuring Attendee Search Fields* section of this guide.

NOTES FOR UPGRADING CLIENTS

Clients who were using the previous Salesforce Contacts functionality can continue to use it without taking the steps included in this section. If they want to use the expanded functionality, they can modify their existing attendee type using the steps above.

Track Expense Cost Object by any Salesforce Object

In Concur Expense a cost object is a business object that a company wants to use to track expenses. It can be anything a company finds important to their business, for cost tracking.

Cost objects can be simple, such as a single business object like Department, or connected, meaning there are two or more objects connected in a hierarchy such as Event-Product-Cost Center.

Concur Expense users can associate their expenses to one or more cost objects. Concur Expense keeps track of all expenses for all users for each cost object. These are aggregated into total cost for paid and unpaid expenses.

The Track Expense Cost Object by any Salesforce Object feature allows Salesforce administrators to select one or more Salesforce objects to be Concur Expense cost objects. The administrator can configure multiple Expense cost object/Salesforce object mappings.

ONE TO THREE LEVELS

On the **Cost Tracking Configuration** tab, Salesforce administrators can configure their cost objects. For each cost object, they select the Salesforce objects that they

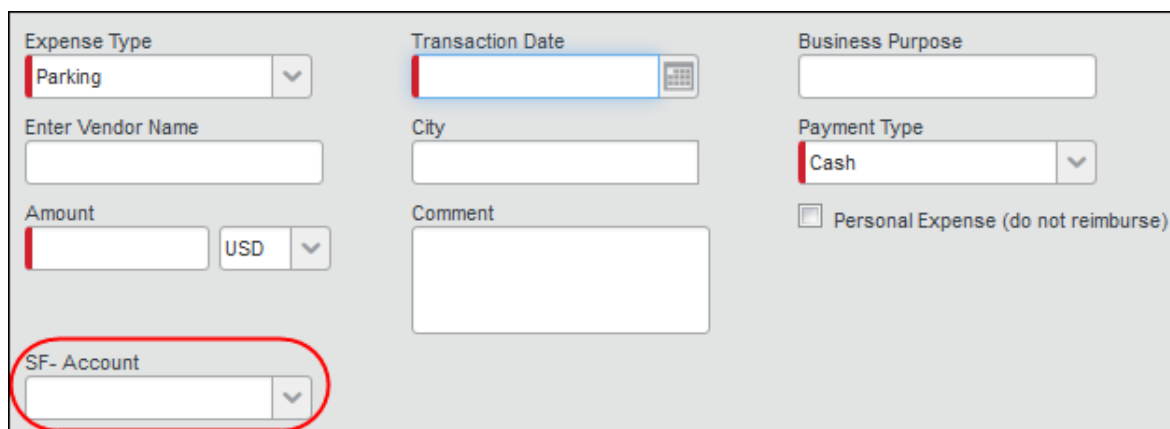
would like Concur Expense users to track expenses against. The administrator can select:

- A single Salesforce object for a simple Expense cost object
-or-
- Multiple Salesforce objects (up to three) for Expense connected list cost objects

The administrator can configure as many cost objects as necessary, and can utilize both cost objects connected to a single Salesforce object and cost objects connected to multiple Salesforce objects at the same time.

One Salesforce Object

If the administrator selects a single Salesforce object to track, the connector will create a single-level list in Expense, which is associated to a simple list field:

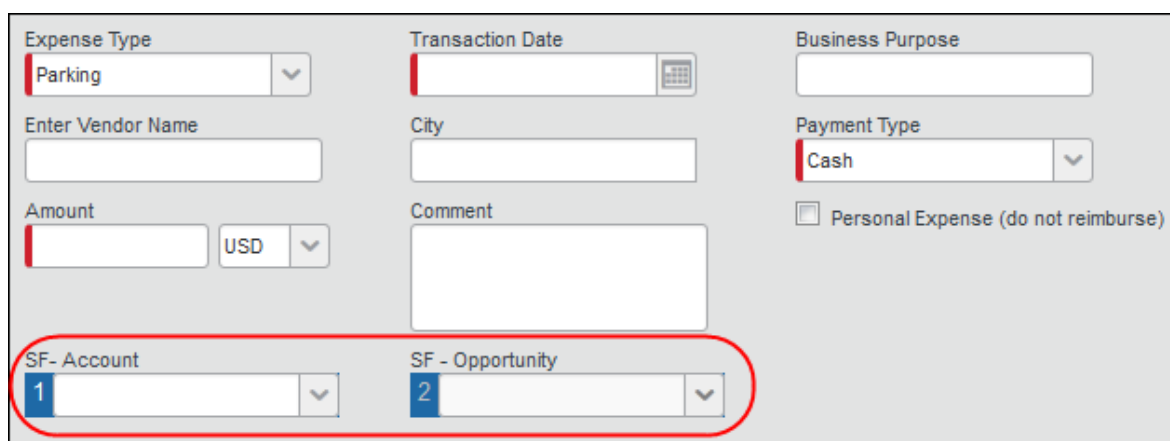


The screenshot shows the Concur Expense form with the following fields:

- Expense Type:** Parking (dropdown)
- Transaction Date:** (calendar icon)
- Business Purpose:** (text input)
- Enter Vendor Name:** (text input)
- City:** (text input)
- Payment Type:** Cash (dropdown)
- Amount:** (text input) with a USD dropdown
- Comment:** (text area)
- Personal Expense (do not reimburse):** (checkbox)
- SF- Account:** (dropdown menu, highlighted with a red circle)

Two Objects

If the administrator selects two Salesforce objects to track, the connector will create a two-level connected list in Expense, which is associated to two-level connected list fields:



The screenshot shows the Concur Expense form with the following fields:

- Expense Type:** Parking (dropdown)
- Transaction Date:** (calendar icon)
- Business Purpose:** (text input)
- Enter Vendor Name:** (text input)
- City:** (text input)
- Payment Type:** Cash (dropdown)
- Amount:** (text input) with a USD dropdown
- Comment:** (text area)
- Personal Expense (do not reimburse):** (checkbox)
- SF- Account:** (dropdown menu, highlighted with a red circle and containing the number 1)
- SF - Opportunity:** (dropdown menu, highlighted with a red circle and containing the number 2)

Three Objects

If the administrator selects three Salesforce objects to track, the connector will create a three-level connected list in Expense, which is associated to three-level connected list fields:

The screenshot shows a form with several fields. At the bottom, three dropdown menus are highlighted with a red oval. The first dropdown is labeled 'SF- Account' and has the value '1'. The second dropdown is labeled 'SF - Opportunity' and has the value '2'. The third dropdown is labeled 'SF - Contract' and has the value '3'.

If the administrator selects multiple Salesforce objects to create a connected cost object, the result is an object chain. The lowest-level object in a chain (the second or third object) is the object that costs will be tracked against. Objects can only be tracked in one object chain, however they can appear at other levels in other object chains.

Once the object or object chain is added to Cost Tracking, the connector will create a list in Concur Expense for the cost object. A single object will have a list labeled **SFCC.<ObjectName1>**, while a three-level chain will have a list labeled **SFCC.<ObjectName1>.<ObjectName2>.<ObjectName3>**. If the list name is too long, the connector will truncate the object names. Creating the list completes the Salesforce configuration, and prepares Concur Expense for the next configuration step.

NOTE: The Opportunity object was used in previous connector versions, and has a different list name. Its list will always be named **Salesforce Opportunity**.



Some Salesforce objects are not available to use in Cost Tracking. Refer to the *Salesforce Objects Not Available for Cost Tracking* section in this guide for the full list.

For simple cost objects, the Concur Expense administrator associates an Expense field with the new associated list, and adds this field to the relevant forms. For connected cost objects, the Concur Expense administrator creates a new connected list definition, using the associated list, for each relevant form.

These lists are configured to use Salesforce as their data source instead of Concur Expense. When Expense users access these list fields, Concur Expense will call out to Salesforce and fetch relevant list items for these users.

NOTE: Salesforce controls what objects users can access, so the users must have access to the objects in Salesforce to see the list items in Concur Expense.

HOW DOES THE COST DATA GET INTO SALESFORCE?

When the user selects a list value in the field in an expense report entry, Concur Expense saves the list item value with the expense amount. When the report is submitted, the amount is added to the total for Unpaid Expenses. When the report is approved for payment, the amount is moved to the Paid Expenses total for the associated Salesforce object.

The Connector gets the aggregate spend for cost objects by running a job in Salesforce. The connector sets a daily job to run 2:00 AM, and the administrator can choose to add hourly jobs, running at different minutes of each hour. This job gets the total unpaid and paid expenses for each cost object from Concur Expense and stores these values into these two custom fields for each Salesforce object:

- Accruing/Unpaid Expense Total
- Final/Paid Expense Total



For more information, refer to the *Configuring Cost Tracking* section of this guide.

Section 3: User Experience

The user can activate the Concur Salesforce Connector from within Salesforce.

NOTE: The screenshots in the guide reflect the latest version of Salesforce that is supported by the Concur Salesforce Connector.

The user can activate the connector from within Salesforce. They select the **My Concur** tab and see the **Setup** page for the Connector.

The user clicks **Get Started**, and is prompted to log in to Concur Expense in order to grant the connector access to their Concur Expense account.

After the user logs in, they are informed of the changes the connector would like to make.

After the user clicks **Approve Access**, the **My Concur** page loads, showing the list of their recent trips from Travel and/or TripIt Pro.

The user can also grant the connector access to their Salesforce data from within Concur, when they use any connected cost object fields or search for attendees.

NOTE: The Concur Salesforce Connector does not have the concept of delegates, so it is not possible to access Concur data as a delegate from within Salesforce. However, a Concur Expense user can act as a delegate and access the Salesforce data elements (such as account, opportunity, attendees, and so on) associated with the user they are delegating for, when logged into Concur Expense directly.

Cost Object Tracking

The administrator can configure Concur to display cost objects in the expense entry, allocation, and other pages, that use Salesforce as a data source. These fields allow the user to select values for the Salesforce objects while filling out their expense reports, associating the costs with the Salesforce objects. The user sees the configured fields on the expense entry and allocation pages, and possibly on other pages, depending on configuration.

This single object example shows the Custom 01 field configured to use the Salesforce Account object as a source.

When the user selects the down arrow on the Account field, the connector pulls all Accounts that the user has access to from Salesforce. Then the user saves the expense entry, and the expense amount information is saved with the Salesforce object information. The connector pulls the expense information from Concur to Salesforce regularly.

This connected object example shows the Custom 01 field configured to use the Salesforce Account object as a source, and the Custom 02 field configured to use the Salesforce Opportunity object as a source. The two fields form a connected list.

When the user selects the down arrow on the first field, the connector pulls all Accounts that the user has access to from Salesforce. Once the user selects the desired account, they click the down arrow on the second field. The connector will then pull all Opportunities associated with the selected Account that the user has access to in Salesforce. Then the user saves the expense entry, and the expense amount information is saved with the Salesforce object information. The connector pulls the expense information from Concur to Salesforce regularly.

