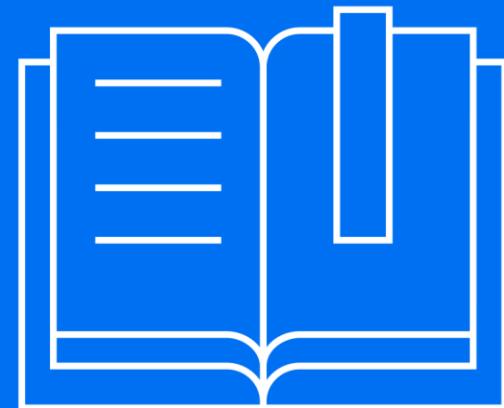


# App Center Partner Guidebook



# 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](mailto:concur_AppCenterAlliance@sap.com).



Partner Onboarding



Technical Enablement



Marketing



Sales



Operations



Support

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[Deal Notification Form \(DNF\)](#)  
[DNF: Revenue Share and Implementation](#)  
[Partner-Led vs. Concur-Led Implementation](#)  
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## Support

[Support Process](#)  
[Who should submit the Support Case?](#)  
[Customer vs. Partner](#)  
[How to log a Partner Support Case](#)  
[How to escalate a Partner Support Case](#)  
[Navigating Support Options](#)



## App Center Aliases

Partner Success	<a href="mailto:concur_AppCenterAlliance@sap.com">concur_AppCenterAlliance@sap.com</a>
Marketing	<a href="mailto:concur_AppCenterMarketing@sap.com">concur_AppCenterMarketing@sap.com</a>
Operations	<a href="mailto:concur_PartnerClientActivation@sap.com">concur_PartnerClientActivation@sap.com</a>
Billing	<a href="mailto:concur_AppCenter_BillingInquiry@sap.com">concur_AppCenter_BillingInquiry@sap.com</a>
Support	<a href="mailto:SAPConcurPartnerSupport@sap.com">SAPConcurPartnerSupport@sap.com</a>

## Links

[SAP Concur Developer Center](#)  
[Go To Market Resources](#)  
[SAP Concur Global Learning Services Training Toolkit](#)

# Quick Reference

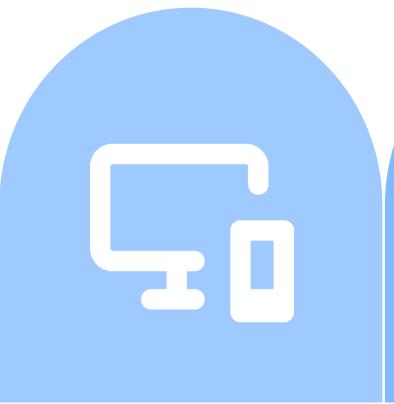
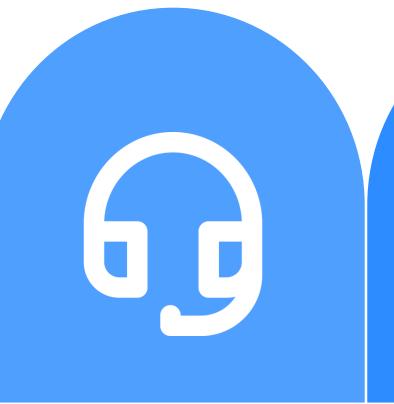
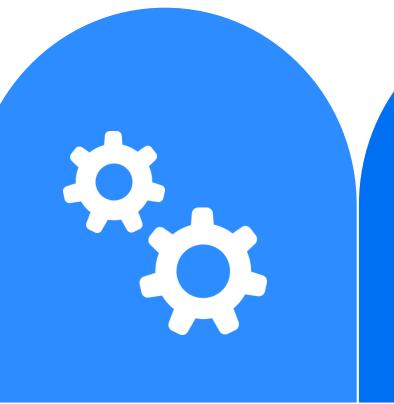
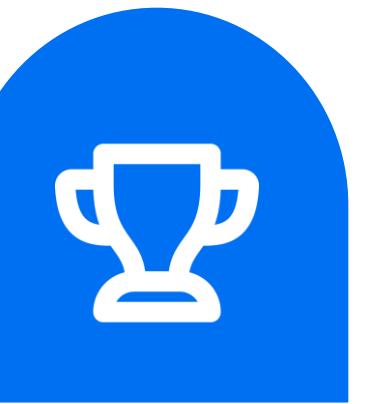


# Best Practices for App Center Success



1. Upon go-live, work with your Partner Success manager ([concur\\_AppCenterAlliance@sap.com](mailto: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](#) and work with [concur\\_AppCenterMarketing@sap.com](mailto:concur_AppCenterMarketing@sap.com) to create the recommended Marketing content pieces
  - Update them and your App Center listing annually – newer content is more visible to our field and pushes awareness within SAP Concur
5. Utilize the [iMeet Central Workspace](#) 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](mailto: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 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](mailto:concur_AppCenterMarketing@sap.com)

