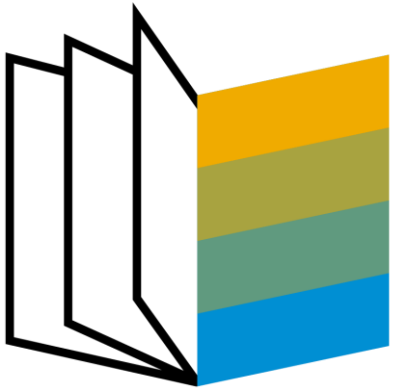
SAP Concur

App Center Partner Guidebook



PUBLIC

THE BEST RUN SAP

Introduction

Welcome to the SAP Concur App Center! We're grateful for your partnership and thank you sincerely for making this investment with us.

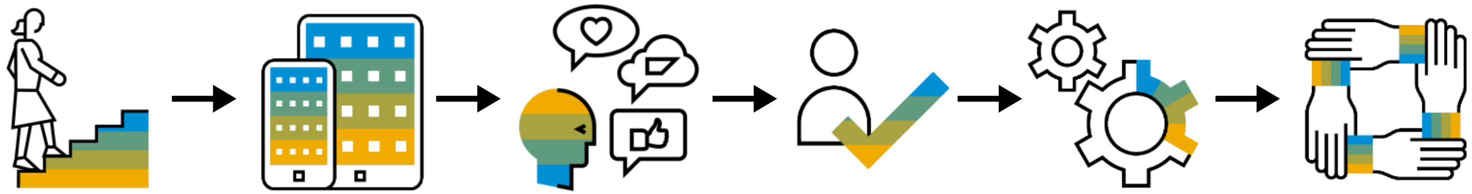
Over the last 8 years we've also been investing in building what we believe is one of the most partner-centric programs of its kind in the industry. Our teams will work hand-in-hand with you throughout your journey with us – your success is our success. When the relationship works well, we're collaborating to build innovative solutions that drive better business outcomes for our mutual customers and, in turn, increase brand value and awareness for both of our organizations.

That said, the SAP Concur App Center ecosystem includes over 250 solutions which can't all be center stage, so the work has only just begun. In 2019 we helped deliver over 11,000 leads to our partner community and we want you to share in those opportunities – but we need your help. Every deal you win, every customer you implement on our integrated solution, every positive interaction you have with our client-facing teams, and every success story you share is another proof point toward winning the time and attention of our customers, our field, and our marketing teams. The ultimate goal is that your solution becomes core to the value proposition of SAP Concur which, when it goes well, can become a tremendous marketing engine for you.

To get us started on the right path, we want to make sure we provide all the resources we can to help the partnership thrive and scale. This guide is meant to serve as a playbook your organization can reference regarding how to optimize the partnership and manage the day-to-day engagement needed to build our business together.

If you have any questions that are not addressed by this guidebook, please reach out to the Alliances team at concur_AppCenterAlliance@sap.com.

Jessica Pankov
Sr. Director
SAP Concur App Center &
SolEx Partnerships



Partner Onboarding → **Technical Enablement** → **Marketing** → **Sales** → **Operations** → **Alliances**

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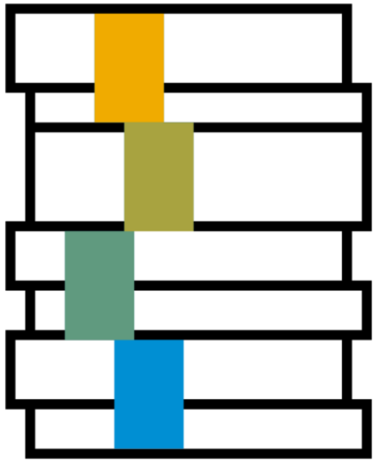
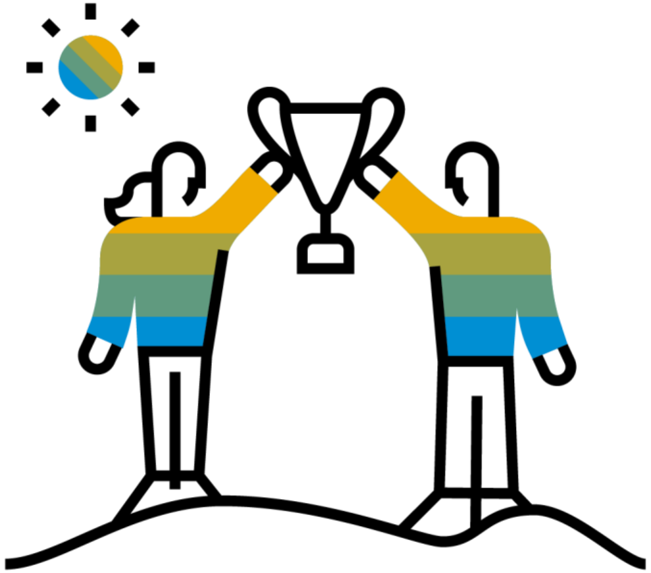


Quick Reference

Best Practices for App Center Success



1. Understand where your integration is most successful and effective in the Customer Lifecycle

2. Use the Marketing Toolkit and work with concur_AppCenterMarketing@sap.com to create the recommended Marketing content pieces and update them and your App Center listing annually
   - Newer content is more visible and pushes awareness within SAP Concur

3. Utilize Partner Place and the Go-to-Market resources

4. Assign internal resources to manage the LOA and DNF process
   - Streamlining your deal acquisition process and reporting your deals increases your reputation within the App Center

5. Prioritize prompt Lead follow-up with our sales reps and keep them in the loop with the deal process

6. Nurture relationships with SAP Concur sales reps and directors
   - Ask if, beyond leads you've received, there are any other clients they manage that would benefit from your offering

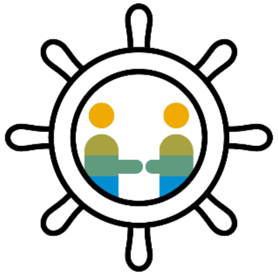
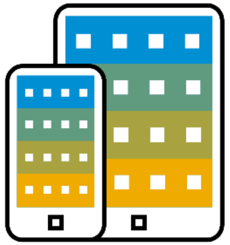
7. Sponsor Events

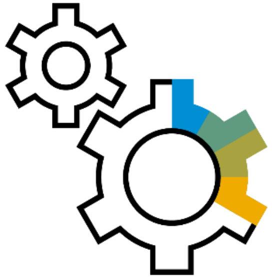
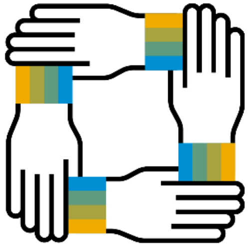
8. Engage regularly with the Alliance team (concur_AppCenterAlliance@sap.com) regarding the success and pipeline for your integration(s)

9. Be well-versed in the Support Process to ensure a smooth customer experience with your integration

10. Subscribe your team to the monthly App Center Partner Insights Newsletter for important updates like business or technology changes, upcoming events, and marketing opportunities by emailing concur_AppCenterMarketing@sap.com

Partner Tasks by App Center Team

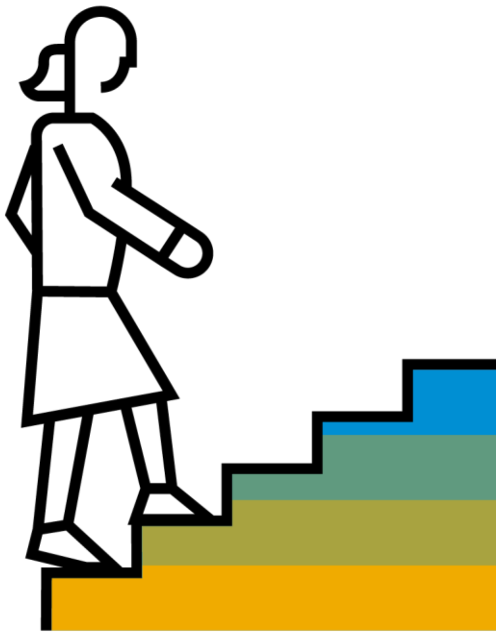




Business Development	Technical Enablement	Marketing	Sales	Operations	Alliances
▪ Handoff to onboarding ▪ Add new App Center integration(s)	▪ Certify partner integrations ▪ Make integration modifications ▪ Get support for integration and customer technical issues ▪ Access the partner Sandbox ▪ Attend the App Center Processes Meeting ▪ Testing a customer's integration	▪ Submit and revise partner integration marketing content ▪ Modify partner listings ▪ Sponsor events ▪ Customer Testimonials ▪ Subscribe to the Partner Insights Newsletter	▪ Connect with sales teams about partner integration(s) ▪ Get introduced to a client's account team	▪ Get access to Partner Place SharePoint site ▪ New Deal Process ▪ Letter of Authorization (LOA) ▪ ERP Connector Requirements Form ▪ Deal Notification Form (DNF) ▪ Cancellations	▪ Ask general partnership questions ▪ Coordinate business reviews ▪ Get reporting ▪ Review contract terms ▪ Expand integration functionality ▪ Request LOA modifications
Contact Alliances team	Contact Alliances team	Contact Marketing team	Contact Alliances team	Contact Operations team Contact App Center Billing	Contact Alliances team

Frequently Asked Partner Questions

- How do I engage with sales teams?
- How do I ensure that people in my organization are getting the right updates and information?
- How do I subscribe to the App Center Partner Insights Newsletter?
- What happens after a partner receives a lead?
- I know of a lead that was submitted but I have not received it. How can I be sure the App Center is sending leads to the correct address?
- How do I submit my first deal?
- How do I connect with SAP Concur implementation?
- I have a client-specific question. Where do I go?
- I have an unhappy client. Who do I go to?
- Who should I reach out to regarding reports related to my integration?
- Who do I go to for Billing information?
- I've submitted a technical issue. How can it be escalated?
- When should I, the partner, log a support case instead of the customer?
- My technical issue was submitted to R&D, who do I reach out to?
- How can I update my App Center listing?
- What should I do if I want to make changes to our app/landing page?
- How do I create a new App Center Integration?

Partner Onboarding



SAP Concur App Center Overview

The App Center is a collection of ISV partner integrations that help companies and their travelers drive smarter spend, easier travel, and effortless expensing within their instance of SAP Concur, a SaaS that provides travel and expense management services.

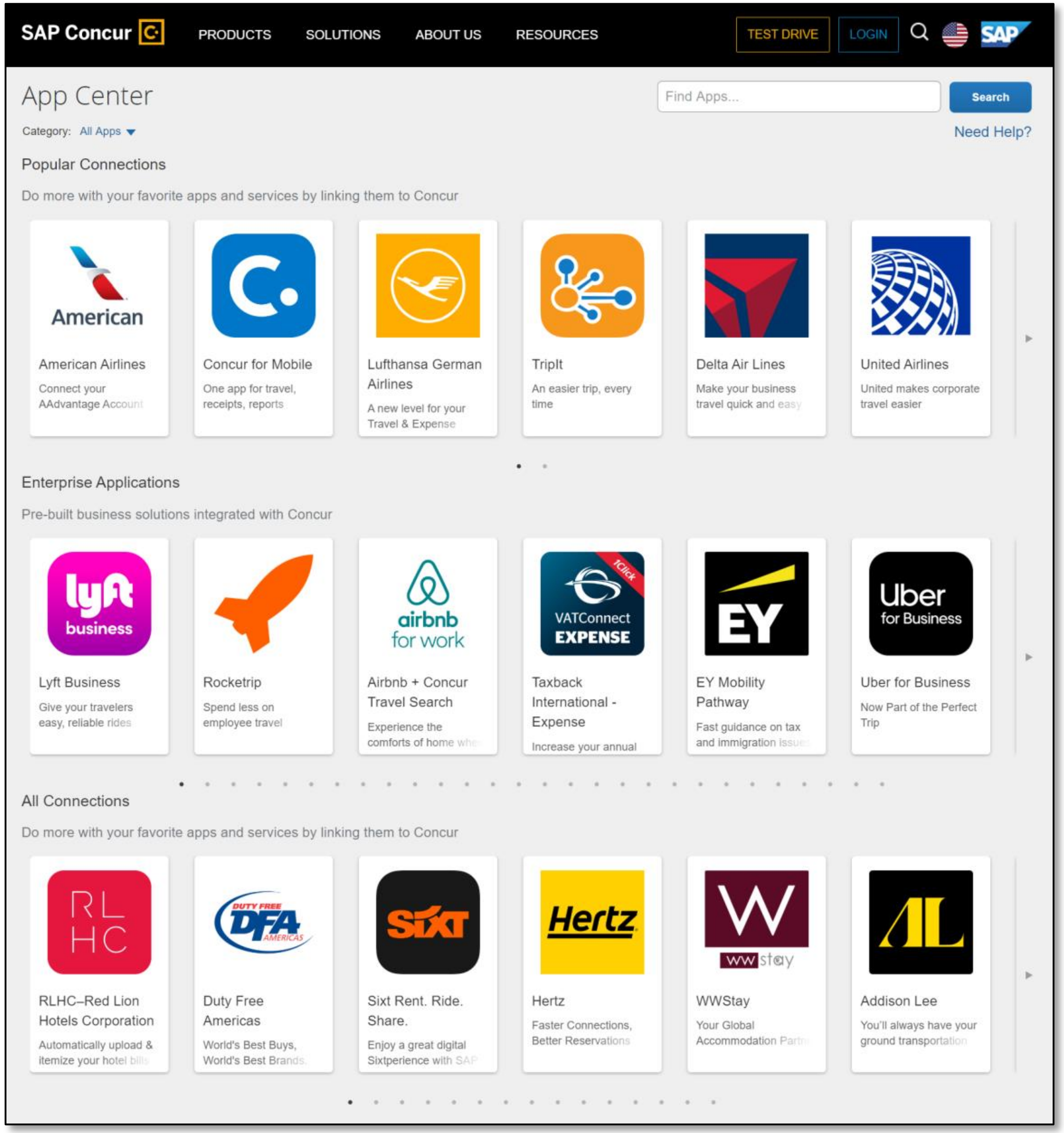
The App Center can be accessed at concur.com/appcenter. Apps are sorted by:

- **User Connections** - Apps connected by individual users

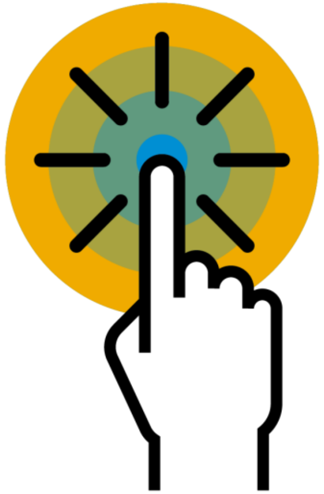
  Connections are pre-filtered for users based on their location and whether they have access to Concur Travel, Concur TripLink, or Concur Expense or Invoice

- **Enterprise Applications** - Apps authorized by a client administrator that access/push data at a company level

  Enterprise apps can be enabled directly from the partners' App Center listing pages



Onboarding Items



When being onboarded, our Business Development team informs the partner about:

App Certification

Partner Technical teams must complete the App Certification Readiness and Scheduling form.

