



# Video Transcript: SAP Concur Connector

[\[Link to video\]](#)

Hi everyone. Today we are going to talk about how to set up the SAP Concur connection. It is going to be one of the new GA connectors as part of other connectors and Data Cloud Setup.

There's a small process that you have to do before actually going to other connectors in Data Cloud Setup, which is to set up the authentication provider and named credential for SAP Concur. I'll try to demonstrate that first.

So we go to the normal Setup and we type Auth and we come to Auth providers here. I've already done the configuring for SAP Concur demo, so I'll just go ahead and explain what you have to put at the moment. So there are certain standard things that you will be asked to provide. Let's say I want to create a new auth provider. I'll explain in that screen better.

So, we select new, and we go on Open ID Connect. Now, the name is any name that you can give. You need to get the consumer key and consumer secret and the auth endpoint URL and token endpoint URL, and you need to unpick this button.

Now where will you find all these details? You go to your SAP Concur instance and you go to administration and authentication admin. You go to Oauth application management, which is the Oauth process that we're doing in Salesforce. I've already created an app here. Basically you have to create an Oauth app which helps establish a connection between Salesforce and your SAP Concur instance.

Once you create this app, you will have to give certain grants and you will have to give certain scopes. I'll stay on the screen for a bit so that you can take a screenshot. We'll also provide this in our help documentation.

Now this is the part which is important for you, which is the redirect URL. We will come back to this. You won't have this when you begin to create this connection, but I'll tell you how to get this. So in the beginning, you just have to give the name, you have to give allowed grants and allowed scopes, and you have to save the app. You will be able to find your client ID and client secret when you create this Oauth app.

Once you find this, you go back to your auth provider and you input your consumer key consumer secret as the client ID and the client secret. Now what has to be put as the authorization endpoint URL and token endpoint URL? I'll just go to my SAP Concur and demonstrate that. This is standard. This is what has to be put in yours as well. Generally it will begin with the US. It's the region where your SAP Concur instance is hosted, but this could be GLZ and any other region where your instance is hosted. The authorization URL will end with authorized. The token endpoint URL will end with token. Again, going back to a new connection, that's the only details that you have to give while setting up.

Once you're able to successfully unpick this and establish and save, you'll see an already made auth provider where what you have to do is you have to copy the callback URL. You have to go back to your concur instance and the Oauth app that you had and edit and add that URL in the redirect URL and then submit it. So if you edit, you paste it here and then you submit it. What this does is essentially tells your concur instance that you're now connected with Salesforce and then eventually Data Cloud.

Once you do that again, come back to your Auth provider and try to hit this URL. Hit as in you copy this and you enter this in your instance and um in your in your, you know, Chrome. And when you click on it because I've already established a connection here, I'll see an XML. If you're doing it for the first time, you'll have to click on an allow button and you will just be able to then see the XML that I'm seeing on my screen here. So this process is done. Let's move on to the next step, which is named credential.

Now named credential is where the 2nd step comes in. So go to external credential, go to new. Select your label name and your authentication provider, which will be Oauth 2.0. Your authentication flow type will be Browser Flow. Your identity provider will be Auth Provider, and you will be able to select the Auth provider that you selected that you created in the previous step before this, which is SAP Concur demo. I already created one, so it's present here.

Now what you have to do after this step is to go and create a principal. Now when you go and create a new principal, you'll have to just give a name to it, and then you'll have to click on named principal and save it. And once the principal gets created on the drop down here where you see this button authenticate, mine is already authenticated, so it's showing as configured. You just have to hit the button authenticate.

Go to named credentials again. Come to this named credential, click on new and now create a link between your external credentials. Now. Give a label, give a name. The URL will be uh the simple URL which is going to be the US2.concursolutions.com. I can demonstrate what the URL is from the already created name credential here. This is US2.concursolutions.com. You'll select the external credential that you created in the step before this, and that's it, while you're good to go. Your auth provider and name credential is set up.

Now, the next step is go to permission sets and create a custom permission set. Uh, go to new, create a normal custom permission set which is called Access to external credential. Uh, and, um, I'll show what ideally you should be able to see. I did one here, access to named credential.

You'll have to come to something called the external credential principal access and add the principal that you created in your external credential. Here and then go to manage assignments and add your user here. So I added the user that is here.

All good to go. We've done 3 things till now. We've created an auto provider, we've created a name credential under which we've created an external credential and a principal, and we have created a principal uh permission set which gives permission for me, my user to access this named credential.

Now let's go to other connectors uh in the Data Cloud Setup. And Go to other connectors, go to. Go to SAP Concur, try to search for it. And this is SAP Concur, go to. This screen, select your connection name and in your named credential you will be able to see the named credential that you just selected. Let me do one on the spot, uh, even though I've already created one. Let's see if this tests well. So connection was established, which means it's working fine. I'll not save this because I've already saved it with the same credentials here. And this is my saved connection.

Now what you have to do is just come to data streams, go to new. In Data Cloud and select SAP Concur. And then select whatever objects you want to input. So it's, it's not as straightforward as the other connectors, but once you understand and get the flow of how to set up the named credential and the oauth provider, this should be good to go. And in the future, what we are doing is to even simplify this further and bring something which is called one click Oauth checkout where you do not have to do these many steps to set up the Oauth. So that will simplify a lot of things in the future, but for now, this is how you set up the SAP Concur connector. Happy connecting.

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