CANISIUS COLLEGE
Purchasing Department

Purchasing Card Guide

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I. INTRODUCTION

The Canisius College Purchasing Visa Card program was established to streamline the Purchasing and Accounts Payable procedures for small dollar transactions up to $150.00 (approximately). The program is designed to provide for a more efficient purchasing environment while maintaining proper controls over the use of College funds. VISA cards replace the traditional purchasing process for designated items only.

Only those employees specified by the Card Program Administrator (CPA) will be authorized to participate in the program. All cards are issued through M&T Bank, NA at the request of the CPA. Card privileges may be rescinded at any time at the discretion of the CPA and appropriate management. Card usage will be audited. You are the only person authorized to use your card. You are personally liable for any unauthorized use, which occurs with your permission.

This booklet provides the guidelines under which you may utilize your Canisius College Purchasing Card. Please read it carefully. Your signature on the Cardholder Agreement or any use of your card indicates that you understand the intent of the program and agree to adhere to the guidelines. You will receive your Canisius College Purchasing Card soon. You can begin using it after you submit a signed Cardholder Agreement. If you have any questions regarding the card, please contact the CPA at x2815.

Responsible record keeping is essential for continued participation in the program. Please refer to the Purchasing Process and Statement Reconciliation sections of this guide for program guidelines on receipt retention.

Upon receipt of your Canisius College Purchasing Card, sign the back immediately and place it in a secure place. Although the card is issued in your name, it is the property of M&T Bank, N.A. and is only to be used for College purchases as allowed by the program. Remember that you are committing college funds each time you use the Canisius College Purchasing Card. This is a responsibility that should not be taken lightly!

The general guidelines contained herein apply to all credit cards issued on behalf of Canisius College, including gasoline company credit cards and other merchant specific credit cards. However, reconciliation procedures will differ.
II. PROGRAM RESTRICTIONS

Some Restrictions Have Been Built into the Program:

Each Purchasing Card has been assigned an individual monthly credit limit by their respective Director/Chair. If you find over time that the limit is too low to accommodate your monthly requirements, please contact your Director/Chair to reevaluate your limit. If your Director/Chair is in agreement that it would be appropriate to raise your limit, then he/she should complete a Purchasing Card Account Set up/Maintenance Form and forward it to the CPA who has authorization to approve the revised monthly limit.

In addition to the individual monthly credit limit, a transaction dollar limit may be established on every card based on your Director/Chair request.

Some merchants have been "blocked" from usage in the Purchasing Card Program. If you present your Purchasing Card to any of these merchants, the transaction will be declined. It is likely that any merchant you currently utilize as a source for products or services will accept your card. If you are declined and feel the decline should not have occurred, contact M&T Bank Customer Service at 1-800-443-8671 (indicated on the back of your Card) to determine the reason for the decline. If you do not receive an acceptable response, contact the CPA at x2815.

Examples of Acceptable Purchases.... (This list is not exhaustive)

Dues and Memberships
Office supplies
Instructional supplies (books, videotapes, etc.)
Laboratory supplies
Miscellaneous supplies, paper towels, napkins
Coffee and water service
Computer supplies and software
Subscriptions and periodicals
Get well flowers and cards
Seminar Fees
Travel expenses (Airline tickets, hotel reservations, car rental, transportation, and meals)

Examples of Unacceptable Purchases.... (This list is not exhaustive)
Items over $150.00 (Exception: Travel expenses may exceed the $150.00 limit)
Cash Advances
Capital Equipment (Furniture, file cabinets, chairs, copy machines, computers)
Hazardous materials and chemicals
Non-college related items or items for personal use.
III. ETHICS

It is our policy to maintain and practice the highest possible standards of business ethics, professional courtesy and competence in all purchases and business transactions. It is the responsibility of the cardholder to purchase only those items that are necessary for business purposes.

Canisius College’s suppliers, their products, personnel, and services are a natural extension of the college’s own resources. It is the responsibility of all employees to develop and maintain professional relationships between the college and its suppliers and to keep in mind that personal contacts form much of the basis for the supplier's opinion of the college. In this regard, the following should be observed when dealing with suppliers and their representatives:

1. Guarantee the confidentiality of all specifications and price quotations made by vendors.
2. Decline to take advantage of vendor's errors, and show consideration for supplier difficulties by cooperating with him/her whenever possible.

IV. HOW TO OBTAIN A PURCHASING CARD

PROCEDURES:

1. The applicant will complete the Purchasing Card Account Setup/Maintenance Form (See Appendix “A”). The Applicant’s social security number (SSN) and date of birth is required in order to activate the card or replace cards that are lost or stolen. The Applicant’s personal information and SSN will be kept confidential by M & T Bank and will only be used for the purposes stated in this procedure manual. The applicant is required to sign the application.

2. The applicant's Director/Chair reviews the application and selects a monthly credit limit. The individual transaction limit will automatically be $2,500.00 per month, unless a higher or lower limit is requested by the cost center Director/Chair.

3. The Applicant’s Director/Chair signs the application and forwards it to the CPA.

4. The CPA will process the application and the Applicant can expect delivery of the card within one week.

5. The applicant must personally pick up his/her newly issued VISA card at the Purchasing Department in HSC 203. Purchasing staff will review the Purchasing Card Guide with the cardholder at that time.

6. To activate the card, the Cardholder calls M&T’s QuickLine Customer Service at 1.800.443.8671.
V. PURCHASING PROCESS

PURCHASING PROCEDURES:

1. Cardholder places the order with the vendor, using the Purchasing Card for payment.

2. Cardholder records transactions on a Canisius College VISA Card Authorization Form (See Appendix “B”)

3. Vendor processes the order.

4. Vendor sends merchandise and receipt and charge slip to the Cardholder.

5. The Cardholder receives the goods and the receipt, then, verifies accuracy of the shipment.

6. Cardholder retains receipts and charge slips for use in reconciling the Transaction Report and for auditing purposes.

7. **NOTE:** If you want to purchase goods from a vendor who is not VISA capable, contact the CPA at x2815 so information regarding the program can be distributed to the vendor. Standard purchasing procedures must be followed until such time that the vendor becomes VISA capable.

