

# **Invoice: PO and PO Receipt Import Now Specification**

**Last Revised: March 23, 2021**

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



# Table of Contents

- PO and PO Receipt Import Now.....1**
  - Section 1: Permissions.....1**
  - Section 2: Introduction.....1**
  - Section 3: Configuration .....2**
    - Current Import Naming Convention .....2
    - Import Now Naming Convention .....2

# Revision History

Date	Notes/Comments/Changes
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
March 23, 2021	Added EMEA as a supported data center.
February 24, 2021	Updated the copyright year; no other changes; cover date not updated
September 8, 2020	Added information about clients receiving email notification after import now file has been processed.
April 20, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 8, 2020	Updated the copyright; no other changes; cover date not updated
August 27, 2019	Added the Permissions section
August 17, 2019	Added note that the feature is only available to clients in the North America Data Center.
June 24, 2019	New document.

# PO and PO Receipt Import Now

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

## Section 1: Permissions

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

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

## Section 2: Introduction

SAP Concur now enables clients to trigger an immediate import of POs and PO receipts via their FTP site with an Import Now naming convention instead of having to wait for it to run on their normal nightly schedule. This is beneficial for clients who need to import POs and PO receipts and work with them in the Concur Invoice product the same day they are created externally. Clients can also import multiple batches of POs and goods receipts within a day for more real-time data synchronization with their external PO system and SAP Concur.

The existing nightly imports for PO, PO Receipt, and all the other imports will still be supported. The Import Now option can replace the need to rely on nightly imports for PO and goods receipts or just supplement it.

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**NOTE:** Clients must have an FTP site with SAP Concur to use this feature.

**NOTE:** This feature is currently available to clients deployed to the North America and EMEA Data Centers.

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Clients with the Import/Extract Monitor role will receive an email notification once the Import Now file has been processed with status information about the import.

Please note that the Vendor Import is still only available on a nightly schedule. This means that vendors may not exist for some POs, and, therefore, fail to import if vendors are added and POs generated for the new vendors the same day in the external system.

Today, many Concur Invoice clients have external purchasing or procurement systems for ordering goods and services and for receiving against purchase orders. These clients need these records to be available in Concur Invoice, so that when the related invoice comes into Concur Invoice, they can take advantage of the invoice automation tools and two- or three-way automatic PO to invoice matching that the system performs. The Import Now feature makes it possible to get these PO and PO receipt details into Concur Invoice on a flexible client-driven frequency to ensure synchronization of this data in both systems as needed.

## Section 3: Configuration

This feature is automatically on. To start using this feature, clients need to add the suffix "importnow" on their PO and PO receipt files that are transferred to their FTP.

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**NOTE:** Clients must have an FTP site and be deployed to the North America or EMEA Data Center to use this feature.

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### Current Import Naming Convention

The current naming convention is the following:

- PO import: poinvoice\_EntityID\_Date
- PO Receipt Import: purch\_receipt\_EntityID\_Date

These naming conventions will remain as is today and the files will continue to be picked up and run on the existing nightly schedule setup. Clients who wish to always import these records using the import now option should adjust their nightly schedules accordingly and remove the purchase order and purchase order receipt import tasks from the schedule setup.

### Import Now Naming Convention

The Import Now naming convention is the following:

- PO Import: poinvoiceimportnow\_EntityID\_Date
- PO Receipt Import: purch\_receiptimportnow\_EntityID\_Date

For the Import Now option, the PO receipt file is usually dependent on the PO file, so clients need to coordinate their file transfer to the FTP so that the PO file is always transferred first before the PO receipt file to ensure the POs are imported before the receipts. The PO receipt Import Now function will not start until any active PO import running is completed. However, once the PO files are sent with the "importnow" suffix, they will be imported immediately when they are transferred to FTP.



For more information about purchase order and purchase order receipt imports, refer to the *Invoice: Purchase Order Import Specification* and *Invoice: Purchase Order Receipt Import V2 (Quantity Receipt for Three-Way Matching) Specification*.

