

Concur Integration

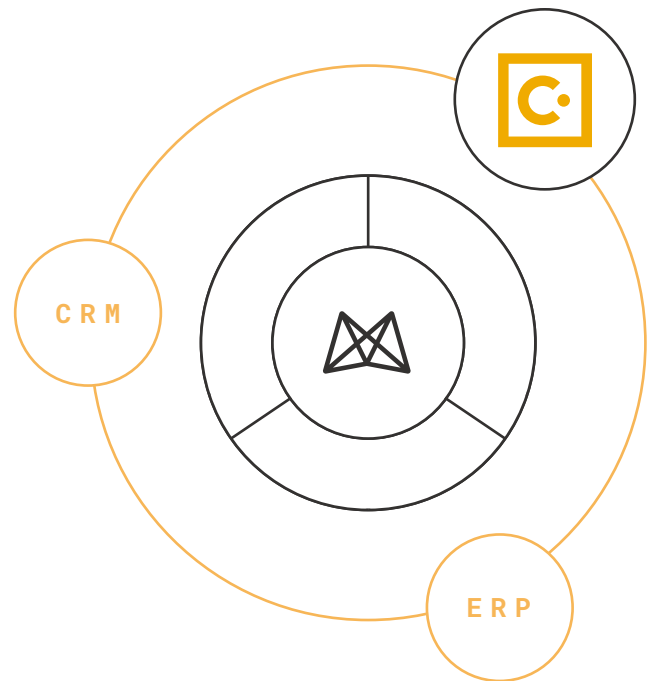
Mavenlink's Concur integration provides a very robust set of expense reporting features that many companies rely on.

This integration allows companies to continue using Concur for expense reporting, while gaining the ability to see the impact of project-based expenses on the financial health of the project.

Employees do not need to change the way they log expenses and expense approvers continue to approve expenses in Concur. Companies that have employees that don't use Mavenlink can now centralize expense reporting and approval.

BENEFITS

- Simplify expense tracking and approval processes
- Customize detailed expenses using Concur's advanced functionality
- Unify all time and expense information across projects
- See all time and expense information in a centralized system
- Ensure budget burn remains accurate



SAP Concur

AVAILABILITY & ACCESS

The Concur integration is available to Mavenlink Premier and Enterprise accounts. The Concur account must have Web Services enabled.

Once the integration has been activated by a Solutions Engineer, the integration will be administrator-configurable using the Mavenlink Integrations web-based user interface.

GET A COMPLETE VIEW OF YOUR PIPELINE AND PROJECTS

Functional Capabilities

- Sync Mavenlink Projects into a Concur Custom List
- Mavenlink Project titles are maintained in a Custom List in Concur, so employees logging expenses can select the Mavenlink Project with which to associate the expense report
- Approved expense reports in Concur are pushed to Mavenlink as expenses within a project
- Images and other documents attached to the Concur expenses are pushed to Mavenlink. If multiple files are attached to the Concur expense, a PDF is created to combine the documents into a single file
- Schedule data sync between Mavenlink and Concur
- Configuration Options
- Mavenlink Administrators can choose the Concur List field in which to store the Mavenlink Project list
- Mavenlink Administrators can choose which Concur status is considered “approved”
- Mavenlink Administrators can choose with Concur field indicates whether the expense is “billable”
- Schedule data sync between Mavenlink and Salesforce

Concur Field Mappings

Projects

Mavenlink Field	Direction	Concur Field
ID	▶	List Item Level 1 Code
Title	▶	List Item Display Name

Expense Reports

Mavenlink User	Direction	Concur Field
Notes	◀	Expense Type + Vendor Description + Description
User	◀	Employee
Billable	◀	Billable field (configurable)
Category	◀	Category Name
Date	◀	Transaction Date
Amount	◀	Approved Amount
Receipt	◀	Attachments

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