8. **NOTE:** In order to ensure accurate and timely delivery of your order, make sure that the vendor places your name on the shipping label. For example:

   Dr. John Doe  
   Canisius College  
   2001 Main Street  
   Buffalo, NY 14208

If a name or department does not appear on the shipping label, our mailroom staff will open the carton and read the documents inside in order to properly route the item.
VI. STATEMENT RECONCILIATION

It is a requirement of this program that a receipt be obtained and filed by the Cardholder for every purchase identified on the Cardholder’s weekly web based Transaction Report and the Monthly Statement. If a receipt is lost or destroyed, it is the responsibility of the Cardholder to obtain a duplicate copy from the vendor.


2. Cardholder compares the weekly Transaction Report to his/her records and the vendor’s receipts. Disputed items must be handled in accordance with the "Disputes or Unauthorized Charges" section of this manual.

3. The Cardholder will edit the Transaction Review Report and indicate the appropriate Index and Account. See Appendix “D” PVSNET ProCard Guide.

4. Director/Chair signs either the Canisius College VISA Card Authorization Form or the Weekly Statement of Account, and files the form and receipts. If the Director/Chair believes a transaction is inappropriate, the Director/Chair is required to review the guidelines outlined in this procedures manual with the Cardholder and investigate and resolve any discrepancies or questions.

5. **NOTE:** Transactions must be reviewed and changes to Indexes and/or Accounts be made prior to 3 PM on Friday. After 3 PM transactions will post to your budgets. Subsequent changes to these transactions can be made in Banner using the Single Entry Correction/Transfer Form, or the Multiple Entry Correction/Transfer Form.
VII. CARDHOLDER PROFILE CHANGE PROCEDURES

1. Cardholder completes the Commercial Card Account Setup/Maintenance Form (See Appendix "A") to reflect the necessary profile changes.

2. Cardholder forwards the form to their Director/Chair for approval. If a credit limit adjustment is requested, the appropriate management signatures must be obtained.

3. The approved form is faxed to the CPA at x2863 for processing.
VIII. DISPUTED/UNAUTHORIZED CHARGES

TYPES OF DISCREPANCIES:

- A purchase appears on the Cardholder's weekly Transaction Report or Monthly Statement in error.
- The amount for the transaction is incorrect.
- A transaction appears twice on the report.
- There is a product quality or service issue.
- Sales tax is charged.

PROCEDURES:

1. If the Cardholder does not agree with a charge posted on the weekly Transaction Report or Monthly Statement, the cardholder should first try to resolve the disputed item with the vendor. If the cardholder is unable to resolve the dispute with the vendor, the Cardholder must notify M&T Bank in writing by completing the Commercial Card Dispute Form (See appendix “C”) within 30 days from the date of the statement on which the disputed charge occurred. M&T Bank will research the disputed charge and make any necessary adjustments to the account.

2. It is the Cardholder's responsibility to review the weekly Transaction Report to ensure the appropriate credit is received.

3. Sales Tax. It is the cardholder's responsibility to inform vendors regarding the tax-exempt status of the college. **Note that the college's tax-exempt number is printed on the face of your VISA card.** Tax exempt certificates may be obtained from the Purchasing or Controller's offices. If charged sales tax in error, it is the cardholder's responsibility to contact the vendor for a credit.
IX. CARD DEACTIVATION LOST OR STOLEN CARD

PROCEDURES:

1. The Cardholder must call M&T Bank Customer Service immediately at 1-800-443-8671 to notify M&T Bank, N.A. of a lost or stolen card. The Cardholder must record the date and the name of the Customer Service Representative he/she spoke to.

2. The Cardholder must complete a Purchasing Card Account Setup/Maintenance Form and fax it to the Purchasing CPA at x2863. NOTE: The Cardholder must indicate the date and the Customer Service Representative’s name on the form.

3. M&T Bank, N.A. will automatically produce a replacement card.

4. The Cardholder is responsible for the reviewing and reconciling Transaction Reports and Monthly Statement for both the lost and new card.

X. CARD DEACTIVATION CARDHOLDER COST CENTER CHANGE

PROCEDURES:

1. If a Cardholder changes cost centers (department) In the middle of a Transaction Report cycle, he/she must notify the CPA using a Purchasing Card Account Setup/Maintenance Form.

2. If charges need to be moved or split between cost centers, the Cardholder should make the necessary adjustments.
XI. CARD DEACTIVATION/CARD NO LONGER REQUIRED

PROCEDURES:

1. The Cardholder and/or Cardholder's Director/Chair determines that participation in the Purchasing Card Program is no longer necessary and completes the Purchasing Card Account Setup/Maintenance Form indicating Close Account in the appropriate space on the form. Fax the completed form to the CPA at x2863.

2. The CPA reviews and processes the form.

4. The Cardholder is responsible for submitting the statement with attached receipts for any activity since the last billing statement. The statement and receipts should be submitted to the Purchasing Department at HSC 203, Attn: CPA.

XII. CARD DEACTIVATION/EMPLOYEE SEPARATION

PROCEDURES:

1. The Cardholder has provided notice of resignation or has been terminated, the Cardholder's Director/Chair completes Purchasing Card Account Setup/Maintenance Form indicating Close Account in the appropriate space on the form. Call the CPA as soon as possible and send form.

2. The Cardholder's Director/Chair obtains the card from the Cardholder.

3. The CPA reviews and processes the form.

5. The cardholder's Director/Chair is responsible for submitting the statement with attached receipts for any activity since the last billing statement. The statement and receipts should be submitted to the Purchasing Department at HSC 203, Attn: CPA.

