Concur Systemwide Instance
User Guide – Credit Card Service Request

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CREDIT CARD SERVICE REQUEST

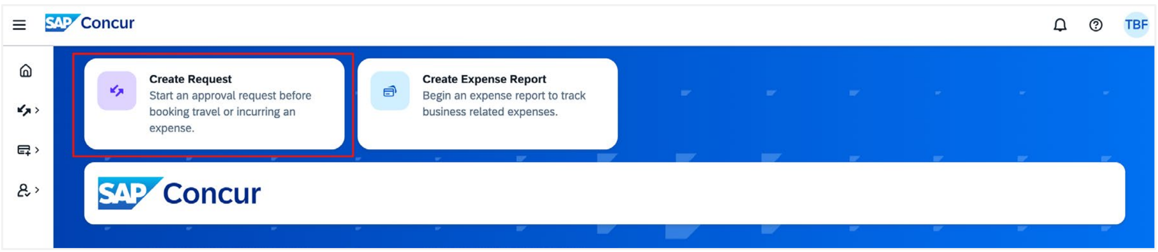
Creating a Credit Card Service Request

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.

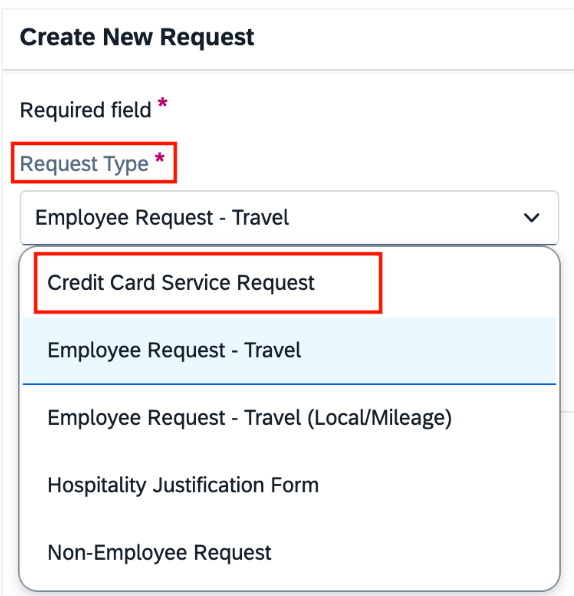
Note: The screen captures included in this document may look slightly different on-screen due to user interface changes made by Concur.

Request Header

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



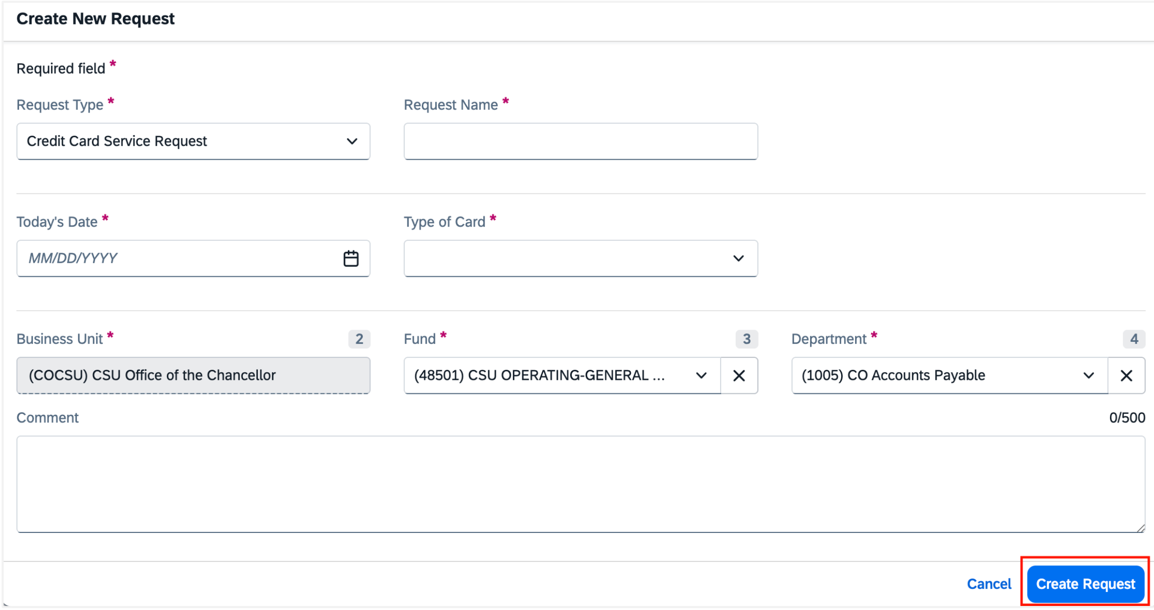
2. In the **Create New Request** window, the **Request Header** defaults the **Request Type** to Employee Request – Travel. Click the drop-down in the **Request Type** field and select **Credit Card Service Request**.