# Partner Tasks by App Center Team

					
Business Development	Technical Enablement	Marketing	Sales	Operations	Partner Success
<ul style="list-style-type: none"> <li><a href="#">Hand-off from Business Development to Partner Success</a></li> <li><a href="#">Add new App Center integration(s)</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Certify partner integrations</a></li> <li><a href="#">Make integration modifications</a></li> <li><a href="#">Get support for integration and customer technical issues</a></li> <li><a href="#">Access the partner sandbox</a></li> <li><a href="#">Testing a customer's integration</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Add new partner integration marketing materials</a></li> <li><a href="#">Modify partner listings</a></li> <li><a href="#">Sponsor events</a></li> <li><a href="#">Customer Testimonials</a></li> <li><a href="#">Subscribe to the Partner Insights Newsletter</a></li> <li><a href="#">Receive an invite to the App Center Partner Orientation</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Connect with sales teams about a partner integration</a></li> <li><a href="#">Get introduced to a customer's SAP Concur account team</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">New Deal Process</a></li> <li><a href="#">Letter of Authorization (LOA)</a></li> <li><a href="#">ERP Connector Requirements Form</a></li> <li><a href="#">Deal Notification Form (DNF)</a></li> <li><a href="#">Cancellations</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Ask general partnership questions</a></li> <li><a href="#">Coordinate business reviews</a></li> <li><a href="#">Get reporting</a></li> <li><a href="#">Review contract terms</a></li> <li><a href="#">Expand integration functionality</a></li> <li><a href="#">Request LOA modifications</a></li> </ul>
<a href="#">Contact Partner Success</a>	<a href="#">Contact Partner Success</a>	<a href="#">Contact Marketing</a>	<a href="#">Contact Partner Success</a>	<a href="#">Contact Operations</a> <a href="#">Contact App Center Billing</a>	<a href="#">Contact Partner Success</a>

# 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 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](http://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

The screenshot shows the SAP Concur App Center homepage. At the top, there's a navigation bar with links for SAP Concur (with a logo), PRODUCTS, SOLUTIONS, ABOUT US, and RESOURCES. To the right are buttons for 'Try for free', 'Login', a search bar, and the SAP logo. Below the navigation is a section titled 'App Center' with a search bar and filters for 'Category', 'Works with Products', 'Countries Available', and 'Regions Available'. There are also checkboxes for 'Show newly released apps' and 'Popular User Connections'. A sub-section titled 'Enterprise Applications' shows pre-built business solutions integrated with SAP Concur products like MedPro Connect, International SOS, and Uber for Business. Another section, 'All User Connections', displays various travel and expense management apps such as Green Tomato Cars, Ordit, Panera Catering, Ola Cabs, Meituan Solutions, and Xerox Connect App. The overall layout is clean and organized, designed to facilitate discovery of travel and expense management tools.

# 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. Engage with Marketing**

- a. The App Center Marketing team ([concur\\_AppCenterMarketing@sap.com](mailto: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.
- b. Visit the [Go-to-Market page](#) with a special focus on the "Marketing Your App" section.

**4. Attend App Center Orientation**

- a. Our Marketing 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 2<sup>nd</sup> and 4<sup>th</sup> 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\\_AppCenterMarketing@sap.com](mailto:concur_AppCenterMarketing@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](mailto: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](mailto: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

SAP Concur Search for Workspaces and Files

Workspace User Guide for Partners

Partner Management Hub / User Guide

**Partner Workspace Overview**

Each Partner has a dedicated workspace. Both partner project technical team and business team can collaborate with SAP Concur business development managers and alliance managers in the workspace.

Partner have the different view of the project plan, such as the task list view and gantt chart view.

The resource links allow partner to access the information they need for the certification quickly and easily.

All certification documents are stored in the workspace folders, including the integration guide, meeting notes, certification requirements, images and etc.

The discussion folder contains all discussion threads between partner and SAP Concur. Partner can subscribe the updates of the discussion folder.

**Home Page**

Partner Workspace Home Page has following function areas:

- Main Menu Tab - Home page, Files & Discussion, Project Management, Calendar, Project List. The certification project manager will have some menu tabs, such as database, people, Resource Quick Links - The links to frequently access information, including developer center page, integration guide page, UX guide documents, FAQs, marketing tool kit, App release calendar, deal notification guide, support process and etc.
- Document Quick Links - Shows the folder structures of 'Certification' & 'Marketing' folders. The other folders can be accessed from the 'File & Discussion' menu tab.
- Project List - The project status summary of current project(s).
- Project Plan Milestone - The milestone view of the current project plan.
- Project Calendar - The current ongoing project tasks in the current work week.

Workspace Main Menus

Partner Resources Quick Links

Project List

Project Calendar

Project Documents Quick Links

Project Plan Milestones

Project Complete Percentage

Login and Access Workspace

User enter your registered email/username and password in the guest login section and click "Secure Login" button.

SAP Concur Welcome to Concur GSO

Employee Login Employee login to interact with data Concur GSO maintains

Email or Username HenryGu@outlook.com

Password

Forgot your username or password?

Login as Employee

My Dashboard

Upcoming

Activity Stream

My Collaborators

Project Plan

The certification project manager creates the project plan with predefined project tasks. CPM will change the project plan task items and timelines based on the actual project scopes and resources. CPM will continue adjust the project plan according to the project status.

A project plan has multiple task lists. Please see the predefined task lists in the screenshot below. Each task list contains different tasks which are assigned to the different project roles.

Click the Project Plan name in the workspace Home Page, you will see the Project Plan in the task list view.

Milestone / Task	Owner	Start Date	Due Date	Status
Certification Project Plan - Test Project 001 [100% Complete]	Henry Gu	Oct 20, 2022	Mar 17, 2023	To-do
1. Project Preparation & Launch (100% Complete)				
2. Analysis & Design (33% Complete)				
3. System Configuration (33% Complete)				
4. Development & Testing (6% Complete)				
5. Production Readiness (6% Complete)				
6. Certification (6% Complete)				
7. Marketing Readiness (6% Complete)				
8. Go Live (6% Complete)				

Milestone

Certification Project Plan - Test Project 001

15%

More

SAP Concur App Center Integration Certification Project Plan

TASK LISTS

Task	Progress
1. Project Preparation & Launch	100%
2. Analysis & Design	33%
3. System Configuration	33%
4. Development & Testing	0%
5. Production Readiness	0%

Uploading Files to Workspace

Click the folder you want to upload the files to, and click "Upload" button and select "Single File" or "Multiple Files". You are able to upload the files from your local hard disk to the Workspace folder. Or you can just simply drag your files from your local file system to the "Drag and drop" area shows below.

