SAP Concur Release Notes

Concur Invoice Professional/Premium

Includes: Concur Invoice, Capture Processing, Invoice Pay, Purchase Requests and Purchase Orders

Month	Audience
Release Date: January 20, 2024 Initial Post: January 20, 2024	Client ***FINAL***

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Release Notes

This document contains the release notes for Concur Invoice for professional edition.

NOTE: Features and changes that apply to SAP Concur site-wide or to multiple products/services are documented in the *Shared Changes Release Notes*. For information about site-wide or shared changes in this release that might impact your SAP Concur solutions, refer to the *Shared Changes Release Notes*.

Concur Invoice UX Evolution

Ongoing Updated User Interface (UI) for Concur Invoice End Users

Information First Published	Information Last Modified	Automatic Transition Date
July 14, 2023	January 19, 2024	To Be Determined
Any changes since the previous monthly release are highlighted in yellow in this release note.		

This change is part of the Concur Invoice UX Evolution experience.

Overview

The continued evolution of the Concur Invoice solution user interface (UI) experience is the result of thoughtful design and research that provides a modern, intuitive, and streamlined experience for the invoice process.

Customers will have the ability to preview and then opt in to the new UI for Concur Invoice before the automatic transition date.

BUSINESS PURPOSE / CLIENT BENEFIT

The result is the evolution of the Concur Invoice user interface designed to provide a modern, consistent, and streamlined user experience. The new UI focuses on consistency across SAP Concur Spend offerings, and includes several significant enhancements requested by clients. Focus areas include end-user efficiency when interacting with invoices, performance and stability, as well as accessibility compliance.

Products and Users Affected

To take advantage of these improvements, Concur Invoice customers will be required to transition to the new UI at a future date to be determined. The following sections provide information about the timeline and resources available to ensure this process is smooth and efficient for all users.

The new UI changes apply to:

- Concur Invoice (Professional/Premium and Standard) end users only

IMPORTANT: Timeline and Milestones

There are four important milestones for Concur Invoice customers as they transition from the current UI to the new UI.

1. **Early Adopter Care (EAC) Period**: August 2023 – Ongoing in 2024

   We are currently in the Early Adopter Care Period: During this time, the new UI is available to preview for customers participating in the Early Adopter Care Program. We encourage administrators and power users to use the Early Adopter Care Period to preview the refreshed interface, update internal training materials, and prepare the organization for the transition.

   NOTE: During the Early Adopter Care Period, not all planned features from the current UI will be available in new UI for Concur Invoice. New features and enhancements continue to be planned for future releases. ***The Early Adopter Care Period is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

   If your organization is interesting in participating in the Early Adopter Care Program, please refer to the SAP Early Adopter Care page for more information.

2. **Opt-In Period:** Targeted for Q2 2024

   Following the Early Adopter Care Period there will be an open Opt-In Period. This milestone will be marked by the delivery of most planned features as well as further overall product quality and stability. The Opt-In Period will be available to all Concur Invoice customers.

   Customers should use this period to plan their transition and move to the new UI for Concur Invoice when it is right for your business priorities. Some remaining features will become available throughout this period, so customers should plan their roll out accordingly.

3. **Active Move Period:** To be determined

   All customers will be required to move to the new UI. The first day of the Active Move Period is the first day of the 12-month notice period we committed to for customers to complete the transition at their own pace before the automatic transition date.

   Customers are strongly encouraged to complete the tasks necessary to ensure a smooth transition for their organization and then transition during the Active Move Period.

4. **Automatic Transition Date:** To be determined

   All customers will be automatically transitioned to the new UI. This ensures that we continue to offer a consistent user experience for all customers and allows for superior product innovation and support.

Transition Information – Guides and Other Resources

We will provide guide updates, online help updates, release notes, and other resources to help in the transition.

Examples of where to find information about the new UI:

- **Setup and user guides, FAQs, transition resources:** During the transition from the current UI to the new UI, the Concur Invoice setup and user guides will be updated to include information about the new UI in addition to the current UI.
  Along with the guide updates, there are other resources (such as an FAQ), and a list of features that are not yet available in the new UI. All these materials can be used to help customers prepare their users.
- **SAP Help Portal:** Concur Invoice topics will also be updated for the new UI in the Concur Invoice | SAP Help Portal. During the transition from the current UI to the new UI, the topics will include information about the current UI and the new UI.
- **Release information:** Release notes for enhancements associated with the new UI will be provided in the monthly Concur Invoice release notes. Release notes for the new UI will be clearly marked in the monthly release notes.

Get Started

Customers are encouraged to use the transition information described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

Feature Availability

The Invoice UX Evolution user interface will be applied to specific Concur Invoice features in a phased approach during the Early Adopter and Opt-In milestones. There are some Concur Invoice features that the Invoice UX Evolution user interface will not be applied to during the Early Adopter or Opt-In milestones.

Use the following table to view which Concur Invoice features are currently updated with the Invoice UX Evolution user interface. The table also indicates whether a feature is a major or minor feature and which features will not be updated with the new user interface.

NOTE: Clients using the major features listed in the Major Features section of the table should ***not*** move to the Invoice UX Evolution UI until the major features they are using are available in the Invoice UX Evolution UI.

Feature Availability for Invoice UX Evolution		
Feature Name	**Available?**	**Notes**
Major Features		
Attendees	No	Parity Professional Only
Auto-Save	Early Adopter Care (EAC) Period	New Professional | Standard
CFDI (Comprobantes Fiscal Digital por Internet) (Mexico)	No	Parity Professional | Standard
Create/Edit Invoice	EAC	Parity – with the new create and edit invoice workflow Professional | Standard
E-Bunsho	No	Parity Professional | Standard
Editing Allocations	No	Parity Professional | Standard
Expense Type Connected List	No	Parity Professional Only
Greater than 15 Line Items can be added in the Itemization section on the Create New Invoices page	No	New Professional | Standard
Line-Item Entry in the Itemization section on the Create New Invoices page	EAC	New Professional | Standard
Multiple VAT Field Support (Canada)	No	Parity Professional | Standard
PO Matching	No	Parity Professional | Standard
Recurring Invoices	EAC	Parity Professional | Standard
Tax Authority & Tax Validation Service	No	Parity Professional | Standard

Minor Features		
Auto Resize – View Port	EAC	New Professional | Standard
Default Image In Line	EAC	Parity Professional | Standard
Drag and Drop Images	EAC	New Professional | Standard
Enhanced Comments	EAC	Parity Professional | Standard
Enhanced Bulk Update Tools	No	Some Parity Professional | Standard
Invoice Owner Improvements	EAC	Parity – with new workflow Professional | Standard
Line-Item Entry Improvements – Custom Fields	EAC	Parity – with new workflow Professional | Standard
Submit/Assign Button Improvements	EAC	Parity – with new workflow Professional | Standard
Unassigned Invoices List screen – Record Locking	EAC	New Professional | Standard
VAT Tax Mode	EAC	Parity – with new workflow Professional | Standard
Switch Tax Mode Improvements	EAC	Parity – with new workflow Professional | Standard
Processor navigation to invoices in new UI	No	Parity – with new workflow Professional | Standard
Approver navigation to invoices in new UI	No	Parity – with new workflow Professional | Standard
Other Minor Parity Features	No	Parity Professional | Standard
Features that will not have the Invoice UX Evolution User Interface		
Concur Invoice Administration	No	
Approvals Invoice List	No	
Capture Processing	No	
Invoice Pay	No	
Processor Invoice List	No	

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

NOTE: The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the *Shared Changes Release Notes*.

Invoice Pay

Planned Changes New Invoice Virtual Card Payments (BMO only)

Information First Published	Information Last Modified	Feature Target Release Date
March 2023	--	Q1 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Concur Invoice clients contracted for Invoice Payment Manager and that use Bank of Montreal (BMO) corporate credit cards will soon be able to make payments to vendors using a new payment type for virtual cards. Invoice Payment Managers will be able to create Virtual Card Accounts to set up and manage virtual card batches and payments for selected vendors. Invoices with a virtual card payment method type will be created and approved in Concur Invoice the same way as invoices with other payment methods. Payments will be facilitated by a third-party company (payment provider) instead of SAP Concur.

Invoice Virtual Card Pay includes the following benefits:

- Improved working capital by paying vendors with a virtual card now and the credit card statement with the settled payments later
- Faster and more secure payments to vendors
- Possible rebate incentives from issuer for corporate card programs
- Virtual card functionality added to Invoice Payment Manager, ensuring visibility to all payment methods in a single interface

Invoice virtual card payments will initially support Single Use Virtual Cards. Single Use Virtual Cards can only be successfully charged once by a vendor for the exact amount the virtual card was issued for. After the transaction settles the virtual card is automatically closed and cannot be used again. A new single use virtual card will be issued for each payment to a vendor.

After a virtual card payment batch is closed, a remittance email is sent to the vendor contact email in Concur Invoice. The body of the email will contain the authorized

payment amount, list of invoices being paid, and a link with instructions to access the virtual card from the payment provider. From the link the vendor can view the details of the virtual card to charge it in their point-of-sale system.

From Invoice Payment Manager, clients can configure the number of days a virtual card will remain active and can be charged after being issued. If a vendor does not charge the virtual card within the set **Days to Expiration**, it will expire and cannot be charged. Invoice Payment Manager users can also cancel virtual cards before they are charged. Expired and canceled payments can be managed and reissued in the same or different form of payment.

Invoice virtual card payments can be extracted for GL posting with the Payment Confirmation Extract file or Invoice Payment Confirmation API after the virtual card is issued. After a vendor charges the card, the date the transaction settles on the credit card will be recorded with the payment in Concur Invoice and reportable for reconciliations.

NOTE: Concur mobile app functionality is not included.

NOTE: In a future release, this feature is planned for all Concur Invoice Payment Manager clients who use Bank of Montreal corporate credit cards.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides clients with flexibility and a simple setup solution for issuing virtual cards as a form of payment to vendors.

Prerequisites

Clients must work with their vendors to determine whether they accept virtual cards as a form of payment. If so, the virtual card payment methods can be assigned to vendor records to default to a virtual card payment method.

Clients must have Concur Invoice and Invoice Payment Manager on their contract.

Currency and Country Availability

- **Currency:** USD only
- **Country:** United States and United States territories

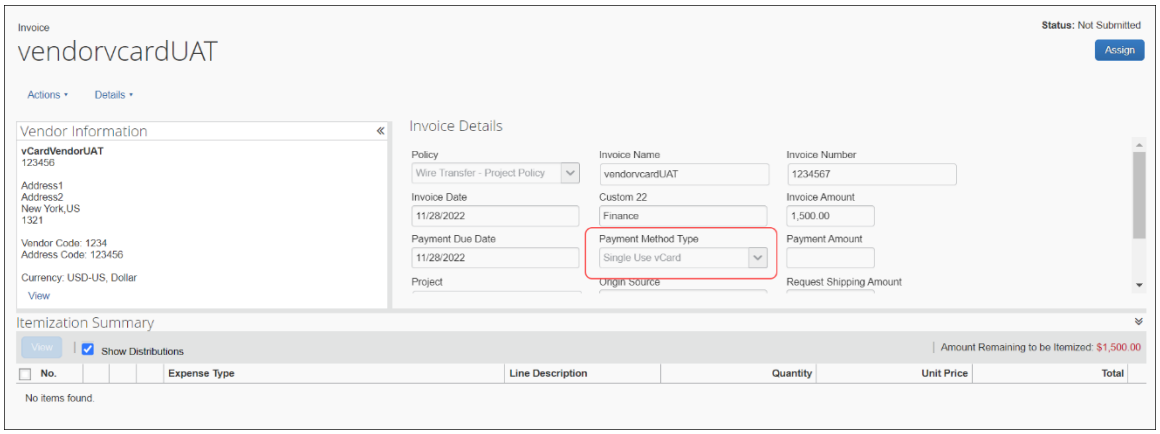
Roles

Users must have the Invoice Payment Manager role to manage and configure virtual cards.

End-User Experience

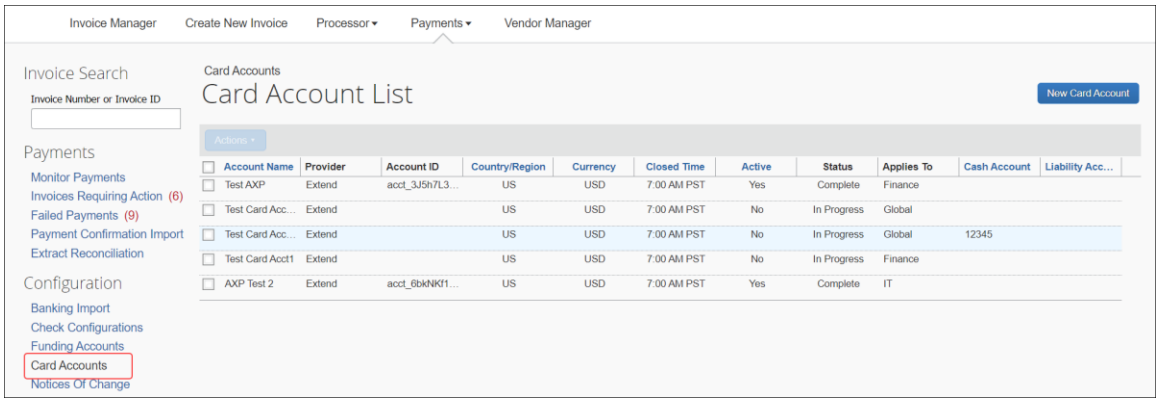
INVOICE OWNER

Users will see *Single Use Card* selected as the payment method for the invoice.



INVOICE PAYMENT MANAGER

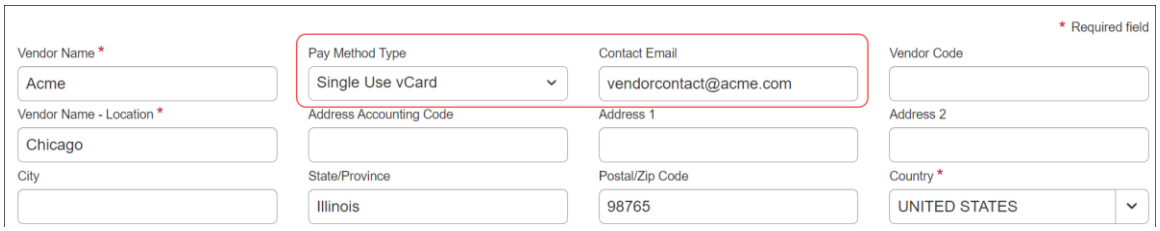
Invoice Payment Managers will see a new **Card Account List** page in Payment Manager under **Configuration**. The **Card Account List** page will be used to configure the virtual card account and activate it once the payment partner has reviewed and completed set up and the card issuer has finalized card registration.



VENDOR MANAGER

Once card accounts are configured, Vendor Managers will need to update vendor records for vendors who accept virtual card payments.

In the **Pay Method Type** list for the vendor profile, the new *Single Use vCard* option will display and must be selected for all new invoices to default to this assigned payment method.



The **Contact Email** field in the vendor profile must be completed and verified for vendors to receive a remittance email with a link to the virtual card.

Configuration / Feature Activation

If your company is interested in using the Virtual Card Pay feature, contact your SAP Concur representative to request support services for feature activation.

📖 For more information, refer to the *Concur Invoice: Invoice Pay Setup Guide* and *Concur Invoice: Invoice Pay User Guide*.

Vendor Management

Planned Changes SAP Business Partner Screening Solution Now Performs Automatic Online Screening

Information First Published	Information Last Modified	Feature Target Release Date
December 2023	January 19, 2024	Q1 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

SAP Concur now performs automatic online screening of vendors (suppliers) within Concur Invoice Vendor Management using the SAP Business Partner Screening (BPS) solution. Previously, SAP Concur performed offline screening of vendors (suppliers) within Concur Invoice Vendor Management using the SAP Business Partner Screening (BPS) solution.

For more information, refer to the *Vendor Management | SAP Business Partner Screening Solution (August 11)* release note published in the *Concur Invoice Release Notes* for August 2023.

The BPS solution is used to prevent prohibited vendors in embargoed countries or regions, or in sanctioned entities listed by the various applicable government agencies, from performing business activities with SAP products.

SAP policy prohibits the use of all SAP products and services in, from, or in support of, any business activities in locations where SAP products and services are not available. This list includes Cuba (CU), Iran (IR), North Korea (KP), Syria (SY), and regions of the Ukraine (Donestsk, Luhansk, and Crimea). This change also impacts the following currencies Cuba, Peso (CUC and CUP); North Korean Won (KPW); Syria, Pound (SYP); Iran, Rial (IRR).

When users try to submit an invoice for vendors that are identified as having a Sanctioned or Invalid status during BPS screening, invoice submission will be blocked. Only invoices for vendors that passed BPS screening will be extracted to the financial system for payment.

With the release of the new automatic online screening update, this feature release also includes:

- Four new screening statuses in the **Screening Status** column on the **Vendor Managers** page
- A new *Screening Status* option in the **Search** list on the **Manage Vendors** page
- The ability to recall invoices for re-screening
- New alert messages for vendor invoice status during BPS screening
- Audit trail tracking of Export Trade Sanctions (ETS) categories, status codes, and screening statuses

- The ability to block submission of purchase requests (PR) and purchase orders (PO) for vendors with a Sanctioned or Invalid status during BPS Screening.

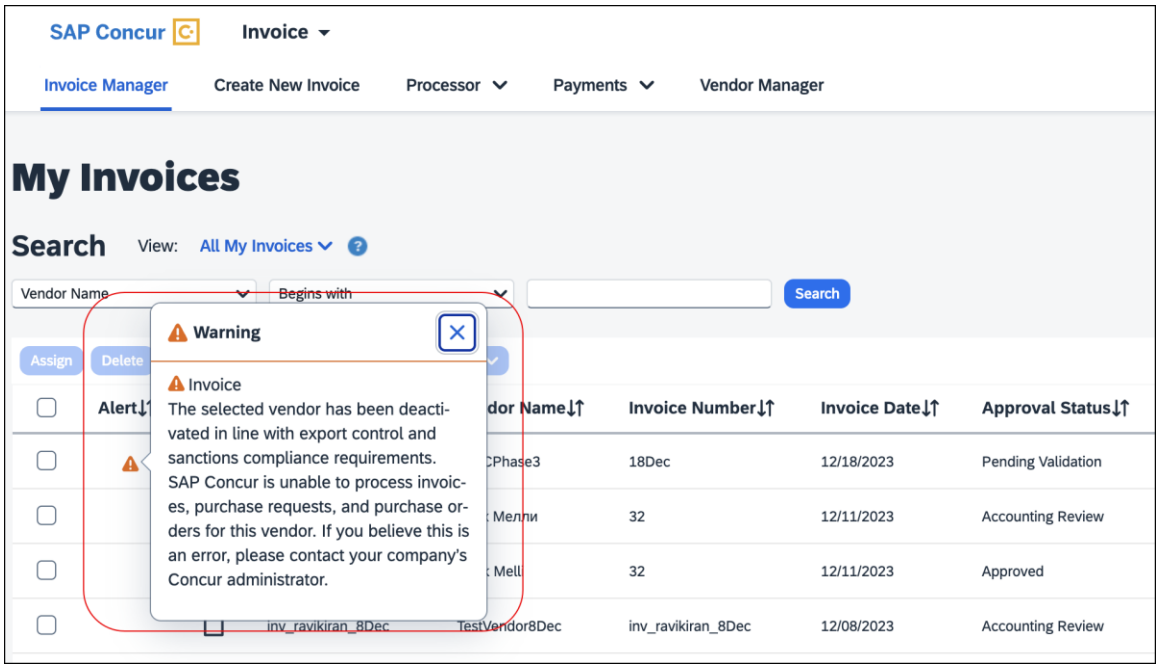
BUSINESS PURPOSE / CLIENT BENEFIT

This change ensures clients follow local, national, and international laws governing embargoed countries and sanctioned individuals/entities and are systematically protected to the best ability from malicious actors and actions when working with SAP Concur products.

End User Experience

VIEW ALERT MESSAGES

After invoice submission, users now see additional alerts displayed on the **My Invoices** page in **Invoice Manager** to track vendor invoices during BPS screening status.



Alerts that may display include:

- **Sanctioned:** *The selected vendor has been deactivated in line with SAP Export Control and Sanctions Compliance requirements. SAP Concur is unable to process invoices, purchase requests, and purchase orders for this vendor. If you believe this is an error, please contact your company's Concur administrator.*
- **Pending Review:** *The selected vendor in this invoice is currently under review as part of SAP's Export Control and Sanctions Compliance policy. We appreciate your patience as we are processing your request as quickly as possible.*
- **System Pending:** *The selected vendor in this invoice is currently under review as part of SAP's Export Control and Sanctions Compliance policy. We*

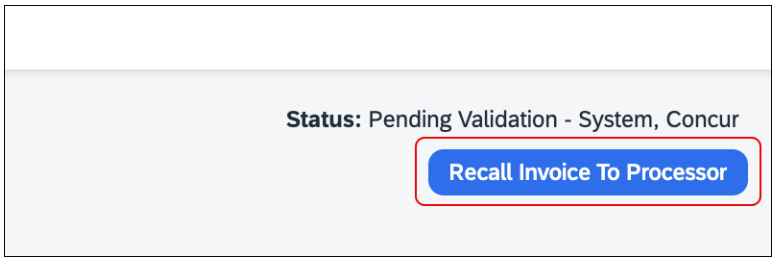
appreciate your patience as we are processing your request as quickly as possible.

