

Concur Systemwide Instance

User Guide – Credit Card Service Request

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CREDIT CARD SERVICE REQUEST

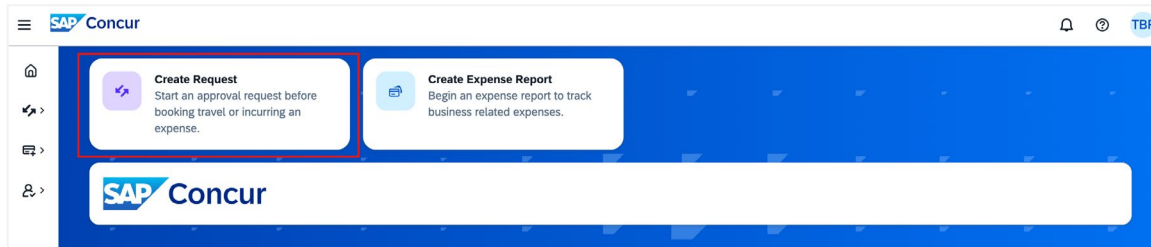
Creating a Credit Card Service Request

Before completing a credit card service request, review and ensure you understand the [CSU Payment Card Policy](#). For questions or additional guidance, reach out to your university Finance or Procurement team.

Note: The screen captures included in this document may look slightly different on-screen due to user interface changes made by Concur.

Request Header

1. From the **Home** page, click **Create Request**.



2. In the **Create New Request** window, the **Request Header** defaults the **Request Type** to Employee Request – Travel. Click the drop-down in the **Request Type** field and select **Credit Card Service Request**.

3. The **Request Header** fields for the Credit Card Service Request display. Complete the Request Header details. All fields identified with an asterisk (*) are required.

- After completing the fields, click **Create Request**.

Note: Some card types are not available for specific universities. User will receive an alert if they select a card type not available for their university.

- To edit the Request Header, select the **Request ID** link or go to **Request Details** → **Edit Request Header**.

Adding Card Service to Request

Although the card service is not an expected expense, there is no ability in Concur to modify the name from “Expected Expenses”. The functionality to add services is similar to other request forms.

- The Expected Expenses screen displays. Click **+Add**. At least one card service must be added to submit the Request.

Demo Card Service for Guide

[Submit Request](#)
[Copy Request](#)
[Delete Request](#)

Not Submitted | Request ID: [KLV7](#) | 02/16/2026

[Request Details](#)
[Attachments](#)

EXPECTED EXPENSES

[Add](#)
[Edit](#)
[Delete](#)
[Allocate](#)

No Expected Expenses

Add expected expenses and/or travel plans to this request to submit for approval.

2. Select the card service category for your request.

Add expected expenses and/or travel plans

[Collapse All Sections](#)

CSU Card Services Request

- 01. New Card
- 02. Credit Limit Change
- 03. Purchase Exception
- 04. Suspend/Reinstate
- 05. Cancel Card
- 06. Name Change
- 07. Replacement/Worn Card (Retain same Card #)

3. The 'expense' form for the selected service displays (e.g., New Card).

Note: The form fields will differ based on the card service selected. **Quick Tips**, provided in blue, display important information related to the details being requested.

New Expense: 01. New Card

[Save](#)
[Cancel](#)

Quick Tips [Show Less](#)

Per CSU Payment Card Policy additional approvals will be required for limits of \$10,000 or more
Declining Balance Cards will be determined based on business justification

[Allocate](#)

Required field *

Requested Date *

Requested Single Transaction Limit *

Requested Monthly Limit *

Employee First Name *

Employee Middle Name/Initial

Employee Last Name *

Campus Phone Number *

☐ Card Training Completed

Mobile Phone Number

Provide Justification for New Card *

0/2000

4. Review and complete all required fields and any optional fields, as desired.

Note: For new card requests, users/applicants will be required to complete card training prior to the new card being issued. Reach out to the Card Administrator for your university for additional details and requirements.

5. Click **Save**. The **Expected Expenses** screen displays.

Note: Alerts may display if information is missing for the expense. See the [Alert Types](#) section below for details.

6. Continue to **+Add** until the Request reflects all card services needed. When all card services have been added, click **Submit Request**.

The screenshot shows the 'Demo Card Service for Guide' interface. At the top, there's a header with 'Not Submitted | Request ID: KLV7 | 02/16/2026'. Below this, there are tabs for 'Request Details' and 'Attachments'. The main section is titled 'EXPECTED EXPENSES' and contains a table with columns: 'Comment', 'Expense type', 'Details', 'Date', 'Amount', and 'Requested'. A row is visible with '01. New Card' and the date '02/16/2026'. To the right of the table, there are buttons for 'Add', 'Edit', 'Delete', and 'Allocate'. At the top right of the interface, there are three buttons: 'Submit Request' (highlighted with a red box), 'Copy Request', and 'Delete Request'.

