PNC District Purchase Card Approvers Step by Step Guide

www.pncactivepay.com
Log In Screen

Username – same as previous card username

Password – prior to your initial log in you will receive a computer generated password via email from pncactivepay

Organization ID = warren

Log In button

The first time you log in you will get a request for a security code, this will also occur if you are using a different computer than you used at your last log in.

Additional Security Required

We are required to perform additional security validation to verify your identity.

We will email you a Security Code that you will need to enter on the next page in order to access PNC Bank ActivePay.

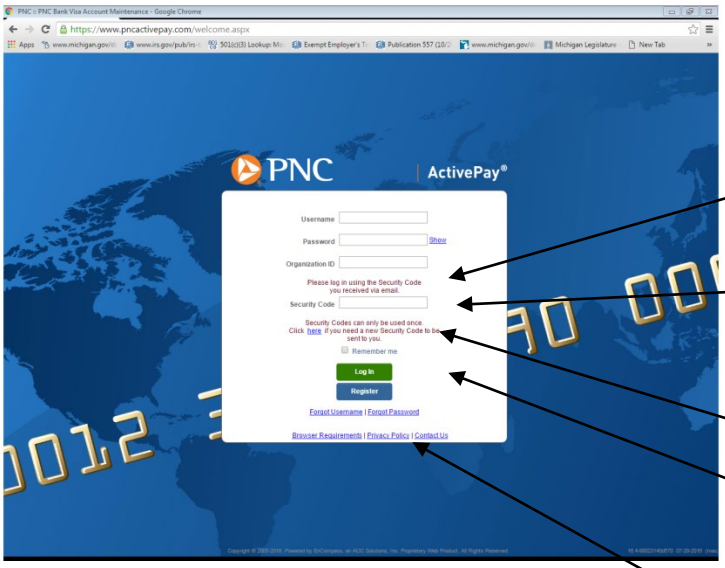
The Security Code will be sent to: Email address in your user account (...@WCSKIDS.NET)

Please allow a few minutes to receive your Security Code.

Send Me a Security Code | Cancel

Select 'Send Me a Security Code'

PNC District <u>Purchase Card Approvers</u> Step by Step Guide



Username – same as previous card username

Password – prior to your initial log in you will receive a computer generated password via email from pncactivepay

Organization ID = warren

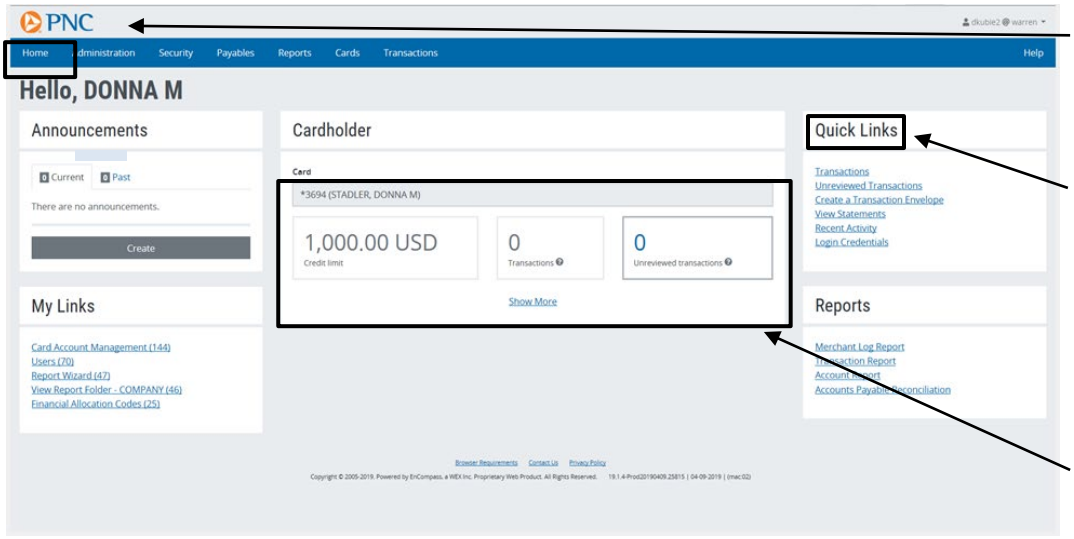
Enter the security code received via email The security code can only be used once THIS IS NOT YOUR PASSWORD

