SAP Concur

App Center
Partner Guidebook

Introduction

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

Over the last decade, we've invested in building one of the most partner-centric programs of its kind in the industry. Our teams will be available to you at every step of the journey – 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 300 solutions which can't all be center stage, so the work has only just begun. In the last 5 years, we have helped deliver an average of 8,000 leads per year 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 customer-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 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 concur_AppCenterAlliance@sap.com.

Partner Guidebook Table of Contents

App Center Aliases

Partner Success	concur_AppCenterAlliance@sap.com
Operations	concur_PartnerClientActivation@sap.com
Billing	concur_AppCenter_BillingInquiry@sap.com
Support	SAPConcurPartnerSupport@sap.com

Links

- SAP Concur Developer Center
- Go To Market Resources
- SAP Concur Global Learning Services Training Toolkit

Quick Reference

Best Practices for App Center Success

1. Upon go-live, work with your Partner Success manager (concur_AppCenterAlliance@sap.com) to facilitate introductions with the account teams of customers who are already interested in your App Center integration
   - This will build your foundation within SAP Concur by generating success stories that promote awareness of your integration(s)
2. Keep your integration up-to-date on the latest API updates by having your technical team review our Release Notes
3. Understand where your integration is most successful and effective in the Customer Lifecycle
4. Use the Marketing Toolkit to create the recommended Marketing content and work with your Certification Project Manager to add it to your listing
   - Update marketing content and your App Center listing annually – newer content is more visible to our field and pushes awareness within SAP Concur
5. Utilize the Partner Management Hub in SharePoint and the Go-to-Market resources
6. Assign internal resources to manage the LOA and DNF process
   - Streamlining your deal acquisition process and reporting your deals increases your visibility within the App Center
7. Prioritize prompt Lead follow-up with our sales reps and keep them in the loop with the deal process
8. Update concur_AppCenterAlliance@sap.com with any changes in primary business and technical contacts for the partnership, support contacts, and lead recipients
9. Nurture relationships with SAP Concur sales reps and directors
   - Ask if, beyond leads you've received, there are any accounts they manage that would benefit from your offering
10. Sponsor Events
11. Know how to use our Support Process to ensure smooth and swift resolutions to customer issues
12. Subscribe your team to the quarterly PartnerLINK Newsletter for important updates like business or technology changes, upcoming events, and marketing opportunities by emailing concur_AppCenterAlliance@sap.com

Partner Tasks by App Center Team

Business Development	Technical Enablement	Sales	Operations	Partner Success
▪ Hand-off from Business Development to Partner Success ▪ Add new App Center integration(s) ▪ Receive an invite to the App Center Partner Orientation	▪ Certify partner integrations ▪ Make integration modifications ▪ Get support for integration and customer technical issues ▪ Access the partner sandbox ▪ Testing a customer's integration ▪ Add new partner integration marketing materials ▪ Modify partner listings	▪ Connect with sales teams about a partner integration ▪ Get introduced to a customer's SAP Concur account team	▪ 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 ▪ Subscribe to the PartnerLINK Newsletter ▪ Sponsor events ▪ Customer Testimonials
Contact Partner Success	Contact Partner Success	Contact Partner Success	Contact Operations Contact App Center Billing	Contact Partner Success

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 PartnerLINK 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 notify SAP Concur of my first deal?
- How do I connect with SAP Concur implementation?
- I have a customer-specific question. Where do I go?
- I have an unhappy customer. 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.

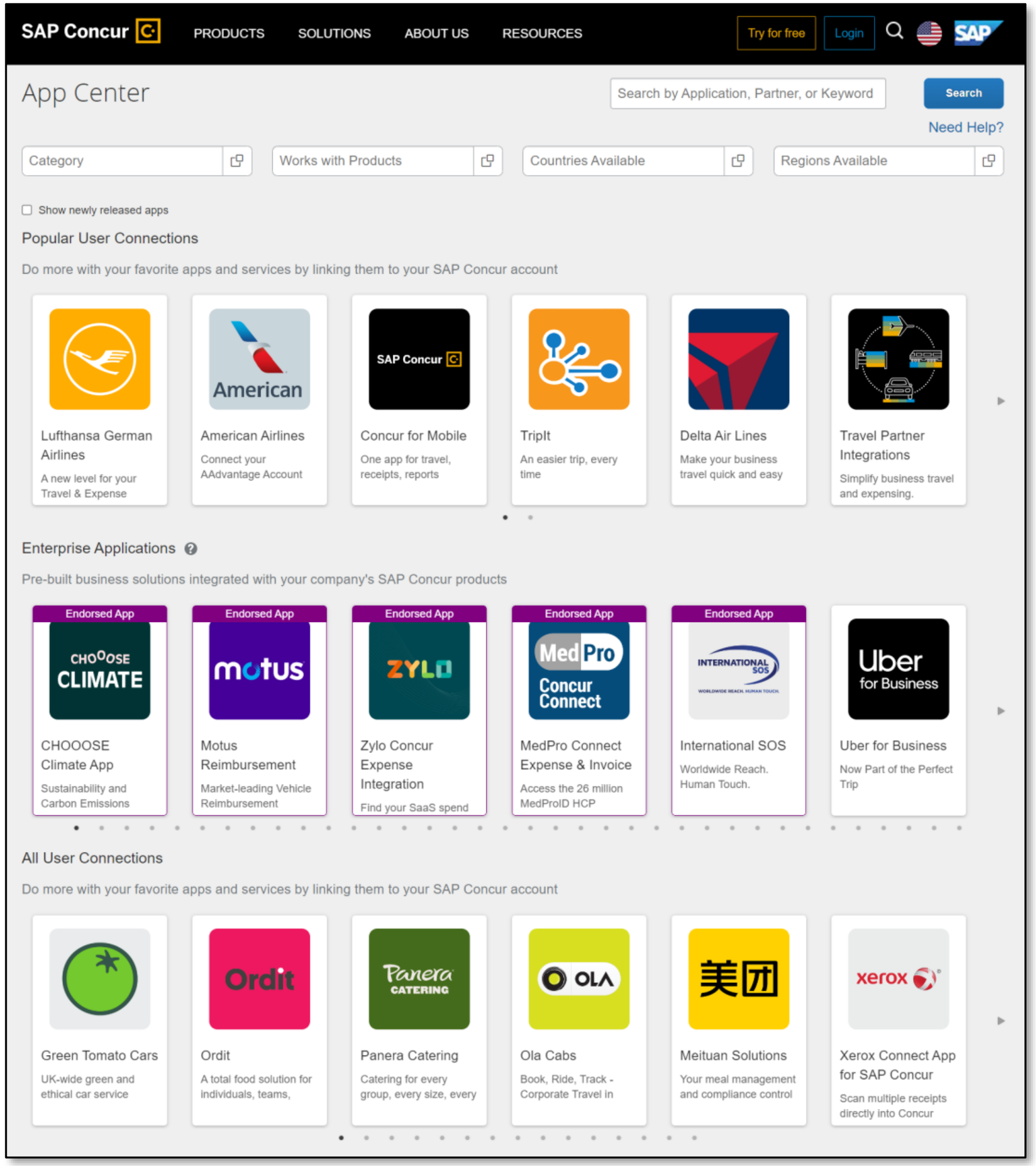
The App Center can be accessed at www.concur.com/app-center. Apps are sorted by:

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

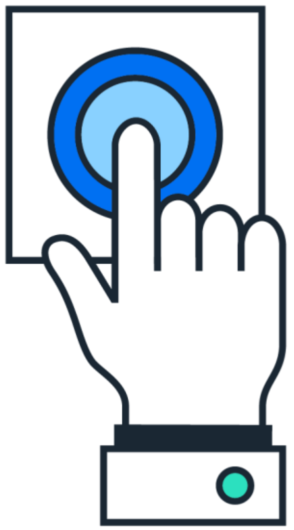
  Connections are pre-filtered for users based on their location and whether they have access to Concur Travel, Concur TripLink, or Concur Expense or Invoice

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

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



Action Items for Partner Launch



When being onboarded, partners are responsible for executing these action items:

1. **Complete App Certification**
   a. Partner technical teams initiate certification by completing the Partner Project Readiness Form.
   b. For more information about Certification and to view Prezis regarding Enterprise and eReceipts apps, visit this site.

2. **Utilize the iMeet Central Workspace**
   a. During certification and after its completion, partner technical teams can return to use the iMeet Central work space to:
      i. Make changes to their current integration or initiate a project for migrating to new APIs using the Partner Project Readiness Form.
   b. For more information on how to utilize the site, partners can refer to the User Guide for Partners.

3. **Build a Listing**
   a. In parallel with certification, your Certification Project Manager will review and provide feedback on your listing form and any marketing content you want to include in your listing. You will work together to approve the final content and build your App Center listing.
   b. To maximize the impact of your listing, visit the Go-to-Market page with a special focus on the "Marketing Your App" section.