6. The Director/Chair may request a new card for replacement employee.
XIII. CARD DEACTIVATION/NON-COMPLIANCE ABUSE

NOTE: ABUSE OF THE PURCHASING CARD WILL LEAD TO DISCIPLINARY ACTION UP TO AND INCLUDING TERMINATION.

PROCEDURES:

1. It is the responsibility of all employees to bring Purchasing Card abuse to the attention of the Cardholder's Director/Chair or the CPA.

2. The Cardholder's Director/Chair completes Purchasing Card Account Setup/Maintenance Form indicating Close Account in the appropriate space on the form. Call the CPA immediately and send the form.

3. The Cardholder's Director/Chair obtains the card from the Cardholder.

4. The CPA reviews and processes the form.

5. The Cardholder's Director/Chair is responsible for submitting the statement with attached receipts for any activity since the last billing statement. The statement and receipts should be submitted to the Purchasing Department at HSC 203, Attn: CPA.

6. The Director/Chair may request a new card for another designate (See "How To Obtain a Purchasing Card" section of this manual.)
## XIV. Helpful Telephone Numbers

<table>
<thead>
<tr>
<th>Description</th>
<th>Examples</th>
<th>Contact</th>
<th>Telephone</th>
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<tbody>
<tr>
<td>Internal Issues</td>
<td>New cards $ Limit changes</td>
<td>Canisius College Card Program Administrator</td>
<td>888-2815 User Account Maintenance Form</td>
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<tr>
<td>Web Review and Approval</td>
<td>Transaction Review Report</td>
<td>Canisius College PVSNET.ProCard Coordinator</td>
<td>Controller’s Office 888-2840</td>
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<tr>
<td>Cardholder Services</td>
<td>Card Activation Lost/Stolen Account Info</td>
<td>M&amp;T QuickLine (24 hours)</td>
<td>800-443-8671 716-635-4152 collect</td>
</tr>
<tr>
<td>Visa Benefits and Services</td>
<td>Car Rental Emergency Cash Lost/Stolen</td>
<td>Visa Assistance Center (24 hours)</td>
<td>800-VISA-911 410-581-9994 collect</td>
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<tr>
<td>Disputed Items</td>
<td>Duplicate Transaction Erroneous amount</td>
<td>Canisius College Card Program Administrator</td>
<td>Fax Commercial Card Dispute Form to 716-848-3414</td>
</tr>
</tbody>
</table>

**APPENDIX A**  
M & T Commercial Card Account Setup Maintenance Form

**APPENDIX B**  
Canisius College VISA Purchasing Card Log Form

**APPENDIX C**  
M & T Commercial Card Dispute Form

**APPENDIX D**  
PVS NET ProCard Guide
COMMERCIAL CARD ACCOUNT SETUP & MAINTENANCE FORM

☐ Purchasing Card (Prin 2000)  ☐ Corporate Card (Prin 1000)

☐ New Account  ☐ Close Account  ☐ Replacement Card

☐ Name/Address Change  ☐ Company Defined/Miscellaneous Info  ☐ Rush - $20.00 Fee

☐ Spending Limit Change  ☐ Other  ☐ Lost/Stolen

☐ Merchant Category Change  ☐ Fraud Detected  ☐ Other

Cardholder Name to Appear on Card (Max 26 Chars - names over 18 chars may extend into Visa logo)

Card Account Number

Social Security # (for ID purposes only)  Date of Birth (for ID purposes only)

Company Name, Division or Other Info to Appear on Card (max 19 chars)

Optional: Company Defined Fields (max 22 chars; alpha-numeric)

STATEMENT MAILING ADDRESS

CANISIUS COLLEGE

Company Name (max 26 chars)

2001 MAIN STREET

Street (max 26 chars)

BUFFALO

City (max 18 chars)

NY 14208

State  Zip

Business Telephone

4715 5620 0800 0207

Billing Control Account #

M&T Use Only → CB

Merchant Strategy

SPENDING LIMITS

Monthly Spending Limit  Optional Spending Limit (Describe _________)  Merchant Category Change

Allow Cash Access  ☐ NO (default is NO)

☐ YES (must generate PIN)

(max $600 daily / $300 per txn)  Monthly Cash Limit  ☐ Same as Monthly Spending Limit

COMPANY INTERNAL AUTHORIZATION

Employee Signature  Date  Manager Authorization  Date

Required: Card Program Administrator Authorization  Date

M&T INTERNAL USE ONLY

Regional Authorization  Date  Date Entered  Initials  Date Verified  Initials

5618 2000 0080 2220 080

System  Prin  Agent  Company ID

If card is lost or stolen, please notify M&T Bank immediately at 1-800-443-8671

Appendix A
CANISIUS COLLEGE VISA CARD AUTHORIZATION FORM - REV. FALL 2002

Note. 1. Be sure to fill in Index and Account

2. Verify the GRAND TOTAL matches the TOTAL PURCHASES on your statement.

3. Please print your name and sign the bottom of the form.

4. Director/Chair must sign this monthly form, maintain receipts and forms in permanent file.

<table>
<thead>
<tr>
<th>ITEM</th>
<th>PURCHASE DATE</th>
<th>VENDOR NAME &amp; INFO.</th>
<th>DESCRIPTION / REASON FOR PURCHASE</th>
<th>$ AMOUNT</th>
<th>INDEX</th>
<th>ACCOUNT #</th>
<th>INDEX-ACCOUNT TOTAL AMOUNT *</th>
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* Use this column after sorting by Index & Account to sum identical Index-Account strings.

**SUB-TOTAL**

$ -

**GRAND TOTAL**

$ -

< This is the total for this page only.

< This must match VISA MONTHLY STATEMENT TOTAL.

Cardholder Printed Name ___________________________ Cardholder Signature ___________________________ Date ___________ Supervisor’s Signature ___________________________

Questions re: VISA card, please contact Janine Hughes x 2815. PVSNET.ProCard questions please contact Claudia Hojnacki x2840.