Log In button

You will be required to answer three challenge questions for your account. These questions may be used when the Forgot Username or Forgot Password are used.

PNC District Purchase Card Approvers Step by Step Guide

Welcome to the Home Screen

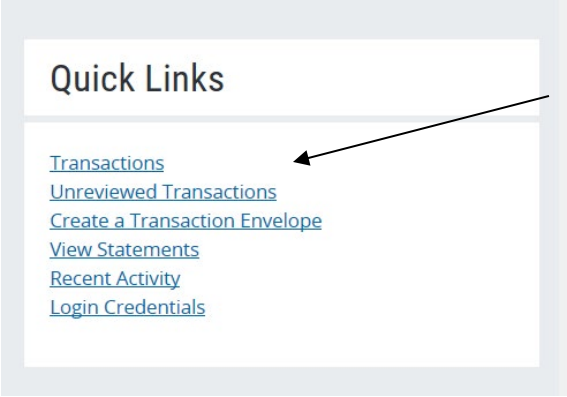


The Home link will always return users to this page

Quick Links – Access the most frequently used screens

Information at a glance – Unreviewed Transactions, Credit Limit, etc.

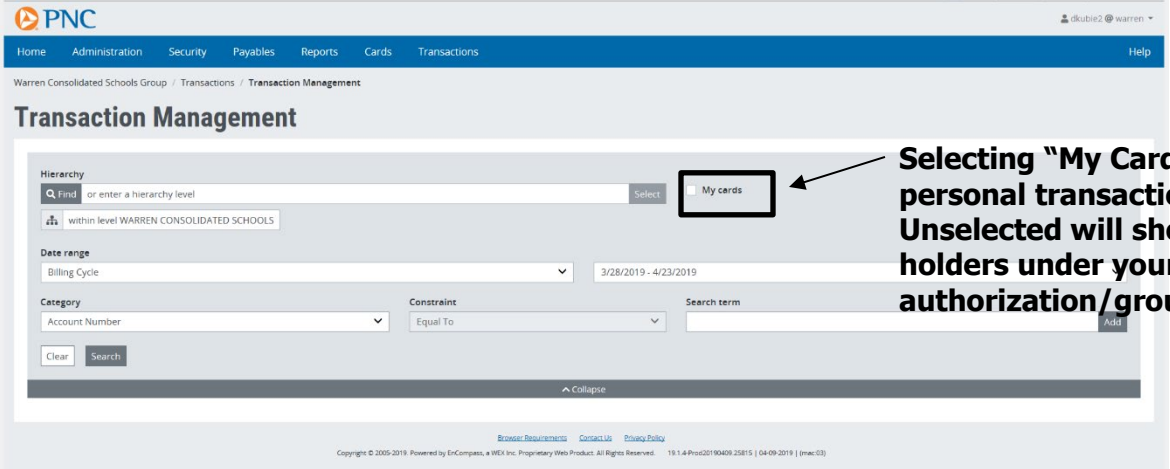
Managing Transactions



Select "Transactions" to review all transactions. Select "Unreviewed Transactions" will allow you to access only those that have not been reviewed.

