Key2Purchase.com
Approver Quick Start Guide

About this guide

This guide is for new users of Key2Purchase.com. It includes an overview of Key2Purchase.com, and instructions on how cardholders review transactions and how to approve transactions.

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About Key2Purchase.com

Key2Purchase.com is a commercial payments solution containing purchasing or travel card management and reporting, and accounts payable automation.

Purchases made using your purchasing or travel card are recorded in Key2Purchase.com as transactions. Once the transaction posts, you may be asked to review the transaction, assign it the appropriate financial codes, add notes explaining the purchase, and attach receipts.

Depending on your organization's settings, you can submit transactions individually, or submit multiple transactions in a group known as a transaction envelope. Your manager will approve or reject the transactions, sending the rejected ones back to you for further explanation. At the end of the billing period, you can view a summary of your transactions in an electronic statement.

Log in for the first time

1. Navigate to the Key2Purchase.com login page.
2. Enter the username provided by your organization in the **Username** field.
3. Enter the temporary password provided by your organization in the **Password** field.
4. Enter your organization ID in the **Organization ID** field.
5. Click **Log In**.
6. Read the additional security message, and click **Send Me a Security Code**. An email containing a security code will be sent to the email address on file.
7. On the augmented login page, re-enter the temporary password in the **Password** field.
8. Enter the security code in the **Security Code** field.
9. Click **Log In**.
10. Read the terms and conditions of use, and select the **Accept** radio button.
11. Click **OK**.
12. Enter a new password in the **Password** field.
13. Enter the new password again in the **Confirm Password** field.
14. Click **Save**.
15. Use the challenge question drop-downs to select challenge questions, and enter corresponding answers in the **Answer** fields.
16. Enter the answers again in the **Confirm Answer** fields.
17. Click **Save**. The Key2Purchase.com dashboard will appear.

Cardholder

View a transaction

1. Navigate to the **Transaction ~~Maint~~ > Transaction Management** page.
2. Use the date range drop-downs to select appropriate values.
3. If desired, use the search criteria drop-downs and fields to select appropriate values, and click **Add**.
4. Repeat the previous step as many times as necessary.
5. Click **Search**. The results will appear in the Transactions grid.

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Review a transaction

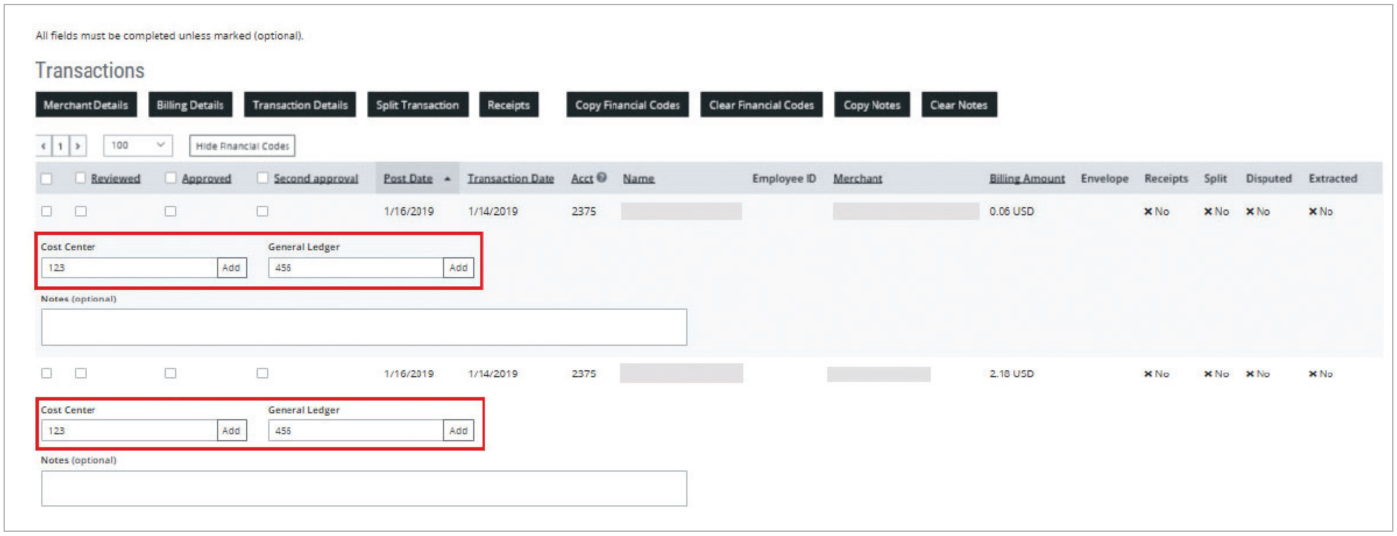
1. Navigate to the **Transaction** > **Transaction Management** page.

