

**- CLIENT FAQ -  
Concur's mobile app  
Android - BlackBerry - iPhone/iPad/iPod touch  
May 11 2012**

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## General Information and Requirements

### 1. How is Concur's mobile app useful?

Concur's mobile app is a natural extension of Concur's full-featured, web-based service – Travel & Expense – which integrates travel and expense processes. With the mobile app, travelers can manage trips and expenses, and add items such as taxis, hotels, and rental cars – all from a mobile device.

The solution enables business travelers to access important travel and expense information when it isn't easy to use a laptop that's connected to the Internet, such as in the back of a cab or in a meeting. With the mobile app, travelers can take advantage of a variety of features to manage these tasks.

Managers can review employees' expense reports and invoices (for clients who use Concur's invoice management service) in detail, allowing them to approve or reject reports/requests wherever they may be traveling.

### 2. Does the mobile app offer the same functionality as Concur's full-featured, web-based service?

This app is a mobile companion to Travel & Expense – offering the flexibility to perform tasks from a mobile device. While it complements Concur's end-to-end solution functionality, it does not contain full functionality.

### 3. Why would a traveler need to manage travel, expenses, and payment requests using their mobile devices?

Business travelers can manage their itineraries and expense transactions in a timely manner and within company policies. Managers can review employees' expense reports in detail, allowing them to approve or reject reports wherever they may be traveling.

With the convenience of invoice (payment request) approvals on mobile devices, invoice cycle time is reduced, which reduces the risk of late payment fees and provides the opportunity to take advantage of early-pay discounts.

### 4. How does Concur's mobile app differ from competitive offerings?

Concur's mobile app encompasses travel features (like booking hotels and transportation) and expense features – to provide a comprehensive mobile solution for the business traveler. The mobile app makes the mobile worker more efficient and productive.

### 5. Is the mobile app available only to customers of Travel & Expense or can others, for example, stand-alone Travel customers, use it?

The mobile app is available to any client using Concur's integrated Travel & Expense. In addition:

- Stand-alone Travel users can access the Travel-related features.
- Stand-alone Expense users can access the Expense-related features. These users can also search for, book, and cancel taxi and dining (depending on the device).

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**NOTE:** Concur's mobile app is **not** available to clients using Concur's *on-premise* stand-alone solution.

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- Stand-alone Invoice approvers can review, approve, or reject payment requests as well as search for, book, and cancel taxi and dining (depending on the device).

If the company uses Concur's Locate & Alert service, all devices (except iPad) can be used by travelers to check in and request assistance from their companies.

Over time, additional features will be added.

Also:

- Partner Travel Management Companies (TMCs) can send trip information to Concur using Web Services, enabling TMC customers – who are not Concur customers – to view itineraries on Concur's mobile app.
- For clients who use Travel and an expense solution **other than** Concur's expense service – the Travel-related features of the mobile app are available; the Expense-related features are not.

**6. How does this mobile app differ from the mobile offering Concur announced in 2002?**

Our previous mobile product allowed users to work offline in a disconnected laptop version and then synchronize the data while online. This version of Concur's mobile app allows users to access their expense and travel information using a mobile device.

**7. Can a client make the mobile app available to only certain users?**

No. Concur's mobile app is available for all of a client's users, based on general user roles – not a *mobile user* role:

- Users with the Travel Wizard User role can access the Travel-related features.
- Users with the Expense User role can access the Expense-related features.
- Users with the Payment Approver role can access the Invoice-related features (depending on the device).

**8. In which countries is Concur's mobile app supported?**

Concur's mobile app is available worldwide and supports U.S. English, U.K. English, Canadian French, French, German, Italian, Spanish, and Japanese.

**9. Which mobile devices can be used with the mobile app?**

Currently, the app can be used with the BlackBerry, Android, iPad, iPod touch, and iPhone. Users can check with their Concur administrators about the appropriate operating systems for each device. Clients can also access the supported configuration information located on Concur Client Central.

**10. Why isn't it offered for Windows, Palm, or Symbian?**

Concur plans to extend the mobile app to other platforms – based on client demand and market requirements.

**11. Must the mobile user have access to the Internet?**

Yes. Internet access is needed to get started the first time.

**12. If a mobile user has a mobile device but not a data plan, can he/she use the mobile app?**

Yes. Users can connect over Wi-Fi.