Appendix B
# COMMERCIAL CARD DISPUTE FORM

Fax the completed form to your Commercial Card Program Administrator at ( ) ______-______ phone ( ) ______-______

## CARDHOLDER INFORMATION

Card Account Number

Name on Card

Company

Address

Work Phone

## Type of Dispute (Please check appropriate box)

- [ ] Purchasing Card
- [ ] Corporate Card

- [ ] Credit Not Posted (Attach Credit Slip)
- [ ] Duplicate Posting
- [ ] Erroneous Amount (Attach Sales Slip)
- [ ] Reservation Guarantee (Provide Cancellation Number ________________)
- [ ] Unauthorized Transaction
- [ ] Other ________________

## DATE OF SALE | AMOUNT | MERCHANT NAME

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
<th>Merchant Name</th>
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Describe Dispute:

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

I have tried to resolve this dispute with the merchant to the best of my ability.

Cardholder Signature __________________________ Date ________

Card Program Administrator Review __________________________ Date ________

Send Dispute To:

M&T Bank, N.A.
Attn: Commercial Card Disputes
P.O. Box 4028
Buffalo, NY 14240-4028

or

Fax to: (716) 848-3414

Please Note: Your request to dispute a Visa transaction must be received by M&T Bank, N.A. no later than 60 days after you have received the first bill on which the error or problem appeared.

If card is lost or stolen, please notify M&T Bank immediately at 1-800-443-8671
CANISIUS COLLEGE
Controller’s Office

ProCard.Com Guide
Appendix D

New 10/02

User ID
Password
# Canisius College
# Procard.com Guide

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Welcome to PVS Net. We hope you will find this product a useful tool to assist you in managing your Canisius College Purchasing Card. This product allows you to view transaction information, edit accounting allocation information, and run reports. We have included “Print Screen” shots for your visual reference. We are sure they will be helpful as you process your ProCard transactions through the M & T PVS Net ProCard website.

This document will:

- Highlight some of the basic functions of PVS Net
- Provide first steps to take when initially logging on to PVS Net
- Explain how to view transactions, edit allocation information, and run reports.

Overview

All PVS net pages are similar in functionality and appearance. The top left corner contains the PVS Net logo to link the ProCard Web site.

NOTE: If you are logged on to PVS net and no actions are performed for 20 minutes, you will be automatically logged off and you will be required to log on again. Any unsaved changes must be re-entered.
B

Setting Up PVS Net

Click on Microsoft Internet Explorer ICON and log in www.procard.com
Hit enter

The ProCard PVS NET LOGIN Screen will be displayed
Click on PVS Net Login

ProCard: Benefits You Can Bank On

Transform information into insight through ProCard’s innovative, Web-based technology solutions that help you manage critical aspects of your business—from commercial card programs to financial and business reporting—at any time, from anywhere, efficiently and securely.

Basic Purchase Solution
PVS Net is an intuitive solution that allows you to manage your purchase card program and streamline processes.
The ProCard PVS NET LOGON Screen will be displayed
Click Click here to log on to PVS Net

Products > PVS Net Access

PVS Net Access

PVS Net logon

Click here to log on to PVS Net

Online demonstration

ProCard is pleased to provide you with an online demonstration of PVS Net. By clicking on the PVS Net Demo descriptor below, you will be asked to complete a brief Guest Registration form. Shortly after submitting that information, a temporary logon ID will be e-mailed to you.

Click here for PVS Net Demo

Once you receive your logon ID, you can access the system by clicking on the PVS Net Logon link above.

Contact ProCard's Business Development staff if we can be of further assistance.

ProCard, Inc.
1819 Denver West Drive, Bldg. 26, Suite 265
Golden, CO 80401-3118
Main Phone: 303-279-2255
Main Fax 303-279-2874
Toll Free: 1-800-776-8485
A screen appears which says “You are about to view pages over a secure connection” Click “OK”

License agreement may appear, scroll to the end. Click “OK”

**Logging onto PVS.NET**

**The Actual PVS Net Logon Screen will be displayed**
Type your User ID from the personal User ID sheet provided
Type initial Password from same sheet
Click Logon
M & T Bank, N.A Welcome to PVS net Plus screen will appear.

Welcome to PVS Net Plus - Your M&T Bank Commercial Card Internet Reporting Solution

For questions on how to use this system, please contact your organization's PVS Net Administrator by selecting the "support" tab on the menu bar to the left.

For lost/stolen cards, please contact M&T Bank at 800-443-8671.

If paying by check, please remit payment to:

M&T Bank, N.A.
P.O. Box 1301
Buffalo, NY 14240-1301

Please include your company name and account number on your check. Thank you.

Note: Please wait at least two business days following the end of the monthly cycle when determining the payment amount due.

Welcome to PVS Net Plus
In the Tool Bar under “USER” choose Settings
Enter your “New” password
Click on confirm your “New” password, and reenter password.

Note: Password must contain one digit.
Click SAVE

NOTE: Instructions for changing your password are included should you choose to change your password again.

Settings

Update this information and click save when finished:

<table>
<thead>
<tr>
<th>User Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logon: glew323</td>
</tr>
<tr>
<td>First Name:</td>
</tr>
<tr>
<td>GARY B</td>
</tr>
<tr>
<td>Last Name:</td>
</tr>
<tr>
<td>LEW</td>
</tr>
<tr>
<td>Dept:</td>
</tr>
<tr>
<td>Email:</td>
</tr>
<tr>
<td>Password:</td>
</tr>
<tr>
<td>XXXX</td>
</tr>
<tr>
<td>Confirm Password:</td>
</tr>
<tr>
<td>XXXX</td>
</tr>
</tbody>
</table>

(Use your browser's BACK button to cancel this operation)
Changing your password

You can change your logon password any time. Depending upon your organization's security policies, your PVS Net administrator might require you to change your password periodically.

Change your password through the Settings page.