Files by Folder

- All Items
- Applications
- Test Partner
- Certification
- Marketing
- Listing Forms
- Listing Images
- Resources
- Test

Test Partner / Marketing / Listing Images

Upload New Single File From the Cloud Select File

Notifications

Partner business contact and tech lead will receive email notification when:

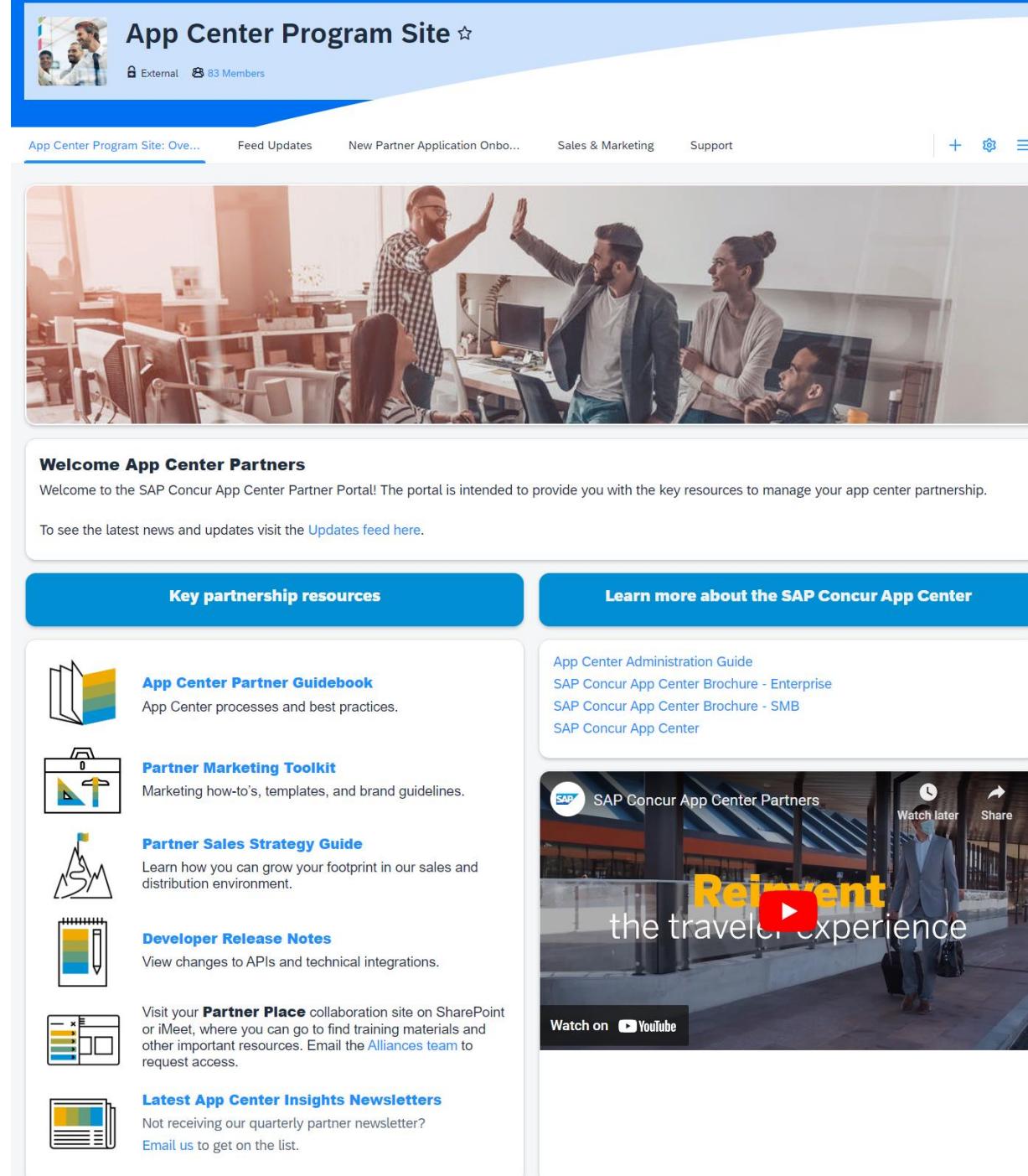
1. New Partner Readiness Request Form has been received.
2. Partner Readiness Request has been reviewed and pending for some reason.
3. Partner Readiness Request has been rejected.
4. Certification manager has been assigned to the project.
5. Certification project is complete.

# 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.



The screenshot shows a Facebook-like page titled "App Center Program Site". The header includes a profile picture of two people, the title "App Center Program Site", and a member count of "83 Members". Below the header, there are tabs for "Feed Updates", "New Partner Application Onbo...", "Sales & Marketing", and "Support". A large banner image shows several people in an office environment. The main content area has a heading "Welcome App Center Partners" followed by a brief welcome message. Below this, a link to "Updates feed here". Two main sections are visible: "Key partnership resources" and "Learn more about the SAP Concur App Center". The "Key partnership resources" section contains links to "App Center Partner Guidebook", "Partner Marketing Toolkit", "Partner Sales Strategy Guide", "Developer Release Notes", and "Latest App Center Insights Newsletters". The "Learn more about the SAP Concur App Center" section contains links to "App Center Administration Guide", "SAP Concur App Center Brochure - Enterprise", "SAP Concur App Center Brochure - SMB", and "SAP Concur App Center". At the bottom, there is a video thumbnail for "SAP Concur App Center Partners" with the text "Reinvent the travel experience" and a "Watch on YouTube" button.