**13. Can one person use multiple devices for Concur's mobile app?**

Yes. The same user name and mobile PIN can be used on multiple devices.

#### **14. Can one mobile device be used for multiple people?**

Yes. Each user logs in with his/her unique Concur user name and mobile PIN.

#### **15. Is there a fee for the mobile app?**

No. There is no additional charge to install or use the mobile app.

#### **16. If service is lost, will the device save the activity/expenses that have already been created?**

Yes.

#### **17. How does Concur ensure that personal information remains secure?**

Concur's mobile app is designed to conduct transactions without transmitting sensitive credit card or other personal data. Clients' credit card information stays in Concur's secure data center only – not on the mobile device. Using established technologies and practices, Concur ensures that our clients' information is safe and protected and that our services are available and perform properly, whether clients use Concur's web-based service or the mobile app.

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## **Deployment, Installation, Configuration, and PINs**

### **1. How is the mobile app activated?**

Concur automatically activates the mobile app for all clients.

### **2. Do clients need a project team to deploy the app?**

No. Concur's mobile app is activated for all users and will not require additional resources from the client's side.

### **3. How does a user install Concur's mobile app?**

**BlackBerry:** Users can access the app in these ways:

- Users can go to the **Mobile Registration** page (Profile > Mobile Registration in Concur's web-based service) and request that an email (which includes the URL and installation instructions) is sent to the user's BlackBerry. Users open the email on the BlackBerry and click the URL to download the application.
- Users can download Concur's mobile app from BlackBerry App World. Users can:
  - ◆ Go to BlackBerry App World and search for *Concur*.  
– or –
  - ◆ Use the **Get it at BlackBerry App World** badge on the **Mobile Registration** (Profile > Mobile Registration) page.

- Companies using BlackBerry Enterprise Servers can also *push* it to its users.

**iPhone/iPad/iPod touch:** On the mobile device, users can go to the App Store and search for *Concur*. Users select the Concur Mobile application and select Install.

**Android:** Users can access the app in these ways:

- Users can go to Google Play and search for *Concur*. Users select the Concur Mobile application and install.  
– or –
- Users can scan the scan image on the **Mobile Registration** (Profile > Mobile Registration) page.

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**NOTE:** If the user does not have a scanner for the Android, the user can get one in Google Play.

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#### 4. BlackBerry – Can Concur's mobile app be deployed via a BES (BlackBerry Enterprise Server)?

Yes. The app can be deployed via BlackBerry Enterprise Server (BES). There are three ways to manage this:

- **OTA:** Clients can configure their BES server to permit over-the-air (OTA) download and installation of third-party applications in order for their employees to use them.
- **BlackBerry App World:** Clients can configure their BES server to permit employees to download Concur from the BlackBerry App World.

There is a reference document available that explains the steps that a client must take in order to use BES. The document is available in the **Concur Mobile App** folder on Concur Client Central.

- **Push:** Concur can provide the installation files directly to clients, who can then provide them to their users. The client can install these files on the BlackBerry Enterprise Server and automatically *push* the application to all their users' BlackBerry.

These users must still create a Mobile PIN. The user can create a PIN by accessing the **Mobile Registration** page (Profile > Mobile Registration in Concur's web-based service) or by selecting the **Need to Register** button on the login screen on the BlackBerry.

Clients using the *push* installation method must also manage the upgrade of new releases of the app. These upgrades will occur quarterly. Clients will download a new set of files from Concur Client Central and push the new files to their users. There is a grace period before users are required to upgrade.

## 5. How does a user create a mobile PIN and log in to the application?

The user's Concur user name and mobile Personal Identification Number (PIN) are required for mobile login. The mobile PIN is specifically for Concur's mobile app and is different from the password used in the web version of Concur.

A user can create (and change at any time) the PIN in two ways:

- When logged into the web version of Concur, go to Profile > Mobile Registration. Enter and verify the PIN, and then select **Update/Create Mobile PIN**.
- From the mobile app login screen, select **Register**. Enter the user's Concur user name and password. Enter the PIN twice.

## 6. The registration page is asking the user for a Concur user name and password. Since the user logs in to the web version via his/her company portal (single sign-on), the user does not know the Concur login information. What should the user do?