PNC District Purchase Card Approvers Step by Step Guide

Using the Manage Transactions Quick Link:

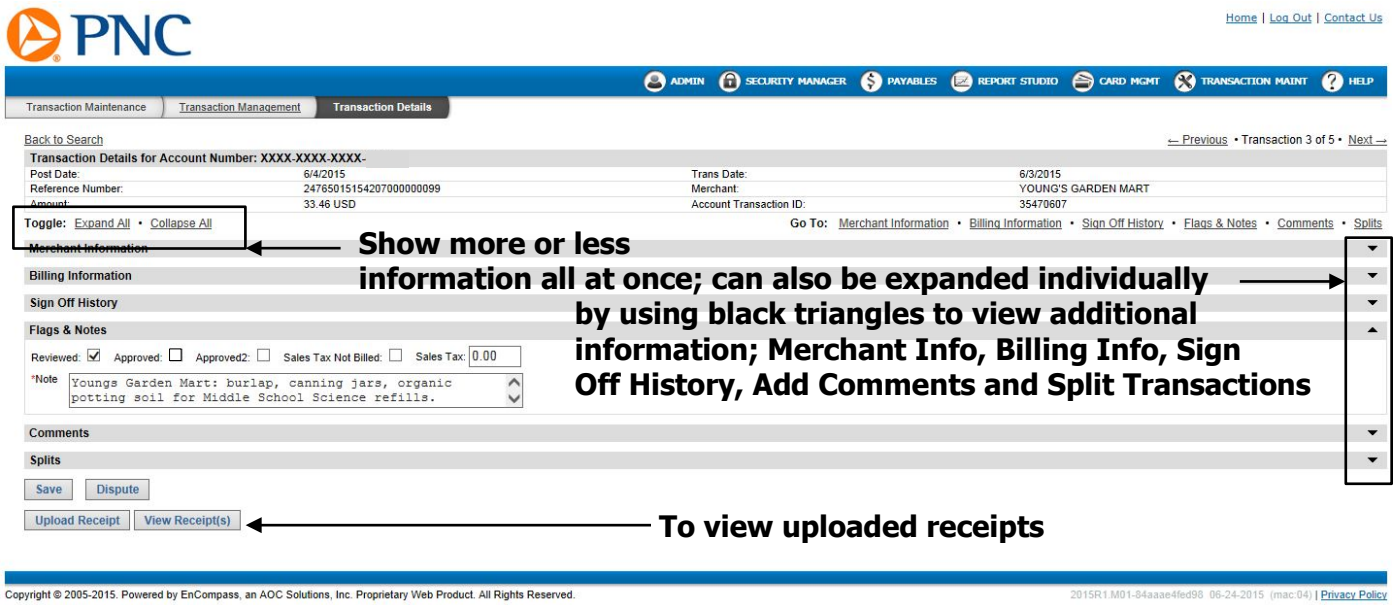


Selecting "My Card" shows your personal transactions. Unselected will show all card holders under your authorization/group.

- View & Edit Transaction Details. The Pencil Icon also displays information for the other action icons.

View and verify that all of the information entered on the Manage Transaction screen by the card holder is correct.

