

How to allocate and upload document for One Card transactions

How to attach a receipt

1. On the left side of the screen click **“Transaction Management”**
2. Click on **“Transaction List”**
3. Select the appropriate billing cycle date under **“Card Account Summary”**
4. Scroll down to the to your transactions and click on paperclip
 - a. Click on **“browse”**: Find PDF and click open to attached document
 - b. Click the blue **“attach”** button

How to allocate FOPAL

1. Scroll to your transaction; scroll to the right of your screen and click **“add allocations”**
2. Enter your FOPAL **“accounting code”**
 - a. Click **Save**

How to send to Approver once FOPAL and Receipt attached

1. Check the box to the left of the transaction line
2. Click Approve
3. Select Approver **“in blue”**
 - a. Type in **“approver name”**
 - b. Click **“search”**
 - c. Select **“name”**
 - d. Mark the box **“set as default approver”**
 - e. Click **“Approver”**