Works Sign off Guide

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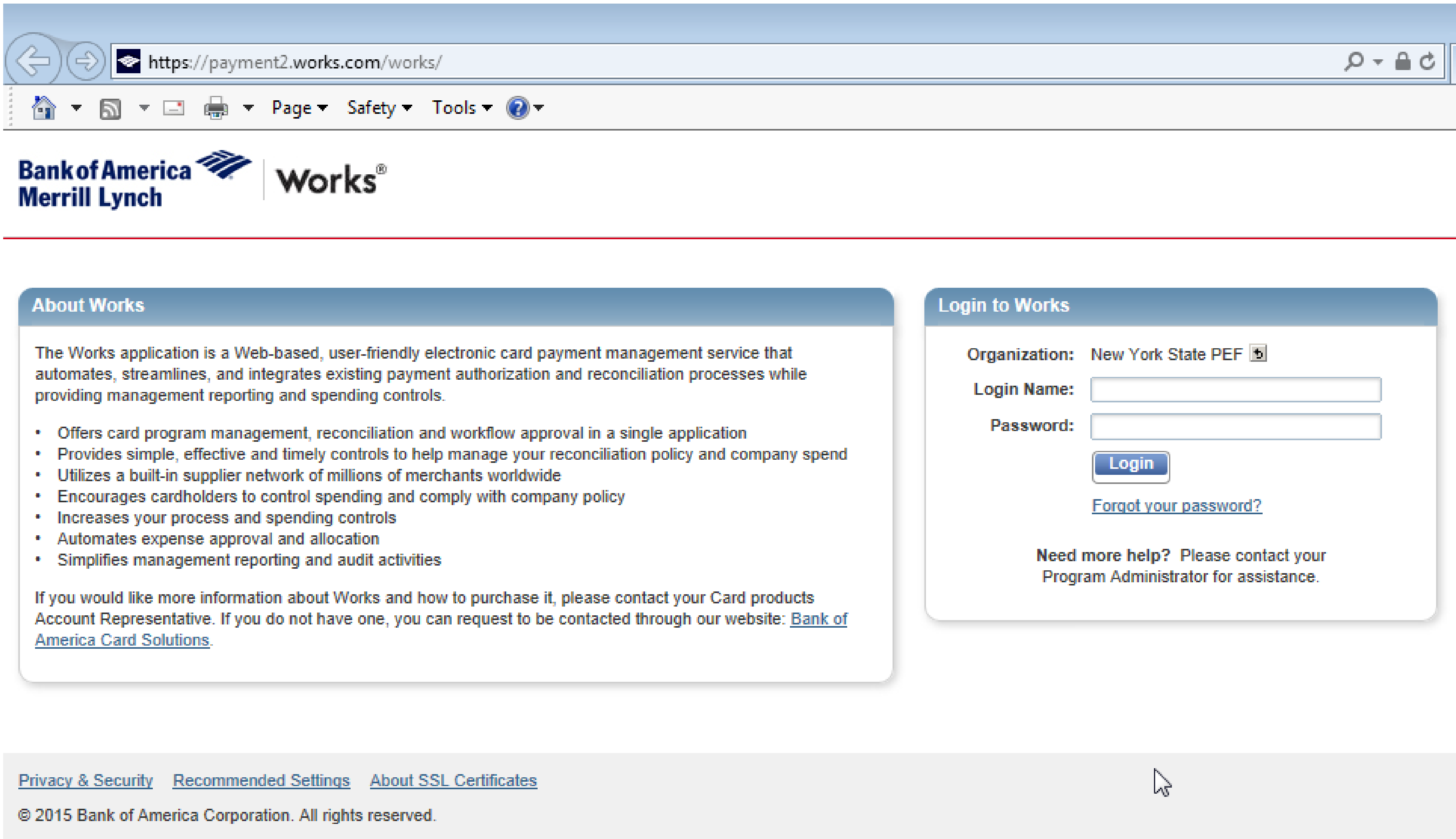
- Use slides 4 through 8 if you are the person that made the purchase
- Once the person that made the purchase completes slides 4 through 8 a second reviewer will use slides 9 through 13 to close the transaction
- Slides 14 and 15 are used to expand the date range. You will need this if you have not signed off on transactions in the last 3 months

Log In to the website **https://payment2.works.com/works**
Enter your credentials that were sent to you by email when you were first set up



Once logged in. On the Home screen click on Sign off, Acting as Accountholder, Transaction, Pending to see purchases you have made.

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Action Items

Action	Acting As	Count	Type	Current Status
	Accountant	2	Purchase Request	Open
Sweep	Accountant	20	Transaction	Pending
Close	Accountholder	1	Purchase Request	Approved - Open
Sign Off	Accountholder	1	Transaction	Pending

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Accounts Dashboard

In Scope

Account Name	Account ID	Credit Limit	Current Balance	Available Credit	% of Credit Limit Used
DOUGLAS WILLIAMS	0761	30,000.00	70.20	29,929.80	0%

