

# How to Respond to TAP report in Canopy

9 Steps [View most recent version](#) 

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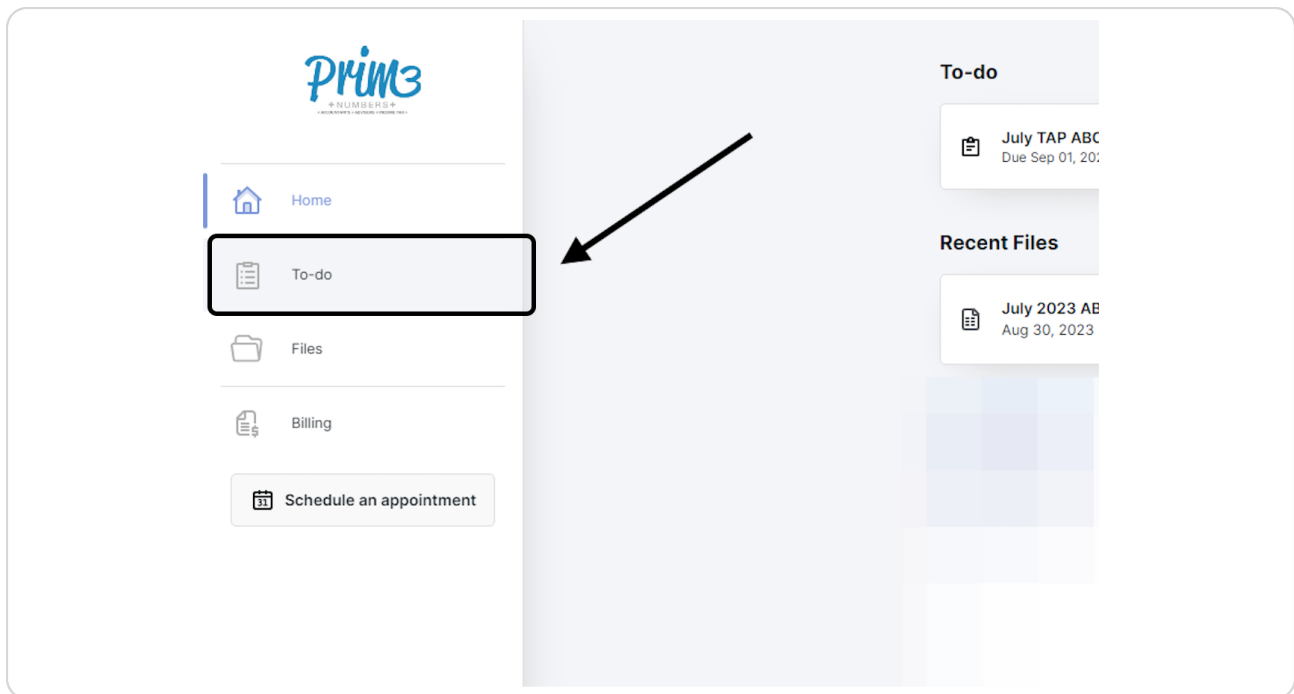
Created by  
Amanda Lynnes