Viewing Transaction Details

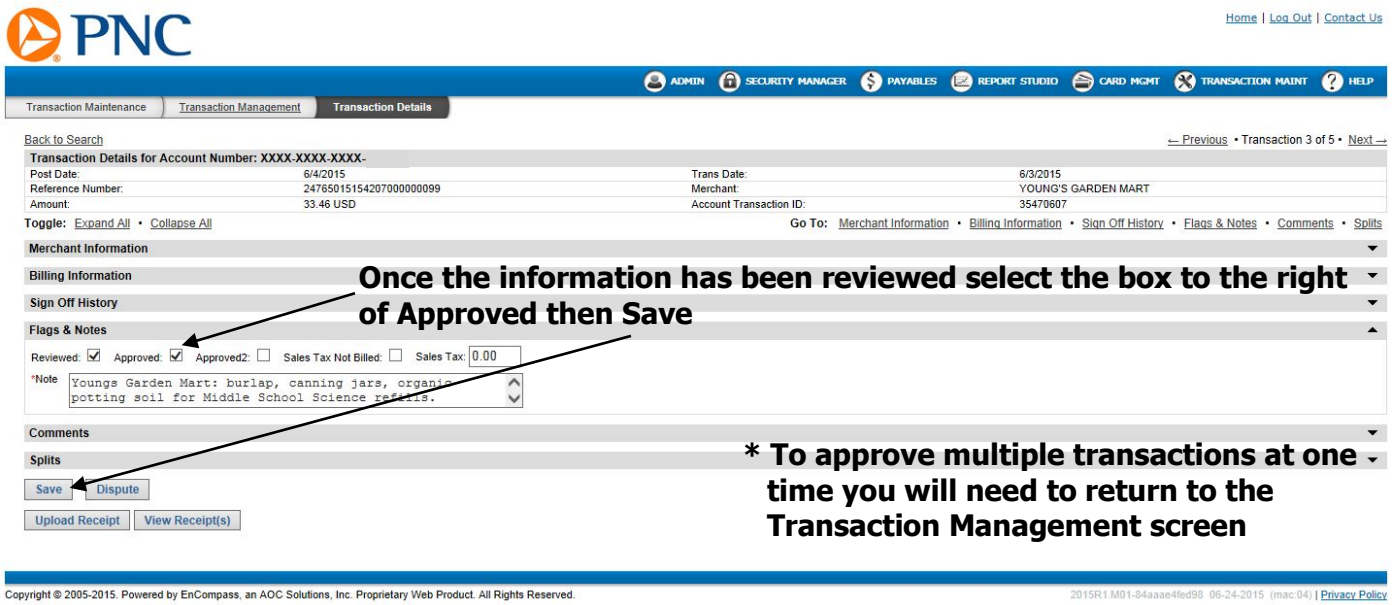


Show more or less information all at once; can also be expanded individually by using black triangles to view additional information; Merchant Info, Billing Info, Sign Off History, Add Comments and Split Transactions

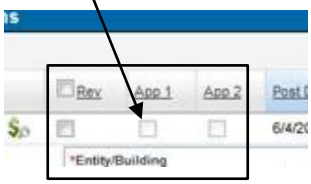
To view uploaded receipts

PNC District Purchase Card Approvers Step by Step Guide

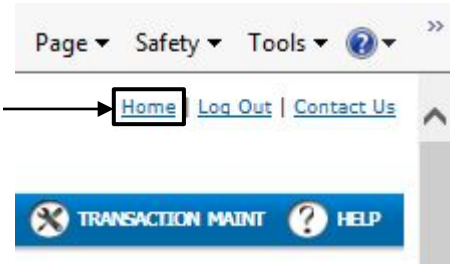
Approving Transaction

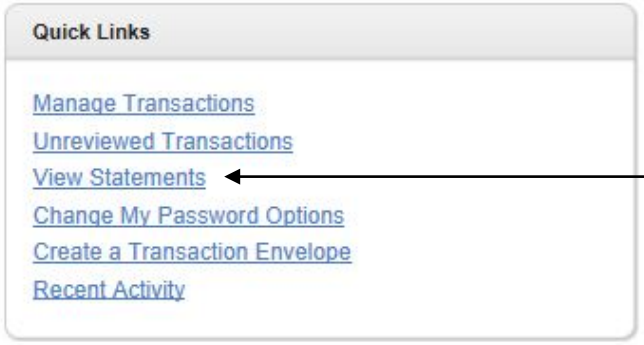


Once you have verified a cardholder's transaction, mark the App 1 box and save before moving on to the next transaction. If you have reviewed all of the transactions you can mark the App 1 box in the title bar to approve all of the transactions at once.