4. **Attend App Center Orientation**
   a. Our Partner Success team will send an invitation to the App Center Orientation meeting after a partner's app Certification is completed. Attendance is required before the partner app can go live in the App Center. The meeting is held on the 2nd and 4th Wednesday of each month at 9am PST, and partner team members can attend any time after the initial meeting to refresh their knowledge.
   b. Email concur_AppCenterAlliance@sap.com to receive an invitation to the orientation. **The partner's alliance, marketing, technical, and finance contacts should attend this meeting.**

5. **Pay Membership and App Center Listing Fees**
   a. In order for an integration to go-live in the App Center, partners must complete payment of their Membership and App Center listing fees. They will be invoiced for these fees about a week before go-live by concur_AppCenter_BillingInquiry@sap.com once they've completed the other certification items.

6. **Sync with Partner Success**
   a. After go-live, the partner's engagement with Business Development team will be concluded. The Partner Success team (concur_AppCenterAlliance@sap.com) will be the main point of contact moving forward, and they will reach out to the partner to discuss existing pipeline for their integration and other next steps.

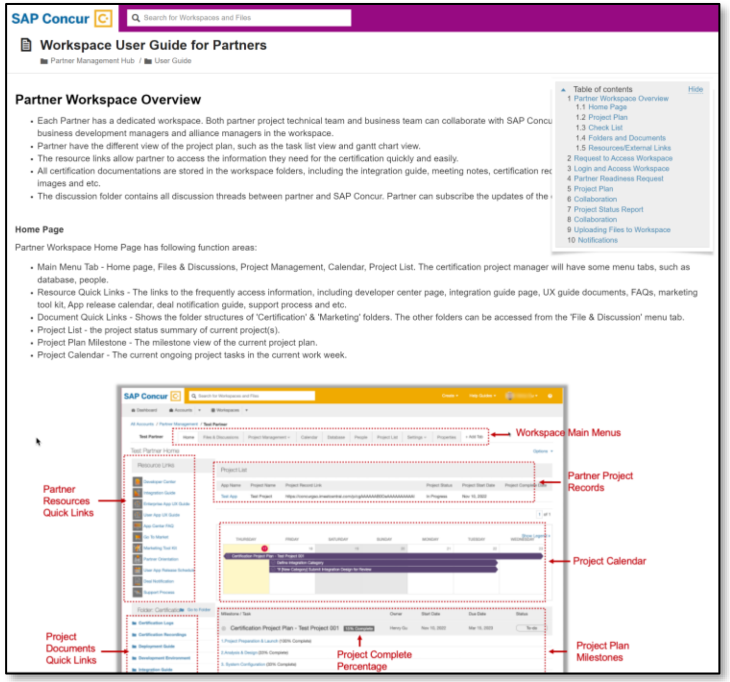
iMeet Central Workspace

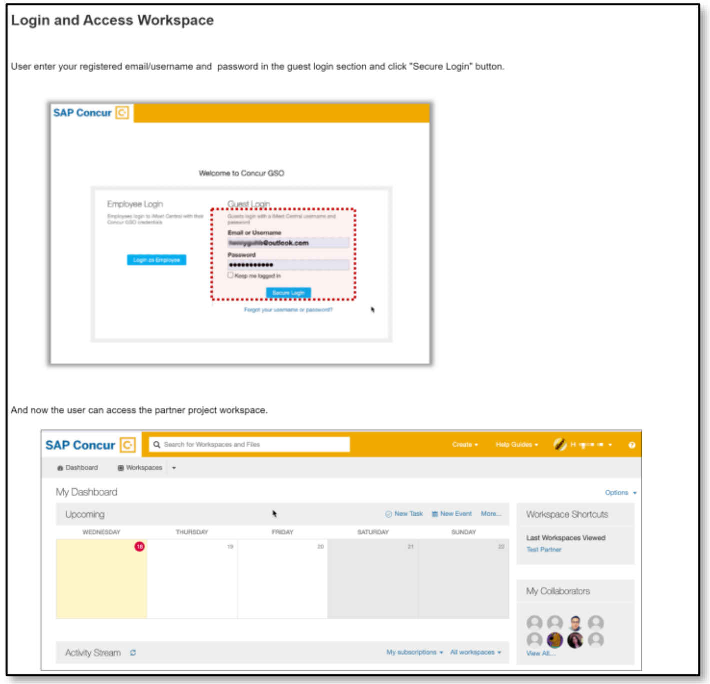
Each App Center partner is given an iMeet Central Workspace where they and the SAP Concur App Center team can:

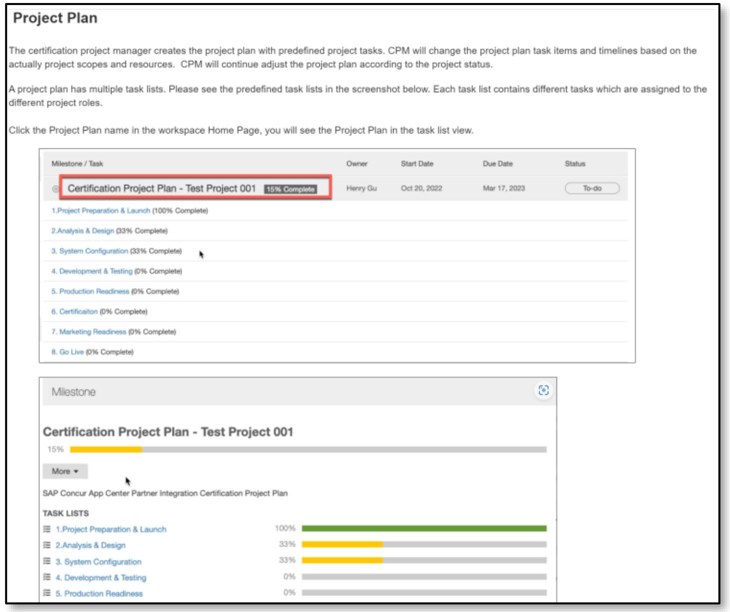
- Track and manage **project plans**
- Update the list of **partner contacts** that is to receive App Center updates
- Access technical and Go-to-Market **resources** (Marketing Toolkit, DNF, etc.)

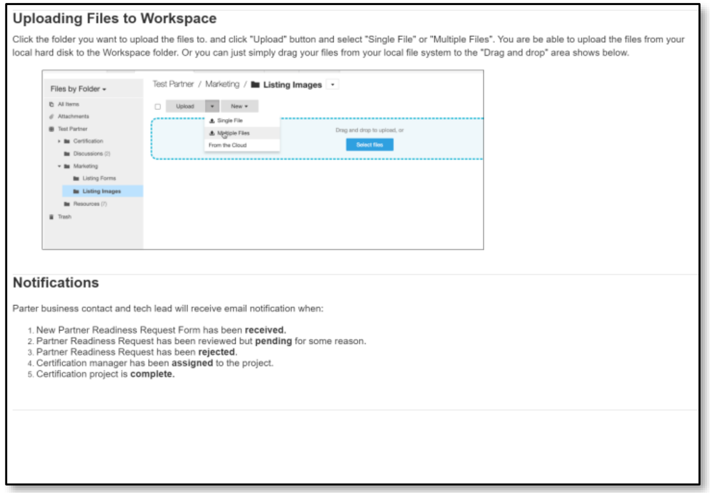
The Workspace [User Guide for Partners](#) is a resource that answers questions about:

- Navigating the Workspace
- Requesting access to the Workspace
- Logging in
- Submitting Partner Project Readiness requests
- Managing Project Plans
- Collaborating with the SAP Concur team







