WalkMe Partner Console for SAP Concur

Brief Overview

The Partner Portal for SAP Concur gives the flexibility to manage and share content with multiple accounts, while still allowing each account to create and customize content to meet their individual needs.

There are two complementing aspects to the Partner-Client Model, the Partner Portal and the Partner's Gallery.

Partner Portal

The Partner Portal provides central access to the main configurations needed by Partners. There you are able to:

- Create and manage clients
- Provide a snippet out-of-the-box without additional efforts from clients (via tag manager)
- View an overview of client's usage data

Partner's Gallery

Partner content created in the Editor will be uploaded to the Solutions Gallery and will then be available for download by their clients.

The client will be able to download that content to their Editor account, customize it, and then publish the newly created content that will replace the standard partner content.

When the customer's user will access the Partner app, WalkMe will identify it and dynamically load the correct snippet and its unique WalkMe content.

Please note: Once content is downloaded and moved into an Editor account it will no longer be linked to the original content and any updates will need to be managed individually.
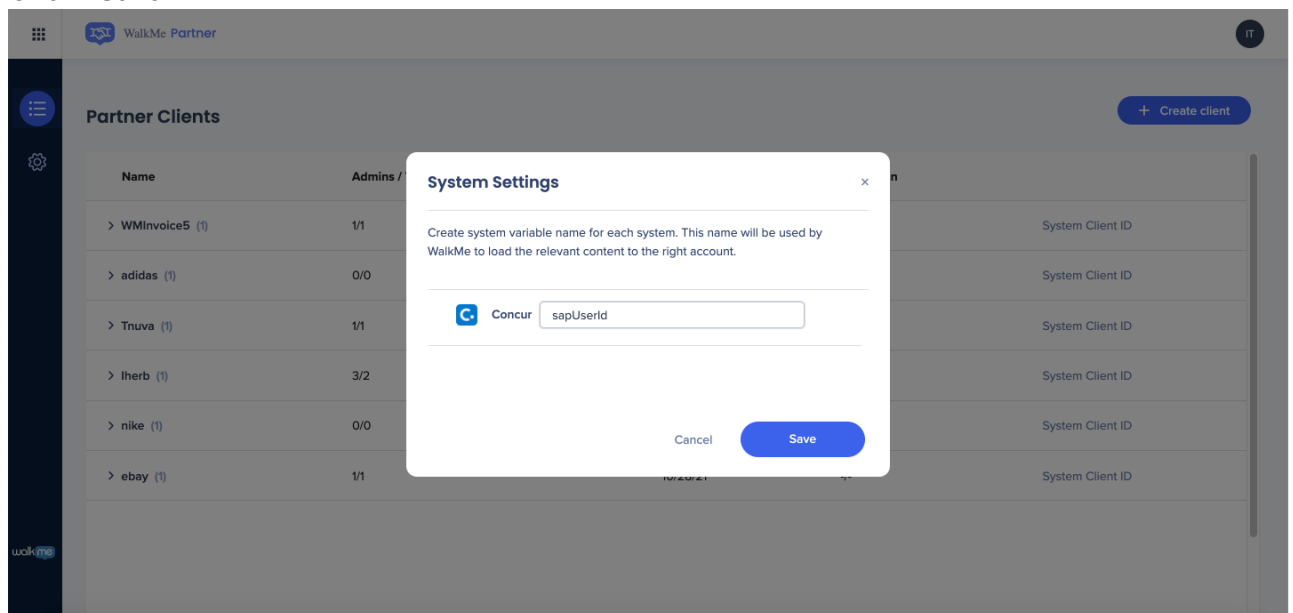
How It Works