This connected object example shows the Custom 01 field configured to use the Salesforce Account object as a source, the Custom 02 field configured to use the Salesforce Opportunity object as a source, and the Custom 03 field configured to use the Salesforce Contract object as a source. The three fields form a connected list.

When the user selects the down arrow on the first field, the connector pulls all Accounts that the user has access to from Salesforce. Once the user selects the desired account, they click the down arrow on the second field. The connector will then pull all Opportunities associated with the selected Account that the user has access to in Salesforce. Once the user selects the desired Opportunity, they click the down arrow on the third field. The connector will then pull all Contracts associated with the selected Account and Opportunity that the user has access to in Salesforce. Then the user saves the expense entry, and the expense amount information is

saved with the Salesforce object information. The connector pulls the expense information from Concur to Salesforce regularly.

NOTE: The first time the user uses a cost object connected to Salesforce, they will be prompted to confirm that they want Concur to access their Salesforce information. If they have not activated the connector in Salesforce, they will be asked to log in to their Salesforce account. The confirmation is stored, and the user will not have to confirm again the next time they use either feature. The Salesforce user account determines which organization's objects the user sees in Concur.

The cost tracking fields are configured as simple lists with dropdown, which display a maximum of 500 items.

All list fields support wildcard (*) searches. To search for all list items starting with T, enter T* in the field.

Attendees in Salesforce

The user can search for attendees in Salesforce when adding attendees to an expense. This feature is most often used to search Contacts, however any Salesforce object may be used for this search.

The user clicks the **Advanced Search** button in the **Attendees** section.

The user selects the appropriate attendee type, enters the search text and clicks **Search**. The attendee type name and the fields available on the attendee search page will vary based on configuration.

The search logic is as follows:

- Searching with no wildcards results in a "starts with" search.
- Searching with a wildcard at the end of the string results in a "starts with" search (same as the previous result).
- Searching with a wildcard at the beginning of the string results in a "contains" search.

Concur connects to Salesforce to pull the list of matching attendees in Salesforce for the user.

When the user saves the expense, the attendee information is saved in Expense.

LEGACY SALESFORCE CONTACTS FEATURE

If the Salesforce administrator has not specifically mapped Salesforce object fields to Expense attendee search fields, the client is using the legacy Contacts feature.



For more information, refer to the *Search for Attendees in Salesforce* section of this guide.

Clients using the legacy Contacts feature have the following search restriction: The users can search on these fields: First Name, Last Name, Company, and Title. Any other search criteria will be ignored.

Trips

The user's trips, from Travel or TripIt Pro, will appear in Salesforce in the **My Trips** section of the **My Concur** tab.

NOTE: The **Edit** button will appear, however any changes to the trip details will not be sent back to Travel.

The user can click **Share** to share their trip details with other users via Chatter. When the trip has been shared, it appears in the Chatter stream of any users following the traveler.

The user or follower can click on the trip name to view the trip details.

Trips must be created in Travel, or in a TripIt Pro account that is connected to Travel, in order to appear in the **My Trips** section.

Expense Reports

The user's active expense reports will appear in Salesforce in the **My Active Reports** section of the **My Concur** tab.

The user can click **Refresh** to get their latest reports from Concur, or click **Concur** to launch a new window into their Active Reports view in Concur.

Card Charges

The user's unused card transactions will appear in Salesforce in the **My Card Charges** section of the **My Concur** tab.

The user can click **Refresh** to get their latest charges from Concur.

Expense Report Approvals

The user's pending expense report approvals will appear in Salesforce in the **My Report Approvals** section of the **My Concur** tab.

The user can click **Refresh** to get their latest approvals from Concur, or click **Concur** to launch a new window into their Active Reports view in Concur.

Section 4: Before You Begin

! IMPORTANT: The Salesforce Connector cannot be installed in an Implementation environment.

Prerequisites

The client must:

- Be an existing Concur client, with Expense, and optionally Travel.
- Have an existing Salesforce Organization, with one of the following Salesforce products:
 - ♦ Enterprise
 - ♦ Unlimited
- Have Chatter enabled in their Salesforce Organization. The administrator can choose to disable Chatter once the connector is installed, but it must be active during the installation process.
- The Salesforce Administrator who will be setting up the package must also have an Admin user account in Expense or Travel. If the client has multiple Salesforce organizations, the administrator for each organization must have this role, as they each install the connector individually in their organizations.

! Clients must not connect a sandbox Salesforce organization to their Concur production entity. Verify that the organization and Concur credentials are both for production environments before proceeding.

The end user must:

- Have an active Concur account with access to Expense and optionally Travel.
- Have a Salesforce account. Users with the Platform User license will only be able to use the Trips functionality.
- Have a user license with access to the Opportunity object and any other Salesforce objects used in the cost tracking. Without this access, the user will not be able to use the configured cost tracking fields in Concur.



For more information, refer to the *Features > Track Expense Cost Object by any Salesforce Object* section of this guide.

Section 5: Configuration

Overview

The Concur Salesforce Connector must be purchased from Concur. Once it is purchased, the Salesforce administrator completes the following actions. If the client

has multiple Salesforce organizations, these actions must be completed in each organization by that organization's administrator.

- Install the package in their Salesforce Organization
- Receive the required SSO key from Concur
- Connect their Salesforce organization to Concur using both the **Concur Connector Setup** page and the SSO key

Once the Setup is complete, each user that needs to use the connector must log in to Salesforce, and activate the connector by confirming that the connector can access their Concur data.

For new installations, the Configuration process includes a Concur configuration step. This step should be completed when the connector is installed in the first Salesforce organization. Each additional organization install can skip this step.

Clients upgrading from a previous version do not need to repeat the Concur configuration as these steps have not changed.

Connector Installation/Setup Process

Managing User Access to the Connector

There are two different access points for the Concur Salesforce Connector:

1. The **My Concur** tab within Salesforce
2. The configured cost tracking fields within the expense entry page in Concur

The administrator may be able to control which users can access the connector through Salesforce and Concur configuration.

MY CONCUR TAB ACCESS CONTROL

The ability to control access to the **My Concur** tab in Salesforce varies depending on the version of Salesforce. The Enterprise and Unlimited versions of Salesforce allow control of the **My Concur** tab based on user profiles. The administrator can update or create a custom user profile that allows access to the **My Concur** tab, and only set certain users to use that profile. All users with a different user profile will not see the **My Concur** tab.



Refer to the *User Profiles* section of this guide for more information.

EXPENSE ENTRY FIELDS ACCESS CONTROL

The ability to control access to the Salesforce expense entry fields varies depending on the Concur product. The Concur Professional/Premium product includes the ability to restrict access to the Connector fields based on group configuration. The Concur administrator can choose to add the Salesforce fields to the expense entry form for the group that needs access to the connector. All other groups can use a separate

expense entry form that does not include the fields. Multiple groups can be granted access to the Connector in this manner.



Refer to the *Expense: Forms and Fields Setup Guide* for more information.

User Profiles

To use the Concur Salesforce Connector in the **Enterprise** or **Unlimited** versions of Salesforce, users must have the **Concur User** access level applied to their profile.

In the Enterprise or Unlimited versions of Salesforce, the Concur User access level may be applied only to **custom** profiles. It can't be added to **standard** profiles. This means that all users who will use the Concur Salesforce Connector must have a custom profile. These users cannot use a standard profile.

This section applies only to organizations using Enterprise or Unlimited versions of Salesforce that have Concur Salesforce Connector users that are presently using a standard profile.

You can skip this section if:

- You use the Enterprise or Unlimited versions, but do not have any users using a standard profile.

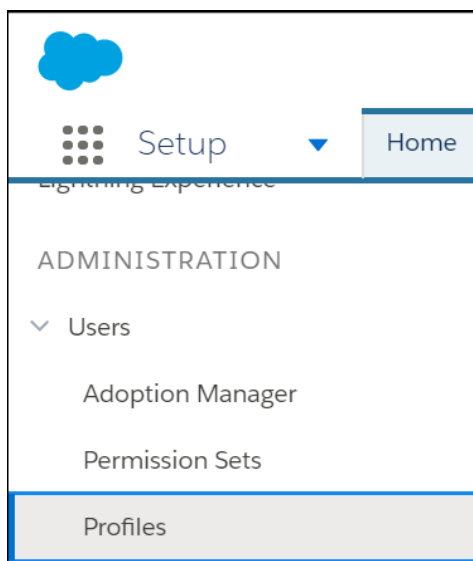
If your Salesforce organization uses the standard user profiles, the Salesforce administrator will need to create custom user profiles for the users that need to access the connector.

▶ To create a custom user profile:

1. Log in to Salesforce as an administrative user.
2. Click the gears (⚙) > **Setup**. The Salesforce Home tab appears.



- Under ADMINISTRATION in right panel, click **Profiles**.



- In the center column, click **New Profile** (button). The **Clone Profile** page appears.
- Fill in the fields:

Field	Value
Existing Profile	Standard User
Profile Name	Concur Connector Standard User

- Click **Save**.
- Click **Profiles** (left menu).
- Click **New Profile**.
- Fill in the fields:

Field	Value
Existing Profile	Standard Platform User
Profile Name	Concur Connector Standard Platform User

NOTE: Cloning the Standard Platform User profile into the custom Concur Connector Standard Platform User profile is necessary only if the organization uses the Standard Platform User profile for any user that you would like to use the Concur Salesforce Connector.

The screenshot shows the Salesforce Setup interface. On the left, the 'ADMINISTRATION' menu is expanded, and 'Profiles' is selected. The main content area is titled 'Clone Profile' and includes a sub-header 'Enter the name of the new profile.' Below this, a message states 'You must select an existing profile to clone from.' The form contains three fields: 'Existing Profile' with a dropdown menu showing 'Standard Platform User', 'User License' with a dropdown menu showing 'Salesforce Platform', and 'Profile Name' with a text input field containing 'Concur Connector Standard'. The 'Profile Name' field is highlighted with a red box. At the bottom right, there are 'Save' and 'Cancel' buttons.

10. Click **Save**.

Connector Package Installation

NOTE: To upgrade the Salesforce Connector to the latest version, you must log a case in the Concur Support Portal.

If an error occurs during the package installation, Salesforce will send an email to the currently logged in admin account with error information.

▶ ***To install the Concur Salesforce Connector package:***

1. Log in to Salesforce as an administrative user.

2. Enter the installation package URL into your browser's Address bar. This URL is provided by Concur.
3. Click **Install for Specific Profiles**. The list of configured profiles appears.

Install Concur Connector
By Concur

☐ Install for Admins Only
 ☐ Install for All Users
 ☒ Install for Specific Profiles...

Install **Cancel**

Select Specific Profiles

These security settings determine access to the custom objects and components installed in the package. It doesn't affect permissions for existing objects.

i Standard profiles (including the Read-Only profile) don't receive access to any installed custom objects. Because permissions are not editable for standard profiles, you must clone your profile to grant access.

