

# **– Concur Travel \* Client Fact Sheet – Auto Cancel February 13, 2023**

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## **Overview**

How auto-cancel works depends on several factors and settings (all are discussed on the following pages):

- If the trip is on hold and "times out"
- If the trip is awaiting approval and "times out"
- If the trip is rejected by the approver
- If the trip involves certain direct connect vendors
- If the trip was incomplete – that is, either intentionally (abandoned) or unintentionally (orphaned) unfinished

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## **Professional Travel vs Standard Travel**

The auto cancel options are:

- Allow Auto Cancel of trips on hold
- Allow Auto Cancel of trips that require approval
- Allow Auto Cancel of air/rail trips that are rejected
- Allow Immediate Cancel of non-air/rail trips that are rejected

They work the same way for Professional Travel as they do for Standard Travel, as described on the following pages.

For configuration:

- **Professional Travel:** The auto-cancel settings are in the **Wizard Options** section of the travel configuration page (available to TMCs and Concur Travel).

<input checked="" type="checkbox"/> No Personal Trips.	<input type="checkbox"/> Allow Multiple Violation Reason Codes
<input type="checkbox"/> Allow users to put trips on hold for <input type="text" value="No limit"/> days	<input checked="" type="checkbox"/> Allow Auto Cancel of trips on hold ?
<input type="checkbox"/> Allow Auto Cancel of air/rail trips that are rejected ?	<input type="checkbox"/> Allow Auto Cancel of trips that require approval ?
<input type="checkbox"/> Allow Immediate Cancel of non-air/rail trips that are rejected ?	Auto-approve trips on passive hold after a maximum of <input type="text" value="1"/> days.

- **Standard Travel:** All of the options are ON by default and are not available for change.

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## Timing

Note the following about timing:

- The *standard* timeframe is "approximately 6 hours after a defined point in time" for example, after the LDT (Last Date to Ticket), after approver rejection, or after the trip is abandoned by the user.
- In certain cases, there is another factor considered: within 24 hours of departure.

This applies only to specific auto-cancel settings and only if 24 hours prior to departure falls earlier than one of the timeframes previously noted.

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**NOTE:** If the user associated with the trip is assigned the *z\_Demo /Training /Practice* permission or the *z Auto-Cancel User* permission, then the 6-hour timeframe is shortened to 4 hours. Refer to the *Concur Travel: Company Administration User Guide* for a full description of these two permissions.

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- *Immediately*, on the other hand, means "within 20 minutes." The Concur Travel-internal job that completes the cancellation process runs about every 20 minutes so any "immediate" cancellation will be part of the next cancellation job.

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## How It Works

### *On Hold*

Topic	Description / Action
Situation	The user places the trip on hold and the LDT (Last Date to Ticket) passes.
Setting	Allow Auto Cancel of trips on hold
How it works	<ul style="list-style-type: none"> <li>• If enabled, Concur Travel cancels the trip about 6 hours after the LDT has passed.</li> <li>• If not enabled, Concur Travel does not cancel the trip, but the GDS likely has, since the LDT has passed. Because of this, the user will not be able to finish the trip in Concur Travel after the LDT has passed.</li> </ul>
Notes/Best Practice	<ul style="list-style-type: none"> <li>• Concur Travel recommends enabling this setting if the <b>Allow users to put trips on hold</b> option is active. This ensures an optimal user experience; bookings are not available for the user to complete at a point when the GDS no longer allows it.</li> <li>• Instant purchase/guaranteed ticketing carriers cannot be placed on hold, so they are not affected by this setting.</li> </ul>

## ***Awaiting Approval***

<b>Topic</b>	<b>Description / Action</b>
Situation	The trip is awaiting approval and the LDT (Last Date to Ticket) passes.
Setting	Allow Auto Cancel of trips that require approval
How it works	<ul style="list-style-type: none"><li>• If enabled, Concur Travel cancels the trip about 6 hours after the LDT has passed.</li><li>• If not enabled, Concur Travel does not cancel the trip, but the GDS likely has, since the LDT has passed. Because of this, the user will not be able to finish the trip in Concur Travel after the LDT has passed.</li></ul>
Notes/Best Practice	<ul style="list-style-type: none"><li>• Concur Travel recommends that you select this option if an approval process is in place.</li><li>• Instant purchase/guaranteed ticketing carriers cannot be placed on hold, so they are not affected by this setting.</li><li>• Trips booked for same-day travel and approval is required will be auto-canceled within 20 minutes of booking.</li></ul>

