

# Microsoft Dynamics 365

For Finance and Operations

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**WIPFLi**  
BRITTENFORD SYSTEMS

**For Microsoft Dynamics 365 Finance &  
Operations**

**User Instructions**

## Contents

Overview .....	2
Prerequisites .....	2
Permissions .....	2
FO .....	2
Concur .....	2
FO Installation into a testing environment .....	3
AX migration from testing to live .....	4
Concur Installation .....	4
ExpenseConnect configuration in FO .....	5
Installation media .....	9
ExpenseConnect Security .....	9
FO Windows and Forms permissions for ExpenseConnect .....	9
Concur Site Overrides (Implementation sites) .....	10
ExpenseConnect Features .....	11
Batches .....	11
Payment Statuses .....	12
Scheduling Batches .....	13
Debugging Validation Errors .....	15
Transaction Splitting .....	16
Ledger Journal .....	16
Ledger Journal Voucher .....	16
Field Mapping .....	16
Value Transformations .....	18
Concur Extract .....	19
Receipt Images .....	20
Current Limitations .....	21
Marking integrated reports as “Paid” back into Concur .....	21
Cash Advances .....	21
Wipfli Support .....	21

## Overview

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ExpenseConnect is an integration application that integrates expense reports from Concur into Microsoft Dynamics D365 Finance and Operations (FO). With ExpenseConnect, companies using both Concur and FO can integrate expenses into FO into the FO general journal. ExpenseConnect reports come directly from Concur without any user intervention using the Concur Application Programming Interface (API) option and Dynamics FO managed interop. Refer to this document for the installation, usage, and definitions of ExpenseConnect.

## Prerequisites

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### Permissions

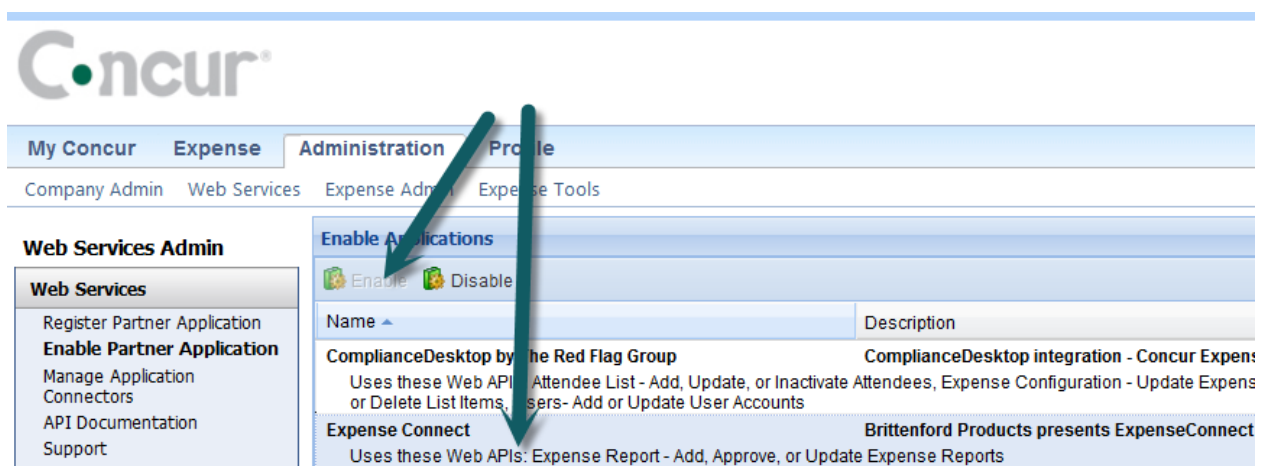
#### FO

Make sure you have access to the Asset Library in Lifecycle Services (LCS).

#### Concur

To create a token, the Concur user needs access to view and modify all reports company-wide and access to enable Expense & Invoice Connect by Brittenford via Administration → Web Services → Enable Partner Application. They will also need:

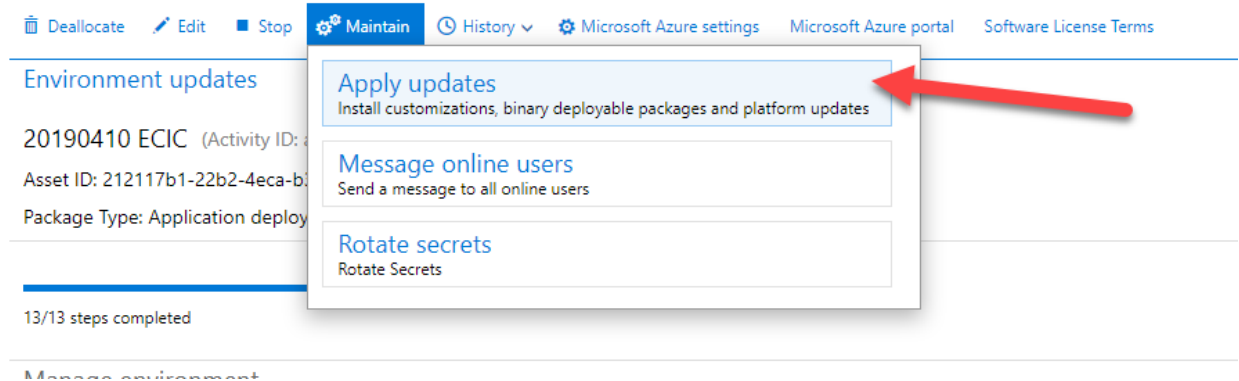
1. For Concur Standard Edition:
  - a. The “Can Administer” checkbox selected in their user account
  - b. The “Can Approve” checkbox selected in their user account
  - c. The “Can Submit” checkbox selected in their user account
2. For Concur Advanced Configurations:
  - a. The “Web Services” role added to their user account
  - b. The “Expense User” checkbox selected in their user account