Set access level for all profiles to: **No Access** **Set**

Profile	Access Level
System Administrator	Full Access (Your profile must have full access to the package)
Standard Platform User	No Access

4. For all profiles that need to access the connector, select **Concur User**.

Concur Connector Standard Platform User

Access Level: **No Access**, **Full Access**, **Concur User**, **No Access**

- Click **Install** (top). The **Approve Third-Party Access** window appears.

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?

Website	SSL Encrypted
eu1.concursolutions.com	<input checked="" type="checkbox"/>
www.concursolutions.com	<input checked="" type="checkbox"/>

☒ Yes, grant access to these third-party web sites

Continue
Cancel

- Click **Continue**. The installation begins.

Install Concur Connector

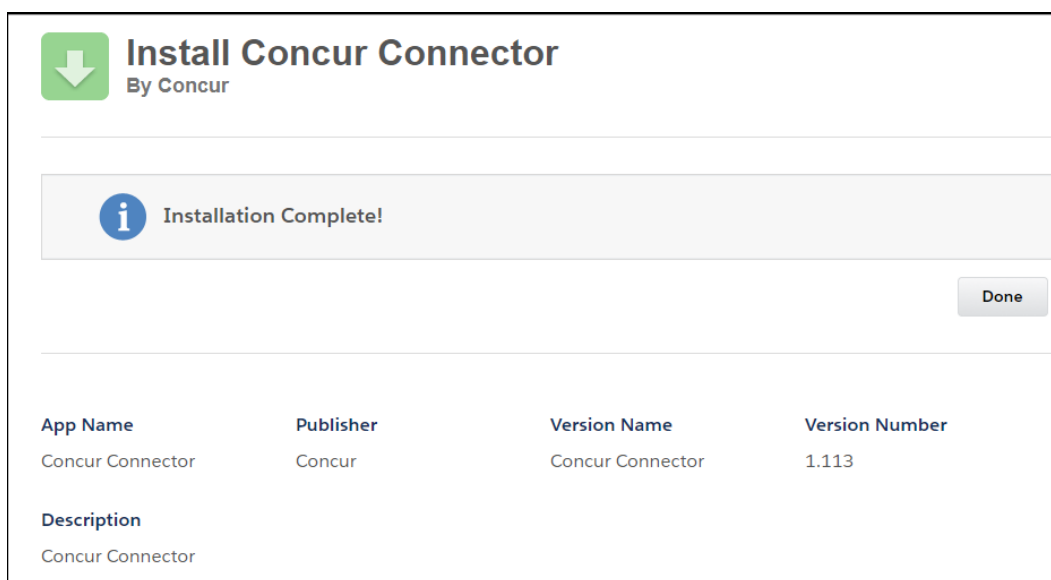
By Concur

Installing and granting access to all Users...

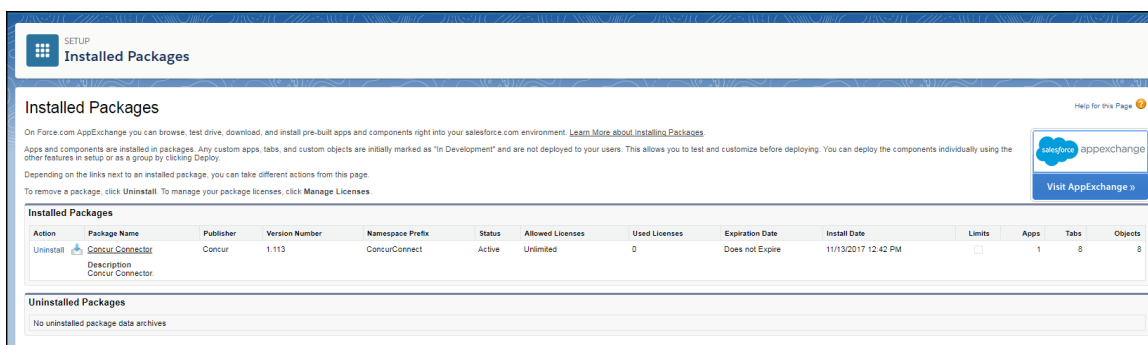
App Name	Publisher	Version Name	Version Number
Concur Connector	Concur	Concur Connector	1.113

Description
Concur Connector

Additional Details [View Components](#)

7. Click **Done**.

After the installation completes, the **Installed Packages** page displays.



Connector Configuration Process

After installing and deploying the Concur Connector, the Salesforce administrator performs the Connector Setup process. This process is completed in each Salesforce organization that the connector is installed into.

The Connector Setup process prepares the client's Concur company and Salesforce organization to use the connector features. It performs the following configuration:

- Establishes the SSO connection between the Concur Salesforce Application and Concur.

The first time it is run, it also does the following configuration:

- Creates the Concur Salesforce Connector data source to use with the Salesforce Contacts attendee type.
- Creates the Salesforce Opportunities connected list to use with the Salesforce Opportunity field.

FIRST INSTALL

For the first organization of a multi-organization company, or for single organization companies, the administrator will also complete the *Concur Expense Configuration* step detailed later in this guide. Each subsequent organization in a multi-organization company does not need to complete the *Concur Expense Configuration* step again.

UPGRADE

Each organization that installs the connector must complete the Connector Configuration Process. Upgrading clients do not need to complete the *Concur Expense Configuration* step again.

USER REQUIREMENT

Before running the Setup, make sure that the Salesforce Administrator user has a corresponding Admin user account in Expense. Once the user authenticates to Concur, the Salesforce user and Expense user will be linked together.

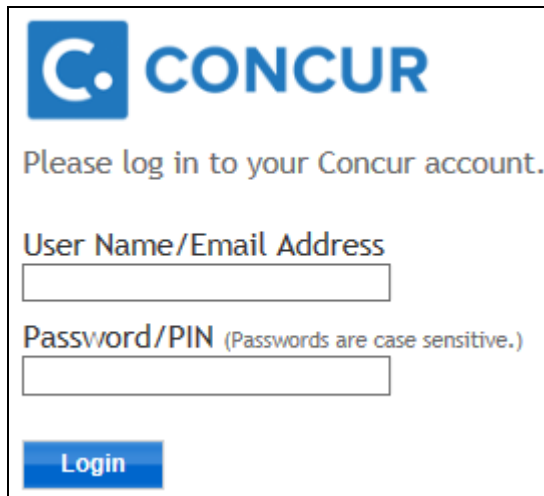
! Before running Setup, Concur Implementation must configure the site to use SSO from Salesforce to Concur. Multi-organization companies use the same SSO key for each organization.

▶ **To run the Setup process:**

1. Click the App Launcher (📦) and select **Concur Connector**. The **My Concur** page appears.
2. Click the **Setup** tab. The setup tab appears

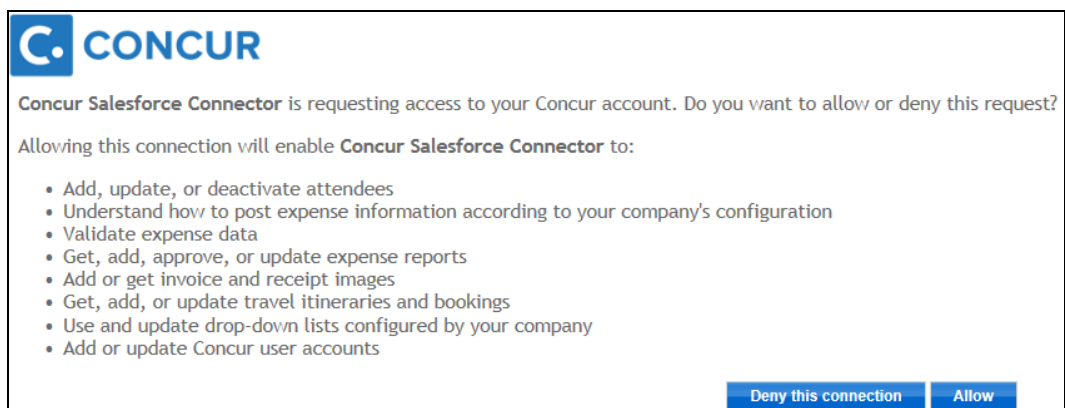
NOTE: This is the Concur Setup tab, and should not be confused with Salesforce Setup tab reference in other sections of this document

3. Click **Get Started**. The Concur login page appears.



The image shows the Concur login page. At the top is the Concur logo, which consists of a blue square with a white 'C' and the word 'CONCUR' in blue. Below the logo, the text 'Please log in to your Concur account.' is displayed. There are two input fields: 'User Name/Email Address' and 'Password/PIN (Passwords are case sensitive.)'. Below these fields is a blue 'Login' button.

4. Log in to Concur.



The image shows the Concur Salesforce Connector authorization page. At the top is the Concur logo. Below it, the text reads: 'Concur Salesforce Connector is requesting access to your Concur account. Do you want to allow or deny this request?'. Below this is a section titled 'Allowing this connection will enable Concur Salesforce Connector to:' followed by a list of permissions:

- Add, update, or deactivate attendees
- Understand how to post expense information according to your company's configuration
- Validate expense data
- Get, add, approve, or update expense reports
- Add or get invoice and receipt images
- Get, add, or update travel itineraries and bookings
- Use and update drop-down lists configured by your company
- Add or update Concur user accounts

 At the bottom right, there are two buttons: 'Deny this connection' and 'Allow'.

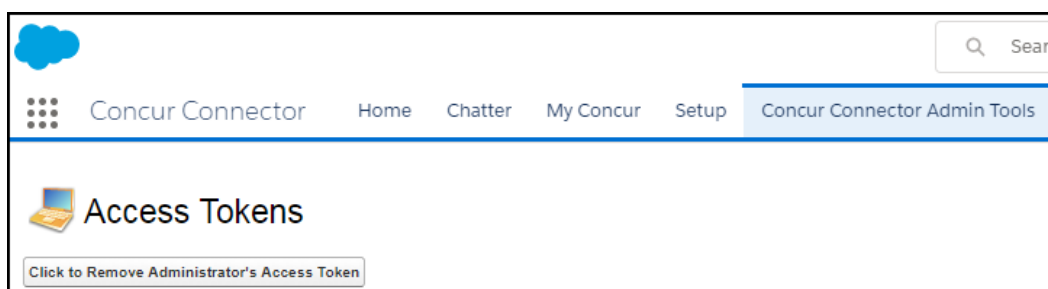
5. Click **Allow**. The **Setup** page appears, detailing the connector features.
6. Enter the SSO Key for the site into the **SSO Key** field.
7. Click **Finish Setup**. The connector completes the configuration of the client's Concur company.

► **To reset the authentication to Concur:**

The authentication to Concur is managed in the **Concur Connector Admin Tools** tab. If there is a problem with the administrator account that was used to install the connector (mistaken login, incorrect Expense permissions, etc), the administrator token can be reset to a new account.