For more information about Certification and to view Prezis regarding Enterprise and eReceipts apps, visit this site.

Partner Place SharePoint Site

The partner team receives a link to their Partner Place SharePoint Site. Once a partner receives access, they should:

- Fill out missing partner contact information
- Request access for team members without access by submitting the Partner Place Access Request Form. Turnaround: 2 business days

If a partner is having trouble with accessing the site, they can refer to these instructions.

Marketing Next Steps

The App Center Marketing team (concur_AppCenterMarketing@sap.com) will reach out to the partner team to collaborate on the partner's App Center listing(s) and related marketing content.

Visit the Go-to-Market page with a special focus on the "Marketing Your App" section.

App Center Orientation

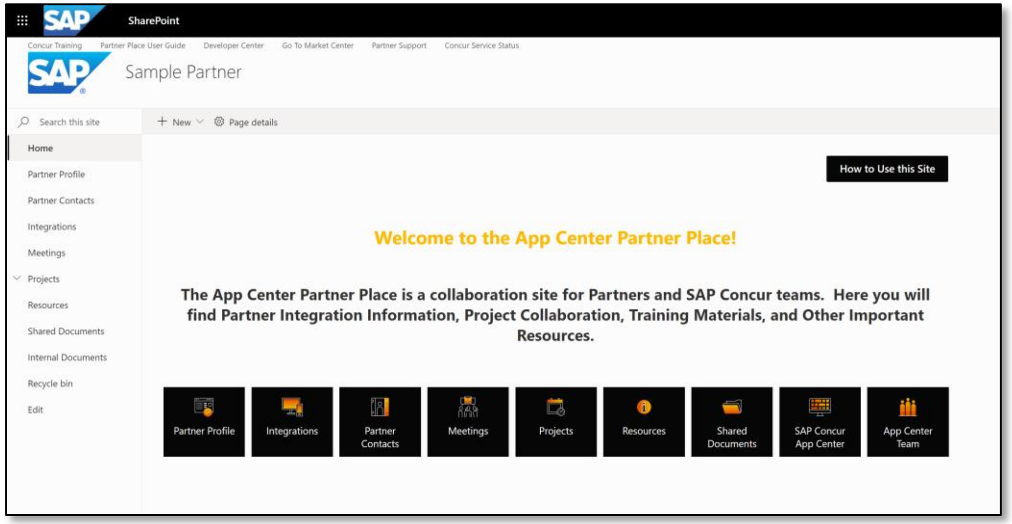
The App Center will send an invitation to the App Center Orientation meeting (Zoom meeting link here). Attendance is required before your app can be certified to go live in the App Center. The meeting is held monthly, and you can attend any time after your initial meeting to refresh your knowledge. The slides for the presentation can be viewed here.

Your alliance, marketing, and finance contacts should attend this meeting. Be sure you have provided this contact info so they can receive invitations to the meeting.

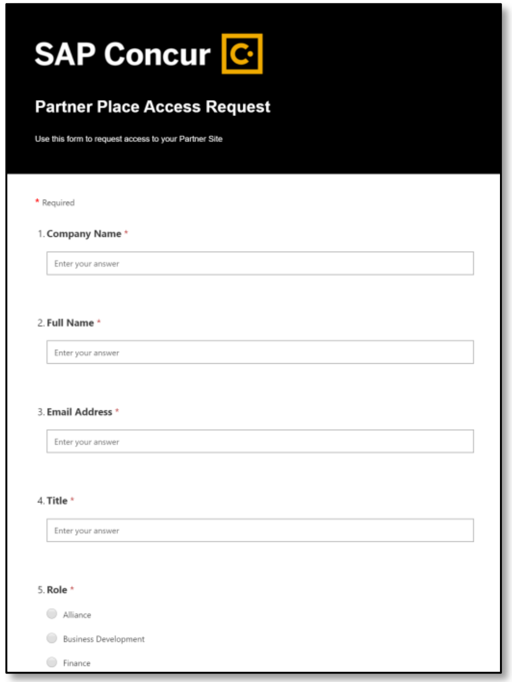
Partner Place

Each App Center partner is given a Partner Place SharePoint site where they and the SAP Concur App Center team can:

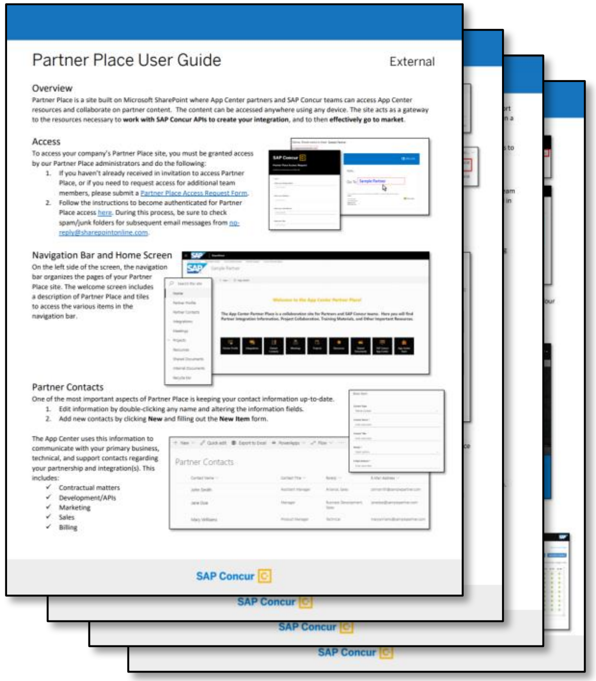
- Securely organize **partner information**
- Update the list of **contacts** that is to receive App Center updates
- Store, exchange, and edit **documents** with the App Center team
- Track **project checklists** (Go-Live Project Plan)
- Access Technical and Go-to-Market **resources** (Marketing Toolkit, DNF, etc.)



If a partner contact has not already received access, they should submit the Partner Place Access Request Form.



For more information, refer to the Partner Place User Guide.

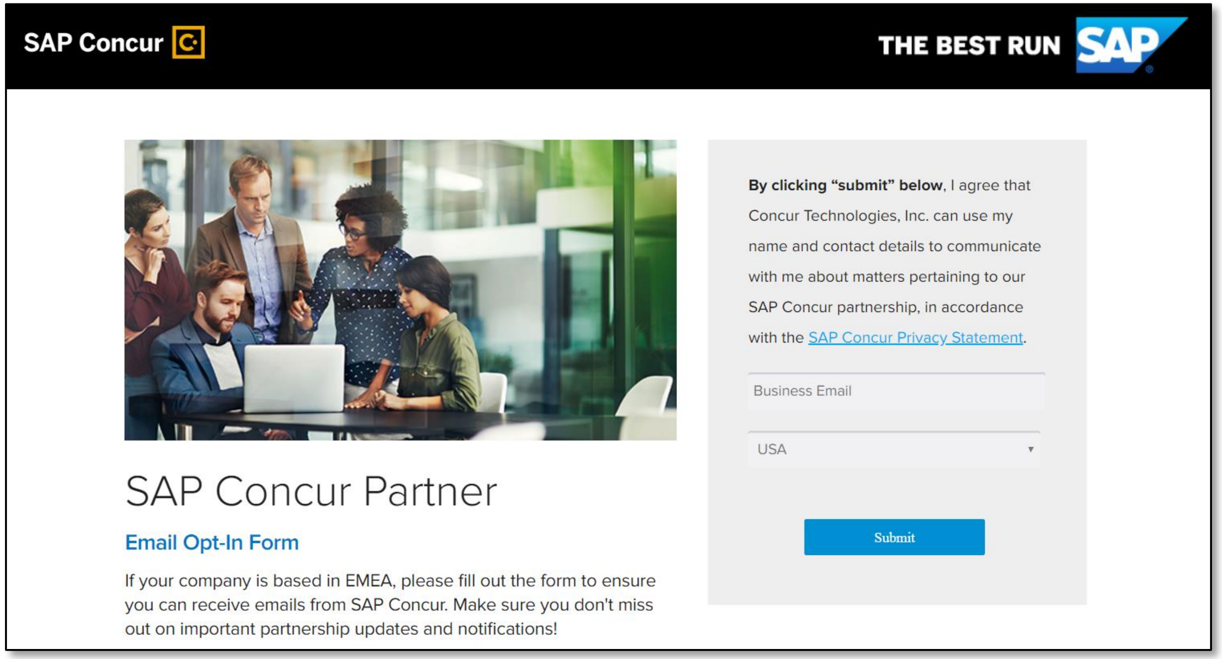


EMEA Partners: Opt In to App Center Updates

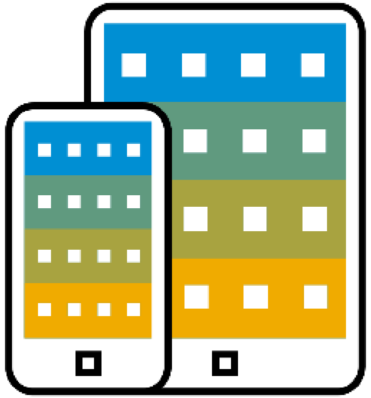
SAP Concur must comply with GDPR to send marketing communications to partners, including:

- Newsletters
- Event invitations
- Important maintenance or outage notifications

If you work for an App Center partner headquartered in EMEA and will need to receive App Center updates, please opt in here.



Technical Enablement



App Certification

All details about App Certification can be found on the SAP Concur Developer Portal.

To certify an app, the partner's technical team must complete the App Certification Readiness and Scheduling form.

Once completed, a technical project manager will be assigned to:

1. Guide the partner through the scoping & design of the integration
2. Answer integration questions about APIs & core products
3. Provide guidance on best practices, including recommended user interface and authentication processes
4. Host end-to-end walkthroughs to complete the certification

The above will be documented via the Project Plan and Checklist on the partner's SharePoint Partner Place site.

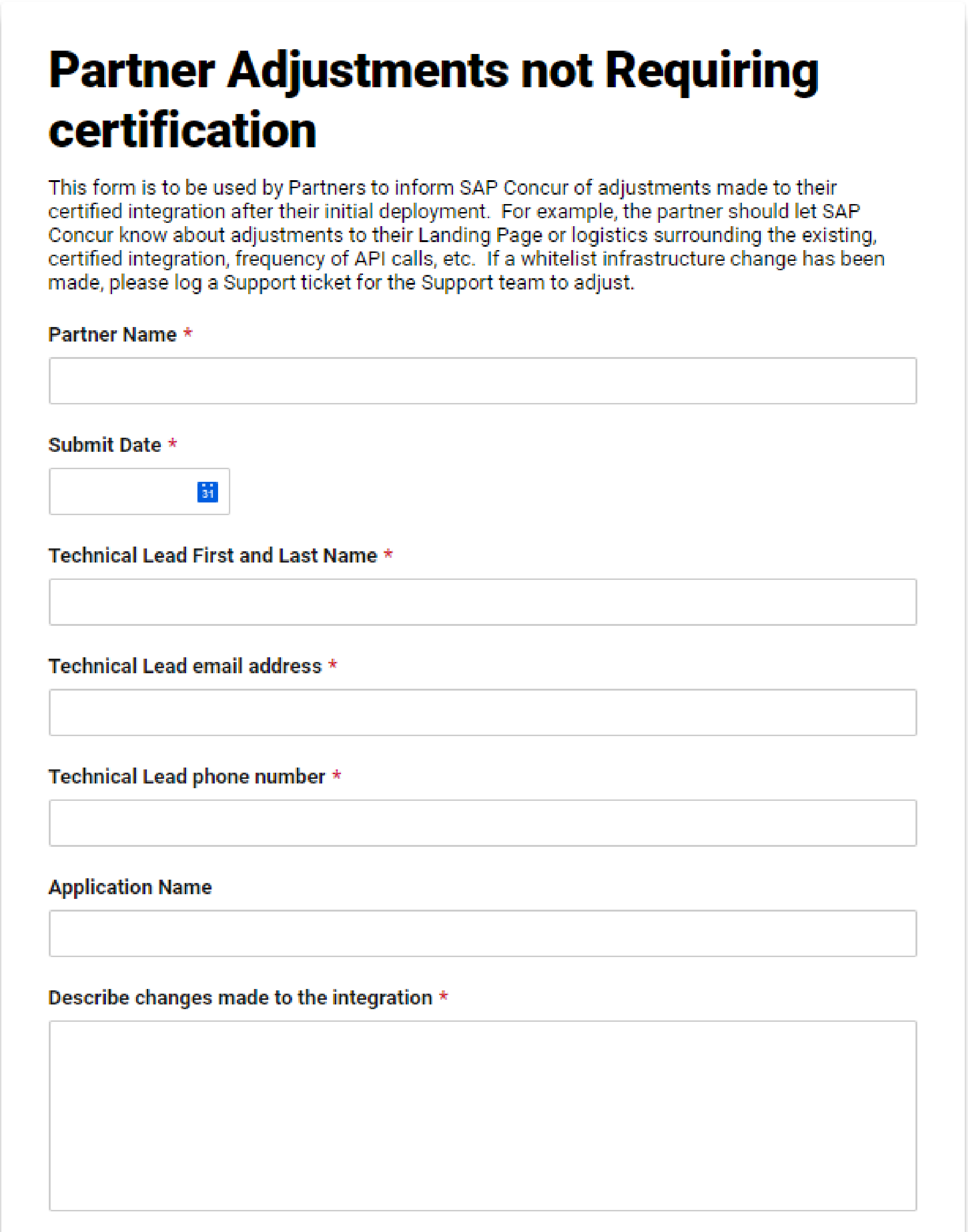
The partner is expected to maintain continuity after the certification project begins. Any reengagement after a delay may require the partner to wait for available certification resources.

Making changes to your existing App Center integration

All partner integrations are subject to change and evolution. It’s important that partners make sure they inform the App Center when these changes are made so as to avoid technical issues and negative feedback from customers. Common changes to partner integrations include modification of:

- Data fields in the APIs
  - Using fields beyond those designated as viable by Technical Enablement during certification may break your integration
- The app’s landing page
- Infrastructure changes that require whitelisting on SAP Concur’s side

If a partner makes changes to their integration or app landing page, they should submit an integration change intake form.



Partner Adjustments not Requiring certification

This form is to be used by Partners to inform SAP Concur of adjustments made to their certified integration after their initial deployment. For example, the partner should let SAP Concur know about adjustments to their Landing Page or logistics surrounding the existing, certified integration, frequency of API calls, etc. If a whitelist infrastructure change has been made, please log a Support ticket for the Support team to adjust.