- **Invalid:** *At this time, SAP Concur is unable to support the selected vendor as the information appears incomplete or inaccurate. Please ensure the full legal name of the company or individual and their full address (street, city, state (if applicable), and country/region) are complete and accurate in the vendor record.*

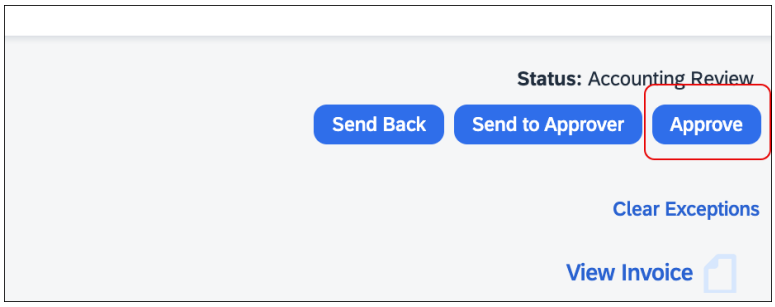
RECALL INVOICES FOR RE-SCREENING

If the vendor does not pass the BPS screening at the Prepayment Validation state, invoices with the vendor are placed on hold and an alert message displays for the invoice. Users can recall the invoice to the processor and approve it to initiate re-screening. If the vendor passes re-screening, invoices with the vendor will be extracted for payment. Otherwise, the invoices will continue to be placed in a hold status.

On the invoice record, users can click the **Recall Invoice to Processor** button to recall the invoice.



Users can then click the **Approve** button to re-submit the invoice for re-screening.



VIEW THE AUDIT TRAIL

When a vendor's screening status is changed, this change is logged and documented in the audit trail with the Export Trade Sanctions (ETS) Category, status code, and the screening status. Users can reference the following table to understand the

categories and codes documented in the audit trail.

ETS Category (Available in Audit Trail)	Status Code (Available in Audit Trail)	Screening Status (Available statuses in the Screening Status column on the Manage Vendors Page)
ETS1	01	Sanctioned
ETS3	01	Sanctioned
ETS4	01	Sanctioned
ETOK	02	Passed
ETS2	04	Pending Review
EX30	30	System Pending
EX31	31	Invalid
EX32	32	Translation in progress

SEARCH FOR VENDORS BY SCREENING STATUS

Users can search for vendors by selecting *Screening Status* in the **Search** list on the **Manage Vendors** page.

SUBMIT PURCHASE REQUESTS AND PURCHASE ORDERS

When users submit a purchase request for vendors that are identified as having a Sanctioned or Invalid status during BPS screening, purchase request submission is blocked.

When a user submits a purchase order created from a purchase request, and the purchase order for the vendor is identified as having a Sanctioned or Invalid status during BPS screening, PO transmission is blocked.

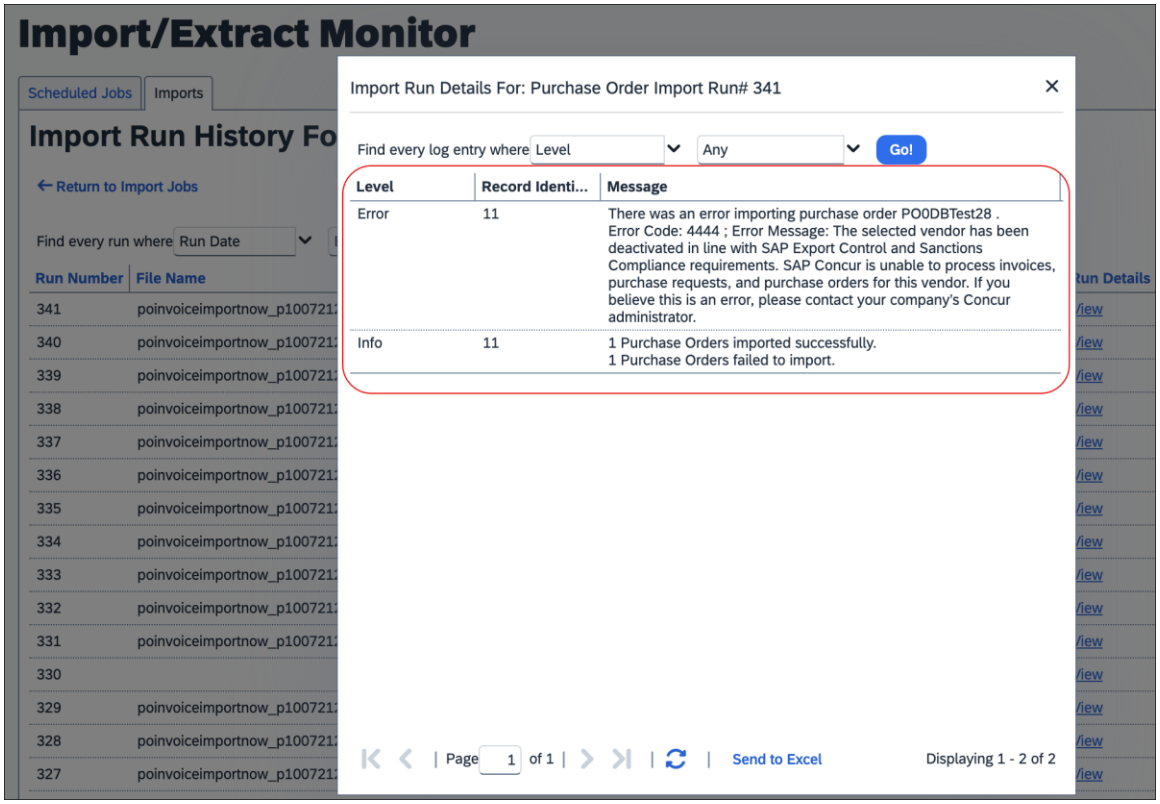
APIs and Imports for PR/PO

When users create a purchase request using Purchase Request v4 API, and the purchase request is created for vendors that are identified as having a Sanctioned or Invalid status during BPS screening, purchase request auto submission is blocked.

When users create a purchase order using Purchase Order v3 API or from the PO Import file for vendors that are identified as having a Sanctioned or Invalid status during BPS screening, purchase order creation or import is blocked.

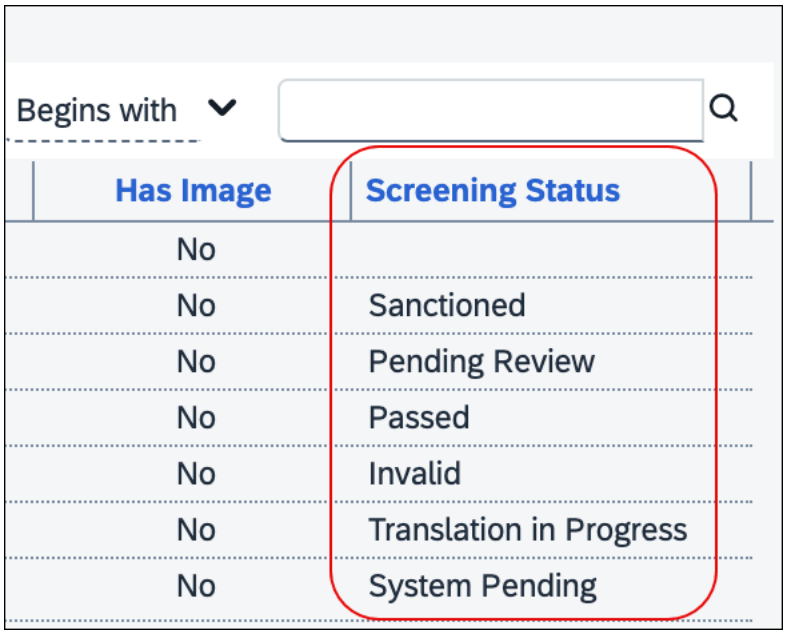
When user updates a purchase order using Purchase Order v3 API or the PO Import file for vendors that are identified as having a Sanctioned or Invalid status during BPS screening, purchase order update is blocked.

The following image is an example of messages that display in the **Import Run Details For: Purchase Order Import Run** window when invoices are imported successfully, fail, or have errors.



Vendor Manager Experience

Vendor Managers now see four new screening statuses display in the **Screening Status** column on the **Manage Vendors** page.



The **Screening Status** column displays four new status results based on BPS screening:

- **Passed:** Vendors that passed the BPS screening and can be used without restrictions.
- **Pending Review:** Vendors that require manual review by SAP Export Control Operations.
- **System Pending:** Vendors that are in the queue for BPS screening once the system is back online.
- **Translation in Progress:** Vendors that have non-Latin or special characters present and are currently being translated for BPS screening.

Configuration / Feature Activation

This change occurs automatically.

📖 For more information, refer to *Concur Invoice: Vendor Manager User Guide.*

Client Notifications

Accessibility

Accessibility Updates

SAP implements changes to better meet current Web Content Accessibility Guidelines (WCAG). Information about accessibility-related changes made to SAP Concur solutions is published on a quarterly basis. You can review the quarterly updates on the Accessibility Updates page.

Gender Diversity

SAP Concur is committed to supporting gender diversity. Over time we plan to implement product changes to help ensure that SAP Concur solutions support gender non-binary users. These changes will include but are not limited to support for preferred names, non-binary gender options in travel preferences, and non-binary titles.

These planned changes reflect SAP's commitment to supporting gender diversity and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the SAP Concur release notes.

In-Product User Assistance

Client Customized Content

If your company creates customized content for SAP Concur solutions through a user assistance tool such as SAP Enable Now or Concur User Assistant by WalkMe, the changes described in these release notes might affect your customized content. SAP Concur recommends reviewing the monthly release notes for all your SAP Concur solutions as well as the Shared Changes Release Notes to confirm whether any of the planned or released changes might impact your internal, customized content.

If any changes in a release impact your content, work with your internal teams to update your content accordingly.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available from the SAP Sub-processors / Data Transfer Factsheets page.

To access the SAP Concur Sub-processors List:

1. Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page:
   SAP Sub-processors / Data Transfer Factsheets
2. Sign in to the SAP Support Portal using your Support User ID (S-user) and password.

   NOTE: SAP customers must sign in to the SAP Support Portal using their Support User ID (S-user) and password. For information about S-User IDs, refer to *Your New Support User ID (S-user)* and to the Learn All About S-User IDs blog post.

3. On the SAP Sub-processors / Data Transfer Factsheets page, type Concur in the **Search** field.
4. In the **Title** column, click **SAP Concur Sub-processors List**.

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Supported Configurations

Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the *Concur Travel & Expense Supported Configurations* guide.

When changes to browser support are planned, information about those changes will also appear in the *Shared Changes Release Notes.*.

SAP Concur Support Case Status

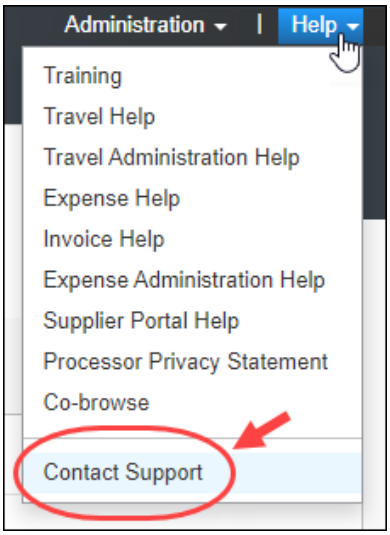
This release might resolve previously submitted support cases. You can check the status of a support case to confirm whether the case issue has been resolved.

Check Support Case Status

The steps in this procedure provide instructions for checking whether a case is resolved.

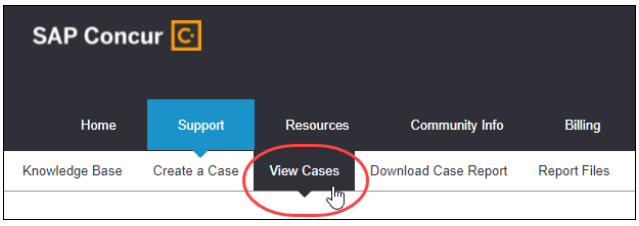
To check the status of a submitted case:

1. Log on to https://concursolutions.com/portal.asp.
2. Click **Help > Contact Support**.

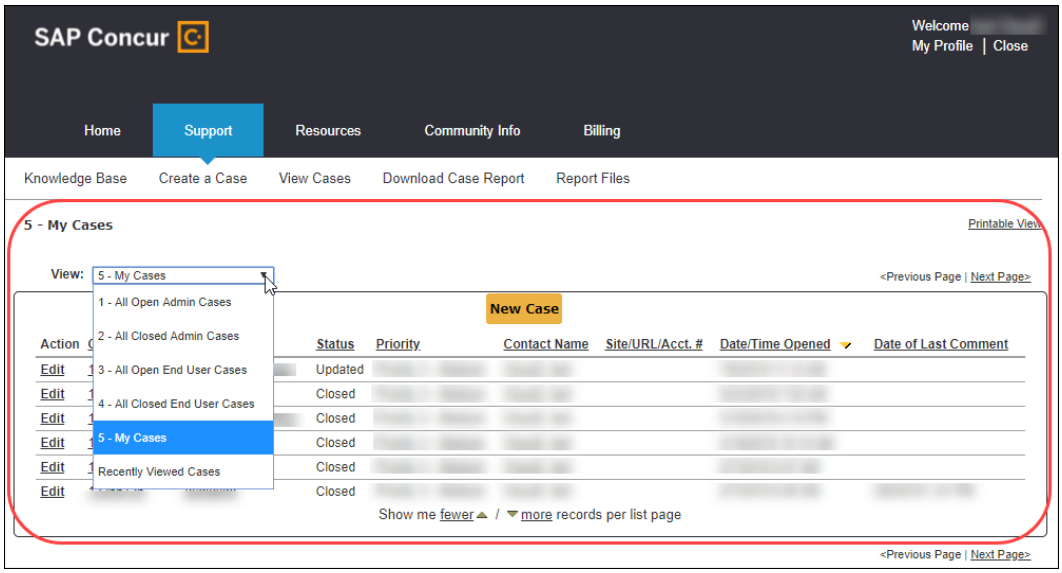


NOTE: If you do not have the option to contact SAP Concur support in the **Help** menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

3. Click **Support > View Cases**.



In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

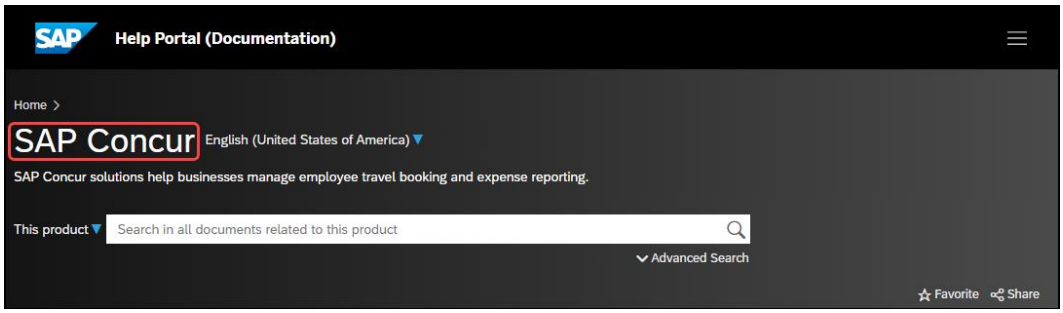


Additional Release Notes and Other Technical Documentation

Online Help

You can access release notes, setup guides, user guides, admin summaries, supported configurations, and other resources via the in-product Help menu or on the SAP Help Portal.

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the SAP Concur solutions page.



SAP Concur Support Portal – Selected Users

Access release notes, webinars, and other technical documentation on the SAP Concur support portal.

If you have the required permissions, **Contact Support** is available on the SAP Concur **Help** menu and in the SAP Concur page footer.

Click **Contact Support** to access the SAP Concur support portal, then click **Resources**.

- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.

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SAP Concur Release Notes

Concur Invoice Professional/Premium

Includes: Concur Invoice, Capture Processing, Invoice Pay, Purchase Requests and Purchase Orders

Month	Audience
Release Date: February 24, 2024 Initial Post: February 23, 2024	Client ***FINAL***

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Release Notes

This document contains the release notes for Concur Invoice for professional edition.

NOTE: Features and changes that apply to SAP Concur site-wide or to multiple products/services are documented in the *Shared Changes Release Notes*. For information about site-wide or shared changes in this release that might impact your SAP Concur solutions, refer to the *Shared Changes Release Notes*.

Concur Invoice UX Evolution

Ongoing Updated User Interface (UI) for Concur Invoice End Users

Information First Published	Information Last Modified	Automatic Transition Date
July 14, 2023	February 9, 2024	To Be Determined
Any changes since the previous monthly release are highlighted in yellow in this release note.		

This change is part of the Concur Invoice UX Evolution experience.

Overview

The continued evolution of the Concur Invoice solution user interface (UI) experience is the result of thoughtful design and research that provides a modern, intuitive, and streamlined experience for the invoice process.

Customers will have the ability to preview and then opt in to the new UI for Concur Invoice before the automatic transition date.

BUSINESS PURPOSE / CLIENT BENEFIT

The result is the evolution of the Concur Invoice user interface designed to provide a modern, consistent, and streamlined user experience. The new UI focuses on consistency across SAP Concur Spend offerings, and includes several significant enhancements requested by clients. Focus areas include end-user efficiency when interacting with invoices, performance and stability, as well as accessibility compliance.

Products and Users Affected

To take advantage of these improvements, Concur Invoice customers will be required to transition to the new UI at a future date to be determined. The following sections provide information about the timeline and resources available to ensure this process is smooth and efficient for all users.

The new UI changes apply to:

- Concur Invoice (Professional/Premium and Standard) end users only

IMPORTANT: Timeline and Milestones

There are four important milestones for Concur Invoice customers as they transition from the current UI to the new UI.

1. **Early Adopter Care (EAC) Period**: August 2023 – Ongoing in 2024

   We are currently in the Early Adopter Care Period: During this time, the new UI is available to preview for customers participating in the Early Adopter Care Program. We encourage administrators and power users to use the Early Adopter Care Period to preview the refreshed interface, update internal training materials, and prepare the organization for the transition.

   NOTE: During the Early Adopter Care Period, not all planned features from the current UI will be available in new UI for Concur Invoice. New features and enhancements continue to be planned for future releases. ***The Early Adopter Care Period is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

   If your organization is interesting in participating in the Early Adopter Care Program, please refer to the SAP Early Adopter Care page for more information.

2. **Opt-In Period:** Targeted for Q2 2024

   Following the Early Adopter Care Period there will be an open Opt-In Period. This milestone will be marked by the delivery of most planned features as well as further overall product quality and stability. The Opt-In Period will be available to all Concur Invoice customers.

   Customers should use this period to plan their transition and move to the new UI for Concur Invoice when it is right for your business priorities. Some remaining features will become available throughout this period, so customers should plan their roll out accordingly.

3. **Active Move Period:** To be determined

   All customers will be required to move to the new UI. The first day of the Active Move Period is the first day of the 12-month notice period we committed to for customers to complete the transition at their own pace before the automatic transition date.

   Customers are strongly encouraged to complete the tasks necessary to ensure a smooth transition for their organization and then transition during the Active Move Period.

4. **Automatic Transition Date:** To be determined

   All customers will be automatically transitioned to the new UI. This ensures that we continue to offer a consistent user experience for all customers and allows for superior product innovation and support.

Transition Information – Guides and Other Resources

We will provide guide updates, online help updates, release notes, and other resources to help in the transition.

Examples of where to find information about the new UI:

- **Setup and user guides, FAQs, transition resources:** During the transition from the current UI to the new UI, the Concur Invoice setup and user guides will be updated to include information about the new UI in addition to the current UI.

  Along with the guide updates, there are other resources (such as an FAQ), and a list of features that are not yet available in the new UI. All these materials can be used to help customers prepare their users.
- **SAP Help Portal:** Concur Invoice topics will also be updated for the new UI in the Concur Invoice | SAP Help Portal. During the transition from the current UI to the new UI, the topics will include information about the current UI and the new UI.
- **Release information:** Release notes for enhancements associated with the new UI will be provided in the monthly Concur Invoice release notes. Release notes for the new UI will be clearly marked in the monthly release notes.

Get Started

Customers are encouraged to use the transition information described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

Feature Availability

The Invoice UX Evolution user interface will be applied to specific Concur Invoice features in a phased approach during the Early Adopter and Opt-In milestones. There are some Concur Invoice features that the Invoice UX Evolution user interface will not be applied to during the Early Adopter or Opt-In milestones.

Use the following table to view which Concur Invoice features are currently updated with the Invoice UX Evolution user interface. The table also indicates whether a feature is a major or minor feature and which features will not be updated with the new user interface.

NOTE: Clients using the major features listed in the Major Features section of the table should ***not*** move to the Invoice UX Evolution UI until the major features they are using are available in the Invoice UX Evolution UI.