1. Select **Concur Connector** from the application menu.
2. Click the Concur Connector Admin Tools tab.

3. Click **Remove Administrator's Access Token**.



The administrator's Concur login information is removed. The next time you access the **My Concur** tab, you will be taken through the setup process again.



Refer to the *Salesforce Administrator Access Token Must be Updated* information in the *Troubleshooting* section of this guide for more information.

Configuring Cost Tracking

The **Cost Tracking Configuration** tab allows the administrator to configure Salesforce objects so they can be associated with Concur Expense cost objects. The administrator can select one or more list object(s) in Salesforce (single or linked), and the Connector will update Concur with the object list information. The Concur administrator can then associate an Expense field with the Salesforce object. Once this association is complete, the Expense field will display the list values from the Salesforce object list. The end user can select the correct value in the list to associate the expense with a Salesforce object list item. During the configuration process, the Salesforce object gains additional fields in Salesforce that track the expenses.

NOTE: Salesforce controls which objects a user can access. If the user is able to access the object in Salesforce, they will be able to access the mapped cost object in Concur.

When you select multiple (linked) objects, the expense amounts will be calculated and stored for the lowest-level object in the chain. Because of this, each object can only be the lowest-level object in one chain. However, the object can be used higher up in multiple chains.



Refer to the *Features > Track Expense Cost Object by Any Salesforce Object* section of this guide for more information.

ADDING OBJECTS TO COST TRACKING

The Salesforce administrator and Concur administrator must work together to configure the Salesforce objects and the Expense cost objects for this feature. The general steps are listed here. The detailed steps are laid out next in this guide.

In Salesforce

1. Select the Salesforce objects to track costs against. These can be standard or custom objects.



Some Salesforce objects are not available to use in Cost Tracking. Refer to the *Salesforce Objects Not Available for Cost Tracking* section in this guide for the full list.

2. **(Important)** Add two custom cost fields to the selected object(s).



If this step is not completed, the admin will receive an error when trying to select the object(s) in step 3.



Refer to the *To add the custom cost fields to the object* procedure in this section for details.

3. Select the Salesforce objects in the **Cost Tracking Configuration** tab.



Refer to the *To add objects to cost tracking procedure* in this section for details.

4. Add the custom cost fields to the desired page layouts.



Refer to the *Adding the Connector Fields to the Page Layouts* section of the guide for details.

In Concur

1. Modify the custom cost object field(s) to use the connector as a data source.



Refer to the *Concur Expense Configuration > Salesforce Cost Objects Configuration* section of this document for details.

2. Add the fields to the appropriate forms.



Refer to the *Concur Expense Configuration > Salesforce Cost Objects Configuration* section of this document for details.

3. Repeat for each required group.

► **(Important) To add the custom cost fields (example: Currency) to the object in Salesforce:**

1. Navigate to **Fields and Relationships** in **Object Management** to add the two currency fields.
2. Click the gears (⚙) > **Setup**. The Salesforce Home tab appears.

3. Under **Platform Tools**, click **Objects and Fields > Object Manager**. The **Setup Object Manager** appears.
4. Click **Object** (standard or custom).
5. Click on **Fields and Relationships**.
6. Click **New** (button). The **New Custom Field** page appears.
7. Under the **Choose the field type**, click **Currency** (radio button).
8. Click **Next**. The **Enter the details** page appears.
9. In the Field Label, enter a currency label.

NOTE: Currency Label 1: Accruing / Unpaid Expense Total

NOTE: Currency Label 2: Final/Paid Expense Total

10. In the Length field, enter 16.
11. In the Decimal field, enter 2.
12. In the Field Name field, enter a currency label.

NOTE: Currency Label 1: AccruedUnApprovedExpenseTotal

NOTE: Currency Label 2: FinalExpenseTotal

13. Click **Next**. The **Establish Field Level** page appears.
14. Select all Visible check boxes. At a minimum, the Salesforce System administrator's profile must have the Visible check box selected.
15. Click **Next**. The **Add to page layout** appears.
16. Select the check boxes for the desired page layouts.
17. Click **Save & New**.
18. Repeat these steps for Currency Label 2.

► **To add objects to cost tracking:**

NOTE: Concur pre-configures the Opportunity object on the **Cost Tracking Configuration** page. If desired, you may modify its configuration.

1. Select the **Cost Tracking Configuration** tab.

The screenshot displays the 'Cost Tracking Configuration' page within the Concur Connector Admin Tools. The 'Object Cost Tracking' section includes a dropdown menu for 'Select Objects for Cost Tracking' currently set to 'All Objects (limit 1000)'. Below this are three dropdown menus for 'Select required level-1 object', 'Select optional level-2 object', and 'Select optional level-3 object'. An 'Add to Cost Tracking' button is located below these dropdowns. The 'Objects Currently Configured for Cost Tracking' section shows a list containing 'Opportunity [ConcurList: Salesforce Opportunity]'. At the bottom, the 'Concur Synchronization Scheduler' section features a 'Schedule new synchronization job' button and a dropdown menu for 'to run hourly at' set to '35 Minute'.

2. (Optional) In the **Select Objects for Cost Tracking** section, select the desired filtering options.

This close-up screenshot shows the 'Select Objects for Cost Tracking' dropdown menu. The menu is open, displaying the following options: 'All Objects (limit 1000)', 'Standard Objects', 'starts with', and 'contains'. The 'All Objects (limit 1000)' option is currently selected and highlighted. The dropdown is part of a larger form that includes other dropdown menus for 'Select required level-1 object', 'Select optional level-2 object', and 'Select optional level-3 object'.

If you select *starts with* or *contains*, you can enter text in the text box, and click **Filter** to limit the list of objects. The text filter is based on the object name, not the object label.

3. Select the first level object to track.
4. (Optional) Select an optional search field based on the object.

EXAMPLE

Selecting the **Asset** object allows three search fields to become available for selection: **Asset Number**, **Serial Number**, and **Status**.

5. (Optional) Select the second and third level objects and search fields, to track linked objects.
6. Click **Add to Cost Tracking**. The new object chain will appear in the **Objects Currently Configured for Cost Tracking** window.

Single-level:

Object Cost Tracking

Select Objects for Cost Tracking: All Objects (limit 1000)

Asset (Asset) Asset Name

----- Select optional level-2 object -----

----- Select optional level-3 object -----

Multi-level:

Object Cost Tracking

Select Objects for Cost Tracking: All Objects (limit 1000)

Asset (Asset) Asset Name

Case (Case) Case Number

----- Select optional level-3 object -----



The **Objects Currently Configured in Concur** and the **Synchronize** button only display when they are needed. For more information, refer to the *Troubleshooting* section of this guide.

Objects Currently Configured in Concur:

Account > Contact [ConcurList: Salesforce Account>Salesforce Contact]
Opportunity [ConcurList: Salesforce Opportunity]

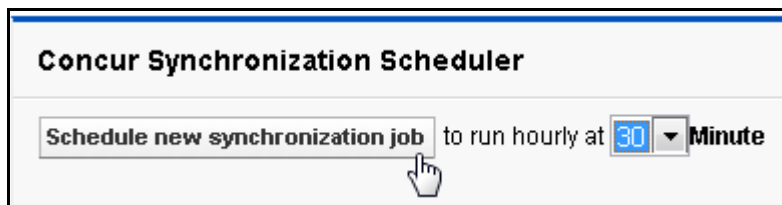
► **To remove objects from cost tracking:**

1. Select the object chain in the **Objects Currently Configured for Cost Tracking** window.
2. Click **Remove from Cost Tracking**.

NOTE: This process does not remove the fields from the expense forms in Concur. The fields must be removed from the forms in **Forms and Fields** in Expense Admin, if desired.

► **To modify the synchronization schedule:**

1. In the **Concur Synchronization Scheduler** section, select the minute within each hour that you would like to schedule a new synchronization job.



2. Click **Schedule new synchronization job**.

Add the Connector Fields to the Page Layouts

The page layout(s) must be updated with the Connector fields used in Cost Tracking. Concur provides an Opportunity layout with this configuration that the Salesforce administrator can use as an example. The administrator should complete the following process with every page layout for every cost tracking object.

► **To add the connector fields to the page layout:**

1. In Object Management, navigate to **Fields and Relationships**.
2. Click on object (standard and custom) to create / update page layout.
3. Click **Page Layout**.
4. Click **New** to create a new layout. Otherwise, click on an existing layout to modify.
5. Select an existing page layout to clone or select **None**.
6. Enter the text for a new page layout.
7. Click **Save**.
8. Click fields (right pane).
9. Drag and drop the desired fields into the page layout.
10. Name this new section **Concur Expense** and accept the default settings.
11. Click **OK**.

12. Drag and drop the two new fields into the section.

Field	Description
Accruing/Unpaid Expense Total	The total amount of unpaid expenses accrued against the opportunity. These expenses have been entered into expense reports, but the reports have not been paid yet.
Final/Paid Expense Total	The total amount of paid expenses accrued against the opportunity. These expenses have been entered into expense reports, which have been paid.

For the **Opportunity** object, add these additional fields:

Field	Description
Accruing/Unpaid Expense	The unpaid expense amount, as a percentage of the total Expected Revenue.
Final/Paid Expenses	The paid expense amount, as a percentage of the total Expected Revenue.

13. Click **Save**.

(Optional) Scheduling Additional Synchronization Jobs

The Connector installation process automatically creates a job to synchronize data between Concur and Salesforce. This job runs hourly at the 00 minute. If you would like to have the job run more often, you can schedule additional jobs on the **Cost Tracking Configuration** tab. The new jobs will run once an hour, on the selected minute.

► To schedule additional synchronization jobs:

1. Log in to Salesforce with an administrator account.

2. Select **Cost Tracking Configuration** (tab).

3. In the **Concur Synchronization Scheduler** section, select the minute that you would like the job to run.

NOTE: The 00 minute is reserved for use by the automatically created job and is not available in the list.

4. Click **Schedule new synchronization job**.

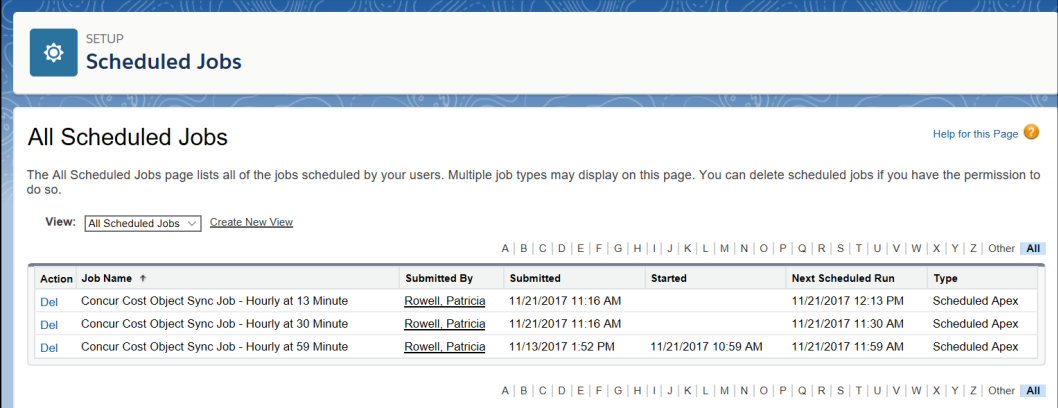
ADDITIONAL JOB VIEW

Clients can view their scheduled jobs using the App Setup area. The Salesforce Organization Administrator follows these steps to view the scheduled Concur Synchronization job(s).