To change your password:
1 In the User area of the menu bar, click Settings.
2 In the Password field of the Settings page, type your new password. The password must be at least six characters in length, and must contain at least one numeric character. Passwords are not case sensitive.

Note: To protect the privacy of the password, an asterisk (*) displays for each character entered.

3 In the Confirm Password field, re-enter your new password exactly as you entered it in the Password field.
4 Click Save. Your password is immediately changed to the new value, and a confirmation page displays.

Note: The Save button is positioned at the bottom of the page. You might have to scroll to locate it.
Preferences

<table>
<thead>
<tr>
<th>Records Per Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ 10</td>
</tr>
<tr>
<td>☐ 25</td>
</tr>
<tr>
<td>☑ 50</td>
</tr>
<tr>
<td>☑ 100</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Card Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔ Card</td>
</tr>
<tr>
<td>✔ Cardholder Name</td>
</tr>
<tr>
<td>☐ Bank Allocation Code</td>
</tr>
<tr>
<td>☐ Account Type</td>
</tr>
<tr>
<td>☐ Account Status</td>
</tr>
<tr>
<td>✔ Default Card Allocation</td>
</tr>
<tr>
<td>☐ City</td>
</tr>
<tr>
<td>☐ State/Province</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Transaction Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔ Split Indicator</td>
</tr>
<tr>
<td>✔ Transaction Detail Indicator</td>
</tr>
<tr>
<td>✔ Transaction Date</td>
</tr>
<tr>
<td>✔ Post Date</td>
</tr>
<tr>
<td>✔ Vendor Name</td>
</tr>
<tr>
<td>✔ Vendor City</td>
</tr>
<tr>
<td>✔ Vendor State</td>
</tr>
<tr>
<td>☐ Original Currency Amount</td>
</tr>
<tr>
<td>☐ Original Currency Code</td>
</tr>
<tr>
<td>✔ Settlement Amount</td>
</tr>
<tr>
<td>✔ Tax</td>
</tr>
<tr>
<td>☐ Card ID</td>
</tr>
<tr>
<td>✔ Cardholder Name</td>
</tr>
<tr>
<td>☐ Bank Alloc Code</td>
</tr>
<tr>
<td>✔ Transaction Allocation</td>
</tr>
<tr>
<td>Checkbox</td>
</tr>
<tr>
<td>----------</td>
</tr>
<tr>
<td>☑ Expense Type Allocation Code</td>
</tr>
<tr>
<td>☐ Project Alloc Code</td>
</tr>
<tr>
<td>☐ Merchant Category Code</td>
</tr>
<tr>
<td>☐ Transaction ID</td>
</tr>
<tr>
<td>☐ Ticket Number</td>
</tr>
<tr>
<td>☐ Passenger Name</td>
</tr>
<tr>
<td>☐ Departure Date</td>
</tr>
<tr>
<td>☑ Point of Sale Code (POS)</td>
</tr>
<tr>
<td>☑ Status</td>
</tr>
<tr>
<td>☑ Description on Transaction Report</td>
</tr>
<tr>
<td>☑ Description, when blank, on Statement of Account Report</td>
</tr>
</tbody>
</table>

Save
C

Viewing and Editing Transactions

Viewing Transactions Online

To view transactions online click on the transaction tab under the User section. The Transaction Review page will be displayed.

Transaction Review

1. Run a Transaction [Detail] report (Summary reports currently unavailable in offline format)

2. Sort Transactions by Card Number [Ascending] without totals

3. Subsort by Post Date [Ascending] without subtotals

4. For transactions posted between 09/13/2002 and 09/19/2002

5. Formatting the report as a Table

6. Number of records to display per page (Table output only) [25]

7. Use the following cards in the report:

   You have 1 card(s) currently selected.

   [Change Selected Cards]


9. [Store query in Report Log (online reports only). Enter Name: 09/19/02 Transactions]

<p>| (Optional) Apply the following conditions: |</p>
<table>
<thead>
<tr>
<th>Data Field</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(none)</td>
<td>(none)</td>
<td></td>
</tr>
<tr>
<td>(none)</td>
<td>(none)</td>
<td></td>
</tr>
<tr>
<td>(none)</td>
<td>(none)</td>
<td></td>
</tr>
<tr>
<td>(none)</td>
<td>(none)</td>
<td></td>
</tr>
</tbody>
</table>

[Run Report]
Viewing Transactions Online

NOTE: Transactions are included based on transaction posting dates. Canisius College will use Friday to Thursday dates.

To view transactions online, complete the following steps:
1. Select the pull down “Detail” to run a Transaction report.
2. Select Sort Transactions by “Card Number”, “Ascending” and “without” totals.
3. Select sub sort Criteria “by Post Date”, “Ascending”, and “without” totals.
4. Enter the date range based on Friday to Thursday posting date of transactions.
5. Select “Table” format for on-screen viewing and editing of transactions.
6. Select “25” for the number of transactions to display on the table.

NOTE: If “ALL “is selected, the report will be created as an offline report and will not display online.
7. SKIP
8. Click “Online” in the report Destination field.
9. “Check” the box for “Store query in Report Log” (online reports only). In the “Enter Name” field select the date (THURSDAY) date for each weeks Transactions. SAMPLE “09/19/2002 Transactions”.