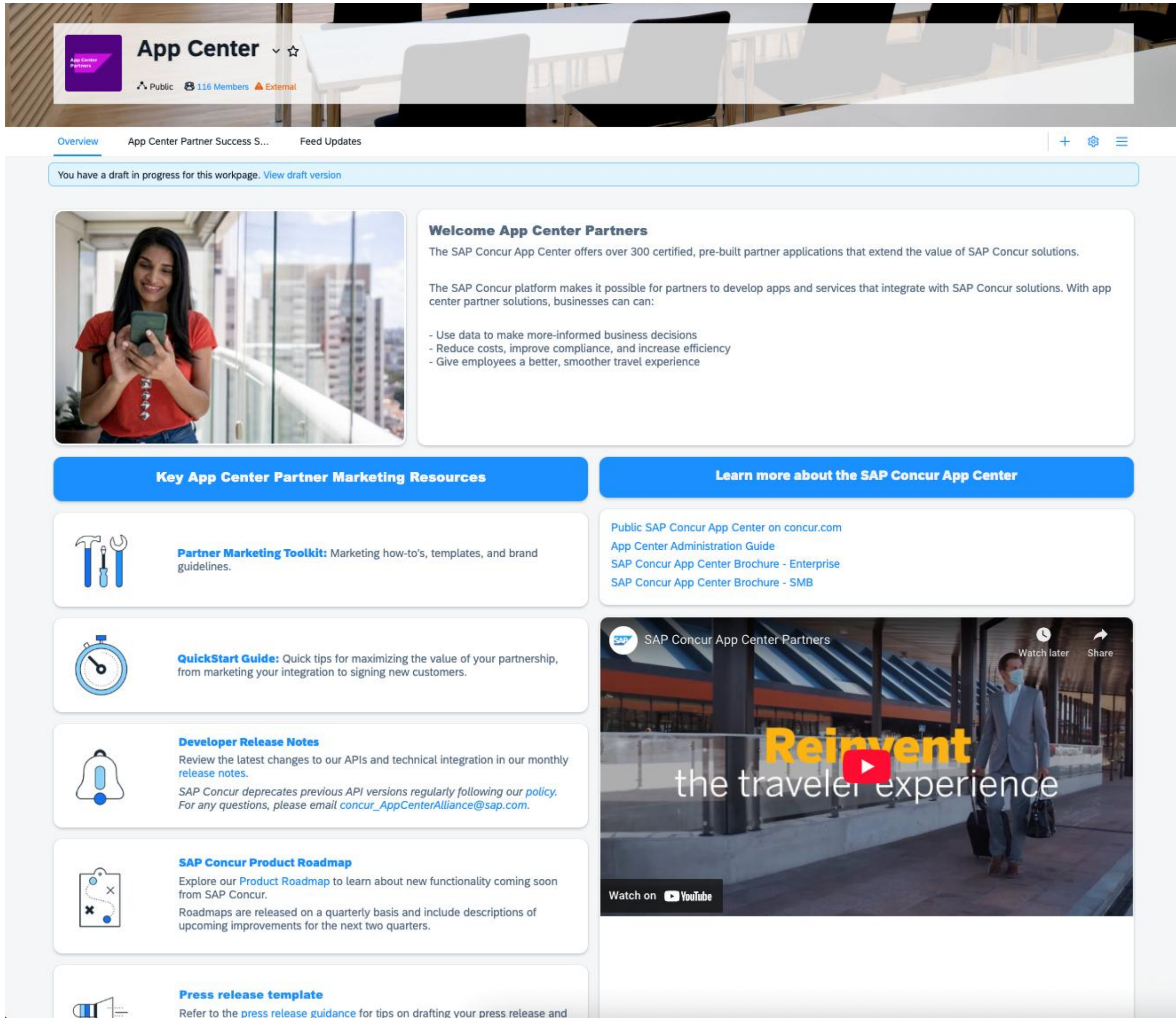


Partner Portal

The Partner Portal is a platform intended to provide partners with the key resources to manage their app center partnership.

At the time of onboarding, any partner contacts in our Salesforce records will receive an invitation to the Partner Portal.

After this, partner contacts can request access to the Partner Portal using the SAP Concur Partner Portal Access Request form.



Technical Enablement

App Certification

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

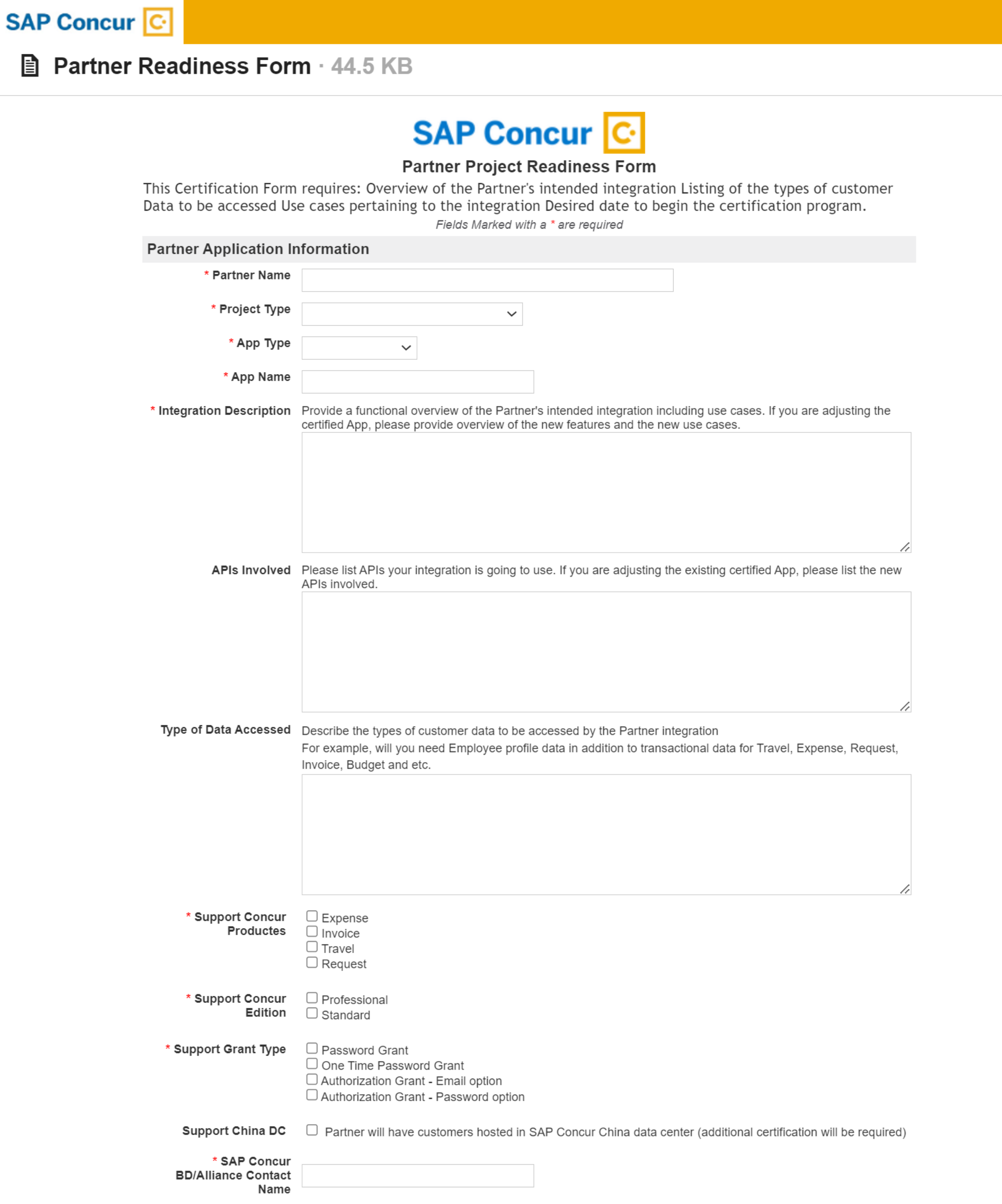
To certify an app, make changes to an app, or migrate to new APIs, the partner's technical team must complete the Partner Project Readiness Form.

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
5. Help the partner complete the listing form and build the production listing

The above will be documented via the project plan and checklist on the partner's iMeet Central Workspace.

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.


SAP Concur

Partner Readiness Form · 44.5 KB

SAP Concur

Partner Project Readiness Form

This Certification Form requires: Overview of the Partner's intended integration Listing of the types of customer Data to be accessed Use cases pertaining to the integration Desired date to begin the certification program.

*Fields Marked with a * are required*

Partner Application Information

* Partner Name

* Project Type

* App Type

* App Name

* Integration Description — Provide a functional overview of the Partner's intended integration including use cases. If you are adjusting the certified App, please provide overview of the new features and the new use cases.

APIs Involved — Please list APIs your integration is going to use. If you are adjusting the existing certified App, please list the new APIs involved.

Type of Data Accessed — Describe the types of customer data to be accessed by the Partner integration
For example, will you need Employee profile data in addition to transactional data for Travel, Expense, Request, Invoice, Budget and etc.

* Support Concur Productes — ☐ Expense ☐ Invoice ☐ Travel ☐ Request

* Support Concur Edition — ☐ Professional ☐ Standard

* Support Grant Type — ☐ Password Grant ☐ One Time Password Grant ☐ Authorization Grant - Email option ☐ Authorization Grant - Password option

Support China DC — ☐ Partner will have customers hosted in SAP Concur China data center (additional certification will be required)