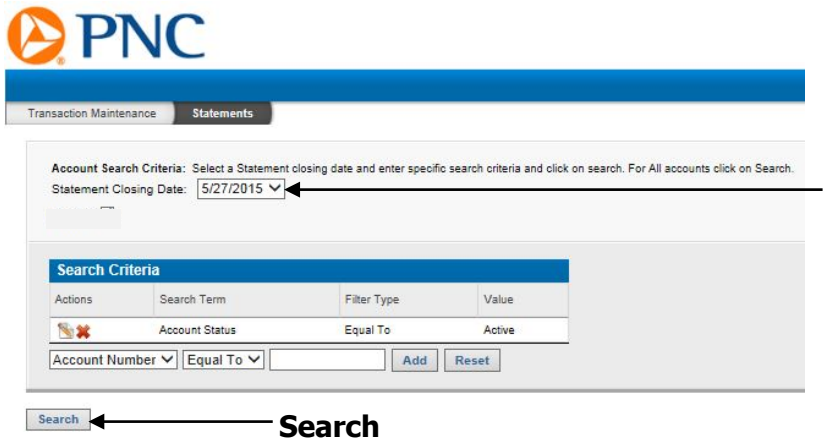
Viewing/Printing Monthly Statements - From Home Screen





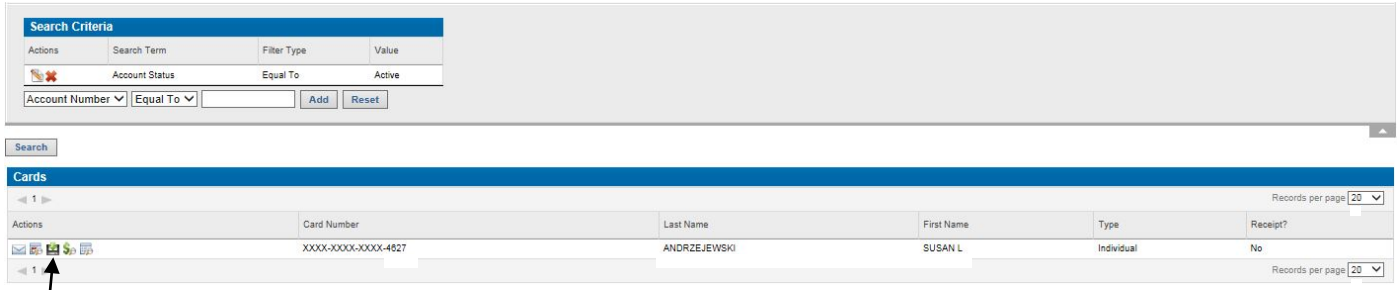
Click on Quick Link to View Statements

PNC District Purchase Card Approvers Step by Step Guide



Select the Statement Closing Date using the drop down menu

Search



Click on the Download Icon

This message will appear at the bottom of the screen:

Select Open to open as a pdf
Save options: Save
Save As
Save and Open

The Billing Cycle runs from the 28th of the previous month thru the 27th of the current month. In the event the Billing Cycle ends on a non-business day, it will default to the next business day.

On a monthly basis the Administrator ("Approver") is required to approve the transactions of all the cardholders in his/her group. Review all transactions and corresponding receipts (required to be scanned and uploaded by Cardholder), verify that the correct Entity/Building and ASN have been assigned to each transaction and that each transaction has been marked 'Reviewed'. The cardholder is responsible to supply all original receipts with the corresponding statement to Accounts Payable within five (5) business days of the Billing Cycle's end date. Failure to do so may result in the inactivation or cancellation of the Cardholder's district purchase card.

Administrators will receive email notifications from PNC when the cardholder has completed the initial review. Administrative approval is required upon receipt of the notification email from PNC no later than the 10th of each month.

For questions regarding purchase cards, please contact the Purchase Card Program Administrator, Traci Elliott (ext. 72130) in Accounts Payable.

PNC District Purchase Card Approvers Step by Step Guide

For a temporary single purchase limit increase please email Sue Andrzejewski at sandrzejewski@wcskids.net CC: Traci Elliott at telliott@wcskids.net and your Administrator.