NOTE: Every week you will select a THURSDAY date and the word “Transactions”

09/19/2002 Transactions
09/26/2002 Transactions
10/03/2002 Transactions

Click on the Run Report button to create the query.
The Transaction Review screen will be displayed:
Transaction Review

For Transactions posted between 9/1/2002 and 9/30/2002

<table>
<thead>
<tr>
<th>#</th>
<th>Split</th>
<th>-</th>
<th>Date</th>
<th>Post Date</th>
<th>Vendor Name</th>
<th>CIP</th>
<th>City</th>
<th>State</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>P</td>
<td>08/30/2002</td>
<td>09/02/2002</td>
<td>IP BULL FEATHERS RESTAUR</td>
<td>BUFFALO</td>
<td>NY</td>
<td>41.14</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>P</td>
<td>08/30/2002</td>
<td>09/02/2002</td>
<td>BISON ENGRAVING &amp; SIGN</td>
<td>7166366179</td>
<td>NY</td>
<td>6.50</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>P</td>
<td>08/30/2002</td>
<td>09/02/2002</td>
<td>BISON ENGRAVING &amp; SIGN</td>
<td>7166366179</td>
<td>NY</td>
<td>11.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>P</td>
<td>09/04/2002</td>
<td>09/06/2002</td>
<td>CINIGULAR U. STATE NY-ONY</td>
<td>8003310030</td>
<td>OA</td>
<td>14.19</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Net</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>72.23</td>
</tr>
</tbody>
</table>

*Indicates transaction has been posted. No further allocation is allowed.

Editing Allocation Information

There are four fields where users can edit allocation information:

**Note:** If transactions have been posted, as indicated by a asterisk (*) on the report, see Column 1, no further changes are allowed.

1. **Transaction Allocation** – This field will display the Canisius College Index or the default Card Allocation Index set up within PVS Net. Cardholders should enter the appropriate Index for each transaction.

2. **Expense Type Allocation** - This field will display the industry standard default allocations or Canisius College Accounts. Cardholders may edit as necessary using Canisius College guidelines.

**NOTE:** Example: Eaton Office use Office Supplies Account or 801151

3. **Status** – From the pull down select “Accepted”.

4. **Description** – Add a brief description.

Click on SAVE once allocation information has been entered, at the bottom of the screen.
Note: If transactions have been posted, as indicated by a asterisk (*) on the report, see Column 1, no further changes are allowed.

<table>
<thead>
<tr>
<th>#</th>
<th>Split</th>
<th>Detail Info</th>
<th>Transaction Date</th>
<th>Post Date</th>
<th>Vendor Name</th>
<th>Vendor City</th>
<th>Vendor State</th>
<th>Settlement Amount</th>
<th>Tax</th>
<th>Transaction Allocation</th>
<th>Expansive Type</th>
<th>Allocation</th>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>P</td>
<td>TK TECHNOLOGIES INC</td>
<td>08/19/2012</td>
<td>08/20/2012</td>
<td>KENMORE</td>
<td>NY</td>
<td>183.00</td>
<td>NY</td>
<td>0.00</td>
<td>0.00</td>
<td>801116</td>
<td>Not Reviewed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>P</td>
<td>KATON OFFICE SUPPLY</td>
<td>08/22/2012</td>
<td>08/23/2012</td>
<td>71-66916100</td>
<td>NY</td>
<td>101.67</td>
<td>NY</td>
<td>0.00</td>
<td>0.00</td>
<td>801115</td>
<td>Not Reviewed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>P</td>
<td>OFFICE MAX 00002202</td>
<td>08/25/2012</td>
<td>08/26/2012</td>
<td>CHEEKTOWAGA</td>
<td>NY</td>
<td>12.99</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>801115</td>
<td>Not Reviewed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>P</td>
<td>KATON OFFICE SUPPLY</td>
<td>08/29/2012</td>
<td>08/30/2012</td>
<td>71-66916100</td>
<td>NY</td>
<td>22.03</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>801115</td>
<td>Not Reviewed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>P</td>
<td>KATON OFFICE SUPPLY</td>
<td>09/02/2012</td>
<td>09/03/2012</td>
<td>71-66916100</td>
<td>NY</td>
<td>63.78</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>801115</td>
<td>Not Reviewed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td>Split</td>
<td>KATON OFFICE SUPPLY</td>
<td>09/12/2012</td>
<td>09/13/2012</td>
<td>71-66916100</td>
<td>NY</td>
<td>3.19</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>801115</td>
<td>Accepted</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td>Split</td>
<td>KATON OFFICE SUPPLY</td>
<td>09/12/2012</td>
<td>09/13/2012</td>
<td>71-66916100</td>
<td>NY</td>
<td>141.79</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>801115</td>
<td>Accepted</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Net Transaction Total: 530.44

*Indicates transaction has been posted. No further allocation is allowed.
Splitting Transactions

When editing allocation information, users can split one transaction between multiple Indexes.

1. To split transactions, click on the Split hyperlink in the Splits column indicating how many times the transaction may be split. Clicking on the number hyperlink will take the user to the Transaction Split screen.

2. When the Split hyperlink is selected the Transaction Split Edit screen will be displayed.

3. The user then indicates how many times they want to split the transaction between 2 and 20 times. Then select to split all records equally or have all records show as zero and click on ADD.

4. Change the Amount for each transaction to be split and indicate the appropriate Index and Account, and description.

5. Once the information is entered, click on SAVE

NOTE: If odd amounts are used for transactions, the user MUST choose which will be one cent more or one cent less.

Transaction Split

Cardholder Name: JOSEPHINE A FEARY
Tran ID: 0094767596
Post Date: 09/15/2002
Merchant: EATON OFFICE SUPPLY
Amount: $3.19
Current Split Items: 1

1. Desired final number of split items: 2

2. Select split option: Split All Records Equally

Select the Final # of splits that will result and the Options for Add.

Click the Add button to perform the split. You will then be able to enter allocation values for each split item.