Single sign-on users should log into the web version of Concur as usual and go to Profile > Mobile Registration. The user can then enter the PIN and then select **Update/Create Mobile PIN**.

The mobile PIN that the user sets on the **Mobile Registration** page is specifically for Concur's mobile app and *is different from the password used in Concur's full-featured, web-based service*.

## 7. What is the average time to get up and running on the mobile app?

A user can complete the PIN creation process and access the app in about five minutes.

## 8. BlackBerry – Does it require MDS to function?

Concur's mobile app is available as a BlackBerry application. BlackBerry Mobile Data Service (MDS) is supported but is not required.

## 9. BlackBerry – What does the Network Settings refer to on the Options screen?

**Auto Detect:** This is the default setting. When this is set, the application will attempt each of the following connection types until it finds one that works. Order of attempt: Wi-Fi, BES, BIS, TCP/IP, WAP2, and MDS Public

- **Wi-Fi:** Wireless local area network

- **BES:** BlackBerry Enterprise Server; this is available only if the BlackBerry has been registered on a corporate server
  - ◆ **BES:** it has the EndToEnd**Required** option.
  - ◆ **BES-2:** it has the EndToEnd**Desired** option.
  - ◆ **BES-3:** it has no end-to-end option.
- **BIS:** BlackBerry Internet Service; the service is usually provisioned through a mobile phone service provider
- **TCP/IP:** Transmission Control Protocol (TCP) and the Internet Protocol (IP)
- **WAP2:** Wireless Application Protocol
- **MDS Public:** Used for international users with devices from one country in conjunction with a different country's wireless provider

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**NOTE:** When Concur is installed on the BlackBerry, it is installed with **Auto Detect** selected, which is the preferred network setting. If a connection type other than **Auto Detect** is selected, only that connection type will be attempted.

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## 10. As Concur enhances the application, how will users receive software updates?

The method for receiving software updates depends on the device and how the application was first installed.

**iPhone/iPad/iPod touch and Android:** Users who downloaded the application from the Apple App Store or Google Play will automatically be notified by the store/market when an update is available. Users should download updates promptly.

### **BlackBerry:**

- Users who downloaded the application from BlackBerry App World will automatically be notified by App World when an update is available. Users should download updates promptly.
- BlackBerry users who work for companies that deploy applications using the BlackBerry Enterprise Server (BES) will either have the updated application *pushed* to their BlackBerry or receive other instructions from their administrator.
- Users who have download from <http://mobile.ota.concursolutions.com/mobile.aspx> will be prompted the next time they login and a new version is available

## 11. How does a user re-set his/her PIN?

Users can reset the mobile PIN on the **Mobile Registration** page (Profile > Mobile Registration in the web version of Concur) or directly from their device's login screen via the **Register** link.

## 12. How does an administrator re-set a PIN?

The company's mobile administrator can clear a user's mobile PIN. When done, the user must re-enter a new mobile PIN to access the mobile app.

To do so, the administrator can access the user's information in Administration > Company Admin (in the web version of Concur) and select the **Remote wipe mobile device** check box for the user.

## 13. What should a user do in case of a lost mobile device with Concur's mobile app installed?

The user should immediately change his/her mobile PIN using the web version of Concur. To do so, the user accesses Profile > Mobile Registration, enters and verifies the PIN, and selects **Update/Create Mobile PIN**.

Minimal information is stored locally on the mobile device, for example, information entered off-line is stored until the app reconnects to the Internet and syncs with Concur. **Credit card information is never stored on the mobile device.** As an added precaution after losing a device, the company's mobile administrator may remotely wipe data from device through the User Administration tool.

If the administrator selects the **Remote wipe mobile device** check box for the user, the next time a user logs into the mobile app (either through manual login or auto-login), all mobile data will be cleared from the device.

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## Expenses and Expense Reports

### 1. Can users enter personal car mileage?

All users (iPhone/iPad/iPod touch, Android, and BlackBerry) can add fixed-rate and variable-rate mileage expenses.

### 2. What functions can a user perform with regards to managing their expenses and reports?

A user can view and edit expenses and expense reports (including report status and expense details); create *mobile* "quick" expenses (for items such as meals) as well as edit or delete them; take a picture of the associated receipt; create new expense reports; attach downloaded credit card transactions and mobile "quick" expenses to an expense report; and submit reports.

