# Hamilton College
# Wright Express MasterCard
https://www.wrightexpresscorpcard.com

## Cardholder Instructions

### Internet Access Set Up

1. You will receive two emails, one with your user name and one with your temporary password.
2. Go to the website, https://www.wrightexpresscorpcard.com and select "Log in for the First Time" as you are already registered.
3. Enter user name and password. The organization ID is Hamiltongrp. **(System will indicate your social security number needs to be entered, but it does not)**. You will be taken to a screen that asks you to accept terms. Once you accept, you will be prompted to change your temporary password.

### Monthly Notification

At the end of the month you will receive an email notification that your statement is ready. Attached to the email will be a statement summary (the first page of the statement) and an excel spreadsheet with a detailed list of transactions for the month. Print the statement summary to submit to the Business Office with attached receipts.

### Monthly Reporting

1. By the 15th of each month, cardholders must enter the appropriate 13 digit GL account to be charged for transactions reflected on the statement summary received at the end of the prior month. This is done by logging on to https://www.wrightexpresscorpcard.com. It is recommended that users click the Save button often to avoid being logged out.
2. Next go to the right side of the home page and select "Manage Transactions" under the Quick Links. You may also select "Transaction Maintenance" from the top of the screen and then "Transaction Management".
3. Go to the Billing Cycle drop down selection and select the cycle which matches the statement period. Check the My Cards box and click Search.
4. Enter the 13-digit budget line / general ledger code or select the magnifying glass 🔍 to search all available budget lines. If using the drop down selection, you may enter any part of the budget line or description and click search. Select the appropriate account and it will populate the account field.
5. Transactions can be split by clicking the split transaction icon 🖼. Enter the number of splits and click Continue. Input split values by amount or percent. The total dollar or percent amount of splits must equal 100% of original transaction. Once all split amounts are entered, click Save.
6. Once you have completed the review of transactions, click the box across the top labeled "Rev".

7.  Click on Notes to enter a description for the charge (e.g. airfare to Chicago to attend a conference, admissions event, or donor visit, etc.).
8.  An expense summary should be created and printed by selecting the following options.
    a.  **Report Studio**
    b.  **Standard Reports**
    c.  **Expense Log**
    d.  **Dates (select from drop down menu)**
    e.  **Last Name**
    f.  **First initial**
    g.  **Format PDF**
    h.  **Run**

9.  You will need to notify your supervisor that your statement is ready for review and approval.
10. Forward your printed statement, expense summary and attached original ***original invoices or receipts*** to the Business Office.  Again these are due by the 15th of the month following the statement end date.  Please note that some departments may have earlier internal deadlines and submission requirements unique to their department.

## <u>Supervisor Approval of Transactions</u>
1.  Log on to https://www.wrightexpresscorpcard.com.  It is recommended that users click the <u>Save</u> button often to avoid being logged out.
2.  Go to the right side of the home page and select "Manage Transactions" under the Quick Links.  You may also select "Transaction Maintenance" from the top of the screen and then "Transaction Management".
3.  Go to the Billing Cycle drop down selection and select the cycle which matches the statement period.  Uncheck the My Cards box.
4.  In the Search Criteria box, click the drop down to search by Last Name.  Click Search.
5.  Review the budget lines, notes, splits, and invoices/receipts for all transactions.  Click the "App" box to indicate that you approve all transactions.
6.  Notify the cardholder that you have approved all transactions and the statement is now ready to be sent to the Business Office.  Please note that transactions need to be approved and statements forwarded to the Business Office by the 15th of each month.

**Contact Roxann Jeffers at ext. 4306 for questions or assistance with activating your new card, setting up internet access, and using the on line tools.**

**The phone number associated with all Wright Express cards is 315-859-4376 which is the phone number for Gary Carrock, credit card administrator for Hamilton College.**

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