

Manual Personal Card Import Feature Retirement

Updated: September 2021

We are committed to providing seamless features and functionality that improve the user experience and help customers take a strategic, intelligent approach to spend management. As we have evaluated our product investments to provide the most benefit to our customers, we've decided to retire the manual personal card import feature of Concur® Expense.



This feature has seen very limited use by our customers and is increasingly complex to maintain as the industry changes. As a result, this feature is not available in our NextGen user interface (UI) for Concur Expense. An automated alternative feature already exists for customers to take advantage of.

Your organization will lose access to this feature when you move to the NextGen UI or by the automatic transition date on October 1, 2022.

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FREQUENTLY ASKED QUESTIONS

What's happening?

As we have evaluated our product investments to provide the most benefit to our customers, we've decided to retire the manual personal card import feature of Concur Expense.

Why are we retiring this feature?

We are committed to providing seamless features and functionality that improve the user experience and help customers take a strategic, intelligent approach to spend management. For most customers, an automated and more user-friendly alternative feature already exists that automates integration of personal data into Concur Expense.

When is this happening?

The manual personal card import feature is not available in the NextGen user interface (UI) for Concur Expense. This means that when your organization moves to the updated UI, your users will no longer have access to the manual personal card import feature. We recommend moving your organization away from manual personal card import feature and to the NextGen UI now. All remaining customers will be moved to the NextGen UI for Concur Expense automatically starting October 1, 2022. Please [refer to our NextGen UI for Concur Expense FAQ](#) for more information.

What is the updated UI for Concur Expense?

It is the continued evolution of the Concur Expense solution user interface experience. It's the result of thoughtful design and research that provides a modern, intuitive, and streamlined experience for creating and submitting expense reports. At this time, we have moved into the active move period, and we are requiring that all customers start moving now. All remaining customers will be moved to the NextGen UI for Concur Expense automatically starting October 1, 2022. [Find out more here.](#)

What alternative methods exist to manage our users' personal card transactions?

You should start to move your organization away from the manual personal card import feature now. There are several options that can replace the manual personal card import feature:

- **Automated personal card import (Yodlee):** This feature allows users to add their personal credit cards. When users add a personal card, Concur Expense automatically captures and displays all of their card transactions. Users can choose which transactions to add to their expense report.
- **The SAP® Concur® mobile app and Expenselt®:** Encourage use of the SAP Concur mobile app to take pictures of receipts as soon as they happen instead of afterwards with an import.

Additionally, if your organization has Expenselt, this creates and completes expense report line items for users automatically, saving even more time.

- [SAP Concur mobile app](#)

- **Corporate card program:** Consider if those users who are submitting personal card charges should instead be issued a corporate card. Card providers offer a more robust data feed into Concur Expense. If your organization doesn't have a corporate card program and you think you may be ready or qualify, please discuss your card program with your card provider or your SAP Concur account team.

How does the automated personal card import feature (Yodlee) work and how do we activate it?

Personal charge card transactions will be automatically fed into Concur Expense once this feature has been activated and the user adds the personal card to their profile. There is no cost to use this feature. Please note: when users activate the automated personal card import feature (Yodlee) and activate their card vendor(s), they no longer need to import transactions using the manual feature.

- **Standard edition:** This feature is already activated for your organization. To enable this feature for your users, go to Expense & Invoice Settings > Compliance Controls > Compliance Rules > Allow users from these countries to add personal credit cards for importing expense transactions. More information is available in the [Compliance Controls](#) documentation.
 - Once the automated personal card import feature is enabled for users, they may add personal credit cards in their profiles: Profile > Profile Settings > Expense Credit Cards. Additional information regarding card registration is available in the [Register a Credit Card](#) documentation.
- **Professional edition:** Submit a Support case to SAP® Concur® Support in order to have it activated. In the case description, state something like "We want to stop using the manual personal card import feature and start using the automated personal card import feature." After working with Support, use this documentation for reference:
 - To create/modify a group for users to register credit cards: [Expense: Group Configurations Setup Guide](#)
 - To set the payment types for card transactions: [Expense: Payment Types Setup Guide](#)
 - User Help: [Register a Credit Card](#)

What if the automated personal card import feature (Yodlee) imports some of the same transactions that a user had previously imported using the manual file?

This would create duplicate transactions in Concur Expense. These duplicate transactions will need to be manually deleted by each user.

What editions of Concur Expense does this impact?

We will retire the manual personal card import feature for both Standard and Professional editions of Concur Expense. The automated personal card import feature, SAP Concur mobile app, and Expenselt are all available for both editions.

Where can I go to learn more?

If you have additional questions that the resources above do not answer, you may reach out to your SAP Concur account team or SAP Concur Support. Know that there is no report that shares which users are submitting expenses through manual personal card import. If you have questions about NextGen UI for Concur Expense, [please refer to this FAQ](#).

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