Add
### Splits

<table>
<thead>
<tr>
<th>D</th>
<th>#</th>
<th>Amount</th>
<th>Percent</th>
<th>Description</th>
<th>Transaction Allocation</th>
<th>Expense Type Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>1.60</td>
<td>50.16</td>
<td>Joann's Toys</td>
<td>CONTRL</td>
<td>801151</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>1.60</td>
<td>50.16</td>
<td>Joann's Toys</td>
<td>CONTRL</td>
<td>801151</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0.01</td>
<td>-0.32</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tot.</td>
<td>3.20</td>
<td>100.32</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** If odd amounts are used for transactions, the user MUST choose which will be one cent more or one cent less.
**Cardholder Name:** JOSEPHINE A FEARY  
**Tran ID:** 0094767596  
**Post Date:** 09/15/2002  
**Merchant:** EATON OFFICE SUPPLY  
**Amount:** $3.19  
**Current Split Items:** 2

### Splits

<table>
<thead>
<tr>
<th>D</th>
<th>#</th>
<th>Amount</th>
<th>Percent</th>
<th>Description</th>
<th>Transaction Allocation</th>
<th>Expense Type Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>1.59</td>
<td>49.84</td>
<td>Joann's Toys</td>
<td>PURCH</td>
<td>801151</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>1.60</td>
<td>50.16</td>
<td>Joann's Toys</td>
<td>CONTRL</td>
<td>801151</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tot.</td>
<td>3.19</td>
<td>100.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** If odd amounts are used for transactions, the user MUST choose which will be one cent more or one cent less.
Transaction Split Edit

NOTE: The following is provided for information only:

On the previous Print Screen the following action buttons are present:

1. **Save** Saves the users changes and the splits that were created.

2. **Revert** Will change the allocation information back to the last saved value.

3. **Remove All Splits** Will remove all splits that have been created.

4. **Delete Splits** Will delete those splits that have a check in the “D” column.

5. **New Splits** Will create a new split in addition to the ones already there.

6. **Cancel** Will cancel the request and not save any of the splits unless they were previously saved.

NOTE: If the transaction has been flagged as posted, no further editing of allocation information is allowed. As a result, the only buttons that will be displayed at the bottom of the screen will be Save, Revert, and Cancel. In addition, the following message will be displayed at the top of the Splits table:

*Transaction has been posted. No further allocation is allowed.*
NOTE: If the transaction has been flagged as posted, no further editing of allocation information is allowed. As a result, the only buttons that will be displayed at the bottom of the screen will be Save, Revert, and Cancel. In addition, the following message will be displayed at the top of the Splits table:

*Transaction has been posted. No further allocation is allowed.*
Requesting Standard Reports

Standard Reports

PVS Net provides the ability to run standard reports as a **Statement of Account** report.

Click on the **reports** tab under the **User** section. The Standard Reports page will be displayed. Users can then set the report options.

1. From the Select One pull down choose: “Statement of Account Report”.
2. For transactions posted between _______ Enter date
   **Example** 09/13/2002 and 09/19/2002
3. Skip the “Change Selected Cards”
4. Put a dot • indicating that PVS Net can store the report for later access through the Report Log.
5. Leave blank the “Enter a Name to uniquely identify this report” field.

Click on **Run Report**

**Standard Reports**

1. Select One: **Statement of Account Report**

2. For transactions posted between 09/13/2002 and 09/19/2002

3. You have 1 card(s) currently selected.

4. PVS Net can either ☐ store the report for later access through the Report Log or ☐ Send report via email upon completion.

5. Enter a Name to uniquely identify this report:

   **Run Report**

**Standard Reports and Custom Mappers are available only as offline reports.**

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Report Log and Printing of Statement

Report Log Review
1. Users, who save online transactions queries, can view those reports and/or queries in the Report Log.

![Report Log Table]

Please enter your search criteria now.

To view all reports and mappers, leave all fields in their defaulted state and click on Search.

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2. Click on the **report log** tab under the **User** section. The log displays each report and provides a hyperlink to **download** the report or resubmit the request. In addition, users can clear reports that are not longer needed.

3. Click on download for the report
4. The Report Log page appears:
   Report states “You are using Mozilla/4.0.........”
   Click on “Your report can be downloaded from here”

5. A WORD document will just appear on your computer, or a WORD document will appear at the bottom of your computer. This is the Weekly “Statement of Account”.

Report Log

You are using Mozilla/4.0 (compatible; MSIE 5.01; Windows 98).

With older versions of some browsers have trouble with the following link. You can either click on the link, or right mouse over the link and select save as...

Your report can be downloaded from here.

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6. Click on the “Print” button or go to File and Click Print.

**NOTE:** The Weekly “Statement of Account” must be signed by the cardholder and his/her supervisor and/or department chair.

Receipts must be attached to the Weekly “Statement of Accounts” and maintained in permanent files.

**NOTE:** Cardholders have two options:

A. Either maintain a signed Weekly “Statements of Account” OR

B. Complete a Canisius College Visa Card Authorization Form. Cardholder must sign, attached receipts, and have his/her supervisor and/or department chair sign the form, and maintain it in a permanent file.
# Statement of Account

For Transactions posted between 09/13/2002 to 09/19/2002

<table>
<thead>
<tr>
<th>Tran Date/Post Date</th>
<th>Vendor</th>
<th>City, State/Reference Number</th>
<th>Orig Cur</th>
<th>Tax</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/12/2002 9/15/2002</td>
<td>EATON OFFICE SUPPLY</td>
<td>7166916100, NY</td>
<td>3.19</td>
<td>0.00</td>
<td>3.19</td>
</tr>
<tr>
<td></td>
<td></td>
<td>24661002256138015800167</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Joann's Toys</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9/12/2002 9/15/2002</td>
<td>EATON OFFICE SUPPLY</td>
<td>7166916100, NY</td>
<td>161.79</td>
<td>0.00</td>
<td>161.79</td>
</tr>
<tr>
<td></td>
<td></td>
<td>24661002256138015800126</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Joann's Toys</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total All Transactions: 2 Amount: 164.98
Statement of Account

For Transactions posted between 09/13/2002 to 09/19/2002

Grand Total: ________________________________

Total Transactions: _________________________

2

Amount: __________________________

164.98
Note 1. Be sure to fill in Index and Account

2. Verify the GRAND TOTAL matches the TOTAL PURCHASES on your statement.

3. Please print your name and sign the bottom of the form.

4. Director/Chair must sign this monthly form, maintain receipts and forms in permanent file.

<table>
<thead>
<tr>
<th>ITEM</th>
<th>PURCHASE DATE</th>
<th>VENDOR NAME &amp; INFO.</th>
<th>DESCRIPTION / REASON FOR PURCHASE</th>
<th>$ AMOUNT</th>
<th>INDEX</th>
<th>ACCOUNT #</th>
<th>INDEX-ACCOUNT TOTAL AMOUNT *</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td>$</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td>$</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
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</tbody>
</table>

* Use this column after sorting by Index & Account to sum identical Index-Account strings.