Other features may differ slightly by device. For complete information, refer to the *Introduction to Concur's mobile app* for the various devices. These documents are available via:

- The **Learn more** link on the **Mobile Registration** page (Profile > Mobile Registration) in the web version of Concur  
– or –

- In online help in the web version of Concur; Travel or Expense users can access the information in the left menu of the help window  
– or –
- Concur Client Central (Resources > Document Library > Concur mobile app)

**3. How much information can be edited by the user?**

All users (iPhone/iPad/iPod touch, Android, and BlackBerry) can edit report header fields and most expense fields after the expense is attached to a report. When using lists, the same list data is available on the mobile device as is available in the web version of Expense.

**4. Can a user itemize an expense using the mobile app?**

All users (iPhone/iPad/iPod touch, Android, and BlackBerry) can itemize an expense (after the expense is added to a report).

**5. Can a user add attendees using the mobile app?**

The user can add attendees to an expense **after** the expense is added to a report.

Method	iPhone/iPad/iPod touch	Android	BlackBerry
Use the <i>bump</i> feature	✓		
Search the user's contact list on the mobile device	✓	✓	✓
Search for attendees in the user's <i>favorites</i> attendee list	✓	✓	✓
Search for attendees in all company attendee lists	✓	✓	✓
Add the attendee manually	✓	✓	✓

**6. How is a *quick* expense different from a *regular* expense – an expense entered using the web version of Concur?**

A mobile user can create a "quick" expense (which contains basic information such as date, amount, and expense type) and attach an image of the receipt. More intricate expenses – with attendees, car mileage, and itemizations – can be added to an expense that is already added to a report.

## 7. Can a user delete expenses using a mobile device?

That depends.

- **Deleting an expense from the expense list:** The expense list contains Quick Expenses (expenses created on the mobile device) and card transactions.
  - ◆ A user can delete a Quick Expense.
  - ◆ Depending on the device, users may be able to delete card transactions. In some cases, the user must access the web version of Concur to complete this task - assuming that the user's company allows its users to delete card transactions.
- **Deleting an expense from an expense report:** A report may contain all kinds of expenses.
  - ◆ If the user deletes a Quick Expense or a card transaction from an expense report, it is not really deleted; it is moved back to the pool of expenses on the **Expenses** screen (the expense list).
  - ◆ If the user deletes any other type of expense from an expense report, it is truly deleted. (This is consistent with the web version of Expense.)

## 8. How does a user delete a Quick (mobile) Expense?

A mobile expense can be deleted only on the mobile device itself from the **Expenses** screen (the expense list). Once deleted from the mobile device, it will no longer appear online or be available for import into an expense report.

If a user deletes an expense in the web version of Concur and that expense was originally a Quick Expense – that expense is not deleted from the system – instead, it moves back to the "pool" of Quick Expenses on the user's device. The user must then delete it using the mobile device.

## 9. Can my delegate manage my expenses and reports via the mobile app?

The mobile app does not support delegates or proxies.

## 10. Do all expenses entered on the mobile device appear with the purple smartphone icon when viewed in the web version of Expense?

No. Only Quick Expenses will have the icon. Expenses added to an open report will not have the icon. Quick Expenses usually contain minimal information; the icon could remind the user to add any missing information.

**11. Do expense types have to be mapped for the mobile app? Are there defined expense types in the mobile app that need to be mapped to the client's configuration?**

No. By default, the expense types used for the mobile app are the same as the expense types used in the full-featured, web version of Concur. However, the full list of expense types may be cumbersome so the client may want to shorten the list for mobile users.

To do so, the client opens a service request with Concur Client Support.

**12. Does everything in a client's configuration appear on the mobile device (for example, vendor lists or attendee lists)?**

Lists are generally available but some parts of the configuration (such as travel allowances) are not currently available in the mobile app. The user enters that information once the mobile expenses are imported into an expense report in the web version of Concur.

**13. Can a user capture an image of the receipt and attach the image to the expense?**

Yes. All receipt images, captured by the mobile device's camera, will upload into Travel & Expense immediately or the next time the mobile app connects to the Internet. Once the digital image is imported into an expense report, the receipt image is treated like other receipt images and can be viewed (in a PDF viewer) by the user, approver, and processor.

**14. Does a digital photo of a receipt meet IRS guidelines for expense documentation?**

Yes.