* SAP Concur BD/Alliance Contact Name

Release Notes & API Updates

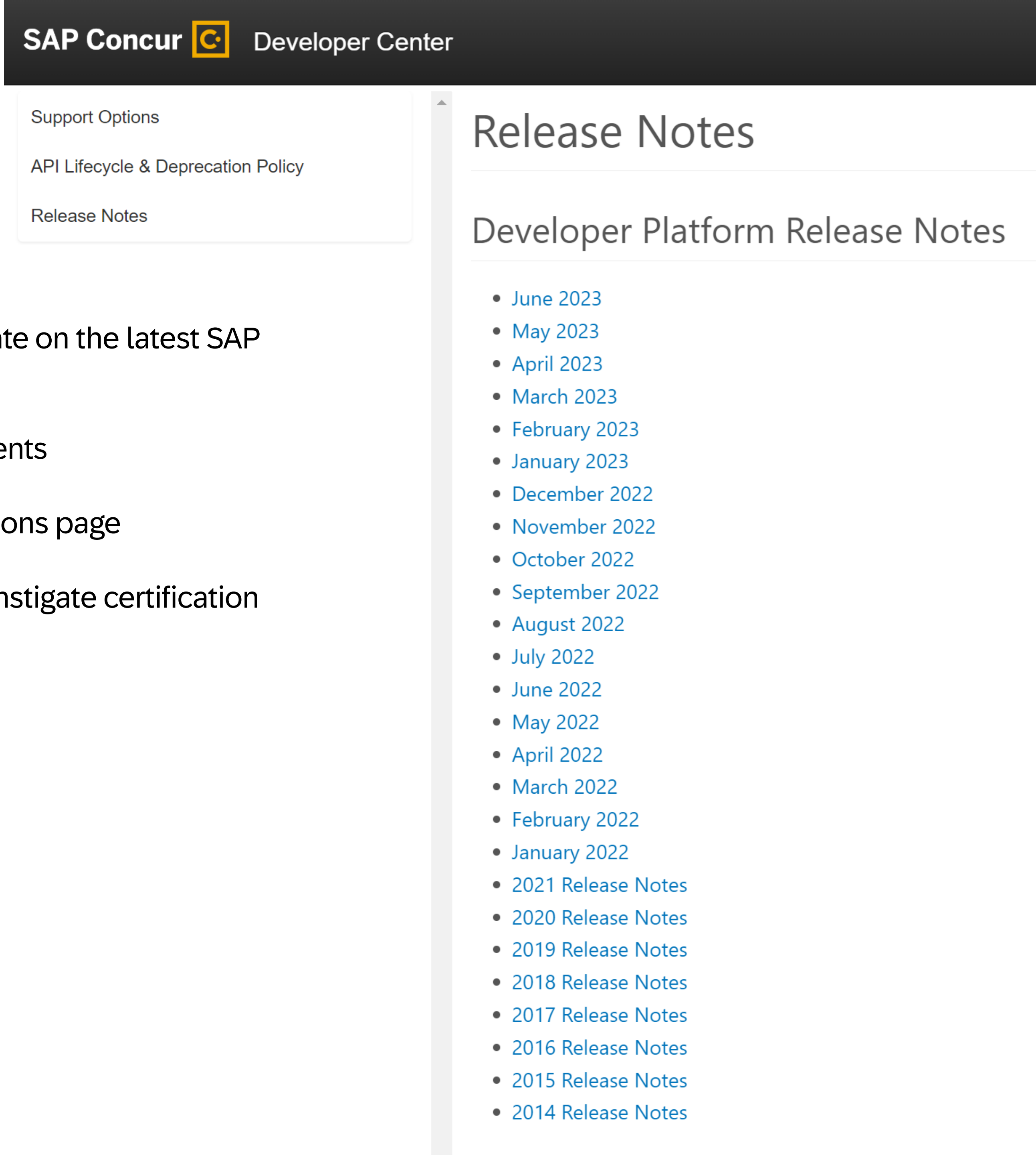
Partner technical teams are expected to keep their integration up-to-date on the latest SAP Concur API releases. To do this, technical contacts must:

1. Review the quarterly PartnerLINK Newsletter for API announcements

2. Access the Release Notes on the Developer Center Support Options page

3. Submit an App Expansion request form to our technical team to instigate certification for new APIs

4. Migrate customers to the most current 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") if the customer has purchased a Production Sandbox Entity
- More info can be found here: SAP Concur Developer Center | Testing App Center Partner Applications

Deploying 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 integration

If a partner has a new connector they would like to add to the App Center, they should engage with the Partner Success 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 App Center agrees to move forward:

1. Partner Success will 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

Building a Listing: App Center Partner Marketing Toolkit

The most effective way to promote a partner integration is to make concise, current, and compelling marketing content available in your listing and 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 is the home for documents and links to help partners with:

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

Recommended Marketing Content

Recommended partner content	Where content is surfaced
▪ Brochures (**required** for Enterprise applications) ▪ Landing page covering the integration (**required** for Enterprise Applications) ▪ Brief demo & video overviews ▪ Customer testimonials and case studies (submit via this form) ▪ Slides to integrate into sales presentations (template)	▪ Highspot (SAP employees only) ▪ App Center Work Zone group (SAP employees only) ▪ SAP Concur App Center listings ▪ Concur.com ▪ Your own website ▪ Google

During onboarding, the Technical Enablement team works with partners and our marketing colleagues to ensure you have essential, correctly-branded marketing pieces.

To edit or send additional marketing content, email the edited/new content to concur_AppCenterAlliance@sap.com and plan on a 10-day turnaround for the marketing content review process.

Sales

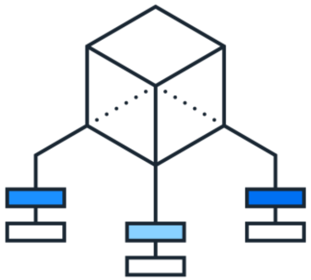
App Center Integration Customer Phases

Sales

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

Key Role

Account Executive (AE)
Net-new customers and existing customers



Solution Consulting

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

Key Role

Solutions Consultant (SC)

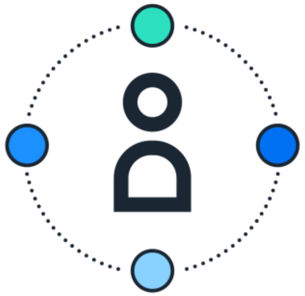
Implementation

Configures a customer'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



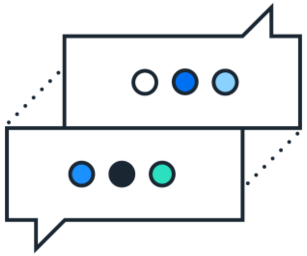
Customer Success

Accompanies customer with onboarding and Go-Live to promote retention, renewal, and ongoing optimization

Key Role

Customer Success Manager (CSM)
SMB

Customer Success Partner (CSP)
Enterprise



Support

The customer 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

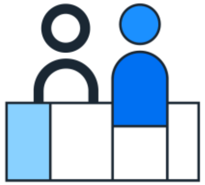
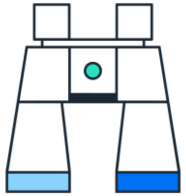
Key Resource

Support Portal

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

5 Business Outcomes for SMB

An **Outcome** is the **result** of an achieved customer goal that solves a business challenge. The **Goals** are set out to make **progress** toward achieving the outcome.

					
Business Outcomes	**Productivity**	**Employee Experience**	**Market Adaptability**	**Visibility**	**Minimize Financial Risks**
Goals	• Time savings • Minimize human effort • Reduce costs	• Attract and retain talent • Flexible software access • Work smarter	• Manage market and economic shifts • Achieve business health and continuity • Flexible software solutions	• Aligned insights • Gauge spend health • Business agility	• Dynamic policy controls • Spend oversight • Minimize financial risks
Client Success Goals	• Time savings • Minimize human effort • Accessibility	• Mobility • Visibility into reimbursement • Connected apps and modules	• Access anywhere • Localization • One platform	• Share insights • Gauge spend health • Sustainability	• Spend compliance • Oversight/Accountability • Policy enforcement

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

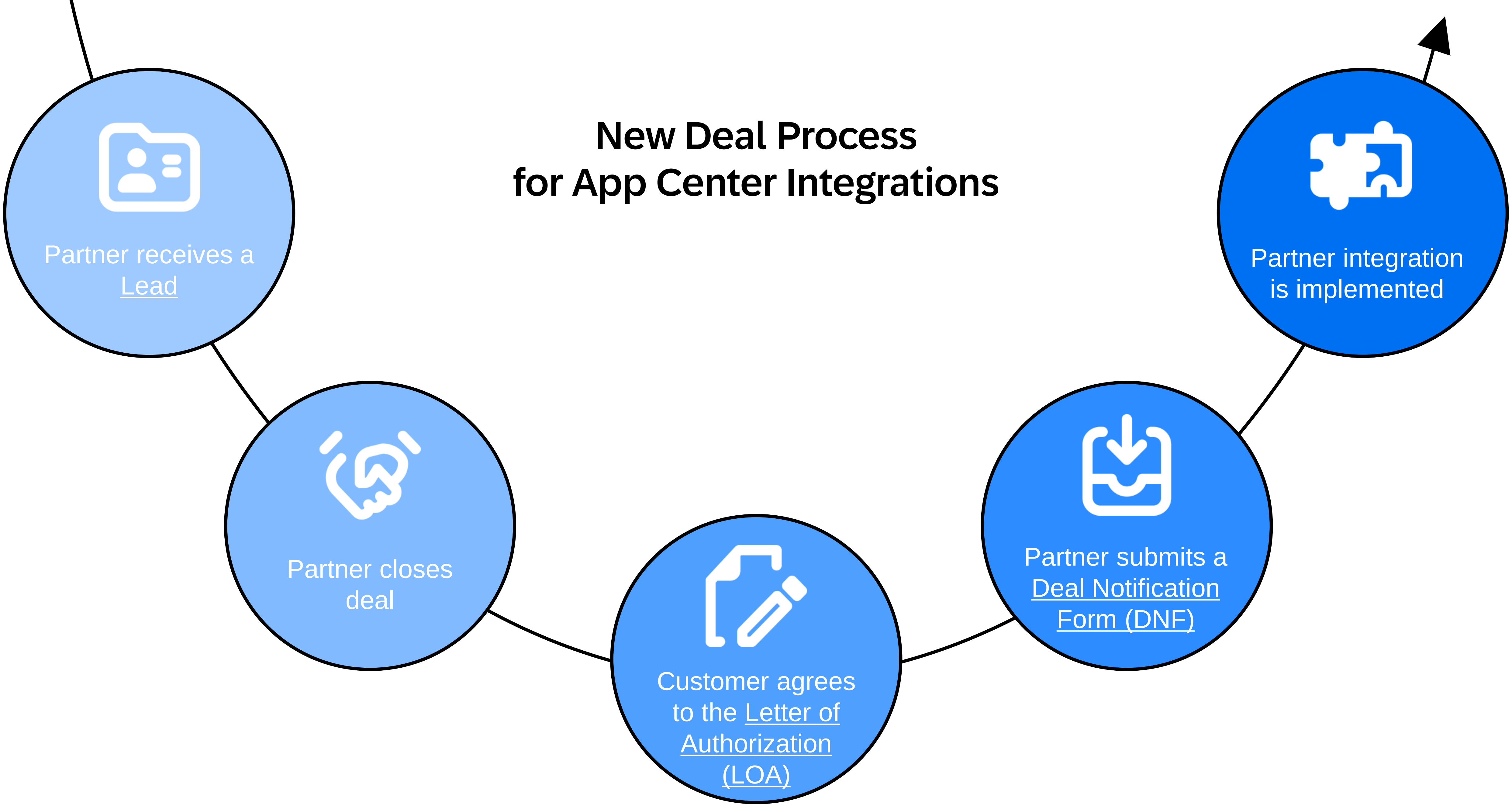
For an in-depth dive into SAP Concur sales organization, review the App Center Partner Sales Strategy Guide.

