Entering Credits for Sales Tax into PCWS

Log in to PCWS. The Welcome to the P-Card Web Solution... screen appears. Click on P-Card:

![PC-Card Web Solution](image1)

Click on Order Log:

![Order Log](image2)
Select the appropriate cardholder and card from the list (the cardholder/card that the original tax was charged on):

The orders for this cardholder appear, if there are any. **Click the New Order button.**

Type in the ordered date (today's date is acceptable). **Tab to the Reference field.**
Type the invoice number that the tax was originally charged on, in the Reference field, if applicable.

Tab to the Vendor field and enter a portion of the vendor name, then click Find.

All the vendors meeting the entered criteria appear. Select the appropriate vendor by clicking the Load button in line with the vendor. Make sure that you load the correct vendor!
The vendor pops in and the cursor is in the Qty field. **Keep the Qty as 1.**

Tab to and enter an item description similar to below:

| No | Qty | Unit Price | Extended | Item Desc |
|默 | 1   | 0          | 0        | Tax Credit change an above invoice |
Tab to and change the Fund-Account information, if necessary. Make sure that it is applied to the same fund-account as the original transaction. (See the main PCWS instruction manual for detailed information for changing the fund-account.)

Please Note: If the credit needs to be split among multiple funds and/or accounts, you MUST enter the credit as a line item and perform the fund-account split on that line item. PCWS will not allow a fund-account split for a line item with a value of $0.00.

Click in the Sales Tax field and enter the amount of the tax to be credited. Enter the amount with a minus sign to specify it’s a credit, as shown below:

Please Note: If the credit needs to be split among multiple funds and/or accounts, you MUST enter the credit as a line item and perform the fund-account split on that line item. PCWS will not allow a fund-account split for a line item with a value of $0.00.
Hit Tab. Notice that this order shows as a credit:

Click the Save button.

A “PC” Order No. is assigned to the order and it is in the Order Log ready to be matched against a transaction.