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** who should receive this notification:
   - go to Transaction Maintenance in the upper right corner of the home page
   - click on Statement
   - click the SEARCH button on the left side of the screen
   - click on the envelope icon "email list" on the left side of the row with your name and enter your email address.
   - If you are a supervisor, you can click on the envelope icon "email list", for each one of your employees and add your email address to their card account. You and the cardholder will receive the same email.
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 Erika Mumford at x 4376 for questions or assistance with activating your new card, setting up internet access, and using the on line tools.

Transaction Maintenance

1. Click on the "Manage Transactions" quick link on the right side of the home page or click on Transaction Maintenance---Transaction Management.
2. **Select date range**. You can select by period (enter today, last 7 days, last 30 days, etc.) or by custom date. (enter the date range). The default will be your current statement period.
3. Click Search. Supervisors will have access to their transactions and the transactions of each of their employees. You can search by last name to view only one set of transactions. Select "Last Name" in the search criteria box and click the search button.
4. For each transaction, assign the correct general ledger code. For example: if you purchased office supplies for the Business Office, the general ledger code (budget line) would be 10-6-203001-4101.
    - Click on the magnifying glass to search all available general ledger numbers.
    - A box will pop up. Begin entering the general ledger number in the code box, click "Search" and the numbers in that range will appear.
    - Click on your number and it will populate the general ledger box.
5. Transactions can be split by clicking on the split transaction icon. Click on the split button, 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 the add button for each split.
6. Under notes, enter a description for the charge. For instance, if your charge was airfare to Chicago to attend a conference or an admissions event, or to visit a donor, you could explain this here.
7. Click the "rev" box. This means that you have reviewed and coded your transactions.
8. Click save. Click the save button often to avoid being logged out.
9. Your supervisor will receive the same email notification at the end of the month that your statement is ready. Your supervisor can review your transactions and confirm that you have entered all required information. By checking the "app" box, he/she confirms that the transactions have been approved.
10. ***After you have reviewed and your supervisor has approved the transactions, print this transaction page and submit with your cover sheet and original receipts*****. (see item 11**). To print, click on drop down arrow next to the print icon at the top of the right side of the page. Click on print preview to view and size the page if necessary. Click on print.
11. Within 30 days after the monthly cycle has closed, submit a copy of your statement along with **original receipts** to the Business Office. The statement should include the Statement Summary sheet and the **approved** Transaction Management sheet(s) (see item 10 above).