

FinancialForce & Concur Integration

Best in class expense management paired with best in class PSA

Concur is a popular choice as a company-wide Travel & Expense management system, and FinancialForce PSA is the system of record to manage the sales to delivery process holistically. This includes the financial view of a project.

The FinancialForce-to-Concur connector allows you to seamlessly connect FinancialForce PSA and Concur to streamline your processes, ensuring that corporate expense policies are adhered to and expenses stay in sync with the Project.

This integration provides the ability to have a consistent experience for employees entering expenses, complying with all internal policies and approvals, allowing resources to enter critical data only once. The project manager and practice lead can see one comprehensive view of the project, allowing them to monitor costs, manage change, and ensure billing and revenue forecasting remain accurate. As a result, your organization can more successfully deliver projects in budget and increase customer satisfaction, while ensuring quick reimbursement for your employees.

Concur to PSA Connector flow

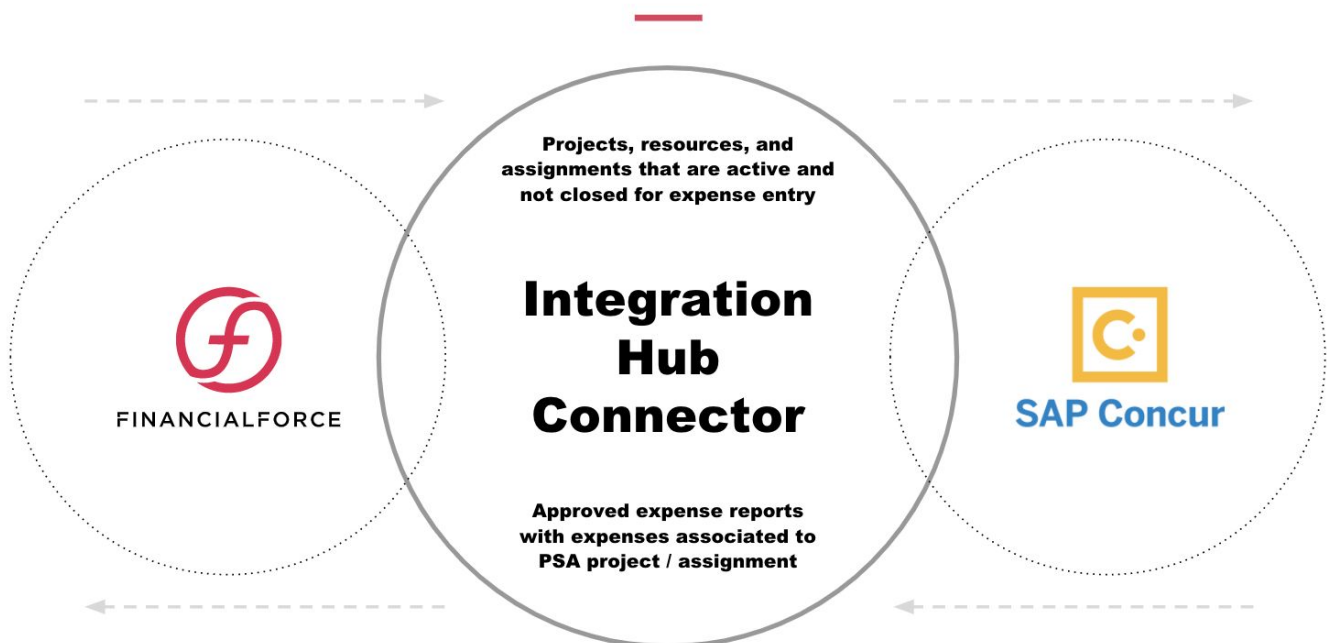


Figure 1: Flow of data between FinancialForce PSA and SAP Concur

Key benefits

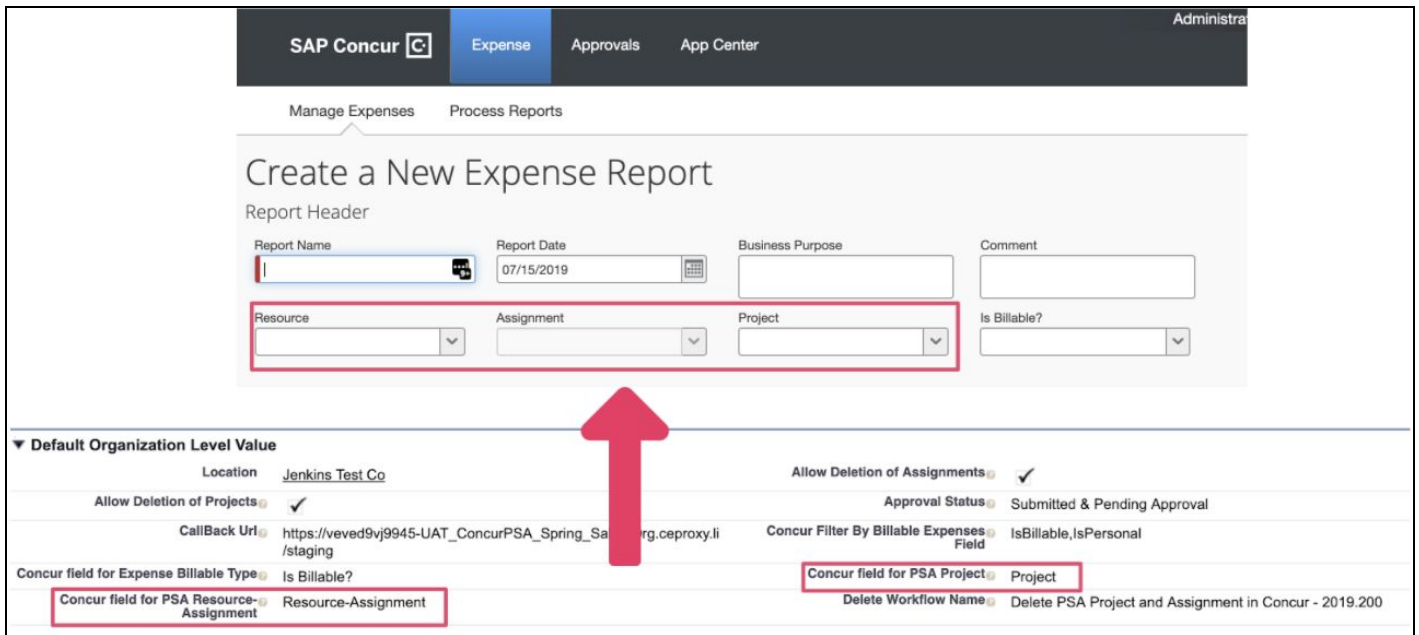
- One process for corporate expense management
- Resources enter critical data once
- Full synchronization between FinancialForce PSA and Concur, no re-entry
- Comprehensive view of project costs
- Shorter time to invoice

Capabilities

- Automatically create project, assignment, and resource data in Concur based on PSA records.