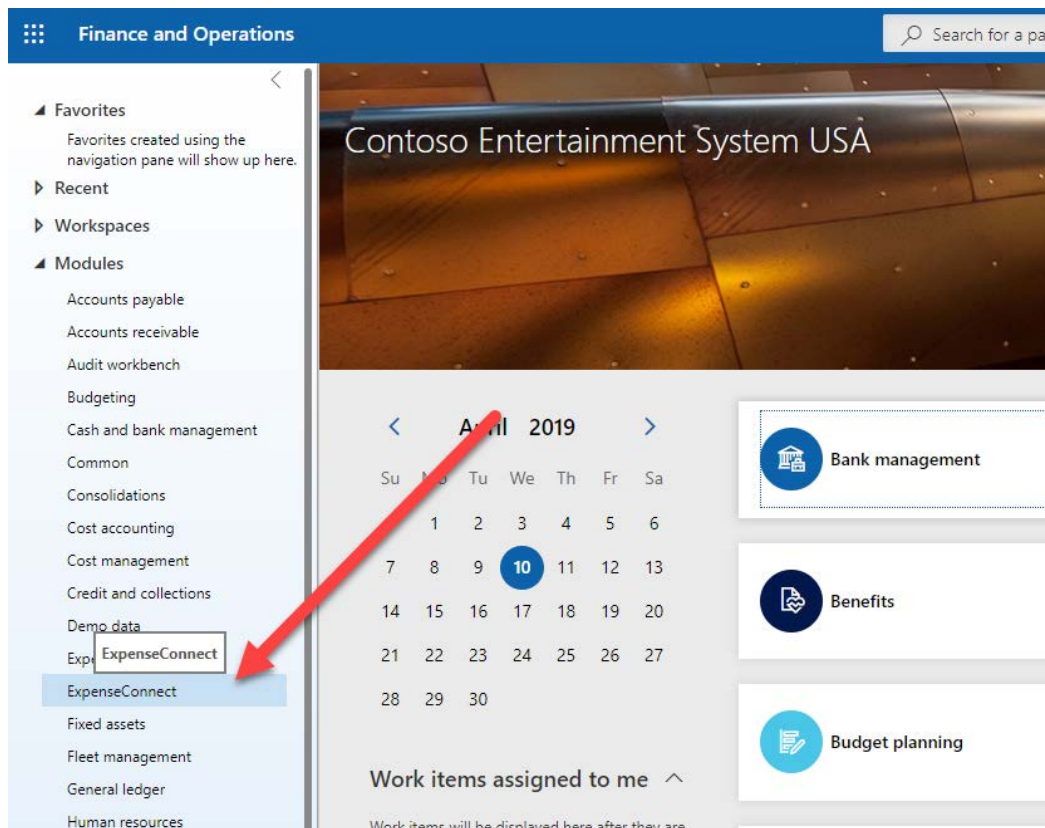
## FO Installation into a testing environment

1. Take the deployment zip file given to you by your Wipfli implementation specialist and import it into your LCS Asset Library
2. In LCS, go into the environment to update, start it (if necessary), and click on Maintain → Apply Updates

### ConcurConnectDemo



3. Find the deployment artifact and click Apply
4. Once the installation is over, you can login to the environment and see ExpenseConnect in the menu



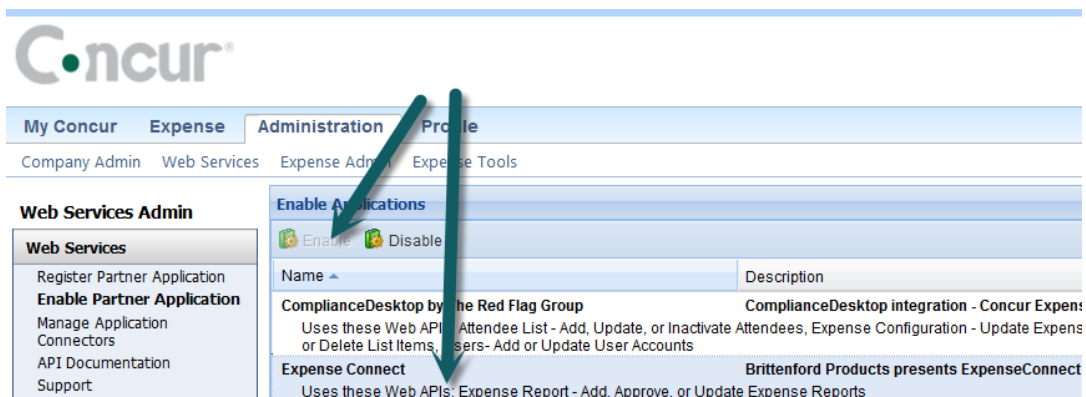
## AX migration from testing to live

Steps in **bold** are steps that the client or client's AX partner is responsible for taking care of. Wipfli or the client can take care of the other steps.

1. Export out your field mappings, value transformations, and Concur extracts from the forms in the testing environment
2. Follow the same installation instructions from above
3. Re-apply your API Key, start date (and other settings), field mappings, value transformations, and Concur extracts into your live environment
4. Recreate a Concur token in your live environment

