

Concur and Salesforce® CRM: Better Together

Salesforce and Concur make a great combination – while one helps you reduce costs, the other helps you increase sales and both create efficiencies for employees. With the introduction of the Concur Salesforce® Connector these two solutions can be instantly integrated in the cloud to provide unparalleled visibility and ease-of-use.

What is the Concur Salesforce Connector?

The Concur Salesforce Connector is a pre-built integration used to share data from both products in real-time. It's simple to activate and requires no custom coding so you can be up-and-running quickly.

- Contact records within Salesforce can be accessed instantly and added as attendees in Concur's Expense solution, reducing manual entry, duplicates and the need for data-maintenance routines.
- Users can associate expense reports, entries and itemizations with existing opportunities in Salesforce enabling accurate reporting and benchmarking for cost-of-sales.
- Travel plans can be shared via Salesforce® Chatter enabling colleagues to easily collaborate on client meetings and events.

Benefits of integrating travel and expense management with CRM

Sales and service professionals don't have extra time to spare so ensuring they have instant access to what they need is the best way to ensure reliable data entry. With the Salesforce Connector, submitting expenses becomes even easier if the data already exists in Salesforce – encouraging timely recording of contacts and opportunities. Additional benefits include:

- Improved **user experience** and increased **efficiency**
- **Real-time visibility** – delivers instant insight into costs associated with customer acquisition and account management
- Reduced **data management** overheads and headaches

The image displays three overlapping screenshots from the Concur and Salesforce systems. The top-left screenshot shows the 'New Expense' form in Concur, with fields for Expense Type (Business Meals - Meetings), Transaction Date (09/27/2011), Business Purpose (Business), City (San Francisco, California), and Amount (\$225.00). The top-right screenshot shows the 'Search Attendees' dialog box, where 'Salesforce Contact' is selected as the attendee type, and search criteria for Last Name (Rachel) and First Name (Josephs) are entered. The bottom screenshot shows a 'Trip' record for 'Fusion 2011' and a 'Segments' table.

Segment Name	Vendor	Start Date	End Date	Start Location	End Location
Alaska Airlines 606	Alaska Airlines	2/14/2011 10:50 AM	2/14/2011 12:20 PM	SEA	LAS
Alaska Airlines 611	Alaska Airlines	2/19/2011 4:05 PM	2/19/2011 6:33 PM	SEA	LAS
The Cosmopolitan Las Vegas, NV	The Cosmopolitan	2/14/2011	2/19/2011	LAS	LAS
Hertz McCarran International Airport	Hertz	2/14/2011	2/19/2011	SEA	LAS

About Concur

Concur is a leading provider of integrated travel and expense management solutions. Concur's adaptable Web-based and mobile solutions help companies and their employees control costs and save time. [Learn more at www.concur.com](http://www.concur.com)