
Key2Purchase.com Cardholder 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 to use basic purchasing or travel card functionality.

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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 dropdowns 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.



Transactions

Review a transaction

1. Navigate to the **Transaction > Transaction Management** page.
2. Use the **date range** dropdowns to select appropriate values.
3. If desired, use the **search criteria** dropdowns 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.

All fields must be completed unless marked (optional).

Transactions

Merchant Details | Billing Details | Transaction Details | Split Transaction | Receipts | Copy Financial Codes | Clear Financial Codes | Copy Notes | Clear Notes

100 Hide Financial Codes

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Post Date	Transaction Date	Acct	Name	Employee ID	Merchant	Billing Amount	Envelope	Receipts	Split	Disputed	Extracted
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1/16/2019	1/14/2019	2375				0.06 USD		<input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> No
Cost Center		General Ledger													
<input type="text" value="123"/> <input type="button" value="Add"/>		<input type="text" value="456"/> <input type="button" value="Add"/>													
Notes (optional)															
<hr/>															
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1/16/2019	1/14/2019	2375				2.18 USD		<input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> No
Cost Center		General Ledger													
<input type="text" value="123"/> <input type="button" value="Add"/>		<input type="text" value="456"/> <input type="button" value="Add"/>													
Notes (optional)															
<hr/>															

— Financial code fields

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

6. Click the **Magnify glass** for Cost Allocation coding to appear.
7. Repeat step 6 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 **Receipts**. 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.



Create and submit a transaction envelope

1. Navigate to the **Transaction > Transaction Management** page.
2. In the **Transaction Envelopes** grid, click **Create** to open the **Create Transaction Envelope** page.
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**.
5. In the **My Accounts** section, select **Out of Pocket Only** or a card assigned to you.
6. If necessary, modify the **Employee First Name** and/or **Employee Last Name** fields.
7. Enter a descriptive name in the **Envelope Name** field.
8. Select a radio button for **Date Selection**, and use the dropdowns or date fields to complete the field.
9. Leave the **Autofill Envelope** checkbox unselected.
10. Click **Save**. The Transactions page will appear.
11. If you selected **Out of Pocket Only** in step 5, create an out of pocket transaction:
 - 11.1 Click **Out of Pocket**.
 - 11.2 If necessary, select the **Out of Pocket** radio button for **Type**.
 - 11.3 Enter the merchant name in the **Merchant Name** field.
 - 11.4 Enter the transaction amount in the **Amount** field.
 - 11.5 Click the **calendar icon** to open a calendar pop-up and select a date, or enter a date in the **Transaction Date** field.
 - 11.6 Click the **calendar icon** to open a calendar pop-up and select a date, or enter a date in the **Posting Date** field. The posting date for an out of pocket transaction is the date the transaction was submitted for approval.
 - 11.7 Click **Save**.
 - 11.8 Repeat steps 11.1-11.7 as many times as necessary.
12. If you selected a card in step 5, select the **In Envelope** checkbox for one or more transactions and click **Save**, and/or follow step 11 to create one or more out of pocket transactions.

NOTE: If the transaction has already been assigned financial codes, skip to step 13.

 - 12.1 Click the desired financial code to select it.
 - 12.2 Repeat step 12.1.
 - 12.3 If required, enter an explanation in the **Notes** field.

Continued on next page.

Create and submit a transaction envelope (continued)

All fields must be completed unless marked (optional).

Transactions

Merchant Details | Billing Details | Transaction Details | Split Transaction | Receipts | Copy Financial Codes | Clear Financial Codes | Copy Notes | Clear Notes

100 Hide Financial Codes

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Post Date	Transaction Date	Acct	Name	Employee ID	Merchant	Billing Amount	Envelope	Receipts	Split	Disputed	Extracted
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1/16/2019	1/14/2019	2375				0.06 USD		<input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> No
Cost Center		General Ledger													
1123 <input type="button" value="Add"/>		456 <input type="button" value="Add"/>													
Notes (optional)															
<input type="text"/>															
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1/16/2019	1/14/2019	2375				2.18 USD		<input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/> No
Cost Center		General Ledger													
1123 <input type="button" value="Add"/>		456 <input type="button" value="Add"/>													
Notes (optional)															
<input type="text"/>															

— Financial code fields

13. If required by your organization, upload receipts:

13.1 Click **Receipt(s)**. A receipt upload modal will appear.

13.2 Click **Browse**. A file selection modal will appear.

13.3 Navigate to the desired file, and click **Open**.

13.4 Repeat steps 13.2-13.3 as many times as necessary.

13.5 Click **Upload Receipt(s)**.

13.6 When the upload confirmation message appears, click **Close**.

13.7 Click **Save**.

13.8 Click **Submit to Workflow**.

13.9 Read the confirmation message, and click **OK**.

The transaction envelope and the transactions it contains will no longer be editable.

Download statements

1. Navigate to the **Transaction > Statements** page.
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, if desired, click the **magnifying glass icon** to select a hierarchy. A hierarchy modal will appear. Select the desired hierarch(ies), and click **Finish Selection**.
4. If desired, use the search criteria dropdowns and fields to select/enter appropriate values, and click **Add**. By default, a **Statement Closing Date** criterion will be applied and set to the most recent closing date.
5. Click **Search**. Individual statements will appear in the **Cards** grid per row.
6. Select the desired statement.
7. Click **Download Statement**. A PDF version of the statement will be downloaded to your local computer.
8. Alternatively, if desired, download multiple statements at a time by selecting the checkbox(es) next to the corresponding statement(s).
9. Click **Download Statement(s)**. A PDF version of the statements will be downloaded to your local computer.

Dispute a transaction

1. Navigate to the **Transaction > Transaction Management** page.
2. Use the date range dropdowns to select appropriate values.
3. If desired, use the search criteria dropdowns 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.
6. Select the desired transaction.
7. Click **Transaction Details**. The **Transaction Details** page will appear.
8. Click **Dispute**. The **Chargeback Request Form** will appear.
9. Complete the required fields.
10. Download the completed form and email/fax to the appropriate address or number.

Cards

View recent authorizations

1. Navigate to the **Card > Card Maintenance** page.
2. In the **Accounts** or **Cards** grid, respectively, select the desired card.
3. Click **Recent Authorizations**. A recent authorization modal will appear.
4. View the recent authorizations, and click **Close**.

Your Account

Change your password

1. Navigate to the top right corner that has your user name, hover over your user name and click **Settings**.
2. In the left-hand pane, click **Login Credentials**. The **Login Credentials** page will appear. Click **Change Password**.
3. Enter your current password in the **Enter Current Password** field.
4. Enter a new password in the **Enter New Password** field.
5. Confirm the new password in the **Confirm Password** field.
6. Click **Save**.