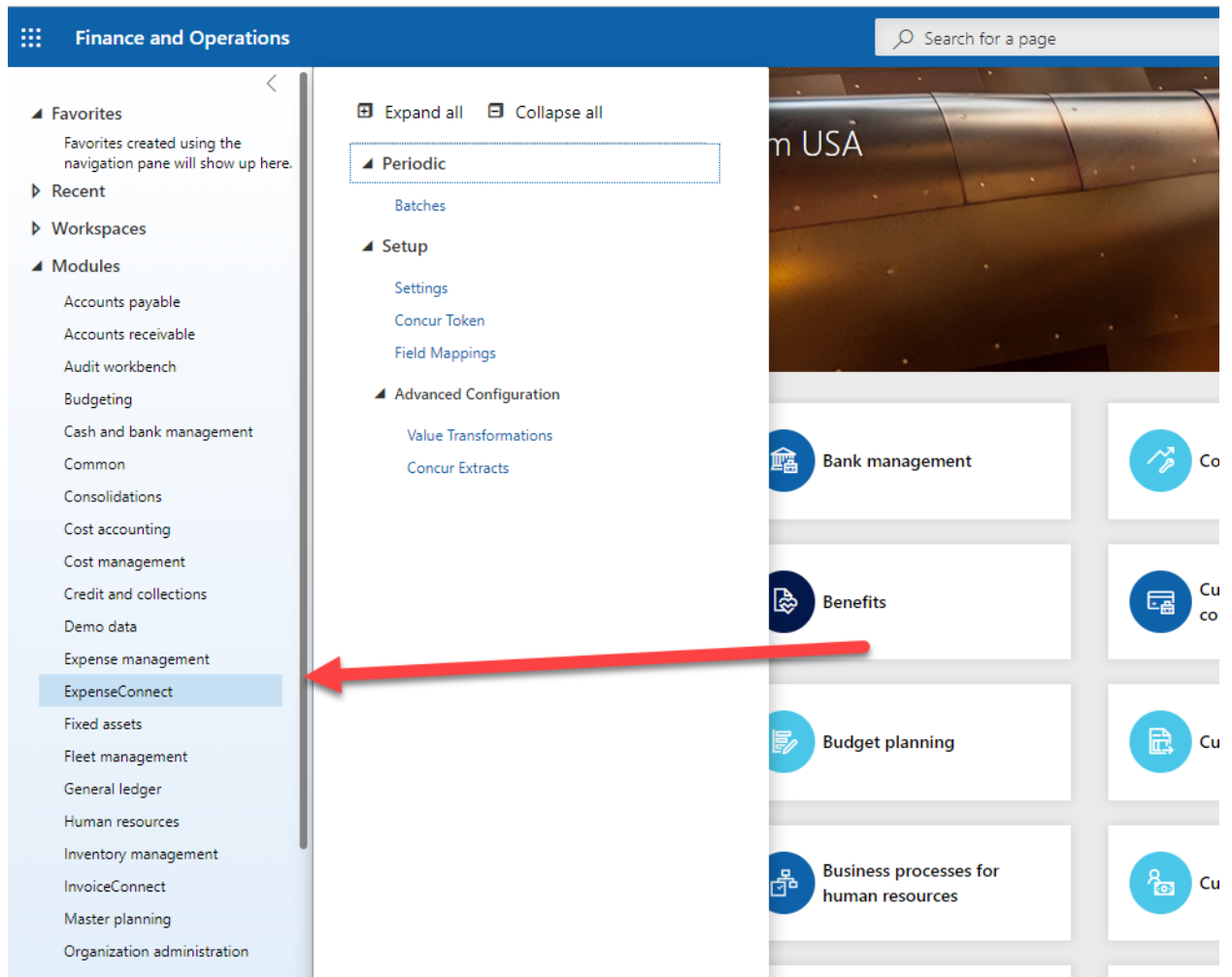
## Concur Installation

1. Logon to Concur using the newly created wsadmin account.
2. Enable the application in Concur (Administration → Web Services → Enable Partner Application)
  - a. Select the Expense & Invoice Connect by Brittenford entry
  - b. Select the Enable button

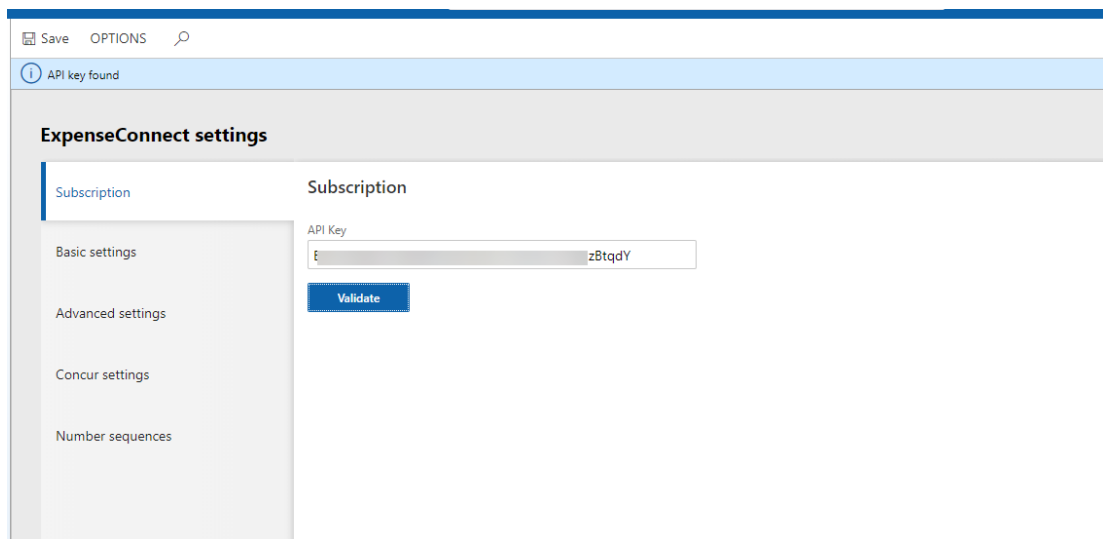


## ExpenseConnect configuration in FO

1. In FO, navigate to the ExpenseConnect home page using the navigation pane.



2. Open the Settings form and enter in the API Key provided by Wipfli to register the application. Click Validate to test it.



Save OPTIONS

API key found

### ExpenseConnect settings

Subscription

Subscription

API Key

zBtqdY

Validate

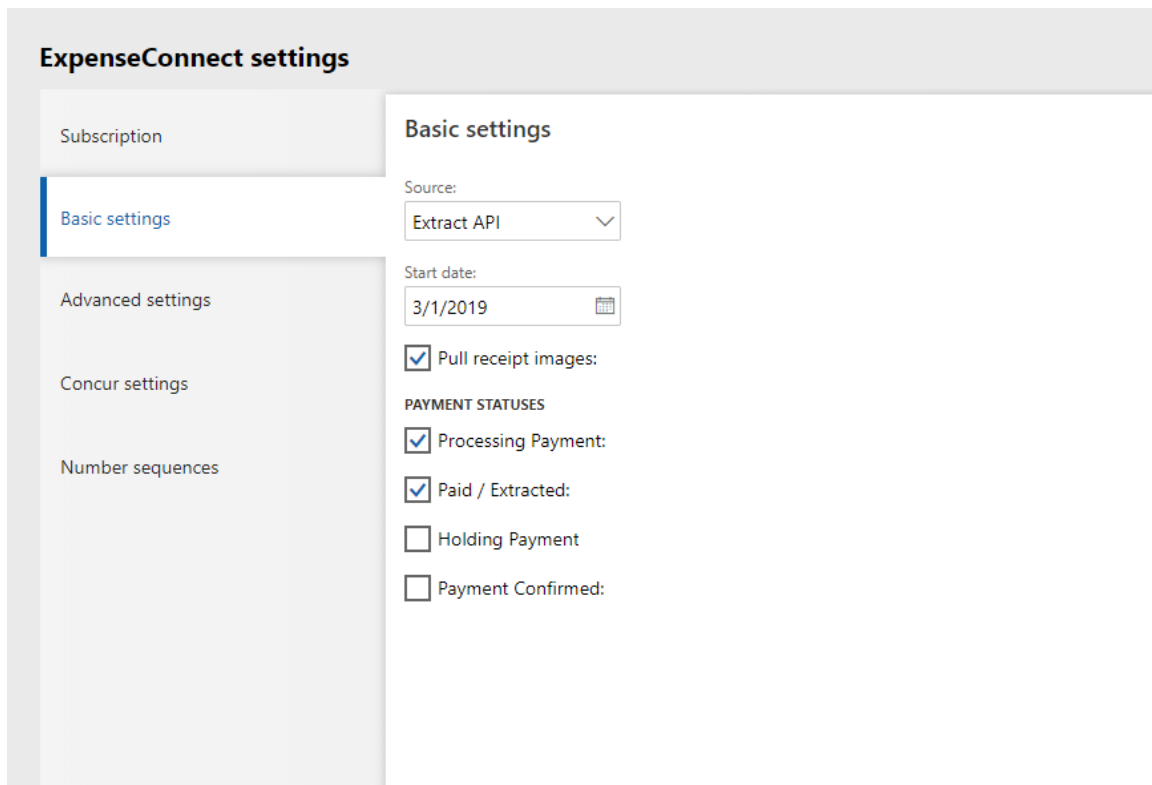
Basic settings

Advanced settings

Concur settings

Number sequences

- Under Basic Settings select a Start Date and Payment Statuses. These choices determine how far back to look for reports and which Concur Payment Status(es) reports need to be in for the connector to pull them.