2. Use the date range drop-downs to select appropriate values.

3. If desired, use the search criteria drop-downs and fields to select appropriate values, and click **Add**.

4. Repeat the previous step as many times as necessary.

5. Click **Search**. The results will appear in the Transactions grid.



NOTE: If the transaction has already been assigned financial codes, skip to step 9.

6. Click the desired financial code to select it.

7. Repeat steps 6–7 as many times as necessary.

8. If required, enter an explanation in the **Notes** field.

9. Select the **Reviewed** checkbox.

10. Click **Save**. If your organization does not require receipts and has enabled transaction workflow, the transaction will be submitted for approval. Otherwise, proceed to the next step.

11. If required by your organization, upload receipts:

- **11.1.** Select the transaction again, and click **Transaction Details**. The **Transaction Details** page will appear.
- **11.2.** Click **Receipt(s)**. A receipt upload modal will appear.
- **11.3.** Click **Browse**. A file selection modal will appear.
- **11.4.** Navigate to the desired file, and click **Open**.
- **11.5.** Click **Upload Receipt(s)**.
- **11.6.** When the upload confirmation message appears, click **Close**.
- **11.7.** Click **Save**. If your organization has enabled transaction workflow, the transaction will be submitted for approval.

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Approver

View a transaction

1. Navigate to the **Transaction > Transaction Management** page.
2. Use the date range drop-downs to select appropriate values.
3. If desired, use the search criteria drop-downs and fields to select appropriate values, and click **Add**.
4. Repeat the previous step as many times as necessary.
5. Click **Search**. The results will appear in the Transactions grid.

View not reviewed transaction

1. Navigate to the **Transaction > Transaction Management** page.
2. Use the date range drop-downs to select appropriate values.
3. If desired, use the search criteria drop-downs and fields to select appropriate values, and click **Add**.
   - 3.1. Category: select **Review Type**
   - 3.2. Search term: select **Not Reviewed**
4. Repeat the previous step as many times as necessary.
5. Click **Search**. The results will appear in the Transactions grid.

Approve a transaction

1. Navigate to the **Transactions > Transaction Management** page (to search for individual transactions).
2. To view transactions on cards assigned to you and to cards you proxy, select the **Limit search to my cards** checkbox. The Hierarchy field will disappear.
3. To view transactions on cards assigned to a hierarchy, select **Find** (beneath Hierarchy), select the appropriate hierarchy from the Hierarchy Explorer modal, and choose **Finish Selection**. Alternatively, you can enter the hierarchy level directly into the Hierarchy field and choose **Select**.

NOTE: The name of the selected hierarchy will appear below the Hierarchy field.

4. Use the date range drop-downs to select appropriate values to locate the transaction(s) or envelope.
5. If desired, use the search criteria drop-downs and fields to select appropriate additional search values, and choose **Add**. Repeat as many times as necessary to enter all of the desired search criteria.
6. Select **Search**. The results will appear in the Transactions grid or the Transaction Envelopes grid.
7. Select the **Approved** checkbox for the transaction(s).
8. Select **Save**.

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Reject a transaction

1. Navigate to the **Transactions > Transaction Management** page (to search for individual transactions).
2. To view transactions on cards assigned to you and to cards you proxy, select the **Limit search to my cards** checkbox. The Hierarchy field will disappear.
3. To view transactions on cards assigned to a hierarchy, select **Find** (beneath Hierarchy), select the appropriate hierarchy from the Hierarchy Explorer modal, and choose **Finish Selection.** Alternatively, you can enter the hierarchy level directly into the Hierarchy field and choose **Select**.

NOTE: The name of the selected hierarchy will appear below the Hierarchy field.

4. Use the date range drop-downs to select appropriate values to locate the transaction(s) or envelope.
5. If desired, use the search criteria drop-downs and fields to select appropriate additional search values, and choose **Add**. Repeat as many times as necessary to enter all of the desired search criteria.
6. Select **Search**. The results will appear in the Transactions grid or the Transaction Envelopes grid.
7. Select the **Reject** checkbox for the transaction(s).
8. Select **Save**.

Download statement

1. Navigate to **Transactions > Statements**.
2. If desired, select the **My cards** checkbox to limit the results to cards assigned to you, and to cards you proxy. The Hierarchy field will disappear.
3. Alternatively, use the drop-downs in the Search to find applicable cards. By default, a Statement Closing Date criterion will be applied and set to the most recent closing date.
4. Select **Search**. Individual statements will appear in the Cards grid per row.
5. Select the desired statement record so that it is highlighted on the screen.
6. Select **Download Statement**. A PDF version of the statement will be downloaded to your computer.
7. Alternatively, download multiple statements at a time by selecting the checkboxes next to the corresponding statement records.
8. Click **Download Statement.** A zip file of the statements will be downloaded to your computer.