Feature Availability for Invoice UX Evolution		
Feature Name	**Available?**	**Notes**
Major Features		
Attendees	No	Parity Professional Only
Auto-Save	Early Adopter Care (EAC) Period	New Professional | Standard
CFDI (Comprobantes Fiscal Digital por Internet) (Mexico)	No	Parity Professional | Standard
Create/Edit Invoice	EAC	Parity – with the new create and edit invoice workflow Professional | Standard
E-Bunsho	No	Parity Professional | Standard
Editing Allocations	No	Parity Professional | Standard
Expense Type Connected List	No	Parity Professional Only
Greater than 15 Line Items can be added in the Itemization section on the Create New Invoices page	No	New Professional | Standard
Line-Item Entry in the Itemization section on the Create New Invoices page	EAC	New Professional | Standard
Multiple VAT Field Support (Canada)	No	Parity Professional | Standard
PO Matching	No	Parity Professional | Standard
Recurring Invoices	EAC	Parity Professional | Standard
Tax Authority & Tax Validation Service	No	Parity Professional | Standard

Minor Features		
Auto Resize – View Port	EAC	New Professional | Standard
Cost Object Approval Filtering	No	Parity Professional | Standard
Default Image In Line	EAC	Parity Professional | Standard
Drag and Drop Images	EAC	New Professional | Standard
Enhanced Comments	EAC	Parity Professional | Standard
Enhanced Bulk Update Tools	No	New - Some Parity Professional | Standard
Expense Types – Connected Lists	No	Parity Professional | Standard
Invoice Owner Improvements	EAC	Parity – with new workflow Professional | Standard
Large Line Invoices (Pagination)	No	Parity Professional | Standard
Line-Item Entry Improvements – Custom Fields	EAC	Parity – with new workflow Professional | Standard
Qualtrics Integration	No	New Professional | Standard
Submit/Assign Button Improvements	EAC	Parity – with new workflow Professional | Standard
Switch Tax Mode Improvements	EAC	Parity – with new workflow Professional | Standard
Unassigned Invoices List screen – Record Locking	EAC	New Professional | Standard
Processor navigation to invoices in new UI	No	Parity – with new workflow Professional | Standard
Approver navigation to invoices in new UI	No	Parity – with new workflow Professional | Standard
VAT Tax Enhancements – Canada	No	Parity Professional | Standard
VAT Tax Mode	EAC	Parity – with new workflow Professional | Standard

Other Minor Parity Features	No	Parity Professional | Standard
Features that will not have the Invoice UX Evolution User Interface		
Concur Invoice Administration	No	
Approvals Invoice List	No	
Capture Processing	No	
Invoice Pay	No	
Processor Invoice List	No	

Invoice Pay

ACH Payment Extraction Changed to Funding Date

Overview

ACH invoice payments processed through Invoice Pay are now available to be extracted with the Invoice Payment Confirmation API or extract file on the funding date of the payment for clients to post to their ERP/accounting system. The funding date is the date monies are debited from the client's bank account to fund a batch of ACH invoice payments to their vendors.

Payment demands and invoices in sent batches that are successfully funded will update to a Paid status on the funding date. If a payment fails to credit a vendor's bank account, it will be returned to the client's bank account and appear on the **Failed Payments** page in Invoice Payment Manager. Entry for the failed invoice payment will then be available to extract with the Invoice Payment Confirmation API or extract file to reverse the original payment entry posted to the client's ERP/accounting system.

There are no changes to the ACH invoice payment data that is extracted. The change is only when ACH payments are available to be extracted.

BUSINESS PURPOSE / CLIENT BENEFIT

This change allows clients to reconcile and record ACH invoice payments in their ERP/account system at the appropriate time in the ACH payment process following accounting best practices.

Configuration / Feature Activation

This change occurs automatically.

Batches with Zero Payments Not Shown in Payment Batch List

Overview

Payment batches in Invoice Payment Manager that were created by the system but do not have payments will not be shown in the **Payment Batch List** on the **Monitor Payments** page.

Prior to this change, if all payments in an open batch were moved to a different batch by an Invoice Payment Manager user, the batch would still be in the **Payment Batch List** even though it did not contain any payments to be processed.

BUSINESS PURPOSE / CLIENT BENEFIT

This change improves the user experience for Invoice Payment Manager users by focusing the **Monitor Payments** page to display only on batches with payments.

End-User Experience

Invoice Payment Manager users will no longer see open batches with no payments on the **Monitor Payments** page in Invoice Payment Manager.

Configuration / Feature Activation

This change occurs automatically.

New Invoice Virtual Card Payments

Overview

Concur Invoice clients contracted for Invoice Payment Manager and that use Bank of Montreal (BMO) or Bank of the West corporate credit cards are now able to make payments to vendors using a new payment type for virtual cards. Invoice Payment Managers can set up a card account using a corporate credit card to generate virtual card payments and manage batches and payments all from within Concur Invoices. Invoices with a virtual card payment method type are created and approved in Concur Invoice the same way as invoices with other payment methods. Payments are facilitated by a third-party company (payment provider) instead of SAP Concur.

Payment of invoices by virtual cards provides the following benefits:

- Improved working capital by paying vendors with a virtual card now and the credit card statement with the settled payments later
- Faster and more secure payments to vendors
- Possible rebate incentives from issuer for corporate card programs
- Virtual card functionality added to Invoice Payment Manager, ensuring visibility to all payment methods in a single interface

Invoice virtual card payments initially supports Single Use Virtual Cards. Single Use Virtual Cards can only be successfully charged once by a vendor for the exact amount the virtual card was issued for. After the transaction settles the virtual card is automatically closed and cannot be used again. A new single use virtual card is issued for each payment to a vendor.

After a virtual card payment batch is closed, the payments are sent to the payment provider and an individual virtual card is generated for each payment in the batch. Once the virtual card is generated, a remittance email is sent to the vendor contact email in Concur Invoice. The body of the email contains the authorized payment amount, list of invoices being paid, and a link with instructions to access the virtual card from the payment provider. From the link the vendor can view the details of the virtual card to charge it in their point-of-sale system.

From Invoice Payment Manager, clients can configure the number of days a virtual card will remain active and can be charged after being issued. If a vendor does not charge the virtual card within the designated timeframe (**Days to Expiration** field), it will expire and cannot be charged. Invoice Payment Manager users can also cancel virtual cards before they are charged. Expired and canceled payments can be managed and reissued from the **Failed Payments** page in Payment Manager.

Invoice virtual card payments can be extracted for GL posting with the Invoice Payment Confirmation API or extract file after the virtual card is issued. After a vendor charges the card and the transaction settles, the **Payment Date** field of the payment in Concur Invoice is updated with settlement date.

A new Invoice Virtual Card Payment Reconciliation report in Cognos can be used to help reconcile settled payments in Concur Invoice to settled transaction on a credit card statement.

NOTE: Concur mobile app functionality is not included.

NOTE: Payment Release Management features are currently not supported for virtual card payments. Payment Release Management features will be supported in a future release.

NOTE: In future releases, this feature is planned to support additional bank/issuer credit cards.

BUSINESS PURPOSE / CLIENT BENEFIT

This feature provides clients with flexibility and a simple setup solution for issuing virtual cards as a form of payment to vendors.

Prerequisites

Clients must work with their vendors to determine whether they accept virtual cards as a form of payment. If so, the virtual card payment methods can be assigned as the default payment method type for invoices in the Concur vendor profile. Many banks/issuers offer services to help identify vendors who accept virtual card payments.

Clients must have Concur Invoice and Invoice Payment Manager on their contract.

Clients must have a Bank of Montreal (BMO) or Bank of the West company credit card. Clients who don't have one but would like to use this feature can work with their SAP Concur representative to apply for a new Bank of Montreal (BMO) or Bank of the West company card.

Currency and Country Availability

- **Currency:** USD and CAD only
- **Country:** United States and United States territories, and Canada

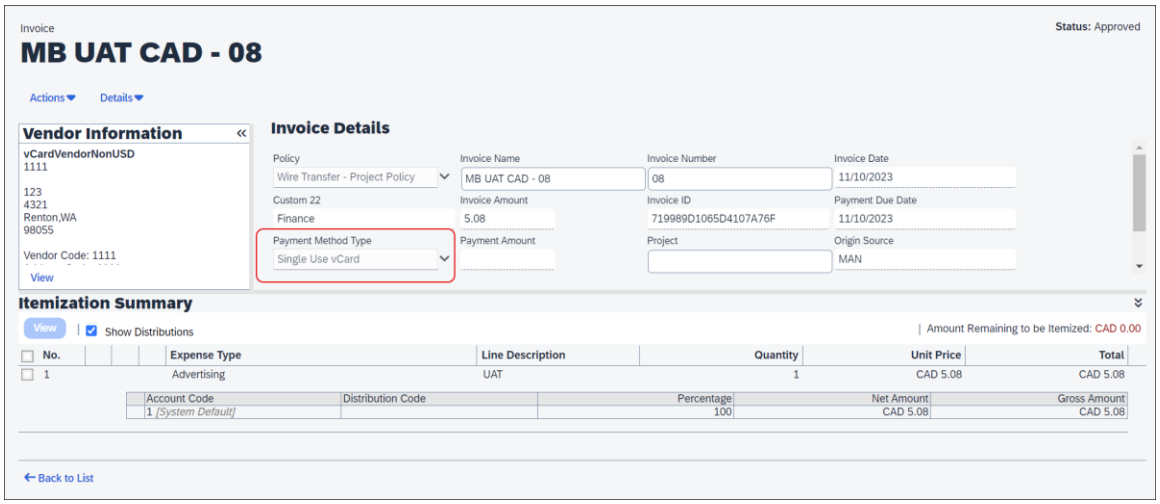
Roles

Users must have the Invoice Payment Manager role to manage and configure virtual cards.

End-User Experience

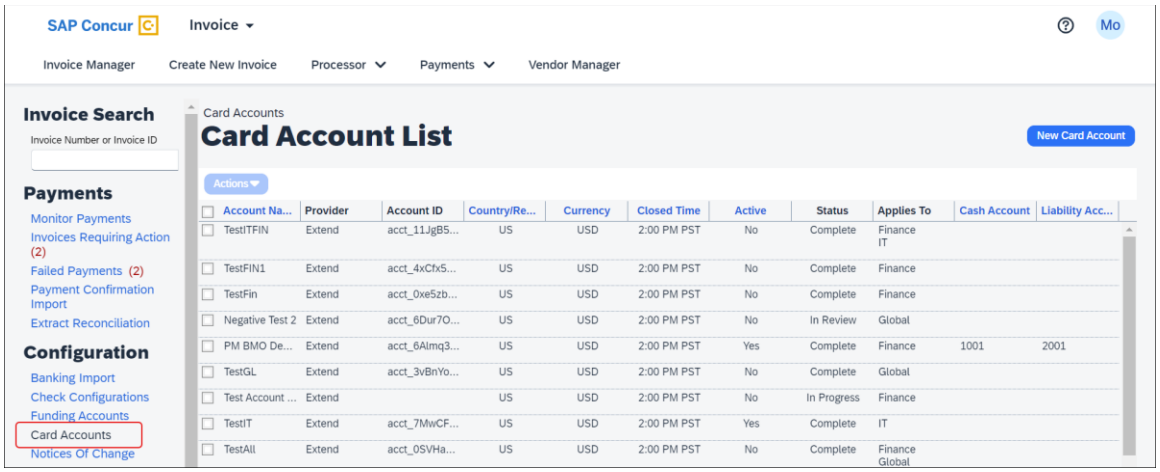
INVOICE OWNER

With virtual card payments enabled, users see *Single Use vCard* selected as the payment method for the invoice.



INVOICE PAYMENT MANAGER

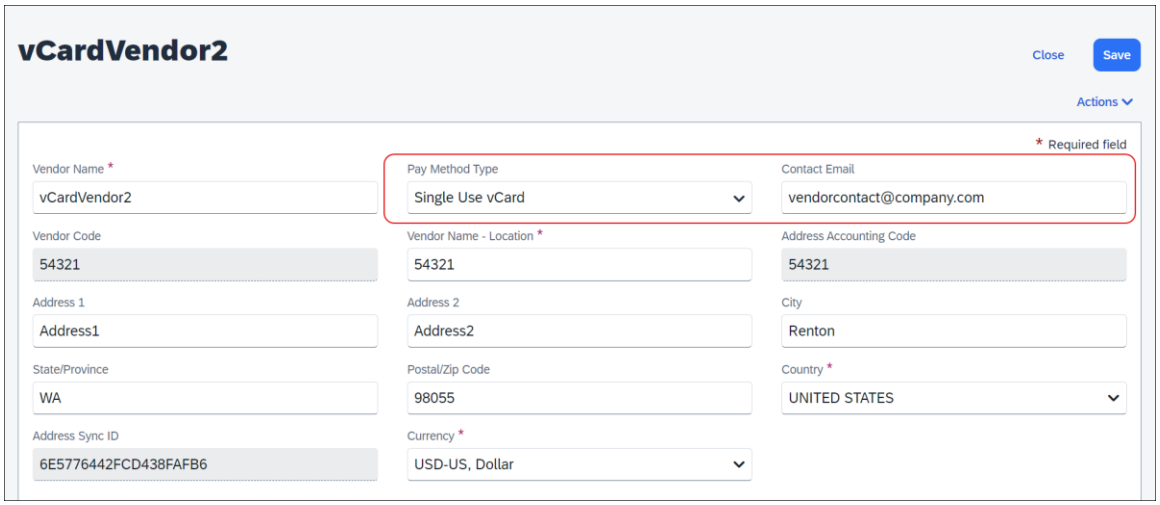
Invoice Payment Managers now see a new **Card Account List** page in Payment Manager under **Configuration**. The **Card Account List** page is used to set up a corporate credit card to generate virtual card payments from. Once a card account has completed the registration process with the payment provider it can be activated and used to pay vendors.



VENDOR MANAGER

Once the card account is configured, Vendor Managers need to update vendor records for vendors who accept virtual card payments.

In the **Pay Method Type** list for the vendor profile, the new *Single Use vCard* option displays and must be selected for all new invoices to default to this assigned payment method.



The **Contact Email** field in the vendor profile must be completed for vendors to receive a remittance email with a link to the virtual card.

Vendor profiles can be updated with the Vendor v3.1 API or import files.

Configuration / Feature Activation

If your company is interested in using virtual card payments, contact your SAP Concur representative to request support services for feature activation.

📖 For more information, refer to the *Concur Invoice: Invoice Pay Setup Guide* and *Concur Invoice: Invoice Pay User Guide* and the *Invoice Pay Processes* Help topics in the Concur Invoice Standard Edition Administrator Help | SAP Help Portal

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

NOTE: The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the *Shared Changes Release Notes*.

Digital Invoices

Planned Changes New PDF Generation for Peppol E-Invoices (Japan)

Information First Published	Information Last Modified	Feature Target Release Date
February 2024	--	March 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Concur Invoice clients in Japan (or those who have employees or configurations in Japan) that are using the Peppol Integration solution will soon be able to view and download a readable PDF version of the Peppol XML file. The PDF will be automatically generated from the Peppol XML e-invoice document and will be accessible through the **View Invoice** option in the invoice.

The generated PDF provides the following benefits:

- Presents the invoice data in a better readable format.
- Allows Invoice Approvers and Processors to compare the invoice record created in Concur Invoice against the generated PDF to reduce instances of fraud.
- Allows all users to verify vendor names from the XML and compare the default vendor selected in the invoice record in Concur Invoice.

📖 For more information on Concur Invoice Peppol Integration, refer to the *Concur Invoice Release Notes* for June 2023 and October 2023.

BUSINESS PURPOSE / CLIENT BENEFIT

This update allows clients to have a human-readable PDFs of their invoicing files for auditing purposes. It also meets the Japanese market requirements by providing a readable PDF version of the XML e-invoice.

Configuration / Feature Activation

This update occurs automatically.

Invoices – Qualified Invoices for Japan

Planned Changes Audit Rule Check for Validity of Vendor Tax ID (Japan)

Information First Published	Information Last Modified	Feature Target Release Date
February 2024	--	March 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

With this release, an audit rule can now be created that checks the validity of the **Vendor Tax ID** value provided by the user when saving and submitting an invoice.

This feature initially supports the Japan Qualified Invoice (JQI) initiative which requires a match of the tax ID against the Japanese government API. The Japanese government API verifies the value of the Vendor Tax ID against a list maintained by the government for the purposes of verifying tax reclamation. An administrator configures Concur Invoice to create an audit rule and execute the rule when the user saves or submits the invoice.

Future releases will include support for this feature in additional selected countries.

BUSINESS PURPOSE / CLIENT BENEFIT

When configured, this feature lets Concur Invoice automatically confirm the validity of the Vendor Tax ID value, saving time and preventing disruption when submitting an invoice requiring validation of Japanese invoices that include the Vendor Tax ID.

End-User Experience

The end-user creates the invoice record and sets the country value to either Japan (or any city located in Japan). The Vendor Tax ID displays based on vendor. The audit rule is then run when the user saves or submits the invoice. An exception is shown if the match is invalid, or if the service is currently unavailable.

NOTE: If the Vendor Tax ID needs to be validated, the Vendor Tax ID needs to be maintained at the vendor level.

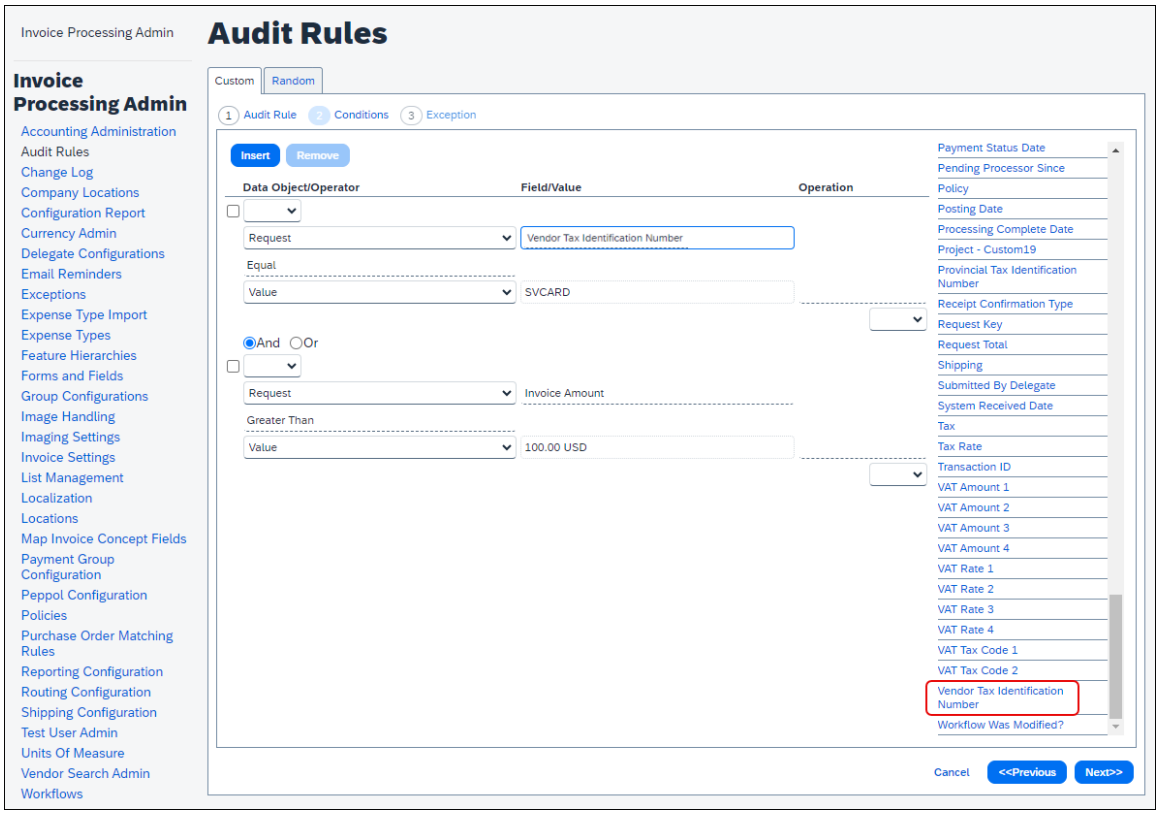
Administrator Experience

The Invoice Processing administrator first confirms that either the **Country/Region** field or the **City (Location)** field is included on the Invoice Entry form and editable by the end-user, using the Forms and Fields tool. Next, they use the Audit Rule

options to configure the audit rule. When the country set for the invoice is set to Japan or a Japanese city, the audit rule checks the validity of the Vendor Tax ID with the Japanese Government API.

CREATING A CUSTOM AUDIT RULE

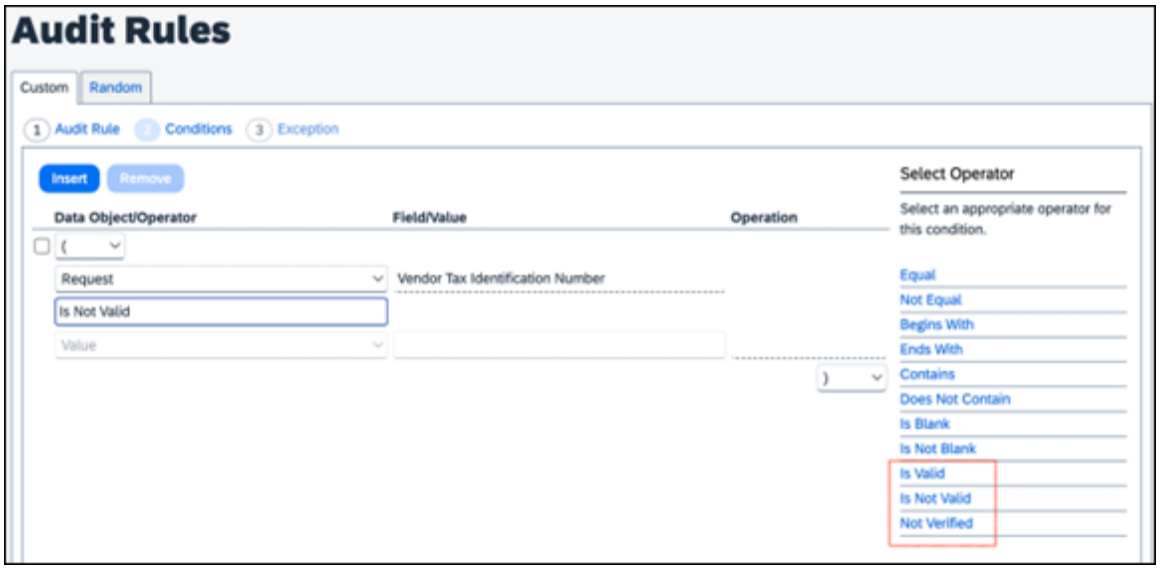
Invoice Processing administrators see **Vendor Tax Verification Number** displayed on the **Audit Rules** page for the **Custom** tab.