### ExpenseConnect settings

Subscription

Basic settings

Advanced settings

Concur settings

Number sequences

Source:

Extract API

Start date:

3/1/2019

☒ Pull receipt images:

**PAYMENT STATUSES**

☒ Processing Payment:

☒ Paid / Extracted:

☐ Holding Payment

☐ Payment Confirmed:

4. Open the Concur Token form and use the "WS Admin" Username and Password to Create a new token. After hitting Create Token, if a token is successfully created, you will see it in the Token textbox.

Save | Delete | OPTIONS

### ExpenseConnect Concur Token

[Refresh Token](#)

Username:

Password:

[Create Token](#)

Token:

Instance url:

Expiration date:

Refresh token:



5. Open the Field Mappings form to import the default field mappings provided by Wipfli. Edit the field mappings according to the company's need.

EXPENSECONNECT FIELD MAPPINGS

Switch destination:  
Ledger Journal Transaction

AX fieldname	Concur fieldname
UserDefined1	19
Credit Company	'USMF'
Amount	169
Currency Code	'USD'
Expense Account Type	'Project'
Expense Dimension 1	'000057'
Employee Credit Account Type	'Vend'
Employee Credit Dimension 1	56
Company Credit Account Type	'Vend'
Company Credit Dimension 1	56
Quantity	'1'
Description	69
Credit Description	27
Credit Method Of Payment	'CHECK'
Invoice Number	19
Project Date	Today
Project	'000057'
Project Category	'Meal'
Project Line Property	'NonBill'
Approver	'000001'

API Levels

User profile: No ☐

Report details: No ☐

Report owner: No ☐

Card transaction: No ☐

Expense entry: No ☐

Itemization: No ☐

Allocation: No ☐

Journal entry: No ☐

VAT data: No ☐

List object

List object: ☒ Code ☐ Value

6. Open the ExpenseConnect Batches form. You are now ready to test a batch. Start a batch by clicking the Process button. It should pull all the reports going back as far as the Settings Start Date for the Payment Status(es) selected in Settings.

EXPENSECONNECT BATCH

Process date: 4/10/2019

Batch ID: BEC-0000045 Created at: 4/10/2019 05:53:33 PM Process date: 4/1/2019 Status: Successful

Message: 8 Successful reports

Batch ID	Created at	Status	Message
BEC-0000045	4/10/2019	Successful	8 Successful reports
BEC-0000044	4/9/2019	Successful	1 Successful report
BEC-0000043	4/9/2019	Validation Errors	0 Successful reports, 11 Failed re...
BEC-0000040	4/9/2019	Validation Errors	11 Successful reports
BEC-0000039	4/9/2019	Exception	Nullable object must have a val...
BEC-0000038	4/4/2019	Exception	Nullable object must have a val...
BEC-0000037	4/3/2019	Exception	Nullable object must have a val...
BEC-0000036	3/29/2019	Successful	0 Successful reports
BEC-0000035	3/28/2019	Successful	1 Successful report
BEC-0000028	3/28/2019	Validation Errors	0 Successful reports, 1 Failed re...
BEC-0000013	3/21/2019	Validation Errors	1 Successful report
BEC-0000012	3/21/2019	Exception	Inserting Ledger Journal Vouche...
BEC-0000011	3/21/2019	Exception	1 Successful report
BEC-0000010	3/21/2019	Validation Errors	1 Successful report
BEC-0000009	3/21/2019	Validation Errors	0 Successful reports, 1 Failed re...
BEC-0000006	3/21/2019	Validation Errors	0 Successful reports, 1 Failed re...
BEC-0000005	3/21/2019	Validation Errors	0 Successful reports, 1 Failed re...
BEC-0000004	3/21/2019	Validation Errors	0 Successful reports, 1 Failed re...
BEC-0000003	3/21/2019	Validation Errors	0 Successful reports, 1 Failed re...

Overview

Report number	Description	Success	Voucher ID	Com...	Additional Info
1	Cash only	<input checked="" type="checkbox"/>	APIN000100	USMF	1967
2	Cash & CC	<input checked="" type="checkbox"/>	APIN000101	USMF	1967
3	Tax Hotel	<input checked="" type="checkbox"/>	APIN000102	USMF	1967
4	Cash w/o tax	<input checked="" type="checkbox"/>	APIN000103	USMF	1967
5	Cash w taxes	<input checked="" type="checkbox"/>	APIN000104	USMF	1967
6	Credito	<input checked="" type="checkbox"/>	APIN000105	USMF	1967
7	repor	<input checked="" type="checkbox"/>	APIN000106	USMF	1967

System

Report number	Description	Record-ID	Concur Report Number
1	Cash only	5637147576	A56D0858F22A4814922D-APInvoice-USD-USMF-

## Installation media

The latest installation media is found here:

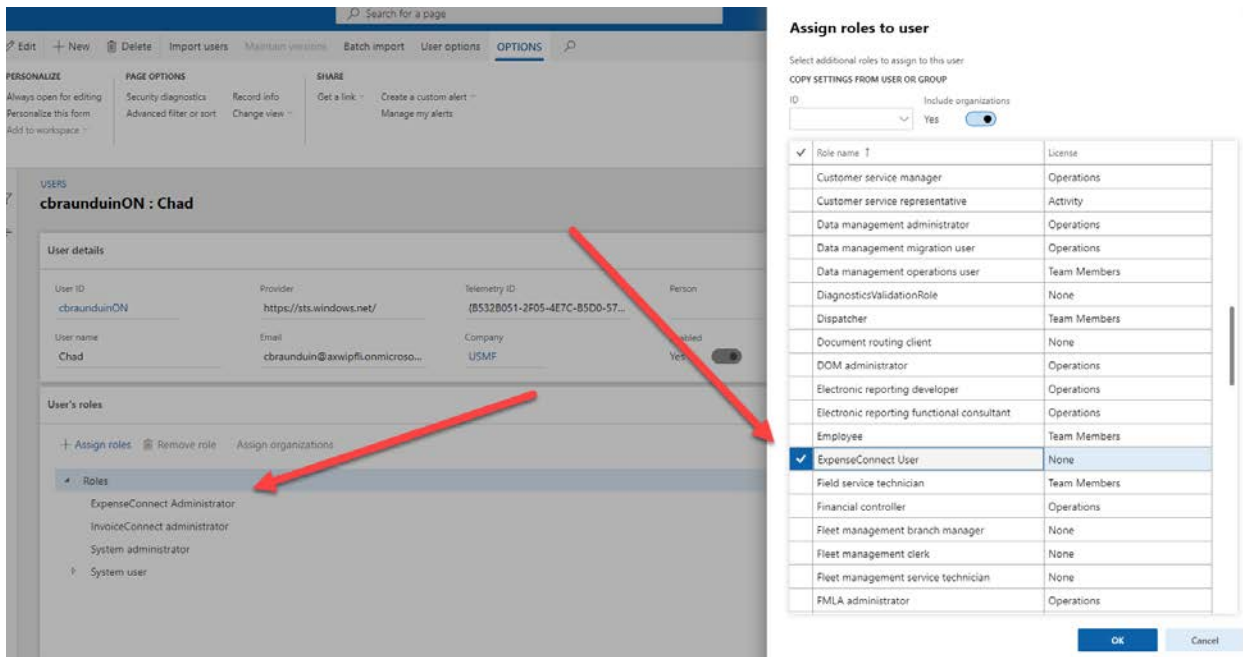
<https://brittip.blob.core.windows.net/ecfo/EC-AXDeployablePackage.zip>

