PNC District <u>Purchase Card Approvers</u> 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'

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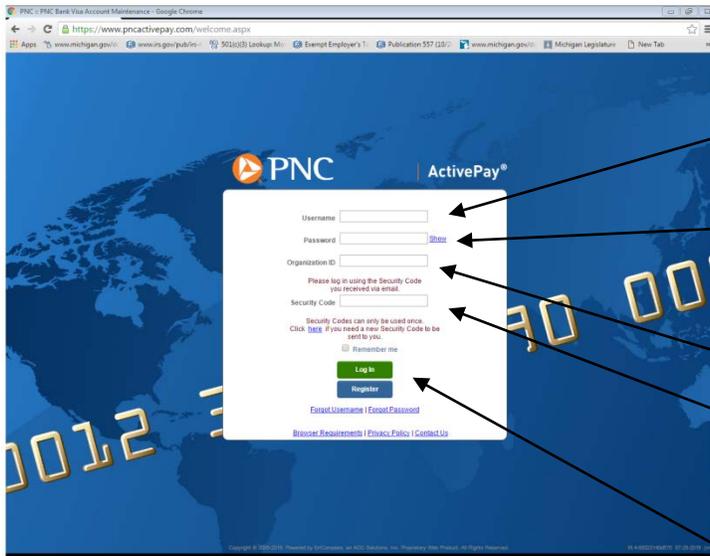
Username – same as previous card username

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.

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Welcome to the Home Screen
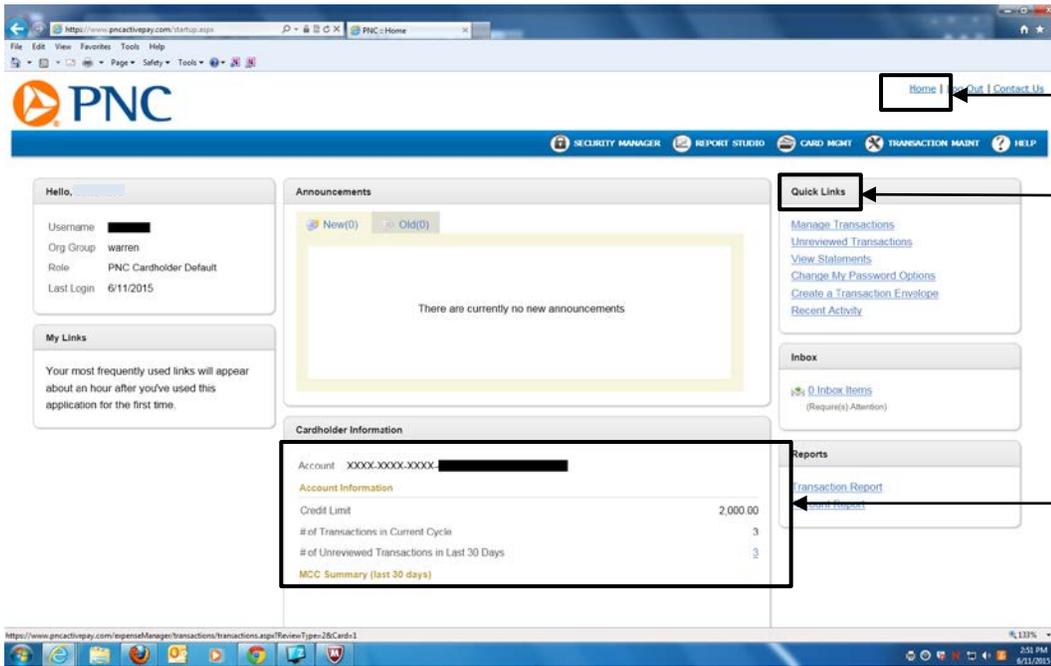
The Home link will return users to this page

Quick Links – Access the most frequently used screens

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

Managing Transactions
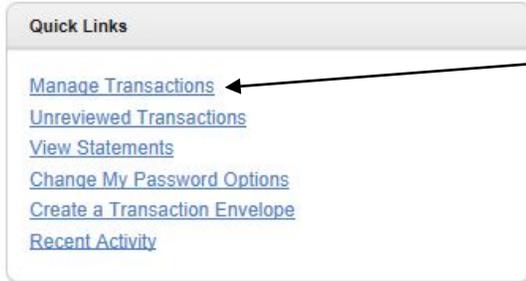
Selecting Manage Transactions will allow you to review all transactions.

Using the Manage Transactions Quick Link:

