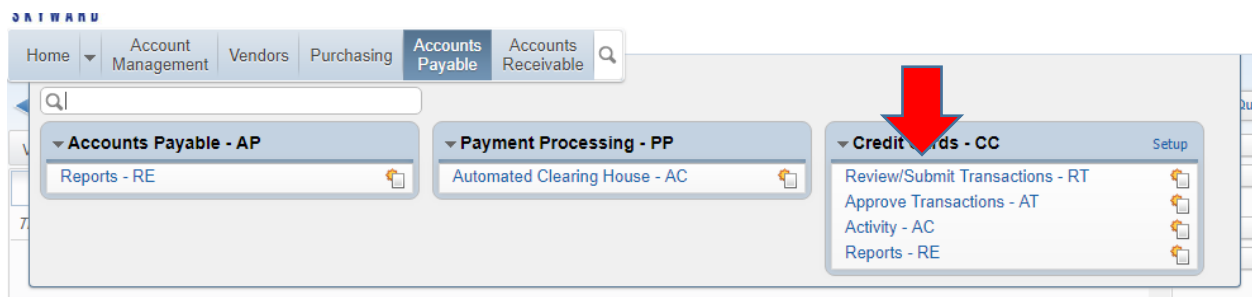


Pcard Purchasing and Approvals Steps

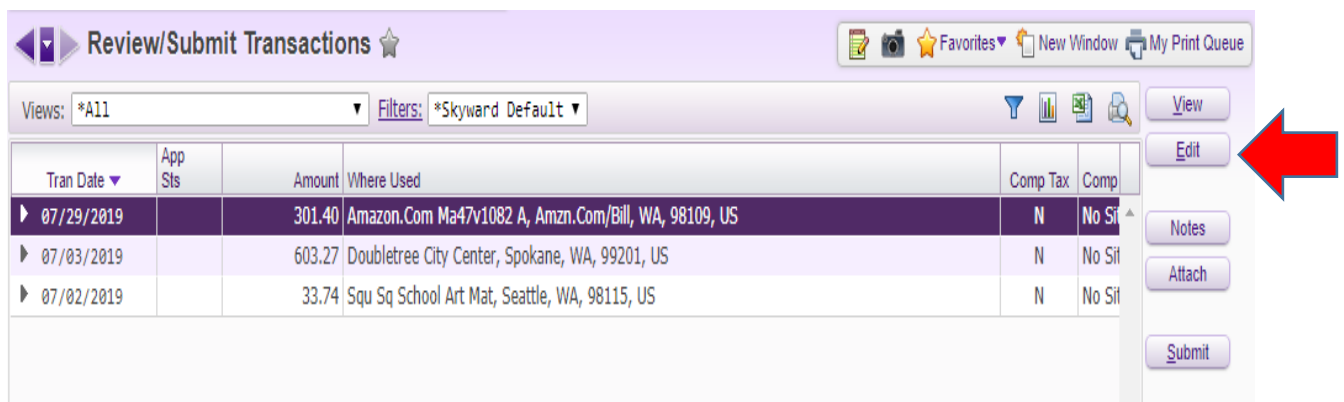
If a department card is being used you will want to make sure you have a Pcard Authorization to Purchase form is completed by the person who is making the purchase. This will need to be signed by the budget administrator BEFORE the purchase is completed and kept on file in the office. Make sure that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

Credit Card Transaction Maintenance

Credit Card Transaction Master

Card Number: *****00111160 [Edit Master](#) [Notes](#) [Attachments](#)

District Card Name: BUSINESS SERVICES 1

Used By:

Where Used: Seattle Pacific Univer, 206-2812066, WA, 98119, US

Description:

Purchasing Vendor:

Transaction Date: 08/02/2019 Tran ID: 70

Status: Batch BMO Tran ID: H72120190805qvqphusbt

Master Amount: 1,000.00

Detail Amounts: 1,000.00

Remaining Amount: 0.00

[Submit for Approval](#)
[Save and Finish Later](#)
[Select from PO](#)
[Help](#)

Transaction Detail Lines

Views: General Filters: *Skyward Default

Line #	Description	Amount	Account(s)	Invoice	PO Num
1		1,000.00			

[Add](#) [Edit](#) [Delete](#) [Clone](#) [Mass Add Accounts](#)

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.

