# Updating a Pcard Transaction

## How to Update a Transaction in Works
Use the following steps to completely update and sign off on your Pcard transactions in the Works application.

1. **Sign On**
   - [https://payment2.works.com](https://payment2.works.com)
   - (forgot your password? Call x3998 or x8289 to have it reset)

2. **Action Required**
   - Displays the number of transactions on which to sign-off.
   - Click anywhere in the “sign-off” row to expand the list

3. **Select Transaction**
   - Click a particular transaction to display details in the lower portion of the screen

4. **General Tab**
   - Enter sales tax total for transactions charged NC sales tax on this tab.
   - Select ‘Sales Tax Included’ in the Tax Status dropdown
   - If not defaulted, enter the sales tax amount on the ‘Sales Tax Total’ line

5. **Save**
   - Located in the lower left corner of the screen

6. **Allocation Tab**
   - Click ‘Add/Edit’ in the bottom left corner of the screen.

7. **Enter Description**
   - Highlight and delete all pre-filled information
   - Type in your complete business purpose (who, what, when, where, why)

8. **GL**
   - Verify account code defaults and edit if necessary
   - Split charges if needed
   - Click OK

9. **Sign Off**
   - If transaction is complete, click ‘Sign Off’ in the lower right corner of the screen
   - Click OK. The transaction will disappear from the top half of the screen.

Repeat this process on all other transactions requiring sign-off. Once all transactions for a statement period have been updated, complete the following steps to finalize your report:

1. Print Statement report
2. Attach receipts
3. Sign report
4. Obtain managerial approval, if needed
5. Forward to Accounts Payable.

### Related Information
- Producing a Works Statement

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**Financial Services Quick Guide Library**
finance.wfu.edu

**Responsible Unit:**
Procurement Services

**Additional Assistance:**
758-5998 or 758-8289
procure@wfu.edu

**What is it?**
A step-by-step reference for providing necessary information and signing off on Pcard Transactions in the Works application.

**Why it is Necessary**
It is necessary so that Accounts Payable will have the necessary documentation to explain why University funds were used for each transaction.

**Cardholder Customer Service**
Call 866-522-8262 for suspected fraudulent activity, a lost card, verification of charges, or international travel.

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