Partner Name *

Submit Date *

Technical Lead First and Last Name *

Technical Lead email address *

Technical Lead phone number *

Application Name

Describe changes made to the integration *

Testing Partner Integrations with Customers

Partner applications do not necessarily need to be tested in a customer's testing environment because many integrations **obtain data** from the customer's site and **process that data** on the partner's side (i.e. the presence of the partner's application has no impact on the normal use of the Concur site by obtaining data). However, some Enterprise applications **send data** to the customer's Concur site. If the customer wants to ensure the accuracy of this data by testing an Enterprise application prior to production use, here are the options:

Test User

- This functionality completely separates the data between test and production while allowing the customer to be confident that their testing is being done within a production infrastructure

- Only available for Enhanced configurations (aka "Professional Edition")

Test Sites

- Only available for Enhanced configurations (aka "Professional Edition")

Deploying the app during implementation

- If the partner's application cannot be tested using the Test User functionality and the customer is **still in implementation**, then the customer can deploy the app in their site *during* implementation, which is a production site in a **testing state**. This state remains until it is moved to production.

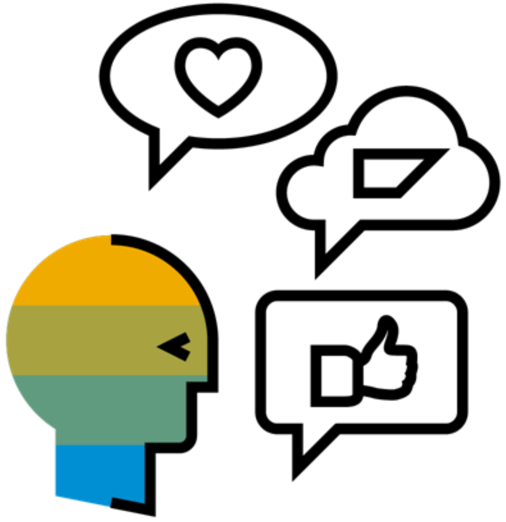
Reach out to concur_AppCenterAlliance@sap.com with any questions regarding test entities.

Creating a new App Center Connector

If a partner has a new connector they would like to add to the App Center, they should engage with the Alliances team (concur_AppCenterAlliance@sap.com) to discuss opportunity and revenue potential. They should NOT engage with the Certification PM that they worked with for their previous certification. If the Alliance team agrees to move forward, they will:

1. Coordinate with the Technical Enablement, Certification, and Legal teams to (if necessary):
   - Request new scopes
   - Coordinate contract modifications
2. Business Development will send an email that provides the partner with a link to request a Certification call.
   - Technical Enablement will review the submitted form and assign it to a Certification PM on the App Center team.
   - A Certification PM will reach out to the partner.

Marketing



App Center Partner Marketing Toolkit

The most effective way to promote a partner integration is to make concise, current, and compelling marketing content available to SAP Concur sales teams, customers, and prospects.

The **Partner Marketing Toolkit** is your go-to resource for essential guidelines and templates for marketing your app. The toolkit covers:

- Logo & Brand Guidelines
- App Center Listing Process
- Best Practices & Recommendations for Sales & Marketing Content
- Sponsorship, Events, & Webinar Guides
- PR & Social Media Guidelines
- Search Guidelines

Visit the App Center Marketing Toolkit

Or, find it on the Go to Market page or in the Resources in Partner Place.

Key Marketing Resources

Partner Go to Market Resources Page

The Go to Market page, accessible from the Resources tab of your Partner Place site or via direct link, is the home for documents and links to help partners with:

- App Certification
- Marketing Your App
- Deploying Your App for Customers

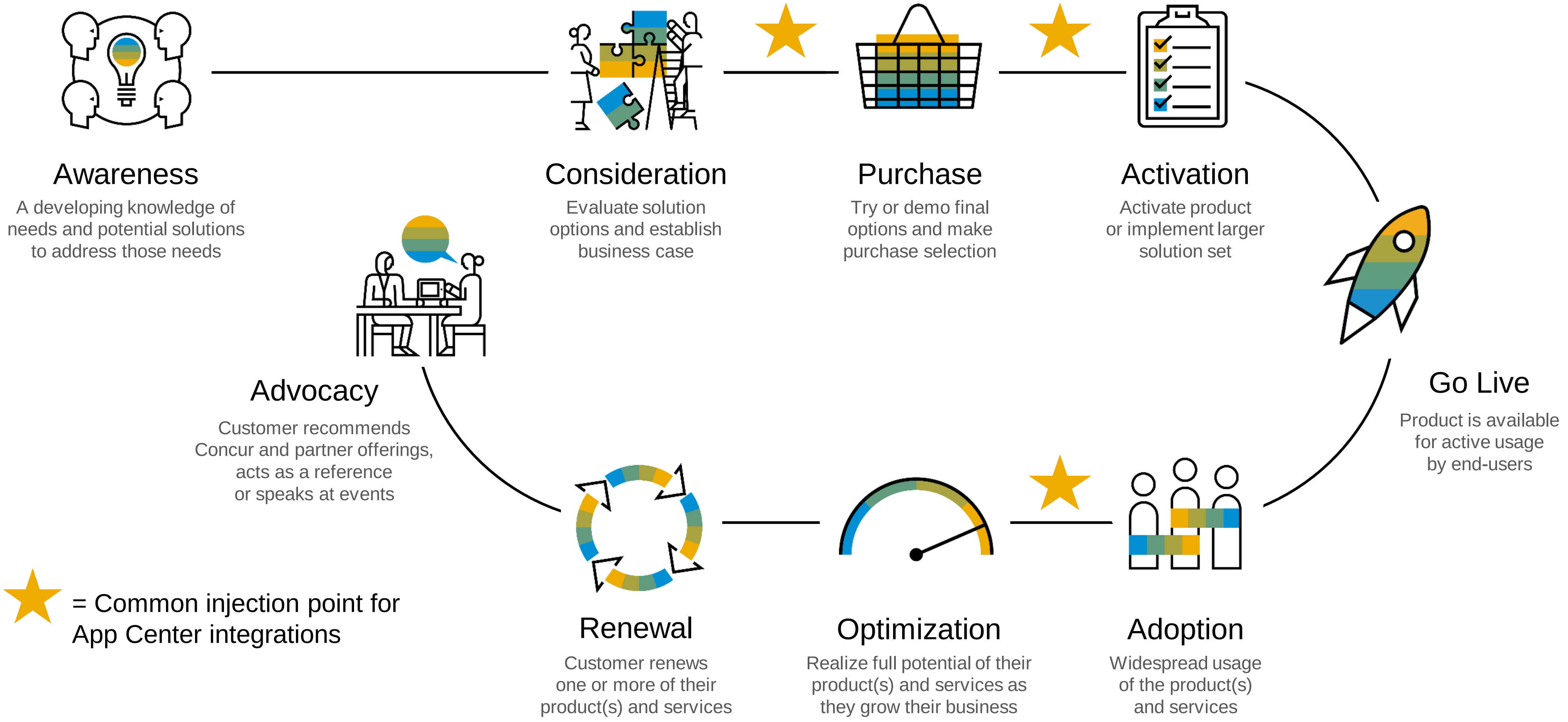
Monthly Meetings

- Marketing Office Hours
  – First Tuesday of every month at 8:30am PST
  – Open forum for marketing questions
- App Center Orientation
  – Second Wednesday of every month at 9:00am PST
  – Learn about the business processes and requirements for App Center partners

Email: concur_AppCenterMarketing@sap.com

Sales

SAP Concur Customer Lifecycle



SAP Concur App Center Integration Customer Phases

Sales

Guides clients to make decisions on what is best for them regarding SAP Concur products

Key Role

Regional Sales Executive (RSE)
Net new customers

Customer Sales Executive (CSE)
Existing Customers

Solution Consulting

Assists Sales by addressing technical, security, feature functionality, integration, and workflow questions

Key Role

Solutions Consultant (SC)

Implementation

Configures a client's SAP Concur instance (IPM) or guides the implementation project for new App Center integrations (Activation Coach)

Key Role

Implementation Project Manager (IPM)
Net new customers

Activation Coach
Existing customers

SMB Customer Success

Accompanies client with onboarding and Go-Live to ensure the utility of their SAP Concur experience

Key Role

Customer Success Manager (CSM)

ENT Client Development

Monitors customer experience in order to suggest appropriate optimizations and best practices

Key Role

Customer Engagement Executive (CEE)

Promote retention, renewal, and ongoing optimization

Support

The client moves to Support once they have been implemented successfully and are Live. They can request technical support via the Support Portal for any Concur product-related issues

Key Resource

Support Portal

Note: APAC and EMEA partners should engage with their respective regional and local SAP Concur Business Development teams

4 Pillars of SMB Focus

Spurring Sustainable Growth
Overcome the complexity that accompanies growth and stay on a prosperous path

Controlling Spend and Maximizing Profitability
Gain the power to cut costs companywide and ensure that revenue continues to rise

Empowering Your Enterprise with Data
Achieve greater financial success by making better data-driven decisions

Increasing Efficiency and Optimizing Performance
Automate your processes to save time, lower costs, and improve employee productivity

SAP Concur supports over 25,000 small and midsize businesses in North America.

4 Pillars of Enterprise Focus

Conversation-ready data, metrics, and content tailored to customer’s business outcomes

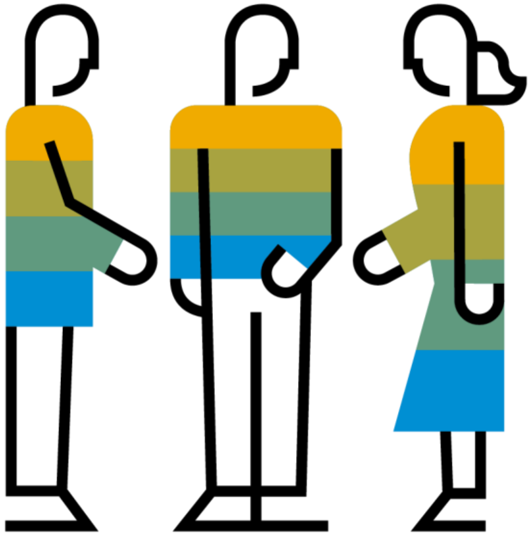
Controls & Compliance	Spend Governance	Employee Experience	Expansion & Optimization
General Definitions across Markets, Segments & Industries			
Internal Guidelines	Spend Channels	Employee Engagement	Regional Expertise
Regulatory Requirements	Review Processes	Retention	Leveraging Data
Fraud Risk	Who, What, Where Spending	Productivity	Industry Focus
Policy Guidelines	Spend Analysis	Job Satisfaction	M&A
Employee Safety		Safety & Security	

Industry Focus tailoring coming soon

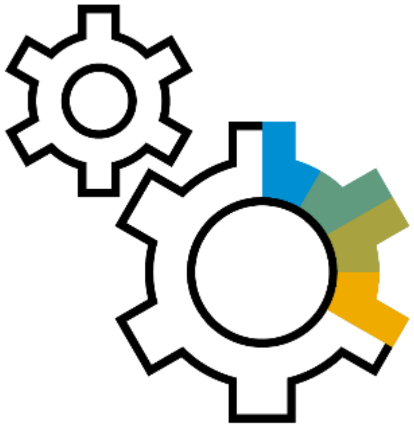
How to Engage with SAP Concur Sales Teams

Developing strong relationships with our Sales reps and directors will promote your integration's success in the App Center. Remember the following:

- Sales reps are busy, so make sure to use their time efficiently
- To help educate our sales teams on your integration(s), work with concur_AppCenterMarketing@sap.com to post your content in our field enablement tools: Highspot and Jam
- When creating content, make sure you follow SAP Concur partner brand guidelines
- Respond to leads in a timely manner and keep the rep informed on the deal status
- Ask if there are any other clients they manage that would benefit from your offering beyond leads you've received from them



Operations



Process for New App Center Partner Integration Deals

Partner receives a Lead

Partner closes deal

Partner has customer sign the Letter of Authorization (LOA)

Partner submits the ERP Connector Requirements Form

For ERP Connector partners only

Partner submits a Deal Notification Form (DNF)

App Center Leads

Partners can receive leads from both SAP Concur Sales Reps and SAP Concur clients/prospects.

Sales Reps

1. Manually submit leads through Salesforce.
2. The next slide (App Center Lead Submission Process) details instructions for SAP Concur distribution teams. You can include the slide on your presentation decks for meetings with SAP Concur sales teams.

Clients and Prospects

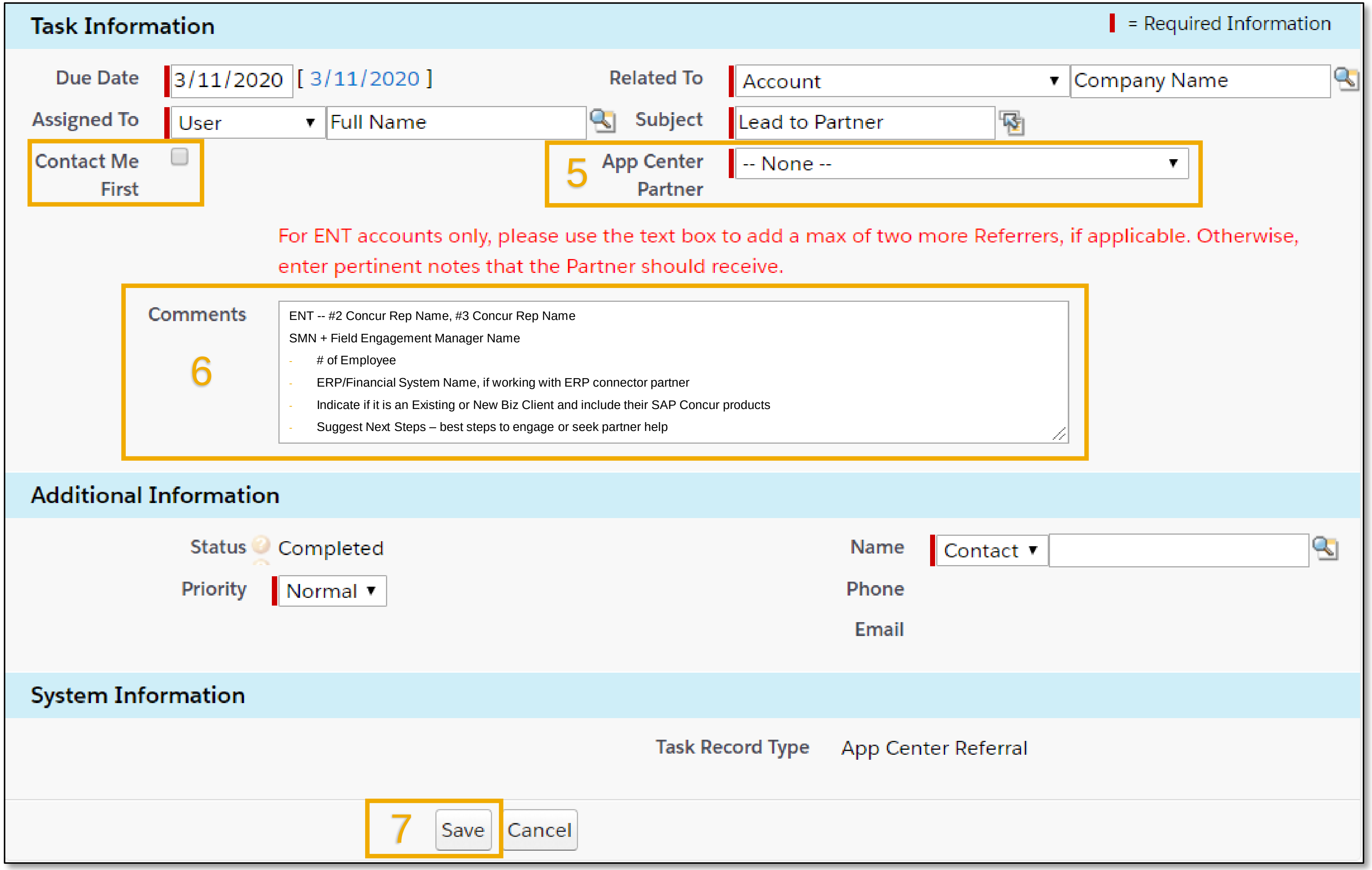
1. Submit leads by clicking the **Request More Information** button on the partner's App Center listing.