SUB-TOTAL $ - < This is the total for this page only.

GRAND TOTAL $ - < This must match VISA MONTHLY STATEMENT TOTAL.

Cardholder Printed Name

Cardholder Signature

Date

Supervisor's Signature

Questions re: VISA card, please contact Janine Hughes x 2815. PVSNET.ProCard questions please contact Claudia Hojnacki x2840.

Appendix B
Clearing Reports

To clear a report, place a check in the box to the left of the report and click on the **Delete** button at the bottom of the screen. You can clear all the records in the log by clicking on the **Clear All** button at the bottom of the screen.

### Report Log

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Report Name</th>
<th>Report Delivery</th>
<th>Report Output</th>
<th>Reports Created Between</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td></td>
<td>Email</td>
<td>Single</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Print Only</td>
<td>Multiple</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Log</td>
<td>Both</td>
<td></td>
</tr>
</tbody>
</table>

### Report Log Details

<table>
<thead>
<tr>
<th>Date Created Sort</th>
<th>Date Sent Sort</th>
<th>Date Range Sort</th>
<th>Report Name Sort</th>
<th>Download Sort</th>
<th>Resubmit Sort</th>
<th>Report Type Sort</th>
<th>Report Delivery Sort</th>
</tr>
</thead>
<tbody>
<tr>
<td>□</td>
<td>n/a</td>
<td>09/13/2002-09/19/2002</td>
<td>09/19/02 Transactions</td>
<td>Resubmit</td>
<td>Query</td>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>□</td>
<td>09/18/2002 06:44:28 am</td>
<td>09/13/2002-09/19/2002</td>
<td>Stmtnt</td>
<td>Download</td>
<td>Resubmit</td>
<td>Statement</td>
<td>Email</td>
</tr>
</tbody>
</table>
Accessing ProCard Web Site

Help is available.

In addition to this User’s guide, there is an online help feature within the product that you can use for assistance after you have initially logged on to PVS Net using your logon ID and password.

PVS.Net Online Help through Microsoft Internet Explorer.

Under the Welcome section of the toolbar Click on “help”
NOTE: The following two pages are a QUICK REFERENCE GUIDE providing basic information. Please consult the PVS.Net ProCard Guide for further details.

Quick Reference PVS NET

Includes: Using PVS Net
           Changing your password
           Updating your user information
           Reviewing Transactions
           Setting data display preferences
           Running Reports
Using PVS Net

Your PVS Net User ID:

Logging on

You must have a valid PVS Net user account to log on to the application.

To log on to PVS Net:
2. Click PVS Net Access.
3. Click Logon to PVS Net.
4. In the User ID field, enter your assigned logon ID.
5. In the Password field, enter your password.
6. In the Language drop-down list, select the language to use (English or French).
7. Click Logon.

Speak with your PVS Net Program Administrator if:
- You need a PVS Net account.
- You've forgotten your password or user ID.
- Your logon does not work.

Changing your password

You can change your password at any time. Depending upon the security policies of your company, you might have to change your password after a certain length of time (for example, every three months).

To change your password:
1. In the User area of the menu bar, click Settings.
2. In the Password field, enter a new password.
3. In the Confirm Password field, reenter the new password exactly as you entered it in Step 2.
4. Click Save.

Tips
- Passwords must be at least six characters in length and contain at least one numeric character (0-9).
- To protect its privacy, passwords do not display on-screen. An asterisk (*) displays for each character that you type.

Updating your user information

Update the information stored in your PVS Net settings any time your personal information changes. It is particularly important that you keep your email address current. PVS Net uses the email address stored in your settings to distribute your offline reports.

To update your user information:
1. In the User area of the menu bar, click Settings.
2. In the appropriate field, enter the new information.
3. Click Save.

Tips
- To replace an entire value, double-click to highlight the complete field. When you start typing, you replace the entire value.
- You can update any information that displays in a white box. You cannot update information that displays over a gray background.
Reviewing transactions

You can review transactions online or create offline reports. You specify the exact set of transactions that you want to review. You can then save that specification, or query, and rerun it at any time.

To review transactions:
1. In the User area of the menu bar, click Transactions.
2. Select a detail or summary report.
3. Select how you want the transactions sorted.
4. Select the cards for which you want to include transactions.
5. Specify the date range for the transactions.
6. Select an online or offline report. Online reports display on-screen in PVS Net. Offline reports are emailed to you, or you can download them from the report log.
7. To further restrict the transactions you retrieve, enter filtering conditions.
8. Click Run Report.
9. If you selected an offline transaction report:
   - To select a field, check its check box.
   - If you do not want a field to display, clear its check box.
   - In the Transactions table, select the data fields that you want to view for transactions.
   - If you have security rights to view the Pending Request log, use the Pending Request Log table to select whether you want to display posted requests.

Setting data display preferences

Using PVS Net preference settings, you can specify which data fields display on certain PVS Net pages.

To set your program preferences:
1. In the User area of the menu bar, click Preferences.
2. In the Records Per Page table, select how many records you want to display on a page: 10, 20, 50 or 100.
3. In the Card Fields table, select the data fields that you want to view for cards.
4. In the Transactions table, select the data fields that you want to view for transactions.
5. If you have security rights to view the Pending Request log, use the Pending Request Log table to select whether you want to display posted requests.
6. Click Save.