# EMEA Partners: Opt In to App Center Updates

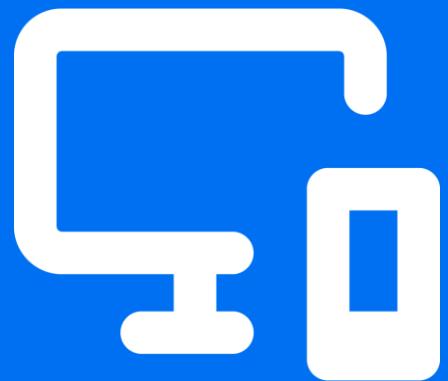
SAP Concur must comply with GDPR to send marketing communications to partners, including:

- 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](#).

The screenshot shows a web-based opt-in form for SAP Concur partners. At the top left is the SAP Concur logo, and at the top right is the SAP logo with the tagline "THE BEST RUN". The main visual is a photograph of five diverse professionals in a modern office setting, focused on a laptop screen. Below the photo, the text "SAP Concur Partner" is displayed. A blue "Email Opt-In Form" button is centered below the title. To the right of the button is a text box containing a GDPR-style consent statement: "By clicking "submit" below, I agree that Concur Technologies, Inc. can use my name and contact details to communicate with me about matters pertaining to our SAP Concur partnership, in accordance with the [SAP Concur Privacy Statement](#)". Below this text box are two input fields: "Business Email" and a dropdown menu set to "USA". At the bottom right of the form is a large blue "Submit" button.

# 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

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 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 Products:  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 Partner Insights 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

[Support Options](#)[API Lifecycle & Deprecation Policy](#)[Release Notes](#)

## Release Notes

### Developer Platform Release Notes

- [June 2023](#)
- [May 2023](#)
- [April 2023](#)
- [March 2023](#)
- [February 2023](#)
- [January 2023](#)
- [December 2022](#)
- [November 2022](#)
- [October 2022](#)
- [September 2022](#)
- [August 2022](#)
- [July 2022](#)
- [June 2022](#)
- [May 2022](#)
- [April 2022](#)
- [March 2022](#)
- [February 2022](#)
- [January 2022](#)
- [2021 Release Notes](#)
- [2020 Release Notes](#)
- [2019 Release Notes](#)
- [2018 Release Notes](#)
- [2017 Release Notes](#)
- [2016 Release Notes](#)
- [2015 Release Notes](#)
- [2014 Release Notes](#)

# 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.

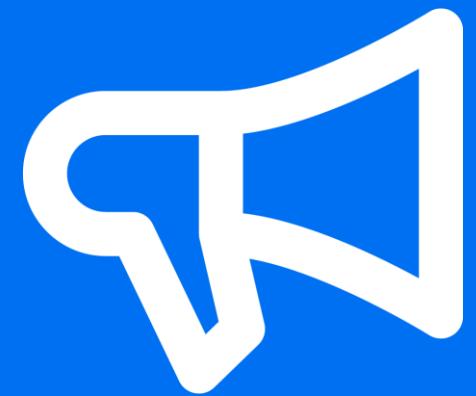
Reach out to [concur\\_AppCenterAlliance@sap.com](mailto:concur_AppCenterAlliance@sap.com) with any questions regarding test entities.

# 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](mailto: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

# 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](#) is the home for documents and links to help partners with:

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



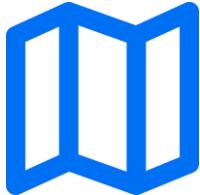
## Monthly Meetings

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



Email: [concur\\_AppCenterMarketing@sap.com](mailto:concur_AppCenterMarketing@sap.com)

# Recommended Marketing Content



Recommended partner content	Where content is surfaced
<ul style="list-style-type: none"><li>▪ Brochures (<b>required</b> for Enterprise applications)</li><li>▪ Landing page covering the integration (<b>required</b> for Enterprise Applications)</li><li>▪ Brief demo &amp; video overviews</li><li>▪ Customer testimonials and case studies (submit via this <a href="#">form</a>)</li><li>▪ Slides to integrate into sales presentations (<a href="#">template</a>)</li></ul>	<ul style="list-style-type: none"><li>▪ Highspot (SAP employees only)</li><li>▪ App Center Jam group (SAP employees only)</li><li>▪ SAP Concur App Center listings</li><li>▪ Concur.com</li><li>▪ Your own website</li><li>▪ Google</li></ul>

During onboarding, the App Center marketing team works with partners to ensure you have essential, correctly-branded marketing pieces.

To edit or send additional marketing content, email the edited/new content to [concur\\_AppCenterMarketing@sap.com](mailto:concur_AppCenterMarketing@sap.com) and plan on a 10-day turnaround for the marketing content review process.

# Sales



# App Center Integration Customer Phases

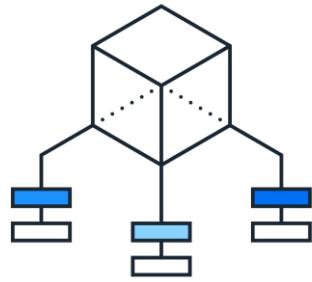


## Sales

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



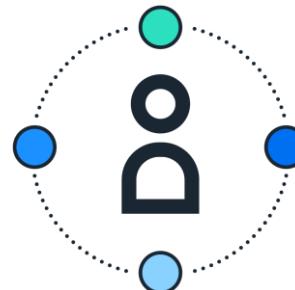
## Solution Consulting

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



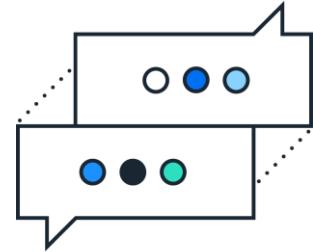
## Implementation

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



## Customer Success

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



## 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**

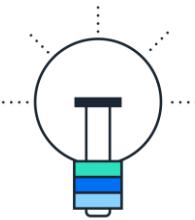
Support Portal

**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



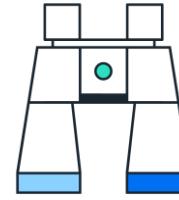
## Productivity



## 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

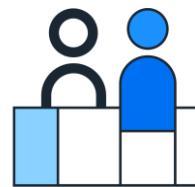
Conversation-ready data, metrics, and content tailored to customer's business outcomes