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 Partner Success to post your content in our field enablement tools: Highspot and Work Zone
- 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 customers they manage that would benefit from your offering beyond leads you've received from them

Operations

New Deal Process
for App Center Integrations



Who submits App Center leads to partners?

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

Sales Reps

- Manually submit leads through Salesforce.
- The next slide (App Center Lead Submission Process) details instructions for SAP Concur distribution teams. Partners should include the slide in presentation decks for meetings with SAP Concur sales teams.

Customers and Prospects

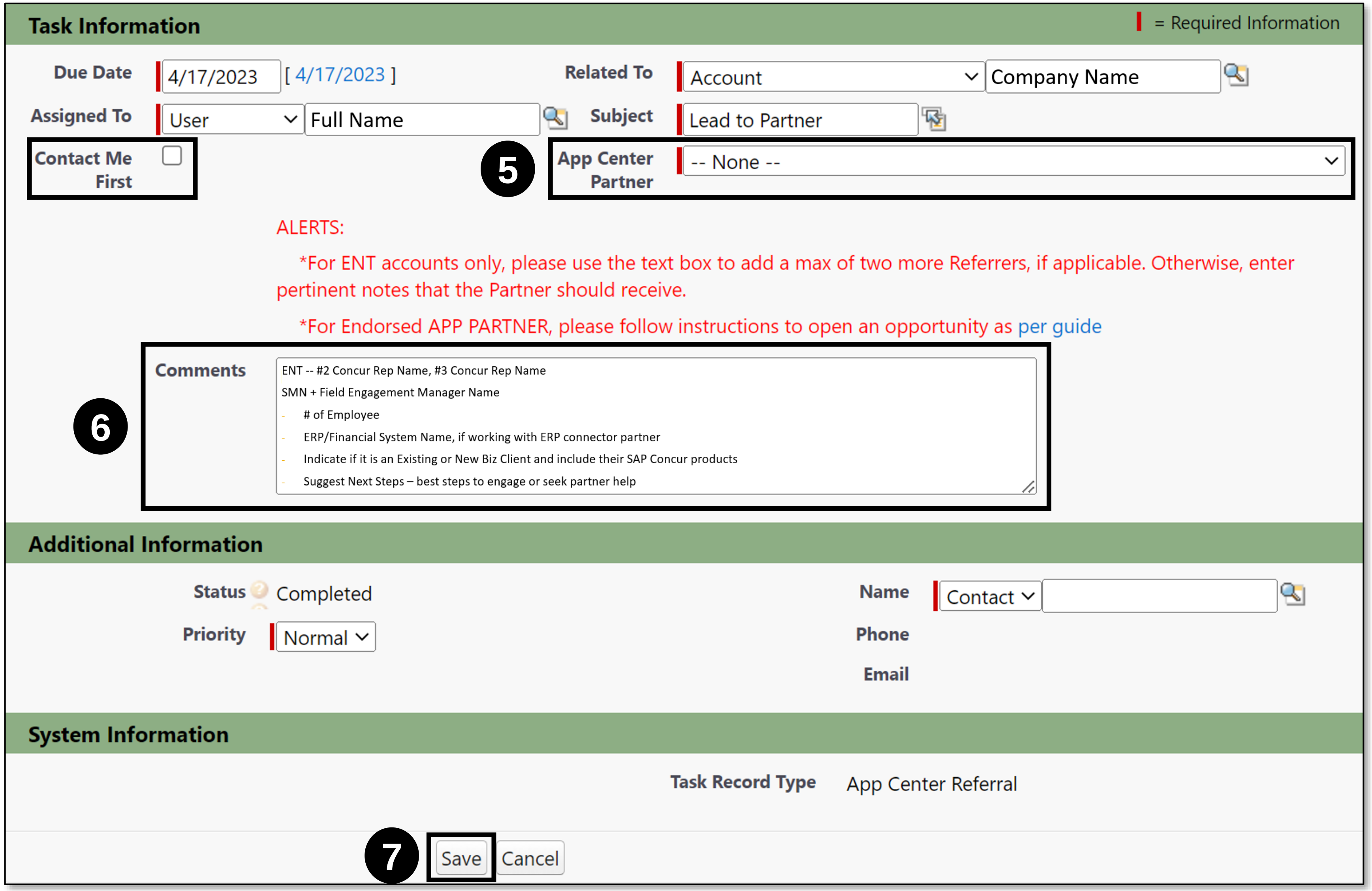
- Submit leads by clicking the **Request More Information** link on the partner's App Center listing.

Review details of the lead submission process for SAP Concur distribution teams and customers in more detail 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 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

SAP Concur, 601 108th Ave NE, Suite 1000 Bellevue, WA 98004
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We respect your privacy. Please review our Privacy Policy for more information.
Unsubscribe | Privacy Policy

From SAP Concur Customer/Prospect

What happens after a partner receives a lead?

1. If the lead was submitted by a sales rep, both the partner and the sales rep who submitted the lead will receive the Lead Form email.
   - Note: If a customer submits a lead, the partner will be responsible for reaching out to the customer.

2. The partner accepts or rejects the lead.
   - A lead is considered accepted if the partner doesn't email concur_PartnerClientActivation@sap.com within 10 days. The partner has 10 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:
     i. The prospect is already an existing customer.
     ii. The prospect is already in possession of a current proposal from the partner for an integration or other service.
     iii. The partner has been in material discussions with the prospect regarding another service in the past 6 months.
     iv. It is a duplicate lead: someone already sent a lead for this customer, or the same rep submitted it twice by accident.

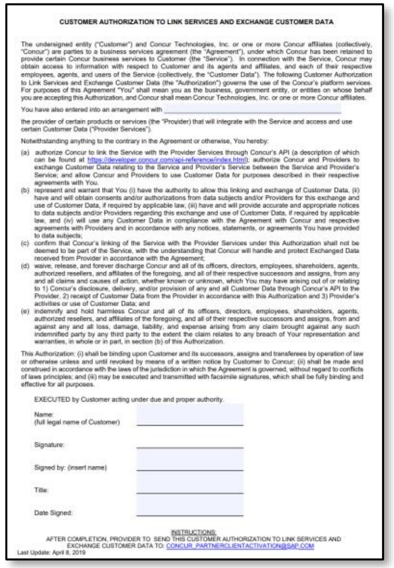
Letter of Authorization (LOA)

To connect to a partner integration in the App Center, customers must agree to the terms and conditions in the **Letter of Authorization (LOA)**, a mandatory legal document that authorizes SAP Concur to securely share their data with App Center partners.

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

- Customers electronically sign the eLOA by accepting the Terms & Conditions accessed via the **Connect** button in the partners' App Center listing(s).
- After accepting, customers will be taken to the partner's landing page and 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](#).