Select the billing cycle - the current cycle will have the begin date of the cycle to the current date
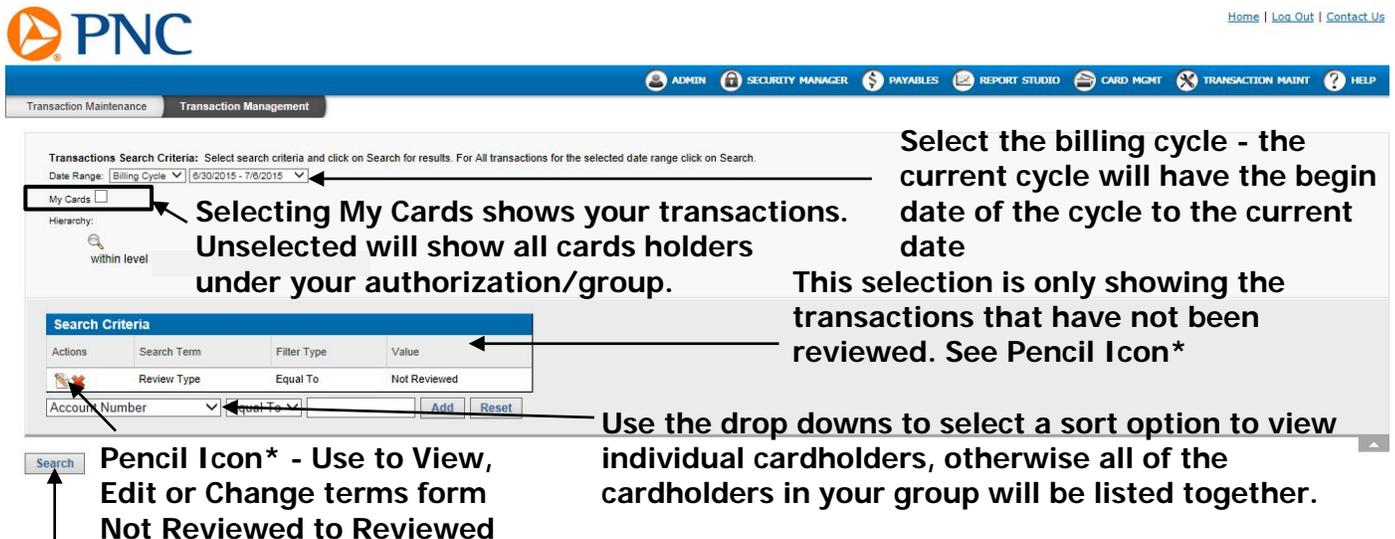
Selecting My Cards shows your transactions. Unselected will show all cards holders under your authorization/group.

This selection is only showing the transactions that have not been reviewed. See Pencil Icon*

Pencil Icon* - Use to View, Edit or Change terms form Not Reviewed to Reviewed

Use the drop downs to select a sort option to view individual cardholders, otherwise all of the cardholders in your group will be listed together.

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Select search once the cycle has been selected
Transaction Details

- 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

Approving Transaction

Once the information has been reviewed select the box to the right of Approved then Save

* To approve multiple transactions at one time you will need to return to the Transaction Management screen

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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.
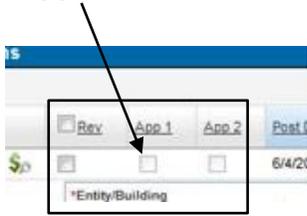
Viewing/Printing Monthly Statements - From Home Screen

Page ▼   Safety ▼   Tools ▼   ?▼   »

Home | Log Out | Contact Us

🅧 TRANSACTION MAINT   ? HELP

Quick Links
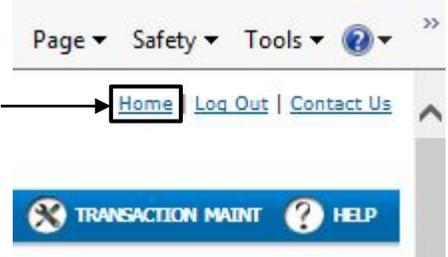
Manage Transactions
Unreviewed Transactions
View Statements ◄———————————— **Click on Quick Link to View Statements**
Change My Password Options
Create a Transaction Envelope
Recent Activity

🔶 PNC

| Transaction Maintenance | Statements |

Account Search Criteria: Select a Statement closing date and enter specific search criteria and click on search. For All accounts click on Search.
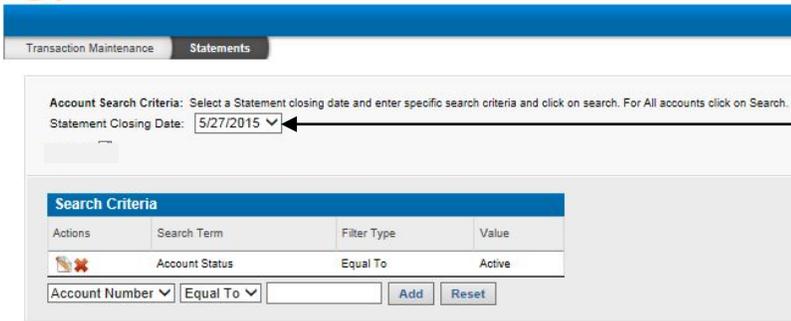
Statement Closing Date: 5/27/2015 ▼ ◄——— **Select the Statement Closing Date using the drop down menu**

Search Criteria

Actions	Search Term	Filter Type	Value
📝✖	Account Status	Equal To	Active
Account Number ▼	Equal To ▼		Add Reset

Search ◄——————— **Search**

Search Criteria

Actions	Search Term	Filter Type	Value
📝✖	Account Status	Equal To	Active
Account Number ▼	Equal To ▼		Add Reset

Search

Cards

◄ 1 ►   Records per page 20 ▼

Actions	Card Number	Last Name	First Name	Type	Receipt?
✉ 📊 💾 💲 📊	XXXX-XXXX-XXXX-4627	ANDRZEJEWSKI	SUSAN L	Individual	No

◄ 1   Records per page 20 ▼

💾 **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**

Do you want to open or save **statement.5_27_2015.pdf** (188 KB) from **pncactivepay.com**?   Open   Save ▼   Cancel   ✖

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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, Donna Stadler (ext. 72130) in Accounts Payable or Sue Andrzejewski (ext. 71110) in Business Services.

For a temporary single purchase limit increase please email John Lettang at JLettang@wcskids.net and CC: Donna Stadler (dstadler@wcskids.net) and Sue Andrzejewski (sandrzejewski@wcskids.net).