Purchasing Card Activities
Approving a Credit

Overview:

Understanding the Approving a Credit Process

You may approve a credit once a charge has been disputed and placed in "Verified" status. Once these actions have been completed and the credit is received, the Proxy will then place the charge and the credit in the "Approved" status and notify the P-Card Administrators that the transactions are ready to be vouchered.

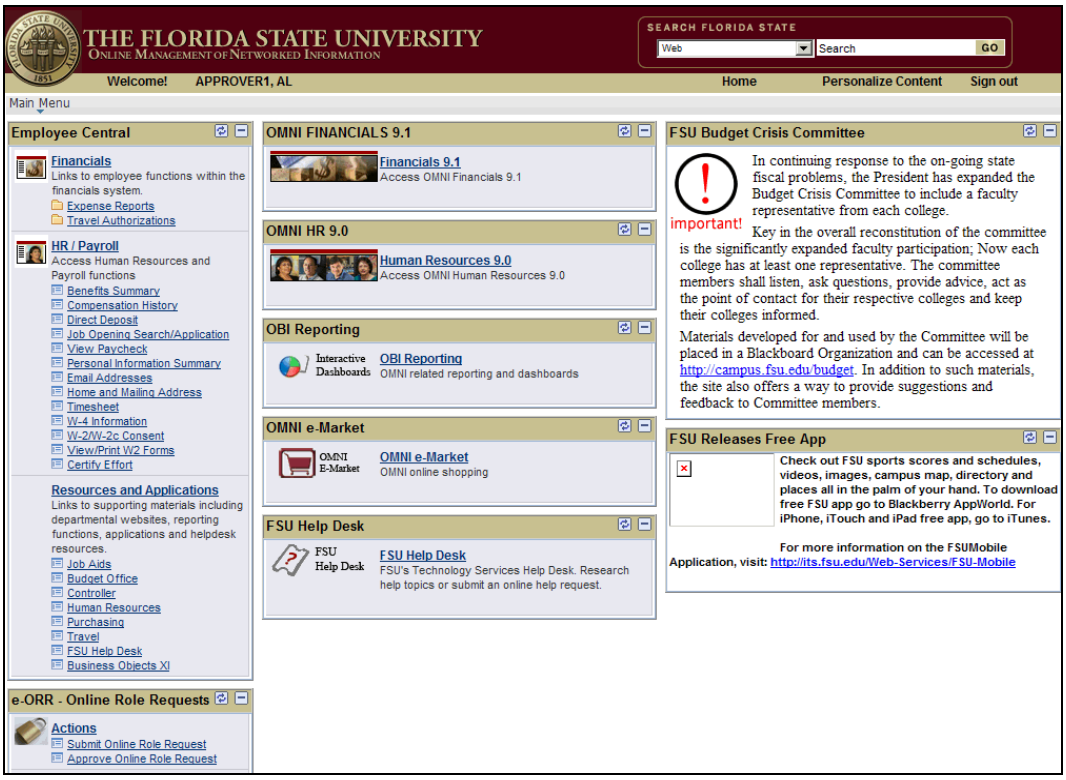
Click here, for more information on the Purchasing Card.

In order to become a Proxy, the Proxy Application and OMNI role, FSU_PO_PCARD_PROXY, are required.

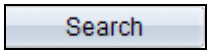
Procedure

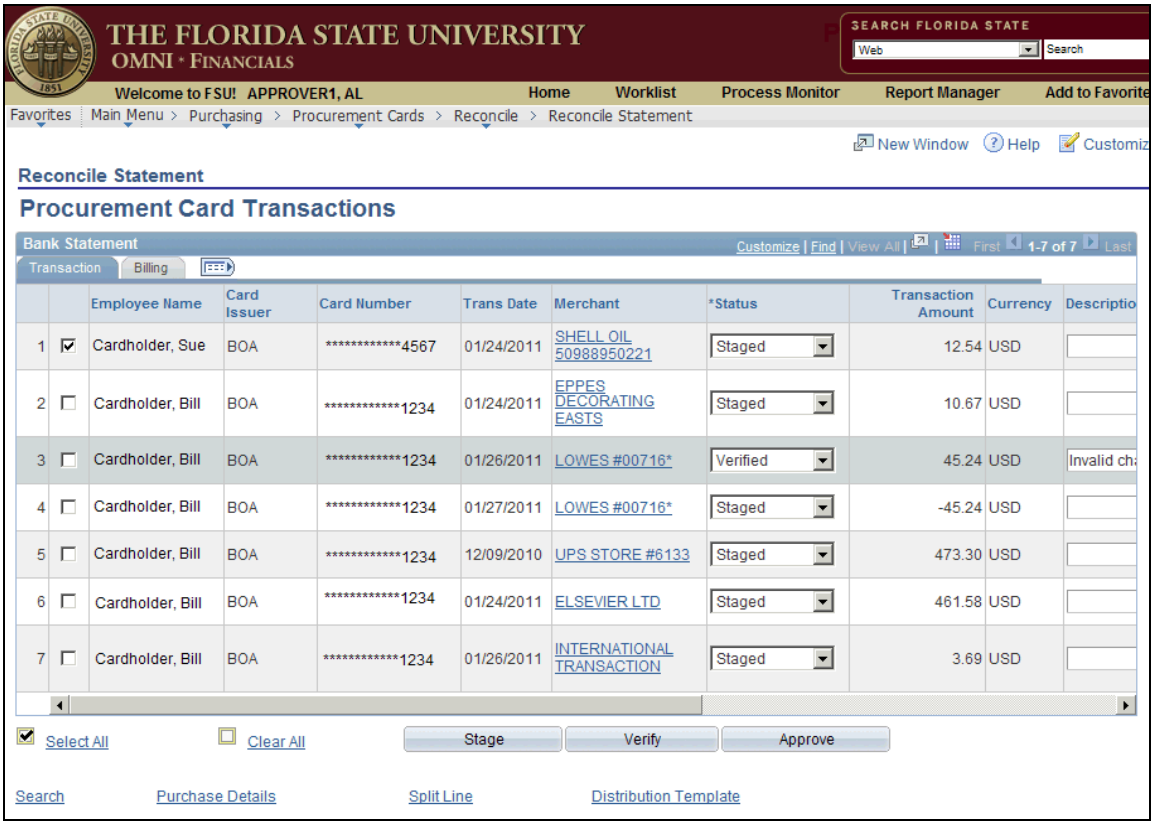
Scenario:
In this topic, you will learn the steps to approve a disputed charge and its corresponding credit on a Purchasing Card.