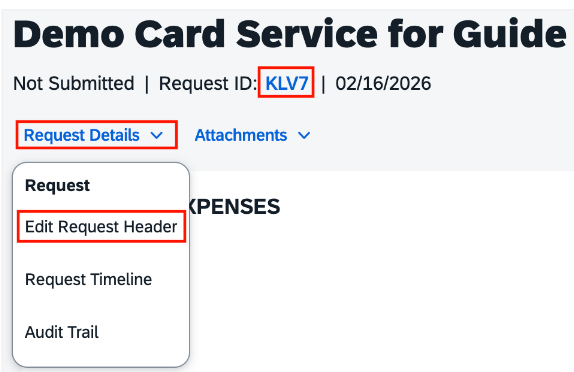
3. The **Request Header** fields for the Credit Card Service Request display. Complete the Request Header details. All fields identified with an asterisk (*) are required.

4. 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.



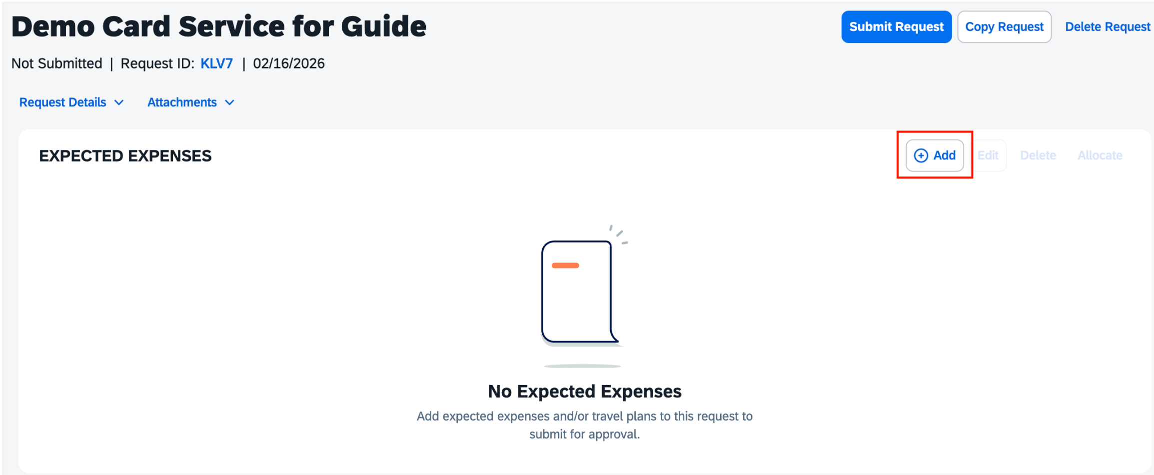
5. To edit the Request Header, select the **Request ID** link or go to **Request Details → Edit Request Header**.



