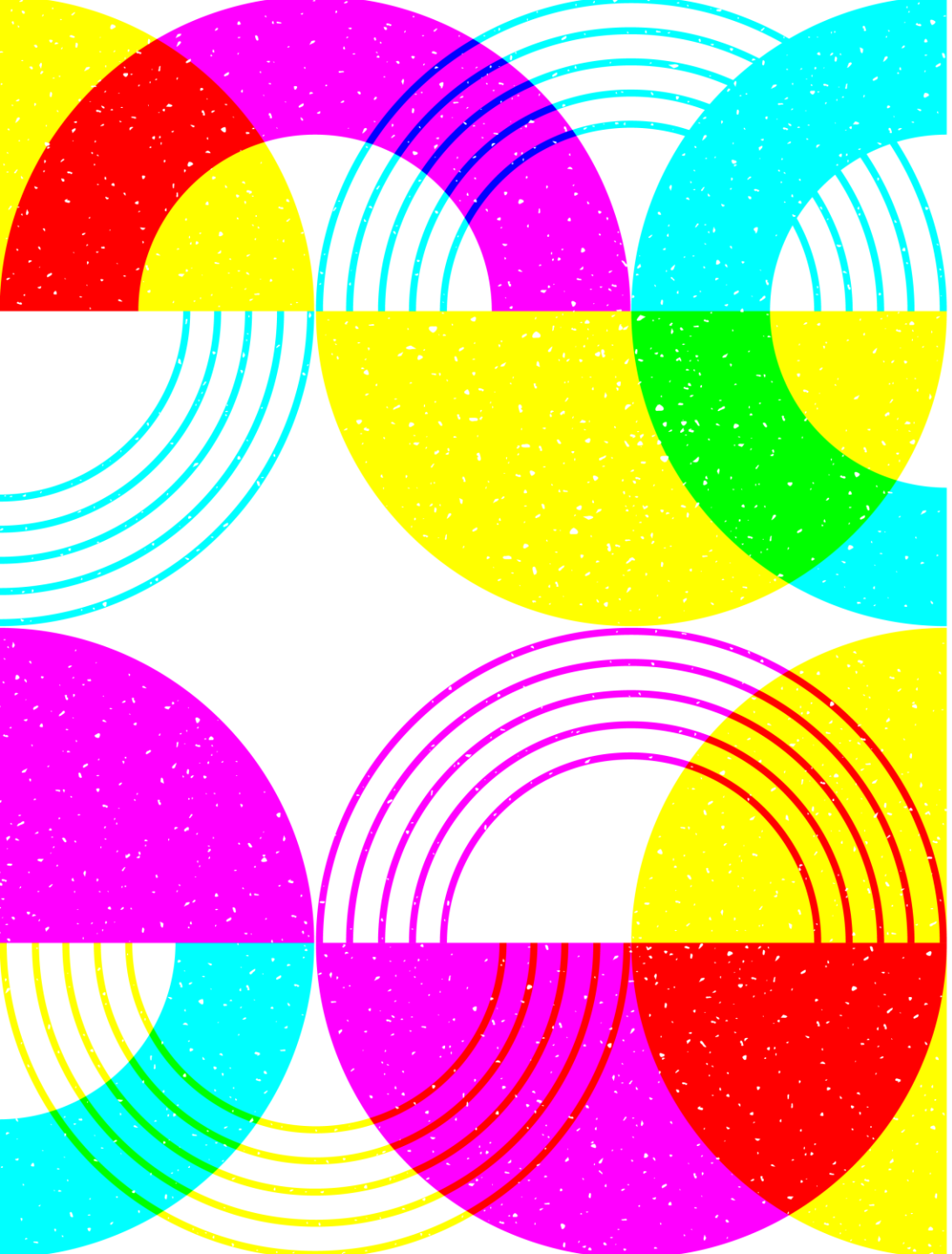


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Credit Cards: How to Simplify your Credit Card Process