## ***Rejected by Approver – Air or Rail***

<b>Topic</b>	<b>Description / Action</b>
Situation	A trip with air or rail is rejected by the approver.
Setting	Allow Auto Cancel of air/rail trips that are rejected
How it works	<ul style="list-style-type: none"><li>• If enabled, Concur Travel cancels the entire trip based on the ticketing deadline or within 24 hours of travel.</li><li>• If not enabled, Concur Travel does not cancel the trip at all – it remains live with the potential for airline cancellations, hotel no-show fees, etc. The TMC would need to monitor the Approval Hold queue and manually cancel as needed.</li></ul>
Notes/Best Practice	<ul style="list-style-type: none"><li>• Concur Travel recommends that you select this option if an approval process is in place.</li><li>• Instant purchase/guaranteed ticketing carriers cannot be placed on hold, so they are not affected by this setting.</li><li>• This feature does apply to offline trips.</li></ul>

## ***Rejected by Approver – Car and/or Hotel Only***

<b>Topic</b>	<b>Description / Action</b>
Situation	A trip with car and/or hotel – without air or rail – is rejected by the approver.
Setting	Allow Immediate Cancel of non-air/rail trips that are rejected
How it works	<ul style="list-style-type: none"><li>• If enabled, Concur Travel cancels the trip immediately (within 20 minutes of the reject action).</li><li>• If not enabled, Concur Travel does not cancel the trip at all – it remains live with the potential for no-show fees. The TMC would need to monitor the Approval Hold queue and manually cancel as needed.</li></ul>

Topic	Description / Action
Notes/Best Practice	<ul style="list-style-type: none"> <li>Concur Travel recommends that you select this option if an approval process is in place. This will assist travelers with avoiding hotel no-show fees.</li> <li>Instant purchase/guaranteed ticketing carriers cannot be placed on hold, so they are not affected by this setting.</li> <li>The approval email Concur Travel sends to the approver indicates that the rejection also means cancellation. If the trip is rejected, Concur Travel sends an email to the user indicating that the trip was rejected by the approver and cancelled by Concur Travel.</li> <li>This feature does apply to offline trips.</li> </ul>

### ***Incomplete – Not Direct Connect***

Topic	Description / Action
Situation	<ul style="list-style-type: none"> <li><b>User-abandoned trip:</b> The user (or the user's machine) ended the session without completing the trip. For example, the user closed Concur Travel or there was a power outage before completion.</li> <li><b>Orphaned trip:</b> Concur Travel initiates the closure and, for whatever reason, the user cannot complete the trip in Concur Travel.</li> </ul>
Setting	None (system-wide behavior)
How it works	Regardless of how it occurred, if the user does not access Travel within approximately 6 hours of the event and complete the trip, Concur Travel will auto-cancel it.

### ***Incomplete – Direct Connect***

Topic	Description / Action
Situation	<ul style="list-style-type: none"> <li><b>User-abandoned trip:</b> The user (or the user's machine) ended the session without completing the trip. For example, the user closed Concur Travel or there was a power outage before completion.</li> <li><b>Orphaned trip:</b> Concur Travel initiates the closure and, for whatever reason, the user cannot complete the trip in Concur Travel.</li> </ul> <p>Certain direct connect vendors charge a cancellation fee, even within the first 24 hours of booking. Since Concur Travel's auto-cancel process is automated, users are not advised of these fees and, therefore, cannot accept the charges.</p>
Setting	None (system-wide behavior)