Review details of the lead submission process for SAP Concur distribution teams and clients on the Developer Portal.

App Center Lead Submission Process

For SAP Concur distribution team use

1. Agree with the customer that you can submit a lead on their behalf.
2. Log in to Salesforce and navigate to the customer's account.
3. If the customer contact is not yet listed in the account, add them in the Contacts section by clicking New Contact .
4. Click App Center Referral at the top of the Contact page.
5. Select the App Center partner to receive the lead.
6. Enter comments for the partner.
7. Click **Save**.
8. The lead will be sent to the partner. You will both receive a notification email.



App Center Lead Form

Leads are sent from Marketo, the marketing automation tool utilized by SAP Concur. The email details will include:

- From: appcenterreferral@sap.com
- Sender: Concur App Center Referral
- Subject: AppCenter Inquiry Submission
- Domain: et.concur.com, concur.com

If a partner knows SAP Concur leads for their connectors are being sent, but they are not receiving them, they should:

- Email concur_PartnerClientActivation@sap.com and inquire about what partner email address was marked as the recipient for Leads on the App Center Listing Form.
- Provide the App Center with the correct email address. Our team will update the address so Leads are sent there.

Concur App Center Notification:

The following Concur sales rep has submitted a prospect/lead for your app. Please plan to follow-up with this prospective customer at your earliest convenience.

If for some reason you do not accept this lead you need to email PartnerClientActivation@concur.com within 20 days otherwise acceptance is assumed.

Form Data:

Contact First Name: John
Contact Last Name: Smith
Contact Title: Controller/HR
Contact Email: john.smith@company.com
Contact Business Phone: (912) 345-6789

Account Name: Test Company
Account # of Employees: 100
Account Address: 113 Test Company Drive
Account City: Sacramento
Account State: CA
Account Zip/Postal: 95835
Account Country: USA

Submitted By First Name: William
Submitted By Last Name: Johnson
Submitted By Title: Regional Sales Executive, US Mid Market
Submitted By Email: william.johnson@concur.com
Submitted By Phone:

Contact Me First: Yes

Comments:
Customer has been fully integrated on Expense and Invoice. This customer is interested in integrating both with the Partner X connector.

from SAP Concur Sales Rep

forward | view in browser | view on mobile

Concur App Center Notification:

The following prospect/lead has submitted an inquiry via the App Center "Inquire" button. Please use the link below to "Accept" or "Reject" the lead and plan to follow-up with this prospective customer at your earliest convenience.

Click here to accept/reject the lead

Form Data:

App Partner: Partner X

Prospects First Name: John
Prospects Last Name: Smith
Prospects Email: john.smith@company.com
Prospects Phone: 9123456789
Prospects Company: Test Company
Prospects # Employees: 100
Prospects Title:
Prospects Address: 113 Test Company Drive, Sacramento CA 95835
Prospects City: Sacramento
Prospects State: CA
Prospects Zip/Postal: 95835
Prospects Country:
Concur Rep Name:
Concur Rep Email:
Concur Rep Phone:
Concur Rep Comments:

Privacy Policy on User-Submitted Form:
By submitting this form, I agree that SAP Concur may share my personal data with the above-named App Center partner as outlined in the SAP Concur Privacy Statement so the partner can respond to my inquiry in accordance with the partner's Privacy Statement using the contact information I provided above.

SERVICE STATUS | CONTACT SALES | REQUEST A QUOTE | SUPPORT

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We respect your privacy. Please review our Privacy Policy for more information.
Unsubscribe | Privacy Policy

From SAP Concur Client/Prospect

What happens after a partner receives a lead?

1. Both the partner and the sales rep who submitted the lead will receive the lead form email. **If a *customer* submits a lead, the partner will be responsible for reaching out to the customer.** A lead is considered accepted if the partner doesn't email concur_PartnerClientActivation@sap.com within 20 days. The partner has 20 days to reject the lead**.**
   - The partner should accept the lead as soon as possible. Sales reps will likely submit a lead to a competitor if the first choice partner is not responsive. The partner should only reject a lead if:
     1. It is a duplicate lead: someone already sent a lead for this customer, or the same rep submitted it twice by accident.
     2. The partner is already working with the customer and had them in the pipeline before the lead was received.

2. If the partner closes the deal, they send the client the Letter of Authorization (LOA). The client then sends it back to the partner. The partner can skip this step if they have developed the framework for OAuth 2.0. In this case, the client will sign an eLOA when they connect to your integration in the App Center.

3. When the partner receives the LOA, they submit a Deal Notification Form (DNF) with the LOA attached. Once complete one of two implementation types will begin:
   - **Concur-Led Deployment (rarer implementation type):** When the DNF is received, the App Center Operations team creates an internal project that is then assigned to an SAP Concur implementation consultant. This consultant works with the partner to complete the integration.
   - **Partner-Led / Self-Guided Deployment (more common):** No project is created. The partner carries out the deployment of their integration without the involvement of the SAP Concur Implementation team.

Letter of Authorization (LOA)

What is it?

- **<u>The LOA is a required document</u>** by which a customer authorizes SAP Concur to securely share their data with App Center partners.
- It is a non-negotiable component of the implementation process and without it, a customer can't deploy a partner's integration.

Why it is needed?

- SAP Concur's Customer Contracts prohibit SAP Concur from sharing any customer data with 3rd parties without written consent from the customer—the signed LOA captures this required consent.

Where can I find it?

- The Letter of Authorization can be found on the [Go to Market page](), located in the Resource section of your Partner Place site.
- The [Letter of Authorization FAQ]() is also linked on the Go to Market page.

What does the partner do with it?

- Partners should attach completed LOAs to the [Deal Notification Form]() (unless their integration is set up with the OAuth 2.0 framework).

CUSTOMER AUTHORIZATION TO LINK SERVICES AND EXCHANGE CUSTOMER DATA

The undersigned entity ("Customer") and Concur Technologies, Inc. or one or more Concur affiliates (collectively, "Concur") are parties to a business services agreement (the "Agreement"), under which Concur has been retained to provide certain Concur business services to Customer (the "Service"). In connection with the Service, Concur may obtain access to information with respect to Customer and its agents and affiliates, and each of their respective employees, agents, and users of the Service (collectively, the "Customer Data"). The following Customer Authorization to Link Services and Exchange Customer Data (the "Authorization") governs the use of the Concur's platform services. For purposes of this Agreement "You" shall mean you as the business, government entity, or entities on whose behalf you are accepting this Authorization, and Concur shall mean Concur Technologies, Inc. or one or more Concur affiliates.

You have also entered into an arrangement with ______________________

the provider of certain products or services (the "Provider") that will integrate with the Service and access and use certain Customer Data ("Provider Services").

Notwithstanding anything to the contrary in the Agreement or otherwise, You hereby:

(a) authorize Concur to link the Service with the Provider Services through Concur's API (a description of which can be found at https://developer.concur.com/api-reference/index.html); authorize Concur and Providers to exchange Customer Data relating to the Service and Provider's Service between the Service and Provider's Service; and allow Concur and Providers to use Customer Data for purposes described in their respective agreements with You.

(b) represent and warrant that You (i) have the authority to allow this linking and exchange of Customer Data, (ii) have and will obtain consents and/or authorizations from data subjects and/or Providers for this exchange and use of Customer Data, if required by applicable law, (iii) have and will provide accurate and appropriate notices to data subjects and/or Providers regarding this exchange and use of Customer Data, if required by applicable law, and (iv) will use any Customer Data in compliance with the Agreement with Concur and respective agreements with Providers and in accordance with any notices, statements, or agreements You have provided to data subjects;

(c) confirm that Concur's linking of the Service with the Provider Services under this Authorization shall not be deemed to be part of the Service, with the understanding that Concur will handle and protect Exchanged Data received from Provider in accordance with the Agreement;

(d) waive, release, and forever discharge Concur and all of its officers, directors, employees, shareholders, agents, authorized resellers, and affiliates of the foregoing, and all of their respective successors and assigns, from any and all claims and causes of action, whether known or unknown, which You may have arising out of or relating to 1) Concur's disclosure, delivery, and/or provision of any and all Customer Data through Concur's API to the Provider, 2) receipt of Customer Data from the Provider in accordance with this Authorization and 3) Provider's activities or use of Customer Data; and

(e) indemnify and hold harmless Concur and all of its officers, directors, employees, shareholders, agents, authorized resellers, and affiliates of the foregoing, and all of their respective successors and assigns, from and against any and all loss, damage, liability, and expense arising from any claim brought against any such indemnified party by any third party to the extent the claim relates to any breach of Your representation and warranties, in whole or in part, in section (b) of this Authorization.

This Authorization: (i) shall be binding upon Customer and its successors, assigns and transferees by operation of law or otherwise unless and until revoked by means of a written notice by Customer to Concur; (ii) shall be made and construed in accordance with the laws of the jurisdiction in which the Agreement is governed, without regard to conflicts of laws principles; and (iii) may be executed and transmitted with facsimile signatures, which shall be fully binding and effective for all purposes.

EXECUTED by Customer acting under due and proper authority.

Name:
(full legal name of Customer) ______________________

Signature: ______________________

Signed by: (insert name) ______________________

Title: ______________________

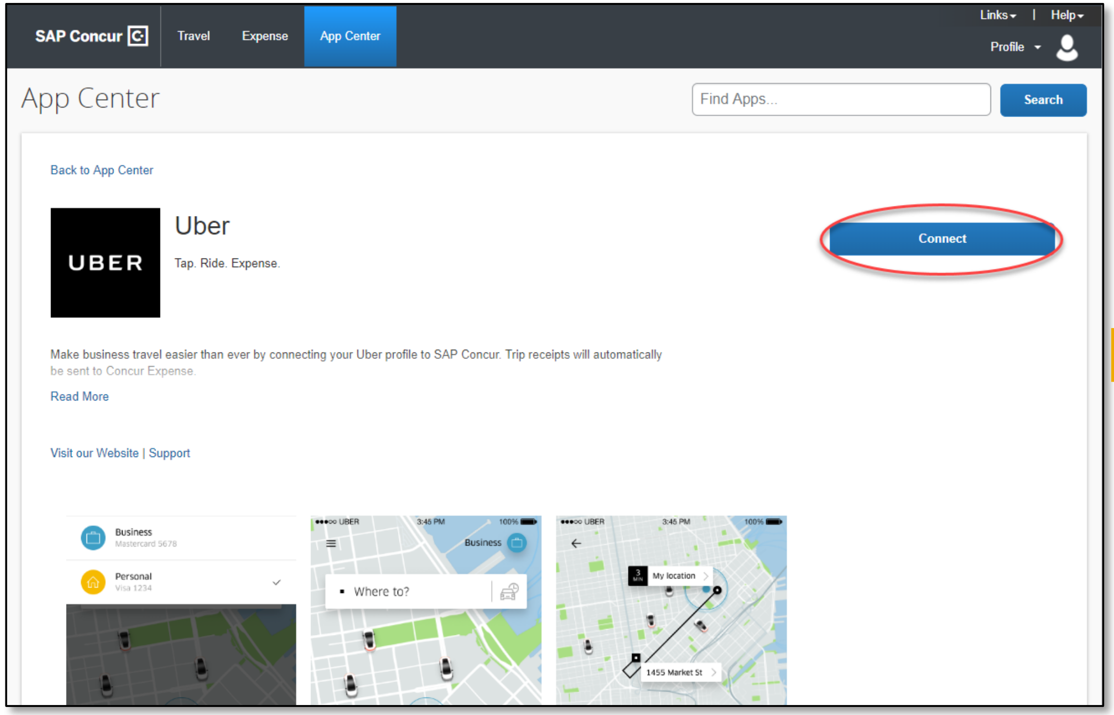
Date Signed: ______________________

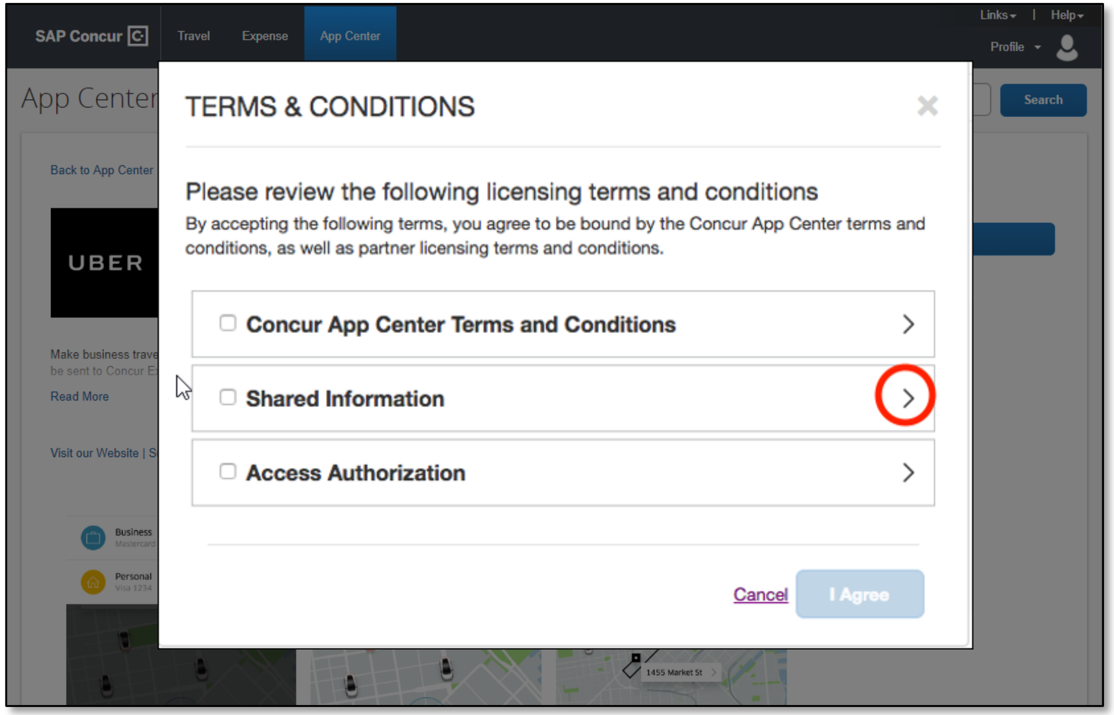
<u>INSTRUCTIONS:</u>
AFTER COMPLETION, PROVIDER TO SEND THIS CUSTOMER AUTHORIZATION TO LINK SERVICES AND EXCHANGE CUSTOMER DATA TO: CONCUR_PARTNERCLIENTACTIVATION@SAP.COM

Last Update: April 8, 2019

Quick Connect and eLOA

- Partners that have developed to the OAuth 2.0 framework (Quick Connect) no longer need customers to sign a physical LOA and to attach that LOA to the DNF
- With Quick Conect, customers can electronically sign the LOA by accepting the Terms & Conditions accessed via the **Connect** button in the partners' App Center listing(s)
- After accepting, customers will be prompted to sign in or create an account for the partner application
- If a customer needs to review the paper LOA, it can be found here





Steps for Requesting Changes to the LOA

1. Before beginning this process, partners should send the customer a copy of Letter of Authorization FAQ to clarify any outstanding concerns.