Bailey Haumschild

Introductions



Bailey Haumschild

Solutions Engineer

Agenda

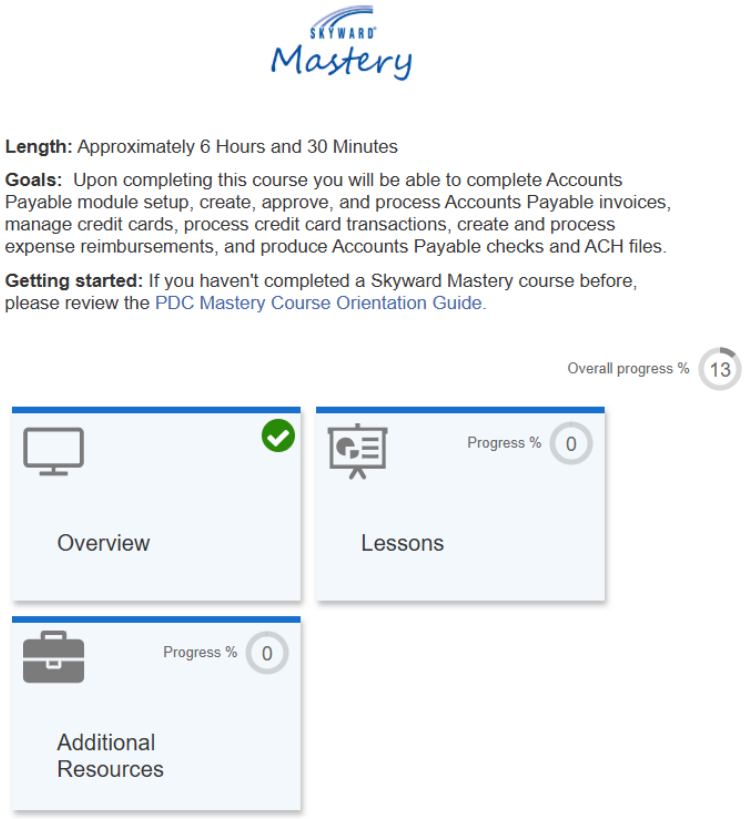
- Setup
- Import Credit Card Transactions
- Review, Submit, and Approve Transactions
- Build Invoices
- Report

Credit Card Recap

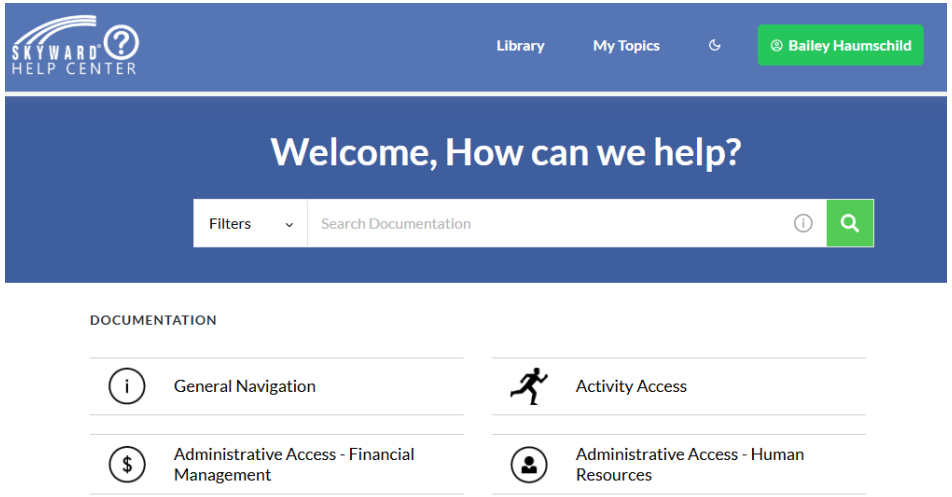
- **Credit Card Setup**
  - Set up workflows for reviewing, submitting, approving and ultimately generating invoices to pay the credit card company that fit your district.
- **Import Credit Card Transactions**
  - Remove manual entry by importing credit card transactions.
- **Review, Submit, Approve Transactions**
  - Verify the credit card transaction is correct, attach receipts, link the transaction to a PO, and submit the transactions for approval.
- **Build Invoices**
  - Save data entry time by generating invoices based on the details of credit card transactions

Training Resources

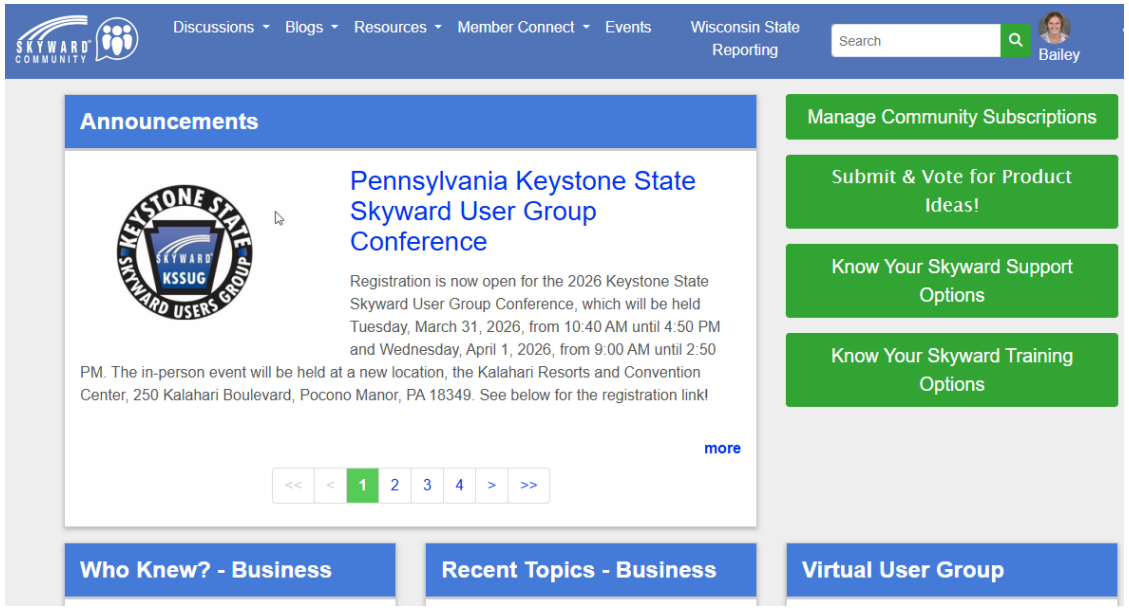
Professional Development Center (PDC)