## ExpenseConnect Security

The token used to access the Concur API is stored internally and all programmatic requests between Concur and ExpenseConnect are encrypted (HTTPS), so the token is never seen nor handled as plain text.

## FO Windows and Forms permissions for ExpenseConnect

Assign each user of ExpenseConnect either the ExpenseConnect Administrator role of the ExpenseConnect User role. The Administrator role can do everything within ExpenseConnect. The User role can only run EC Batches.



**Assign roles to user**

Select additional roles to assign to this user.  
COPY SETTINGS FROM USER OR GROUP

ID:  Include organizations: ☐

Role name	License
Customer service manager	Operations
Customer service representative	Activity
Data management administrator	Operations
Data management migration user	Operations
Data management operations user	Team Members
DiagnosticsValidationRole	None
Dispatcher	Team Members
Document routing client	None
DOM administrator	Operations
Electronic reporting developer	Operations
Electronic reporting functional consultant	Operations
Employee	Team Members
<input checked="" type="checkbox"/> ExpenseConnect User	None
Field service technician	Team Members
Financial controller	Operations
Fleet management branch manager	None
Fleet management clerk	None
Fleet management service technician	None
FMLA administrator	Operations

OK Cancel

## Concur Site Overrides (Implementation sites)

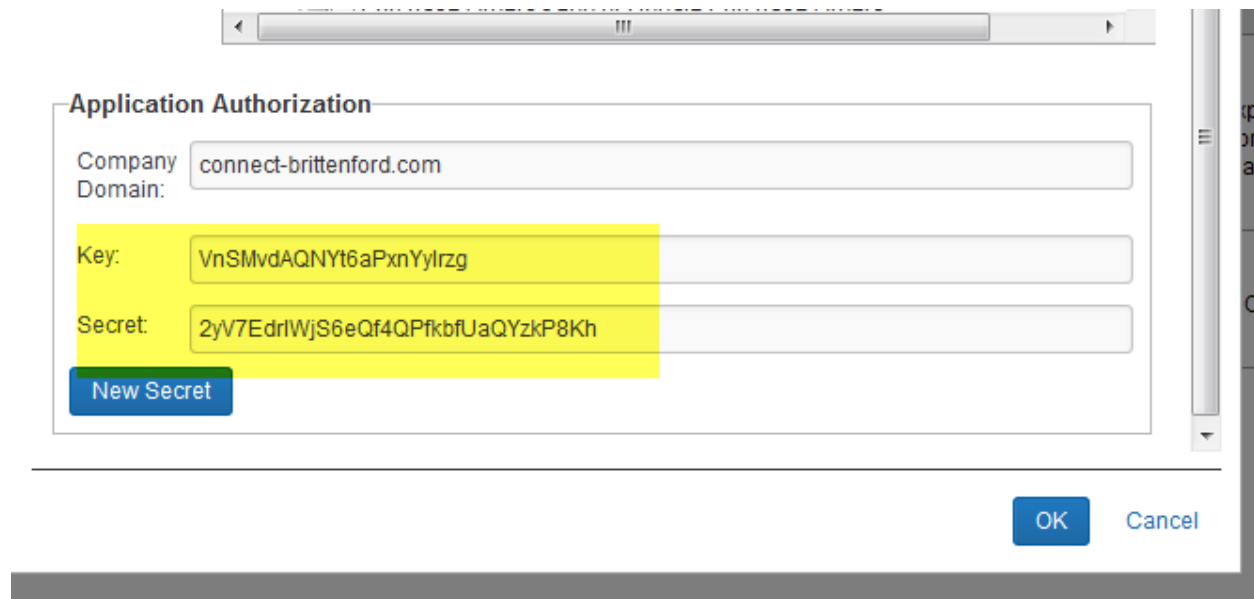
If the Concur domain differs from [www.concursolutions.com](http://www.concursolutions.com) (the default for production Concur sites), the domain needs overridden in the Settings form → Concur settings tab.

If ExpenseConnect is implemented in a Concur implementation site, the Concur Key and Concur Secret fields need overridden. Obtain the Key and Secret fields after registering a new partner application in the Concur implementation site at Administration → Company → Web Services.

Choose an appropriate name and description, and select the following boxes:

- Expense Report
- Extract
- List Items
- Users

Scroll to the bottom and copy-and-paste the Key and Secret into the corresponding fields in the form.



**Application Authorization**

Company Domain:

Key:

Secret:

Save OPTIONS

### ExpenseConnect settings

Subscription

Basic settings

Advanced settings

**Concur settings**

Number sequences

**Concur settings**

Refresh token:  
Yes ☒

Group config ID(s):

Concur chunk size:

Concur domain:

Concur key:

Concur secret:

Renew the Concur token using the Concur Token form.

## ExpenseConnect Features

### Batches

Batches store a log of the integrations performed between Concur and FO along with a list off all the Concur reports integrated. During production, it is important not to delete Batches from ExpenseConnect because ExpenseConnect uses existing Batches in two ways:

1. ExpenseConnect uses the Created Date and Time of the last fully successful Batch as the Start Date of the next Batch. A Batch is considered fully successful only if all reports successfully integrate.
2. ExpenseConnect prevents duplicate integrations by checking the existing Batch Report lists before integrating a report.

When first creating a Batch, there is an editable field called the Process date that defaults to today's date. By changing the date field, ExpenseConnect imports a Batch at an earlier or later date. For example, if reports need imported on the last day of the month, but the last day of the month falls on a Sunday, the reports can be run on the following Monday by changing the Current Date to Sunday's date.