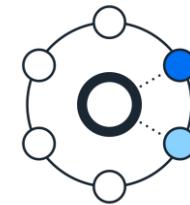
Controls  
& Compliance



Spend  
Governance



Employee  
Experience



Expansion  
& Optimization

## General Definitions across Markets, Segments & Industries

Internal Guidelines

Regulatory Requirements

Fraud Risk

Policy Guidelines

Employee Safety

Spend Channels

Review Processes

Who, What, Where Spending

Spend Analysis

Employee Engagement

Retention

Productivity

Job Satisfaction

Safety & Security

Regional Expertise

Leveraging Data

Industry Focus

M&A

Industry Focus tailoring coming soon

# How to Engage with SAP Concur Sales Teams

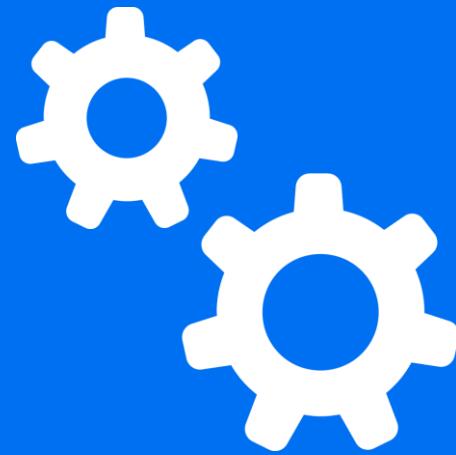
For an in-depth dive into SAP Concur sales organization, review the [App Center Partner Sales Strategy Guide](#).

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 [concur\\_AppCenterMarketing@sap.com](mailto: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 customers they manage that would benefit from your offering beyond leads you've received from them



# Operations



# New Deal Process for App Center Integrations

Partner receives a  
Lead

Partner closes  
deal

Customer agrees  
to the Letter of  
Authorization  
(LOA)

Partner submits a  
Deal Notification  
Form (DNF)

Partner integration  
is implemented



# 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.

Task Information |= Required Information

Due Date  [ [4/17/2023](#) ] Related To  [Company Name](#)

Assigned To  [Full Name](#) Subject

Contact Me First  5 App Center Partner  5

ALERTS:

\*For ENT accounts only, please use the text box to add a max of two more Referrers, if applicable. Otherwise, enter pertinent notes that the Partner should receive.

\*For Endorsed APP PARTNER, please follow instructions to open an opportunity as per guide

Comments 6

ENT -- #2 Concur Rep Name, #3 Concur Rep Name  
SMN + Field Engagement Manager Name  
- # of Employee  
- ERP/Financial System Name, if working with ERP connector partner  
- Indicate if it is an Existing or New Biz Client and include their SAP Concur products  
- Suggest Next Steps – best steps to engage or seek partner help

Additional Information

Status Completed Name  [Contact](#)

Priority  Phone

Email

System Information

Task Record Type

7

# 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](mailto: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](mailto: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  
© Copyright 2018 Concur Technologies, Inc.  
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](mailto: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.

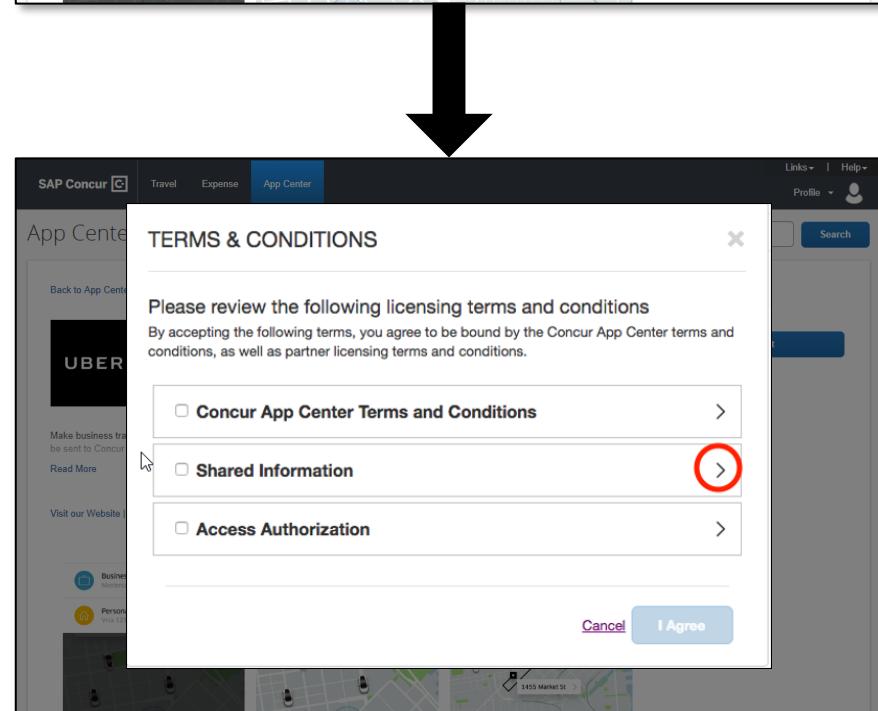
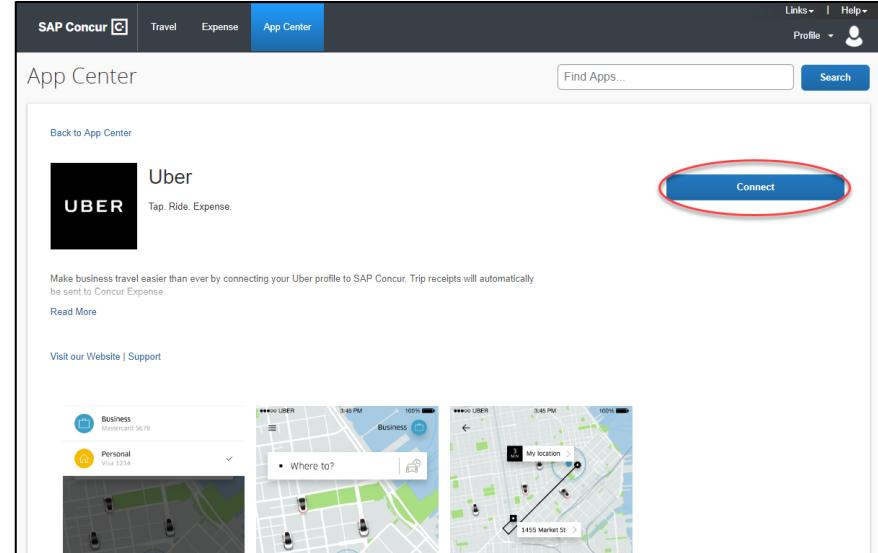
SAP Concur's customer contracts prohibit SAP Concur from sharing any customer data with 3<sup>rd</sup> parties without written consent from the customer—the LOA captures this required consent.