Credit Card Detail Transaction Maintenance

Detail Transaction Maintenance

Total Transaction Amount: 1,000.00

Amount Remaining: 0.00

Line Number: 1

Detail Amount: 1000.00

Description:

PO Number: 0000000000

PO Line: 0

Quantity: 0

Catalog:

Unit Meas:

Unit Cost: 0.00000

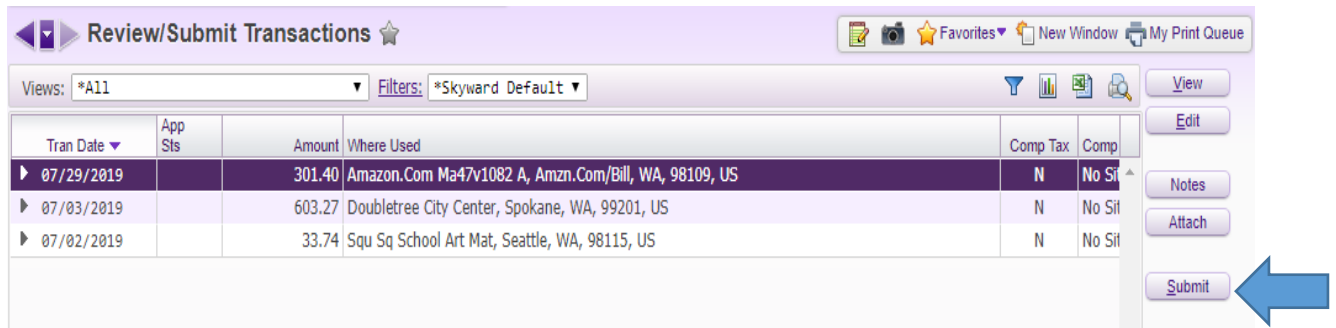
[Save](#) [Back](#)

Detail Line Accounts

[Account Distribution](#)

	Amount	Percent
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
Display More Accounts	0.00	0.00
Total:	0.00	0.00

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.



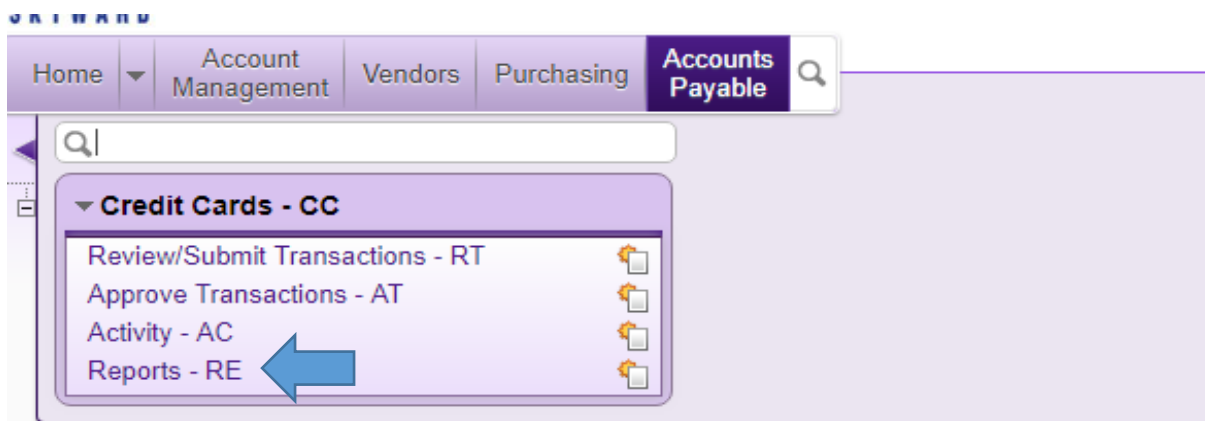
Review/Submit Transactions

Views: *All Filters: *Skyward Default

Tran Date	App Sts	Amount	Where Used	Comp Tax	Comp
07/29/2019		301.40	Amazon.Com Ma47v1082 A, Amzn.Com/Bill, WA, 98109, US	N	No Sit
07/03/2019		603.27	Doubletree City Center, Spokane, WA, 99201, US	N	No Sit
07/02/2019		33.74	Squ Sq School Art Mat, Seattle, WA, 98115, US	N	No Sit

Buttons: View, Edit, Notes, Attach, Submit

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.



Home Account Management Vendors Purchasing Accounts Payable

Search: Q|

Credit Cards - CC

- Review/Submit Transactions - RT
- Approve Transactions - AT
- Activity - AC
- Reports - RE