

## Searching for (really old) REVIEWED BUT NOT APPROVED 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 Reviewed, click Add.
5. Under the Category pull down, choose Approve Type, then Equal To, then Not Approved, click Add.
6. Remove any other search criteria items you may have by clicking on the x next to that item.
7. Click Search.

Most transactions will have posted to your budget already, so do not change account numbers. Please make sure the card holder/reviewer has typed adequate notes to describe the purchase in detail, and that you are aware of the purchase. This is a clerical exercise to catch up on older items, doing so will allow the credit on the card to refresh in full.

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

The screenshot shows the 'Transaction Management' page in Commerce Bank. The top navigation bar includes links for Home, Administration, Security, Payables, Reports, Cards, Transactions, and Help. The breadcrumb trail indicates the path: Washoe County SD Group / Transactions / Transaction Management. The main title is 'Transaction Management'. Below this, the 'Organization' is set to 'WASHOE CO SCHOOLS PCARD'. The 'Hierarchy' section has a search bar with 'Find' and a 'Select' button, and a dropdown showing 'within level WASHOE CO SCHOOLS PCARD'. The 'Date range' section is highlighted with a red box and contains a 'Custom' dropdown, a date field with '07/01/2022', and another date field with '04/17/2023'. A red callout bubble points to the '04/17/2023' date field with the text 'This date should be the current date'. The 'Category' section has a dropdown set to 'Account Number'. The 'Constraint' section has a dropdown set to 'Equal To'. The 'Search term' section has a text input field and an 'Add' button. Below these, there are two filter items: 'Review Type Equal To: Reviewed' and 'Approve Type Equal To: Not Approved', each with a close button (X). At the bottom, there are 'Clear' and 'Search' buttons. A 'Collapse' link is visible at the very bottom.

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 04/17/2023

Category: Account Number Constraint: Equal To Search term: [ ] Add

Review Type Equal To: Reviewed X Approve Type Equal To: Not Approved X

Clear Search

^ Collapse

This date should be the current date