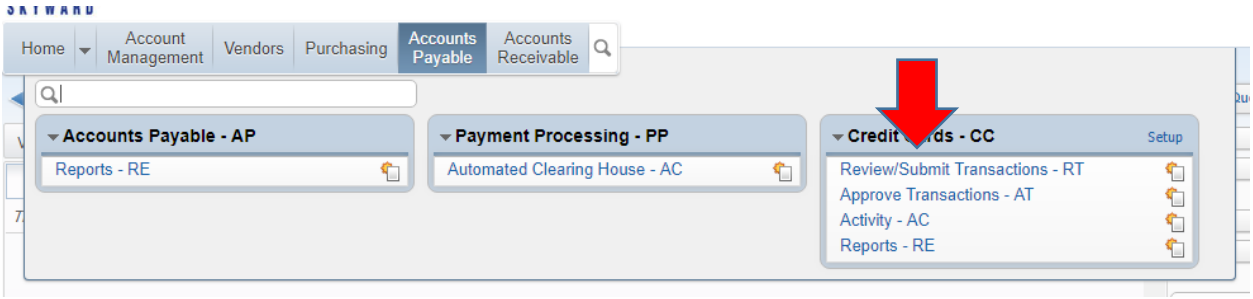
Pcard Purchasing and Approvals Steps

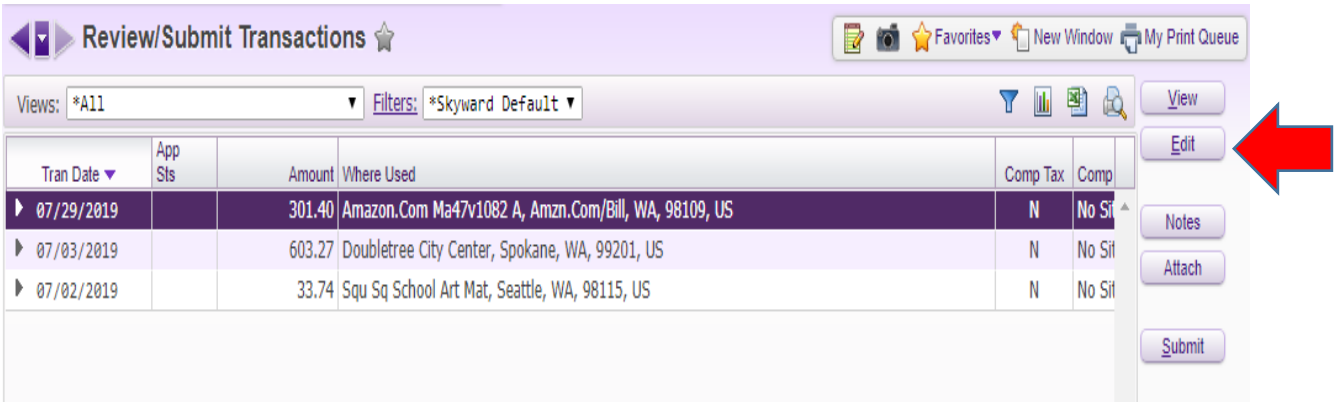
If a department card is being used you will want to make sure you have a Pcard Authorization to Purchase form is completed by the person who is making the purchase. This will need to be signed by the budget administrator BEFORE the purchase is completed and kept on file in the office. Make sure that the account code is properly listed as this is the account that will be used after being imported to Skyward.

Once a week the Business Office will be downloading transactions from BMO and importing them directly into Skyward. When a transaction requires one of your approvals you will receive an email from Skyward asking you to log in and submit the transactions.

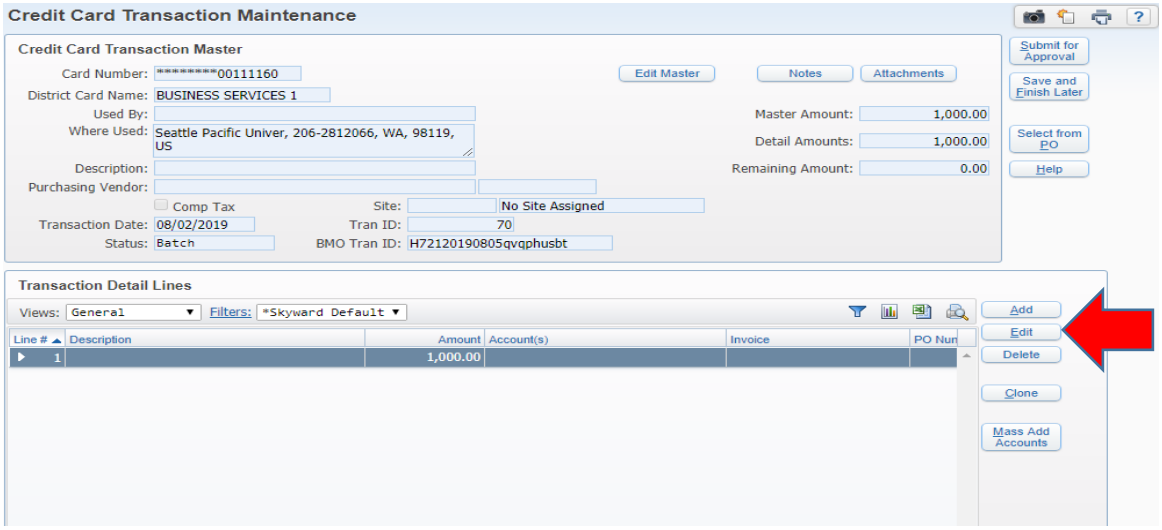
After logging into Skyward the path is FM/AP/CC



Highlight the transaction you want to review.