**15. BlackBerry – Does the user need any special settings to use the BlackBerry camera for receipts?**

In the camera options:

- The picture size should be set to medium (1024 x 768) or smaller.
- The picture quality should be set to normal.

The user should refer to the owner guide for information about accessing these settings.

**16. iPhone/iPad/iPod Touch – Does it take a long time to upload the receipt images?**

When you take a receipt image and attach it to either an expense or report header, Concur will compress the image. This increases the performance of loading receipt images and reduces the file size by automatically resizing the image. The image quality is retained while performance is enhanced.

**17. BlackBerry – Does a user or an approver need any special settings to view receipt images?**

Occasionally, with a BlackBerry, the image details are not initially very clear. The user can improve the view by selecting the BlackBerry menu while viewing the image and then use the option to zoom in/out or to change the view to page view, column view, or desktop view. (View options differ by model.)

**18. What functionality is available for Expense managers with regards to expense report approval?**

Approvers can view employee expense reports including expense detail, report header information, receipt images, attendees, itemizations, and exceptions. Managers can approve or reject the *entire* expense report from their mobile device. (Just like the web version, managers must enter a comment when rejecting a report.)

Managers cannot, however, adjust expense amounts. That task must be done using the web version of Concur. (This is assuming that the company's configuration allows approvers to adjust amounts).

**19. Are all Expense approval workflows available in the mobile app?**

Concur's mobile app does not currently support dynamic workflow. If an approver needs to select the next approver, he/she will see a message that the mobile app does not support this workflow; therefore, the report must be approved using the web version of Concur.

If the web version of Expense is configured so that the user can select his/her approver on submit, then the user can do the same using the mobile app. However, the approver cannot select a different approver.

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## Travel

### **1. With Concur's mobile app, can a traveler manage his/her trip itinerary?**

A traveler can view his/her itineraries, with details about flights, hotels, rental cars, vendors, and maps.

All smartphone users can search for and book rental car, hotel, and Amtrak.

iPhone/iPad/iPod touch and Android can search for and book a flight.

Note the following:

- BlackBerry users cannot yet book a flight. This feature will be added in an upcoming release.
- iPhone/iPad/iPod touch and Android users cannot book flights if the feature is deactivated by the company's TMC.
- iPhone/iPad/iPod touch and Android users cannot book flights if air-related custom dynamic fields (configured as *if/then*) are configured for the company. This restriction will be eliminated in a future release.

Also, depending on the type of smart phone, there are third-party apps available. Using these apps, the user may also be able to book taxi, dining, and public transportation.

### **2. Can a traveler book airfare using the mobile app?**

On the iPhone/iPad/iPod touch and Android, the user can book flights.

### **3. Will a client incur a charge by using the mobile app?**

If a traveler appends an existing itinerary by adding a hotel or car reservation through Concur's mobile app, there is not an additional booking fee applied.

### **4. Can a traveler change his/her itinerary?**

Yes. A traveler can change his/her itinerary such as add or cancel dining (depending on the device), hotels, taxis, or rental cars. Flight information cannot be changed using the mobile app.

### **5. Can a traveler manage his/her hotel reservations?**

Yes. The traveler can book hotel from the home page or from an existing itinerary.

Either way, the search results include rates, images, descriptions, cancellation policy, star rankings, maps, hotel policy, and hotel facilities.

## **6. Can a traveler see hotel properties that are company-preferred?**

Yes. A maximum of 30 results are returned, sorted as follows:

- First: All company-preferred properties sorted by preference level, and then secondary sorted by distance
- Next: All properties that are not company-preferred but have rooms in compliance, and then secondary sorted by distance (Note that these properties may also have non-compliant rooms)
- Next: All properties that are not company approved and have no rooms in compliance, and then secondary sorted by distance

For the iPhone / iPad / iPod touch and Android, the **Load more hotels** link appears after the first 30 hotel search results. The user can click that link to access more results.

## **7. Can a traveler see hotel properties that support e-receipts?**

No.

## **8. If a traveler books a hotel room after business hours but the traveler's manager is not available to approve the reservation, will the reservation be confirmed?**

If the client's workflow does not allow a traveler to book a hotel without manager approval, the traveler must contact the hotel or travel agent directly.

## **9. Can a traveler manage his/her ground transportation?**

Yes. A traveler can book ground transportation by renting a car or booking a local taxi. The traveler receives a car confirmation and an updated itinerary (if applicable).