Key Information:
Cardholder Employee ID

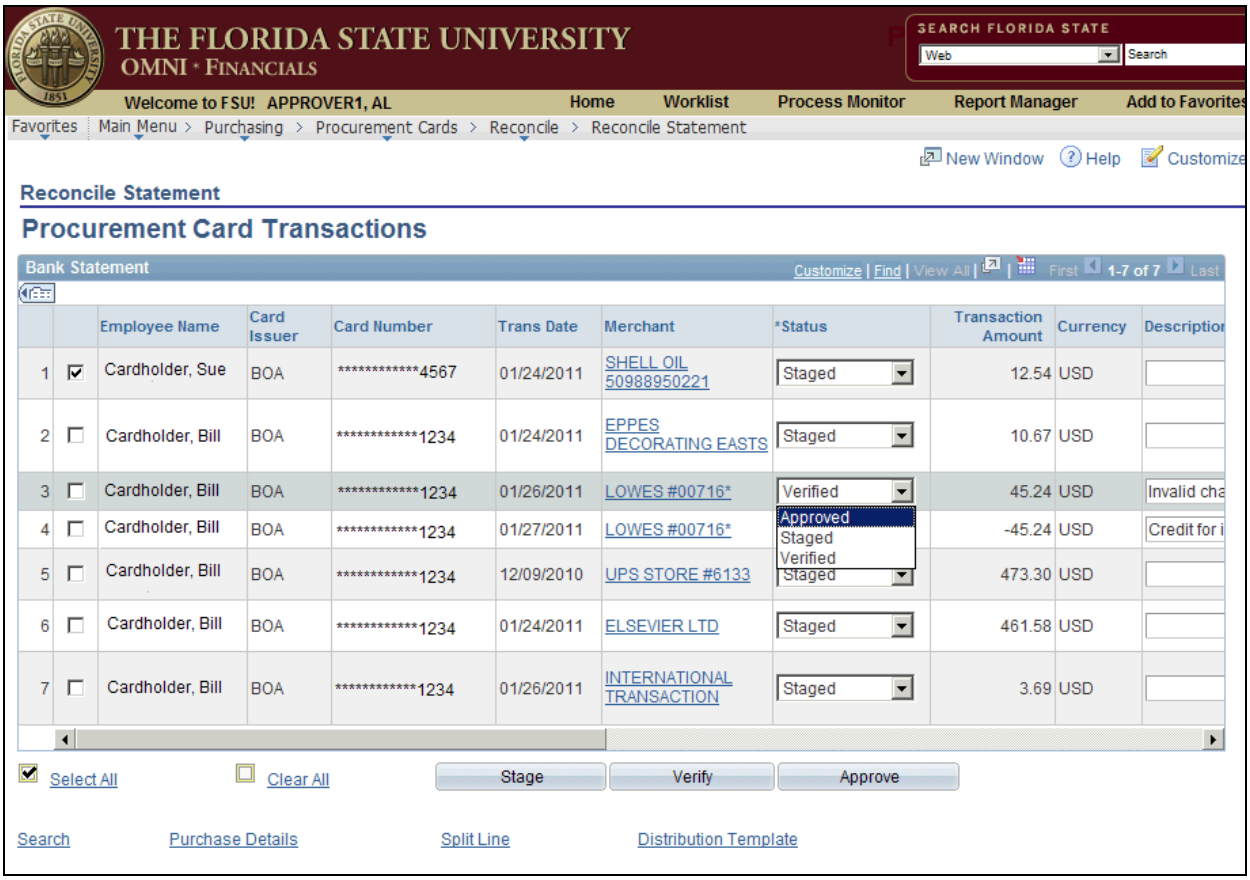


Step	Action
1.	Click the **Financials 9.1** link. Financials 9.1
2.	Click the **Main Menu** button. Main Menu
3.	Click the **Purchasing** menu. Purchasing
4.	Click the **Reconcile** link. Reconcile
5.	Click the **Reconcile Statement** link. Reconcile Statement
6.	If you have more than one cardholder, you will see this search screen. You can use the search criteria to look up one cardholder at a time or click **Search** to see all cardholders at once. If you only have one cardholder, you will automatically be routed to their transactions.

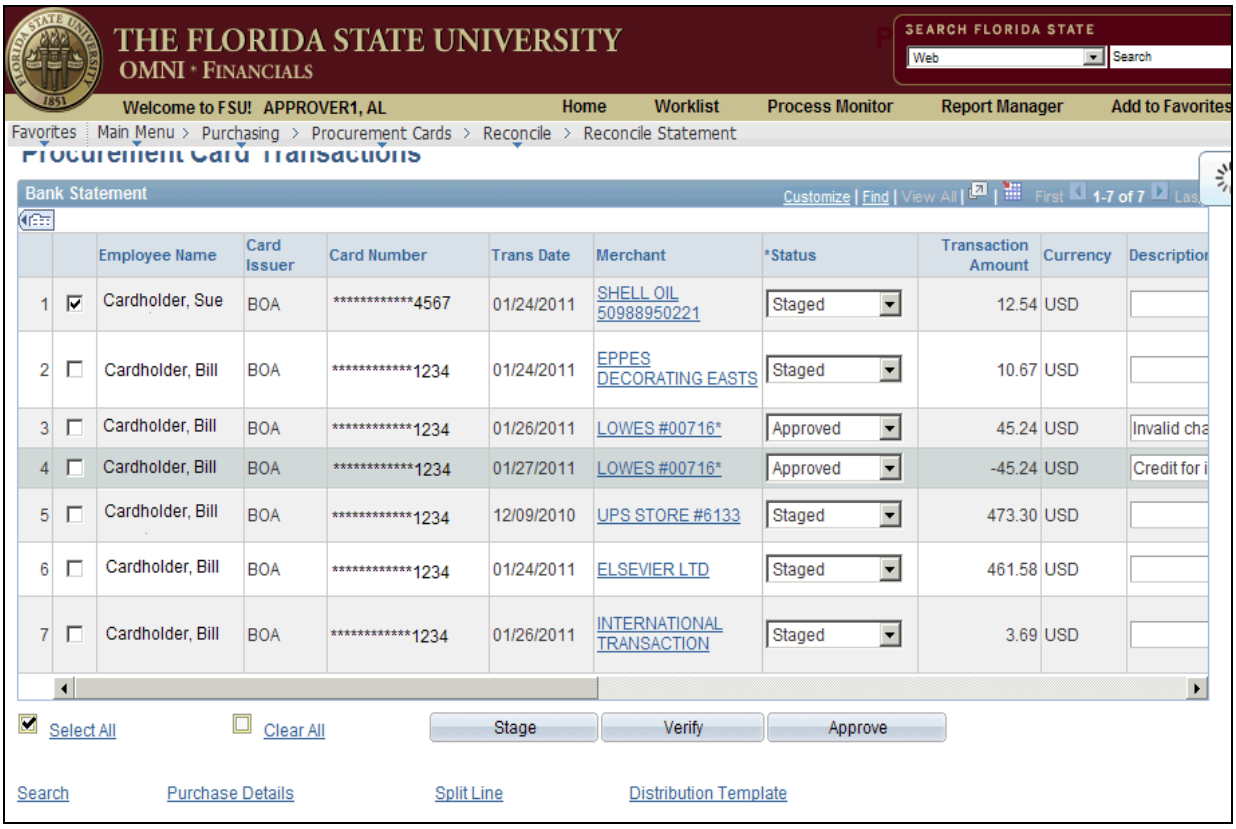
Step	Action
7.	Click the **Search** button. 



Step	Action
8.	Click the **Show all columns** button.
9.	You will not need to change the budget distribution.The charge and the credit should be automatically allocated to the same default budget.
10.	Enter a brief description for the credit into the **Description** field.
11.	Click the scrollbar to scroll to the right side of the page.
12.	Clear the **Dispute Amount**.
13.	Click the **Credit Collected** option.
14.	Click the **Status** list for the disputed charge.



Step	Action
15.	Click the **Approved** list item for both the credit ***and*** the invalid charge. Approved



Step	Action
16.	Click the **Save** button. Save
17.	Click the **Home** link. Home
18.	**Congratulations!** You have completed the topic. **End of Procedure.**