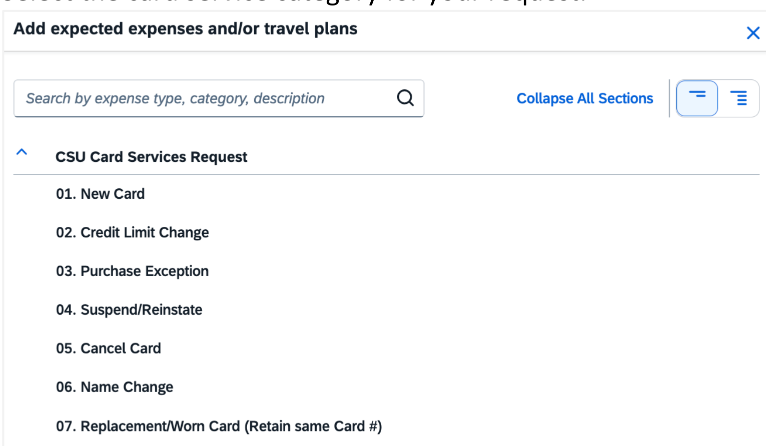
Adding Card Service to Request

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.

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

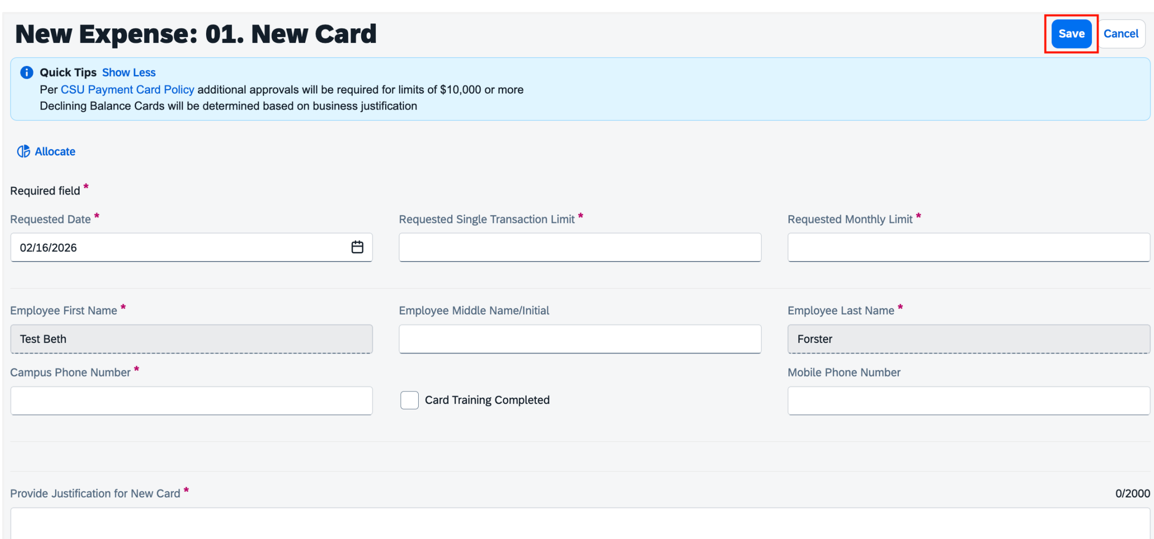


2. Select the card service category for your request.



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.



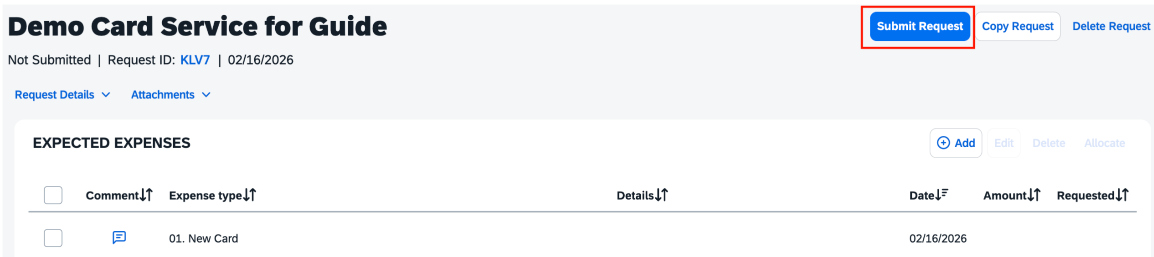
4. Review and complete all required fields and any optional fields, as desired.

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.