Creation Date  
August 30, 2023

Last Updated  
August 31, 2023

## STEP 1

On the Home page click the To-do header



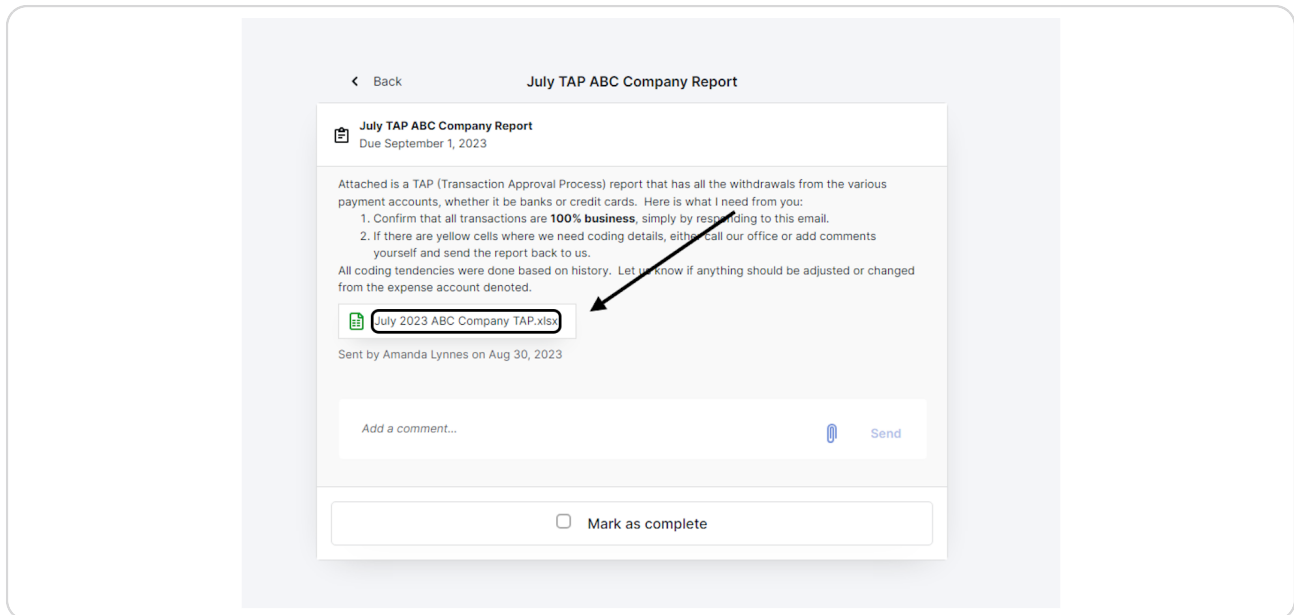
## STEP 2

Click on TAP Report To-do



### STEP 3

**Click on the name of the report i.e. "July 2023 ABC Company TAP.xlsx"**



### STEP 4

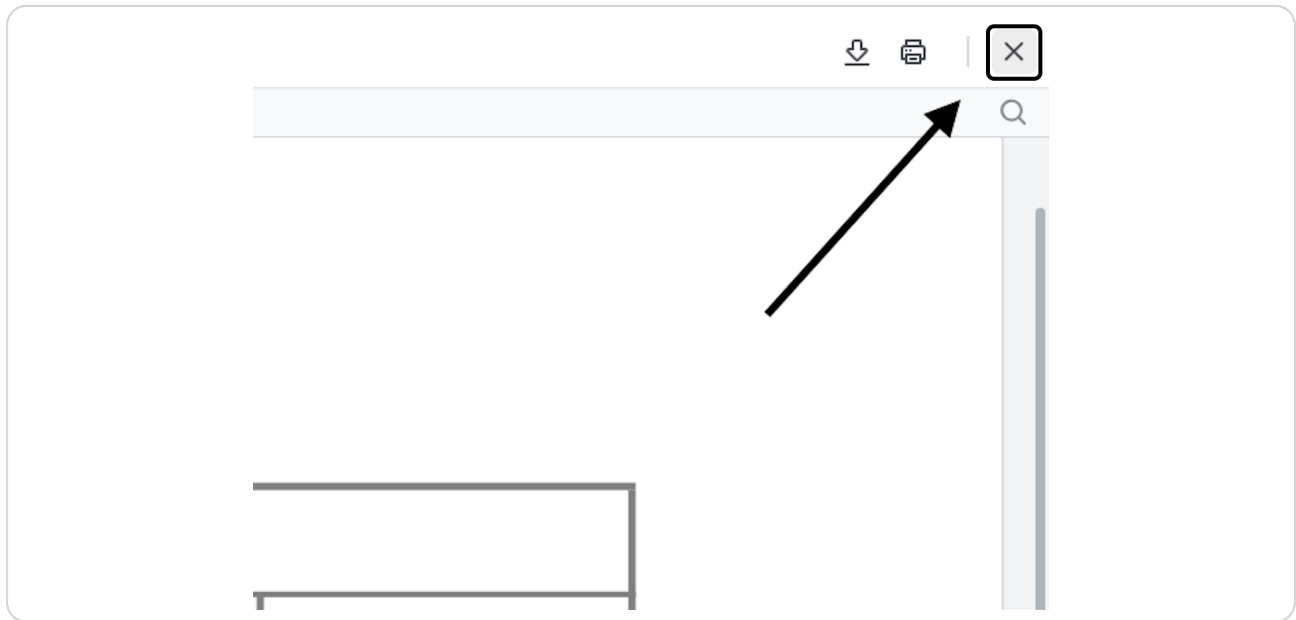
**click on "Download"**

In order to update the TAP report you will want to download the excel document and save to your computer. Once