7. In the Card Services Request User Agreement window, review the details and click **Accept & Continue**.

The screenshot shows the 'Card Services Request User Agreement' window. It contains a text area with the following content: 'By clicking 'Accept & Continue', I certify that: - I have reviewed and understand the CSU Payment Card Policy. - I further understand and acknowledge that inappropriate usage of a University Card or violation of any applicable CSU policy or procedure may result in the revocation or suspension of the University Card. - I acknowledge that I will review all card charges submitted in expense reports to determine that they are reasonable, appropriate and consistent with applicable policies and procedures.' Below this, there is a link to the 'CSU Payment Card Policy: https://calstate.policystat.com/policy/19766773/latest/'. At the bottom right, there are two buttons: 'Cancel' and 'Accept & Continue' (highlighted with a red box).

8. The Request is displayed in the Request library.

The screenshot shows the 'Demo Card Service for Guide' interface. It displays the date '02/16/2026 | KLV7'. Below this, there is a green button labeled 'Submitted'. At the bottom, there is a text area that says 'Pending Direct Supervisor Approval Scott Pak'.

9. The approval workflow routing of a credit card service request is dependent on the service requested.
 - a. New Cards – requires direct supervisor approval
 - b. Monthly Limits above the CSU Payment Card Policy threshold – requires DOA/budget owner approval
 - c. All other services route directly to the Card Administrator
10. To review the approval flow, see the [Request Timeline](#) section below for instructions.

Edit Request Header

1. Select **Request Details** → **Edit Request Header** or select the Request ID.

Demo Card Service for Guide

Not Submitted | Request ID: **KLV7** | 02/16/2026

Request Details ▾

Attachments ▾

Request

Edit Request Header

Request Timeline

Audit Trail

EXPENSES

View Request Timeline

The timeline displays the approval workflow and identifies the steps which have been completed or are outstanding.

1. Select **Request Details** → **Request Timeline**.

Demo Card Service for Guide

Not Submitted | Request ID: **KLV7** | 02/16/2026

Request Details ▾

Attachments ▾

Request

Edit Request Header

Request Timeline

Audit Trail

EXPENSES

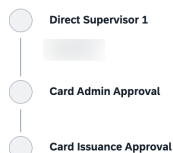
- a. The example below is for new card that is within the monthly limit per CSU Payment Card policy.

Request Timeline

New Card | \$0.00

Approval Flow

Edit



Request Summary

Sort ▾ Filter ▾

Request Comment

0/500

Wednesday, March 4, 2026

Expense Comment - 01. New Card - Mar 15, 2026 - \$0.00

Test Beth Mar 4, 2026 3:16 PM
Will be traveling more this year for the ABC project so need a travel card

Audit Trail

The audit trail will display the timestamp of certain actions taken on the request.

1. Select **Request Details** → **Audit Trail**.
2. The date/time of the action and the description will display.

Audit Trail

Demo Card Service for Guide | \$0.00

Request Level			
Date/Time↓↑	Updated By↓↑	Action↓↑	Description↓↑
03/04/2026 12:53 PM	Test Beth	Approval Status Change	Status changed from Submitted to Pending Direct Supervisor Approval Comment: Step Name:
03/04/2026 12:53 PM	Test Beth	Approval Status Change	Status changed from Not Submitted to Submitted Comment: Step Name: Request Submitted
03/04/2026 12:53 PM	Test Beth	Confirmation Agreement Acceptance	*NEW CSU-Card Services Request User Agreement

Expected Expense Level



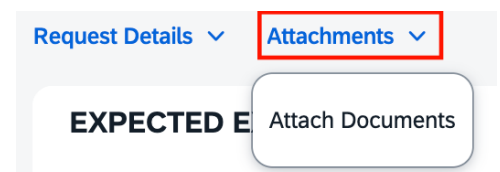
No Data.
There is no data to display.

Close

Attachments

The **Attachments** → **Attach Documents** menu option launches the **Document Upload and Attach** window to browse then **Upload and Attach** files that support the request

1. Valid file types are specified in the window and are pdfs or image files (.png, .jpg or .jpeg, .tif, etc). There is a 5MB limit per file.



Document Upload and Attach



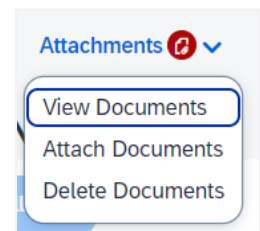
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.

Upload and Attach

Close

- Click **Close** once files have been uploaded.
- Once documents have been uploaded, the Attachments menu displays a small red image to identify that the Request has document attachments. The menu changes to have three options – View Documents, Attach Documents and Delete Documents which can be used to update or remove previously uploaded attachments.

Note: Documents cannot be removed once the Request is submitted or Approved; however, documents can be added at any time.



Alert Types

Alerts are messages triggered by certain criteria in your Request. There are different types of alerts.

Alerts: 1

EXPENSE | 01. New Card | 02/16/2026

 **Warning:** Monthly limits over \$10,000 require additional approval. [View](#)

- ERROR:** If an alert displays in **red**, it is displaying an error. This means an action must be taken before the Request can be submitted.
- WARNING:** An orange alert displays communication related to your Request components advising you to read and take action.

Note: Most orange warnings will not clear; however, they will not prevent the user from submitting the Request.