Wright Express MasterCard

https://www.wrightexpresscorpcard.com
866-558-5982

Cardholder Instructions

To Apply for a Corporate Credit Card

1. Complete Wright Express MasterCard Application form.
2. Have your supervisor sign and approve the application.
3. Return completed form to the Business Office.

Card Activation

1. Call the number on the card to activate. If you are transferred to a customer service representative and they ask for the address and phone number on the card, the address is 198 College Hill Rd. and the phone number is 315-859-4376.
2. Remove sticker and begin card use.

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 enter user name and password. The organization ID is Hamiltongrp. **(It is not necessary to enter your social security number)**.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.
3. You will receive monthly notification by email that your statement is ready. If you need to **edit** or **add** notifications, contact the Business Office ext. 4306.
4. 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.
5. Print the Statement Summary and follow transaction maintenance instructions on page 2.

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.

<u>View and Print Statement</u>

1. Click on the "View Statements" quick link on the right side of the home page or click on Transaction Maint, Statements.
2. Select the Statement Closing Date from the drop down and check the My Cards box. Click Search.
3. Click the disk with the green arrow pointing down to open or save your statement.
4. Print the Statement to attach as a cover page to the transaction listing.

<u>Review and Code Transactions</u>

1. Click on the "Manage Transactions" quick link on the right side of the home page or click on Transaction Maint, Transaction Management.
2. Select the Billing Cycle from the drop down and check the My Cards box. Click Search.
3. Enter the 13-digit budget line / general ledger code or select the magnifying glass to search all available budget lines. Enter any part of the budget line or description and click search. Click on your number and it will populate the general ledger box.
4. 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. Total of splits must equal 100% of original transaction. Click Save.
5. 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.).
6. Click the "Rev" box to indicate that you have reviewed and coded your transactions.
7. **Click the <u>Save</u> button often to avoid being logged out.**
8. Print the Transactions.
9. Notify your supervisor that your statement is ready for review and approval. Supervisors see **Supervisor Approval of Transactions** below. **<u>After your supervisor has approved all transactions, you may need to re-print for any changes.</u>**
10. Submit your statement, transactions, and ***original invoices or receipts*** to the Business Office no later than 15 days after the end of the statement cycle.
<u>**Please adhere to any internal deadlines within your department for review and approval. Athletic cardholders should continue to submit statements and receipts to Kim Hutchins.**</u>

<u>Supervisor Approval of Transactions</u>

1. Click on the "Manage Transactions" quick link on the right side of the home page or click on Transaction Maint, Transaction Management.
2. Select the Billing Cycle from the drop down. <u>Uncheck</u> the My Cards box.
3. In the Search Criteria box click the drop down to search by Last Name. Click Search.
4. Review the budget lines, notes, splits, and invoices/receipts for all transactions. Click the "App" box to indicate that you approve all transactions.
5. **Click the <u>Save</u> button often to avoid being logged out.**
6. Notify the cardholder that you have approved all transactions and the statement is now ready to be sent to the Business Office. Statement packages are due to the Business Office no later than 15 days after the end of the statement cycle.