

Searching for (really old) NOT REVIEWED transactions in Commerce Bank

1. From your Commerce Bank home page, Quick Links, click on Transactions.
2. Change the Date Range to Custom.
3. Type in the full fiscal year: 7/1/xx to current date.
4. Under the Category pull down, choose Review Type, then Equal To, then Not Reviewed, click Add.
5. Remove any other search criteria items you may have by clicking on the x next to that item.
6. Click Search.

Most transactions will have posted to your budget already, so do not change account numbers, please just add a detailed note, check the Reviewed box and Save. Remember your notes should be specific. Typing just “supplies” is not acceptable. If there are registration or travel related charges, the notes should include WHO, WHAT, WHERE, WHEN (MM/DD/YYYY).

Call the Business Process Trainer at 775-789-3438 if you need help.

The screenshot shows the 'Transaction Management' page in the Commerce Bank system. The page has a green navigation bar at the top with links for Home, Administration, Security, Payables, Reports, Cards, Transactions, and Help. Below the navigation bar, the breadcrumb trail reads 'Washoe County SD Group / Transactions / Transaction Management'. The main heading is 'Transaction Management'. The page contains several search filters: 'Organization' (WASHOE CO SCHOOLS PCARD), 'Hierarchy' (Find or enter a hierarchy level, Select, Limit search to my cards), 'Date range' (Custom, 07/01/2022, 04/05/2023), 'Category' (Account Number), 'Constraint' (Equal To), and 'Search term' (Add). A red box highlights the 'Date range' section, and a red speech bubble points to the end date field with the text 'This date should be the current date'. Another red box highlights the 'Review Type Equal To: Not Reviewed' filter. At the bottom, there are 'Clear' and 'Search' buttons, and a 'Collapse' link.

Commerce Bank

Home Administration Security Payables Reports Cards Transactions Help

Washoe County SD Group / Transactions / Transaction Management

Transaction Management

Organization WASHOE CO SCHOOLS PCARD

Hierarchy
Find or enter a hierarchy level Select Limit search to my cards
within level WASHOE CO SCHOOLS PCARD

Date range
Custom 07/01/2022 04/05/2023

Category Account Number Constraint Equal To Search term Add

Review Type Equal To: Not Reviewed X

Clear Search

^ Collapse

This date should be the current date