NOTE: If the administrator views the details of the automatically created job by clicking **Manage**, it will appear that the job is set to run once a month. This is a known display issue. The job is actually scheduled to run hourly on the 00 minute.

► **To view the scheduled synchronization job(s):**

1. Click the gears (⚙️) > **Setup**. The Salesforce Home tab appears.
2. Under **Platform Tools**, click **Environments**.
3. Click **Jobs**.
4. Click **Scheduled Jobs**. The Connector jobs will now appear on your **All Scheduled Jobs** page.



SETUP Scheduled Jobs

All Scheduled Jobs [Help for this Page](#)

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

View: **All Scheduled Jobs** [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Del	Concur Cost Object Sync Job - Hourly at 13 Minute	Rowell, Patricia	11/21/2017 11:16 AM		11/21/2017 12:13 PM	Scheduled Apex
Del	Concur Cost Object Sync Job - Hourly at 30 Minute	Rowell, Patricia	11/21/2017 11:16 AM		11/21/2017 11:30 AM	Scheduled Apex
Del	Concur Cost Object Sync Job - Hourly at 59 Minute	Rowell, Patricia	11/13/2017 1:52 PM	11/21/2017 10:59 AM	11/21/2017 11:59 AM	Scheduled Apex

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

(Optional) Disabling Chatter

The administrator may wish to disable Chatter after the package installation.

► **To disable Chatter:**

1. Click the gears (⚙️) > **Setup**. The Salesforce Home tab appears.
2. Under **Platform Tools**, click **Feature Settings**.
3. Click **Chatter**.
4. Click **Chatter > Settings**.
5. In the **Chatter Settings** section, click **Edit**.
6. Clear the **Enable** check box.
7. Click **Save**.

Combined Concur and Salesforce Configuration

Choosing Salesforce Attendee Search Fields

The Connector allows Expense users to search for attendees in Salesforce while creating their expenses. The attendee fields that they can search on, and bring into Expense, are configured by both the Concur admin and the Salesforce admin.

The Concur and Salesforce administrator determine which Expense fields to associate with Salesforce object fields. In Salesforce, the Contact object is the most frequently used object, however any Salesforce object can be used as the basis for the attendee information. Any data in the Salesforce fields is brought into the mapped Expense fields when the user adds the attendee to the expense entry.

The Concur administrator and the Salesforce administrator must collaborate to choose which Expense and Salesforce object fields will be mapped. The Expense admin determines which Expense fields are required, and whether the attendee form should contain any additional fields. The Salesforce administrator then determines which Salesforce object fields align with the Expense fields. Salesforce object fields with the following types can be used: Text (aka String), Email, Picklist.

The minimum required field is:

- Last Name

The Concur administrator will add the selected Expense fields to the attendee search page later in the configuration process.

The following Expense attendee fields are not available for mapping:

- External ID
- Attendee Type
- Created By

Concur Expense Configuration

Once the connector Setup process has been completed, Concur Expense requires configuration. The Concur users who make these configurations need to have the necessary administration roles.

This process is completed once during the initial connector install. For companies with multiple organizations, this process is completed when the connector is installed in the first organization, and does not need to be repeated for additional organizations. When upgrading from a previous version of the connector, the administrator does not need to repeat these steps.

(Optional) Application Connector Update

If you would like to use additional Attendee Types with the connector, you must update the application connector. A Concur user must have the **Can Administer** role to perform these configurations.

► **To update the application connector:**

1. Click **Administration > Company > Web Services > Manage Application Connectors**.
2. Select the **Concur Connect Salesforce Application**.
3. Click **Modify**.
4. In the **Services** area, select **Fetch Attendee**.
5. Click **Configure**.
6. Select the attendee types to use with the connector. The default attendee type is already selected.

NOTE: Before Concur can fetch Salesforce Attendees, they must already be configured in Expense. For more information, refer to the subsequent *Attendees from Salesforce Configuration* section of this guide.

7. Click **OK**.
8. Click **Save**.

Salesforce Cost Objects Configuration

If the company is using the **Track Expense Cost Object by any Salesforce Object** feature, the Concur administrator must associate the selected Salesforce objects with Concur cost objects.

The administrator must complete the following steps for the objects:

Single Objects:

- Configure a custom field on the desired form type (Expense Entry, Expense Allocation, etc.) to use the list associated with the object. The connector names the new list it creates **SFCC.<ObjectName1>**. If the list name becomes too long, the object names will be truncated.

NOTE: The Opportunity object list will be labeled **Salesforce Opportunity**, to support functionality from previous versions.

- Add this field to the desired form(s) for each necessary group.
- Update the field name on the desired form(s) for each necessary group.

Connected Object Chains:

Configure a connected list definition for the object chain on the desired form type for each necessary group with the following steps:

- Select the list that the connector created for this linked object. The connector names the new list
SFCC.<ObjectName1>.<ObjectName2>.<ObjectName3>.

NOTE: The list will appear to be a single-level list. Once the connector begins importing data at multiple levels, the list will be updated automatically to a multi-level list.

- Configure one custom field for each object in the chain.
- Select the desired forms to update with the list fields.

Please note the following about the configuration:

- The cost object must be added to the Expense Entry, and Expense Allocation forms, at a minimum, for the feature to work.
- The allocation field must copy down from the expense entry field.
- The connected list definition for the allocation form should copy down from the expense entry form.
- The connected list definition should not use the same name as the list. This can cause problems with some configurations.
- The single object field must be configured as a simple list field with dropdown.
- The form field should not be set to Required.
- **Expense Entry Fields:** Employees must have Modify rights to the fields. The Approver or Expense Processor roles will see their own opportunities when modifying the field, so they should only be set to Modify if they have access to the same opportunities as the user in Salesforce.
- **Allocation Fields:** For the Employee Role select the appropriate value. This will depend on whether the client wants the Employee to make allocations by Salesforce Opportunity. If they do, set this to Modify. If not, select Hidden.



Refer to the *Expense: Forms and Fields Setup Guide* for more information on the form, field, and connected list definition procedures.

Filtering Cost Object Lists That Displayed in Concur

If the field, **Filter Field**, is used, the lists displayed to users, such as the Salesforce Opportunity, can be much shorter and easier to navigate.

To use this feature, configure the **Filter Field** for the **Cost Object Config** object of your choice.

To navigate to **Cost Object Config**, click the App Launcher (☰) and select **Cost Object Config**.

NOTE: This may require minimizing the **All APPs** or scrolling to view **Cost Object Config**.

To populate the value of the **Filter Field**, use the **API Name** from one of your custom fields.

NOTE: The **Filter Field** formula must resolve to *true* or *false*.

Attendees from Salesforce Configuration

The Concur administrator and the Salesforce administrator determine which Expense fields and mapped Salesforce object fields the users should be able to use to search for attendees.

The following Expense attendee fields are not available for mapping:

- External ID
- Attendee Type
- Created By



For more information, refer to the *Choosing Salesforce Attendee Search Fields* section of this guide.

The Concur administrator must perform the following steps to allow the users to search in Salesforce for attendees:

- Configure an attendee form with the appropriate Expense fields, which will then be mapped to the Salesforce object fields. This includes:
 - ◆ Determining which existing Expense fields to map to the Salesforce object fields
 - ◆ Configuring custom fields to associate with the Salesforce object fields, if necessary
 - ◆ Assigning all the necessary fields to the attendee form.
- Create a new Attendee Type labeled Salesforce Attendees, with the Data Source = Concur Salesforce Connector, or modify the existing Connector attendee type.
- If attendee types are controlled by group, add the new attendee type to the appropriate groups.

NOTE: The Concur administrator can create multiple attendee types that use the Connector as a data source, if desired.

► To configure the attendee form fields:

The Concur administrator configures the attendee search page to include the selected Expense fields. Once the Concur administrator has chosen the Expense fields for mapping, the admin must complete the following steps:

- Determine which existing Expense fields should map to the Salesforce fields, and configure new fields if necessary. The following Expense attendee fields are not available for mapping:

- ◆ External ID
- ◆ Attendee Type
- ◆ Created By
- Add fields to the desired attendee form, if necessary. The administrator can also use the existing attendee form fields. In Concur, employees must have Modify rights to the form fields.
- (Optional) Remove any fields that will not be associated with Salesforce objects from the attendee form.



Refer to the *Expense: Forms and Fields Setup Guide* for more information on the form and field procedures.

► **To create the attendee type:**

1. Click **Administration > Expense**.
2. Click **Attendees** (left menu).
3. On the **Attendee Types** tab, click **New**. The **Attendee Type** window appears.

Attendee Type ✕

Attendee Type Name:

Attendee Type Code:

Expense Attendee Form:

Fields for duplicate search:

Data Source for Attendee Search:

Allow users to add attendees of this type: ☐

Allow users to edit the count for this type: ☐

4. Fill in the fields:

Field	Description
Attendee Type Name	Enter Salesforce Attendee.
Expense Attendee Form	Select the updated form, including the selected Expense fields to map to Salesforce object fields.
Fields for duplicate search	Select First Name, Last Name.
Data Source for Attendee Search	Select the name you used when creating the application connector.

Enter the other field information as required by the client's policy.

5. Click **Save**.

► **To add the new attendee type to a group:**

This step is only required if the client restricts attendee types by group.

1. Click **Administration > Expense**.

2. Click **Group Configurations** (left menu).
3. For the desired group, click **Modify** in the **Attendee Types** column.
4. Select (enable) the check box for the new attendee type.
5. Click **Save**.

The Salesforce administrator completes the field mapping in Salesforce once the attendee type configuration has been completed.



Refer to the *Configuring Attendee Search Fields* section of this guide.

Salesforce Configuration

The instructions in this section must be performed in Salesforce **after** the Concur Expense configuration is completed.