Once **Vendor Tax Identification Number** is selected, three new operators now display in the **Select Operator** list:

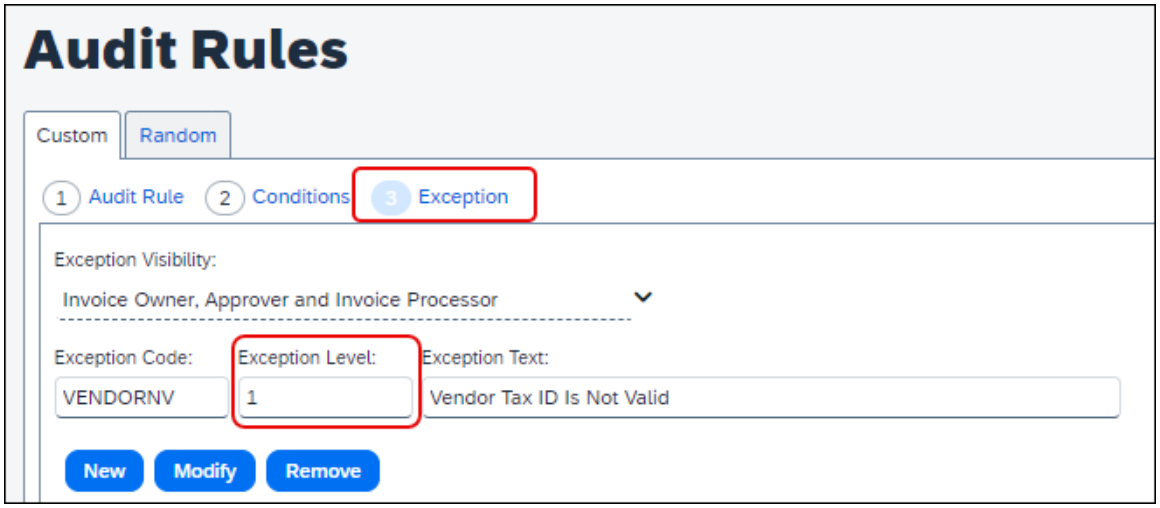
- **Is Valid** – The Vendor Tax ID is registered with the Japan government.
- **Is Not Valid** – The Vendor Tax ID is not registered with the Japan government.
- **Not Verified** – The Vendor Tax ID verification is not completed due to a temporary system issue. Users may need to re-run the audit rule if they want to verify the values.

In the following image, a sample audit rule checks the **Vendor Tax Identification Number** using the **Is Not Valid** operator.



CREATING AN EXCEPTION

If an exception should be created for an invalid ID, that is done using options in step 3, where a number may be assigned that the system uses to allow or block submission.



In the event the internal service is unavailable or returns an error, the invoice returns as "Not Verified". A message may display if the client has configured it for the audit rule. SAP Concur recommends clients use the following message, *"The Vendor Tax ID could not be validated against an external service. Please try again after some time to retry validation. If the error persists, please contact SAP Concur support or your Concur Administrator".*

If the Vendor Tax ID fails validation, the audit rule evaluates the system check as **Is Not Valid**.

If the Vendor Tax ID passes validation, the audit rule evaluates the system check as **Is Valid**.

Configuration / Feature Activation

The option for the Concur Invoice administrators to configure this type of audit rule is automatically available. However, no changes are automatically made to the existing audit rules: the Concur Invoice administrator must proactively configure this type of rule before it will apply to invoices.

📖 For general information, refer to the *Concur Invoice: Audit Rules Setup Guide*.

Invoice Pay

Planned Changes New Currencies for ACH/EFT Payments

Information First Published	Information Last Modified	Feature Target Release Date
February 2024	--	March 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

SAP Concur Invoice clients contracted for Invoice Payment Manager and who have a Canadian Dollar (CAD), Euro (EUR), and/or British Pound (GBP) bank account will be able to make low-cost Electronic Funds Transfer (ETF) payments to vendors using the ACH payment method type.

Clients can set up their company's CAD, EUR, and/or GBP bank account in Concur Invoice Payment Manager by creating a funding account with SAP Concur's third-party ACH/EFT payment provider (Worldline) to facilitate invoice payments to their vendors.

Invoice payments are batched in Invoice Payment Manager for clients to review and manage before being sent to the payment provider to be processed. Using the Invoice Payment Confirmation extract or a financial connector application integrated with it, clients can post invoice payments to the ERP/accounting system.

BUSINESS PURPOSE / CLIENT BENEFIT

This update provides Concur Invoice clients, who work with vendors located in Canada, Eurozone countries, and the United Kingdom, the ability to process low-cost EFT invoice payments using Invoice Payment Manager.

Prerequisites

Clients must have Concur Invoice and Invoice Payment Manager on their contract.

Clients must have a bank account in the supported countries and currencies and be able to register it with Worldline.

Supported ACH/EFT Payments

Currency	Country/Region	Payment System	Payment Cycle
Canada Dollar (CAD)	Canada	ACSS	3 Bank Days
Euro (EUR)	Eurozone Countries and territories	SEPA	4 Bank Days
Pound Sterling (GBP)	United Kingdom	BACS	3 Bank Days
*US Dollar (USD) *Existing functionality	United States and territories	ACH	5 Bank Days

NOTE: Cross-border and foreign exchange payments are not supported.

Roles

Users must have the Invoice Payment Manager role to configure ACH/EFT funding accounts and view payment batches.

How it Works

Once the funding account has been reviewed and verified by the payment provider, it can be activated in Concur and invoice payments can begin being batched for processing from it.

Banking information for vendors with a CAD, EUR, or GBP bank account, who are to be paid by EFT, can be added to the client's Concur vendor profile by API, import file, or manual entry. The Pay Method Type in the vendor profile should be set to *ACH* for new invoices to default to be paid by EFT. A remittance email with payment and invoice details can be sent to email addresses populated in the **Contact Email Address** field.

In Concur Invoice, clients create, approve, and post to their ERP/accounting system invoices with the ACH pay method type the same way as invoices with other payment methods. After completing the approval workflow, approved ACH invoices are batched to be paid by EFT from the funding account in Invoice Payment Manager. Based on the invoice payment due date and batch settings configured in the funding account, the system automatically assigns the invoice to a batch schedule to be processed so the EFT payment credits the vendor's bank account on the payment due date.

Clients can view and manage payment batches on the **Monitor Payments** page in Invoice Payment Manager. After a batch closes, the payments are sent to the payment provider to be processed and the remittance email is sent to the vendor contact.

Invoices are updated to a Paid payment status on the funding date of the batch when monies for the total batch amount are debited from the client's bank account with which the Concur funding account is associated. Clients can then extract the

invoice payments from Concur to post to their ERP/accounting system with the Invoice Payment Confirmation API or extract file.

NOTE: The invoice, the funding account the payment debited from, and the vendor bank account the payment is credited to, must **all** be the same currency for a payment to be processed.

Configuration / Feature Activation

SAP Concur staff must enable the Invoice Pay settings for clients for them to be able to create funding accounts.

For more information about creating funding accounts, refer to the *Concur Invoice Pay Setup Guide*.

Vendor Management

Planned Changes SAP Business Partner Screening Solution Now Performs Automatic Online Screening

Information First Published	Information Last Modified	Feature Target Release Date
December 2023	January 19, 2024	Q1 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

SAP Concur now performs automatic online screening of vendors (suppliers) within Concur Invoice Vendor Management using the SAP Business Partner Screening (BPS) solution. Previously, SAP Concur performed offline screening of vendors (suppliers) within Concur Invoice Vendor Management using the SAP Business Partner Screening (BPS) solution.

For more information, refer to the *Vendor Management | SAP Business Partner Screening Solution (August 11)* release note published in the *Concur Invoice Release Notes* for August 2023.

The BPS solution is used to prevent prohibited vendors in embargoed countries or regions, or in sanctioned entities listed by the various applicable government agencies, from performing business activities with SAP products.

SAP policy prohibits the use of all SAP products and services in, from, or in support of, any business activities in locations where SAP products and services are not available. This list includes Cuba (CU), Iran (IR), North Korea (KP), Syria (SY), and regions of the Ukraine (Donestsk, Luhansk, and Crimea). This change also impacts the following currencies Cuba, Peso (CUC and CUP); North Korean Won (KPW); Syria, Pound (SYP); Iran, Rial (IRR).

When users try to submit an invoice for vendors that are identified as having a Sanctioned or Invalid status during BPS screening, invoice submission will be blocked. Only invoices for vendors that passed BPS screening will be extracted to the financial system for payment.

With the release of the new automatic online screening update, this feature release also includes:

- Four new screening statuses in the **Screening Status** column on the **Vendor Managers** page
- A new *Screening Status* option in the **Search** list on the **Manage Vendors** page
- The ability to recall invoices for re-screening
- New alert messages for vendor invoice status during BPS screening
- Audit trail tracking of Export Trade Sanctions (ETS) categories, status codes, and screening statuses
- The ability to block submission of purchase requests (PR) and purchase orders (PO) for vendors with a Sanctioned or Invalid status during BPS Screening.

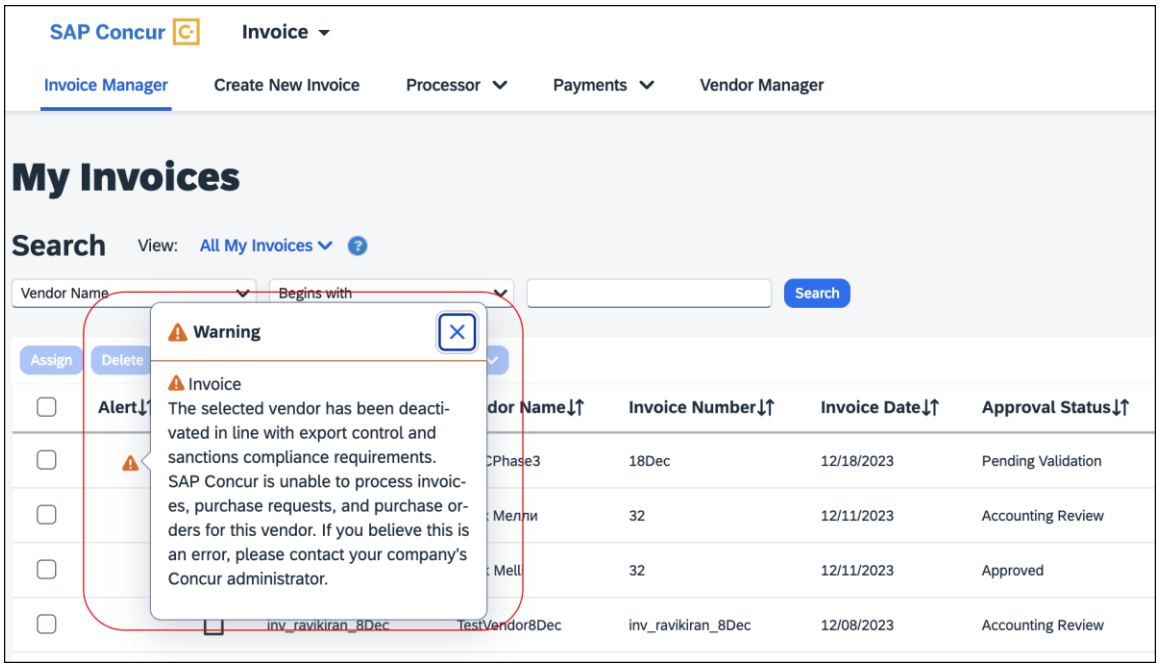
BUSINESS PURPOSE / CLIENT BENEFIT

This change ensures clients follow local, national, and international laws governing embargoed countries and sanctioned individuals/entities and are systematically protected to the best ability from malicious actors and actions when working with SAP Concur products.

End User Experience

VIEW ALERT MESSAGES

After invoice submission, users now see additional alerts displayed on the **My Invoices** page in **Invoice Manager** to track vendor invoices during BPS screening status.



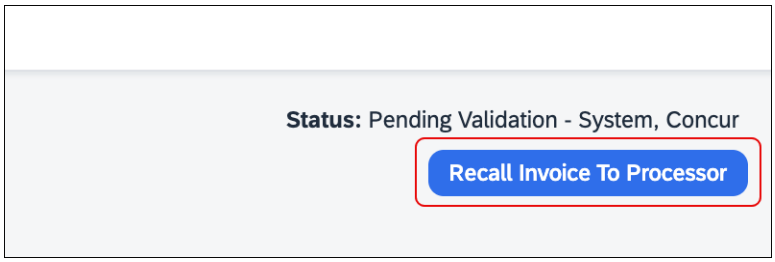
Alerts that may display include:

- **Sanctioned:** *The selected vendor has been deactivated in line with SAP Export Control and Sanctions Compliance requirements. SAP Concur is unable to process invoices, purchase requests, and purchase orders for this vendor. If you believe this is an error, please contact your company's Concur administrator.*
- **Pending Review:** *The selected vendor in this invoice is currently under review as part of SAP's Export Control and Sanctions Compliance policy. We appreciate your patience as we are processing your request as quickly as possible.*
- **System Pending:** *The selected vendor in this invoice is currently under review as part of SAP's Export Control and Sanctions Compliance policy. We appreciate your patience as we are processing your request as quickly as possible.*
- **Invalid:** *At this time, SAP Concur is unable to support the selected vendor as the information appears incomplete or inaccurate. Please ensure the full legal name of the company or individual and their full address (street, city, state (if applicable), and country/region) are complete and accurate in the vendor record.*

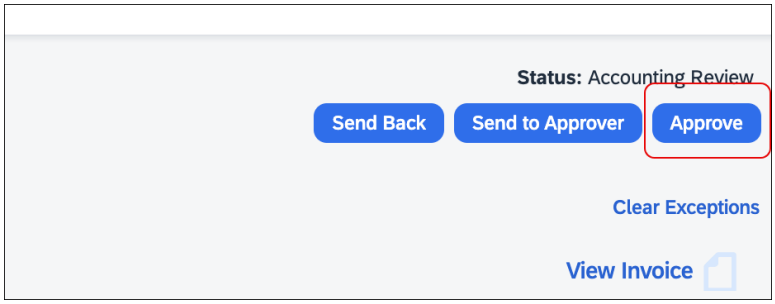
RECALL INVOICES FOR RE-SCREENING

If the vendor does not pass the BPS screening at the Prepayment Validation state, invoices with the vendor are placed on hold and an alert message displays for the invoice. Users can recall the invoice to the processor and approve it to initiate re-screening. If the vendor passes re-screening, invoices with the vendor will be extracted for payment. Otherwise, the invoices will continue to be placed in a hold status.

On the invoice record, users can click the **Recall Invoice to Processor** button to recall the invoice.



Users can then click the **Approve** button to re-submit the invoice for re-screening.



VIEW THE AUDIT TRAIL

When a vendor's screening status is changed, this change is logged and documented in the audit trail with the Export Trade Sanctions (ETS) Category, status code, and the screening status. Users can reference the following table to understand the categories and codes documented in the audit trail.

ETS Category (Available in Audit Trail)	Status Code (Available in Audit Trail)	Screening Status (Available statuses in the Screening Status column on the Manage Vendors Page)
ETS1	01	Sanctioned
ETS3	01	Sanctioned
ETS4	01	Sanctioned
ETOK	02	Passed
ETS2	04	Pending Review

EX30	30	System Pending
EX31	31	Invalid
EX32	32	Translation in progress

SEARCH FOR VENDORS BY SCREENING STATUS

Users can search for vendors by selecting *Screening Status* in the **Search** list on the **Manage Vendors** page.

SUBMIT PURCHASE REQUESTS AND PURCHASE ORDERS

When users submit a purchase request for vendors that are identified as having a Sanctioned or Invalid status during BPS screening, purchase request submission is blocked.

When a user submits a purchase order created from a purchase request, and the purchase order for the vendor is identified as having a Sanctioned or Invalid status during BPS screening, PO transmission is blocked.

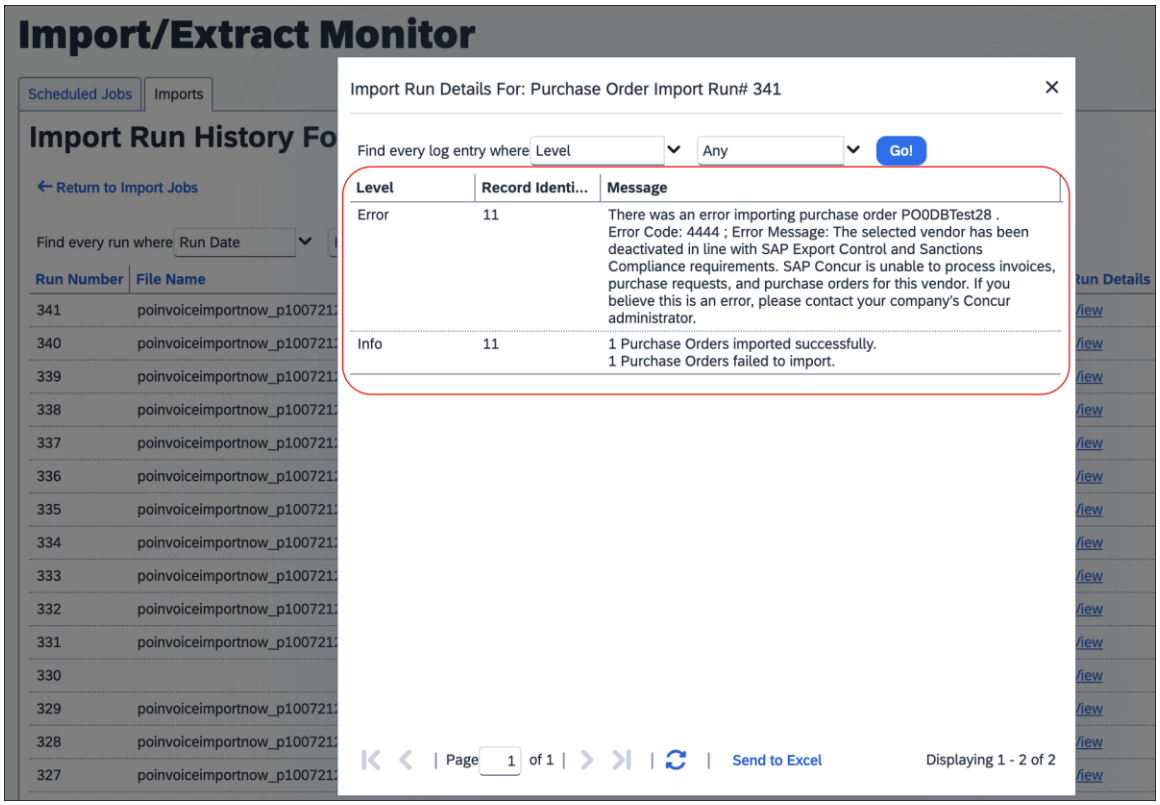
APIs and Imports for PR/PO

When users create a purchase request using Purchase Request v4 API, and the purchase request is created for vendors that are identified as having a Sanctioned or Invalid status during BPS screening, purchase request auto submission is blocked.

When users create a purchase order using Purchase Order v3 API or from the PO Import file for vendors that are identified as having a Sanctioned or Invalid status during BPS screening, purchase order creation or import is blocked.

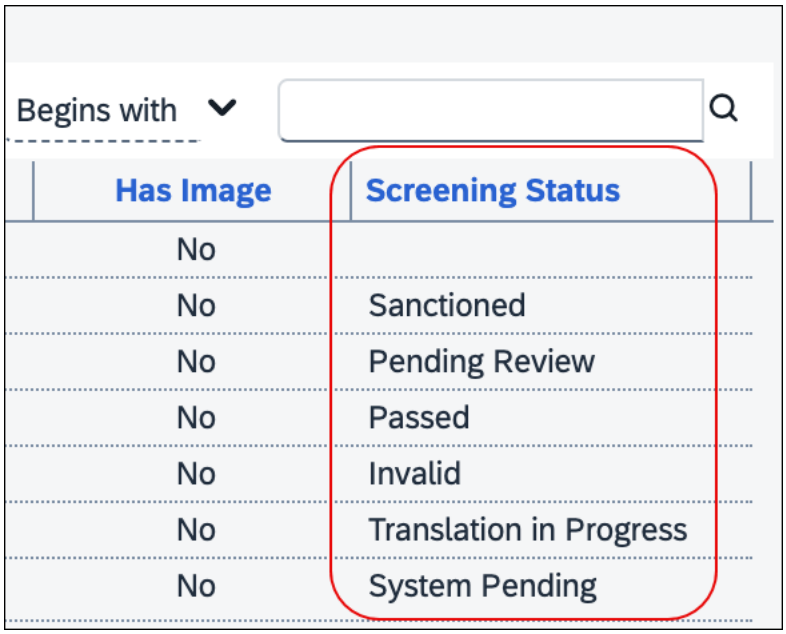
When user updates a purchase order using Purchase Order v3 API or the PO Import file for vendors that are identified as having a Sanctioned or Invalid status during BPS screening, purchase order update is blocked.

The following image is an example of messages that display in the **Import Run Details For: Purchase Order Import Run** window when invoices are imported successfully, fail, or have errors.



Vendor Manager Experience

Vendor Managers now see four new screening statuses display in the **Screening Status** column on the **Manage Vendors** page.



The **Screening Status** column displays four new status results based on BPS screening:

- **Passed:** Vendors that passed the BPS screening and can be used without restrictions.
- **Pending Review:** Vendors that require manual review by SAP Export Control Operations.
- **System Pending:** Vendors that are in the queue for BPS screening once the system is back online.
- **Translation in Progress:** Vendors that have non-Latin or special characters present and are currently being translated for BPS screening.

Configuration / Feature Activation

This change occurs automatically.

📖 For more information, refer to *Concur Invoice: Vendor Manager User Guide.*

Client Notifications

Accessibility

Accessibility Updates

SAP implements changes to better meet current Web Content Accessibility Guidelines (WCAG). Information about accessibility-related changes made to SAP Concur solutions is published on a quarterly basis. You can review the quarterly updates on the Accessibility Updates page.

Gender Diversity

Gender Diversity Planned Features and Changes

SAP Concur is committed to supporting gender diversity. Over time we plan to implement product changes to help ensure that SAP Concur solutions support gender non-binary users. These changes will include but are not limited to support for preferred names, non-binary gender options in travel preferences, and non-binary titles.

