










## STEP ONE:

### Logging In

- 1) Open Internet Explorer.
- 2) Enter the following in your address bar: **www.samaccess.com**
- 3) Enter the following on the Strategic Account Management™ (SAM™) Login Screen:  
**Database**, enter “**csuf**”  
**User ID**, enter last 8 of your card #  
**Password**, enter the default password “tuffy12titan” (all lower case)  
**Note:** For security purposes please change your password upon your initial logon to the SAM™ system.
- 4) Click 
- 5) You will see the welcome screen.


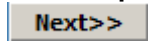
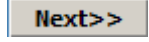

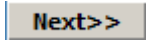
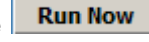

## STEP TWO:

### CARDHOLDERS: Reviewing Transactions

- 1) On the toolbar on top of the Welcome Screen, highlight **Transaction Administration** and then select **Transaction Review**.
- 2) Click on a transaction. Transaction detail will be displayed in the Transaction Detail window.
- 3) Review the account. **If a change is needed**, enter the new account or do a search by selecting the .
- 4) Review the fund. **If a change is needed**, enter the new fund or do a search by selection the .
- 5) Review the dept id. **If a change is needed**, enter the new dept id or do a search by selection the .
- 6) Review the class. **If a change is needed**, enter the new class or do a search by selection the .
- 7) Review the project. **If a change is needed**, enter the new project or do a search by selection the .
- 8) Add any information to the **Remarks** field, if needed.
- 9) Click .
- 10) Enter the **Travel Request Number** assigned to your Travel Authorization for travel related purchases.
- 11) Click the **viewed** box. *(This identifies that you have looked at the transaction).* **This is not a requirement, but is available for your use.**

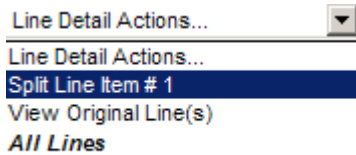
## STEP THREE:

### Printing Expense Log Report and Attaching Receipts to Your Monthly Packet

- 1) Log onto the SAM™ system. **(If not already)**
- 2) On the toolbar on top of the Welcome Screen, highlight **Reports** and then select **Reports Wizard**.
- 3) Click on  box next to **Transaction Review** folder.
- 4) Select **Expense Log** and click on the  button.
- 5) If you have access to more than one cardholder, ensure that the name is highlighted for the cardholder you want and click on the  button. Otherwise skip to step #6.
- 6) Click the  next to **By Billing Cycle** and ensure that the correct billing cycle date is select from the drop down menu.
- 7) Click on the  button.
- 8) Click the  button. (A PDF document will be created and displayed)
- 9) Click , which will print the report
- 10) Navigate to the following website:  
<http://finance.fullerton.edu/Procurement/pcard/web/pcardforms.htm>
- 11) Select the Approval of Procurement Card Transactions form.
- 12) Complete the required fields, print and sign the form.
- 13) Attach all supporting documentation (ex: receipts, D-11 forms) to the Expense Log Report and forward to the Procurement Card Program Office, CP-300, after Approving Official reviews and approves the transactions.

### Splitting Transactions

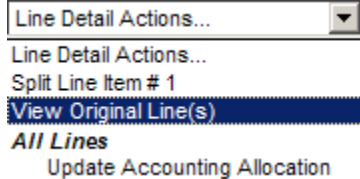
- From the **Transaction** screen, click on the transaction.



- Click **Update Accounting Allocation**
- Select the number of splits from the drop-down box. *The amount will be divided evenly among all rows.*
- You can either keep the even split or enter the amount for each split in either dollar or percent of total.



- When finished, click **Save**.
- To revert to the original, click



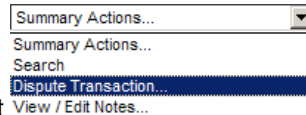
- Then click **Revert to Original**.
- Then click **OK**.

### Procurement Card Program Cardholder Quick Reference Guide

### Disputing Transactions

**Before you dispute a transaction, you must first attempt to resolve the issue directly with the merchant!**

- From the **Transaction** screen, click on the transaction.



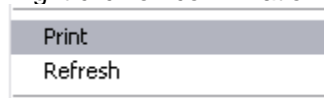
- Select **Dispute Transaction...** from the dropdown menu on top of the transaction summary screen.
- Confirm your **E-mail Address** and **Phone Number**, enter them if empty.
- Choose the **Dispute Reason** from the drop-down box and follow the on-line instructions.
- Enter detailed notes in the comment box.



- Click **Next**.
- Click **Submit**.



- Right click on confirmation screen and select print



- Click **OK**.
- Enter "Disputed" in the **Remarks** box.
- Click **Save**.



### Customer Service

Contact the Procurement Card Program at **pcard@fullerton.edu** for assistance with:

- ▶ Reporting Lost/Stolen Cards
- ▶ Balance Inquiries
- ▶ Dispute Assistance
- ▶ Fraud Inquiries
- ▶ Declined Cards
- ▶ Lost Receipts

### Additional Resources

On-line information is available on the Finance web page at <http://finance.fullerton.edu>.

For information on training class schedules visit the ETD website at <http://etd.fullerton.edu>.

If you have additional questions, please send an email to **pcard@fullerton.edu**.