Overview

The PCard Purchase Request to Transaction process is made of several steps.

Near the end of the process, the account holder reviews and signs-off on each transaction.

Signing-off now includes the task of attaching documentation of transactions to your purchase requests.
Add columns to display

Before we attach transactions, we need to add two columns to our display.

1. From WORKS [https://payment2.works.com/works/], navigate to Expenses > Transactions.
2. Click the **Columns** menu

3. Check the box(es) for **Attached to Purch Req Name** and/or **Purch Req ID**.

4. Click the **Save** button to add the new column (columns appear on far right).

5. You can click-drag the new **column header** to a different location.
Attach transactions to purchase requests during sign-off of transactions

1. Navigate to Expenses > Transactions.
2. Select transactions(s) to attach.
3. Click the Attach button. A dialog appears.
4. Click the option button for the purchase request that will have transactions attached.
5. Click the Attach button. The dialog closes.
6. Confirm successful attachment, referencing the Attached Purch Req Name column added earlier.
An optional method for attaching transactions to purchase requests, using purchase request details

1. Navigate Expenses > Purchase Requests

2. Click the purchase request menu

3. Select View Full Details. (con't)
Attach Transactions to Purchase Requests

(con’t)

4. Click the **Attach** button. A dialog appears

5. **Select** the transaction(s) to include with the purchase request

6. Click the **Attach** button. The dialog closes.

7. Continue your WORKS tasks or logout.
Closing Purchase Requests

After you have purchased your item(s) and attached transactions, it is time to close the purchase request.

You have two methods for closing out a purchase request. Only one is need to complete the task.

From the Purchase Request View Full Detail screen

1. Click the Actions menu
2. Select Close

From the Purchase Request Open tab.

1. Navigate to Expenses > Purchase Requests > Requester
2. Select the Open tab
3. Check the boxes for the purchase requests to close
4. Click the Close button