

SAM Quick Tips for MACs

Corporate Payment Services has not been certified for use with Apple Macintosh computers. The following information is being provided to utilize the functionality of Transaction Review in SAM in a MAC environment. The following information was tested using MAC OS X Version 10.4.7. The browser used was Safari Version 2.0.4 (419.3).

The tips are only guidelines for using the SAM application on a MAC. This documentation does not address all of the issues you may encounter as each browser and MAC OS version have different complexities not addressed in this document.

1. First, be sure you have Adobe Reader installed on your MAC. You can download Adobe Reader for free at: <http://www.adobe.com/products/acrobat/readstep2.html>.
2. If you need a plugin for viewing PDF's, you will need to use the PDF Browser Plugin, which is free for non-commercial use. You can find plugins at <http://plugindoc.mozdev.org/> for your version of MAC OS.
3. Next, you will need to open the Adobe Reader application and navigate to preferences under the file menu option.
4. In the Internet section, click on the box to de-select the check box next to the "Display PDF in browser using: Adobe Reader 7".
5. Transaction Review is viewable on a MAC. You should look closely to identify all of the scroll bars. There may be scroll bars in the "window" and keep in mind the scroll bars in the SAM application. You will probably have to scroll over to the far right to view transactions and their details.
6. Once you have completed any changes or approvals, you will then need to scroll to the left to access the "reports" menu option.
7. Once you have selected the report and finalized your date range, click on the "create report" button.
8. You may receive a dialogue box message with "This operation is not allowed." If you see this, click ok. Then click the "create report" button again. Again, if you receive the message that the operation is not allowed, continue by clicking ok and then select to create the report again. You may need to do this more than three times.
9. Once you receive the message "Report generation appears to be taking its time. You can monitor status of completed reports on the Home page", click on the Home menu option at the top of the SAM application.
10. In the quadrant under the heading "Completed Reports and Queries" you should see the name of the Transaction Review report you generated appear in underlined in blue. Click on the link and the next page may appear blank, however, you can scroll down the page and there will be two options, "Export" and "View full screen".
11. By clicking on the export option, a new "window" will open and you can print and save the report results from there. By clicking on the view full screen option, the report will display in Adobe Reader and you can use the save and print icons on the left-hand side of the menu options across the top.

Please note: Once you have clicked on the link on the home page, the link disappears. You will have to generate the report again from Transaction Review should you fail to save or print your results once you have clicked on the link and opened the report.