- 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](#). \_\_\_\_\_

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

<p><b>CUSTOMER AUTHORIZATION TO LINK SERVICES AND EXCHANGE CUSTOMER DATA</b></p> <p>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 by Customer to provide certain products or services to Customer. Pursuant to the Agreement, Concur will 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 is issued by Customer to Concur to facilitate the exchange of Customer Data. For purposes of this Agreement "You" shall mean you, the business, government entity, or entity on whom behalf Customer has engaged Concur, which shall mean Concur Technologies, Inc. or one or more Concur affiliates.</p> <p>You have also entered into an arrangement with</p> <p>the provider of certain products or services ("the Provider") that will integrate with the Service and access and use Customer Data as described below:</p> <p>Linking nothing to the contract in the Agreement or otherwise, You hereby:</p> <ol style="list-style-type: none"> <li>(a) authorize Concur to link to the Service with the Provider Services through Concur's API (a description of which can be found at <a href="https://developer.concur.com/api-reference.html">https://developer.concur.com/api-reference.html</a>) and Concur and Providers to exchange Customer Data in accordance with the terms of this Agreement, and to provide Customer Data to the Provider Services, and vice Concur and Providers to receive Customer Data for purposes described in their respective agreements with each other;</li> <li>(b) represent and warrant that You (i) have authority to allow this linking and exchange of Customer Data, (ii) have used commercially reasonable efforts to ensure that the linking and exchange of Customer Data complies with all applicable laws and regulations, (iii) have provided Concur with all information required by law to make such linking and exchange of Customer Data, if required by applicable law, and (iv) have obtained all necessary consents, approvals, and authorizations from Concur and Providers to enter into agreements with Providers and in accordance with any notices, statements, or agreements You have provided to Concur;</li> <li>(c) confirm that Concur's linking of the Service with the Provider Services under this Authorization shall not be deemed to be a transfer of Customer Data to the Provider Services, and that the Customer Data will remain the property of Customer and will not be transferred to the Provider Services, except as otherwise expressly agreed to by Customer and the Provider Services, and will be returned to Customer upon request by Customer;</li> <li>(d) represent and warrant that You (i) have the right to bind your officers, directors, employees, shareholders, agents, authorized users, and members of the foregoing, and all of their respective successors and assigns, from any liability resulting from your failure to comply with the terms of this Agreement, and (ii) will indemnify and hold Concur harmless from and against any and all claims, losses, damages, costs, expenses, and liabilities arising out of or related to (A) your failure to timely deliver, delivery, or provision of any and all Customer Data to Concur or API to the Provider, (B) receipt of Customer Data from the Provider in accordance with this Authorization or (C) Provider's failure to timely deliver, delivery, or provision of any and all Customer Data to Concur or API;</li> <li>(e) indemnify and hold Concur harmless from and against any and all claims, losses, damages, costs, expenses, and liabilities arising out of or related to (A) your failure to timely deliver, delivery, or provision of any and all Customer Data to Concur or API to the Provider, (B) receipt of Customer Data from the Provider in accordance with this Authorization or (C) Provider's failure to timely deliver, delivery, or provision of any and all Customer Data to Concur or API;</li> <li>(f) and agree to defend, indemnify, and hold Concur and its officers, directors, employees, shareholders, agents, authorized users, and members of the foregoing, and all of their respective successors and assigns, from any and all claims, losses, damages, costs, expenses, and liabilities arising out of or related to (A) your failure to timely deliver, delivery, or provision of any and all Customer Data to Concur or API to the Provider, (B) receipt of Customer Data from the Provider in accordance with this Authorization or (C) Provider's failure to timely deliver, delivery, or provision of any and all Customer Data to Concur or API;</li> </ol> <p>This Authorization (i) shall be binding upon Customer and its successors, assigns and transferees to payment of the consideration for the services provided by Concur, and (ii) shall not be binding upon Concur unless it is in writing and signed by Concur to Concur; that is to say that no modification, amendment, or cancellation of this Authorization (i) may be executed and transmitted with facsimile signatures, which shall be fully binding and effective for all purposes.</p> <p><b>EXECUTED</b> by Customer acting under due and proper authority.</p> <p>Name: _____    (full legal name of Customer)</p> <p>Signature: _____</p> <p>Signed by: (insert name) _____</p> <p>Title: _____</p> <p>Date Signed: _____</p> <p style="text-align: center;"><b>INSTRUCTIONS</b></p> <p>AFTER COMPLETION, PROVIDER TO SEND THIS CUSTOMER AUTHORIZATION TO LINK SERVICES AND EXCHANGE CUSTOMER DATA TO CONCUR PARTNERCLIENTACTIVATION@SAFECOM</p>	<p>Last Update April 8, 2018</p>
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# 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](mailto: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 click through 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](mailto: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](mailto: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](mailto: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 Partner-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](#).