These planned changes reflect SAP's commitment to supporting gender diversity and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the SAP Concur release notes.

In-Product User Assistance

Client Customized Content

If your company creates customized content for SAP Concur solutions through a user assistance tool such as SAP Enable Now or Concur User Assistant by WalkMe, the changes described in these release notes might affect your customized content. SAP Concur recommends reviewing the monthly release notes for all your SAP Concur solutions as well as the Shared Changes Release Notes to confirm whether any of the planned or released changes might impact your internal, customized content.

If any changes in a release impact your content, work with your internal teams to update your content accordingly.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available from the SAP Sub-processors / Data Transfer Factsheets page.

To access the SAP Concur Sub-processors List:

1. Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page:
   SAP Sub-processors / Data Transfer Factsheets
2. Sign in to the SAP Support Portal using your Support User ID (S-user) and password.

   NOTE: SAP customers must sign in to the SAP Support Portal using their Support User ID (S-user) and password. For information about S-User IDs, refer to *Your New Support User ID (S-user)* and to the Learn All About S-User IDs blog post.
3. On the SAP Sub-processors / Data Transfer Factsheets page, type Concur in the **Search** field.
4. In the **Title** column, click **SAP Concur Sub-processors List**.

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Supported Configurations

Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the *Concur Travel & Expense Supported Configurations* guide.

When changes to browser support are planned, information about those changes will also appear in the *Shared Changes Release Notes.*.

SAP Concur Support Case Status

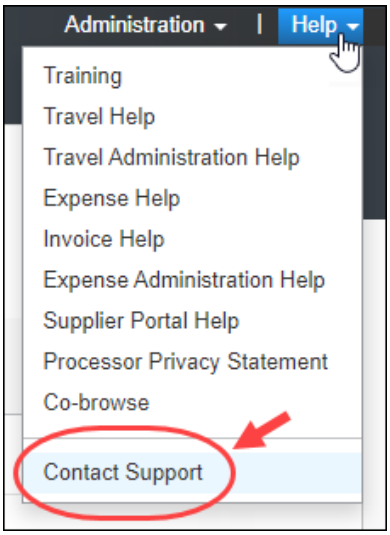
This release might resolve previously submitted support cases. You can check the status of a support case to confirm whether the case issue has been resolved.

Check Support Case Status

The steps in this procedure provide instructions for checking whether a case is resolved.

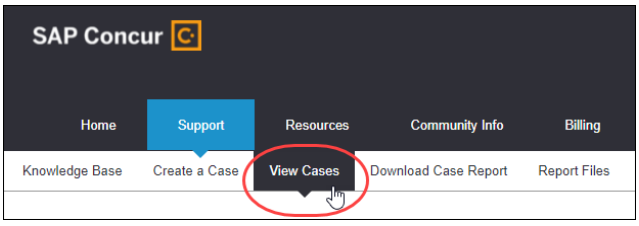
To check the status of a submitted case:

1. Log on to https://concursolutions.com/portal.asp.
2. Click **Help > Contact Support**.

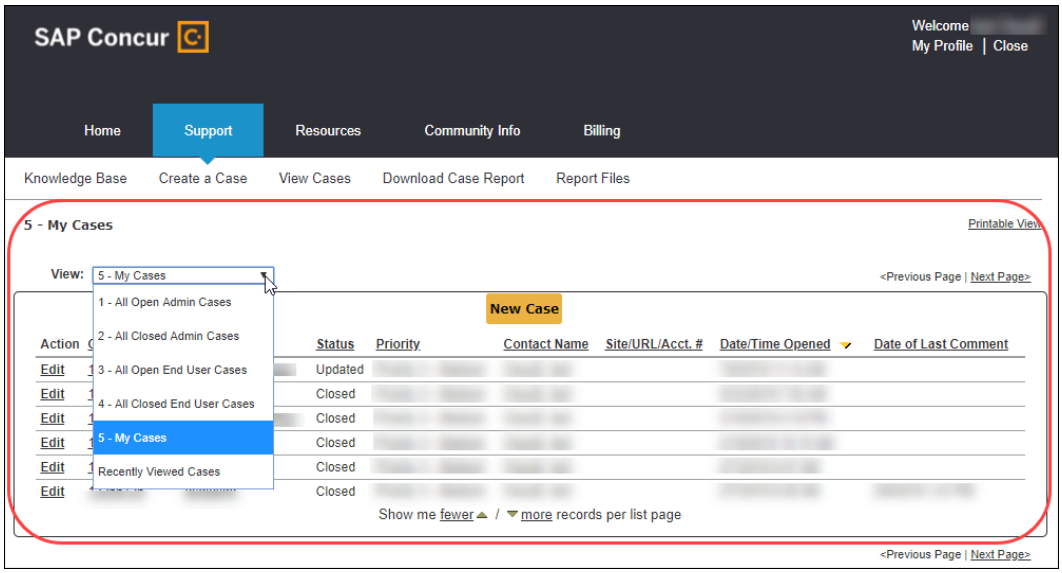


NOTE: If you do not have the option to contact SAP Concur support in the **Help** menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

3. Click **Support > View Cases**.



In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

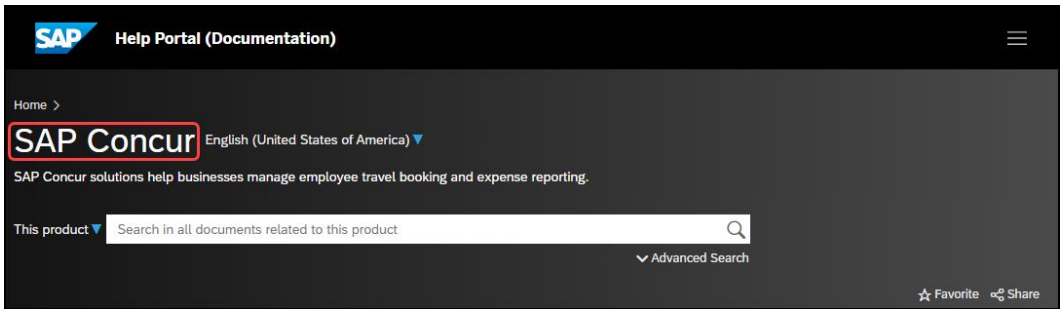


Additional Release Notes and Other Technical Documentation

Online Help

You can access release notes, setup guides, user guides, admin summaries, supported configurations, and other resources via the in-product Help menu or on the SAP Help Portal.

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the SAP Concur solutions page.



SAP Concur Support Portal – Selected Users

Access release notes, webinars, and other technical documentation on the SAP Concur support portal.

If you have the required permissions, **Contact Support** is available on the SAP Concur **Help** menu and in the SAP Concur page footer.

Click **Contact Support** to access the SAP Concur support portal, then click **Resources**.

- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.

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AP Concur Release Notes

Concur Invoice Professional/Premium

Includes: Concur Invoice, Capture Processing, Invoice Pay, Purchase Requests and Purchase Orders

Month	Audience
Release Date: March 23, 2024 Initial Post: March 22, 2024	Client ***FINAL***

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Release Notes

This document contains the release notes for Concur Invoice for professional edition.

NOTE: Features and changes that apply to SAP Concur site-wide or to multiple products/services are documented in the *Shared Changes Release Notes*. For information about site-wide or shared changes in this release that might impact your SAP Concur solutions, refer to the *Shared Changes Release Notes*.

Concur Invoice UX Evolution

Ongoing Updated User Interface (UI) for Concur Invoice End Users

Information First Published	Information Last Modified	Automatic Transition Date
July 14, 2023	February 9, 2024	To Be Determined
Any changes since the previous monthly release are highlighted in yellow in this release note.		

This change is part of the Concur Invoice UX Evolution experience.

Overview

The continued evolution of the Concur Invoice solution user interface (UI) experience is the result of thoughtful design and research that provides a modern, intuitive, and streamlined experience for the invoice process.

Customers will have the ability to preview and then opt in to the new UI for Concur Invoice before the automatic transition date.

BUSINESS PURPOSE / CLIENT BENEFIT

The result is the evolution of the Concur Invoice user interface designed to provide a modern, consistent, and streamlined user experience. The new UI focuses on consistency across SAP Concur Spend offerings, and includes several significant enhancements requested by clients. Focus areas include end-user efficiency when interacting with invoices, performance and stability, as well as accessibility compliance.

Products and Users Affected

To take advantage of these improvements, Concur Invoice customers will be required to transition to the new UI at a future date to be determined. The following sections provide information about the timeline and resources available to ensure this process is smooth and efficient for all users.

The new UI changes apply to:

- Concur Invoice (Professional/Premium and Standard) end users only

IMPORTANT: Timeline and Milestones

There are four important milestones for Concur Invoice customers as they transition from the current UI to the new UI.

1. **Early Adopter Care (EAC) Period**: August 2023 – Ongoing in 2024

   We are currently in the Early Adopter Care Period: During this time, the new UI is available to preview for customers participating in the Early Adopter Care Program. We encourage administrators and power users to use the Early Adopter Care Period to preview the refreshed interface, update internal training materials, and prepare the organization for the transition.

   NOTE: During the Early Adopter Care Period, not all planned features from the current UI will be available in new UI for Concur Invoice. New features and enhancements continue to be planned for future releases. ***The Early Adopter Care Period is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

   If your organization is interesting in participating in the Early Adopter Care Program, please refer to the SAP Early Adopter Care page for more information.

2. **Opt-In Period:** Targeted for Q2 2024

   Following the Early Adopter Care Period there will be an open Opt-In Period. This milestone will be marked by the delivery of most planned features as well as further overall product quality and stability. The Opt-In Period will be available to all Concur Invoice customers.

   Customers should use this period to plan their transition and move to the new UI for Concur Invoice when it is right for your business priorities. Some remaining features will become available throughout this period, so customers should plan their roll out accordingly.

3. **Active Move Period:** To be determined

   All customers will be required to move to the new UI. The first day of the Active Move Period is the first day of the 12-month notice period we committed to for customers to complete the transition at their own pace before the automatic transition date.

   Customers are strongly encouraged to complete the tasks necessary to ensure a smooth transition for their organization and then transition during the Active Move Period.

4. **Automatic Transition Date:** To be determined

   All customers will be automatically transitioned to the new UI. This ensures that we continue to offer a consistent user experience for all customers and allows for superior product innovation and support.

Transition Information – Guides and Other Resources

We will provide guide updates, online help updates, release notes, and other resources to help in the transition.

Examples of where to find information about the new UI:

- **Setup and user guides, FAQs, transition resources:** During the transition from the current UI to the new UI, the Concur Invoice setup and user guides will be updated to include information about the new UI in addition to the current UI.

  Along with the guide updates, there are other resources (such as an FAQ), and a list of features that are not yet available in the new UI. All these materials can be used to help customers prepare their users.
- **SAP Help Portal:** Concur Invoice topics will also be updated for the new UI in the Concur Invoice | SAP Help Portal. During the transition from the current UI to the new UI, the topics will include information about the current UI and the new UI.
- **Release information:** Release notes for enhancements associated with the new UI will be provided in the monthly Concur Invoice release notes. Release notes for the new UI will be clearly marked in the monthly release notes.

Get Started

Customers are encouraged to use the transition information described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

Feature Availability

The Invoice UX Evolution user interface will be applied to specific Concur Invoice features in a phased approach during the Early Adopter and Opt-In milestones. There are some Concur Invoice features that the Invoice UX Evolution user interface will not be applied to during the Early Adopter or Opt-In milestones.

Use the following table to view which Concur Invoice features are currently updated with the Invoice UX Evolution user interface. The table also indicates whether a feature is a major or minor feature and which features will not be updated with the new user interface.

NOTE: Clients using the major features listed in the Major Features section of the table should ***not*** move to the Invoice UX Evolution UI until the major features they are using are available in the Invoice UX Evolution UI.

Feature Availability for Invoice UX Evolution		
Feature Name	**Available?**	**Notes**
Major Features		
Attendees	No	Parity Professional Only
Auto-Save	Early Adopter Care (EAC) Period	New Professional | Standard
CFDI (Comprobantes Fiscal Digital por Internet) (Mexico)	No	Parity Professional | Standard
Create/Edit Invoice	EAC	Parity – with the new create and edit invoice workflow Professional | Standard
E-Bunsho	No	Parity Professional | Standard
Editing Allocations	No	Parity Professional | Standard
Expense Type Connected List	No	Parity Professional Only
Greater than 15 Line Items can be added in the Itemization section on the Create New Invoices page	No	New Professional | Standard
Line-Item Entry in the Itemization section on the Create New Invoices page	EAC	New Professional | Standard
Multiple VAT Field Support (Canada)	No	Parity Professional | Standard
PO Matching	No	Parity Professional | Standard
Recurring Invoices	EAC	Parity Professional | Standard
Tax Authority & Tax Validation Service	No	Parity Professional | Standard

Minor Features		
Auto Resize – View Port	EAC	New Professional | Standard
Cost Object Approval Filtering	No	Parity Professional | Standard
Default Image In Line	EAC	Parity Professional | Standard
Drag and Drop Images	EAC	New Professional | Standard
Enhanced Comments	EAC	Parity Professional | Standard
Enhanced Bulk Update Tools	No	New - Some Parity Professional | Standard
Expense Types – Connected Lists	No	Parity Professional | Standard
Invoice Owner Improvements	EAC	Parity – with new workflow Professional | Standard
Large Line Invoices (Pagination)	No	Parity Professional | Standard
Line-Item Entry Improvements – Custom Fields	EAC	Parity – with new workflow Professional | Standard
Qualtrics Integration	No	New Professional | Standard
Submit/Assign Button Improvements	EAC	Parity – with new workflow Professional | Standard
Switch Tax Mode Improvements	EAC	Parity – with new workflow Professional | Standard
Unassigned Invoices List screen – Record Locking	EAC	New Professional | Standard
Processor navigation to invoices in new UI	No	Parity – with new workflow Professional | Standard
Approver navigation to invoices in new UI	No	Parity – with new workflow Professional | Standard
VAT Tax Enhancements – Canada	No	Parity Professional | Standard
VAT Tax Mode	EAC	Parity – with new workflow Professional | Standard

Other Minor Parity Features	No	Parity Professional | Standard
Features that will not have the Invoice UX Evolution User Interface		
Concur Invoice Administration	No	
Approvals Invoice List	No	
Capture Processing	No	
Invoice Pay	No	
Processor Invoice List	No	

Invoices – Qualified Invoices for Japan

Audit Rule Check for Validity of Vendor Tax ID (Japan)

Overview

With this release, an audit rule can now be created that checks the validity of the **Vendor Tax ID** value provided by the user when saving and submitting an invoice.

This feature initially supports the Japan Qualified Invoice (JQI) initiative which requires a match of the tax ID against the Japanese government API. The Japanese government API verifies the value of the Vendor Tax ID against a list maintained by the government for the purposes of verifying tax reclamation. An administrator configures Concur Invoice to create an audit rule and execute the rule when the user saves or submits the invoice.

The audit rule checks for both invoice header and vendor information to read **Vendor Tax ID** value. So, the below conditions are valid:

- If the TaxID is in both the vendor information and the invoice header, then the audit rule checks TaxID in the invoice header. (It doesn't check vendor information.)
- If the TaxID is only in vendor information, then the audit rule checks TaxID in vendor information.
- If the TaxID is only in invoice header, then the audit rule checks the TaxID in invoice header.

Future releases will include support for this feature in additional selected countries.

BUSINESS PURPOSE / CLIENT BENEFIT

When configured, this feature lets Concur Invoice automatically confirm the validity of the Vendor Tax ID value, saving time and preventing disruption when submitting an invoice requiring validation of Japanese invoices that include the Vendor Tax ID.

End-User Experience

The end-user creates the invoice record and sets the country value to either Japan (or any city located in Japan). The Vendor Tax ID displays based on vendor. The audit rule is then run when the user saves or submits the invoice. An exception is shown if the match is invalid, or if the service is currently unavailable.

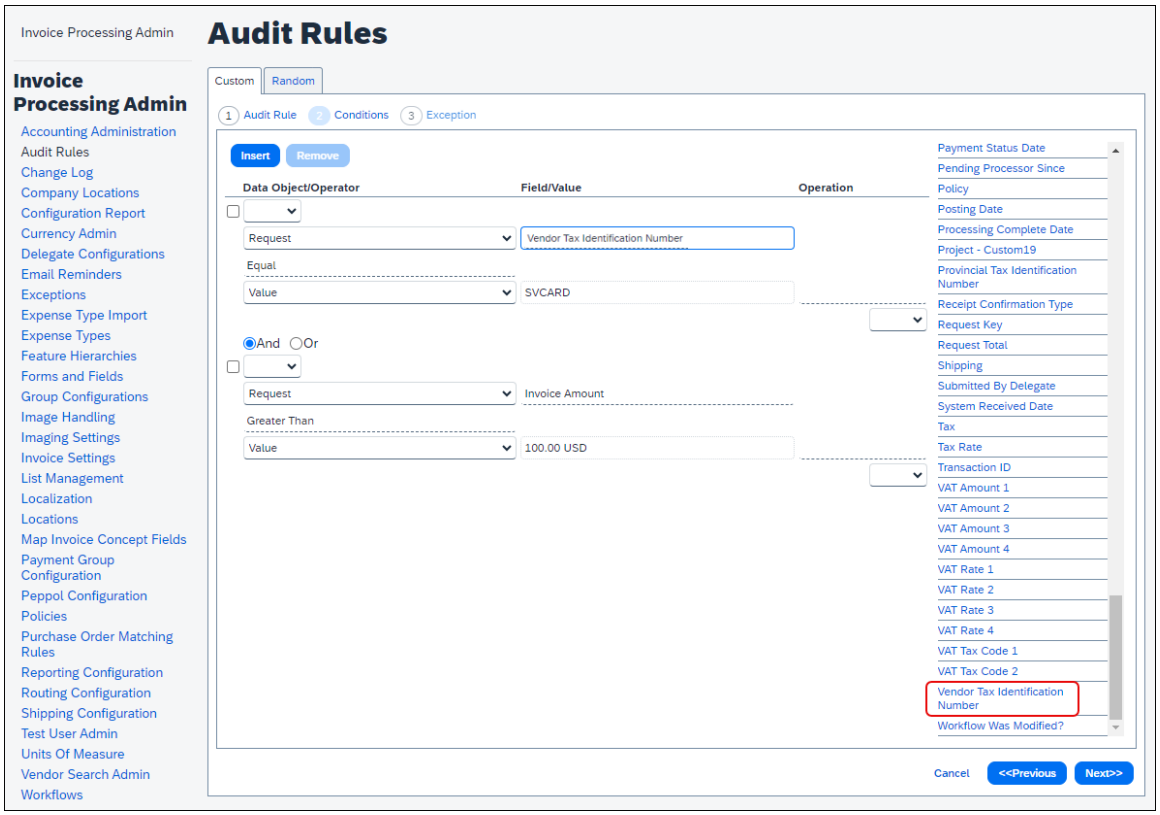
NOTE: If the Vendor Tax ID needs to be validated, the Vendor Tax ID needs to be maintained at the vendor level.

Administrator Experience

The Invoice Processing administrator first confirms that either the **Country/Region** field or the **City (Location)** field is included on the Invoice Entry form and editable by the end-user, using the Forms and Fields tool. Next, they use the Audit Rule options to configure the audit rule. When the country set for the invoice is set to Japan or a Japanese city, the audit rule checks the validity of the Vendor Tax ID with the Japanese Government API.

CREATING A CUSTOM AUDIT RULE

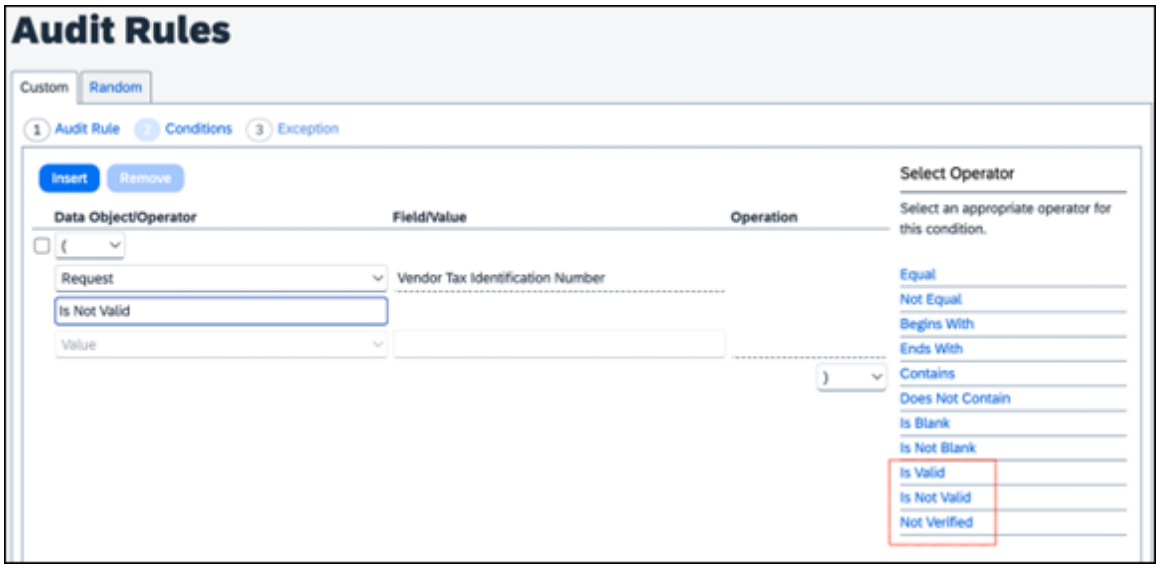
Invoice Processing administrators see **Vendor Tax Verification Number** displayed on the **Audit Rules** page for the **Custom** tab.



