

Auto-Forwarding Cater Nation Receipts to SAP Concur

Email rule / filter setup guide — Outlook and Google Workspace

This guide sets up an automatic rule that forwards Cater Nation catering receipts into your SAP Concur account. Cater Nation sends a receipt once an order is closed for payment, from **info@caternation.com**, with the words “**Concur receipt**” shown in the top-right of the invoice and in the inline email text, plus the receipt as a PDF attachment. The rule keys off those markers.

What this rule does

Comes from	info@caternation.com
Contains the text	"Concur receipt" (in the email body or subject)
Has	an attachment (the PDF receipt)
Then it will	Forward the email to receipts@concur.com

Before you start — verify your email in Concur (required for every method)

SAP Concur only accepts receipts sent **from an email address that is verified on your Concur profile**. In Concur: **Profile > Profile Settings > Email Addresses**, add your address if needed, click **Verify**, and enter the code Concur emails you. When it shows **Verified**, you're ready.

Use “Forward,” never “Redirect”

A **Forward** sends the message from your address, so Concur recognizes you and files the receipt. A **Redirect** keeps Cater Nation's address as the sender, which Concur will reject. Choose **Forward** everywhere below.

Setup A — New Outlook for Windows & Outlook on the web

These share the same Settings screen. Rules here run on Microsoft's servers, so they work 24/7 even when your computer is off — the recommended option for Microsoft users.

- 1 Open Outlook. Click the **Settings** gear (top-right), then **Mail > Rules**.
- 2 Click **+ Add new rule** and give it a name, e.g. **Concur Receipts - Cater Nation**.
- 3 Add condition **From = info@caternation.com**.
- 4 Add condition **Body includes** (or **Subject includes**) = **Concur receipt**.
- 5 Add condition **Has attachment**.
- 6 Add action **Forward to = receipts@concur.com**.

- 7 (Optional) Tick **Stop processing more rules**, then click **Save**.

Setup B — Classic Outlook (installed Windows desktop app)

Heads up: desktop rules only run while Outlook is open

A rule created here runs on your PC, so it only forwards when Classic Outlook is running. If you often close Outlook, use **Setup A** instead.

- 1 Go to **Home > Rules > Manage Rules & Alerts**.
- 2 Click **New Rule > Apply rule on messages I receive > Next**.
- 3 Tick **from people or public group = info@caternation.com**; **with specific words in the body = Concur receipt**; and **which has an attachment**. Click **Next**.
- 4 Tick **forward it to people or public group = receipts@concur.com**. Click **Next**.
- 5 Skip exceptions > **Next**. Name it, tick **Turn on this rule**, click **Finish**.

Setup C — Outlook for Mac

Recent Outlook for Mac stores rules in your mailbox, so they generally keep running on the server even when the app is closed. Keep the conditions to what the Mac rule screen offers so the rule stays server-side.

- 1 From the menu bar: **Outlook > Settings > Rules**, then click **+ Add new Rule** (older builds: **Tools > Rules**).
- 2 Name it **Concur Receipts - Cater Nation**.
- 3 Add condition **From = info@caternation.com**.
- 4 Add condition **Body includes** (or **Subject includes**) = **Concur receipt**. If your build offers it, also add **Has attachment**.
- 5 Under the action, choose **Forward to** (not **Redirect**) = **receipts@concur.com**.
- 6 Click **Save**.

Setup D — Gmail / Google Workspace

Important: a plain Gmail filter cannot auto-forward to Concur

Gmail requires you to **verify** any forwarding address first, and it sends the verification code **to that address**. Because **receipts@concur.com** is an automated inbox nobody can open, the code can never be entered — so Gmail will not let a filter forward there. Use one of the three options below instead.

Option 1 — Google Workspace admin routing rule (best for a company)

- A Workspace admin sets this up once for the whole domain — no per-user verification needed.
- In the **Admin console > Apps > Google Workspace > Gmail > Routing** (or **Content compliance**), add a rule: if a message is **from info@caternation.com** and **contains “Concur receipt”**, add the recipient **receipts@concur.com**.

- Because Concur matches on the verified user, the cleanest setup forwards from the individual user's mailbox; ask your Google admin and Concur admin to confirm the sending address the routing rule uses so it matches each user's verified Concur email.

Option 2 — Google Apps Script (per user, fully automated)

- At **script.google.com**, create a script that searches your mailbox for **from:info@caternation.com "Concur receipt" has:attachment** and forwards each new match to **receipts@concur.com** using **GmailApp**.
- Add a **time-driven trigger** (e.g. every 15 minutes). This forwards from your own Gmail address, satisfying Concur's verified-sender check, and needs no forwarding-address verification.

Option 3 — Label + one-click manual forward (no setup, fallback)

- Create a Gmail filter: **Settings > See all settings > Filters and Blocked Addresses > Create a new filter**. From **info@caternation.com**, has the words **Concur receipt**, has attachment > **Apply the label** "Concur Receipts" (and optionally star it).
- Once a day, open that label and click **Forward** on each to **receipts@concur.com**. Automatic filing, manual send — reliable when admin access or scripting isn't available.

Good to know

- **Matching the PDF specifically:** Rules can require that a message *has an attachment*, but not that it's exactly one PDF. Pairing "has attachment" with the "Concur receipt" text keeps the match tight in practice.
- **Test once:** Have Cater Nation send a sample closed-order receipt, then confirm it lands in Concur under **Available Receipts / Available Expenses** within a few minutes.
- **If nothing arrives:** re-check that the sending address is **Verified** in Concur and that you chose **Forward** (not Redirect).
- **External-forwarding blocks:** Some IT policies block auto-forwarding to outside addresses (this applies to both Microsoft and Google). If a rule saves but nothing forwards, ask your admin to allow forwarding to receipts@concur.com.
- **Concur address:** receipts@concur.com is current as of July 2026; Concur also accepts receipts@expenseit.com. Update the forward-to value if Concur ever notifies you of a new intake address.