2. If the customer still requests changes, have them track the desired language changes on the LOA and send the redlined version to concur_AppCenterAlliance@sap.com.

3. The Alliances team will consult the SAP Concur legal team to review requested changes and provide a response to the partner.
   - **Note:** SAP Concur's legal team will never accept full omission of sections of the LOA.

***Quick Connect and eLOA** change requests will also follow the above steps. LOAs with approved changes will be kept on file at SAP Concur, and will supersede the Terms and Conditions the customer agrees to through Quick Connect. The customer will still need to need to click though eLOA steps.

Deal Notification Form (DNF)

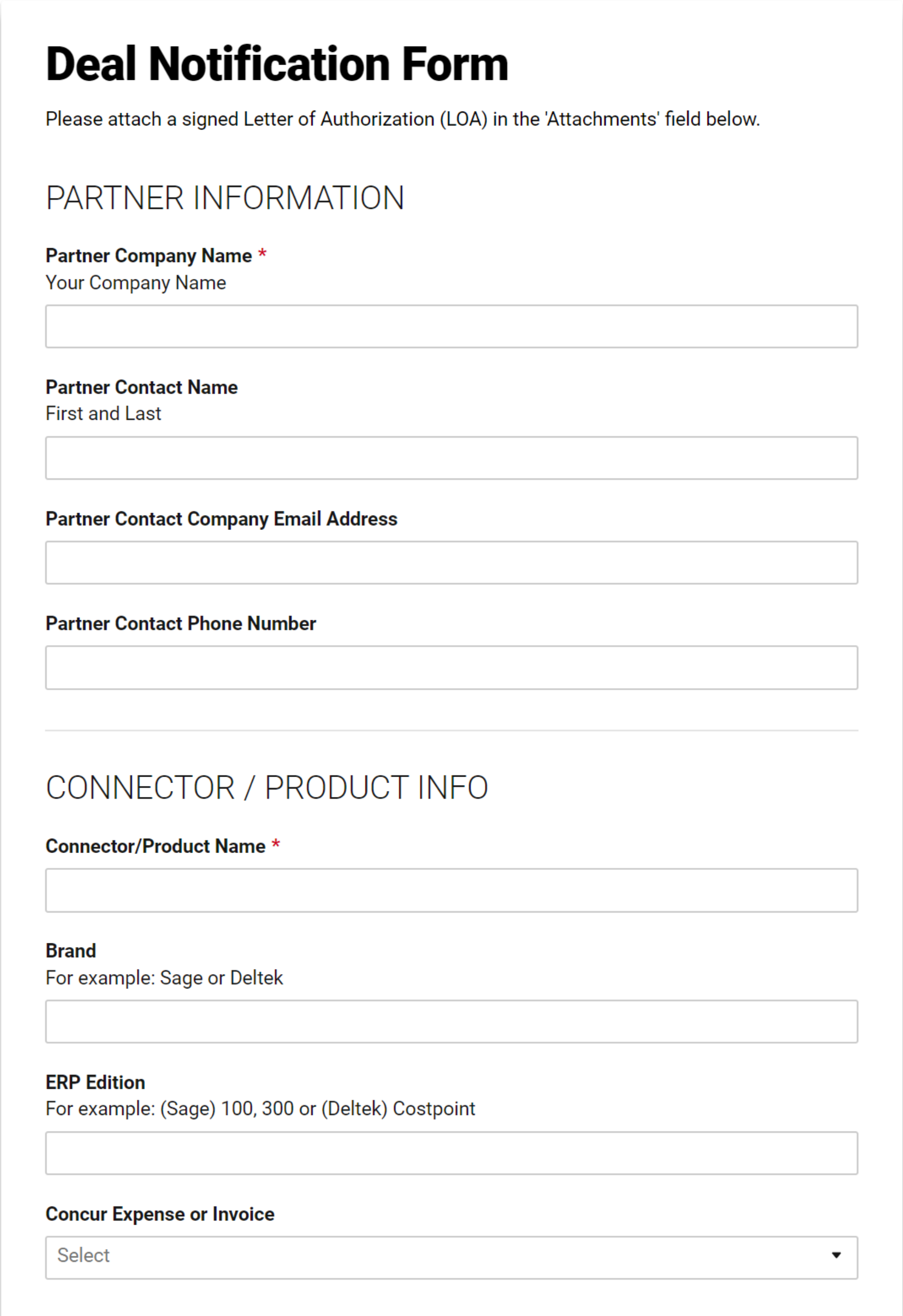
The Deal Notification Form is **MANDATORY for ALL Deals** because:

1. It informs SAP Concur each time a new customer deal has been signed

2. It is used for the tracking, reporting, and invoicing of the revenue share of partner integrations due to SAP Concur

3. For Concur-led deployments, it notifies the App Center team to create a project to initiate implementation

You can access the DNF on the Go To Market page, which is also linked in the Resources section of your Partner Place site.


Deal Notification Form

Please attach a signed Letter of Authorization (LOA) in the 'Attachments' field below.

PARTNER INFORMATION

Partner Company Name *
Your Company Name

Partner Contact Name
First and Last

Partner Contact Company Email Address

Partner Contact Phone Number

CONNECTOR / PRODUCT INFO

Connector/Product Name *

Brand
For example: Sage or Deltek

ERP Edition
For example: (Sage) 100, 300 or (Deltek) Costpoint

Concur Expense or Invoice
Select

DNF: Revenue Share and Implementation

**Revenue Type – ** The cadence of customer payment as it pertains to their contract with the partner

There are three options:

- **Annual Contract Value** – When the partner charges a **consistent/recurring** annual connector fee
- **Quarterly Revenue Sheet** – The App Center sends an Excel file with all the partner's customers on a quarterly basis. The partner must fill this out with the pertinent information and return to concur_AppCenter_BillingInquiry@sap.com.
- **Flat-Fee** – When the customer pays a one-time connector fee

**Annual Contract Revenue Amount – ** The annual billing amount charged to the customer for the integration

SAP Concur will calculate the revenue share from this value.

Deployment & Configuration Type – ** Whether the implementation is **Partner-Led (guided independently by the partner) or **Concur-Led** (requires an SAP Concur implementation project)

If you're unsure if your integration is Concur- or Partner-led, you can reach out to concur_AppCenterAlliance@sap.com.

REVENUE SHARE INFORMATION

Revenue Type *

Select

Annual Contract Revenue Amount *

Annual contract revenue billing amount (i.e $50,000) to end-customer. (Note: Please put your revenue here and Concur will calculate its own share)

Currency *

Please put the currency of the revenue (EUR, USD, GBP, etc)

Minimum Annual Commitment Amount (ACE Only)

If you're a member of the ACE program, please provide the Minimum Annual Commitment Amount.

CONCUR INVOLVEMENT?

Concur Referred? *

Did a Concur Representative refer this lead to you?

Select

Concur Rep Name

If Concur Rep referred, please enter name (first & last)

DEPLOYMENT / CONFIGURATION

Deployment & Configuration Type *

Partner-Led/Self guided (No assistance from Concur is needed)

Concur-Led, project queue timeline is 4-6 weeks (Concur assistance is needed)

Select

Deployment & Configuration Types

Partner-Led

An implementation is Partner-Led (or Self-Guided) when an SAP Concur resource is **NOT** required to assist with the implementation of a partner application. The partner is expected to assist the customer in implementation.

1. Partner signs a deal with a customer
2. Partner fills out a Deal Notification Form (DNF)
3. Partner receives email notification from SAP Concur confirming the deal
4. Partner instructs customer to deploy integration by:
   - Clicking “Connect” on the partner’s App Center listing and virtually agreeing to the LOA
   - Giving partner-specific instruction on how to implement the integration

Concur-Led

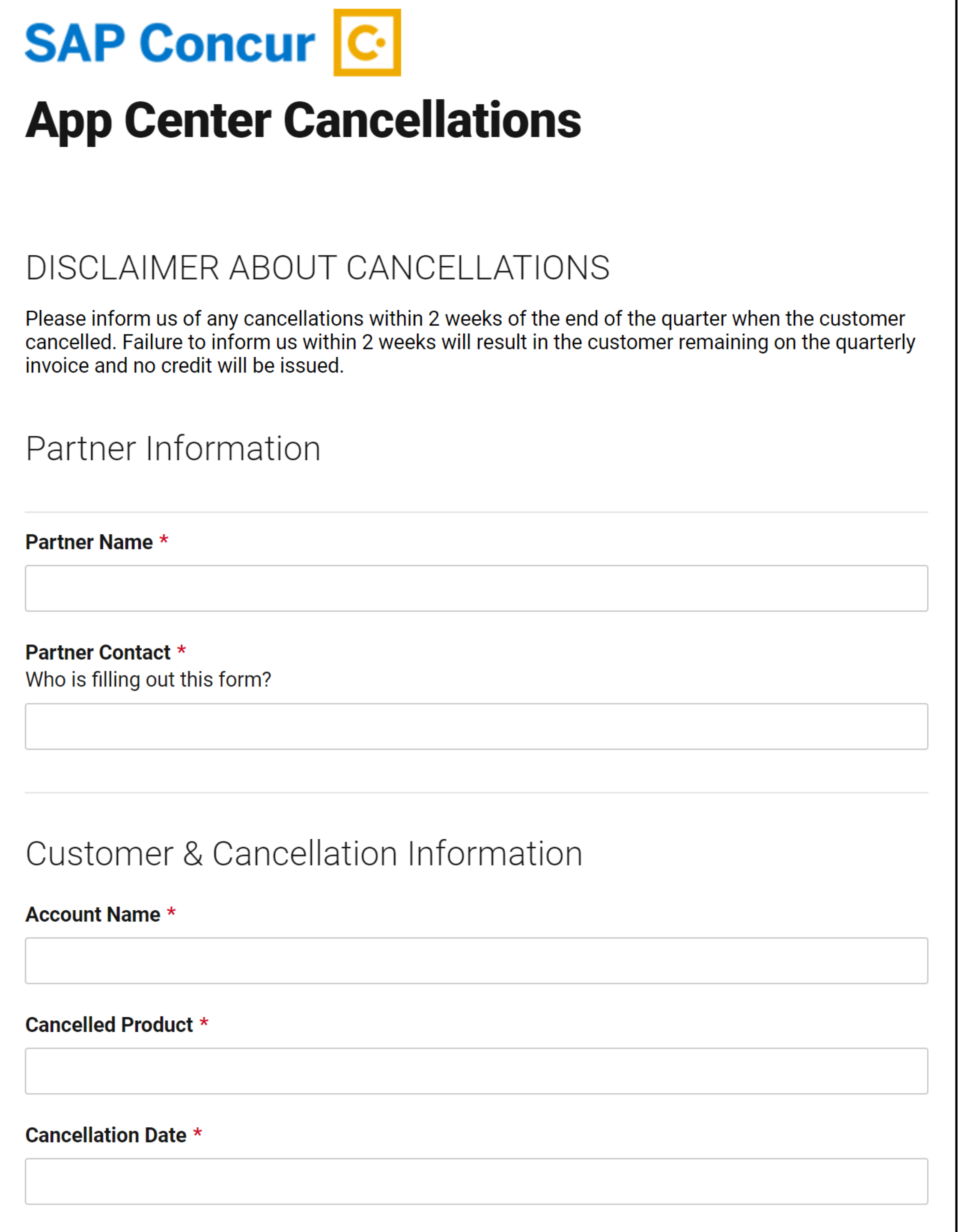
An implementation is Concur-led when a SAP Concur resource **IS** required to deploy a partner’s application. Both SAP Concur and the partner assist the customer in implementation.

1. Partner signs a deal with a customer
2. Partner has the customer sign the Letter of Authorization (LOA)
3. Partner fills out a Deal Notification Form (DNF) and attaches the LOA
   - Partner includes the contact information for the customer’s implementation/tech resource
4. SAP Concur creates a project and assigns a Project Manager
5. Once assigned, the SAP Concur Project Manager reaches out to the partner and customer to assist with deployment (within 4 to 6 weeks)
6. SAP Concur Project Manager works with the partner and customer to assist with implementation
   - Implementation timeline is dependent on whether the customer’s SAP Concur instance is Live or still in implementation
     - Live – Within 4-8 weeks
     - In Progress – Timeline is dependent on their Configuration is dependent on main schedule.

Customer Cancellations

- If a customer cancels your service, please submit a cancellation form within 2 weeks of the end of the quarter.
- If a customer cancellation notification is not sent within 2 weeks of the end of a quarter, the customer won’t be removed from that quarter’s invoice.
- Further information on credits and cancellations can be found on the next slide.

You can access the customer cancellation form here.



SAP Concur

App Center Cancellations

DISCLAIMER ABOUT CANCELLATIONS

Please inform us of any cancellations within 2 weeks of the end of the quarter when the customer cancelled. Failure to inform us within 2 weeks will result in the customer remaining on the quarterly invoice and no credit will be issued.

Partner Information

Partner Name *

Partner Contact *
Who is filling out this form?

Customer & Cancellation Information

Account Name *

Cancelled Product *

Cancellation Date *

Fees and Invoicing Guidelines

Membership & App Listing Fees

- Prior to your App being listed in the App Center, the initial Membership and/or App Listing Fees must be paid in full in order to go-live.

Credits

- Customer terminations must be submitted within 2 weeks of the end of the quarter. For example:
  - If a customer terminates on 9/1, we must receive notification by 10/14 to receive all credit due.
  - If the form is received past this date, acredit will not be authorized for that quarter(s).
  - A cancellation form must be submitted to fully cancel a customer.