Once **Vendor Tax Identification Number** is selected, three new operators now display in the **Select Operator** list:

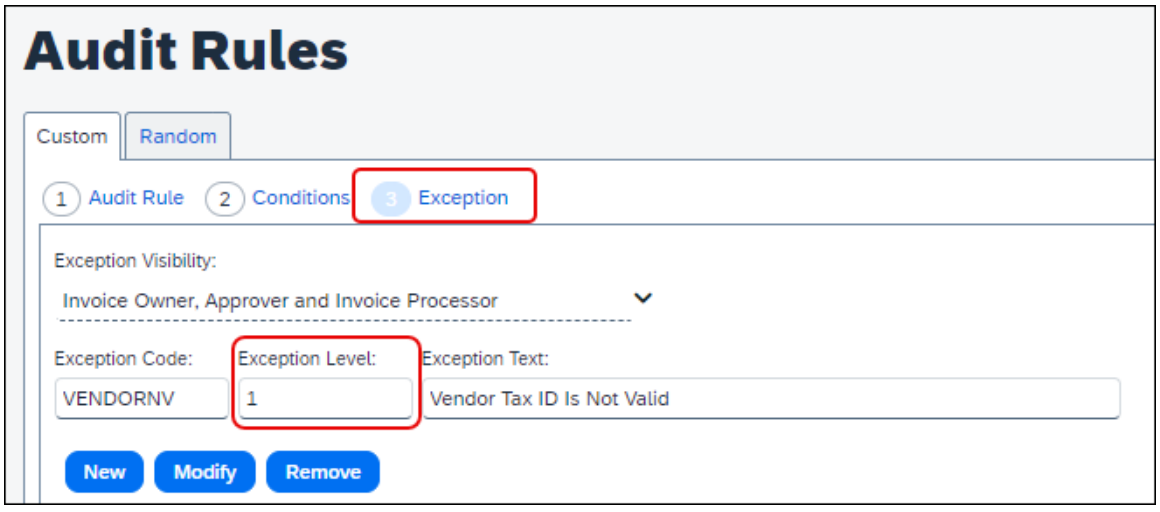
- **Is Valid** – The Vendor Tax ID is registered with the Japan government.
- **Is Not Valid** – The Vendor Tax ID is not registered with the Japan government.
- **Not Verified** – The Vendor Tax ID verification is not completed due to a temporary system issue. Users may need to re-run the audit rule if they want to verify the values.

In the following image, a sample audit rule checks the **Vendor Tax Identification Number** using the **Is Not Valid** operator.



CREATING AN EXCEPTION

If an exception should be created for an invalid ID, that is done using options in step 3, where a number may be assigned that the system uses to allow or block submission.



In the event the internal service is unavailable or returns an error, the invoice returns as "Not Verified". A message may display if the client has configured it for the audit rule. SAP Concur recommends clients use the following message, *"The Vendor Tax ID could not be validated against an external service. Please try again after some time to retry validation. If the error persists, please contact SAP Concur support or your Concur Administrator".*

If the Vendor Tax ID fails validation, the audit rule evaluates the system check as **Is Not Valid**.

If the Vendor Tax ID passes validation, the audit rule evaluates the system check as **Is Valid**.

Configuration / Feature Activation

The option for the Concur Invoice administrators to configure this type of audit rule is automatically available. However, no changes are automatically made to the existing audit rules: the Concur Invoice administrator must proactively configure this type of rule before it will apply to invoices.

📖 For general information, refer to the *Concur Invoice: Audit Rules Setup Guide*.

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

NOTE: The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the *Shared Changes Release Notes*.

Digital Invoices

Planned Changes New PDF Generation for Peppol E-Invoices (Japan)

Information First Published	Information Last Modified	Feature Target Release Date
February 2024	March 08, 2024	April 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Concur Invoice clients in Japan (or those who have employees or configurations in Japan) that are using the Peppol Integration solution will soon be able to view and download a readable PDF version of the Peppol XML file. The PDF will be automatically generated from the Peppol XML e-invoice document and will be accessible through the **View Invoice** option in the invoice.

The generated PDF provides the following benefits:

- Presents the invoice data in a better readable format.
- Allows Invoice Approvers and Processors to compare the invoice record created in Concur Invoice against the generated PDF to reduce instances of fraud.
- Allows all users to verify vendor names from the XML and compare the default vendor selected in the invoice record in Concur Invoice.

📖 For more information on Concur Invoice Peppol Integration, refer to the *Concur Invoice Release Notes* for June 2023 and October 2023.

BUSINESS PURPOSE / CLIENT BENEFIT

This update allows clients to have a human-readable PDFs of their invoicing files for auditing purposes. It also meets the Japanese market requirements by providing a readable PDF version of the XML e-invoice.

Configuration / Feature Activation

This update occurs automatically.

Invoice Pay

Planned Changes New Currencies for ACH/EFT Payments

Information First Published	Information Last Modified	Feature Target Release Date
February 2024	March 8, 2024	April 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

SAP Concur Invoice clients contracted for Invoice Payment Manager and who have a Canadian Dollar (CAD), Euro (EUR), and/or British Pound (GBP) bank account will be able to make low-cost Electronic Funds Transfer (ETF) payments to vendors using the ACH payment method type.

Clients can set up their company's CAD, EUR, and/or GBP bank account in Concur Invoice Payment Manager by creating a funding account with SAP Concur's third-party ACH/EFT payment provider (Worldline) to facilitate invoice payments to their vendors.

Invoice payments are batched in Invoice Payment Manager for clients to review and manage before being sent to the payment provider to be processed. Using the Invoice Payment Confirmation extract or a financial connector application integrated with it, clients can post invoice payments to the ERP/accounting system.

BUSINESS PURPOSE / CLIENT BENEFIT

This update provides Concur Invoice clients, who work with vendors located in Canada, Eurozone countries, and the United Kingdom, the ability to process low-cost EFT invoice payments using Invoice Payment Manager.

Prerequisites

Clients must have Concur Invoice and Invoice Payment Manager on their contract.

Clients must have a bank account in the supported countries and currencies and be able to register it with Worldline.

Supported ACH/EFT Payments

Currency	Country/Region	Payment System	Payment Cycle
Canada Dollar (CAD)	Canada	ACSS	3 Bank Days

Euro (EUR)	Eurozone Countries and territories	SEPA	4 Bank Days
Pound Sterling (GBP)	United Kingdom	BACS	3 Bank Days
*US Dollar (USD) *Existing functionality	United States and territories	ACH	5 Bank Days

NOTE: Cross-border and foreign exchange payments are not supported.

Roles

Users must have the Invoice Payment Manager role to configure ACH/EFT funding accounts and view payment batches.

How it Works

Once the funding account has been reviewed and verified by the payment provider, it can be activated in Concur and invoice payments can begin being batched for processing from it.

Banking information for vendors with a CAD, EUR, or GBP bank account, who are to be paid by EFT, can be added to the client's Concur vendor profile by API, import file, or manual entry. The Pay Method Type in the vendor profile should be set to *ACH* for new invoices to default to be paid by EFT. A remittance email with payment and invoice details can be sent to email addresses populated in the **Contact Email Address** field.

In Concur Invoice, clients create, approve, and post to their ERP/accounting system invoices with the ACH pay method type the same way as invoices with other payment methods. After completing the approval workflow, approved ACH invoices are batched to be paid by EFT from the funding account in Invoice Payment Manager. Based on the invoice payment due date and batch settings configured in the funding account, the system automatically assigns the invoice to a batch schedule to be processed so the EFT payment credits the vendor's bank account on the payment due date.

Clients can view and manage payment batches on the **Monitor Payments** page in Invoice Payment Manager. After a batch closes, the payments are sent to the payment provider to be processed and the remittance email is sent to the vendor contact.

Invoices are updated to a Paid payment status on the funding date of the batch when monies for the total batch amount are debited from the client's bank account with which the Concur funding account is associated. Clients can then extract the invoice payments from Concur to post to their ERP/accounting system with the Invoice Payment Confirmation API or extract file.

NOTE: The invoice, the funding account the payment debited from, and the vendor bank account the payment is credited to, must **all** be the same currency for a payment to be processed.

Configuration / Feature Activation

SAP Concur staff must enable the Invoice Pay settings for clients for them to be able to create funding accounts.

📖 For more information about creating funding accounts, refer to the *Concur Invoice Pay Setup Guide*.

Vendor Management

Planned Changes SAP Business Partner Screening Solution Now Performs Automatic Online Screening

Information First Published	Information Last Modified	Feature Target Release Date
December 2023	March 8, 2024	April 11, 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

SAP Concur now performs automatic online screening of vendors (suppliers) within Concur Invoice Vendor Management using the SAP Business Partner Screening (BPS) solution. Previously, SAP Concur performed offline screening of vendors (suppliers) within Concur Invoice Vendor Management using the SAP Business Partner Screening (BPS) solution.

📖 For more information, refer to the *Vendor Management | SAP Business Partner Screening Solution (August 11)* release note published in the *Concur Invoice Release Notes* for August 2023.

The BPS solution is used to prevent prohibited vendors in embargoed countries or regions, or in sanctioned entities listed by the various applicable government agencies, from performing business activities with SAP products.

SAP policy prohibits the use of all SAP products and services in, from, or in support of, any business activities in locations where SAP products and services are not available. This list includes Cuba (CU), Iran (IR), North Korea (KP), Syria (SY), and regions of the Ukraine (Donestsk, Luhansk, and Crimea). This change also impacts the following currencies Cuba, Peso (CUC and CUP); North Korean Won (KPW); Syria, Pound (SYP); Iran, Rial (IRR).

When users try to submit an invoice for vendors that are identified as having a Sanctioned or Invalid status during BPS screening, invoice submission will be blocked. Only invoices for vendors that passed BPS screening will be extracted to the financial system for payment.

With the release of the new automatic online screening update, this feature release also includes:

- Four new screening statuses in the **Screening Status** column on the **Vendor Managers** page
- A new *Screening Status* option in the **Search** list on the **Manage Vendors** page
- The ability to recall invoices for re-screening
- New alert messages for vendor invoice status during BPS screening
- Audit trail tracking of Export Trade Sanctions (ETS) categories, status codes, and screening statuses
- The ability to block submission of purchase requests (PR) and purchase orders (PO) for vendors with a Sanctioned or Invalid status during BPS Screening.

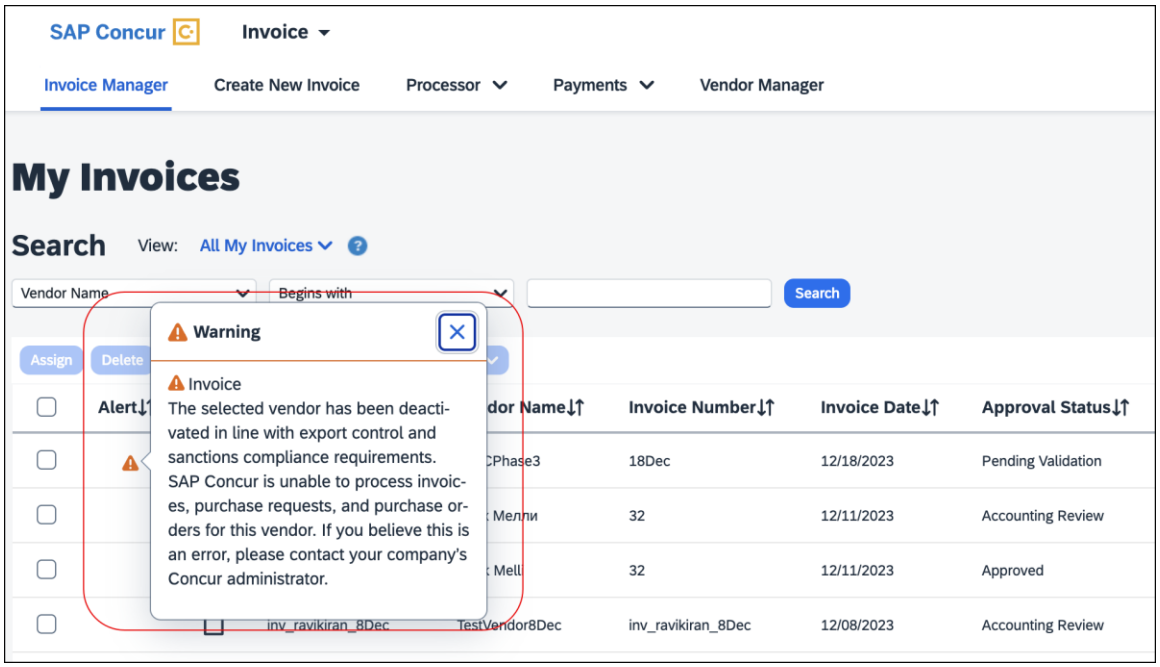
BUSINESS PURPOSE / CLIENT BENEFIT

This change ensures clients follow local, national, and international laws governing embargoed countries and sanctioned individuals/entities and are systematically protected to the best ability from malicious actors and actions when working with SAP Concur products.

End User Experience

VIEW ALERT MESSAGES

After invoice submission, users now see additional alerts displayed on the **My Invoices** page in **Invoice Manager** to track vendor invoices during BPS screening status.



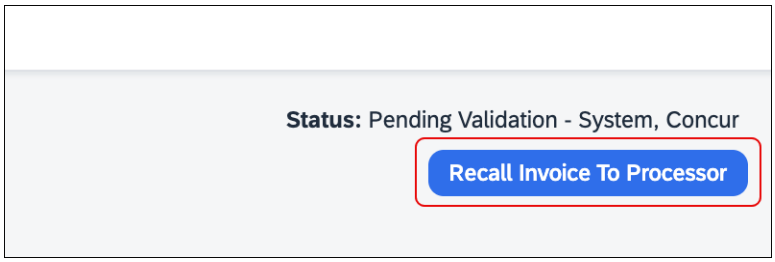
Alerts that may display include:

- **Sanctioned:** *The selected vendor has been deactivated in line with SAP Export Control and Sanctions Compliance requirements. SAP Concur is unable to process invoices, purchase requests, and purchase orders for this vendor. If you believe this is an error, please contact your company's Concur administrator.*
- **Pending Review:** *The selected vendor in this invoice is currently under review as part of SAP's Export Control and Sanctions Compliance policy. We appreciate your patience as we are processing your request as quickly as possible.*
- **System Pending:** *The selected vendor in this invoice is currently under review as part of SAP's Export Control and Sanctions Compliance policy. We appreciate your patience as we are processing your request as quickly as possible.*
- **Invalid:** *At this time, SAP Concur is unable to support the selected vendor as the information appears incomplete or inaccurate. Please ensure the full legal name of the company or individual and their full address (street, city, state (if applicable), and country/region) are complete and accurate in the vendor record.*

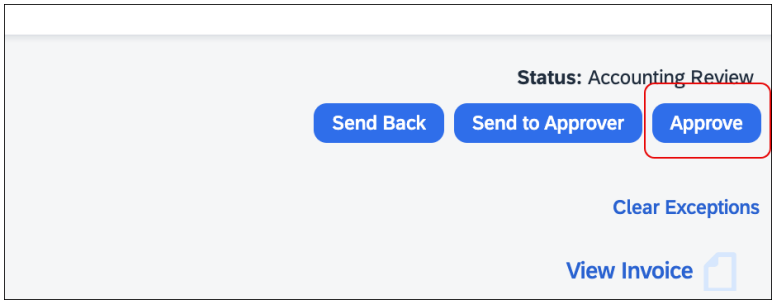
RECALL INVOICES FOR RE-SCREENING

If the vendor does not pass the BPS screening at the Prepayment Validation state, invoices with the vendor are placed on hold and an alert message displays for the invoice. Users can recall the invoice to the processor and approve it to initiate re-screening. If the vendor passes re-screening, invoices with the vendor will be extracted for payment. Otherwise, the invoices will continue to be placed in a hold status.

On the invoice record, users can click the **Recall Invoice to Processor** button to recall the invoice.



Users can then click the **Approve** button to re-submit the invoice for re-screening.



VIEW THE AUDIT TRAIL

When a vendor's screening status is changed, this change is logged and documented in the audit trail with the Export Trade Sanctions (ETS) Category, status code, and the screening status. Users can reference the following table to understand the categories and codes documented in the audit trail.

ETS Category (Available in Audit Trail)	Status Code (Available in Audit Trail)	Screening Status (Available statuses in the Screening Status column on the Manage Vendors Page)
ETS1	01	Sanctioned
ETS3	01	Sanctioned
ETS4	01	Sanctioned
ETOK	02	Passed
ETS2	04	Pending Review

EX30	30	System Pending
EX31	31	Invalid
EX32	32	Translation in progress

SEARCH FOR VENDORS BY SCREENING STATUS

Users can search for vendors by selecting *Screening Status* in the **Search** list on the **Manage Vendors** page.

SUBMIT PURCHASE REQUESTS AND PURCHASE ORDERS

When users submit a purchase request for vendors that are identified as having a Sanctioned or Invalid status during BPS screening, purchase request submission is blocked.

When a user submits a purchase order created from a purchase request, and the purchase order for the vendor is identified as having a Sanctioned or Invalid status during BPS screening, PO transmission is blocked.

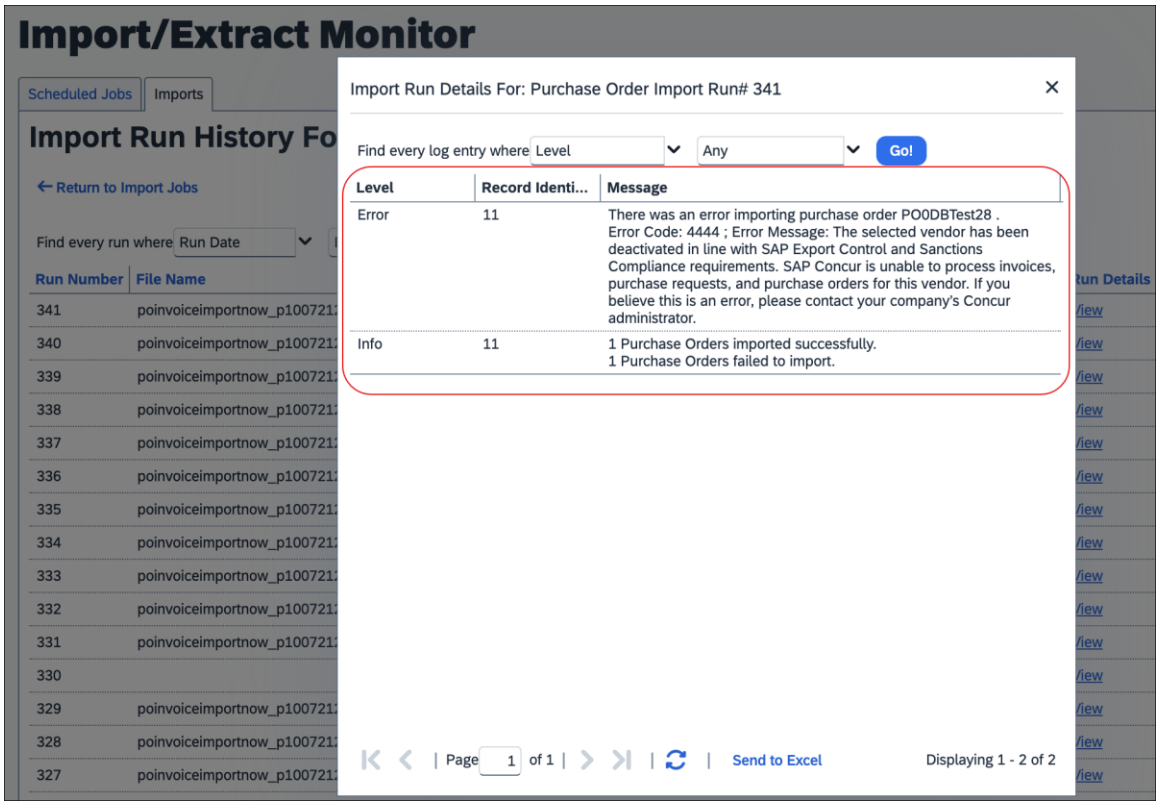
APIs and Imports for PR/PO

When users create a purchase request using Purchase Request v4 API, and the purchase request is created for vendors that are identified as having a Sanctioned or Invalid status during BPS screening, purchase request auto submission is blocked.

When users create a purchase order using Purchase Order v3 API or from the PO Import file for vendors that are identified as having a Sanctioned or Invalid status during BPS screening, purchase order creation or import is blocked.

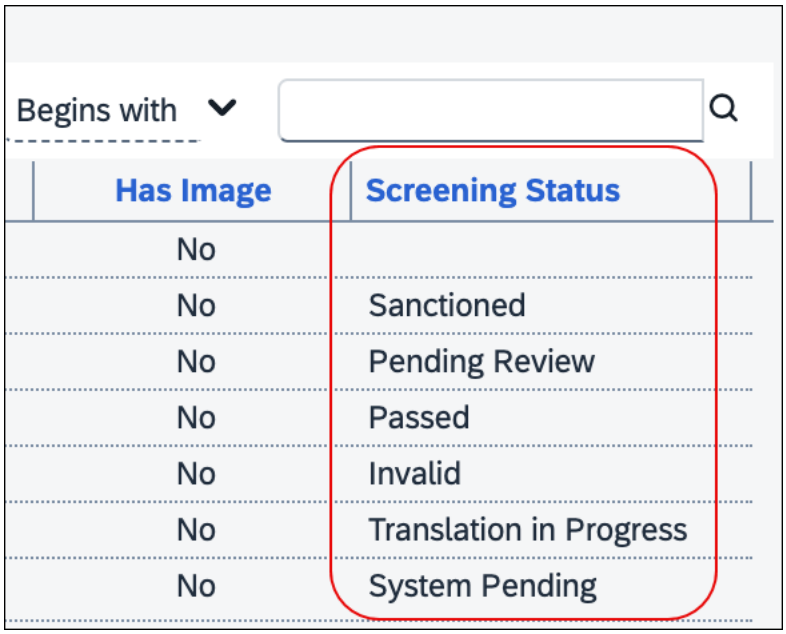
When user updates a purchase order using Purchase Order v3 API or the PO Import file for vendors that are identified as having a Sanctioned or Invalid status during BPS screening, purchase order update is blocked.

