Key2Purchase.com Approver with Transaction Envelopes 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, create transaction envelopes, and approve those envelopes.

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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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Create a card-based transaction envelope

1. Navigate to **Transactions > Transaction Envelopes**.
2. Scroll down below the search and select **Create**. The **Create** page will appear.
3. 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.
4. Alternatively, to search by 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.

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**.
7. In the Cards grid, select the card so that it is highlighted on the screen.
8. Select **Create Envelope**.
9. If necessary, modify the **Employee first name** and/or **Employee last name** fields.
10. Enter a descriptive **Envelope name**.
11. Select a **Date range** radio button option and use the drop-downs or date fields to complete your selection.
12. Leave the **Autofill envelope with transactions from selected date range** checkbox unselected.
13. Select **Save**. The **Transactions** page will appear.
14. Select the **In Envelope** checkbox for one or more transactions.
15. Select **Save**.
16. For each transaction in the envelope:
17. Select **Add** next to the financial codes fields.

    17.1 The **Financial Codes** modal will appear.

    NOTE: The transaction may already be assigned financial codes. If this is the case, you can skip to step 18.

    17.2 Select the desired **financial code(s)**.

    17.3 If required, enter an explanation for the transaction in the **Notes** field.
18. If required by your organization, **upload receipts**.
19. Select **Save**.
20. To submit the envelope for approval, select **Submit to Workflow**. The **Submit for Approval** modal will appear. Select **Confirm**.

NOTE: Once it has been submitted into workflow, you will no longer be able to edit the transaction envelope or the transactions it contains.

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Add out-of-pocket expense to envelope

1. Navigate to the **Transactions > Transaction Envelopes** page.
2. Select the desired transaction envelope so that it is highlighted on the screen.
3. Select **Transactions.** This will open the **Transactions** page.
4. Select **Create Out of Pocket Transaction.**
5. Under **Type**, select the **Ad hoc** radio button.

NOTE: If your organization is not configured to allow for calculated fields in out-of-pocket transactions, the **Type** radio button options will not be available.

6. Enter the **Merchant name** and **Amount** in the respective fields.
7. Specify the **Transaction date** and **Posting date** by entering the dates directly into the fields or choose a date directly from the calendar by selecting the **Calendar** icon.

NOTE: The posting date is the date the transaction was submitted for approval.

8. Select **Save.**

Add mileage expenses to a transaction envelope

1. Navigate to the **Transactions > Transaction Envelopes** page.
2. Select the desired transaction envelope so that it is highlighted on the screen.
3. Select **Transactions.** This will open the **Transactions** page.
4. Select **Create Out of Pocket Transaction.**
5. Under **Type**, select the **Calculated** radio button. The screen will refresh.
6. If applicable, modify the **Billing Currency** field.
7. Use the **Calculated Field** drop-down to select **Mileage Rate** (or your organization's equivalent option).

NOTE: The calculated field and its rate is set by your organization. The options available to you in the drop-down depend on your organization's settings.

8. Enter the number of miles traveled in the **Number of Units** field.
9. Specify the **Transaction date** and **Posting date** by entering the dates directly into the fields or choose a date directly from the calendar by selecting the **Calendar** icon.

NOTE: The posting date is the date the transaction was submitted for approval.

10. Select **Save.**

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Create an out-of-pocket only transaction envelope

1. Navigate to **Transactions > Transaction Envelope**.
2. Select **Create**.
3. Select **Out of Pocket Only Envelope**.
4. The **Employee first name** and **Employee last name** will default to your information. If necessary, modify the information in these fields.
5. Enter a descriptive name in the **Envelope name** field.
6. Under **Date range**, select the radio button for the desired range (**Cycle**, **Month,** or **Custom**) and use the drop-down or date fields to complete the selection.
7. Select **Save**.

Delete a transaction envelope

If the transaction envelope has not yet been submitted for approval:

1. Navigate to the **Transactions > Transaction Envelope** page.
2. If desired, use the search filter fields and drop-downs to locate the transaction envelope.
3. Select the desired transaction envelope so that it is highlighted on the screen.
4. Select **Delete**.
5. Read the confirmation message and select **Delete**.
6. If the transaction envelope has been submitted for approval, it cannot be deleted. However, if the transaction envelope was rejected and the user does not want to or cannot resubmit the envelope, it can be zeroed out:
7. Navigate to the **Transactions > Transaction Envelope** page.
8. Select the desired transaction envelope so that it is highlighted on the screen.
9. Select **Transactions**. The **Transactions** page will open.
10. In the header of the **Transactions** grid, deselect the **In Envelope** checkbox. This will automatically deselect the checkboxes for all transactions in the envelope.
11. Select **Save**.
12. Navigate to the **Transactions > Transaction Envelope** page.
13. Select the transaction envelope again so that it is highlighted on the screen.
14. Select **Resubmit for Approval**.

16\. Read the confirmation message and choose **Confirm**.

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Submit a transaction envelope for approval

Via the Transactions page:

1. Navigate to the **Transactions** > **Transaction Envelopes** page.
2. Select the desired transaction envelope so that it is highlighted on the screen.
3. Select **Transactions**. The **Transactions** page will open.
4. Select **Submit to Workflow**.
5. Read the confirmation message and choose **Confirm**.

Via the Transaction Envelopes grid:

1. Navigate to the **Transactions** > **Transaction Envelopes** page.
2. Select the desired transaction envelope so that it is highlighted on the screen.
3. Select **Submit for Approval**.
4. Read the confirmation message and choose **Confirm**.

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.

Approve or reject a transaction envelope

1. On any page, hover over your username in the upper right-hand corner.
2. Select **Workflow Items**. This will bring you to the Workflow Items grid.
3. If desired, use the search filter drop-downs and fields to locate the desired transaction envelope.
4. Select the transaction envelope so that it is highlighted on the screen.
5. To approve the transaction envelope, select **Approve**.
6. To reject the transaction envelope: Select **Respond and History**.
7. Enter an explanation for the rejection in the **Notes** field.
8. Select **Reject**.

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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.

KeyBank

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