For questions regarding the Deal Notification Form, contact:

SAP Partner Client Activation

Invoicing

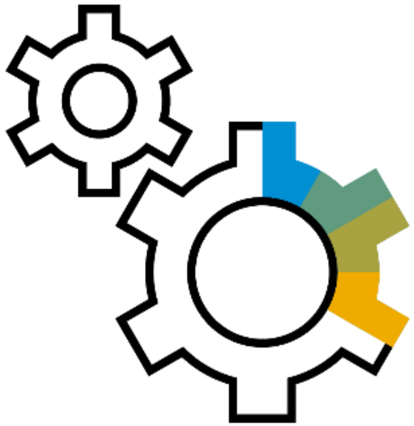
- Invoicing is done on a quarterly basis in the arrears.
  - For example: Jan – Mar invoicing will be sent out in early Q2.
- Invoicing is based on the Deal Notification Form(s) (DNF) we receive when partners sign deals with customers.
- All billable fees are based on the Partner Agreement signed by both parties.
- Pre-billing files can be sent to partners that want to ensure Invoices are correct before being submitted.

For questions regarding Invoicing, contact:

App Center Billing Inquiry

Operations

ERP Partners



SAP Concur

ERP Connector Requirements Form

For ERP Connector Partners only

Before submitting the Deal Notification Form, **ERP connector partners** must submit an [ERP Connector Requirements Form](). See the description in the yellow box.

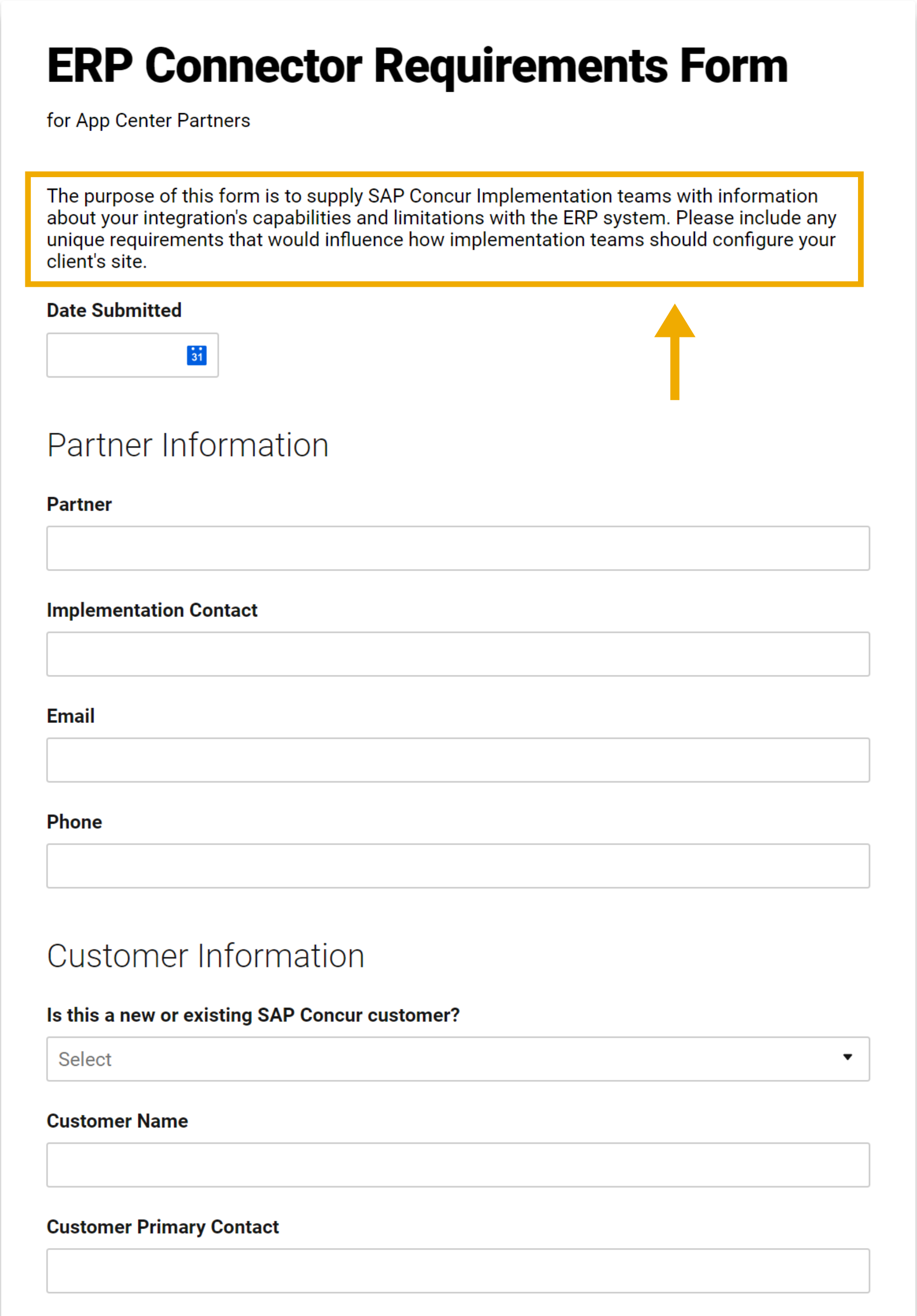
The partner should submit the requirements form as early as possible in each new customer deal's implementation process.

- **Note:** You may not know all of the information yet. That's okay! The purpose of the form, first and foremost, is for SAP Concur implementation to be made aware that there is an ERP connector partner involved in this new customer's instance.

To adopt the App Center ERP Specifications Sheet process:

1. Submit this form for every client you sign, including any unique instructions for their implementation. Once received, our Operations team will attach it to:
2. The client's Salesforce Customer Account
3. The client's Expense and/or Invoice implementation project

Once the integration project is underway and a go-live date is secured, submit a [Deal Notification Form (DNF)](). This should always be submitted before the customer goes live.



ERP Connector Requirements Form

for App Center Partners

The purpose of this form is to supply SAP Concur Implementation teams with information about your integration's capabilities and limitations with the ERP system. Please include any unique requirements that would influence how implementation teams should configure your client's site.

Date Submitted

Partner Information

Partner

Implementation Contact

Email

Phone

Customer Information

Is this a new or existing SAP Concur customer?

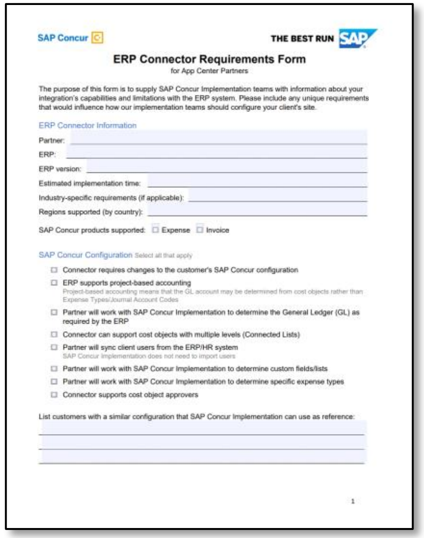
Select

Customer Name

Customer Primary Contact

ERP Connector Requirements Form Library

For ERP Connector Partners only


SAP Concur

THE BEST RUN SAP

ERP Connector Requirements Form

for App Center Partners

The purpose of this form is to supply SAP Concur Implementation teams with information about your integration's capabilities and limitations with the ERP system. Please include any unique requirements that would influence how our implementation teams should configure your client's site.

ERP Connector Information

Partner: ____

ERP: ____

ERP version: ____

Estimated implementation time: ____

Industry-specific requirements (if applicable): ____

Regions supported (by country): ____

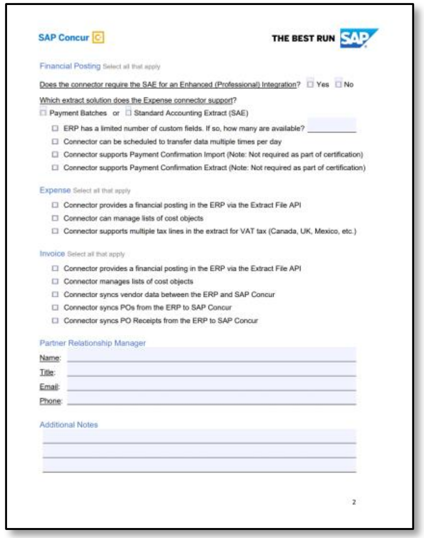
SAP Concur products supported: ☐ Expense ☐ Invoice

SAP Concur Configuration Select all that apply

- ☐ Connector requires changes to the customer's SAP Concur configuration
- ☐ ERP supports project-based accounting
  Project-based accounting means that the GL account may be determined from cost objects rather than Expense Types/Journal Account Codes
- ☐ Partner will work with SAP Concur Implementation to determine the General Ledger (GL) as required by the ERP
- ☐ Connector can support cost objects with multiple levels (Connected Lists)
- ☐ Partner will sync client users from the ERP/HR system
  SAP Concur Implementation does not need to import users
- ☐ Partner will work with SAP Concur Implementation to determine custom fields/lists
- ☐ Partner will work with SAP Concur Implementation to determine specific expense types
- ☐ Connector supports cost object approvers

List customers with a similar configuration that SAP Concur Implementation can use as reference:

1


SAP Concur

THE BEST RUN SAP

Financial Posting Select all that apply

Does the connector require the SAE for an Enhanced (Professional) Integration? ☐ Yes ☐ No

Which extract solution does the Expense connector support?

☐ Payment Batches or ☐ Standard Accounting Extract (SAE)

- ☐ ERP has a limited number of custom fields. If so, how many are available? ____
- ☐ Connector can be scheduled to transfer data multiple times per day
- ☐ Connector supports Payment Confirmation Import (Note: Not required as part of certification)
- ☐ Connector supports Payment Confirmation Extract (Note: Not required as part of certification)

Expense Select all that apply

- ☐ Connector provides a financial posting in the ERP via the Extract File API
- ☐ Connector can manage lists of cost objects
- ☐ Connector supports multiple tax lines in the extract for VAT tax (Canada, UK, Mexico, etc.)

Invoice Select all that apply

- ☐ Connector provides a financial posting in the ERP via the Extract File API
- ☐ Connector manages lists of cost objects
- ☐ Connector syncs vendor data between the ERP and SAP Concur
- ☐ Connector syncs POs from the ERP to SAP Concur
- ☐ Connector syncs PO Receipts from the ERP to SAP Concur

Partner Relationship Manager

Name: ____

Title: ____

Email: ____

Phone: ____

Additional Notes

2

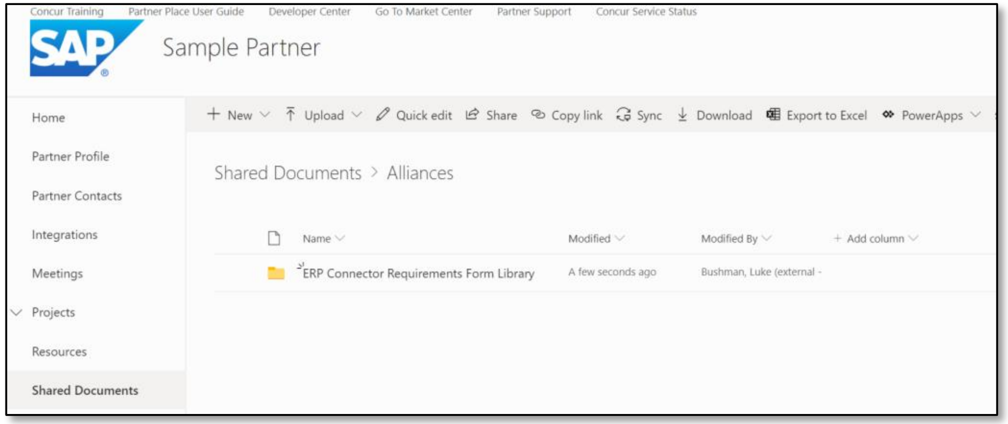
In addition to submitting the web version of the Requirements Form for each customer deal, ERP connector partners must also keep up-to-date generic Requirements Forms that include the total capability for each ERP. These will be stored in your Partner Place site so they will be accessible to our implementation teams for reference when speaking with clients about your connectors.

<u>To create your Requirements Form library</u>:

1. Fill out the PDF version of the form for each of your ERP connectors with all of its capabilities. Save the file as:

PARTNER NAME] – [ERP NAME] Requirements Form

1. Go to your Partner Place site. If you have questions about this step, email concur_AppCenterAlliance@sap.com.
2. Go to **Shared Documents > Alliances > ERP Connector Requirements Form Library**.
3. Upload the files for all of your connectors to the folder.
   - **Note:** It's important that you keep these documents up-to-date with any changes to the integration capabilities.



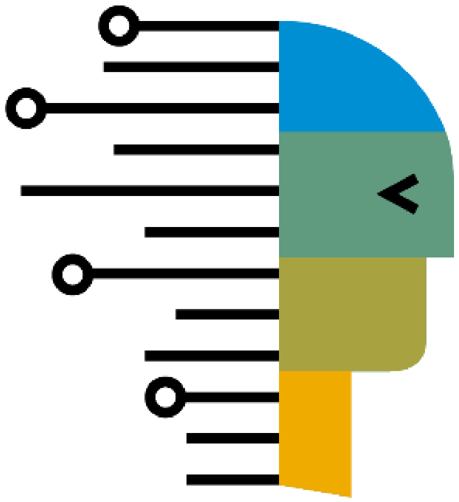
ERP Connector Requirements Form: Operational Process

Partner receives a Lead → Partner closes deal → Partner submits [ERP Connector Requirements Form] → Operations attaches form to SFDC project notes → Implementation engages Partner during implementation

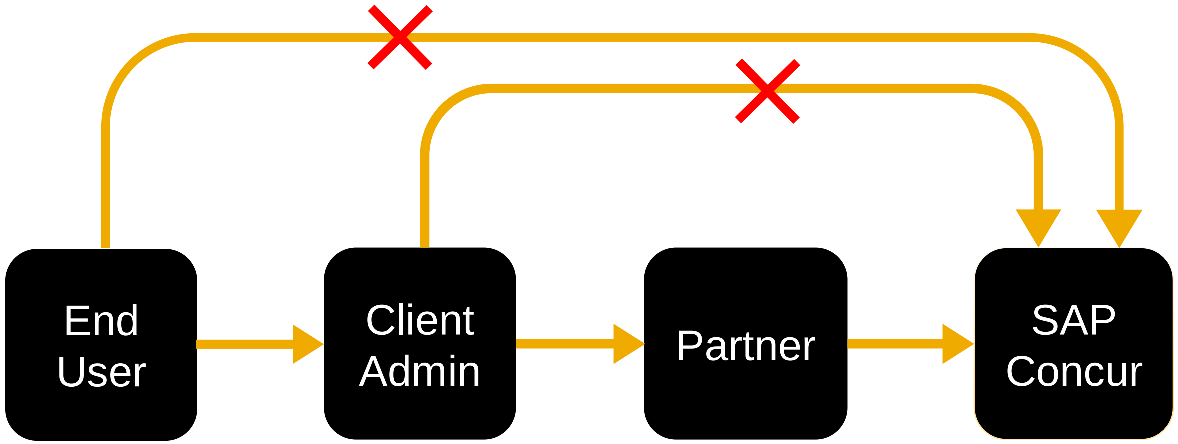
Requirements Form Library

Partner's generic connector requirements stored in Partner Place folder for SAP Concur implementation access

Support



Support Process



<u>Level 1 Support</u>: The Partner

In the case of a customer issue, the partner is always the first line of support. The partner is responsible for:

- Educating the customer about their App Center integration
- Supplying customer admins and users with a method to report a problem
  - <u>Note</u>: This should coincide with the **Support** link on the partner integration's App Center listing
- Educating the customer on the support process
- Enforcing the level 1 policy with customers and **NOT** asking them to contact SAP Concur directly

<u>Level 2 Support</u>: SAP Concur

If the partner is unable to resolve the customer issue, or if they are able to determine whether the error will require an SAP Concur resource, **the partner should <u>submit a support ticket to SAP Concur</u> through the support portal**.