The following image is an example of messages that display in the **Import Run Details For: Purchase Order Import Run** window when invoices are imported successfully, fail, or have errors.



Vendor Manager Experience

Vendor Managers now see four new screening statuses display in the **Screening Status** column on the **Manage Vendors** page.



The **Screening Status** column displays four new status results based on BPS screening:

- **Passed:** Vendors that passed the BPS screening and can be used without restrictions.
- **Pending Review:** Vendors that require manual review by SAP Export Control Operations.
- **System Pending:** Vendors that are in the queue for BPS screening once the system is back online.
- **Translation in Progress:** Vendors that have non-Latin or special characters present and are currently being translated for BPS screening.

Configuration / Feature Activation

This change occurs automatically.

📖 For more information, refer to *Concur Invoice: Vendor Manager User Guide.*

Client Notifications

Accessibility

Accessibility Updates

SAP implements changes to better meet current Web Content Accessibility Guidelines (WCAG). Information about accessibility-related changes made to SAP Concur solutions is published on a quarterly basis. You can review the quarterly updates on the Accessibility Updates page.

Gender Diversity

Gender Diversity Planned Features and Changes

SAP Concur is committed to supporting gender diversity. Over time we plan to implement product changes to help ensure that SAP Concur solutions support gender non-binary users. These changes will include but are not limited to support for preferred names, non-binary gender options in travel preferences, and non-binary titles.

These planned changes reflect SAP's commitment to supporting gender diversity and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the SAP Concur release notes.

In-Product User Assistance

Client Customized Content

If your company creates customized content for SAP Concur solutions through a user assistance tool such as SAP Enable Now or Concur User Assistant by WalkMe, the changes described in these release notes might affect your customized content. SAP Concur recommends reviewing the monthly release notes for all your SAP Concur solutions as well as the Shared Changes Release Notes to confirm whether any of the planned or released changes might impact your internal, customized content.

If any changes in a release impact your content, work with your internal teams to update your content accordingly.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available from the SAP Sub-processors / Data Transfer Factsheets page.

To access the SAP Concur Sub-processors List:

1. Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page:
   SAP Sub-processors / Data Transfer Factsheets
2. Sign in to the SAP Support Portal using your Support User ID (S-user) and password.

   NOTE: SAP customers must sign in to the SAP Support Portal using their Support User ID (S-user) and password. For information about S-User IDs, refer to *Your New Support User ID (S-user)* and to the Learn All About S-User IDs blog post.
3. On the SAP Sub-processors / Data Transfer Factsheets page, type Concur in the **Search** field.
4. In the **Title** column, click **SAP Concur Sub-processors List**.

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Supported Configurations

Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the *Concur Travel & Expense Supported Configurations* guide.

When changes to browser support are planned, information about those changes will also appear in the *Shared Changes Release Notes.*.

SAP Concur Support Case Status

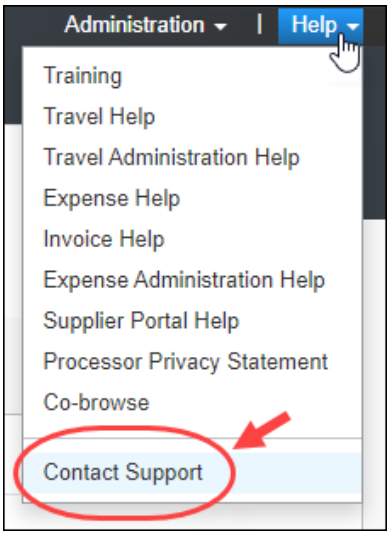
This release might resolve previously submitted support cases. You can check the status of a support case to confirm whether the case issue has been resolved.

Check Support Case Status

The steps in this procedure provide instructions for checking whether a case is resolved.

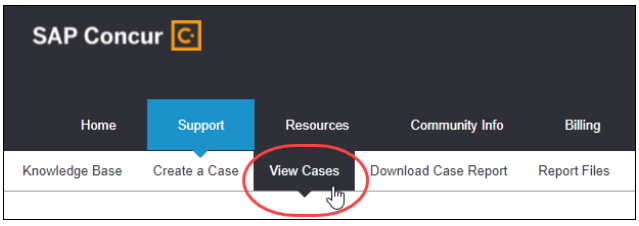
To check the status of a submitted case:

1. Log on to https://concursolutions.com/portal.asp.
2. Click **Help > Contact Support**.

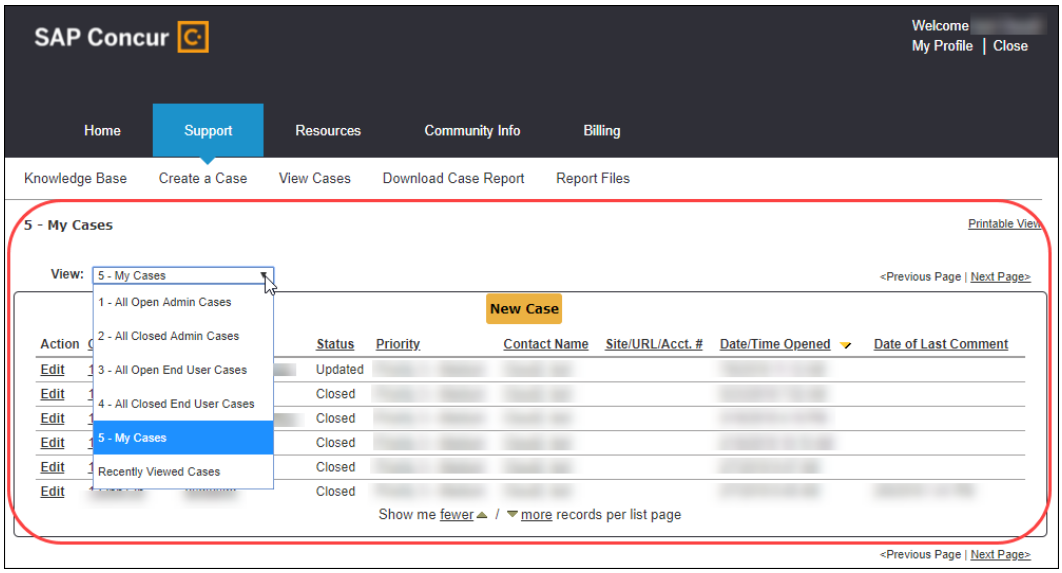


NOTE: If you do not have the option to contact SAP Concur support in the **Help** menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

3. Click **Support > View Cases**.



In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

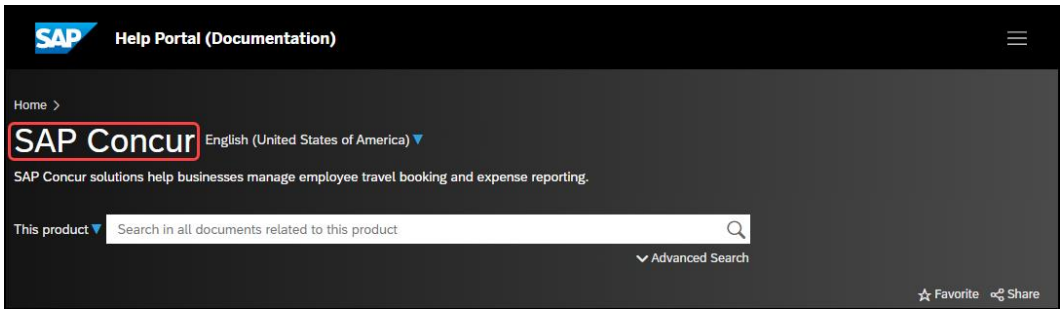


Additional Release Notes and Other Technical Documentation

Online Help

You can access release notes, setup guides, user guides, admin summaries, supported configurations, and other resources via the in-product Help menu or on the SAP Help Portal.

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the SAP Concur solutions page.



SAP Concur Support Portal – Selected Users

Access release notes, webinars, and other technical documentation on the SAP Concur support portal.

If you have the required permissions, **Contact Support** is available on the SAP Concur **Help** menu and in the SAP Concur page footer.

Click **Contact Support** to access the SAP Concur support portal, then click **Resources**.

- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.

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AP Concur Release Notes

Concur Invoice Professional/Premium

Includes: Concur Invoice, Capture Processing, Invoice Pay, Purchase Requests and Purchase Orders

Month	Audience
Release: April 2024 Initial Post: April 19, 2024	Client ***FINAL***

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Release Notes

This document contains the release notes for Concur Invoice for professional edition.

NOTE: Features and changes that apply to SAP Concur site-wide or to multiple products/services are documented in the *Shared Changes Release Notes*. For information about site-wide or shared changes in this release that might impact your SAP Concur solutions, refer to the *Shared Changes Release Notes*.

Concur Invoice UX Evolution

Ongoing Updated User Interface (UI) for Concur Invoice End Users

Information First Published	Information Last Modified	Automatic Transition Date
July 14, 2023	April 12, 2024	To Be Determined
Any changes since the previous monthly release are highlighted in yellow in this release note.		

This change is part of the Concur Invoice UX Evolution experience.

Overview

The continued evolution of the Concur Invoice solution user interface (UI) experience is the result of thoughtful design and research that provides a modern, intuitive, and streamlined experience for the invoice process.

Customers will have the ability to preview and then opt in to the new UI for Concur Invoice before the automatic transition date.

BUSINESS PURPOSE / CLIENT BENEFIT

The result is the evolution of the Concur Invoice user interface designed to provide a modern, consistent, and streamlined user experience. The new UI focuses on consistency across SAP Concur Spend offerings, and includes several significant enhancements requested by clients. Focus areas include end-user efficiency when interacting with invoices, performance and stability, as well as accessibility compliance.

Products and Users Affected

To take advantage of these improvements, Concur Invoice customers will be required to transition to the new UI at a future date to be determined. The following sections provide information about the timeline and resources available to ensure this process is smooth and efficient for all users.

The new UI changes apply to:

- Concur Invoice (Professional/Premium and Standard) end users only

IMPORTANT: Timeline and Milestones

There are four important milestones for Concur Invoice customers as they transition from the current UI to the new UI.

1. **Early Adopter Care (EAC) Period**: August 2023 – Ongoing in 2024

   We are currently in the Early Adopter Care Period: During this time, the new UI is available to preview for customers participating in the Early Adopter Care Program. We encourage administrators and power users to use the Early Adopter Care Period to preview the refreshed interface, update internal training materials, and prepare the organization for the transition.

   NOTE: During the Early Adopter Care Period, not all planned features from the current UI will be available in new UI for Concur Invoice. New features and enhancements continue to be planned for future releases. ***The Early Adopter Care Period is intended to let customers get a head start on learning about the new UI and preparing for the transition.***

   If your organization is interesting in participating in the Early Adopter Care Program, please refer to the SAP Early Adopter Care page for more information.

2. **Opt-In Period:** Targeted for Q2 2024

   Following the Early Adopter Care Period there will be an open Opt-In Period. This milestone will be marked by the delivery of most planned features as well as further overall product quality and stability. The Opt-In Period will be available to all Concur Invoice customers.

   Customers should use this period to plan their transition and move to the new UI for Concur Invoice when it is right for your business priorities. Some remaining features will become available throughout this period, so customers should plan their roll out accordingly.

3. **Active Move Period:** To be determined

   All customers will be required to move to the new UI. The first day of the Active Move Period is the first day of the 12-month notice period we committed to for customers to complete the transition at their own pace before the automatic transition date.

   Customers are strongly encouraged to complete the tasks necessary to ensure a smooth transition for their organization and then transition during the Active Move Period.

4. **Automatic Transition Date:** To be determined

   All customers will be automatically transitioned to the new UI. This ensures that we continue to offer a consistent user experience for all customers and allows for superior product innovation and support.

Transition Information – Guides and Other Resources

We will provide guide updates, online help updates, release notes, and other resources to help in the transition.

Examples of where to find information about the new UI:

- **Setup and user guides, FAQs, transition resources:** During the transition from the current UI to the new UI, the Concur Invoice setup and user guides will be updated to include information about the new UI in addition to the current UI.

  Along with the guide updates, there are other resources (such as an FAQ), and a list of features that are not yet available in the new UI. All these materials can be used to help customers prepare their users.
- **SAP Help Portal:** Concur Invoice topics will also be updated for the new UI in the Concur Invoice | SAP Help Portal. During the transition from the current UI to the new UI, the topics will include information about the current UI and the new UI.
- **Release information:** Release notes for enhancements associated with the new UI will be provided in the monthly Concur Invoice release notes. Release notes for the new UI will be clearly marked in the monthly release notes.

Get Started

Customers are encouraged to use the transition information described above and develop a plan for the transition.

More Information

Additional information will be available in future release notes.

Feature Availability

The Invoice UX Evolution user interface will be applied to specific Concur Invoice features in a phased approach during the Early Adopter and Opt-In milestones. There are some Concur Invoice features that the Invoice UX Evolution user interface will not be applied to during the Early Adopter or Opt-In milestones.

Use the following table to view which Concur Invoice features are currently updated with the Invoice UX Evolution user interface. The table also indicates whether a feature is a major or minor feature and which features will not be updated with the new user interface.

NOTE: Clients using the major features listed in the Major Features section of the table should ***not*** move to the Invoice UX Evolution UI until the major features they are using are available in the Invoice UX Evolution UI.

Feature Availability for Invoice UX Evolution		
Feature Name	**Available?**	**Notes**
Major Features		
Attendees	No	Parity Professional Only
Auto-Save	Early Adopter Care (EAC) Period	New Professional | Standard
CFDI (Comprobantes Fiscal Digital por Internet) (Mexico)	No	Parity Professional | Standard
Create/Edit Invoice	EAC	Parity – with the new create and edit invoice workflow Professional | Standard
E-Bunsho	No	Parity Professional | Standard
Editing Allocations	EAC	Parity Professional | Standard
Expense Type Connected List	No	Parity Professional Only
Greater than 15 Line Items can be added in the Itemization section on the Create New Invoices page	No	New Professional | Standard
Line-Item Entry in the Itemization section on the Create New Invoices page	EAC	New Professional | Standard
Multiple VAT Field Support (Canada)	No	Parity Professional | Standard
PO Matching	EAC	Parity Professional | Standard
Recurring Invoices	EAC	Parity Professional | Standard
Tax Authority & Tax Validation Service	No	Parity Professional | Standard

Minor Features		
Approver navigation to invoices in new UI	No	Parity – with new workflow Professional | Standard
Auto Resize – View Port	EAC	New Professional | Standard
Cost Object Approval Filtering	No	Parity Professional | Standard
Default Image In Line	EAC	Parity Professional | Standard
Drag and Drop Images	EAC	New Professional | Standard
Enhanced Comments	EAC	Parity Professional | Standard
Enhanced Bulk Update Tools	No	New - Some Parity Professional | Standard
Invoice Owner Improvements	EAC	Parity – with new workflow Professional | Standard
Line-Item Entry Improvements – Custom Fields	EAC	Parity – with new workflow Professional | Standard
Processor navigation to invoices in new UI	EAC	Parity – with new workflow Professional | Standard
Switch Tax Mode Improvements	EAC	Parity – with new workflow Professional | Standard
Submit/Assign Button Improvements	EAC	Parity – with new workflow Professional | Standard
Unassigned Invoices List screen – Record Locking	EAC	New Professional | Standard
VAT Tax Mode	EAC	Parity – with new workflow Professional | Standard
Other Minor Parity Features	No	Parity Professional | Standard
Features that will not have the Invoice UX Evolution User Interface		
Concur Invoice Administration	No	
Approvals Invoice List	No	

Capture Processing	No	
Invoice Pay	No	
Processor Invoice List	No	

Invoice Pay

New Currencies for ACH/EFT Payments

Overview

Concur Invoice clients contracted for Invoice Payment Manager and who have a Canadian Dollar (CAD), Euro (EUR), and/or British Pound (GBP) bank account are now able to make low-cost Electronic Funds Transfer (ETF) payments to vendors using the ACH payment method type.

Clients can set up their company's CAD, EUR, and/or GBP bank account in Concur Invoice Payment Manager by creating a funding account with SAP Concur's third-party ACH/EFT payment provider (Worldline) to facilitate invoice payments to their vendors.

Invoice payments are batched in Invoice Payment Manager for clients to review and manage before being sent to the payment provider to be processed. Using the Invoice Payment Confirmation extract or a financial connector application integrated with it, clients can post invoice payments to the ERP/accounting system.

BUSINESS PURPOSE / CLIENT BENEFIT

This update provides Concur Invoice clients, who work with vendors located in Canada, Eurozone countries, and the United Kingdom, the ability to process low-cost EFT invoice payments using Invoice Payment Manager.

Prerequisites

Clients must have Concur Invoice and Invoice Payment Manager on their contract.

Clients must have a bank account in the supported countries and currencies and be able to register it with Worldline.

Supported ACH/EFT Payments

Currency	Country/Region	Payment System	Payment Cycle
Canada Dollar (CAD)	Canada	ACSS	3 Bank Days
Euro (EUR)	Eurozone Countries and territories	SEPA	4 Bank Days

Pound Sterling (GBP)	United Kingdom	BACS	4 Bank Days
*US Dollar (USD) *Existing functionality	United States and territories	ACH	5 Bank Days

NOTE: Cross-border and foreign exchange payments are not supported.

Roles

Users must have the Invoice Payment Manager role to configure ACH/EFT funding accounts and view payment batches.

How it Works

Once the funding account has been reviewed and verified by the payment provider, it can be activated in Concur and invoice payments can begin being batched for processing from it.

Banking information for vendors with a CAD, EUR, or GBP bank account, who are to be paid by EFT, can be added to the client's Concur vendor profile by API, import file, or manual entry. The Pay Method Type in the vendor profile should be set to *ACH* for new invoices to default to be paid by EFT. A remittance email with payment and invoice details can be sent to email addresses populated in the **Contact Email Address** field.

In Concur Invoice, clients create, approve, and post to their ERP/accounting system invoices with the ACH pay method type the same way as invoices with other payment methods. After completing the approval workflow, approved ACH invoices are batched to be paid by EFT from the funding account in Invoice Payment Manager. Based on the invoice payment due date and batch settings configured in the funding account, the system automatically assigns the invoice to a batch schedule to be processed so the EFT payment credits the vendor's bank account on the payment due date.

Clients can view and manage payment batches on the **Monitor Payments** page in Invoice Payment Manager. After a batch closes, the payments are sent to the payment provider to be processed and the remittance email is sent to the vendor contact.

Invoices are updated to a Paid payment status on the funding date of the batch when monies for the total batch amount are debited from the client's bank account with which the Concur funding account is associated. Clients can then extract the invoice payments from Concur to post to their ERP/accounting system with the Invoice Payment Confirmation API or extract file.

NOTE: The invoice, the funding account the payment debited from, and the vendor bank account the payment is credited to, must **all** be the same currency for a payment to be processed.

Configuration / Feature Activation

SAP Concur staff must enable the Invoice Pay settings for clients for them to be able to create funding accounts.

📖 For more information about creating funding accounts, refer to the *Concur Invoice Pay Setup Guide*, *Concur Invoice Pay User Guide, Concur Invoice: Vendor Import V3 (Current) Specification,* and *Concur Invoice: Vendor Banking Import User Guide*.

Vendor Management

SAP Business Partner Screening Solution Now Performs Automatic Online Screening

Overview

SAP Concur now performs automatic online screening of vendors (suppliers) within Concur Invoice Vendor Management using the SAP Business Partner Screening (BPS) solution. Previously, SAP Concur performed offline screening of vendors (suppliers) within Concur Invoice Vendor Management using the SAP Business Partner Screening (BPS) solution.

📖 For more information, refer to the *Vendor Management* | *SAP Business Partner Screening Solution (August 11)* release note published in the *Concur Invoice Release Notes* for August 2023.

The BPS solution is used to prevent prohibited vendors in embargoed countries or regions, or in sanctioned entities listed by the various applicable government agencies, from performing business activities with SAP products.

SAP policy prohibits the use of all SAP products and services in, from, or in support of, any business activities in locations where SAP products and services are not available. This list includes Cuba (CU), Iran (IR), North Korea (KP), Syria (SY), and regions of the Ukraine (Donestsk, Luhansk, and Crimea). This change also impacts the following currencies Cuba, Peso (CUC and CUP); North Korean Won (KPW); Syria, Pound (SYP); Iran, Rial (IRR).
When users try to submit an invoice for vendors that are identified as having a Sanctioned, Pending Review, or Invalid status during BPS screening, invoice submission will be blocked. Only invoices for vendors that passed BPS screening will be extracted to the financial system for payment.
With the release of the new automatic online screening update, this feature release also includes:

- Four new screening statuses in the **Screening Status** column on the **Vendor Managers** page
- A new *Screening Status* option in the **Search** list on the **Manage Vendors** page
- The ability to recall invoices for re-screening
- New alert messages for vendor invoice status during BPS screening

- Audit trail tracking of Export Trade Sanctions (ETS) categories, status codes, and screening statuses
- The ability to block submission of purchase requests (PR) and purchase orders (PO) for vendors with a Sanctioned or Invalid status during BPS Screening.