Topic	Description / Action
<p>How it works – <b>User-Abandoned trips</b></p>	<ul style="list-style-type: none"> <li>For Deutsche Bahn/BIBE: <ul style="list-style-type: none"> <li>Bookings cannot be auto-cancelled in the BIBE system; Concur Travel does not auto-cancel the reservation.</li> <li>Concur Travel sends the user an email stating that the booking is incomplete but not cancelled. The user is encouraged to complete or cancel the booking.</li> <li>Concur Travel will continue to send a reminder email daily until the booking is completed or canceled.</li> </ul> </li> <li>For Southwest, Amtrak, SNCF, and hotel direct connect vendors: <p>Concur Travel auto-cancels user-abandoned direct connect reservations. Concur Travel still auto-cancels with these direct connects because they allow us to cancel within the first 24 hours without penalty or because the TMC actually issues the ticket.</p> </li> <li>For all other direct connect vendors: <p>Concur Travel <b>does not</b> auto-cancel user-abandoned direct connect reservations with the source or in the GDS PNR. These bookings are treated as instant purchase, in that Concur Travel considers them ticketed as soon as they are reserved with the source.</p> <p>If a user does not complete the trip but gets as far as selecting the form of payment to be used for the reservation, or sees the Travel Details page in the case of Travelfusion), Concur Travel:</p> <ul style="list-style-type: none"> <li>Does <b>not</b> auto-cancel the reservation</li> <li>Does <b>not</b> send the unfinished/auto-cancel email notification to the traveler</li> <li>Sends the unfinished booking through PNR finishing to capture policy and custom field placeholders in the GDS PNR</li> <li>Queues the GDS PNR to the TMC ticketing queue to fulfill the reservation</li> </ul> <p><b>Exception:</b> trips containing a Cleartrip reservation will be queued to the refund request queue to indicate to the TMC that manual intervention is needed to reconcile charges on the deposit account with invoices to the customer.</p> <p><b>Note:</b> For this process to work correctly, it is required for TMCs servicing customers in India to set up a refund request queue.</p> <ul style="list-style-type: none"> <li>Sends an auto-finish email notification to the booker and to the Urgent Contact Email Address provided in the Agency Configuration. This notification will be sent when the trip would normally be auto-canceled (approximately 6 hours after the trip was abandoned).</li> </ul> </li> </ul>
<p>How it works – <b>Orphaned trips</b></p>	<ul style="list-style-type: none"> <li>For Travelfusion, SNCF, Evolvi, Deutsche Bahn/BIBE – if a booking is orphaned due to a system issue: <ul style="list-style-type: none"> <li>If the user does not access Travel within approximately 6 hours (of the orphan event) to complete the trip, Concur Travel will auto-cancel it. This process only initiates for bookings where the user <b>does not</b> get to the <b>Travel Details</b> page.</li> </ul> </li> </ul>

Topic	Description / Action
	<ul style="list-style-type: none"> <li>♦ If the user <b>does</b> get to the <b>Travel Details</b> page but an issue prevents him/her from completing the booking, the system will treat the booking as though it is a user-abandoned booking (see previous section).</li> <li>• For all other direct connect vendors – if a booking is orphaned due to a system issue: <ul style="list-style-type: none"> <li>♦ For bookings where the user <b>does not</b> get to <b>Travel Details</b> page, it is assumed the vendor has not finalized the booking either. Concur Travel treats this scenario as though the booking never occurred – the user will need to reinitiate the booking process.</li> <li>♦ If the user <b>does</b> get to the <b>Travel Details</b> page but an issue prevents him/her from completing, the system will treat the booking as though it is a user-abandoned booking (see previous section).</li> </ul> </li> </ul>

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## Remark to Prevent Auto-Cancel

Auto-cancel is a necessary and beneficial feature. Although it is best practice to have a trip that originated in Concur Travel completed in Concur Travel, there are times when a trip has to be “claimed” by the TMC for completion. This usually occurs if there is an error during the booking process and air/rail space is limited for the trip. Concur Travel’s auto-cancel process supports agent-claimed trips.

The auto-cancel robot will look for the presence of a standard remark in the PNR. If this remark is found, it will ignore the record and will not cancel any segments.

The remark must look like this:

Apollo: @:5CB/AGENT CLAIMED (@=pillow)  
 Sabre: 5H-CB/AGENT CLAIMED  
 Worldspan: 5RM-CB/AGENT CLAIMED  
 Amadeus: RMCB/AGENT CLAIMED  
 Galileo: RI.CB/AGENT CLAIMED

Please note the following:

- Agents must queue these records to the reporting queue once they add the remark.
- Once Concur Travel has read this remark, auto-cancel ignores it, even if the remark is subsequently removed.
- Certain types of trips are time-sensitive.

## Revision History

Date	Notes / Comments / Changes
April 16, 2020	Updated <i>Incomplete – Direct Connect</i> section.
December 13, 2019	Removed references to Air Canada Direct Connect and added information to <i>How it works – User-Abandoned trips</i> under the <i>Incomplete – Direct Connect</i> section
February 2 2018	Clarification that hotel direct connect reservation left unfinished are canceled.
October 12 2016	Updated Worldspan remarks
October 22 2015	Removed the "20 minute" reference from the <i>Rejected by Approver – Air or Rail</i> section