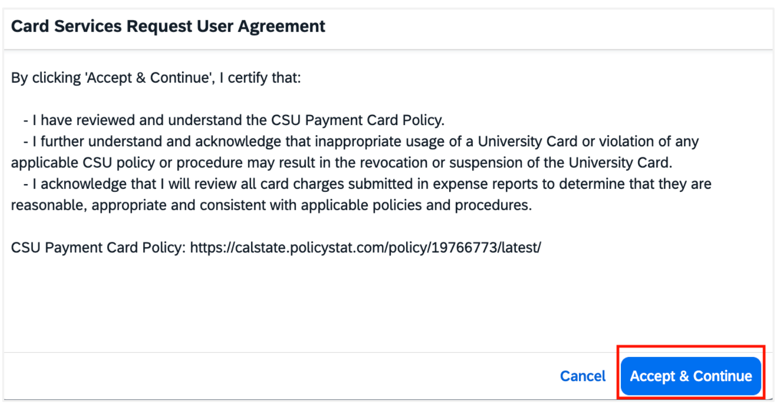
5. Click **Save**. The **Expected Expenses** screen displays.

   Note: Alerts may display if information is missing for the expense. See the **Alert Types** section below for details.

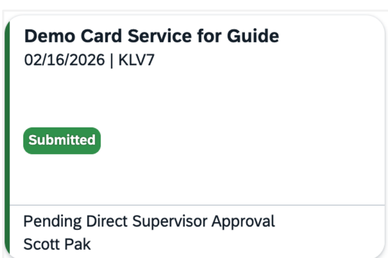
6. Continue to **+Add** until the Request reflects all card services needed. When all card services have been added, click **Submit Request**.



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



8. The Request is displayed in the Request library.



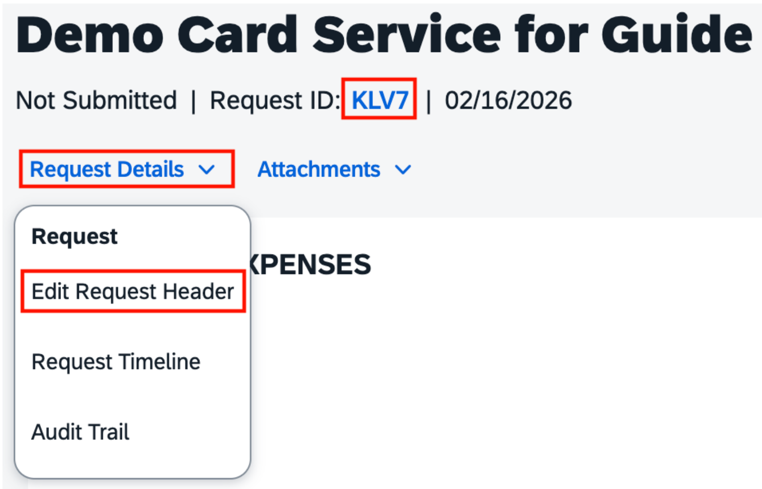
9. The approval workflow routing of a credit card service request is dependent on the service requested.
   a. New Cards – requires direct supervisor approval
   b. Monthly Limits above the CSU Payment Card Policy threshold – requires DOA/budget owner approval
   c. All other services route directly to the Card Administrator

10. To review the approval flow, see the **Request Timeline** section below for instructions.

Request Details

Edit Request Header

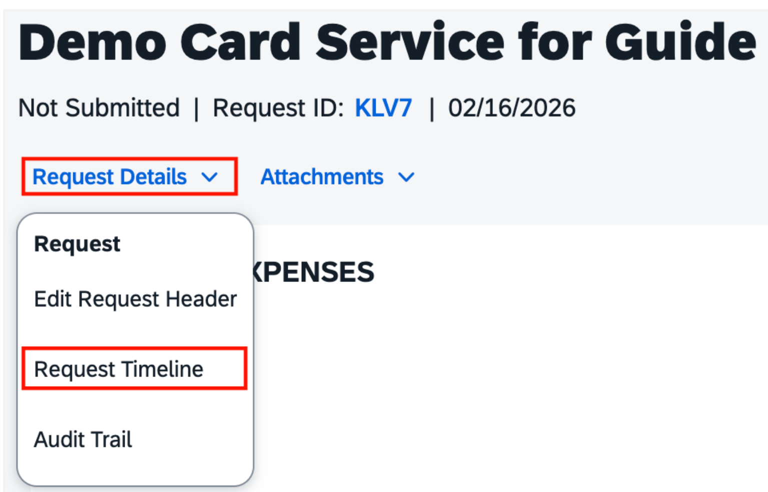
1. Select **Request Details → Edit Request Header** or select the Request ID.