## **10. What about public transportation?**

On the iPhone/iPad/iPod touch and BlackBerry, users can locate public transportation using the mobile device. The first step is to download the MetrO app, using the link provided on the mobile device. The traveler selects the desired city and then enters the criteria. Public transportation options are provided.

## **11. How does a traveler rent a car?**

The traveler can rent a car from the home page or from an existing itinerary.

Either way, the search results provide a list of available cars, rates, images, and vendor phone numbers.

## 12. How does a traveler reserve a taxi?

The first step is to download the Taxi Magic (RideCharge) app, using the link provided on the mobile device. The traveler enters the search criteria and selects the appropriate ride.

If the traveler has set up his/her Taxi Magic account in the web version of Concur, the taxi reservation will appear on both the web version and the mobile under **Trips**.

## 13. Must a traveler use Travel in order to pay for a taxi using his/her mobile device?

No.

## 14. Does the mobile app use GPS for dining reservations?

The mobile BlackBerry app uses leading dining application such as OpenTable. This application makes use of the user's location to improve the search experience.

## 15. Will GPS information be available on all mobile devices?

The GPS capability depends on the device **and** provider.

If a client is having issues with GPS, there are several troubleshooting steps that the user should take:

- First, does the user have a third-party mapping application like Google Maps installed?
  - ◆ If so, does it recognize the user's GPS?
  - ◆ If not, then the user's mobile device may not have GPS.

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**NOTE:** In some office buildings, GPS signal is too weak to determine location. The user should stand by a window or go outside to test it.

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- If the device is a Verizon phone, note that Verizon has locked the GPS on many models so that it works **only** with Verizon VZNavigator. However, Verizon has recently published ROM updates that unlock some of their premium models, including the HTC Touch Pro, Samsung Saga, Samsung Omnia i910, BlackBerry Pearl 8339, and BlackBerry Curve 8130.

**Note that updating the ROM on a device may remove all of the user's contacts, email messages, and other data.**

For more information, the user must contact Verizon directly.

## 16. What functionality is available for travel Managers with regards to trip approval?

BlackBerry users can approve trips. This functionality is coming soon to the other mobile devices.

**17.What corporate card information is stored on the Mobile device?**

The **only** piece of card information that is held on the mobile device is the name the user has set up for the corporate card (in Profile in the web version of Concur) and the last 4 digits. The full card number is never displayed on the device.

**18.If my company uses a ghost card, can I use it for the mobile app?**

Yes. It will be presented to you as a form of payment. You can use it or any other card that is listed in your profile.

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**NOTE:** A *ghost* card is a specific type of company credit card.

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**19.My company uses only ghost cards for booking travel. Can a traveler book travel if only a ghost card is available?**

Yes.

**20.Sometimes, a TMC can affect a client's ability to use a feature. For instance, if a TMC partner does not support a particular feature, then that feature is not available to the client. Is this the case with the mobile app?**

The only feature that TMCs can affect is the ability to book flight if the TMC uses Sabre.

TMCs can enable non-Concur clients to use Concur's mobile app by sending itineraries to Concur's itinerary database using web services. For additional information about web services, refer to Concur Client Central.

**21.Does the mobile app allow the traveler to view weather conditions at their final destination?**

Only by viewing the weather apps on the mobile device

**22.Does the mobile app support custom trip fields?**

The mobile app currently does support entering static custom trip fields. If a client has dynamic (*if/then*) custom trip fields, the user will not be able to book stand-alone air, hotel, car, or rail. If the user has an existing flight trip that was booked via the web version of Concur, the user can add hotel or car to it since the trip fields were already completed.

**23.Do mobile bookings that require manager approval trigger the approval email?**

The trip will be flagged for approval and placed in the approval queue but the manager will not receive an approval email.

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## **Payment Requests (Concur's invoice management service)**

### **1. Which Invoice features are available using Concur's mobile app?**

On the iPhone / iPod touch and BlackBerry, a Payment Approver can use Concur's mobile app to view line items, header information, vendor information, and images. The approver can then approve the payment request or send it back to the invoice owner. Additional features will be added over time.

### **2. Can the approver do anything else?**

The approver can also use the mobile device to search for, book, and cancel taxi and dining on the device.