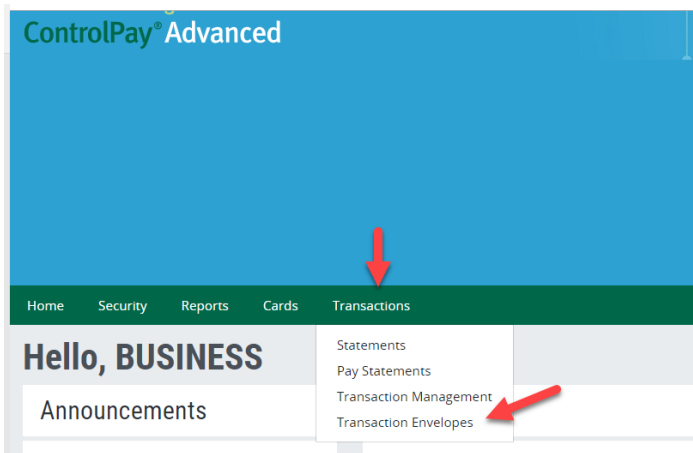


## Transaction Envelope Retrieval

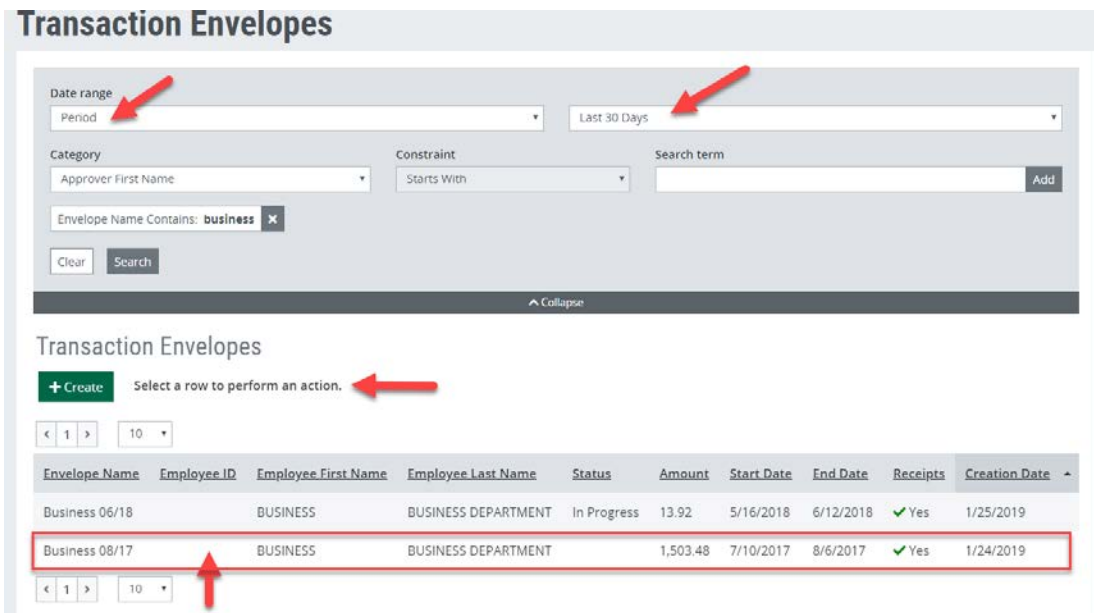
(Re-designed Commerce Bank website)

You can search for Transaction Envelopes after saving, before submitting for approval, or after submitting into workflow. Transaction Envelopes will be immediately available for a rolling 24 months and stored thereafter in ControlPayAdvanced (Commerce Bank) for five years.

1. From your green menu bar that runs across the top of the screen, navigate to **Transactions/Transaction Envelopes**.



2. Click on **Transaction Envelope**.
3. When this new page loads, you will see a list of envelopes available, if you need to search back farther, change the date range and click search.
4. Click on the row of the envelope you wish to work with, to bring up your action icons (Select a row to perform an action).



The screenshot shows the "Transaction Envelopes" page. At the top, there is a search filter section with the following fields: "Date range" (with a dropdown menu set to "Period" and a "Last 30 Days" button), "Category" (with a dropdown menu set to "Approver First Name"), "Constraint" (with a dropdown menu set to "Starts With"), and "Search term" (with a text input field and an "Add" button). Below these fields, there is a "Envelope Name Contains" field with the value "business" and a "Clear" button. A "Search" button is also present. Below the search filters, there is a "Transaction Envelopes" section with a "+ Create" button and a "Select a row to perform an action." prompt. Below this, there is a table with the following columns: Envelope Name, Employee ID, Employee First Name, Employee Last Name, Status, Amount, Start Date, End Date, Receipts, and Creation Date. The table contains two rows of data. The second row, "Business 08/17", is highlighted with a red border. A red arrow points to the "Business 08/17" row in the table. Below the table, there is a "Collapse" button and a "10" dropdown menu.

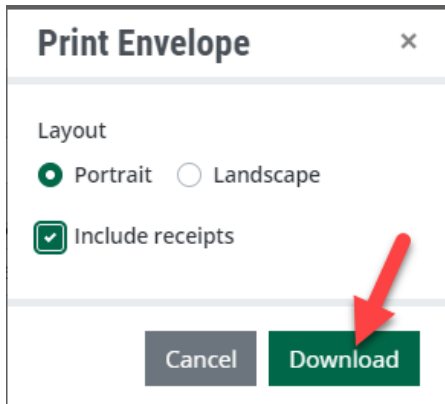
Envelope Name	Employee ID	Employee First Name	Employee Last Name	Status	Amount	Start Date	End Date	Receipts	Creation Date
Business 06/18		BUSINESS	BUSINESS DEPARTMENT	In Progress	13.92	5/16/2018	6/12/2018	✓ Yes	1/25/2019
Business 08/17		BUSINESS	BUSINESS DEPARTMENT		1,503.48	7/10/2017	8/6/2017	✓ Yes	1/24/2019

5. To view the envelope, click **Print**.

## Transaction Envelopes





6. A **Print Envelope** dialog box will open, you can choose Portrait, Landscape or to Download Receipts (recommended). Complete your options, then click **Download**.



7. When prompted, open the zip file.

8. A window will open showing all your receipt files as well as the Transaction Envelope file.

Name ^	Type	Compressed size	Password ...	Size	Ratio	Date modified
 Business 7-10-17 to 8-6-17	Adobe Acrobat Document	20 KB	No	27 KB	27%	1/29/2019 1:25 PM
 TransactionEnvelope	Adobe Acrobat Document	6 KB	No	8 KB	34%	1/29/2019 1:25 PM

9. You can open each receipt file to print or save as well as open the Transaction Envelope file to print or save.

**This completes the process for retrieving a Transaction Envelope**