Cardholder Transaction Approval Process

(Allocating my transactions)

Select Transaction Management.

You may also be able to select an account from the Account Activity box.

Click the Transaction List link.

On the "Billing Cycle Close Date" select "All" if you want to see all the transaction or select from the cycle close date from the drop down menu. Your transaction would display below.

To view the transactions you can click on the "Approval Status" or "Transaction Dates".

View each of the tabs and follow direction accordingly. Allocate your transaction on the "Allocation" tab with your Index and Account code.

We also suggest that you add "Comments" for each transaction; it will be great reference resources when creating reports.

You can also "Approve" your transaction from the "Summary" tab.
After sending your transaction to your Approver, your transaction status will be “Approved”. At this point, you can “Pull Back” any of your transactions to edit or change them as long as your Approver have not access them. Once your Approver approves your transactions, your transactions status will changes to “Final Approved”.

If you have any questions, please contact the Purchasing department at Ext. 22642 or email them at businesscard@pace.edu or for full tutorial, visit the Financial & Planning website > Business Card Program.