Concur Import/ Merge

Profile creation/ Import

When implementing Concur there are several options to go about it depending on if the clients were already in Amadeus and (or) in Concur.

1. If the profiles were already in **only** Amadeus then you can:

- Import the profiles via Read from CSX
- Activate Concur and add the refresh token as well as the travel config id on the company profile and then mass-publish all profiles to Concur. This will cause new profiles to be generated in Concur. Faces username will be set as the Concur username so perhaps you can amend this via CSV to be the same as the travellers' before carrying out the previous step.

2. If the profiles are in **both** in Concur and Amadeus then you can try to **merge** the profiles by:

- Importing from CSX into Faces via Read from Profile
- Pulling the traveller CSV of the particular company
- Adding an additional column with the header "sortedPublishStates1.recordlocator" to the CSV
- Entering the correct Concur usernames in the CSV under the newly created column and saving the file
- Activating Concur on the company profile and inserting the refresh token and the travel config ID then saving
- Uploading the updated CSV File into Faces to create a merge.

Please note that the Concur Profile data will then be the same as that in Faces **(Faces overwrites Concur).** This second method should therefore be used only if:

- The data is Amadeus is more up to date than that in Concur
- The data in Amadeus and Concur are the same
- The credentials in Concur have been sent and you do not wish to create new profiles/ resend credentials

3. If the profiles are in both systems **yet Concur is more up to date** than Amadeus then it is best to

- Create a new company profile in Faces
- Activate Amadeus and Concur then add the refresh token as well as the travel config id on the company profile
- Synchronize profiles from Concur to Faces. This will cause new profiles to be created in Amadeus
- Go into Amadeus and delete (deactivate) the old company profile as well as its travellers.

The usual tip, extract the traveller CSV again and verify the completness and correctness of data. In case of any discrepancies, contact Umbrella Support for help asap before making any changes to any profiles.