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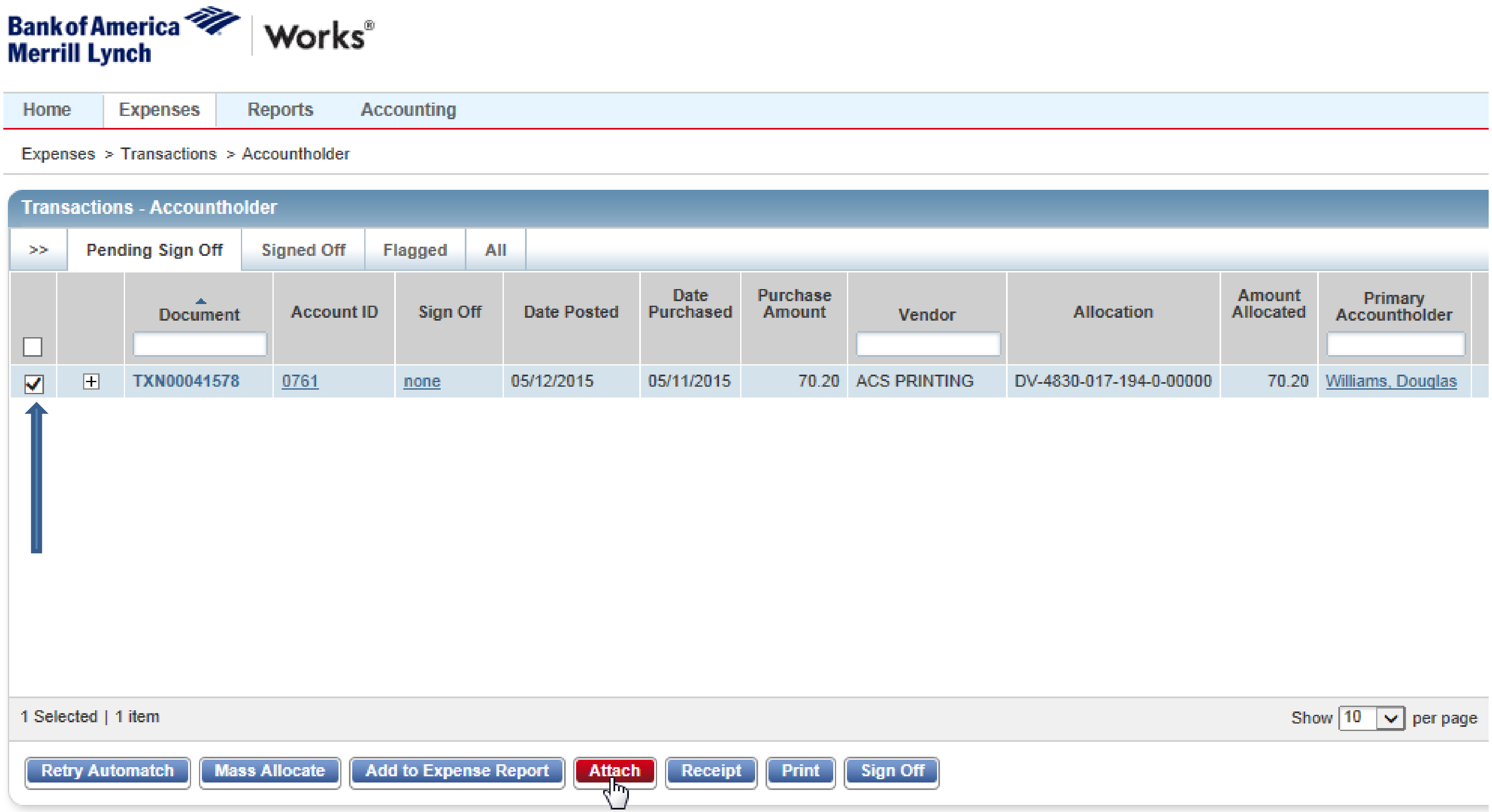
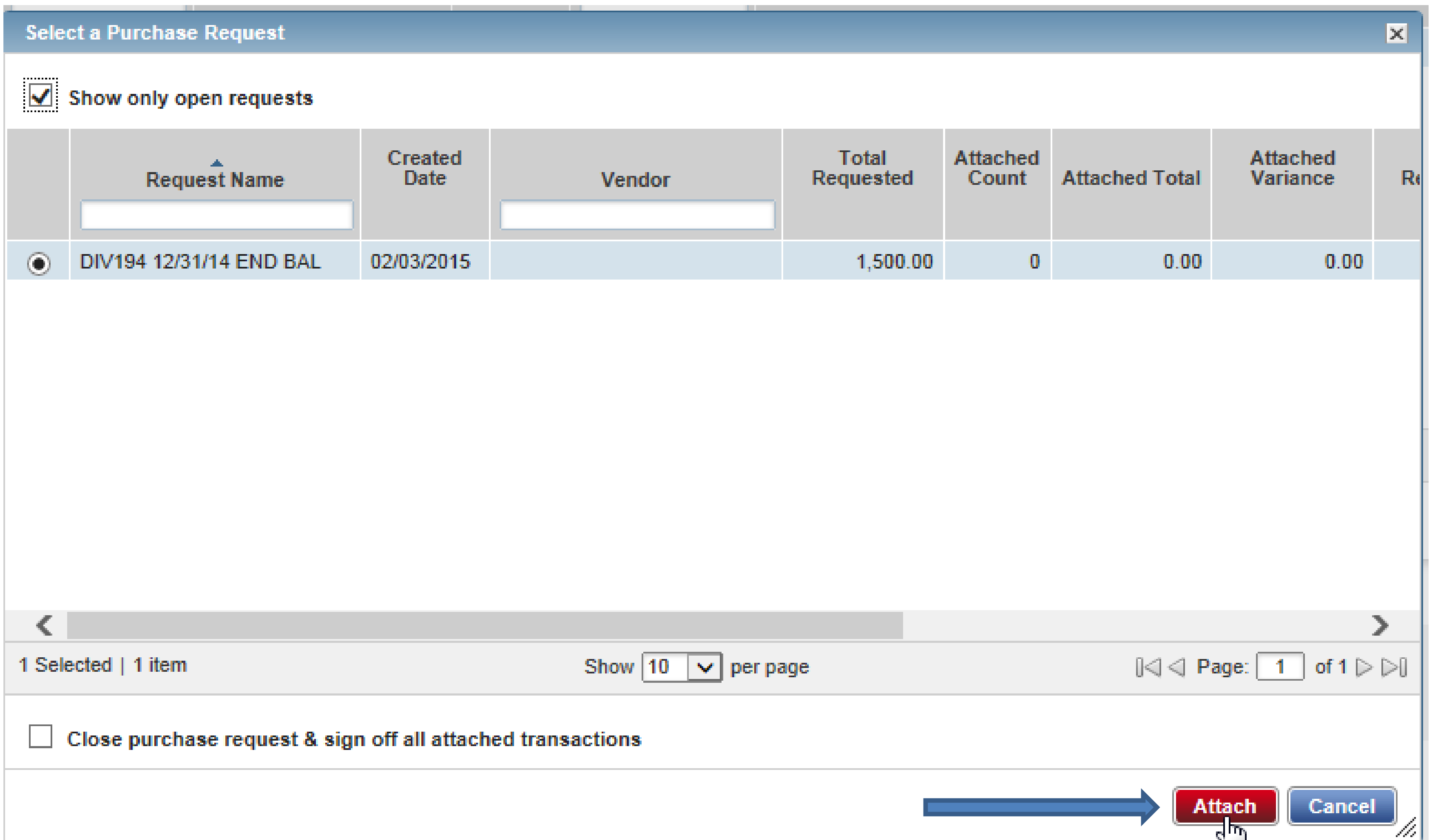
 Your last log in was May 27, 2015, 9:39 AM CDT.