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: ______________________

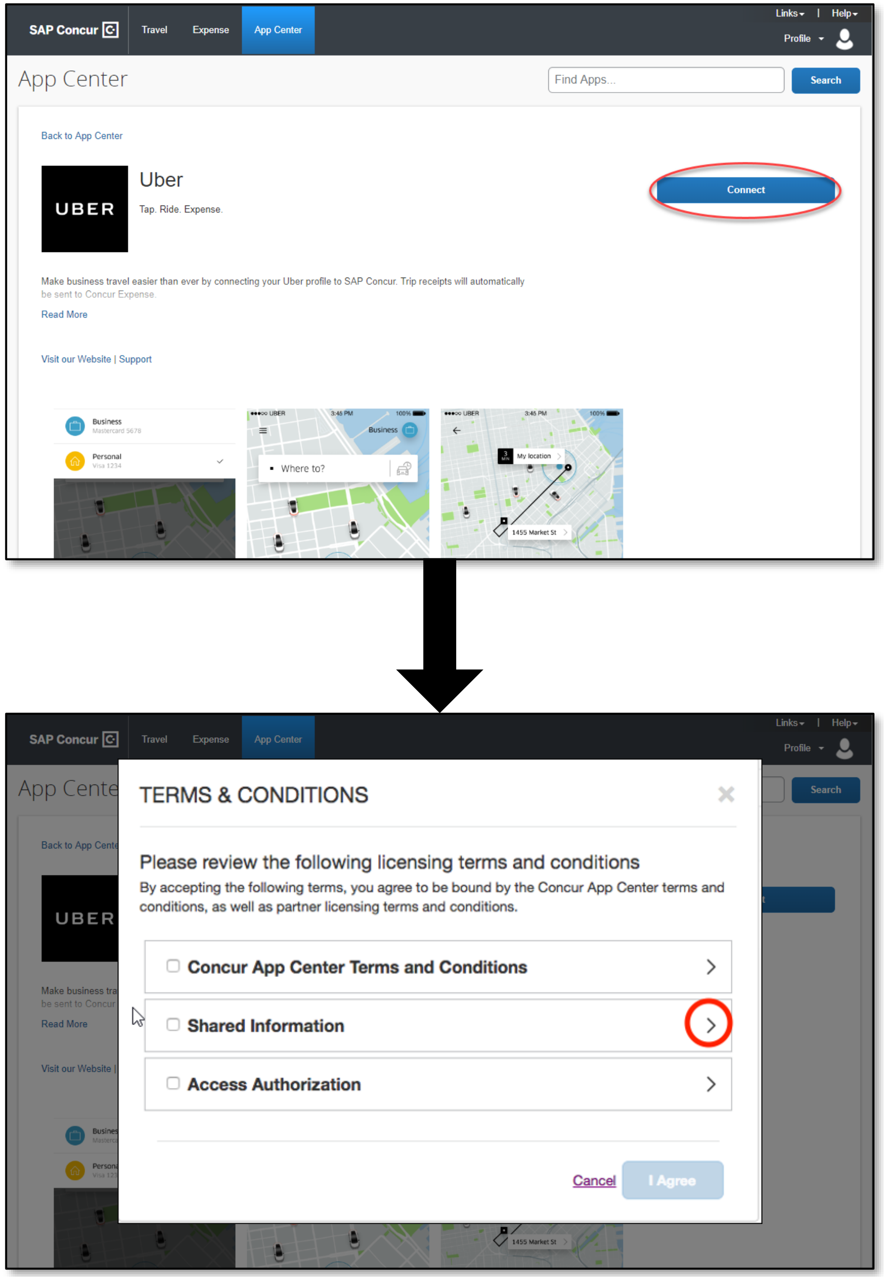
Signed by: (insert name) ______________________

Title: ______________________

Date Signed: ______________________

INSTRUCTIONS:
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

If customers have questions about the LOA, partners can send them the [Letter of Authorization FAQ](#).



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 Partner Success team will consult the SAP Concur legal team to review requested changes and provide a response to the partner.
   a. **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

Partners can access the DNF on the Go To Market page.

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 a partner is unsure if their integration is Concur- or Partner-led, they can reach out to concur_PartnerClientActivation@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

App Center Partner Integration Implementation

To deploy an integration for a joint customer, App Center partners will follow one of two types of implementation: Partner-Led implementation and Concur-Led implementation. If they are unsure if their integration is Concur- or Partner-led, they can reach out to concur_PartnerClientActivation@sap.com.

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 independently guide and assist the customer in implementation. The majority of App Center implementations have this kind implementations.

An integration that is Partner-Led does not require any custom configurations for the customer's Concur instances.

The process for Partner-Led implementations is as follows:

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. After SAP Concur creates an implementation project, both SAP Concur and the partner assist the customer in implementation.

Integrations require Concur-Led implementation if there is any configuration required in the customer's instance of Travel, Expense, or Invoice, such as:

- Adding custom fields on forms
- Adjusting workflows
- enabling FIS

The process for Concur-Led implementations is as follows:

1. Partner signs a deal with a customer
2. Partner fills out a Deal Notification Form (DNF)
    - Partner includes the contact information for the customer's implementation/tech resource
3. SAP Concur creates a project and assigns a Project Manager
4. Once assigned, the SAP Concur Project Manager reaches out to the partner and customer to assist with deployment (within 4 to 6 weeks)
5. 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 a partner service, they partner should 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.

Partners 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 Partner Integration *
For ERP partners, please indicate the specific ERP being cancelled (i.e. Quickbooks or Intacct)

Cancellation Date *

Reason for Cancellation *
Select

Additional Detail *
Please provide additional detail as to why the customer cancelled the product

Send me a copy of my responses

Submit

Fees and Invoicing

Membership & App Listing Fees

- Prior to a partner app being listed in the App Center, the initial Membership and/or App Listing Fees must be paid in full.
- For questions regarding fees, contact concur_PartnerClientActivation@sap.com.

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) 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 concur_AppCenter_BillingInquiry@sap.com.

SAP Concur

ERP Connector Requirements Form

For ERP Connector Partners only

To assist SAP Concur implementation with the configuration of a new customer's instance, **ERP connector partners** must submit an ERP Connector Requirements Form. See the description in the yellow box.

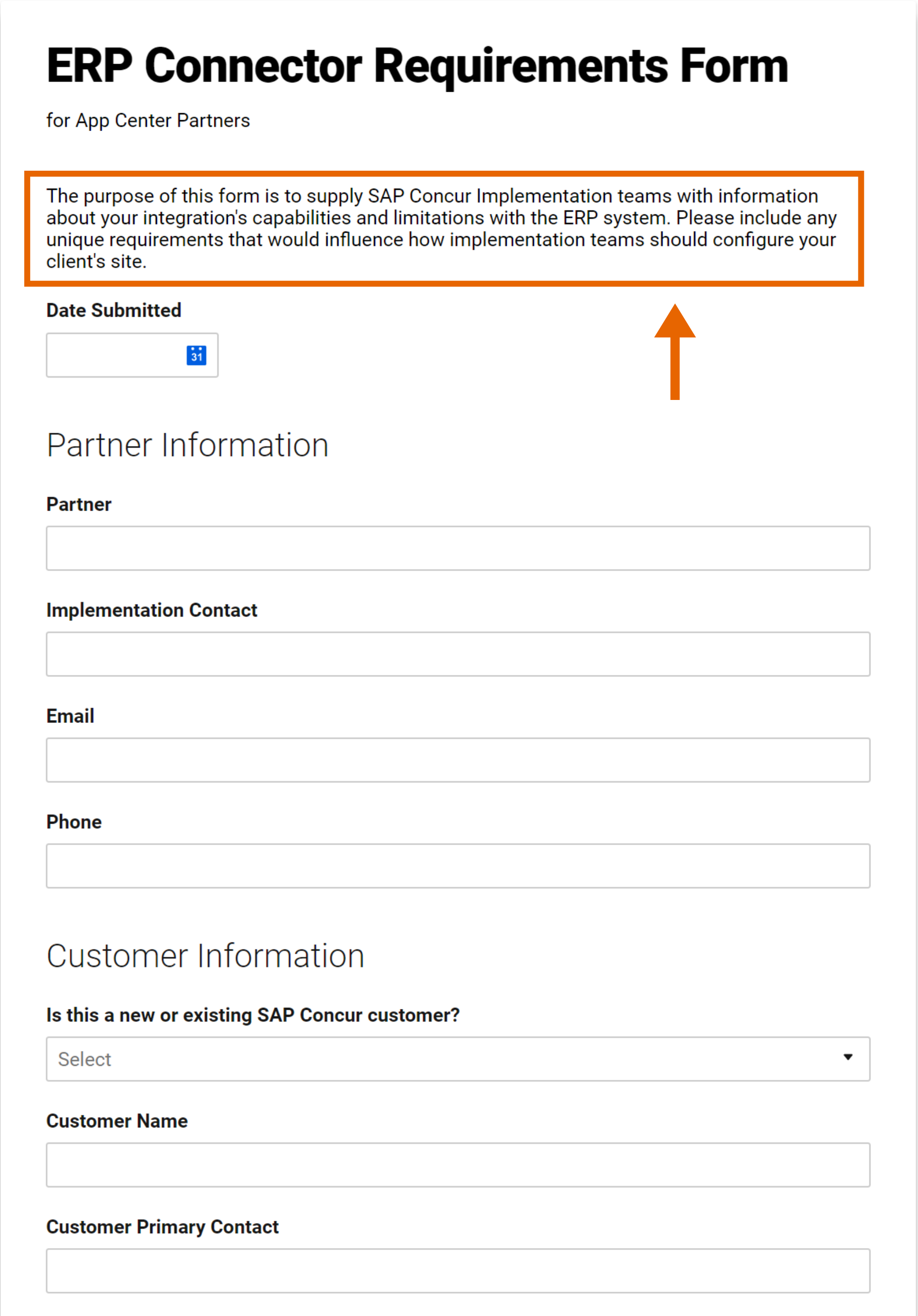
The partner should submit the requirements form as early as possible after a new customer purchases an ERP integration.

- **Note:** It's okay if a partner doesn't know or have all of the information yet. The primary purpose of the form is for SAP Concur implementation to be made aware that there is an ERP connector partner involved in the new customer's instance. Additional information can be provided later.