Configuring Attendee Search Fields

The first two steps of the configuration are complete:

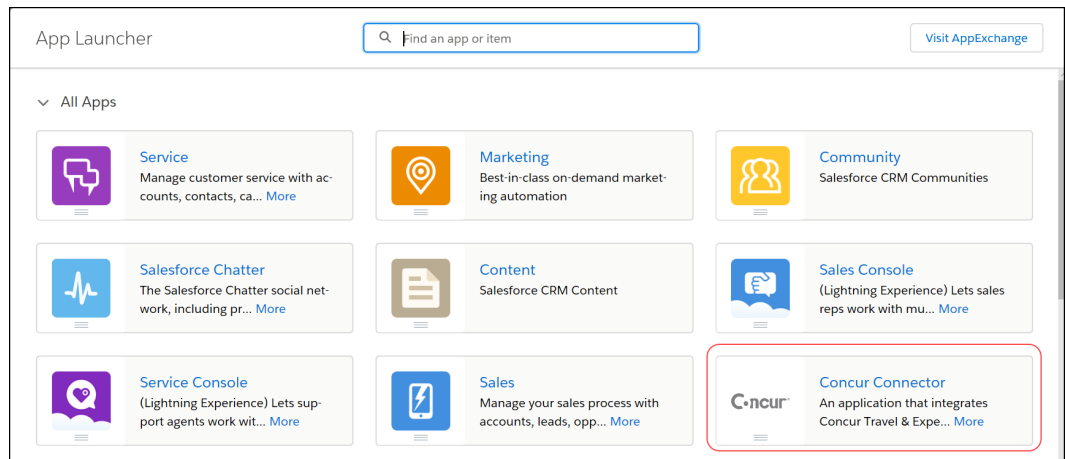
1. The Concur and Salesforce administrators selected the Expense and Salesforce object fields to use for Salesforce attendee searches in the *Choosing Salesforce Attendee Search Fields* step.
2. The Concur administrator configured the attendee search form and attendee type in Expense to include the necessary fields in the *Attendees from Salesforce Configuration* step.

The final step of the attendee configuration is completed on the **Concur Connector Admin Tools** page in Salesforce. The Salesforce administrator maps the fields on the Expense attendee form to the object fields in Salesforce.

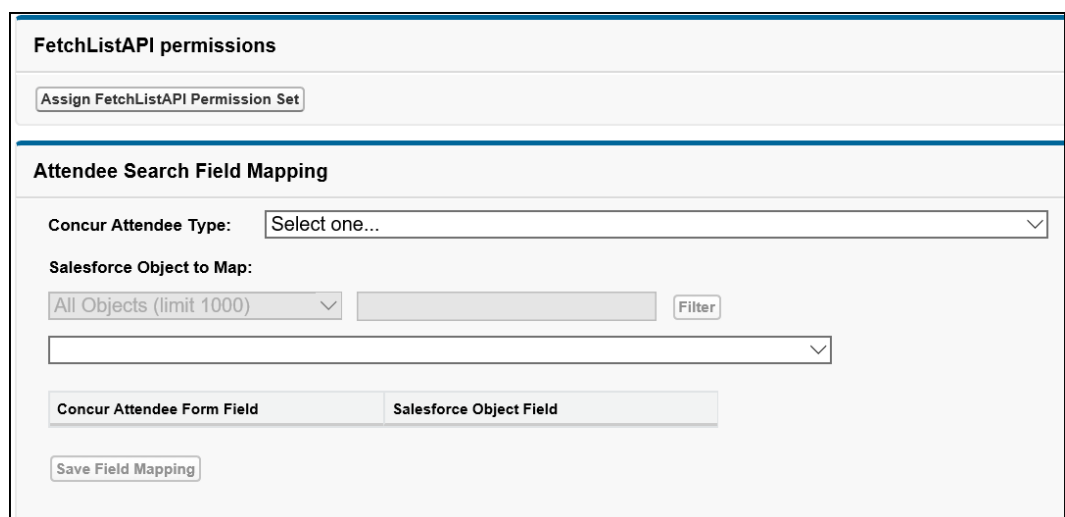
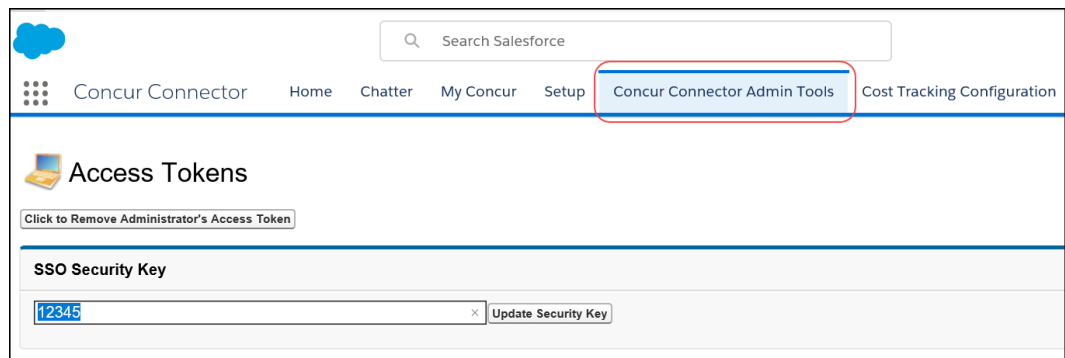
▶ ***To map the Salesforce Objects to the Expense Fields:***

1. Log in to Salesforce as an administrator.

2. Click the App Launcher (☰) and select **Concur Connector**.



3. Click **Concur Connector Admin Tools**.



4. In the **Attendee Search Field Mapping** section, fill in the fields:

Field	Description
Concur Attendee Type	Select the attendee type to configure. Only attendee types with the Concur Salesforce Connector Data Source will appear in the list.
Salesforce Object to Map	Select the type of Salesforce object to map. This will control which object fields are available for mapping.
Concur Attendee Form Field	This column contains all the fields on the attendee form for the selected attendee type. Fields that are required on the form are in red font.
Salesforce Object Field	Select the salesforce object field to map to the Expense field.

5. Click **Save Field Mapping**.

6. Repeat for each desired attendee type.

NOTE: Concur does not save Attendee expense details in Salesforce. Concur saves only the expense data for those objects configured for Cost Tracking in Concur.

Salesforce Reporting

Concur saves certain expense information in Salesforce for the objects configured in Cost Tracking. The Concur Salesforce Connector creates a report folder in Salesforce. The reports are then configured by the client or implementation to meet the particular needs of the client. The following report objects are available in Salesforce

for the Cost Tracking objects:

Object	Description
Accruing/Unpaid Expenses (amount)	The total expense amount in the organization's Corporate Currency for expenses charged to the Opportunity on expense reports that have not yet been extracted. This data is populated from Concur Expense when a user submits a report that includes a Salesforce opportunity.
Final/Paid Expenses (amount)	The total expense amount in the organization's Corporate Currency for expenses charged to the Opportunity on expense reports that have been extracted. This data is populated from Concur Expense when the system extracts a report that includes a Salesforce opportunity.

The following report objects are available only for the Opportunity object:

Object	Description
Accruing/Unpaid Expenses (percent)	The percentage the aggregate spend amount is of the Opportunity Amount (expected revenue in Corporate Currency). This data is calculated by dividing the Accruing/Unpaid Expenses (amount) by Opportunity Expected Revenue in the organization's Corporate Currency, times 100.
Final/Paid Expenses (percent)	The percentage the aggregate spend amount is of the Opportunity Amount (expected revenue). This data is calculated by dividing the Final/Paid Expenses (amount) by Opportunity Expected Revenue in the organization's Corporate Currency, times 100.

The totals are updated when the synchronization job runs, which is set to hourly at the 00 minute during installation. Administrators can make the job run more times per hour using the instructions in the *Scheduling Additional Synchronization Jobs* section of this guide.

Concur also saves the amounts in the Expense database, so you can use the Concur reporting tools to view them.

NOTE: Concur does not save Attendee expense details in Salesforce. Concur saves only the expense data for those objects configured when setting up Cost Tracking.

Section 6: Troubleshooting

Uninstalling the Connector

! IMPORTANT: When you uninstall the connector, it deletes all Concur data from the Salesforce organization. To upgrade to a new version, simply install the newest package and your connector will be updated to the latest version.

The connector functionality is disabled in two places:

- The Salesforce administrator uninstalls the managed package.
- The Expense Admin removes or disables:
 - ♦ Salesforce Contact attendee type
 - ♦ Salesforce fields used in Cost Tracking from all forms

Salesforce Uninstall

If you need to uninstall the connector, you will have to remove the Connector custom fields from the Cost Object page Layouts.

Refer to the *Adding the Connector Fields to the Page Layouts* section of this guide for steps to modify the Opportunity page.

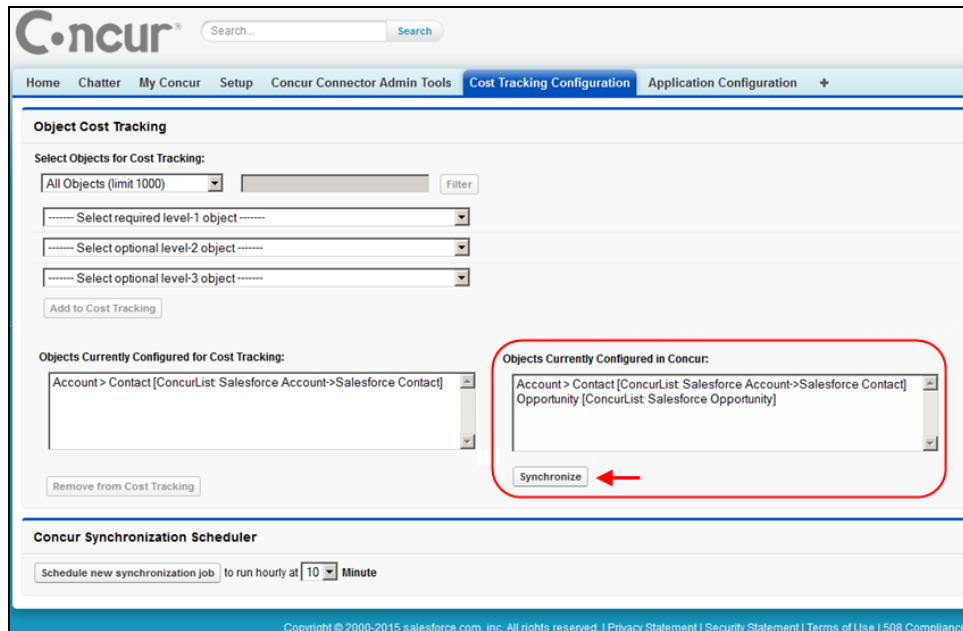
If you do not remove the custom fields from the layouts, you will receive an error during the uninstall process and will not be able to complete it.

Cost Tracking Configuration in Salesforce Must be Updated

When your Salesforce Cost Tracking configuration is out of sync with your Concur Cost Tracking configuration, the **Objects Currently Configured in Concur** area displays, along with a **Synchronize** button, on the **Cost Tracking Configuration** tab in Salesforce. You can use the **Synchronize** button to update your Salesforce organization configuration to match your Concur configuration.

► To sync Salesforce and Concur Cost Tracking configuration:

1. Log in to Salesforce as an admin.
2. From the application menu, select **Concur Connector**.
3. Click **Cost Tracking Configuration** (tab).