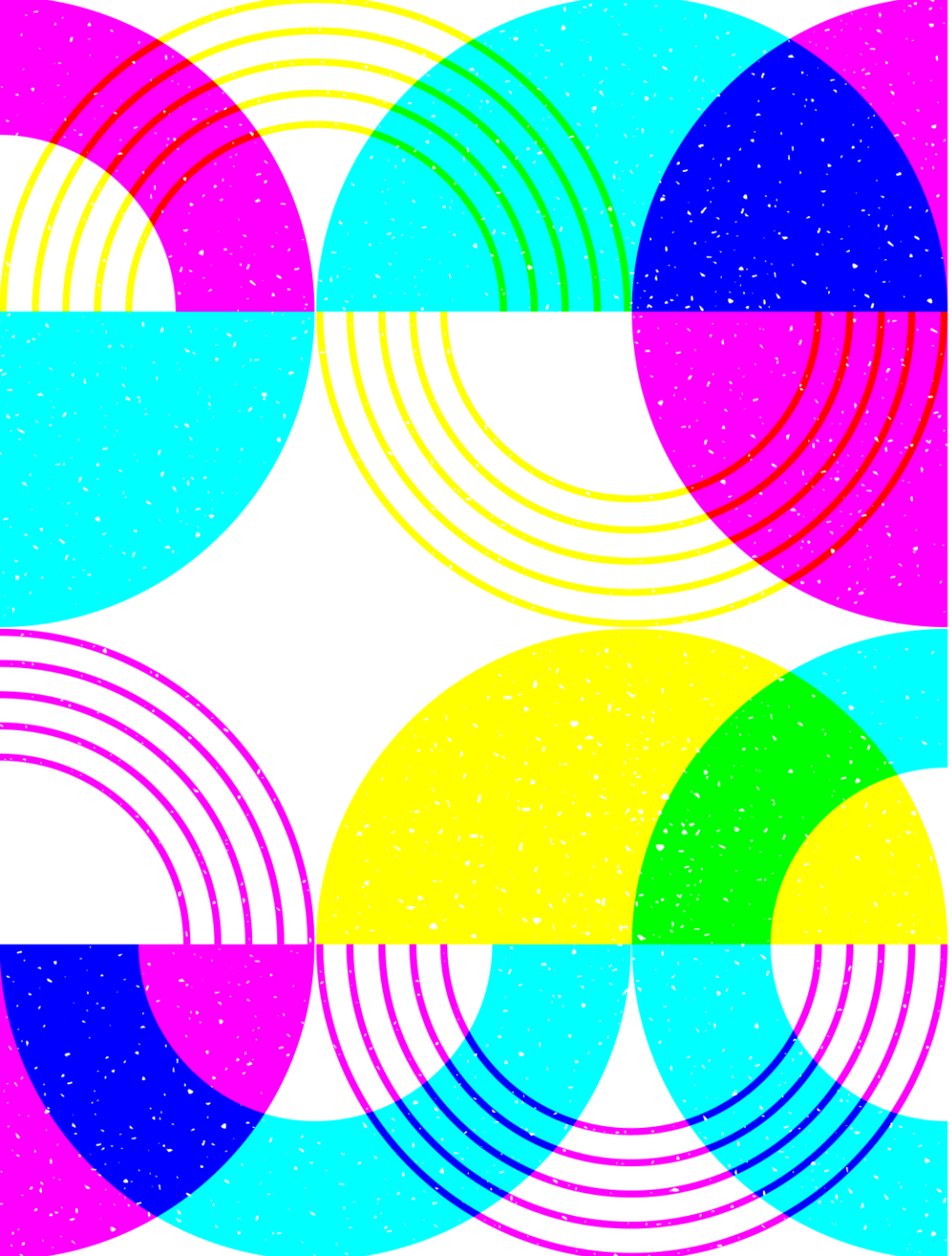


Help Center



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thank you!