If a report will not integrate, prevent ExpenseConnect from continuing to try to integrate the report by selecting the "Success" checkbox. In production, it is best to find the root cause of a report not integrating before choosing to skip reports.

The screenshot displays the 'EXPENSECONNECT BATCH' interface. On the left, a table lists various batches with columns for Batch ID, Created at, Status, and Message. Batch BEC-0000043 is selected. On the right, the 'Overview' section shows details for this batch, including 'Batch ID', 'Created at', 'Process date', and 'Status'. Below this, the 'Report Details' table lists individual reports with columns for Report number, Description, Success, Voucher ID, Com., and Additional Info. A red arrow points to the 'Success' checkbox for Report 1, 'Cash&CreditCard'.

Batch ID	Created at	Process date	Status
BEC-0000043	4/9/2019 05:06:44 PM	4/9/2019	Validation Errors

Report number	Description	Success	Voucher ID	Com.	Additional Info
1	Cash&CreditCard	<input type="checkbox"/>		U1SM	1963
2	Amex&Cash	<input type="checkbox"/>		U1SM	1963
3	ProjectBilling	<input type="checkbox"/>		U1SM	1963
4	ProjectBillingAmex	<input type="checkbox"/>		U1SM	1963
5	Taxes	<input type="checkbox"/>		U1SM	1963
6	Trip Montana	<input type="checkbox"/>		U1SM	1962
7	CC auto	<input type="checkbox"/>		U1SM	1963

### Payment Statuses

It is possible to configure ExpenseConnect to integrate reports from four different Concur payment statuses:

- Processing Payment
- Paid / Extracted for Payment
- Holding Payment
- Payment Confirmed

With the box selected for one of these statuses in the Settings form, ExpenseConnect integrates all of the reports transferred to that status on or after the date of the last fully successful batch.

### ***Scheduling Batches***


To schedule batches to run automatically, open the Batches form and click on the Schedule Run button. That will open a scheduler setup form. The important choices to make on this form are:

1. What value will populate in the Processing Date field. There are 4 choices that should be selected based on accounting need
2. Select Yes for Batch Processing
3. Click on the Recurrence link to configure when the schedule will run

## ExpenseConnect Batch Run Setup

### Parameters

Processing Date Default

First Date of Current Month 

### Run in the background

Recurrence

Alerts

Batch processing

Yes



Task description

ExpenseConnect Batch

Batch group



Private

No



Critical Job

No



Monitoring category



Start date: 4/10/2019 (07:33:13 pm) (GMT) Coordinated Universal Time

OK

Cancel

**Debugging Validation Errors**

Sometimes Concur expense reports fail to integrate when data they contain is not valid. The main causes are:

- An invalid Ledger account of dimension
- An invalid Ledger name
- A Transaction date in a closed period

When this happens, it is important to know how to debug those validation issues. First, identify which report caused the error. Sometimes identification can be a multi-step process.

**Step 1: Open the Error Log to identify the problem**

The screenshot shows the SAP Concur ExpenseConnect interface. At the top, there is a menu bar with options: Save, Delete, Process, Refresh, Error log, Schedule Run, and OPTIONS. Below the menu, there are three yellow warning messages: "Stack trace: The company U1SM does not exist.", "Cash&CreditCard: Company 'u1sm' is not a valid company", and "Cash&CreditCard: Company 'U1SM' is not a valid company". A red arrow points to the "Error log" menu item. Below the warnings, there is a table with columns: Batch ID, Created at, Status, and Message. The table lists several batches, with the batch BEC-0000043 highlighted in blue. A red arrow points to the "Report Details" button in the right-hand pane. The right-hand pane shows the "Report Details" for the selected batch, with a table listing report numbers, descriptions, success status, voucher IDs, and additional info. The table includes reports for "Cash&CreditCard", "Amex&Cash", "ProjectBilling", "ProjectBillingAmex", "Taxes", and "Trip Montana".

Step 2: Find the Report Details for an offending report by clicking on the Report Details button. This gives us all of the data pulled from Concur. Open it in an XML viewer (e.g. Internet Explorer, Notepad).

The screenshot shows the SAP Concur ExpenseConnect interface, similar to the previous one. The "Error log" menu item is still highlighted. The table of batches is the same. The right-hand pane shows the "Report Details" for the selected batch, with a table listing report numbers, descriptions, success status, voucher IDs, and additional info. The table includes reports for "Cash&CreditCard", "Amex&Cash", "ProjectBilling", "ProjectBillingAmex", "Taxes", and "Trip Montana". A red arrow points to the "Report Details" button in the right-hand pane.



Step 3: After identifying the issue, fix the issue in either Concur or FO (whichever is more appropriate), and re-run another batch

### Transaction Splitting

In the course of integrating expense reports into FO, reports split into different FO journals and vouchers.

#### *Ledger Journal*

Journal records split because of the following differences:

- LedgerName
- Currency Code
- Company ID

#### *Ledger Journal Voucher*

Vouchers split for the following differences:

- Credit Dimension Ledger Account
- Transaction Date
- Exchange Rate
- Extra Grouping Key (A pseudo field which can cause vouchers to split if desired)

### Field Mapping

Values in Concur map to fields in FO via entries in the Field Mappings ExpenseConnect form. There are a few rules to follow when mapping fields.

- Using the Expense API, Concur fields map by entering the exact (case-sensitive) fieldname into the Concur Fieldname field. Example: ReportName
- Using the Extract API, Concur fields map by entering the 1-based ordinal of which column number they are in the file. Example: 19
- Map literal values by enclosing them with single quotes. Example: 'EC'
- Fields concatenate together by delimiting them with an ampersand or comma. Using a comma puts a space in between the fields whereas using an ampersand does not include a space.
  - Example: ExpenseTypeName,Amount (produces: Lunch 15.46)
  - Example: 'EC- '&ReportKey (produces: EC-2883)
- Custom fields in Concur are not just straight values. They are XML elements, which have sub-elements of "Code" and "Value". Use the List Object field to select which of these to use. Code is the most common choice.
- It is possible to map a value from a specific level(s) of the Concur API response. This is sometimes necessary if, for example, the field Custom1 contains project values in the

ExpenseEntry section but department values in the Allocation section. If project values need mapping, edit the mapping record by selecting the appropriate API level(s).

In the screenshot below, the description will only be pulled from the Report details and Expense entry sections. The other sections will be skipped.