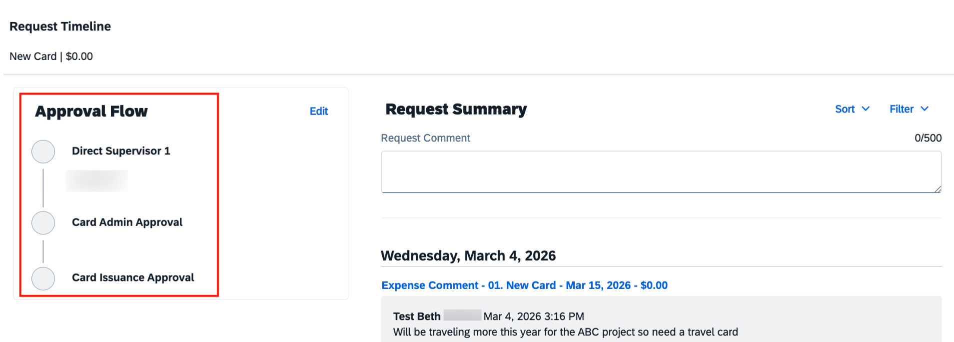
View Request Timeline

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

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



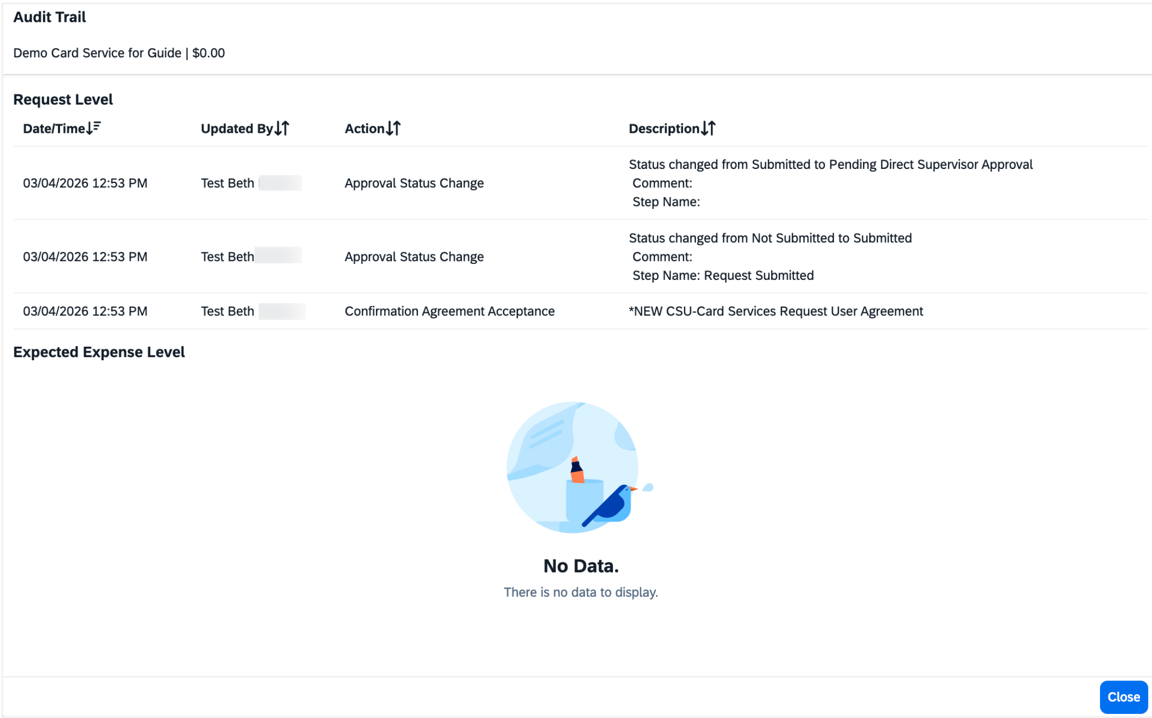
   a. The example below is for new card that is within the monthly limit per CSU Payment Card policy.