General Settings

1. Login to the **Partner Portal** at **partner.walkme.com**
2. Click on the Settings icon from the left menu
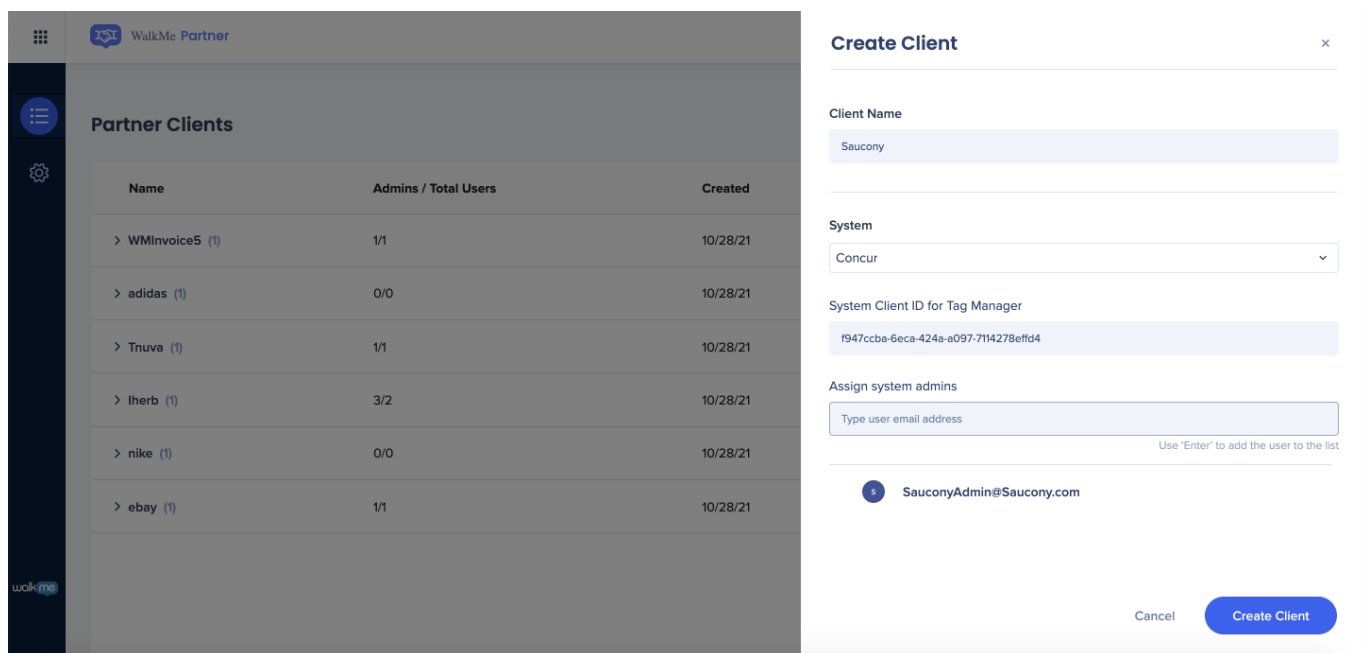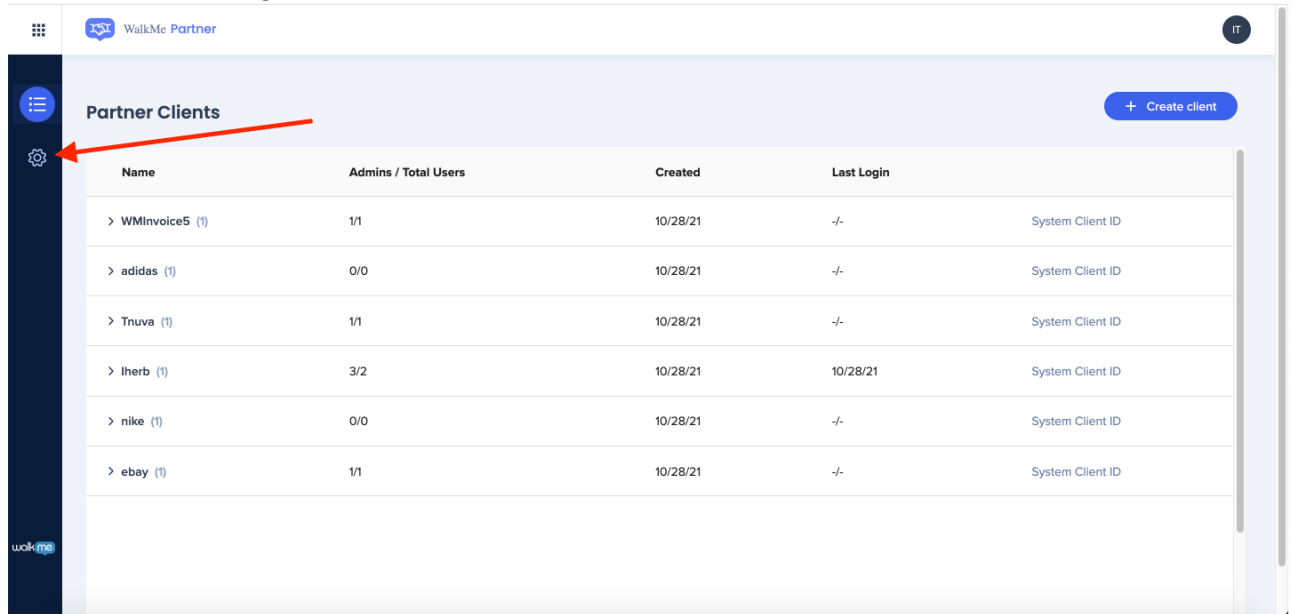

3. Add a system variable name
   - **Example**: sapUserId
4. Click "Save"

Create New Client

1. Click on the "+ Create Client" button
2. Enter client name

          ○ **Example**: Nike
3. Select a system from the dropdown options
          ○ **Note**: Currently only SAP Concur is supported
4. Enter System Client ID for Tag Manager
          ○ **Example**: f947ccba-6eca-424a-a097-7114278effd4
5. Assign System Admins
          ○ **Note**: At least one Admin must be assigned
6. Click on "Create Client"

Activate Client

After creating a new client an activation email will be sent to the admin email address provided.

The client should follow the steps below to activate their WalkMe account.

1. From the activation email, click on the "Activate Account" button
2. Enter first name, last name, and set a password for the account
3. Click "Sign Up"

![walkme logo]

![walkme]

WalkMe - Welcome to WalkMe!

Hi N/A,

Your organization is using WalkMe to manage your web applications. This means you can conveniently access all the applications you normally use, through a single, secure home page.

Your system administrator has created an WalkMe user account for you. **Click the following link to activate your WalkMe account:**

Activate Account

This link expires in 7 days.

Edit Client

1. Click on the client line you would like to edit
2. Click on the "Edit" button
3. Edit the desired fields
4. Click "Save"

Note:

- All fields except "Client Name" can be edited
- There is also an option to remove a client that has not activated their account yet and to resend the activation email