4. Click **Synchronize**.

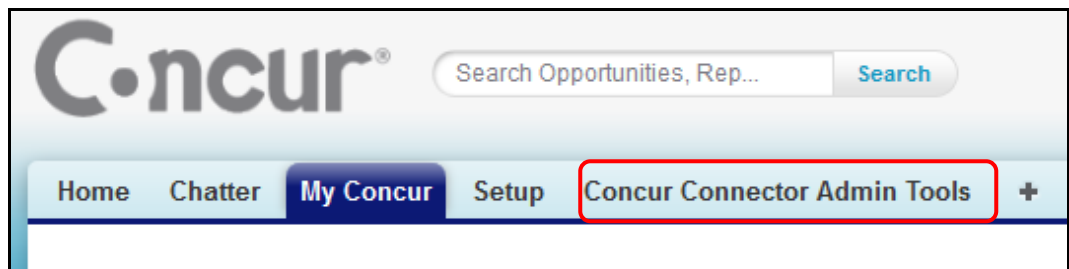
Salesforce Administrator Access Token Must be Updated

► To reset the authentication to Concur:

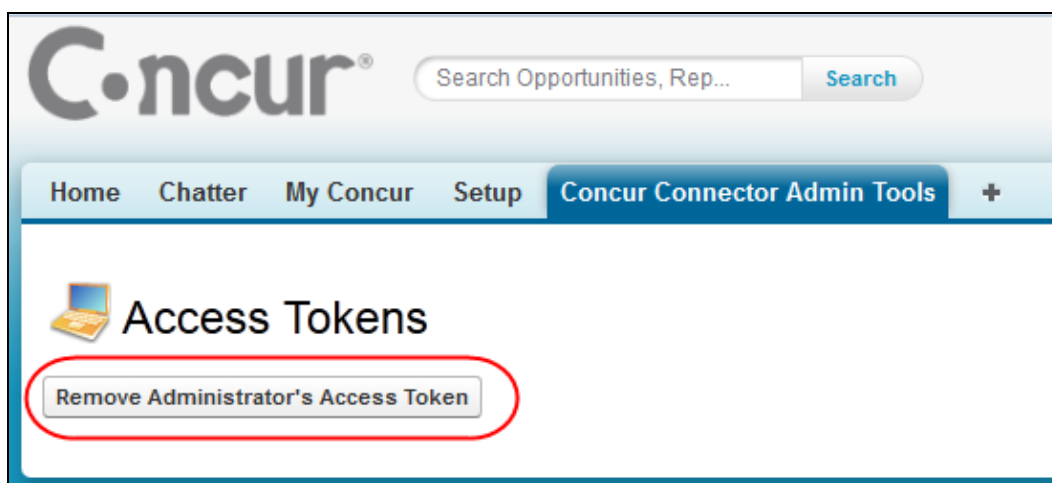
The authentication to Concur is managed in the **Concur Connector Admin Tools** tab. The following steps allow you to remove the existing authentication, in case of a mistaken login, or a package upgrade.

1. Log in to Salesforce as an admin.
2. Click the App Launcher (📌) and select **Concur Connector Admin Tools**.

NOTE: To minimize the **All Apps** view, click collapse (⌵).



3. Click **Remove Administrator's Access Token**.



The administrator's Concur login information is removed. The next time you access the **My Concur** tab, you will be taken through the setup process again.

Concur User Credential Must be Updated

Sometimes users choose the wrong Concur user account when authenticating to Concur. Follow these steps to clear the existing user account, so the user can begin the authentication process again.

The authentication to Concur is stored in the **OAuth Tokens** tab. The following steps allow you to verify or remove the existing authentication (in case of a mistaken login).

► **To reset the authentication to Concur:**

1. Log into Salesforce as an admin.

- Click the App Launcher (⚙️) and select **OAuth Tokens**.

NOTE: To minimize the **All Apps** view, click collapse (⌵).



Token Name	Is Access Token	Consumer Key	Consumer Secret
a07U0000005qoC5	✓	BluGjHntE5sC7QjSwMCa4jxE+oyk/NlQ/9gxoxe8o82P+AEdFQKNeBSCawB6qIk	NsQJacJumEQcim8HTYKGlouu08Y5XcW9y

The **OAuth Tokens** page appears.

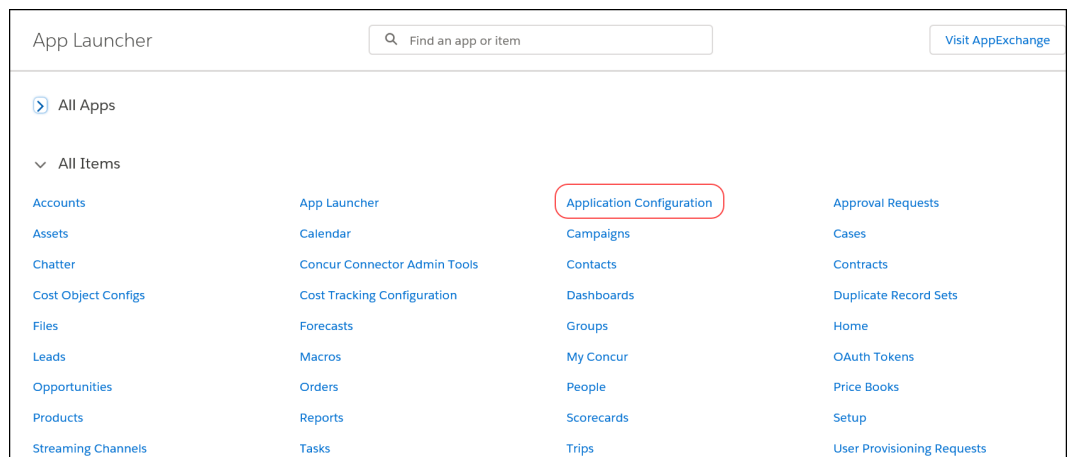
- If the user authenticated to Concur, a token will be listed on the page.
- To remove the token, click the token name.
- Click **Delete**. The next time the user accesses the My Concur tab, they will be prompted to log in to Concur again.

SSO Key Must be Updated

Some clients might need to update the SSO key that the connector uses, or add an SSO key to an existing Connector install. Once the SSO key has been obtained, follow the steps below to update it in the Salesforce Connector

- Log in as a Salesforce administrator.
- Click the App Launcher (⚙️) and select **Application Configuration**.

NOTE: To minimize the **All Apps** view, click collapse (⌵).

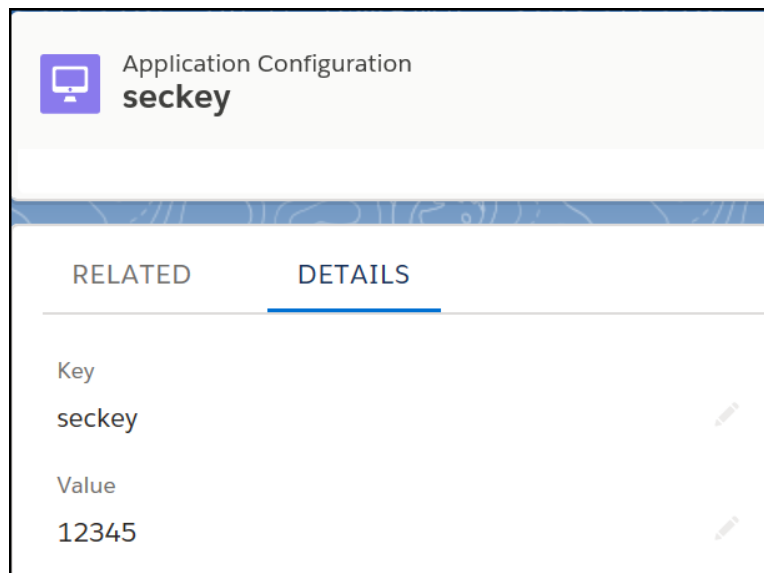


- Click **seckey**.



	KEY ↓	VALUE
1	seckey	12345

- Click **Edit**.



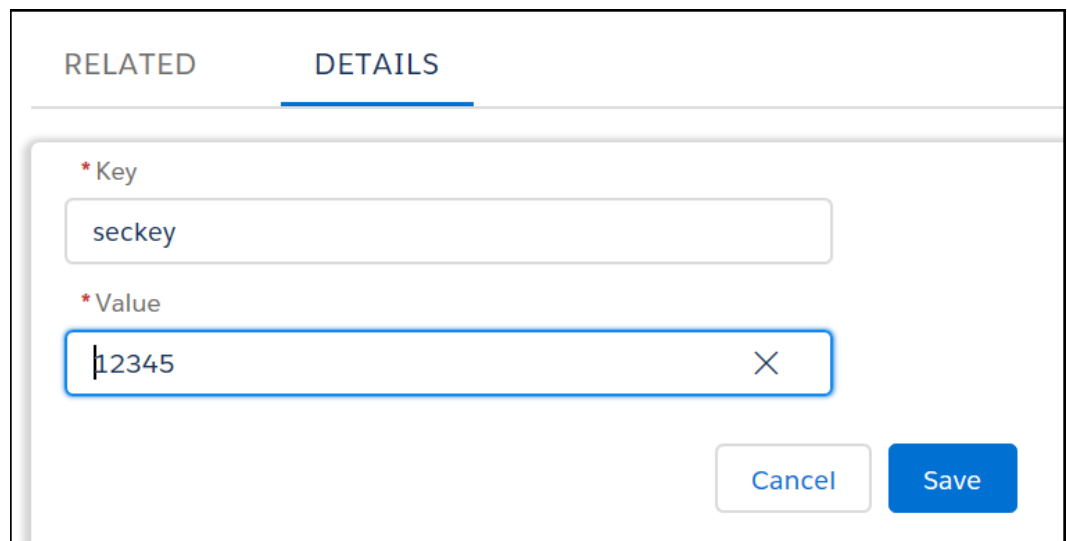
Application Configuration
seckey

RELATED DETAILS

Key
seckey

Value
12345

- In the **Value** field, paste the SSO Key provided to you by Concur.



RELATED DETAILS

* Key
seckey

* Value
12345

Cancel Save

- Click **Save**.

New User Profile Needs Access to Connector

The installation process for the connector involves setting security access for user profiles. As part of this process, you select user profiles that have access to the connector. Some clients need to add the connector permissions after the installation, either to an existing or new profile. If you create new user profiles after the installation, the recommended method is to clone the Concur Connector Standard User profile. If you can't clone the existing profile, you will need to update the new profile to provide access to the connector. This process is completed by comparing the settings for the Concur Connector Standard User profile with the settings for the new profile, and updating the new profile as appropriate.

► **To update the new profile to access the connector:**

1. Go to **Setup > Manage Users > Profiles**.
2. Right click the name of the new profile and choose **Open in new window** or **Open in new tab**. You will update this profile to match the existing profiles.
3. In the main window, click the name of a profile that you configured to use the connector during the installation.

