Quick Reference Guide How to Create a Card Service Request in Concur Concur Travel and Non-Travel



## CREATE A CARD SERVICE REQUEST IN CONCUR

All card requests must be submitted and managed in the Concur Request module. Card Service Request Types include New Card Request, Update Existing Card, Cancel/Close Replace Existing Card, Cash Advance Request.

1. To create a Card Request, click on (+) Create on the Concur home page and select "Start a Request."

5	Concur Home ~	@ CU
	O   Create   ✓   Authorization Requests   0   Image: Available Expenses   20   Image: Expense Reports     Start a Request   Start a Report   Image: Available Expense   20   Image: Available Expense   20 <th>0</th>	0

2. In the Request Type dropdown, select "Card Services Request."

Create New Request								
Request Type *								
Card Services Request								
Card Services Request								
Pre-Trip Request	Request Date *							



3. Header: Enter **Request Name**, **Request Date**, and **Card Service Request Type**.\* Note: The Card Service Request Type you select in the Header must align with the University Card Request you select at step 5. See details below.

Request Type *		
*TEST Card Services Request		
Request Name *	Request Date *	Orard Service Request Type *
TEST	MM/DD/YYYY 💾	Search by Text
		This field is missing required information.
Cost Object *	Cost Object Approver Name * 2	01. New Card Request
(1060260000) Procure to Pay (P2P) X V	~	02. Update Existing Card
Comment	03. Cancel/Close/Replace Existing Card	
		04. Cash Advance Request

\*Card Service Request Types include:

- 01. New Card Request select to apply for a new card if you don't currently have one
- 02. Update Existing Card select to request permanent change limits, temporary change limits, override, name change, campus location update, business unit/department update
- 03. Cancel/Close/Replace Existing Card select to suspend/reinstate, close/cancel, replacement/worn card
- 04. Cash Advance Request
- 4. Select **Create Request**. Then, you will be brought to the Card Request screen to add request details.

Cance	Create Request
l net elde	d in- 03/25/2025 10-01

5. Within Card Request, click +Add and select desired University Card Request from options listed below.

test	
Not Submitted   Request ID: 3DF6	
Request Details 🗸 Print/Share 🗸 Attachments 🗸	
EXPECTED EXPENSES	
Add expected expenses and/or travel plans	×
Search by expense type, category, description Q  University Card Request	Collapse All Sections
01. New University Card Request	
02. Permanent Change Limits	
03. Temporary Change Limits	
04. Override Request	
up, suspend/keinstate 06. Name Changes	
07. Campus Location Address Update	
08. Close/Cancel	
09. Replacement/Worn Card (retain same card #)	
10. Business Unit/Department Update	
11. Cash Advance Request	

## Quick Reference Guide How to Create a Card Service Request in Concur Concur Travel and Non-Travel



- 01. New University Card Request [See How to Request a New Card in Concur]
- 02. Permanent Change Limits
- 03. Temporary Change Limits
- 04. Override Request
- 05. Suspend/Reinstate
- 06. Name Changes
- 07. Campus Location Address Update
- 08. Close/Cancel
- 09. Replacement/Worn Card (retain same card #)
- 10. Business Unit/Department Update
- 11. Cash Advance Request
- 6. Once you've selected the desired University Card Request option, the screen will display the appropriate fields. Complete all required fields and click **Save**. Click **Submit Request** to send your request for approval. Approval workflow remains the same as for Expense Reports (supervisor & cost object approver)

New Expense: 02. Permanent Ch	ange Limits			Save
BU User ID *				* Required field
cu11				
Card Service Request *	Last 4 digits of card number *		Card Purpose/Usage *	
02. Update Existing Card				~
Type of Change	Effective Date *		Single Transaction/Cycle Limit *	
	▶ 05/27/2025	Ë		~
Business Justification/Comment *				0/2000
				h