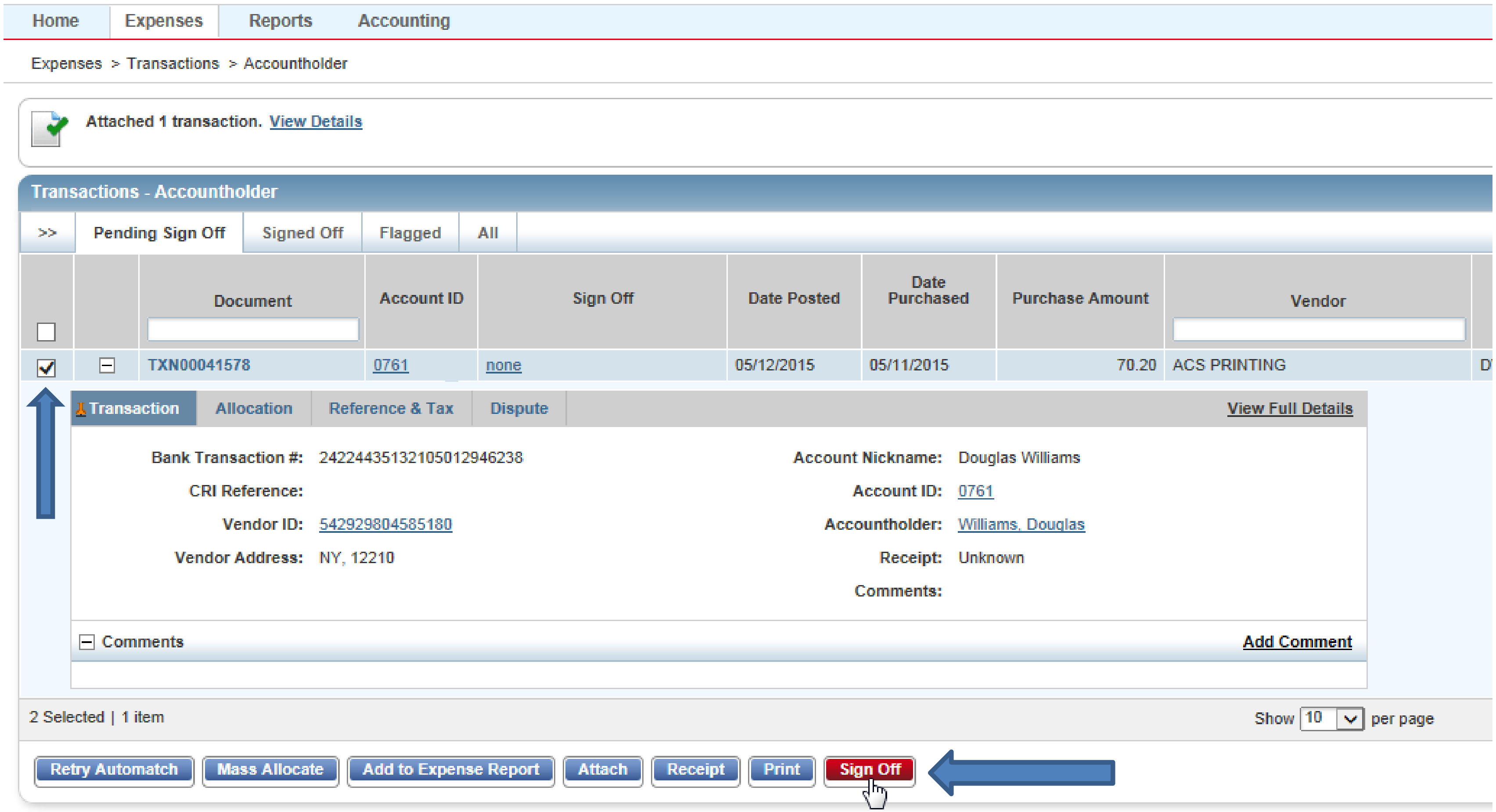
Your card purchases will be listed as TXN's. Once you review them, click the check box on the left of each and hit attach.



