



PivotEQ | Frequently Asked Questions

Our goal is to help when you want it – and stay out of the way when you don't!

This datasheet provides a reference list of frequently asked questions and their replies.

Reach us any time at [Concur Sales @ Pivot](#). Search for "PivotEQ" to find all our resources in your Highspot repository.

About PivotEQ

The SAP Concur Intelligence Reporting and Consultative Intelligence also provide a credit card reconciliation report – how is this different from PivotEQ?

The report produced by SAP Concur Intelligence Reporting and Consultative Intelligence provides a point-in-time list of unsubmitted transactions. Customers use this report to manually compare it to their Credit Card Statement to determine which cardholders they need to contact to ask them to submit the expenses. Typically, they rerun this report at least weekly and manually compare the list again.

In contrast, PivotEQ eliminates all the manual comparison work – and more. PivotEQ automates the entire credit card reconciliation process:

- Compares purchases on the credit card statement to expense reports. *Automatically.*
- Notifies employees with outstanding card purchases. *Automatically.*
- Continues comparison of purchases as expense reports arrive. *Automatically.*
- Creates accounting entries based on the customer's accounting method preferences. *Click a button.*

How does pricing work for PivotEQ?

PivotEQ pricing has two components, a one-time setup fee and an ongoing subscription fee. The subscription fee is tiered in alignment with the number of Concur Expense reports that are processed each month. To determine pricing for a specific customer, complete the quote section of the [PivotEQ Quote/Order Form](#).

Card Programs

Which card issuers does PivotEQ support?

PivotEQ can support any card issuer if the customer can access the card statement transactions.

Does PivotEQ support multiple card programs?

Yes, PivotEQ can support an unlimited number of card programs.

Can PivotEQ support multiple card programs from different card issuers?

Yes, one PivotEQ instance can support multiple card programs. For example, a customer may have both MasterCard and American Express cards.



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Email Reminders

Can I customize the email reminders?

Absolutely! The email reminder templates are preconfigured and can be used out of the box, however they are fully customizable. You can determine timelines (send based on Statement End Date or Accounting Deadline), add your company brand, label specific calls to action, and of course, edit the messages.

I'm using the SAP Concur email reminders for unsubmitted transactions. Can I turn them off?

Yes, email reminders from SAP Concur can be turned off in both Standard/Universal and Professional/Enhanced modules, and of course, that's the best practice to avoid confusion. The options vary depending on the SAP Concur module and the type of card program. Discuss this with your Pivot Project Manager and they can provide you with some direction for requesting SAP Concur's assistance as needed.

Can I exclude a cardholder from receiving automatic emails, even if they have outstanding transactions on the statement?

Yes. This may be needed where certain cardholders do not submit Concur Expense reports. There would be no reason to send that cardholder a reminder to complete their expense report.

Activation

How do I get started?

You'll be assigned a Pivot Project Manager to guide you through the activation project. Usually, a couple of customer meetings will be just right to get PivotEQ into production.

What are the steps to activate PivotEQ?

Your Pivot Project Manager will meet with you to determine your specific requirements. Generally, there are three key elements to address: a) credit card transaction data, b) email reminders, and c) the accounting settings.

Is there PivotEQ training?

At the point PivotEQ is in production, your Activation is complete, and your Pivot Project Manager will transition you to our Support Team for ongoing care. As a key part of that transition, a Support Team member will contact you to schedule a training session, along with 'how-to guides' for future reference.

What is the learning curve for PivotEQ?

Once in production, PivotEQ runs automatically in the background with very little time needed to learn the application.

Support

What if I need help in the future?

Simply send an email to the [Pivot Support Team](#) and someone will reach out to you right away!