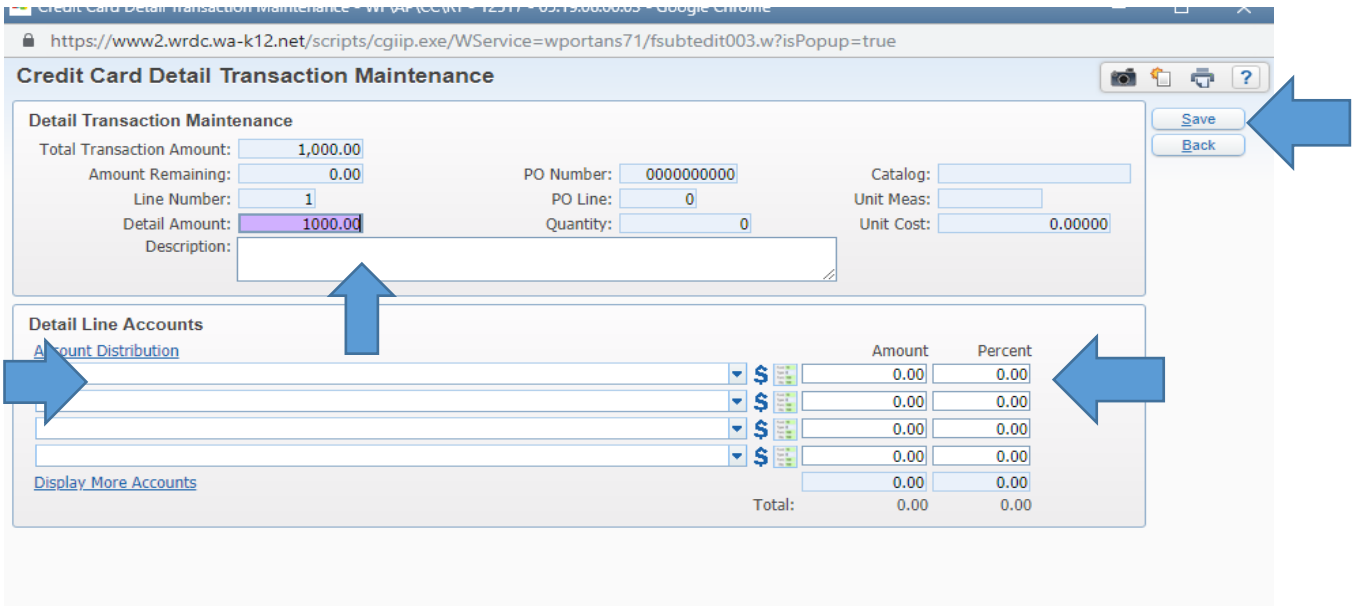
Select edit under Transaction Detail Lines



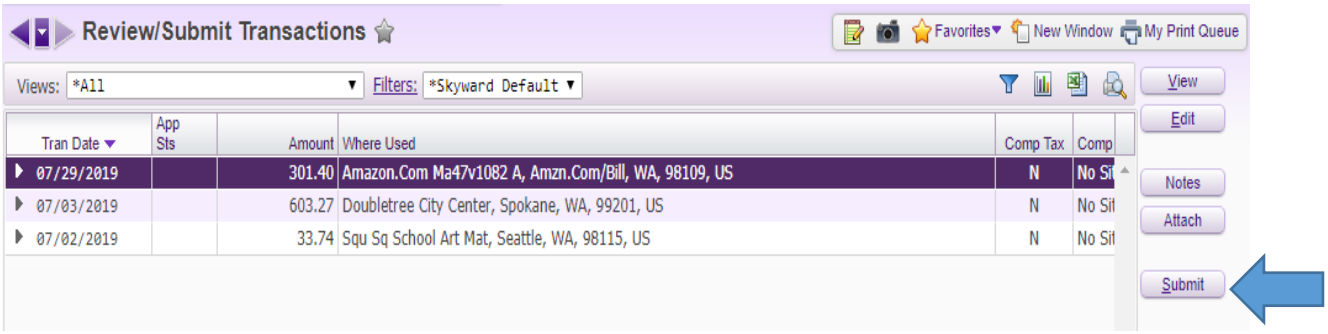
Click on the account description box and add a description of what was purchased. This information should be available on the Pcard Authorization to Purchase form.

Next, fill in the account code, also available on the authorization form. If you want to assign multiple codes to the transaction you will split it out here using the percentage column for distribution.

Finally, save and return back to the main screen.



When you are ready, submit the transaction. The transaction will disappear from your transactions and will be ready to pay by Business Services. Keep all of your receipts and authorization forms in your files at the building.



Various reports can be run using the Report menu on the main Credit Card screen. Here you can create reports that will give you specific information by date. If you need help creating the reports please contact Business Services.