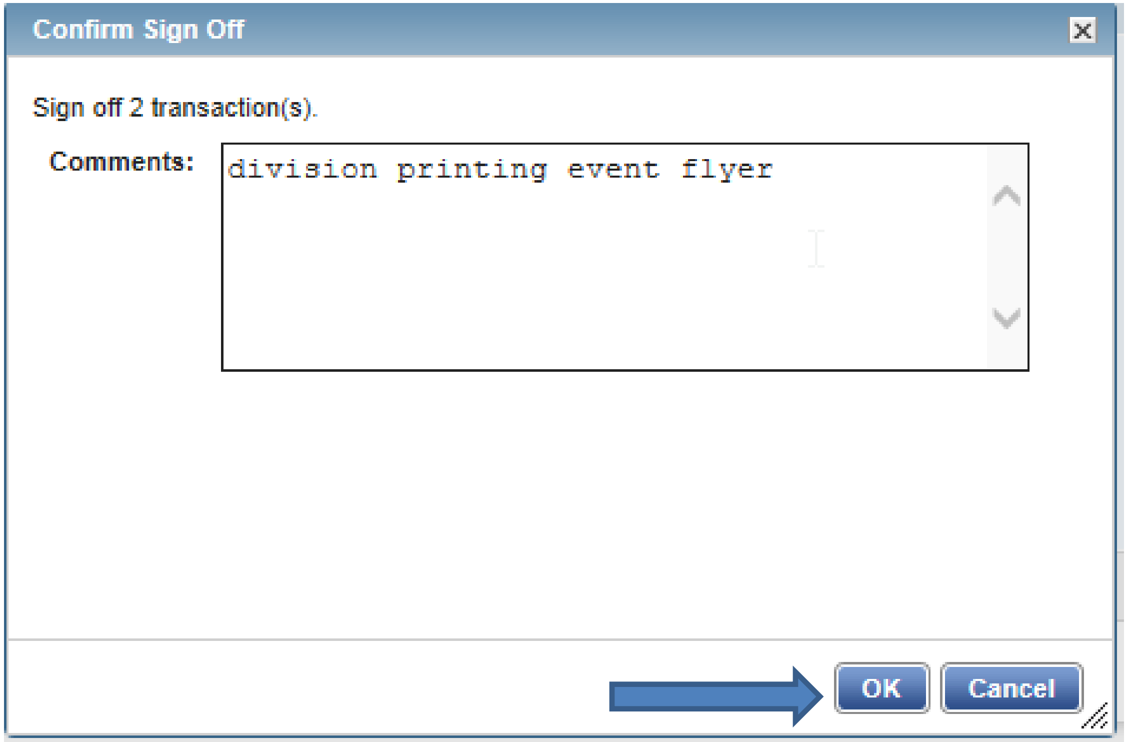
This window will pop up indicating that you want to attach that purchase to the funds that were loaded to your card. Just hit attach again. **DO NOT CHECK THE CLOSE PURCHASE REQUEST BOX THIS WILL CLOSE THE FUNDS ON YOUR CARD AND WILL REQUIRE CONTACTING PEF HEADQUARTERS TO RESTORE.**



You will receive a confirmation it was attached on the upper left. You can now check off that transaction and sign off on it. When you click signoff a window will pop up.