Note: End users and customers should **NOT** contact SAP Concur with partner integration support issues

Who should submit the Support Case? Customer vs. Partner

If an issue is not simply between the customer's SAP Concur instance and the integration, but has something to do with the SAP Concur functionality, a ticket should be submitted.

A CUSTOMER should only submit a case if:

- There is a glitch in their SAP Concur instance
- An SAP Concur report is not pulling correctly

The PARTNER should submit the case if:

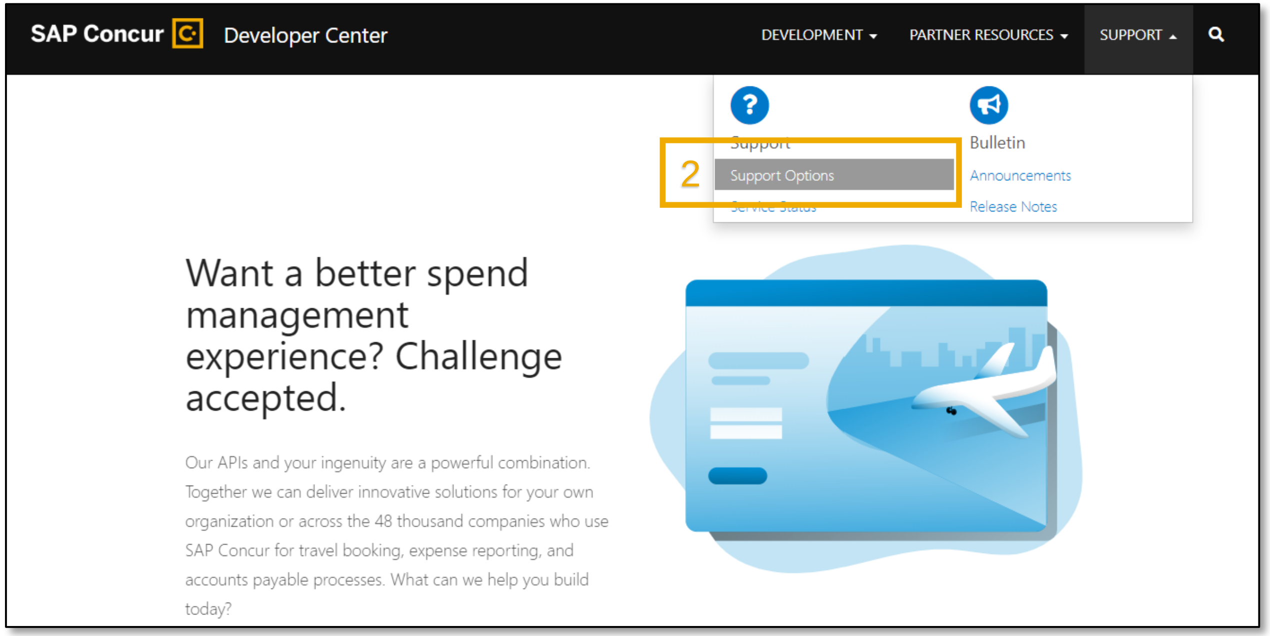
- A customer is receiving an error from the partner's callouts
- Partner data is not populating correctly to the connector, but all is correct on the partner side

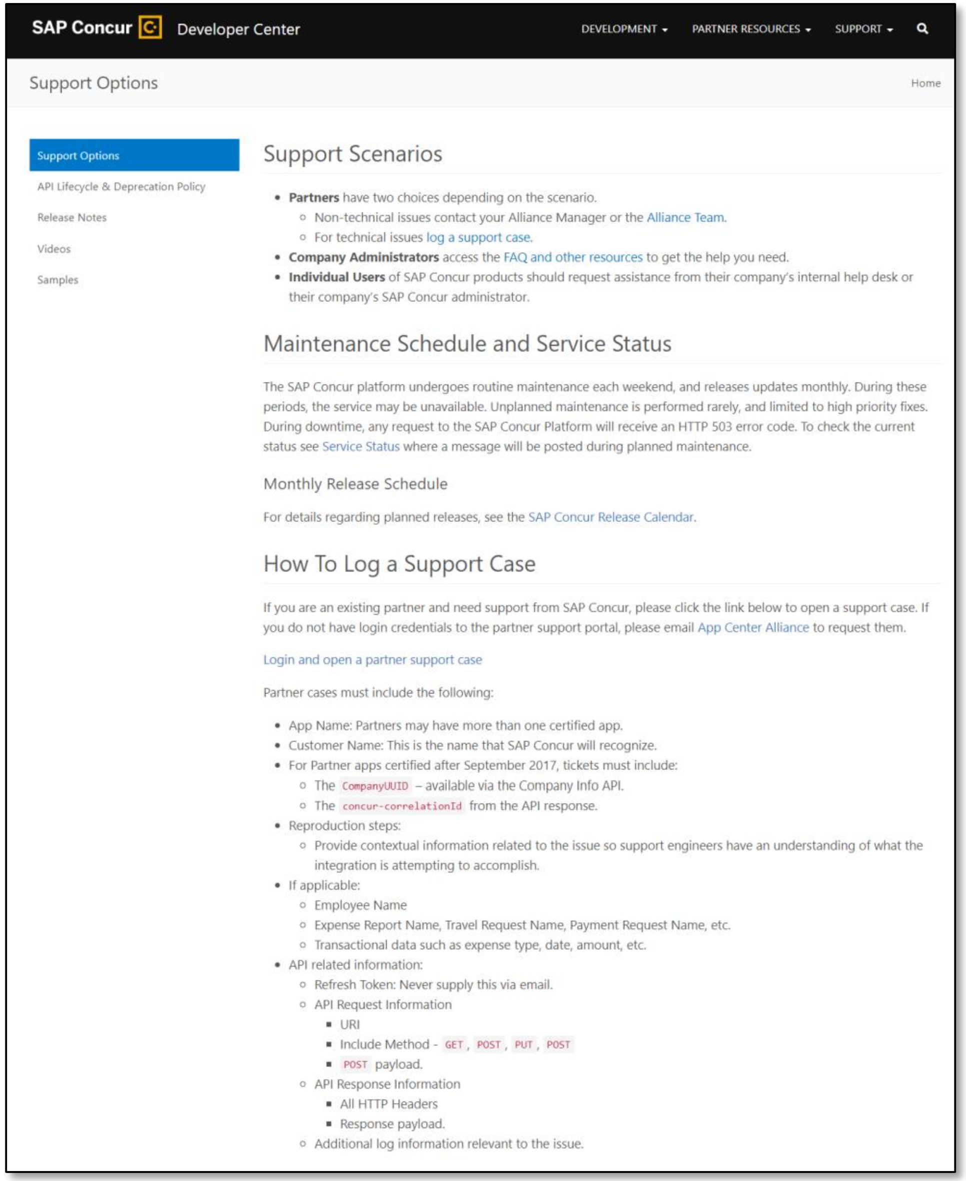
Support Scenarios

To access technical support information and links:

1. Go to the [SAP Concur Developer Center](#)

2. Click on the **Support** dropdown menu and select **Support Options**

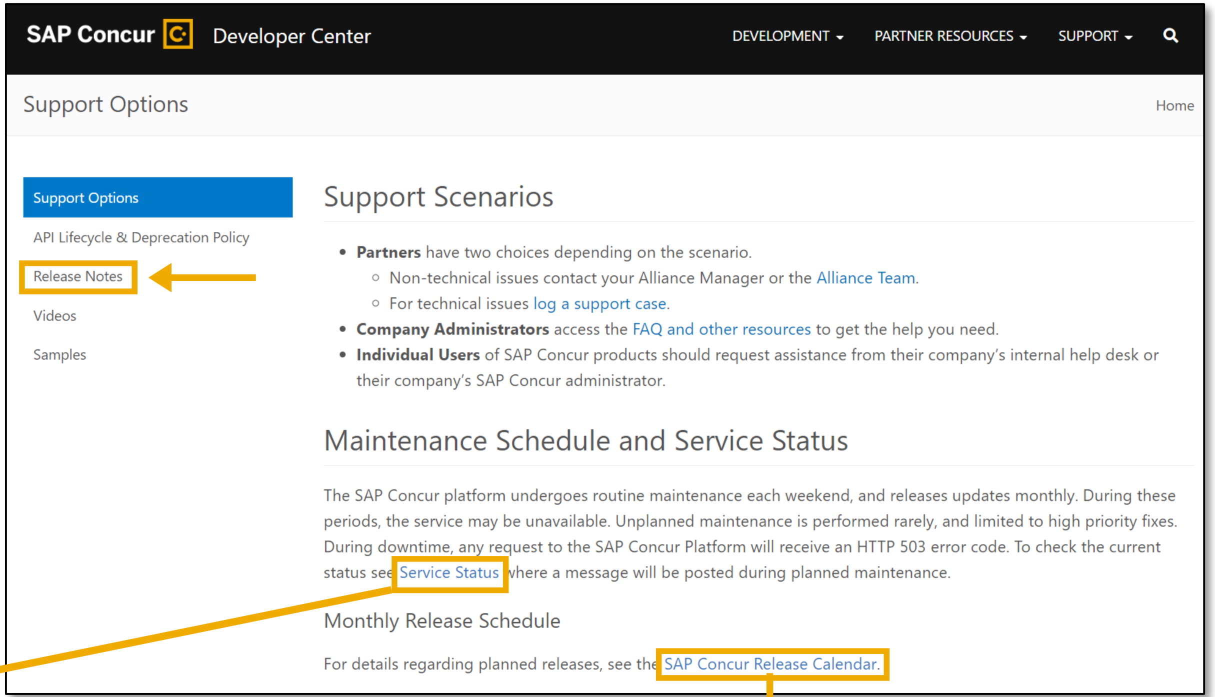


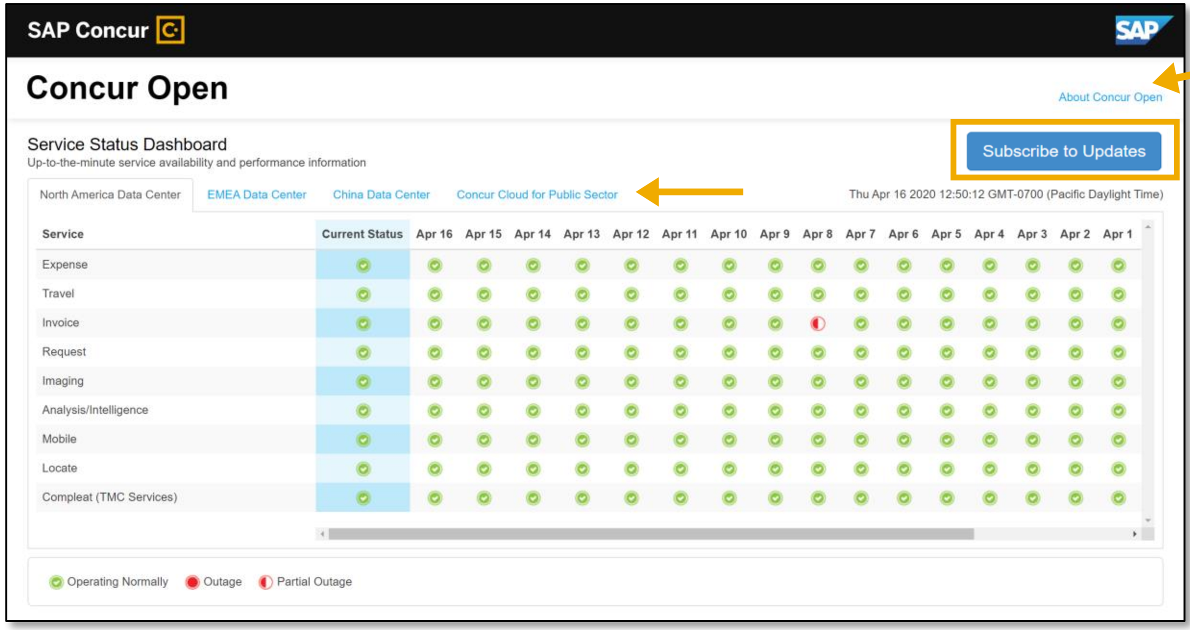


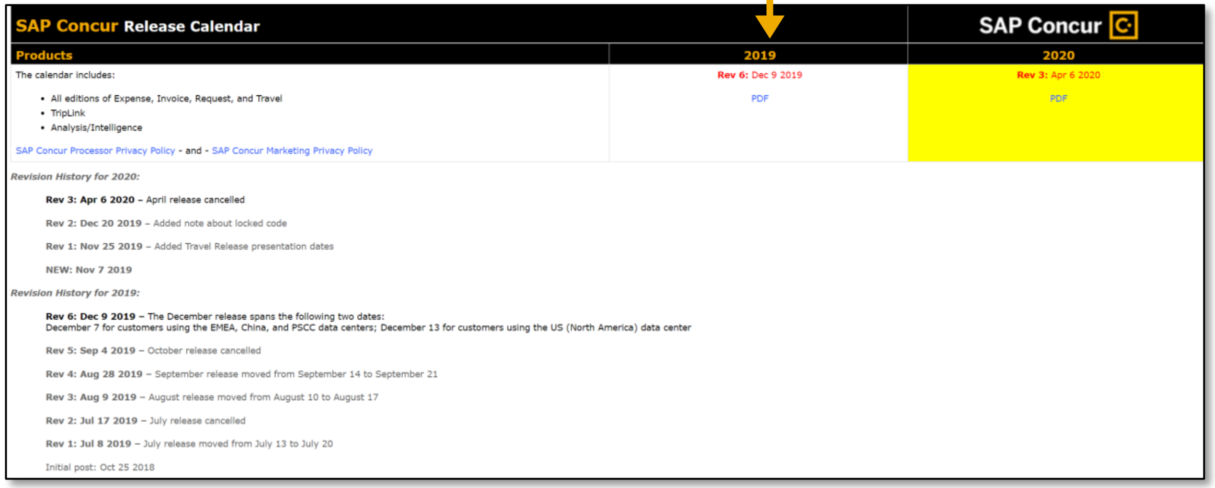
Navigating Concur Open

Concur Open includes resources for partners stay up-to-date on routine maintenance on the SAP Concur platform.

