

## Administrator Approving a Cardholder's Envelope

[www.controlpayadvanced.com](http://www.controlpayadvanced.com)



### HAVING PROBLEMS LOGGING IN?

#### CASE SENSITIVE

- Ensure that the CAPS LOCK key is set correctly.
- USERNAME is not case sensitive
- PASSWORD is case sensitive

#### BROWSER COOKIES

- Make sure your computer accepts cookies. If browser cookies are not accepted correctly by your computer, it may:
- Block ability to log on
- Force log off upon navigation to a new page

#### SUPPORTED BROWSERS and PLATFORMS

- Microsoft Internet Explorer 9, 10, and 11

### USER LOG IN

USERNAME:   
 PASSWORD:   
 ORGANIZATION ID:

Remember My Username

1. INDEPENDENCEGROUP (All caps)

2. If you check the box it will remember your Username and Organization ID



**Hello, LANCE**

Username: a15386  
Org Group: INDEPENDENCEGROUP  
Role: Commerce Bank Cardholder Default  
Last Login: 3/8/2016

**My Links**

- [Transaction Envelope \(15\)](#)
- [Transaction Management \(12\)](#)
- [Workflow Worksheet \(8\)](#)
- [Transaction Report \(1\)](#)
- [Create a Transaction Envelope \(1\)](#)

**Announcements**

New(0) Old(1)

There are currently no new announcements

**Cardholder Information**

Account: XXXX-XXXX-XXXX-4367 (STOUT, LANCE)

**Account Information**

Credit Limit: 2,500.00  
# of Transactions in Current Cycle: 0  
# of Unreviewed Transactions in Last 30 Days: 0

MCC Summary (last 30 days)  
No transactions during the last 30 days.

[Recent Activity \(show\)](#)

**Quick Links**

- [Manage Transactions](#)
- [Unreviewed Transactions](#)
- [View Statements](#)
- [Change My Password Options](#)
- [Create a Transaction Envelope](#)

**Inbox**

1 [Inbox Item](#)  
(Requires Attention)

**Reports**

- [Transaction Report](#)
- [Account Report](#)

3. Click on Inbox Item

Security Manager **Inbox**

**Workflow Search**

Search For:  Requires Action  
Workflow Submission Date:

Workflow Type:   
Workflow Name:

Workflow Status:   
Submitter Last Name:

**Workflow Items**

Actions	Name	Submitter	Workflow Type	Amount	Billing Currency	Status	Last Change
	RC20160311	Rhonda Ogle	Transaction Envelope	41.74	USD	In Progress	3/14/2016 9:25 AM

Records per page: 20

4. Click here to see envelope history

**Envelope History**

Security Manager | **Inbox** | Workflow History

[Open Transaction Envelope RO20160311](#) ← 5. Click to Open Transaction Envelope details

**Workflow History**

Approver Name	Start Hierarchy	End Hierarchy	Status
	Initial Submission	Lance Stout Approvals	In Progress

Notes:

Action: **Approve** | Save | Cancel

Approve: Send the item to the next approver.  
Rejected to Submitter: Send the item back to the submitter for correction and resubmission.

**Transaction Envelope**

Transaction Maintenance | **Transaction Envelope** | Transactions

Envelope Summary

Envelope Name:	RO20160311	Envelope Submitter:	Rhonda Ogle (ROgle1)	Calculated Total:	USD 41.74
Transactions In Envelope:	1	Begin Date:	3/5/2016	End Date:	3/11/2016
Total USD Transactions:	1	Transactions Amount:	USD 41.74	Out of Pockets Amount:	USD 0.00

Financial Codes: View Hide

**Transactions**

Actions	Post Date	Trans Date	Act#-4	Name	Merchant	Billing Amount	Billing Currency	OOP	Split	Disputed	Receipt?
	3/7/2016	3/4/2016	9152	OGLE, RHONDA	IN OFFICE PRODUCTS ALLIA	41.74	USD				✓

PO # - Line #  
260269-16

PO Status (C = Closed, O = Open)  
C

Invoice Number (AP Entry Only)  
Invoice Date (AP Entry Only)

Supplies for the Health Clinic

6. Click here to see additional transaction detail including receipt. If there are multiple transactions in an envelope, you need to do this for each transaction.

Save | Approve | Print Envelope | Close

**Transaction Detail**

Transaction Maintenance | Transaction Management | **Transaction Details**

Transaction Details for Account Number: XXXX.XXXX.XXXX.9152

Post Date:	3/7/2016	Trans Date:	3/4/2016
Reference Number:	24892166064000310958884	Merchant:	IN OFFICE PRODUCTS ALLIA
Amount:	41.74 USD	Account Transaction ID:	29814196

Go To: Merchant Information • Billing Information • Sign Off History • Flags & Notes • Comments • Splits

Merchant Information

Billing Information

Sign Off History

Flags & Notes

Reviewed:  Approved:  Sales Tax Not Billed:  Sales Tax: 0.00

Note: Supplies for the Health Clinic

Comments

Splits

Save | Dispute | Cancel

Upload Receipt(s) | View Receipt(s) ← 7. Click here to view receipt

**Receipt**

**Faxed Receipts**

No Faxed Receipts Found

**Uploaded Receipts**

Actions	Uploaded Date	Filename	Type	Size
	3/14/2016 9:18:50 AM	PO 260269-16 with Receipt.pdf	PDF	46.0 KB

8. Click here to download receipt

9. Click to close once you have viewed receipt

Close

Transaction Maintenance | Transaction Management | **Transaction Details**

[Back to Search](#) ← **10. Click here to return to transaction list**

**Transaction Details for Account Number: XXXX-XXXX-XXXX-9152**

Post Date: 3/7/2016  
 Reference Number: 24692166064000310958884  
 Amount: 41.74 USD

Toggle: [Expand All](#) • [Collapse All](#)

**Merchant Information**

**Billing Information**

**Sign Off History**

**Flags & Notes**

Reviewed:  Approved:  Sales Tax Not Billed:  Sales Tax: 0.00

Note: Supplies for the Health Clinic

**Comments**

**Splits**

[Save](#) [Dispute](#) [Cancel](#)

[Upload Receipt\(s\)](#) [View Receipt\(s\)](#)

**Approval**





Transaction Maintenance | Transaction Envelope | **Transactions**

**Envelope Summary**

Envelope Name:	RO20160311	Envelope Submitter:	Rhonda Ogle
Transactions In Envelope:	1	Begin Date:	3/5/2016
Total USD Transactions:	1	Transactions Amount:	USD 41.74

**Transactions**

1

Actions	Post Date	Trans Date	Act# 4	Name	Merchant
   	3/7/2016	3/4/2016	9152	OGLE, RHONDA	IN OFFICE PRODUCTS ALLIA
	PO # - Line # 260269-16	PO Status (C = Closed, O = Open) C	Invoice Number (AP Entry Only)	Invoice Date (AP Entry Only)	
Supplies for the Health Clinic					

1

[Save](#) [Approve](#) [Print Envelope](#) [Close](#)

**11. Once you have looked at each transaction/receipt and are ready to approve the envelope click "Approve". This will submit the envelope to the next process in the workflow with is Account Payable.**

If you have any questions please contact:

- Judy Luce - Ext 10084
- Aaron Hooper - Ext 10067
- Rhonda Ogle - 10059