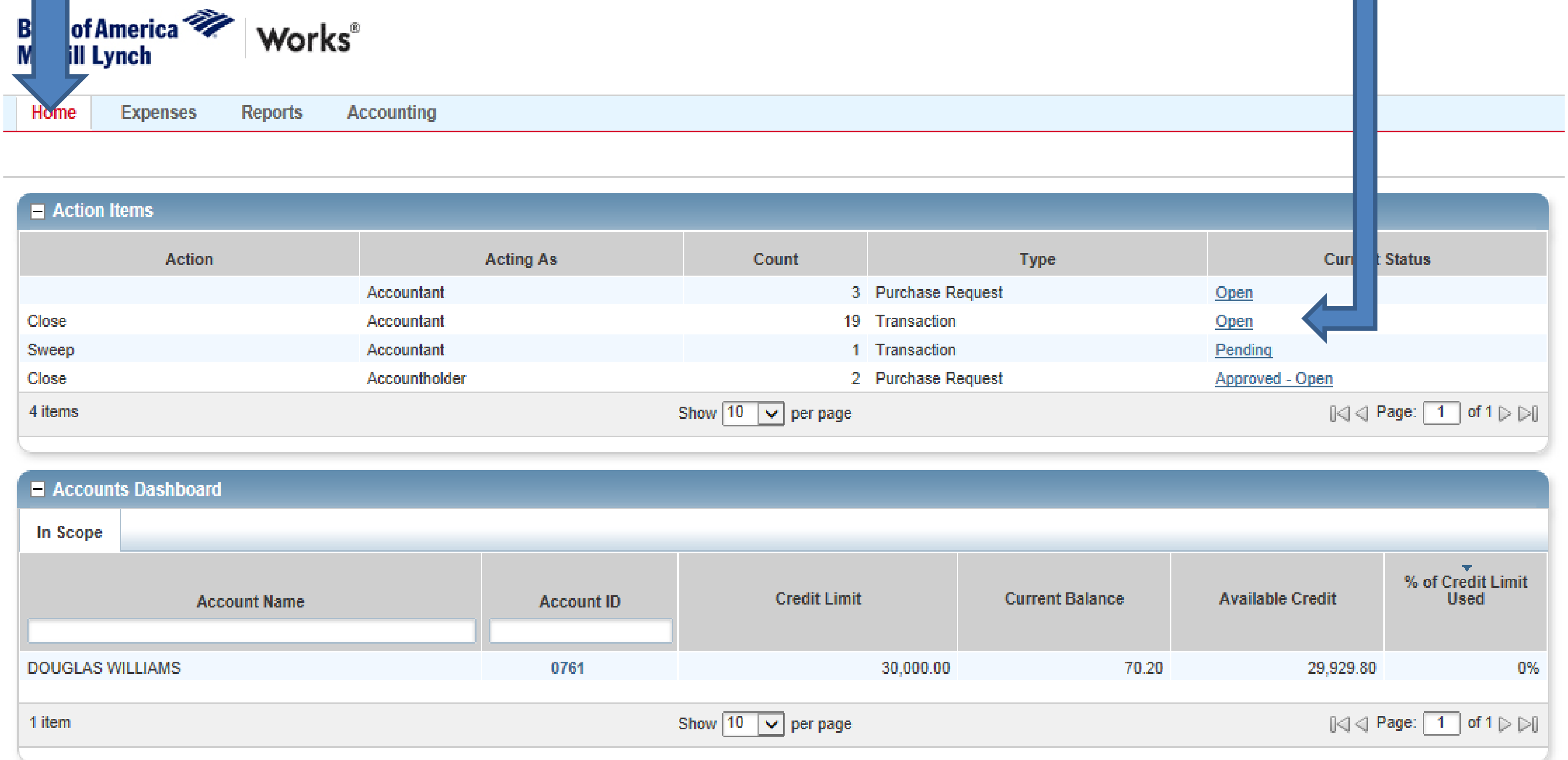


Enter a description for your purchase(your reviewer will be able to read this) and confirm you want to sign off by clicking OK. The transaction will disappear and you will be on the same screen.



Return to the Home Screen

When transactions are available to review by another Accountholder you will see the option Close, acting as Accountant, the Type will be Transaction. Click on open.



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Action Items

Action	Acting As	Count	Type	Current Status
	Accountant	3	Purchase Request	Open
Close	Accountant	19	Transaction	Open
Sweep	Accountant	1	Transaction	Pending
Close	Accountholder	2	Purchase Request	Approved - Open