! **IMPORTANT:** Do not click the **Edit** button, as it shows a smaller set of options that does not include all the required sections.

The default profiles are Concur Connector Salesforce User and Concur Connector Salesforce Platform User, but your configuration may vary.

4. Scroll to the **Field Level Security > Custom Field Level Security** section.
5. Click **View** for the first field in this section on the existing profile.
6. Click **View > Edit** for the first field on the new profile.
7. Update the new profile to match the existing profile.
8. Repeat steps 5-7 for each field under the **Custom Field Level Security** section.
9. Scroll down to the **Enabled Apex Class Access** section.
10. Click **Edit**.
11. Update the new profile to match the settings for the existing profile.
12. Click **Edit** (top menu) for both profiles.
13. In the **Custom App Settings** section, update the new profile to match the existing profile.
14. In the **Tab Settings > Custom Tab Settings** section, update the new profile to match the existing profile.

15. In the **Custom Object Permissions** section, update the new profile to match the existing profile.
16. Click **Save** on the new profile.

Cost Object Spend Totals Are Not Updating

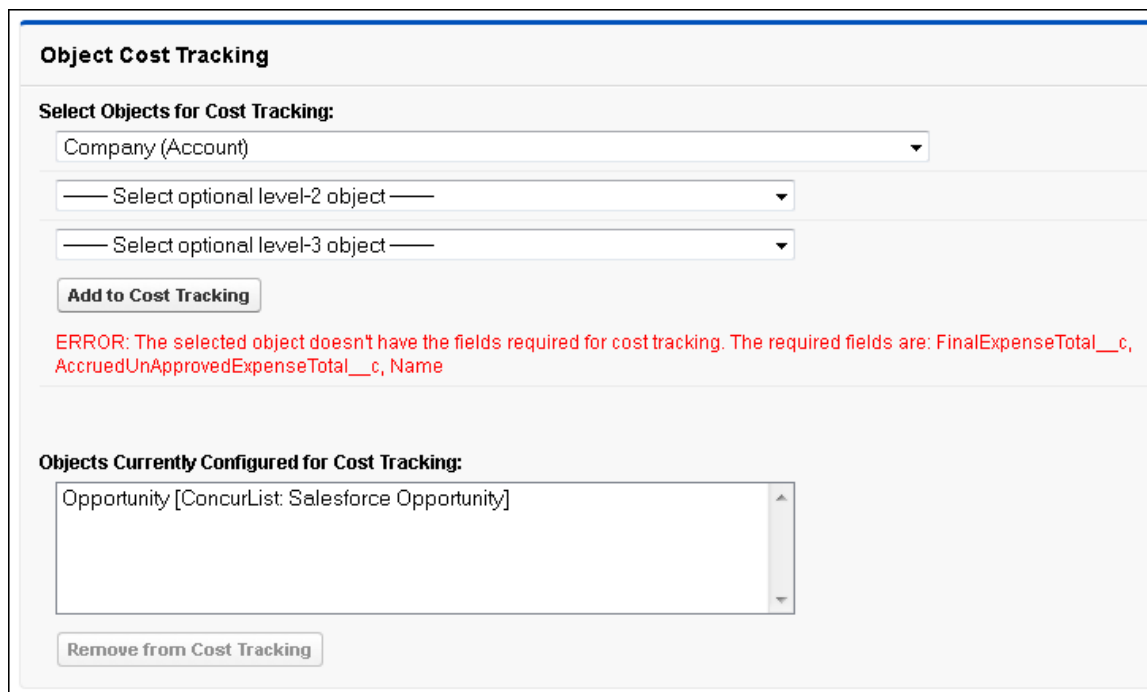
► To view job errors:

1. Click the gears (⚙) > **Setup**. The Salesforce Home tab appears.
2. Under Platform Tools, click Objects and Fields>→Object Manager. The Setup Object Manager Displays.
3. Click **Setup > Jobs> Apex Jobs**.
4. Select the number in the **Failures** column for the job.
5. Use this information to determine the error.

Error in Cost Object Tracking - Missing Required Fields

If you receive the following error on the **Cost Tracking Configuration** page, **Object Cost Tracking** section after selecting an object (**Add to Cost Tracking**):

ERROR: The selected object doesn't have the fields required for cost tracking. The required fields are: FinalExpenseTotal__c, AccruedUnApprovedExpenseTotal__c



The screenshot shows the 'Object Cost Tracking' configuration page. It has a title bar 'Object Cost Tracking'. Below it is a section 'Select Objects for Cost Tracking:' with three dropdown menus. The first dropdown is set to 'Company (Account)'. The second and third dropdowns are set to 'Select optional level-2 object' and 'Select optional level-3 object' respectively. Below these is a button 'Add to Cost Tracking'. A red error message is displayed: 'ERROR: The selected object doesn't have the fields required for cost tracking. The required fields are: FinalExpenseTotal__c, AccruedUnApprovedExpenseTotal__c, Name'. Below the error message is a section 'Objects Currently Configured for Cost Tracking:' with a list box containing 'Opportunity [ConcurList: Salesforce Opportunity]'. At the bottom is a button 'Remove from Cost Tracking'.

Then you have missed a configuration step. You must complete the configuration documented in the *Adding Objects to Cost Tracking* section of this guide. Then return to the **Concur Connector Admin Tools** page to continue the Object Cost Tracking configuration.

Error in Cost Object Tracking – Query Cannot be Dynamically Created

If you receive the following error on the **Cost Tracking Configuration** page, **Object Cost Tracking** section after clicking **Add to Cost Tracking**:

ERROR: After double-checking a relationship you selected (Object1-Object2) it appears a query cannot be dynamically created. Please verify the relationship and access in Salesforce and try again.

The screenshot shows the Concur web interface. At the top is the Concur logo and a search bar. Below is a navigation bar with links: Home, Chatter, My Concur, Setup, Concur Connector Admin Tools, and Cost Tracking Configuration (which is highlighted). The main content area is titled "Object Cost Tracking". It contains a section "Select Objects for Cost Tracking:" with a dropdown menu set to "All Objects (limit 1000)" and a "Filter" button. Below this are three rows of object and field selection: "Case (Case)" with "Case Number", "Contract (Contract)" with "Contract Name", and a placeholder "----- Select optional level-3 object -----". An "Add to Cost Tracking" button is present. Below the button, a red error message is displayed: "ERROR: After double-checking a relationship you selected (Case-Contract) it appears a query cannot be dynamically created. Please verify the relationship and access in Salesforce and try again." Below the error message is a section titled "Objects Currently Configured for Cost Tracking:" which contains a list of configured relationships: "Account > Contact [ConcurList: Salesforce Account->Salesforce Contact]" and "Opportunity [ConcurList: Salesforce Opportunity]". A "Remove from Cost Tracking" button is at the bottom of this section. The bottom of the page features a "Concur Synchronization Scheduler" section with a "Schedule new synchronization job" button and a dropdown set to "25 Minute".

Then you might have one of the following issues:

- You have selected an object that you do not have access rights for.
- The lookup relationship between the parent and child object is not correctly established.

If either of these issues is occurring, contact Concur Client Support.

Object Cost Tracking

Select Objects for Cost Tracking: All Objects (limit 1000) ⌵ Filter

Case (Case) ⌵

Case Number ⌵

Contract (Contract) ⌵

Contract Name ⌵

----- Select optional level-3 object ----- ⌵

⌵

Add to Cost Tracking

ERROR: After double-checking a relationship you selected (Case-Contract) it appears a query cannot be dynamically created. Please verify the relationship and access in Salesforce and try again.

Objects Currently Configured for Cost Tracking:

Account > Contact [ConcurList: Salesforce Account->Salesforce Contact]
Opportunity [ConcurList: Salesforce Opportunity]

Remove from Cost Tracking

Concur Synchronization Scheduler

Schedule new synchronization job to run hourly at 25 ⌵ Minute

Known Issue: Opportunity List Only Shows One Opportunity

If a user selects a value in the Salesforce Opportunity field, then saves their expense entry, their Salesforce Opportunity list may begin to show only the selected Opportunity.

This known issue can be worked around by clearing the Salesforce Opportunity field and saving the expense entry. If the entry has been deleted, the user can create a new entry, select the one Opportunity, save the entry, then clear the Salesforce Opportunity and save the entry again.

Once the user has saved the entry with the Salesforce Opportunity field empty, the Salesforce Opportunity list should begin showing the full list of available Opportunities again.

Section 7: Appendix

Salesforce Objects Not Available for Cost Tracking

Objects from a Managed package.

AND

Certain Salesforce standard objects are not available to use in Cost Tracking Configuration:

- Any **Share** object based on Standard or Custom objects. These objects are special objects related to sharing records in Salesforce. Examples: AccountShare, CampaignShare, OpportunityShare
- Any **History** object based on Standard or Custom objects. These objects are special objects supporting historical tracking of data in Salesforce. Examples: AccountHistory, ActivityHistory, OpportunityHistory
- Any **Feed** object based on Standard or Custom objects. These objects are special objects supporting Chatter in Salesforce. Examples: AccountFeed, AssetFeed, FeedComment
- Any **Objects** in the following table:

Excluded Salesforce Standard Objects	
CaseTeamTemplateRecord	Note
CategoryData	NoteAndAttachment
CategoryNode	ObjectPermissions
CategoryNodeLocalization	OpportunityCompetitor
ChatterActivity	OpportunityContactRole
ClientBrowser	OpportunityLineItem
CollaborationGroupMember	OpportunityPartner
CollaborationGroupMemberRequest	OpportunityStage
CollaborationInvitation	OpportunityTeamMember
Community	OrderItem
ContentDocument	Organization
ContentDocumentLink	OrgWideEmailAddress
ContentVersion	Partner
ContentWorkspaceDoc	PartnerRole
ContractContactRole	Period
ContractStatus	PermissionSet
CronTrigger	PermissionSetAssignment

Excluded Salesforce Standard Objects	
CustomConsoleComponent	ProcessInstance
Dashboard	ProcessInstanceStep
DashboardComponent	ProcessInstanceWorkitem
DocumentAttachmentMap	Profile
Domain	PushTopic
DomainSite	QueueSubject
EmailServicesAddress	RecentlyViewed
EmailServicesFunction	RecordType
EmailStatus	RecordTypeLocalization
EmailTemplate	Report
EntitySubscription	SControlLocalization
EventRelation	SetupEntityAccess
FeedComment	Site
FeedItem	SolutionStatus
FeedLike	StaticResource
FeedTrackedChange	Task
FieldPermissions	TaskPriority
FiscalYearSettings	TaskStatus
Folder	TenantUsageEntitlement
Group	Topic
GroupMember	TopicAssignment
HashtagDefinition	UserLicense
Holiday	UserPreference
IdeaComment	UserRecordAccess
LeadStatus	UserTeamMember
LoginIp	Vote
MailmergeTemplate	WebLink
Name	WebLinkLocalization

