

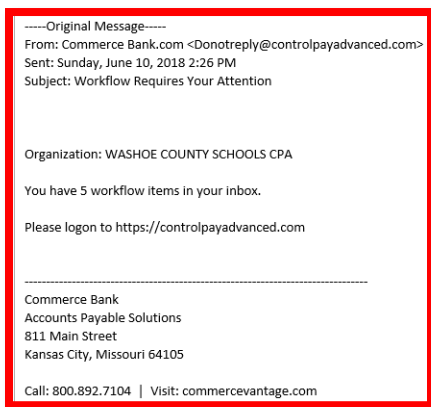
Transaction Envelope for Approvers

(Re-designed Commerce Bank website)

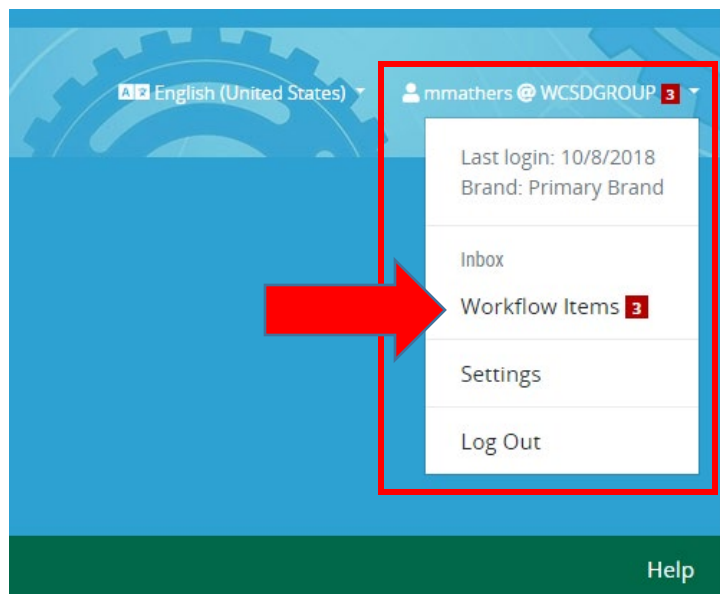
The Transaction Envelope in Commerce Bank will replace the Monthly Cardholder Statement. Your Transaction Management duties do not change. This new process only addresses how to approve the monthly reporting of cardholder transactions along with receipts.

Please note there is a feature built into the Transaction Envelope approval process that will auto approve all transactions in an envelope once a supervisor approves it, if they were not originally approved in Transaction Management. Best practice is to approve all P Card transactions in Transaction Management weekly after the cardholder has reviewed them. This allows the credit to refresh on the cards, which will only happen if the review and approval are completed in Transaction Management each week. We encourage all supervisors to approve weekly, rather than as part of the envelope approval, as this is only a monthly event.

1. As an approver, you will receive an email when you have a Transaction Envelope to approve.



2. Login to Commerce Bank and hover over your login name on the right hand side of your Home Page.



3. Click on the **Workflow Items** link. (This is a change from the previous version of Commerce, which used the Inbox.)

4. When this new page loads, you will see the Transaction Envelope(s) waiting for your approval.
5. Click on the row of the Transaction Envelope you want to view (a.) Select a row to perform an action (generate action icons), (b.) Select the action icon you want to work with.

a.

Workflow Items

Select a row to perform an action.

| <input type="checkbox"/> | Name | Submitter | Employee Name | Workflow Type | Amount | Split Amount | Billing Currency | Status | Last Change |
|--------------------------|----------------|------------------------------|------------------------------|----------------------|--------|--------------|------------------|-------------|----------------|
| <input type="checkbox"/> | Business 06/18 | BUSINESS BUSINESS DEPARTMENT | BUSINESS BUSINESS DEPARTMENT | Transaction Envelope | 13.92 | | USD | In Progress | 1/25/2019 4:04 |

b.

Workflow Items

Respond and History **Print** Approve

| <input type="checkbox"/> | Name | Submitter | Employee Name | Workflow Type | Amount | Split Amount | Billing Currency | Status | Last Change |
|--------------------------|----------------|------------------------------|------------------------------|----------------------|--------|--------------|------------------|-------------|----------------|
| <input type="checkbox"/> | Business 06/18 | BUSINESS BUSINESS DEPARTMENT | BUSINESS BUSINESS DEPARTMENT | Transaction Envelope | 13.92 | | USD | In Progress | 1/25/2019 4:04 |

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

Print Envelope

Layout

Portrait Landscape

Include receipts

8. When prompted, open the zip file. (The prompts may differ depending on the browser you use.)
9. A window will open showing the receipt file(s) as well as the Transaction Envelope file.

| Name | Type | Compressed size | Password ... | Size | Ratio | Date modified |
|-------------------------------|------------------------|-----------------|--------------|-------|-------|-------------------|
| Business 5-16-18 to 6-12-18 2 | Adobe Acrobat Document | 20 KB | No | 27 KB | 27% | 1/25/2019 5:02 PM |
| TransactionEnvelope | Adobe Acrobat Document | 3 KB | No | 6 KB | 49% | 1/25/2019 5:02 PM |

10. You can open each individual receipt file as well as open the Transaction Envelope file to review purchases, notes and account coding. When finished viewing receipts and envelope, close the file finder window.
11. When you are ready, place a check mark next to the envelope, then click **Approve**.

| | | | | | | | | | |
|-------------------------------------|----------------|------------------------------|------------------------------|----------------------|-------|--|-----|-------------|----------------|
| <input checked="" type="checkbox"/> | Business 06/18 | BUSINESS BUSINESS DEPARTMENT | BUSINESS BUSINESS DEPARTMENT | Transaction Envelope | 13.92 | | USD | In Progress | 1/25/2019 4:04 |
|-------------------------------------|----------------|------------------------------|------------------------------|----------------------|-------|--|-----|-------------|----------------|

Workflow Items

Respond and History **Print** **Approve**

12. A green message will be displayed indicating the Transaction Envelope has been moved on in workflow (to Business).

You have approved 1 workflow items.

13. Repeat for other Transaction Envelopes you may have in your queue.

This completes the process for approving a Transaction Envelope