4 items Show 10 per page Page: 1 of 1

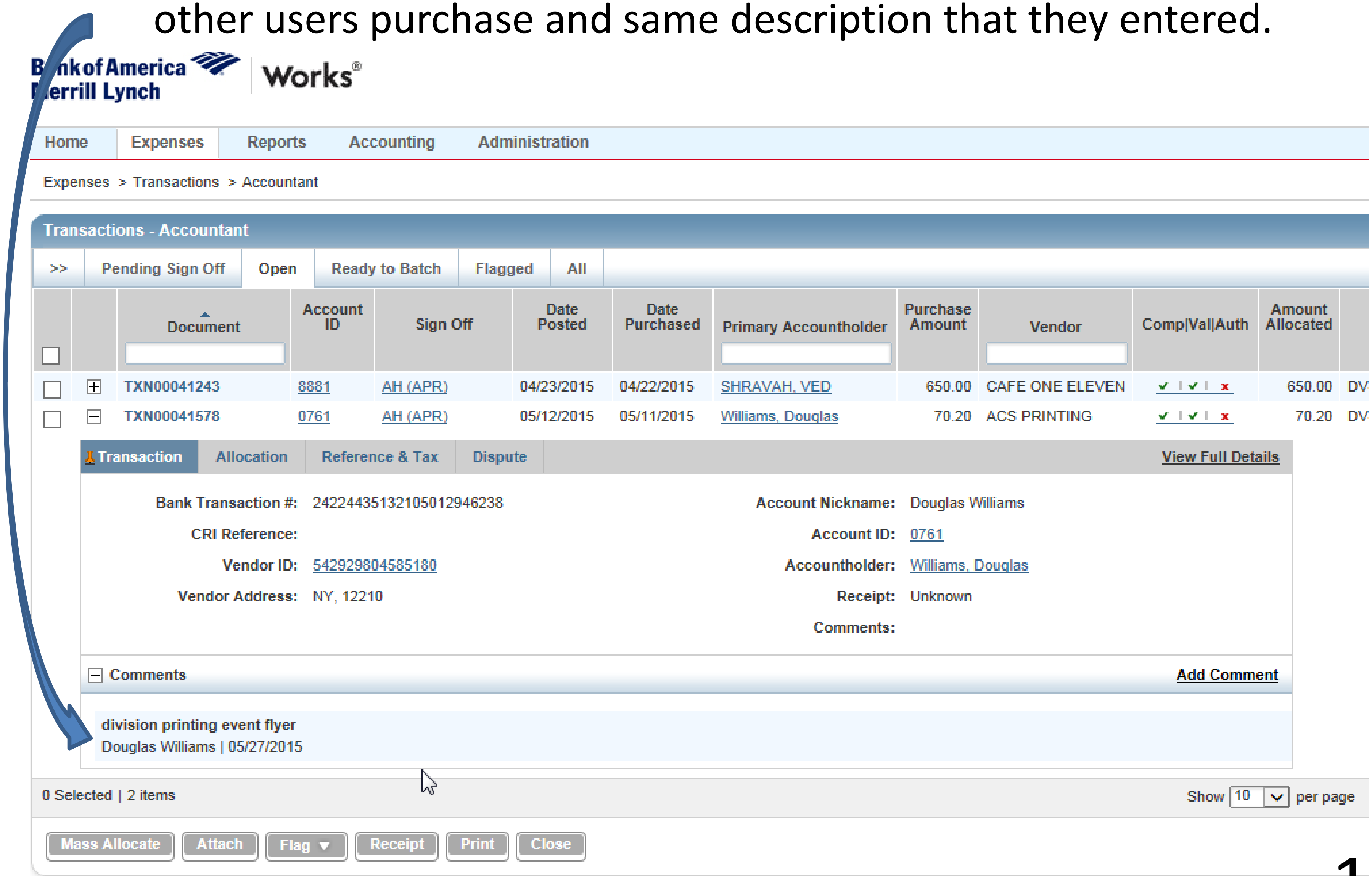
Accounts Dashboard

In Scope

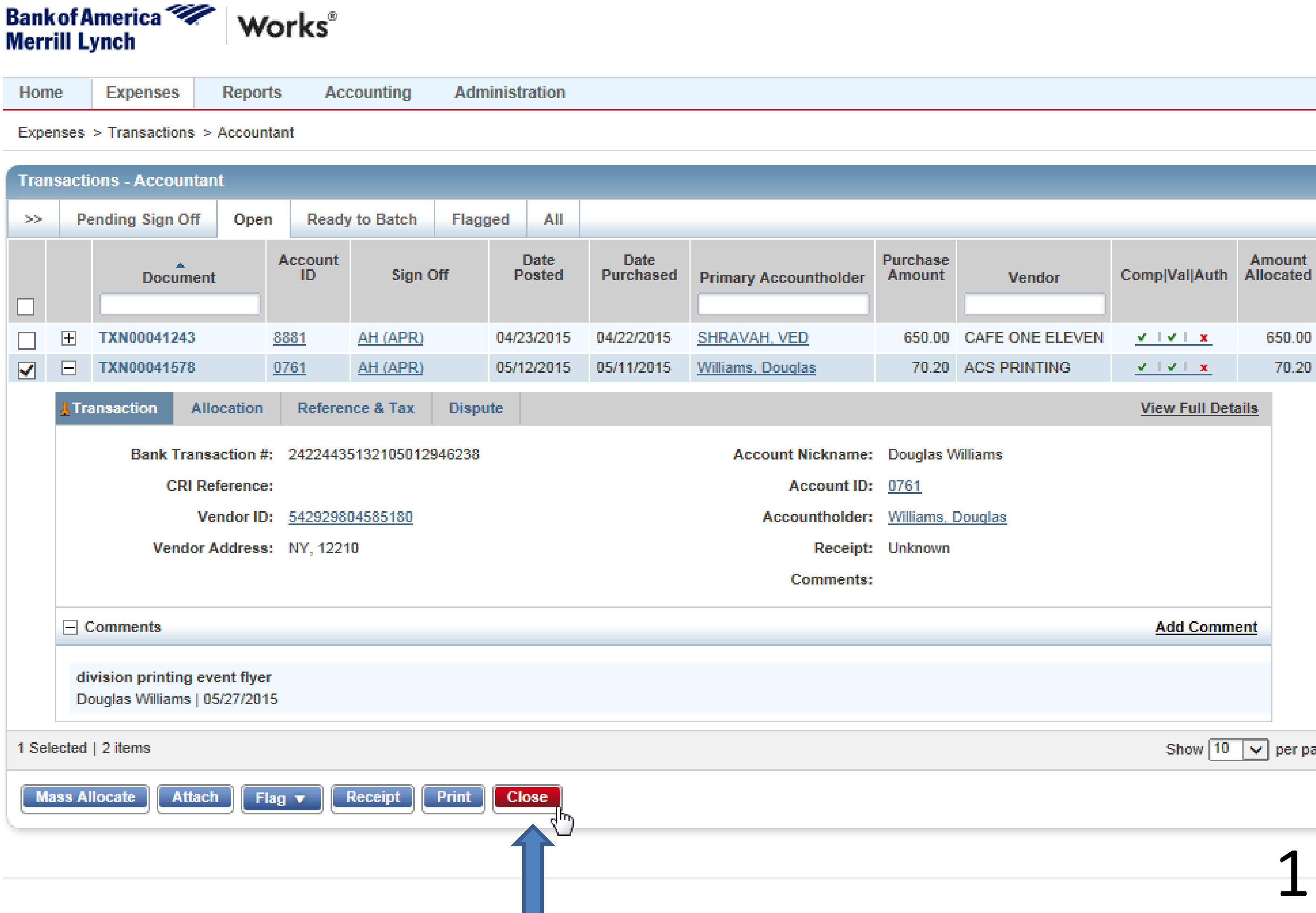
Account Name	Account ID	Credit Limit	Current Balance	Available Credit	% of Credit Limit Used
DOUGLAS WILLIAMS	0761	30,000.00	70.20	29,929.80	0%

