

Concur Invoice Configuration Tips

Two Time Savers You Can Put to Work Today

How do you get more out of your Concur Invoice investment? Spend less time using it.

Think of it this way: You're processing hundreds – maybe thousands – of invoices every month, and your Concur Invoice solution is trimming hours off each of them. But can you speed up the current processes, so you can focus on other priorities? Definitely.

These two simple tips will help you get there by getting more out of your investment. In less time.

Tip #1: Save Favorite Distributions

Invoice charges for things like office supplies and insurance billing don't belong to one department, they belong to everyone. But you're the one who spends your time allocating 10% here, 10% there, and 10% over and over again in a manual, mind-numbing process.

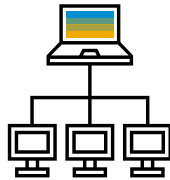
Here's how you do it:



1. Set up the distribution as you normally would.



2. Name it and save it as a favorite in the Distributions Tab.



3. The next time you get the invoice, select the saved distribution and the system will apply it across departments.

You won't have to type everything in again. So instead of managing multiple distributions across multiple cost centers, GL codes, and who knows what else, you can click and be done.



Here's when you do it:

Saving favorite distributions is a simple time saver in a variety of instances:

Think of huge health insurance bills that have to be divvied up amongst every department and division.

Or utilities like rent, electrical, and internet that are split between your business locations.

Maybe it's outside consulting or more toner cartridges – it all has to be spread across the company in precisely the right allocation.

Tip#2: Create Custom Queries

How do you find a particular invoice without a shovel and flashlight? You create a custom query in Concur Invoice. Instead of keying in search terms and sifting through an avalanche of results, you get what you need and get on with it.



Imagine it's year-end, and you need to find accruals. You can run a query for invoices you've received that haven't hit your books yet.



Perhaps you're tracking credit from vendors to make sure you're getting what you're due. You can set up Concur Invoice to see all the vendors from whom you've received credit memos.



Maybe an employee has moved on and they're no longer active in your Concur Invoice solution, but they still have invoices assigned to them. You can run a quick query, find the invoices, and reassign them.



If an employee is out of the office and has set up delegates to approve invoices during that time away, you can even run a report to see which invoices were approved by someone else – so you can give them an extra review.



Concur Invoice allows you to save specific types of searches based on your customized conditions. So no matter which invoice – or what type of invoice – you need, you can save a query, come back anytime, and click through to the exact results you want.

Save AP hours in a couple of clicks.

Talk to your account manager to get more information on custom queries and other configuration tips.