FIN: Reassigning Credit Card Transactions

Overview

This document explains how to reassign a credit card transaction to another worker.

- The recommended browser for accessing Workday is Google Chrome. However, Mozilla Firefox and Apple Safari may also be used.

Considerations by Institution

- None

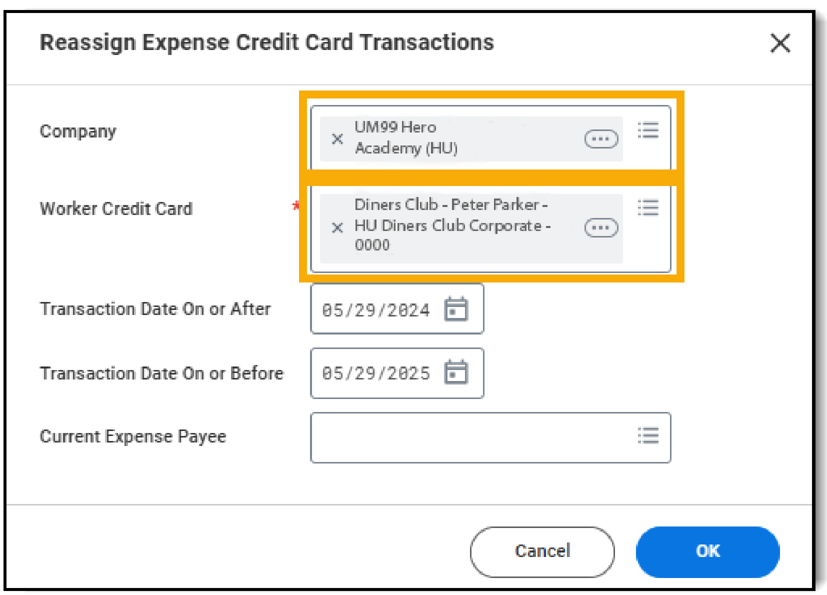
Icons Referred to in This Document

Prompt   Related Actions   Required Field   Notification

Inbox   Radio   Check

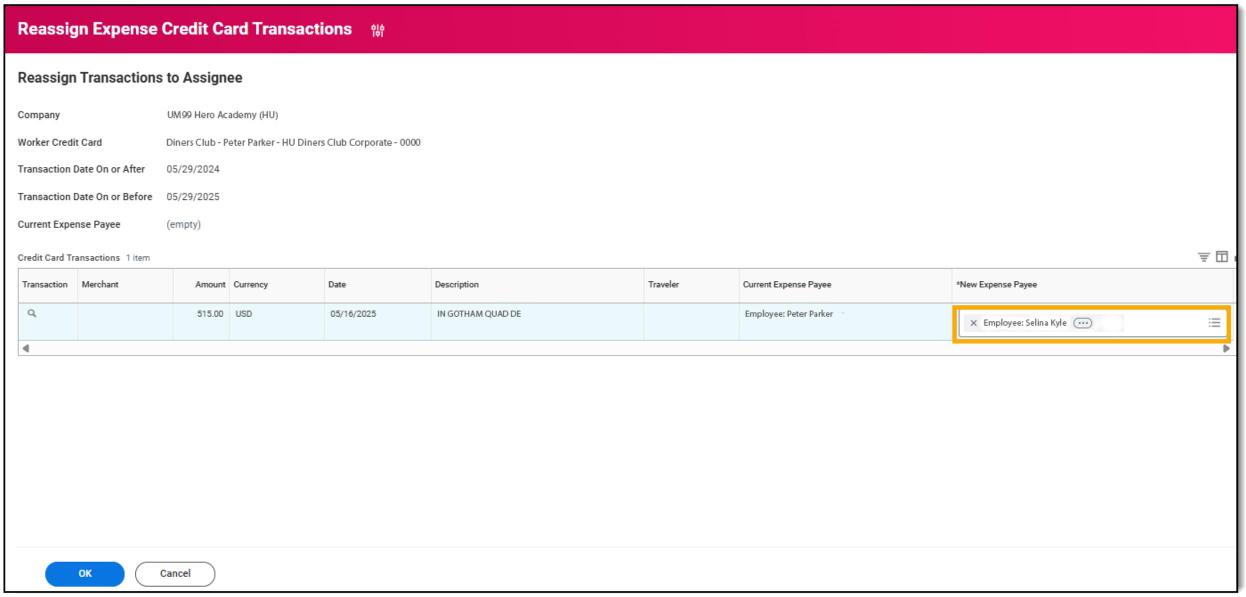
Reassigning A Credit Card Transaction

1. Enter ***Reassign Expense Credit Card Transactions*** into the **Search** bar and select the task.
2. The Reassign Expense Credit Card Transactions pop up displays.
3. Complete the following fields on the pop up:
   a. (Optional) **Company:** Select your appropriate institution.
   b. **Worker Credit Card:** Select your card.
   c. (Optional) Use the **Transaction Date On or After** and/or the **Transaction Date On or Before prompts** to limit the results returned by the search.
   d. Select **OK.**



4. The Reassign Expense Credit Card Transactions task displays.

5. Use the **New Expense Payee prompt** to select the worker to reassign the transaction to.
6. Select **OK.**



7. A confirmation page displays, indicating that the transaction has been reassigned.
8. Select **Done.**

Note: Once reassigned, the transaction displays for the recipient as a selectable charge in the Credit Card Transactions table of a draft expense report.