1 item Show 10 per page Page: 1 of 1

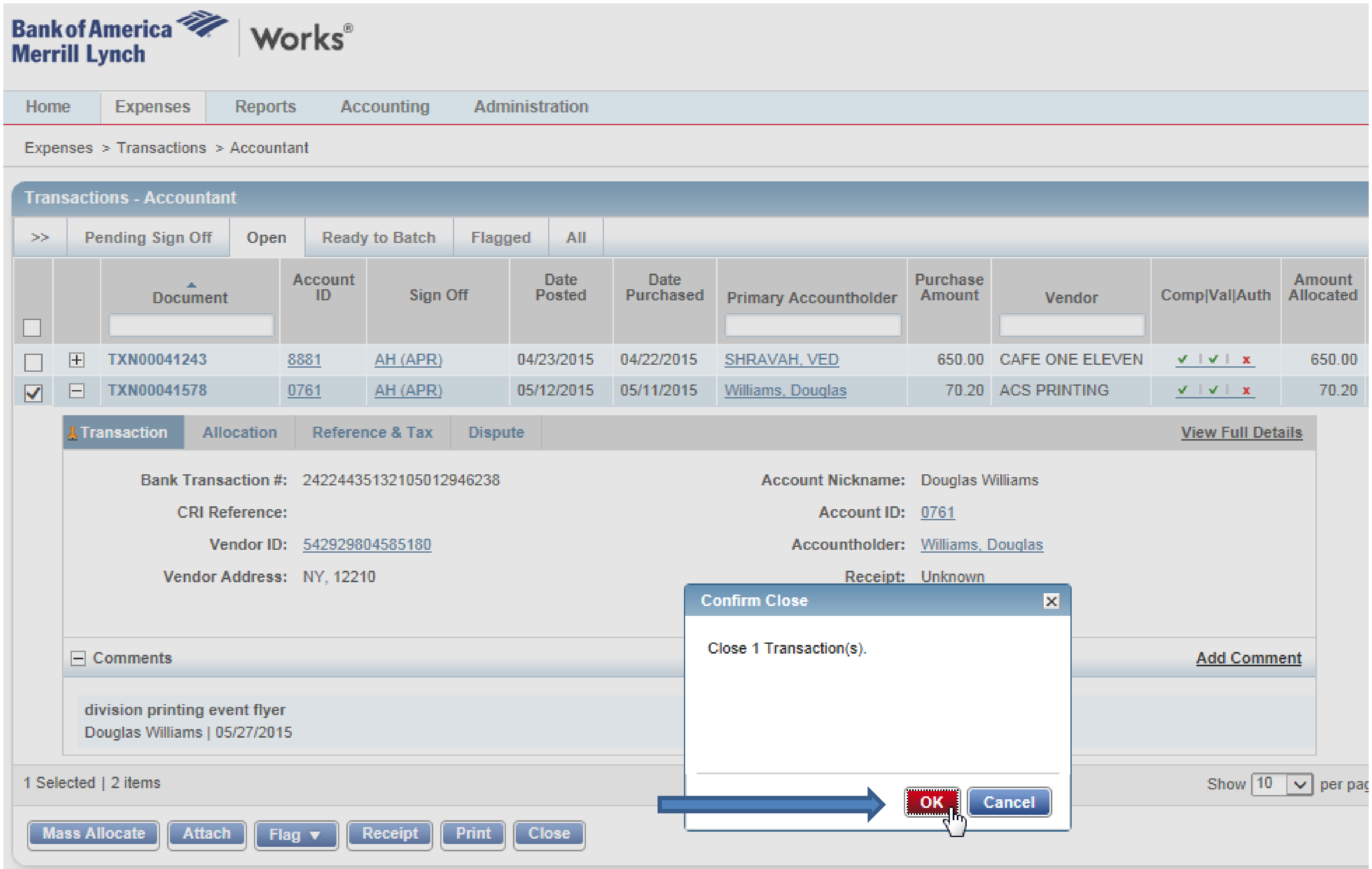
Click on the plus sign to expand the other division users purchase details out and read the purchasers comment. Here we can see the other users purchase and same description that they entered.



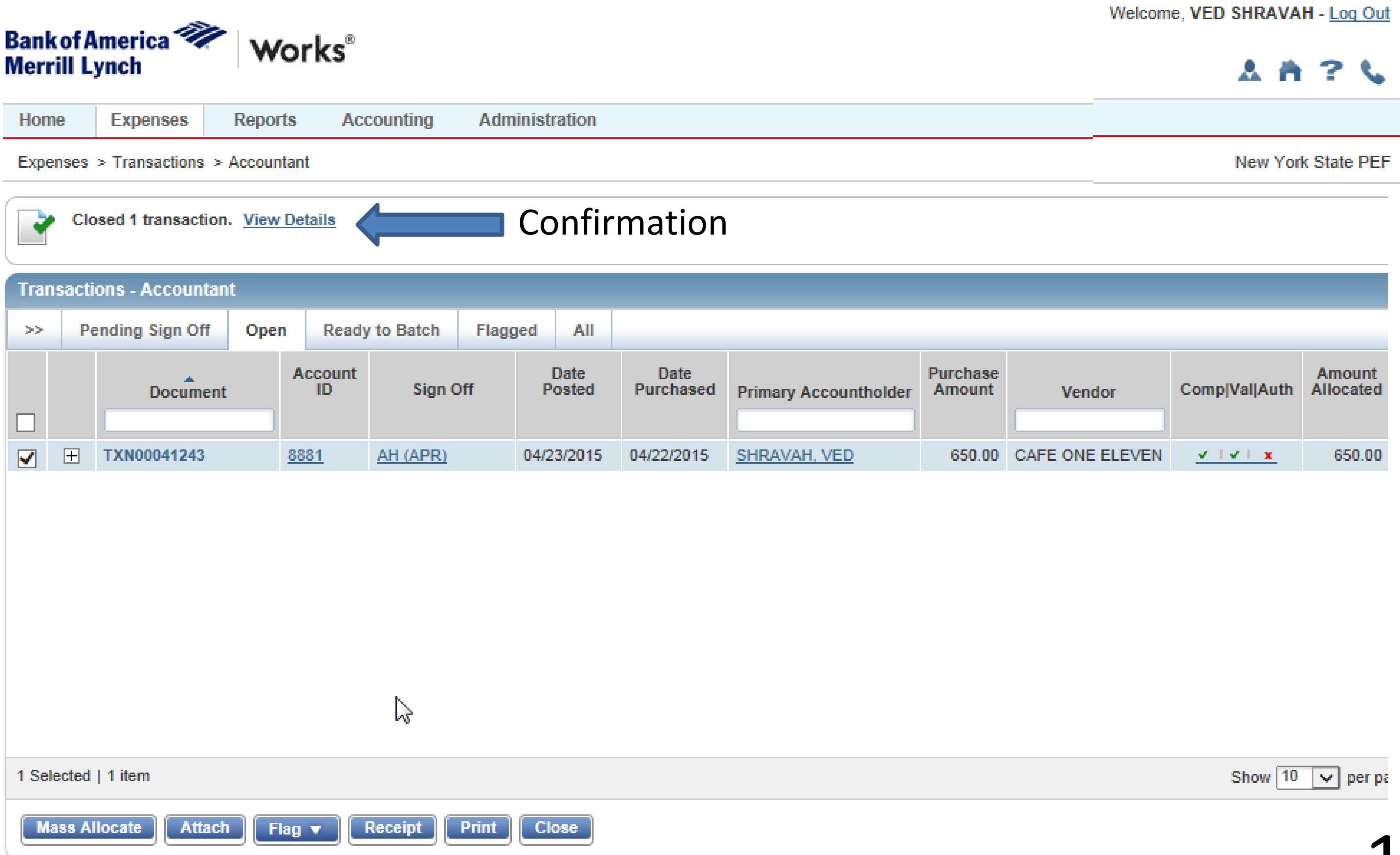
Once you have reviewed and approve the expense check it off and click on Close at the bottom.