AX fieldname	Concur fieldname
✓ UserDefined1	19
Credit Company	'USMF'
Amount	169
Currency Code	'USD'
Expense Account Type	'Project'
Expense Dimension 1	'000057'
Employee Credit Account Type	'Vend'
✓ Employee Credit Dimension 1	56
Company Credit Account Type	'Vend'
Company Credit Dimension 1	56
Quantity	'1'
Description	69
Credit Description	27
Credit Method Of Payment	'CHECK'
Invoice Number	19
Project Date	Today
Project	'000057'
Project Category	'Meal'
Project Line Property	'NonBill'
Approver	'000001'

**API Levels**

User profile: No ☐

Report details: Yes ☒

Report owner: No ☐

Card transaction: No ☐

Expense entry: Yes ☒

Itemization: No ☐

Allocation: No ☐

Journal entry: No ☐

VAT data: No ☐

**list object**

List object: ☐ Code ☐ Value

- It is also possible to map conditionals. In the example below, ExpenseConnect first finds the value of the Concur field PayeePaymentTypeName. If that value is "Employee", it returns the value of the Concur field ExpenseTypeName, otherwise it returns the literal value 'Other'. In this example, 'Other' is the default value because it has a blank conditional check. As many conditionals as needed may be used. The pipe character ( | ) divides up the conditionals. A colon character ( : ) separates each conditional check with the conditional result. A question mark character ( ? ) tells ExpenseConnect to treat the text as a conditional expression.

PayeePaymentTypeName?Employee:ExpenseTypeName | : 'Other'

It is also possible to nest conditions by using parenthesis such as this:

PayeePaymentTypeCode?CBCP: '1517' | : (OrgUnit1?US~UK: '1010' | : '2010')

It is also possible to concatenate conditional results by using parenthesis such as this:

PayeePaymentTypeCode?1000: 'American Express' | : (PayeePaymentTypeCode, 'Unknown'), 'Card'

The above conditional results in one of the following lines:

American Express Card  
1001 Unknown Card

The tilde character ( ~ ) delimits multiple conditional checks. In the above case, '1010' is the return if OrgUnit1 is either "US" or "UK". Otherwise, '2010' is the return.

As a conditional check, use the underscore character for not found values:

Custom1?\_:'00'|:Custom1

In the above case, if Custom1 is blank or not found in the Concur data, '00' is the return.

Otherwise, the value from Custom1 is the return.

It is also possible to do simple math operations if both sides resolve to a number:

TransactionAmount\*'1.05'

The TransactionAmount multiplies by 1.05.

Find the possible fields to map from Concur under the "Response" header at the following link:

<https://developer.concur.com/api-reference-deprecated/version-two/expense-reports/expense-report-get.html>

Review the exact Concur API response by opening up the Report Details.xml text file on the Batch Reports line.

## Value Transformations

EXPENSECONNECT VALUE TRANSFORMATIONS					
Filter		Switch destination: Ledger Journal Transaction			
✓	Group id ↓	Name	Op	Source value	Transform value
	0	Expense Dimension 1	Equals	6035	Expense Dimension 1 600350

Value Transformations work with Field Mappings to transform FO values into other values. Value Transformations (VTs), unlike Field Mappings, act on already mapped values and not directly on fields from Concur data. Here are several cases for using VTs:

- To correct mistakes in Concur that are not easily fixed (e.g. incorrect natural account)
- To work with a single Concur configuration value that is used in several places. For example, if a customer has an account number string where the first financial dimension segment denotes the company, that segment value may need to direct that report line to the appropriate company value. If the segment value is "100" and the company name is "AAA", a VT can transform the company to be AAA whenever 100 is mapped to the Employee Dimension 2 value.
- VTs can group together using the Group value to create transformations from multiple criteria (e.g. a transformation on an entire account string instead of just a single segment).

Whenever possible, fix the data in Concur rather than using a Value Transformation.

## Concur Extract

The Concur Extract setup form is only necessary if using the Extract API source.

The screenshot shows the 'CONCUR EXTRACTS' setup form. On the left, a sidebar contains a 'Filter' search bar and a list of extract names, with 'AP/GL Extract V.2.4' selected. The main form area contains the following fields:

- Extract name:** A text box containing 'AP/GL Extract V.2.4'.
- Additional name:** An empty text box.
- Concur version:** Two radio buttons: 'Standard' (unselected) and 'Professional' (selected).
- Delimiter:** A text box containing a vertical bar character '|'.
- Field locations in extract file:** A section with two columns of input fields for mapping field names to column indexes (1-based).
 

Field Name	Index	Field Name	Index
Batch number:	2	Is personal:	0
Batch date:	3	Payer type name:	163
Request number:	19	Payee type name:	165
Request name:	27	Payment type code:	126
Debit or Credit:	168		