To adopt the App Center **ERP Connector Requirements Form** process:

- ERP Connect partners should submit this form for every customer they sign, and include any unique instructions for the implementation. Once received, our Operations team will attach it to:
  - The customer's Salesforce Customer Account
  - The customer's Expense and/or Invoice implementation project

Once the integration project is underway and a go-live date is secured, the partner must 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

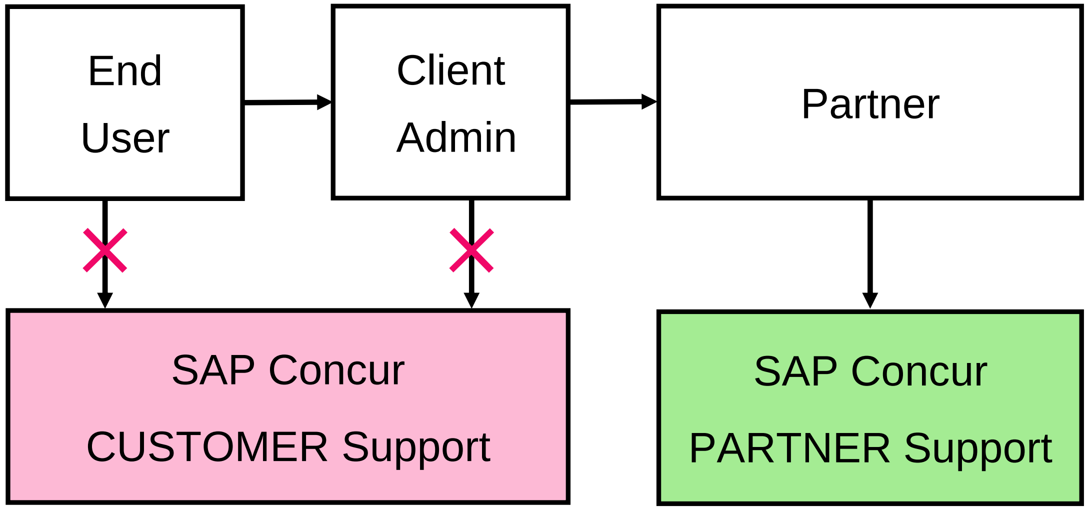
Support

App Center Integration Support Process

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

Partners are the first line of support for App Center integration issues. They are responsible for:

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



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

Partners should [submit a support case]() to SAP Concur through the partner support portal if:

- They are unable to resolve the customer issue
- If they determine the error will require an SAP Concur resource

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 partner integration, but has something to do with the SAP Concur functionality, the **PARTNER** should submit a case.

The CUSTOMER should submit a case if:

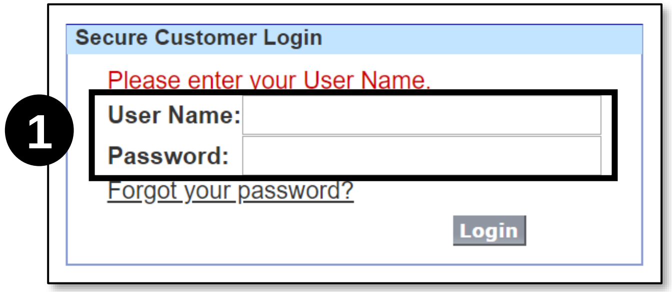
- There is a glitch in their SAP Concur instance
- An SAP Concur report is not pulling correctly, but all is correct on the partner side

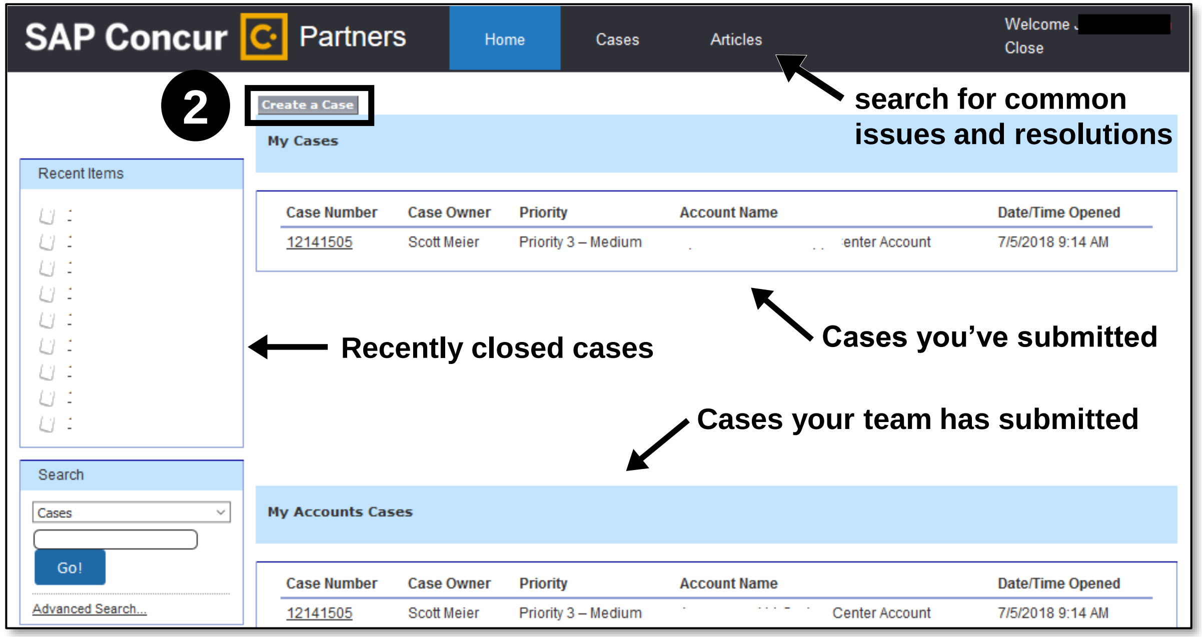
The PARTNER should submit the case if:

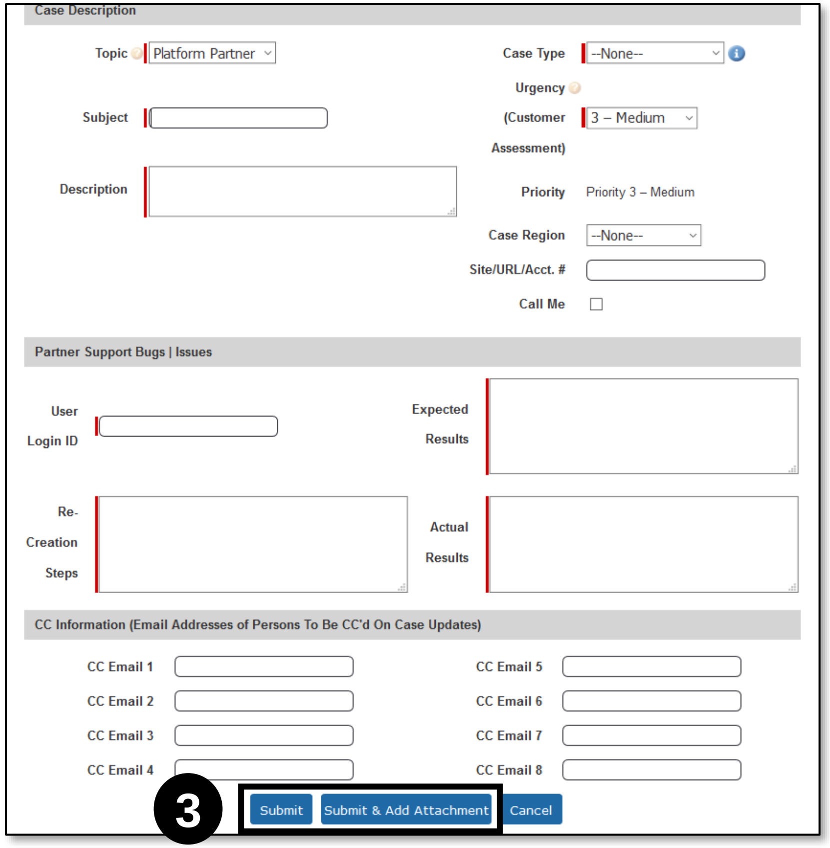
- A customer is receiving an error from the partner's callouts
- Partner data is not populating correctly to the connector

How to log a Partner Support Case

1. Access the [Partner Support login page](#).
    a. If a partner contact needs support credentials, they should email concur_AppCenterAlliance@sap.com.
2. Once on the Partner Support Portal, click the **Create a Case** button.
3. Fill out the Case Description and click **Submit** or **Submit & Add Attachment**.
4. Once submitted, an SAP Concur resource will be assigned to address the customer issue.