### 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](mailto: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](mailto:concur_AppCenter_BillingInquiry@sap.com).

# 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?

Customer Name

Customer Primary Contact

# Support

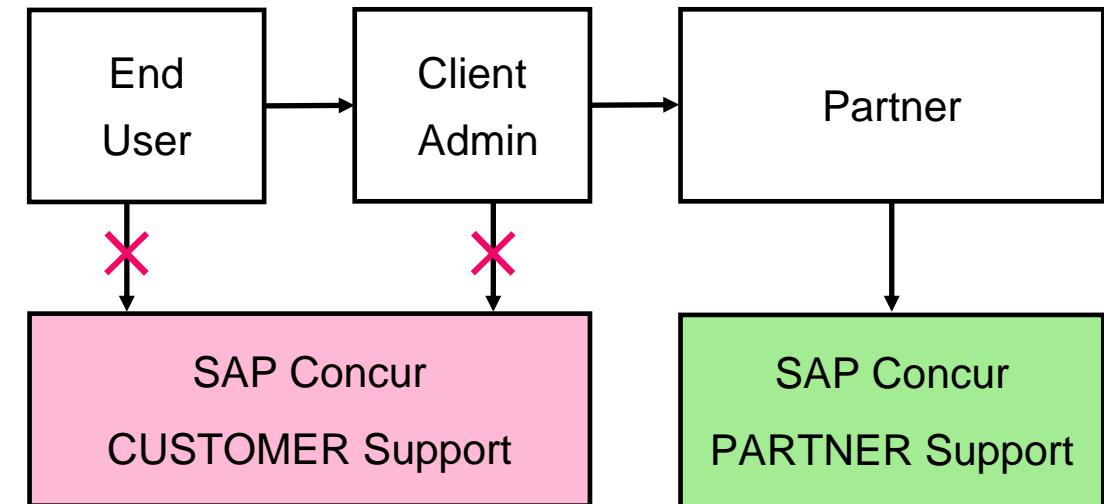


# App Center Integration Support Process

## Level 1 Support: 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
  - Note: This should coincide with the **Support** link on the partner integration's App Center listing
- Enforcing the level 1 policy, and not asking customers to contact SAP Concur directly



## Level 2 Support: 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](mailto: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.

The screenshot shows the SAP Concur Partners portal interface. At the top, there's a navigation bar with 'SAP Concur Partners', 'Home', 'Cases', 'Articles', and a 'Welcome' dropdown. Below the navigation is a search bar with 'Cases' and a 'Go!' button. A sidebar on the left lists 'Recent Items'. The main content area has two sections: 'My Cases' and 'My Accounts Cases'. The 'My Cases' section displays a table with columns: Case Number, Case Owner, Priority, Account Name, and Date/Time Opened. It shows one row with '12141505', 'Scott Meier', 'Priority 3 - Medium', and '7/5/2018 9:14 AM'. The 'My Accounts Cases' section also displays a similar table with one row. Annotations with arrows point to specific areas:

- An arrow points to the 'Create a Case' button with the number '2'.
- An arrow points to the 'Cases you've submitted' section with the text 'Cases you've submitted'.
- An arrow points to the 'Recently closed cases' section with the text 'Recently closed cases'.
- An arrow points to the 'Cases your team has submitted' section with the text 'Cases your team has submitted'.
- An arrow points to the search bar with the text 'search for common issues and resolutions'.

The screenshot shows a 'Case Description' form. At the top is a 'Secure Customer Login' section with fields for 'User Name' and 'Password', a 'Forgot your password?' link, and a 'Login' button. A large number '1' is in a circle above this section. Below it is the 'Case Description' form itself. It includes fields for Topic (set to 'Platform Partner'), Case Type (dropdown), Urgency (radio buttons), Subject (text input), (Customer) Assessment (dropdown), Description (text area), Priority (radio buttons), Case Region (dropdown), Site/URL/Acct. # (text input), and Call Me (checkbox). The next section is 'Partner Support Bugs | Issues' with fields for User Login ID, Expected Results, Re-Creation Steps, and Actual Results. The final section is 'CC Information (Email Addresses of Persons To Be CC'd On Case Updates)' with fields for CC Email 1 through 8. At the bottom are three buttons: 'Submit' (highlighted with a black box and number '3'), 'Submit & Add Attachment', and 'Cancel'.