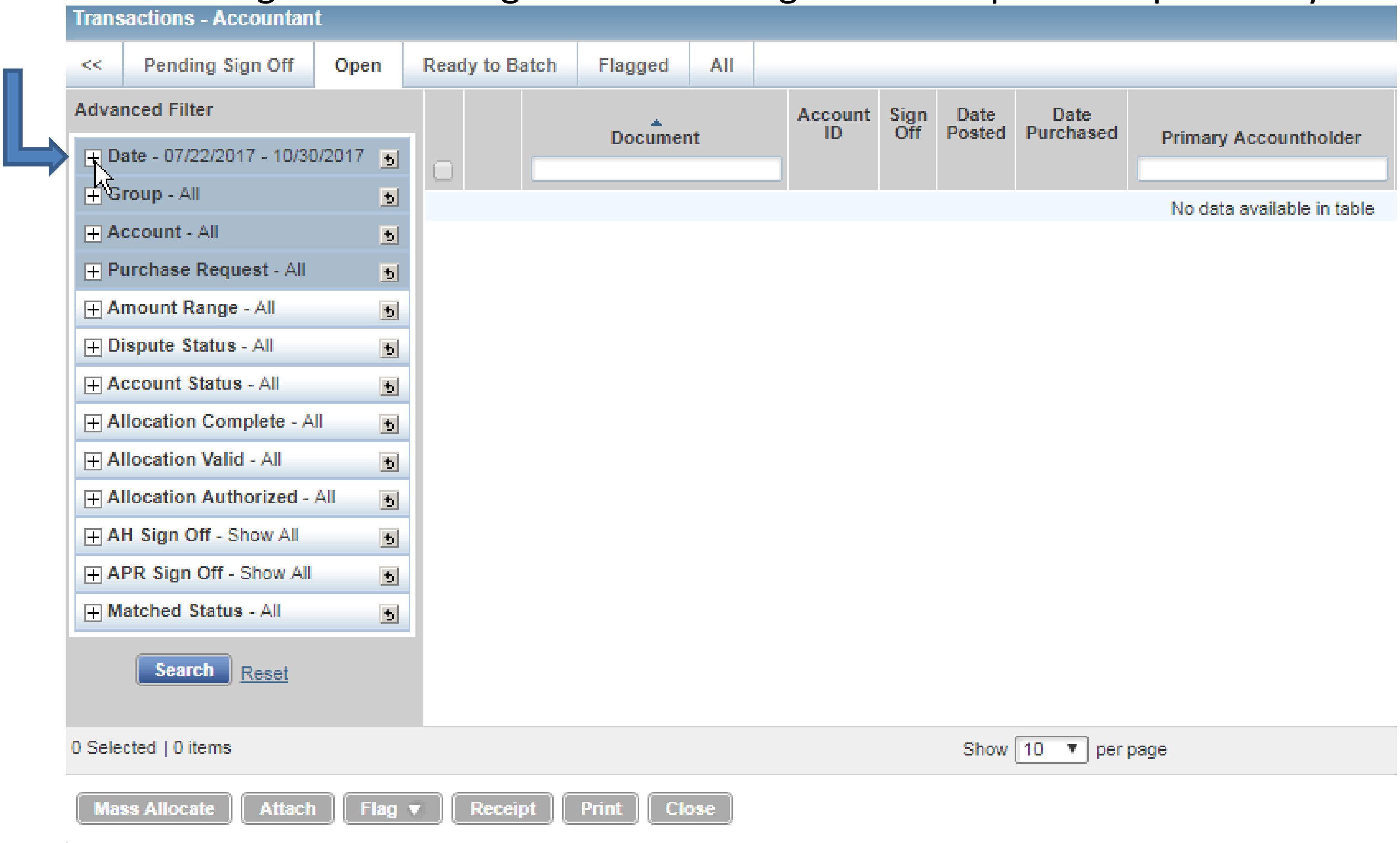
It will ask you to confirm closing the transaction. Click ok.



You will get a confirmation it was closed and it will disappear. This completes the signoff and review process. You can now return HOME, Continue reviewing additional transactions, or Log Out of the website on the upper right.



If you go to sign off on transactions and it says that you have, "no data available in table" that may mean you do not have any transactions to sign off within the given date range. The date range can be expanded up to two years.



To expand the date range you will need to click on the calendar symbol. A box will pop up in which you can enter whichever two dates you would like to see transactions between. Next you will click OK and finally you would choose Search.