How to escalate a Partner Support Case

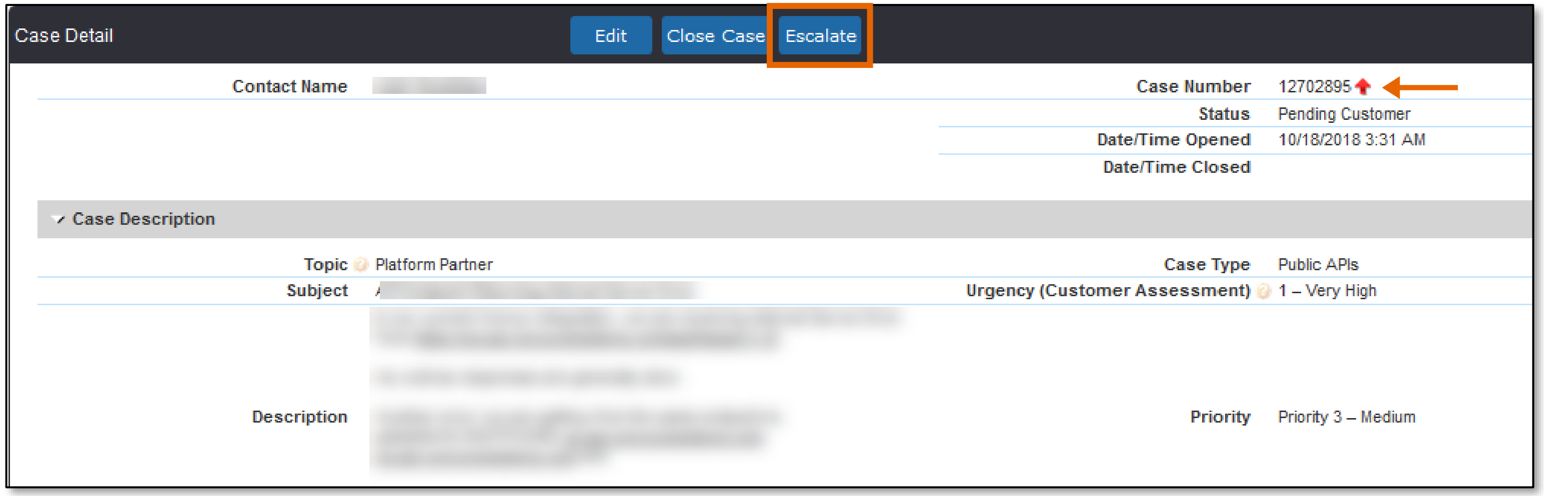
Once a case has been submitted, it will appear in the My Cases section of the Partner Support Portal.

If a partner support case is 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

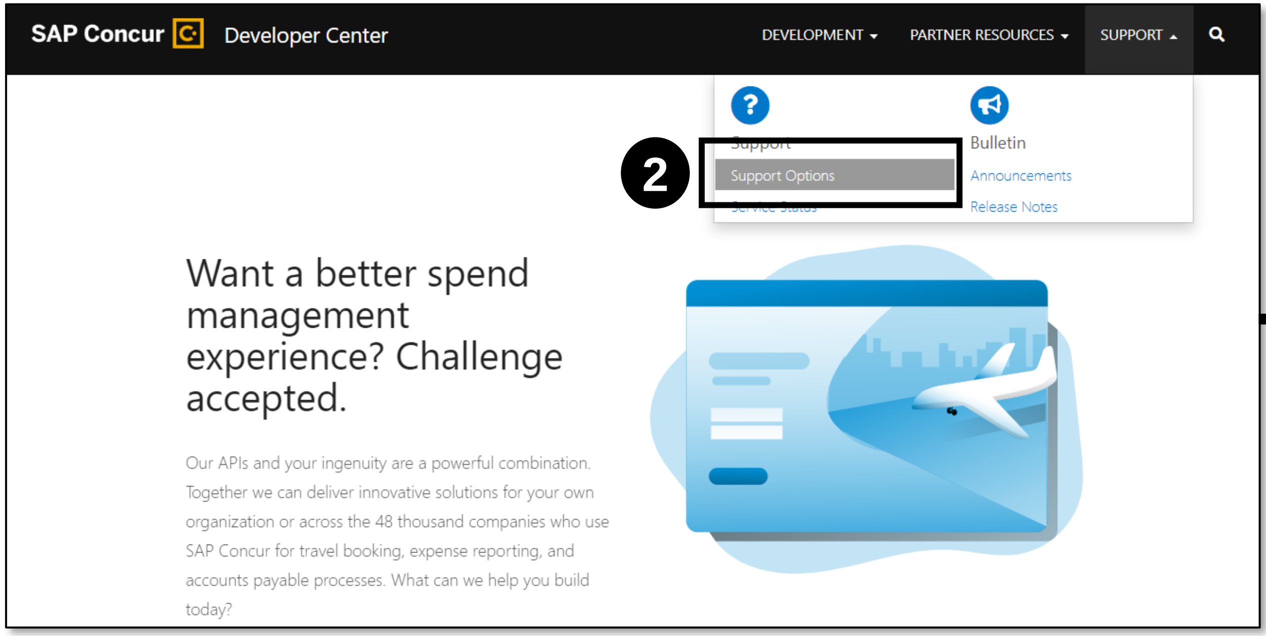
If a partner is for whatever reason unable to get in touch with the support resource assigned to the case, they should reach out to SAPConcurPartnerSupport@sap.com and CC concur_AppCenterAlliance@sap.com.

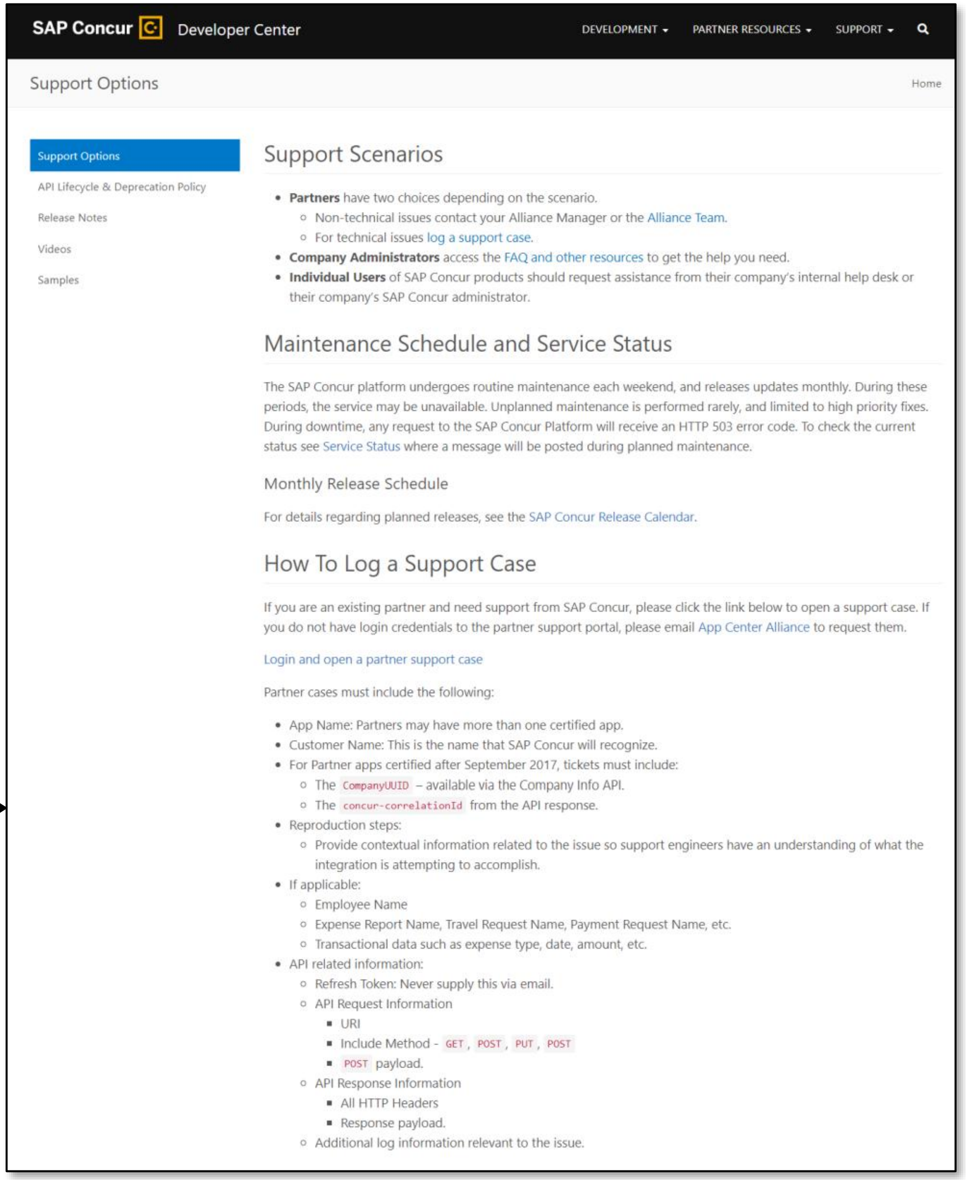


Navigating Support Options

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 Support Options

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

- The **Service Status Dashboard** allows partners to review scheduled maintenance to understand when and why there will be outages that affect a partner's integrations and customers.
    - To receive notification regarding this schedule, log in and click **Subscribe to Updates.**
    - If a partner subscribes to updates, they will receive a **Root Cause Analysis (RCA)** for service outages.
- The **Release Calendar** allows partners to see when SAP Concur releases occurred. Specific modifications can be viewed in the **Release Notes**.