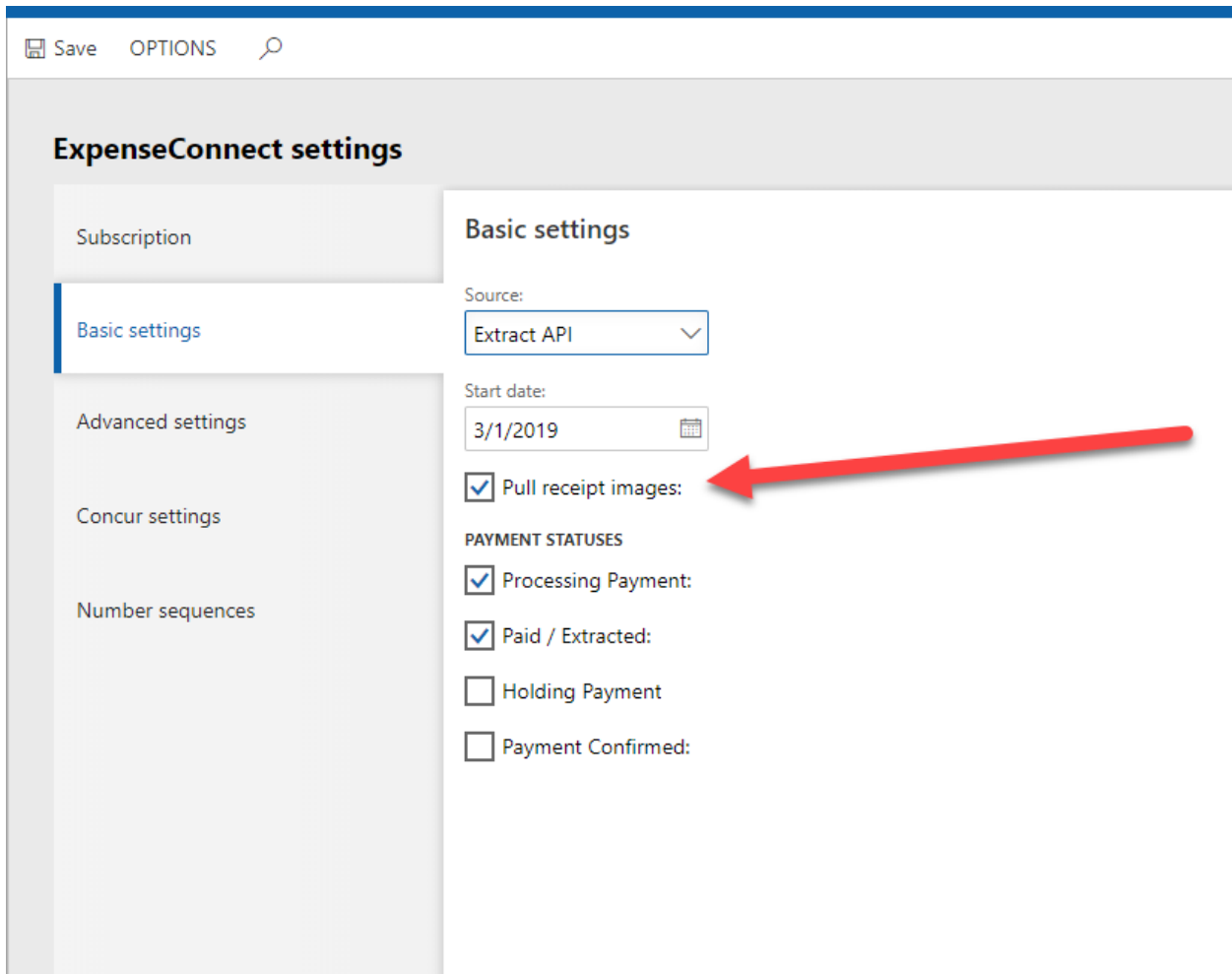
- **Extract Name:** A Concur system can have multiple extracts setup. The Extract Name is the name of the expense extract that ExpenseConnect uses. Use the Additional name field to configure multiple names for the same extract format. Generally, the additional name is only needed if you have an "Emergency Run" extract in Concur.
- **Concur Version:** The extracts look and work differently between Concur versions. Set the radiobutton to the correct Concur version.
- **Delimiter:** The different Concur versions use a different delimiter character to delimit the fields of data.
- **Field Locations in Extract File:** ExpenseConnect uses certain fields to drive behavior, so identify these fields before configuring the field mappings. Define the field locations and their 1-based column indexes in the Field Locations in extract file section. A field with a negative number or zero means it is not in the extract detail and it should be blank or default to the value from the extract header.

## Receipt Images

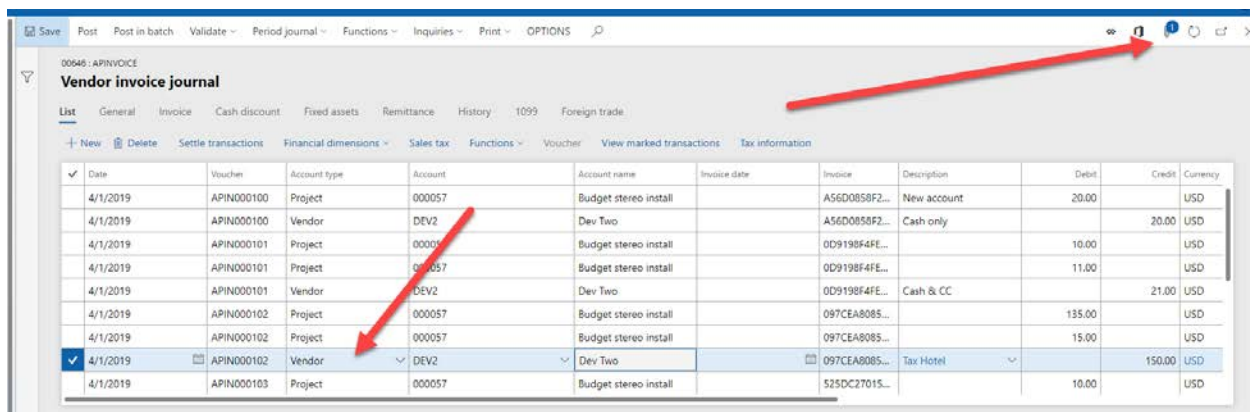
Select the Pull receipt images checkbox in the Settings form and the receipt image will import as an FO Attachment on the Ledger Journal Transaction credit line.

This requires that document attachments have first been setup and configured in FO for the table LedgerJournalTrans. Here is a link explaining how to setup document management in FO.

<https://technet.microsoft.com/en-us/library/dn636897.aspx?f=255&MSPPErrors=-2147217396>



For all vouchers that have receipt images, they will be accessible on the credit line of the voucher by clicking on the document attachment button from the status bar. If you are using the "offset style" mappings, this file will be accessible on the first line of each voucher.



00648: APINVOICE

**Vendor invoice journal**

List General Invoice Cash discount Fixed assets Remittance History 1099 Foreign trade

+ New Delete Settle transactions Financial dimensions Sales tax Functions Voucher View marked transactions Tax information

✓	Date	Voucher	Account type	Account	Account name	Invoice date	Invoice	Description	Debit	Credit	Currency
	4/1/2019	APIN000100	Project	000057	Budget stereo install		A56D0858F2...	New account	20.00		USD
	4/1/2019	APIN000100	Vendor	DEV2	Dev Two		A56D0858F2...	Cash only		20.00	USD
	4/1/2019	APIN000101	Project	000057	Budget stereo install		0D9198F4FE...		10.00		USD
	4/1/2019	APIN000101	Project	000057	Budget stereo install		0D9198F4FE...		11.00		USD
	4/1/2019	APIN000101	Vendor	DEV2	Dev Two		0D9198F4FE...	Cash & CC		21.00	USD
	4/1/2019	APIN000102	Project	000057	Budget stereo install		097CEA8085...		135.00		USD
	4/1/2019	APIN000102	Project	000057	Budget stereo install		097CEA8085...		15.00		USD
✓	4/1/2019	APIN000102	Vendor	DEV2	Dev Two		097CEA8085...	Tax Hotel		150.00	USD
	4/1/2019	APIN000103	Project	000057	Budget stereo install		525DC27015...		10.00		USD

## Current Limitations

The sections below explain the current limitations of ExpenseConnect.

### Marking integrated reports as “Paid” back into Concur

The current functionality of ExpenseConnect cannot synchronize reports paid in FO as “Paid” back into Concur.

### Cash Advances

The Concur API does not give enough information to parse out properly the amount owed to individuals with the use of Cash Advances. The workaround is to use the Extract API if you using Concur Cash Advances.

## Wipfli Support

For Wipfli support with ExpenseConnect, please create a support ticket by emailing [productsupport@wipfli.com](mailto:productsupport@wipfli.com). A Wipfli support engineer will be in contact shortly after to resolve any issues.