- Concur expense reports synch directly to PSA expense reports against a Project.
- The integration can be configured to only pass the relevant projects or expenses, that way Concur does not have projects that are not available for expense entry.

Prerequisites

- SAP Concur Standard Edition or SAP Concur Professional Edition
- SAP Concur Web Services
- FinancialForce Integration Hub for Concur
- Salesforce org with FinancialForce PSA Fall 2019 or newer installed



The screenshot shows the 'Create a New Expense Report' interface in SAP Concur. The form is divided into a 'Report Header' section and a configuration section below. In the 'Report Header', there are input fields for 'Report Name', 'Report Date' (07/15/2019), 'Business Purpose', and 'Comment'. Below these are dropdown menus for 'Resource', 'Assignment', 'Project', and 'Is Billable?'. A red box highlights these four dropdown menus. A large red arrow points from this box down to the configuration section. The configuration section is titled 'Default Organization Level Value' and contains several settings. One setting, 'Concur field for Expense Billable Type', is set to 'Is Billable?'. Another setting, 'Concur field for PSA Resource-Assignment', is set to 'Resource-Assignment'. A third setting, 'Concur field for PSA Project', is set to 'Project'. A red box highlights this setting. Other settings include 'Allow Deletion of Projects' (checked), 'Approval Status' (Submitted & Pending Approval), and 'Delete Workflow Name' (Delete PSA Project and Assignment in Concur - 2019.200).

Figure 2: FinancialForce PSA Resource, Project, and Assignment fields as custom fields in Concur