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

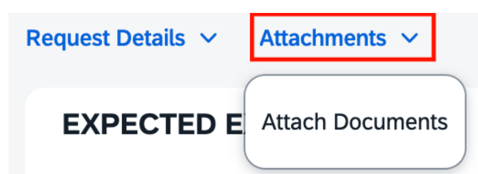
Expected Expense Level

No Data.

There is no data to display.

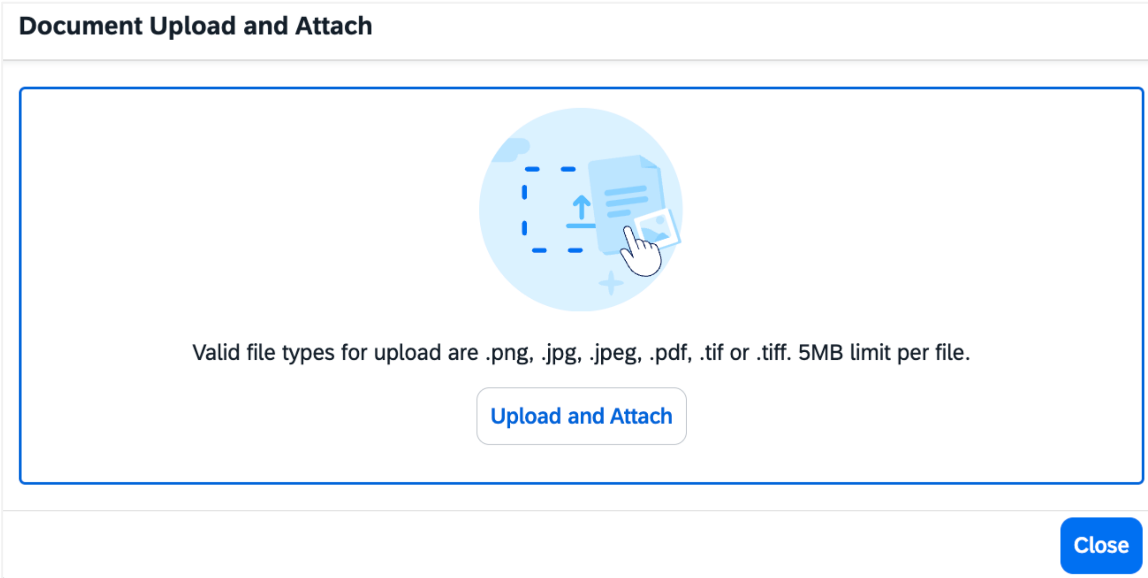
Close

Attachments

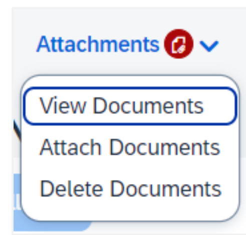


The **Attachments → Attach Documents** menu option launches the **Document Upload and Attach** window to browse then **Upload and Attach** files that support the request

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.



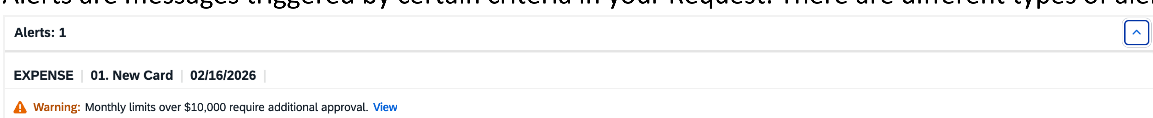
2. Click **Close** once files have been uploaded.
3. Once documents have been uploaded, the Attachments menu displays a small red image to identify that the Request has document attachments. The menu changes to have three options – View Documents, Attach Documents and Delete Documents which can be used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

   Note: Documents cannot be removed once the Request is submitted or Appoved; 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.



1. ERROR: If an alert displays in red, it is an displaying an error. This means an action must be taken before the Request can be submitted.
2. 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.