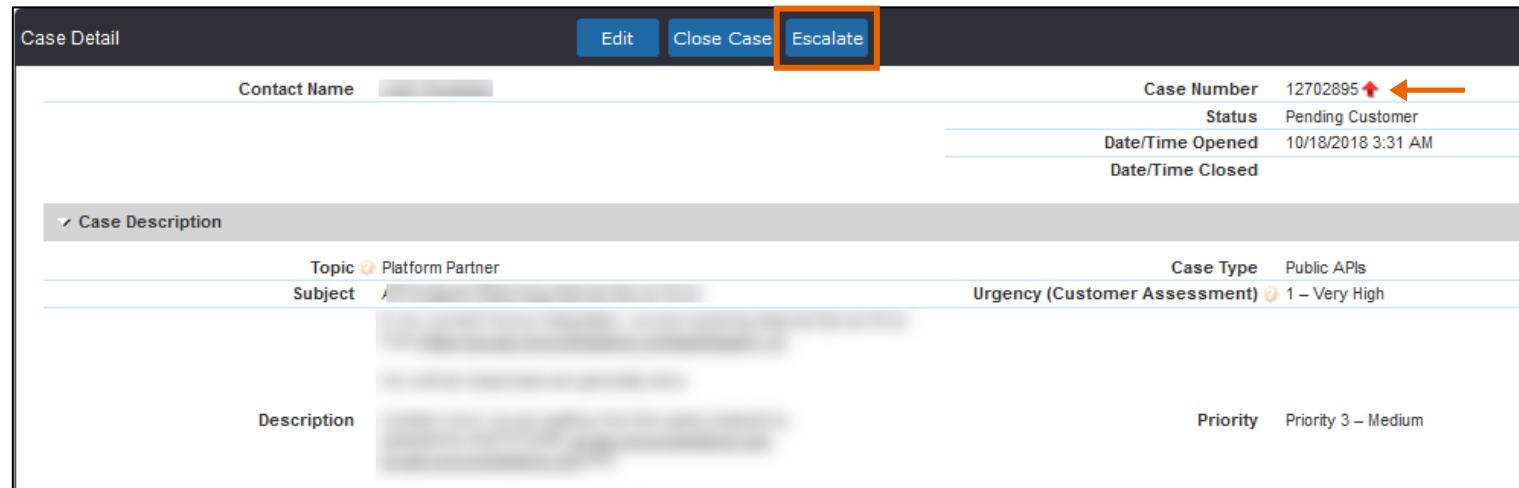
# How to escalate a Partner Support Case

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](mailto:SAPConcurPartnerSupport@sap.com) and CC [concur\\_AppCenterAlliance@sap.com](mailto: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**

Want a better spend management experience? Challenge accepted.

Our APIs and your ingenuity are a powerful combination. Together we can deliver innovative solutions for your own organization or across the 48 thousand companies who use SAP Concur for travel booking, expense reporting, and accounts payable processes. What can we help you build today?

SAP Concur Developer Center

DEVELOPMENT ▾ PARTNER RESOURCES ▾ SUPPORT ▾

Support Options

Support Scenarios

- Partners have two choices depending on the scenario.
  - Non-technical issues contact your Alliance Manager or the Alliance Team.
  - For technical issues log a support case.
- Company Administrators access the FAQ and other resources to get the help you need.
- Individual Users of SAP Concur products should request assistance from their company's internal help desk or their company's SAP Concur administrator.

Maintenance Schedule and Service Status

The SAP Concur platform undergoes routine maintenance each weekend, and releases updates monthly. During these periods, the service may be unavailable. Unplanned maintenance is performed rarely, and limited to high priority fixes. During downtime, any request to the SAP Concur Platform will receive an HTTP 503 error code. To check the current status see Service Status where a message will be posted during planned maintenance.

Monthly Release Schedule

For details regarding planned releases, see the SAP Concur [Release Calendar](#).

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

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`, `PATCH`
    - `POST` payload.
  - API Response Information
    - All HTTP Headers
    - Response payload.
  - Additional log information relevant to the issue.

# 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**.

SAP Concur C

## Concur Open

Service Status Dashboard  
Up-to-the-minute service availability and performance information

Service	Current Status	Apr 16	Apr 15	Apr 14	Apr 13	Apr 12	Apr 11	Apr 10	Apr 9	Apr 8	Apr 7	Apr 6	Apr 5	Apr 4	Apr 3	Apr 2	Apr 1
Expense	Operating Normally																
Travel	Operating Normally																
Invoice	Operating Normally	Outage	Operating Normally														
Request	Operating Normally																
Imaging	Operating Normally																
Analysis/Intelligence	Operating Normally																
Mobile	Operating Normally																
Locate	Operating Normally																
Compleat (TMC Services)	Operating Normally																

Operating Normally   Outage   Partial Outage

SAP Concur C Developer Center

DEVELOPMENT ▾ PARTNER RESOURCES ▾ SUPPORT ▾

Support Options

Support Options API Lifecycle & Deprecation Policy Release Notes Videos Samples

Release Notes

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Monthly Release Schedule

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SAP Concur Release Calendar

Products	2019	2020
The calendar includes: <ul style="list-style-type: none"><li>All editions of Expense, Invoice, Request, and Travel</li><li>Triplink</li><li>Analysis/Intelligence</li></ul> <a href="#">SAP Concur Processor Privacy Policy</a> - and - <a href="#">SAP Concur Marketing Privacy Policy</a>	Rev 6: Dec 9 2019 PDF	Rev 3: Apr 6 2020 PDF
<b>Revision History for 2020:</b> Rev 3: Apr 6 2020 - April release cancelled Rev 2: Dec 20 2019 - Added note about locked code Rev 1: Nov 25 2019 - Added Travel Release presentation dates NEW: Nov 7 2019		
<b>Revision History for 2019:</b> Rev 6: Dec 9 2019 - The December release spans the following two dates: December 7 for customers using the EMEA, China, and PSCC data centers; December 13 for customers using the US (North America) data center Rev 5: Sep 4 2019 - October release cancelled Rev 4: Aug 28 2019 - September release moved from September 14 to September 21 Rev 3: Aug 9 2019 - August release moved from August 10 to August 17 Rev 2: Jul 17 2019 - July release cancelled Rev 1: Jul 8 2019 - July release moved from July 13 to July 20 Initial post: Oct 25 2018		