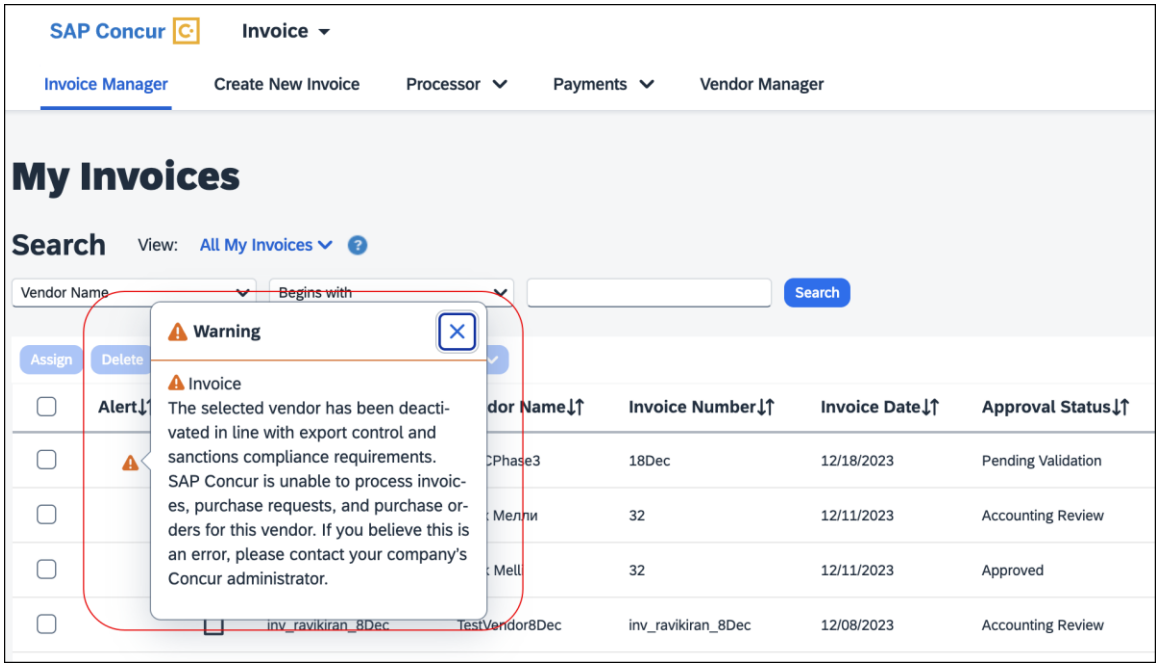
BUSINESS PURPOSE / CLIENT BENEFIT

This change ensures clients follow local, national, and international laws governing embargoed countries and sanctioned individuals/entities and are systematically protected to the best ability from malicious actors and actions when working with SAP Concur products.

End User Experience

VIEW ALERT MESSAGES

After invoice submission, users now see additional alerts displayed on the **My Invoices** page in **Invoice Manager** to track vendor invoices during BPS screening status.



Alerts that may display include:

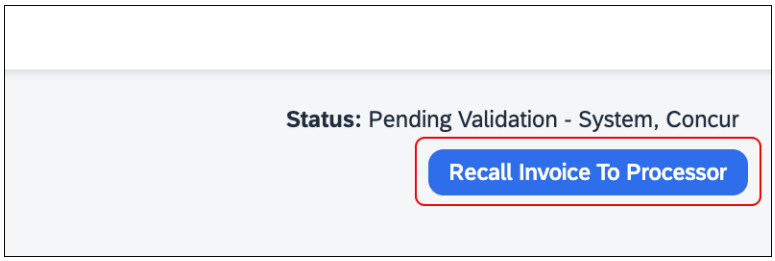
- **Sanctioned:** *The selected vendor has been deactivated in line with SAP Export Control and Sanctions Compliance requirements. SAP Concur is unable to process invoices, purchase requests, and purchase orders for this vendor. If you believe this is an error, please contact your company's Concur administrator.*
- **Pending Review:** *The selected vendor in this invoice is currently under review as part of SAP's Export Control and Sanctions Compliance policy. We appreciate your patience as we are processing your request as quickly as possible.*

- **System Pending:** *The selected vendor in this invoice is currently under review as part of SAP's Export Control and Sanctions Compliance policy. We appreciate your patience as we are processing your request as quickly as possible.*
- **Invalid:** *At this time, SAP Concur is unable to support the selected vendor as the information appears incomplete or inaccurate. Please ensure the full legal name of the company or individual and their full address (street, city, state (if applicable), and country/region) are complete and accurate in the vendor record.*

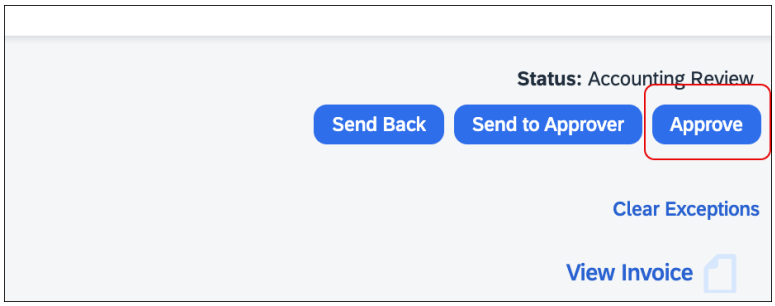
RECALL INVOICES FOR RE-SCREENING

In the unlikely event of a vendor not passing the BPS screening at the Prepayment Validation state, invoices with the vendor are placed on hold and an alert message displays for the invoice. Users can recall the invoice to the processor and approve it to initiate re-screening. If the vendor passes re-screening, invoices with the vendor will be extracted for payment. Otherwise, the invoices will continue to be placed in a hold status.

On the invoice record, users can click the **Recall Invoice to Processor** button to recall the invoice.



Users can then click the **Approve** button to re-submit the invoice for re-screening.



VIEW THE AUDIT TRAIL

When a vendor's screening status is changed, this change is logged and documented in the audit trail with the Export Trade Sanctions (ETS) Category, status code, and the screening status. Users can reference the following table to understand the

categories and codes documented in the audit trail.

ETS Category (Available in Audit Trail)	Status Code (Available in Audit Trail)	Screening Status (Available statuses in the Screening Status column on the Manage Vendors Page)
ETS1	01	Sanctioned
ETS3	01	Sanctioned
ETS4	01	Sanctioned
ETOK	02	Passed
ETS2	04	Pending Review
EX30	30	System Pending
EX31	31	Invalid
EX32	32	Translation in progress

SEARCH FOR VENDORS BY SCREENING STATUS

Users can search for vendors by selecting *Screening Status* in the **Search** list on the **Manage Vendors** page.

SUBMIT PURCHASE REQUESTS AND PURCHASE ORDERS

When users submit a purchase request for vendors that are identified as having a Sanctioned, Pending Review, or Invalid status during BPS screening, purchase request submission is blocked.

When a user submits a purchase order created from a purchase request, and the purchase order for the vendor is identified as having a Sanctioned, Pending Review, or Invalid status during BPS screening, PO transmission is blocked.

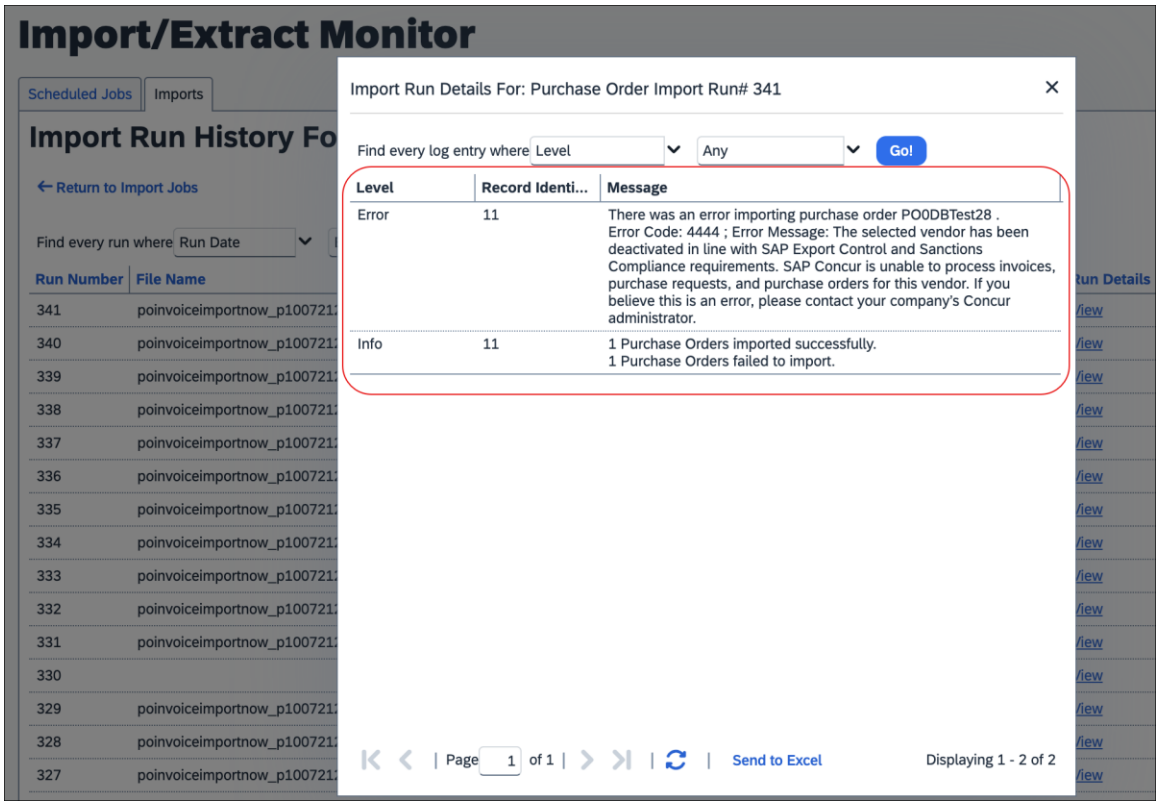
APIs and Imports for PR/PO

When users create a purchase request using Purchase Request v4 API, and the purchase request is created for vendors that are identified as having a Sanctioned, Pending Review, or Invalid status during BPS screening, purchase request auto submission is blocked.

When users create a purchase order using Purchase Order v3 API or from the PO Import file for vendors that are identified as having a Sanctioned, Pending Review, or Invalid status during BPS screening, purchase order creation or import is blocked.

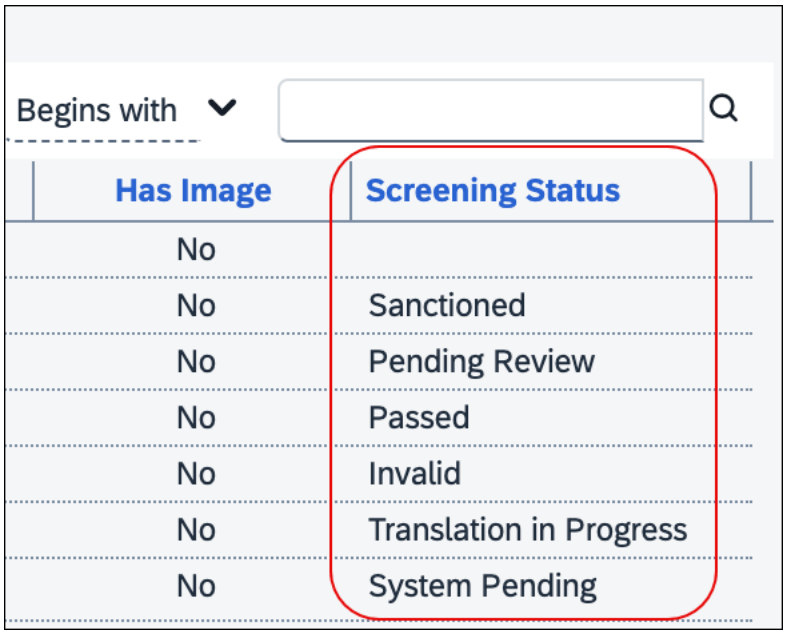
When user updates a purchase order using Purchase Order v3 API or the PO Import file for vendors that are identified as having a Sanctioned, Pending Review, or Invalid status during BPS screening, purchase order update is blocked.

The following image is an example of messages that display in the **Import Run Details For: Purchase Order Import Run** window when invoices are imported successfully, fail, or have errors.



Vendor Manager Experience

Vendor Managers now see four new screening statuses display in the **Screening Status** column on the **Manage Vendors** page.



The **Screening Status** column displays four new status results based on BPS screening:

- **Passed:** Vendors that passed the BPS screening and can be used without restrictions.
- **Pending Review:** Vendors that require manual review by SAP Export Control Operations.
- **System Pending:** Vendors that are in the queue for BPS screening once the system is back online.
- **Translation in Progress:** Vendors that have non-Latin or special characters present and are currently being translated for BPS screening.

Configuration / Feature Activation

This change occurs automatically.

📖 For more information, refer to *Concur Invoice: Vendor Manager User Guide.*

Planned Changes

The items in this section are targeted for future releases. SAP Concur reserves the right to postpone implementation of – or completely remove – any enhancement/change mentioned here.

NOTE: The planned changes listed in this document are specific to this product. For information about planned site-wide or shared changes that might impact your SAP Concur solutions, refer to the *Shared Changes Release Notes*.

Digital Invoices

Planned Changes New PDF Generation for Peppol E-Invoices (Japan)

Information First Published	Information Last Modified	Feature Target Release Date
February 2024	April 12, 2024	May 2024
Any changes since the previous monthly release are highlighted in yellow in this release note.		

Overview

Concur Invoice clients in Japan (or those who have employees or configurations in Japan) that are using the Peppol Integration solution will soon be able to view and download a readable PDF version of the Peppol XML file. The PDF will be automatically generated from the Peppol XML e-invoice document and will be accessible through the **View Invoice** option in the invoice.

The generated PDF provides the following benefits:

- Presents the invoice data in a better readable format.
- Allows Invoice Approvers and Processors to compare the invoice record created in Concur Invoice against the generated PDF to reduce instances of fraud.
- Allows all users to verify vendor names from the XML and compare the default vendor selected in the invoice record in Concur Invoice.

📖 For more information on Concur Invoice Peppol Integration, refer to the *Concur Invoice Release Notes* for June 2023 and October 2023.

BUSINESS PURPOSE / CLIENT BENEFIT

This update allows clients to have a human-readable PDFs of their invoicing files for auditing purposes. It also meets the Japanese market requirements by providing a readable PDF version of the XML e-invoice.

Configuration / Feature Activation

This update occurs automatically.

Client Notifications

Accessibility

Accessibility Updates

SAP implements changes to better meet current Web Content Accessibility Guidelines (WCAG). Information about accessibility-related changes made to SAP Concur solutions is published on a quarterly basis. You can review the quarterly updates on the Accessibility Updates page.

Gender Diversity

Gender Diversity Planned Features and Changes

SAP Concur is committed to supporting gender diversity. Over time we plan to implement product changes to help ensure that SAP Concur solutions support gender non-binary users. These changes will include but are not limited to support for preferred names, non-binary gender options in travel preferences, and non-binary titles.

These planned changes reflect SAP's commitment to supporting gender diversity and enable gender non-binary users to enter consistent information when making travel arrangements and entering personal information into SAP Concur solutions.

Timelines and details about these ongoing changes will be provided in the SAP Concur release notes.

In-Product User Assistance

Client Customized Content

If your company creates customized content for SAP Concur solutions through a user assistance tool such as SAP Enable Now or Concur User Assistant by WalkMe, the changes described in these release notes might affect your customized content. SAP Concur recommends reviewing the monthly release notes for all your SAP Concur solutions as well as the Shared Changes Release Notes to confirm whether any of the planned or released changes might impact your internal, customized content.

If any changes in a release impact your content, work with your internal teams to update your content accordingly.

Subprocessors

SAP Concur Non-Affiliated Subprocessors

The list of non-affiliated subprocessors is available from the SAP Sub-processors / Data Transfer Factsheets page.

To access the SAP Concur Sub-processors List:

1. Click the following link to navigate to the SAP Sub-processors / Data Transfer Factsheets page:
   SAP Sub-processors / Data Transfer Factsheets
2. Sign in to the SAP Support Portal using your Support User ID (S-user) and password.

   NOTE: SAP customers must sign in to the SAP Support Portal using their Support User ID (S-user) and password. For information about S-User IDs, refer to *Your New Support User ID (S-user)* and to the Learn All About S-User IDs blog post.
3. On the SAP Sub-processors / Data Transfer Factsheets page, type Concur in the **Search** field.
4. In the **Title** column, click **SAP Concur Sub-processors List**.

If you have questions or comments, please reach out to: Privacy-Request@Concur.com

Supported Configurations

Supported Browsers and Changes to Support

For information about supported browsers and planned changes to supported browsers, refer to the *Concur Travel & Expense Supported Configurations* guide.

When changes to browser support are planned, information about those changes will also appear in the *Shared Changes Release Notes.*.

SAP Concur Support Case Status

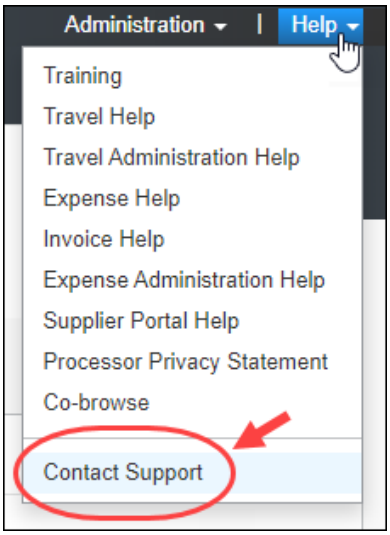
This release might resolve previously submitted support cases. You can check the status of a support case to confirm whether the case issue has been resolved.

Check Support Case Status

The steps in this procedure provide instructions for checking whether a case is resolved.

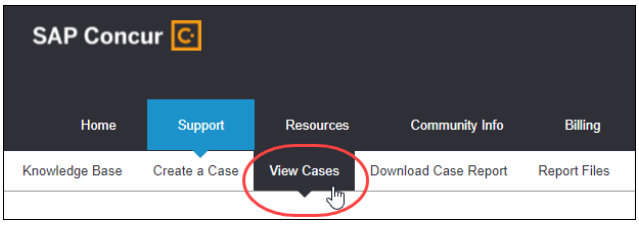
To check the status of a submitted case:

1. Log on to https://concursolutions.com/portal.asp.
2. Click **Help > Contact Support**.

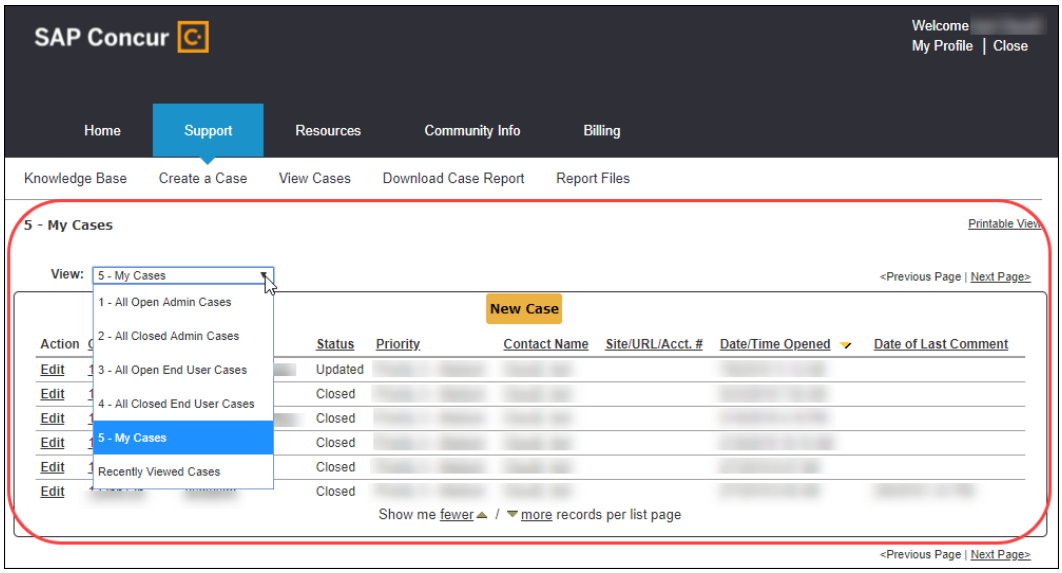


NOTE: If you do not have the option to contact SAP Concur support in the **Help** menu, then your company has chosen to support the SAP Concur service internally. Please contact your internal support desk for assistance.

3. Click **Support > View Cases**.



In the table, view the desired type of cases based on the **View** list selection. Search results are limited to each company's own cases.

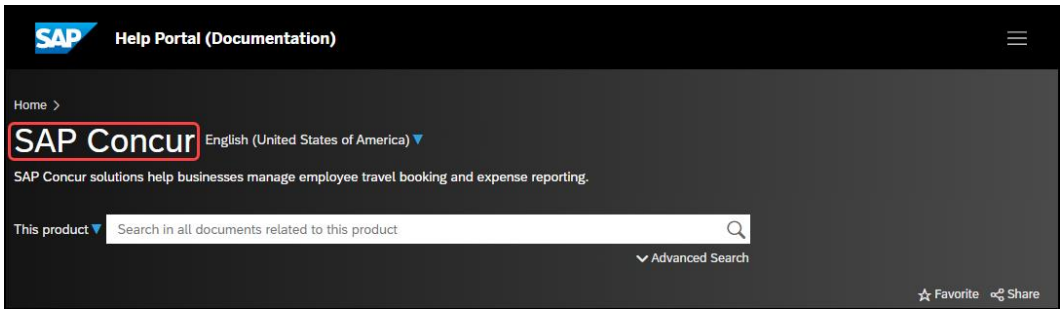


Additional Release Notes and Other Technical Documentation

Online Help

You can access release notes, setup guides, user guides, admin summaries, supported configurations, and other resources via the in-product Help menu or on the SAP Help Portal.

To access the full set of documentation for your product, use the links in the SAP Concur **Help** menu, or visit the SAP Concur solutions page.



SAP Concur Support Portal – Selected Users

Access release notes, webinars, and other technical documentation on the SAP Concur support portal.

If you have the required permissions, **Contact Support** is available on the SAP Concur **Help** menu and in the SAP Concur page footer.

Click **Contact Support** to access the SAP Concur support portal, then click **Resources**.

- Click **Release/Tech Info** for release notes, technical documents, etc.
- Click **Webinars** for recorded and live webinars.

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