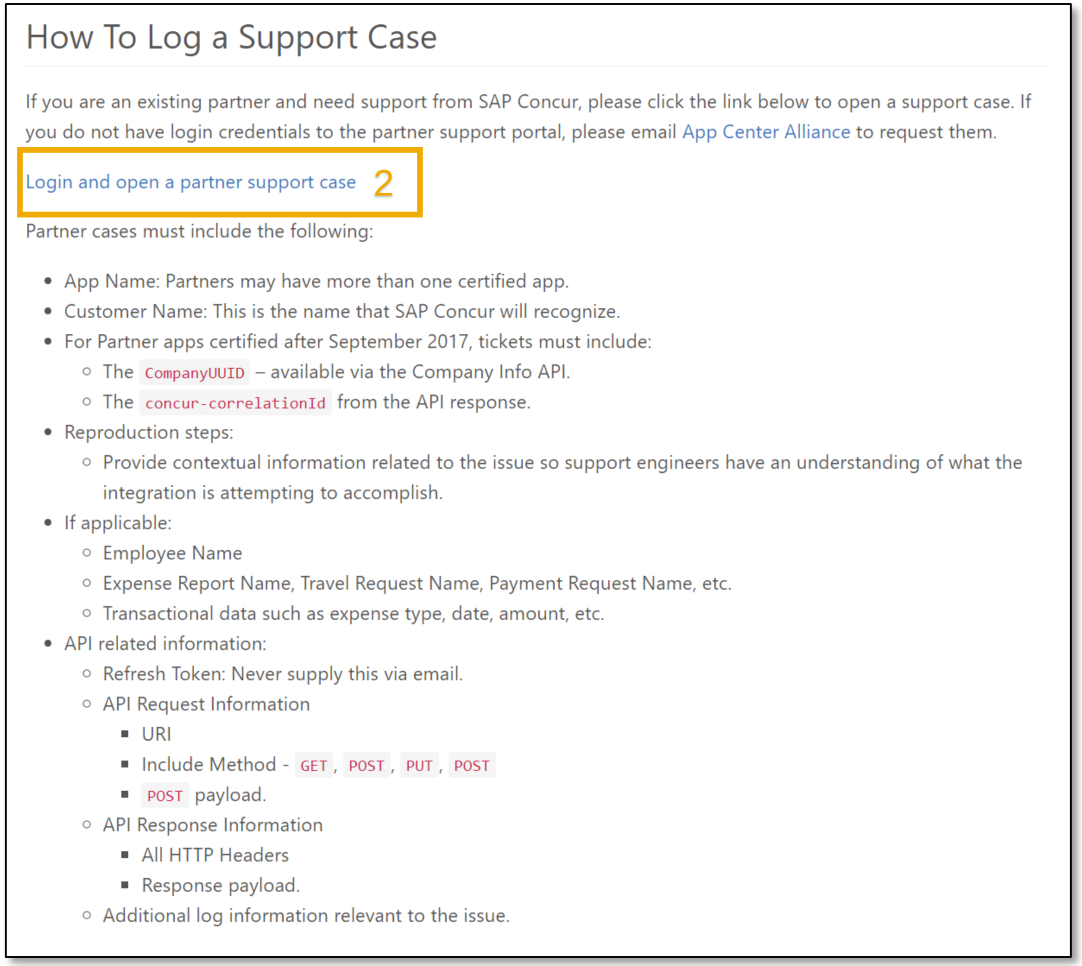
- **Service Status Dashboard**: Review scheduled maintenance to understand when and why there will be outages that affect your integrations and customers.
  - To receive notification regarding this schedule, log in and click **Subscribe to Updates.**
  - If you subscribe to updates, you'll get a **Root Cause Analysis (RCA)** for the service outage.
- **Release Calendar**: See when SAP Concur releases occurred. Specific modifications can be viewed in the **Release Notes**.







Logging a Support Case



How To Log a Support Case

If you are an existing partner and need support from SAP Concur, please click the link below to open a support case. If you do not have login credentials to the partner support portal, please email App Center Alliance to request them.

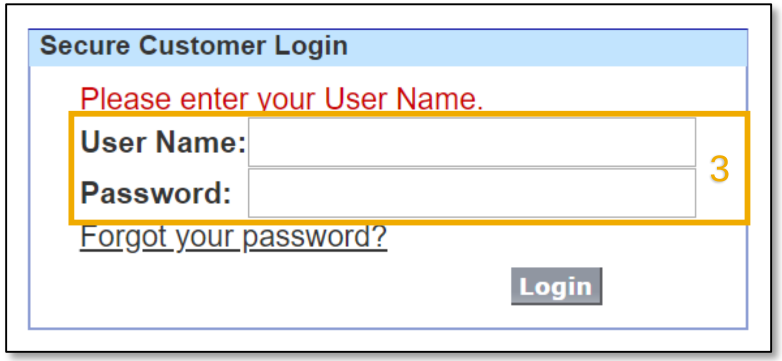
Login and open a partner support case 2

Partner cases must include the following:

- App Name: Partners may have more than one certified app.
- Customer Name: This is the name that SAP Concur will recognize.
- For Partner apps certified after September 2017, tickets must include:
  - The `CompanyUUID` – available via the Company Info API.
  - The `concur-correlationId` from the API response.
- Reproduction steps:
  - Provide contextual information related to the issue so support engineers have an understanding of what the integration is attempting to accomplish.
- If applicable:
  - Employee Name
  - Expense Report Name, Travel Request Name, Payment Request Name, etc.
  - Transactional data such as expense type, date, amount, etc.
- API related information:
  - Refresh Token: Never supply this via email.
  - API Request Information
    - URI
    - Include Method - `GET`, `POST`, `PUT`, `POST`
    - `POST` payload.
  - API Response Information
    - All HTTP Headers
    - Response payload.
  - Additional log information relevant to the issue.

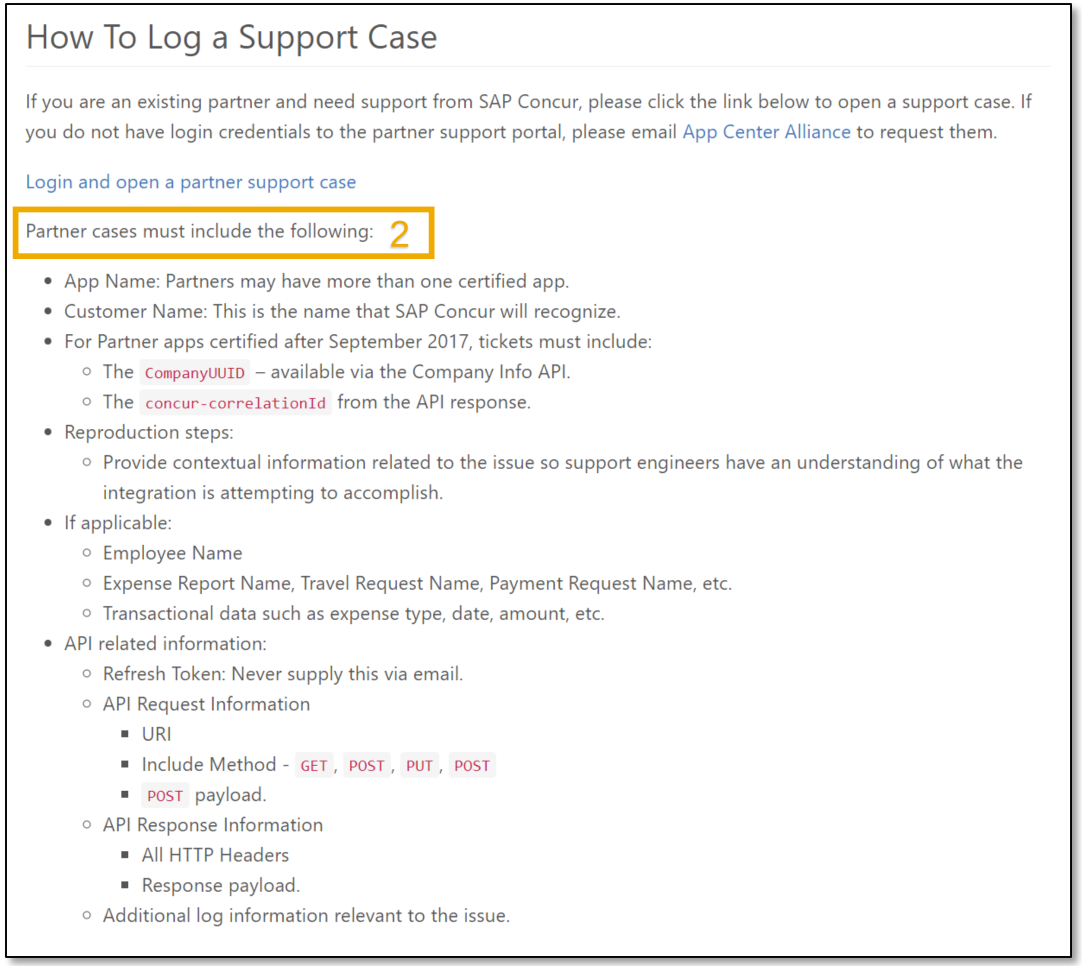
In order to log a support case on behalf of a customer, the partner must:

1. Contact concur_AppCenterAlliance@sap.com and request Support Portal credentials (if they haven't already done so).
   - The partner will receive an Authorized Support Contact (ACS) user name and temporary password via email.
2. On the Support Options page, click **Login and open a partner support case.**
3. Log in to change the password and submit the support case.



continued…

Logging a Support Case



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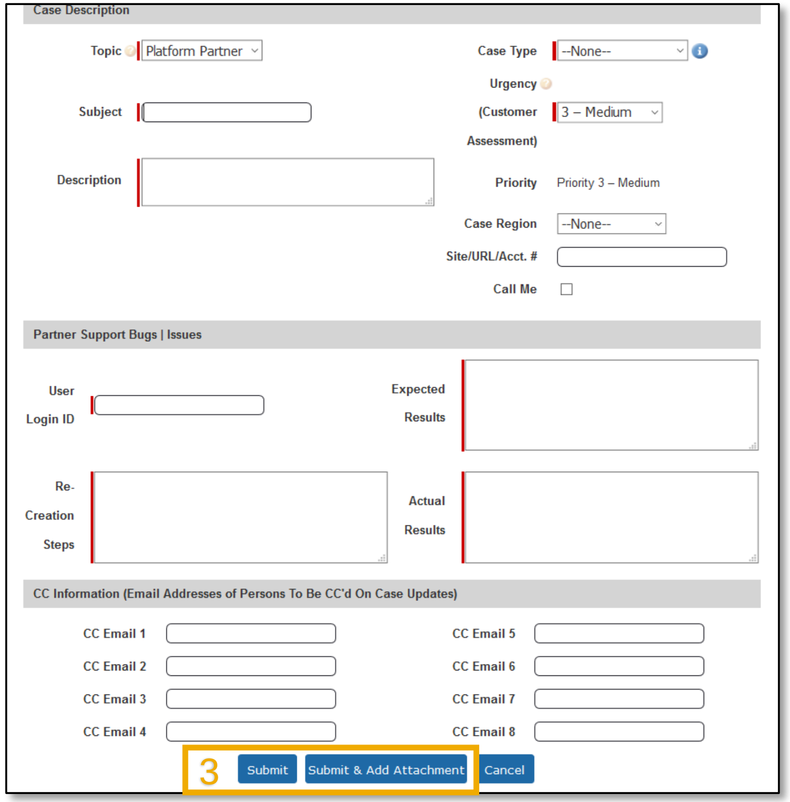
    - Include Method - `GET`, `POST`, `PUT`, `POST`
    - `POST` payload.
  - API Response Information
    - All HTTP Headers
    - Response payload.
  - Additional log information relevant to the issue.

On the Support Portal home page:

1. Click **Create a Case.**
2. Include the details outlined in How to Log a Support Case.
3. Click **Submit** or **Submit & Add Attachment.**
   - Once submitted, an SAP Concur resource will be assigned to address the customer issue.

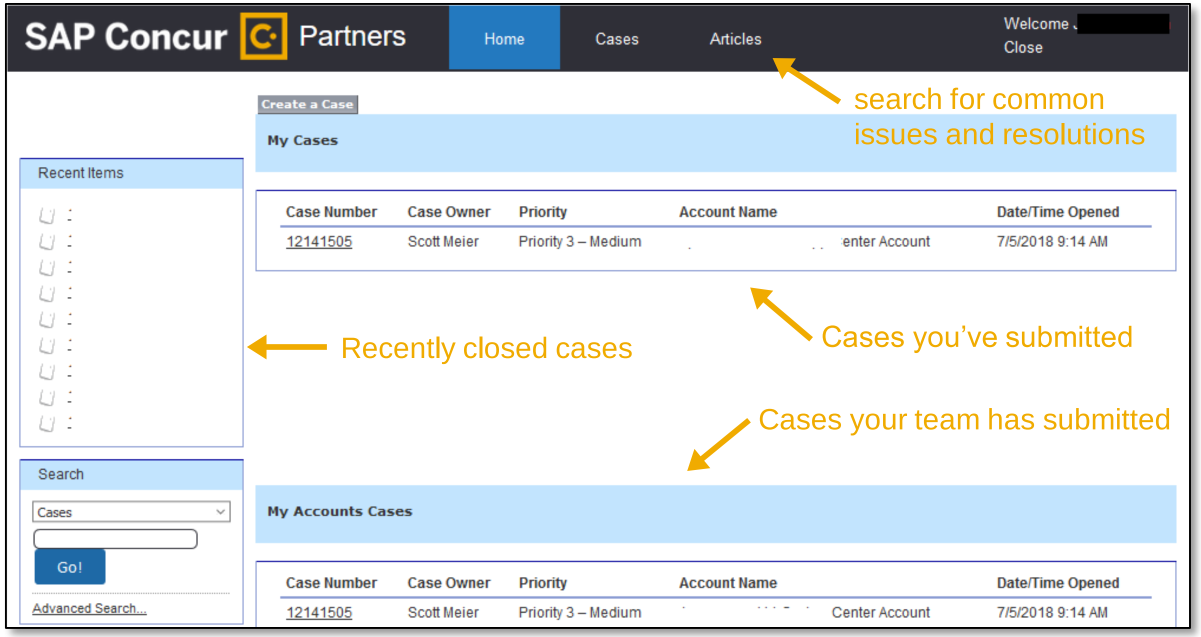


Support Case Follow-up and Escalation

Once a case has been submitted, it will appear in the My Cases section of the Support Portal home page.

If a case becomes urgent, it can be escalated. To escalate a support case:

1. Click on the case number
2. In the Case Detail window that appears, click **Escalate**
   - SAP Concur will be notified of the escalation
   - A red arrow will appear next to the case number



If the partner is for whatever reason unable to get in touch with the support resource assigned to the case, they should reach out to PartnerApplicationSupport@sap.com and CC concur_AppCenterAlliance@sap.com.