appropriate changes are made, you will need to upload to the To-do task.



## STEP 5

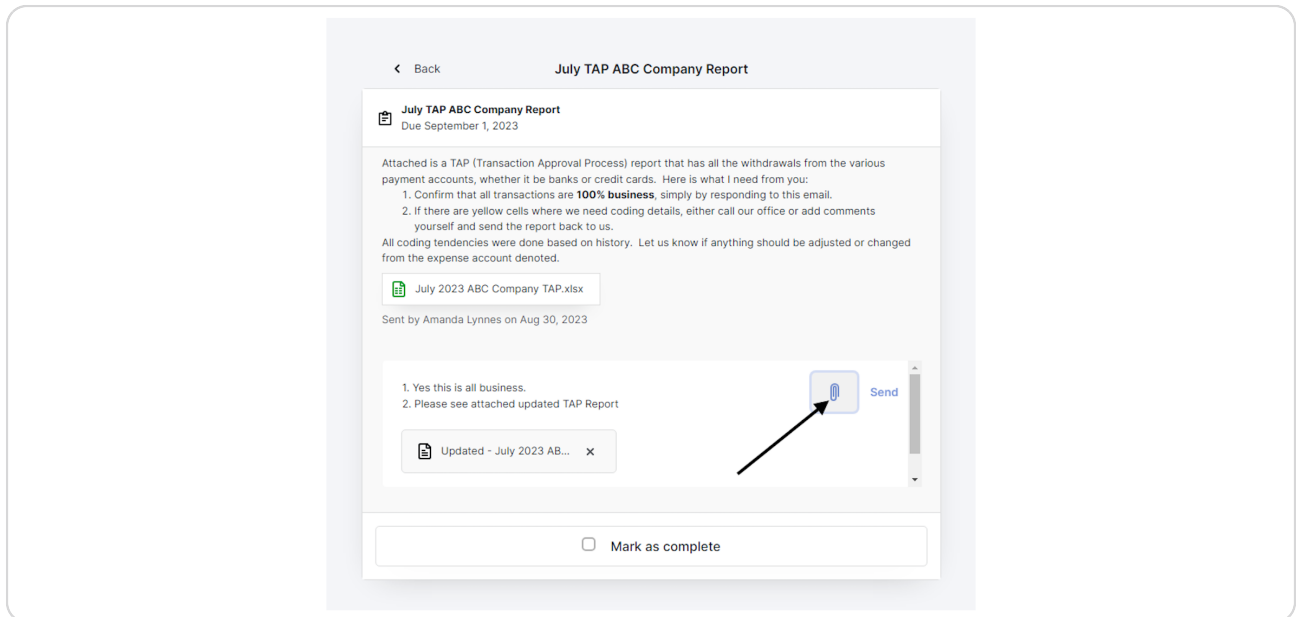
To get back to the To-do task, click the X in the upper right corner.



## STEP 6

### Responding to the To-do step 1

First, attach the updated TAP Report by clicking the paper clip.



## STEP 7

### Responding to the To-do step 2

Click "Add a comment..." to add any dialog. This is where you would confirm that all transactions are 100% business.

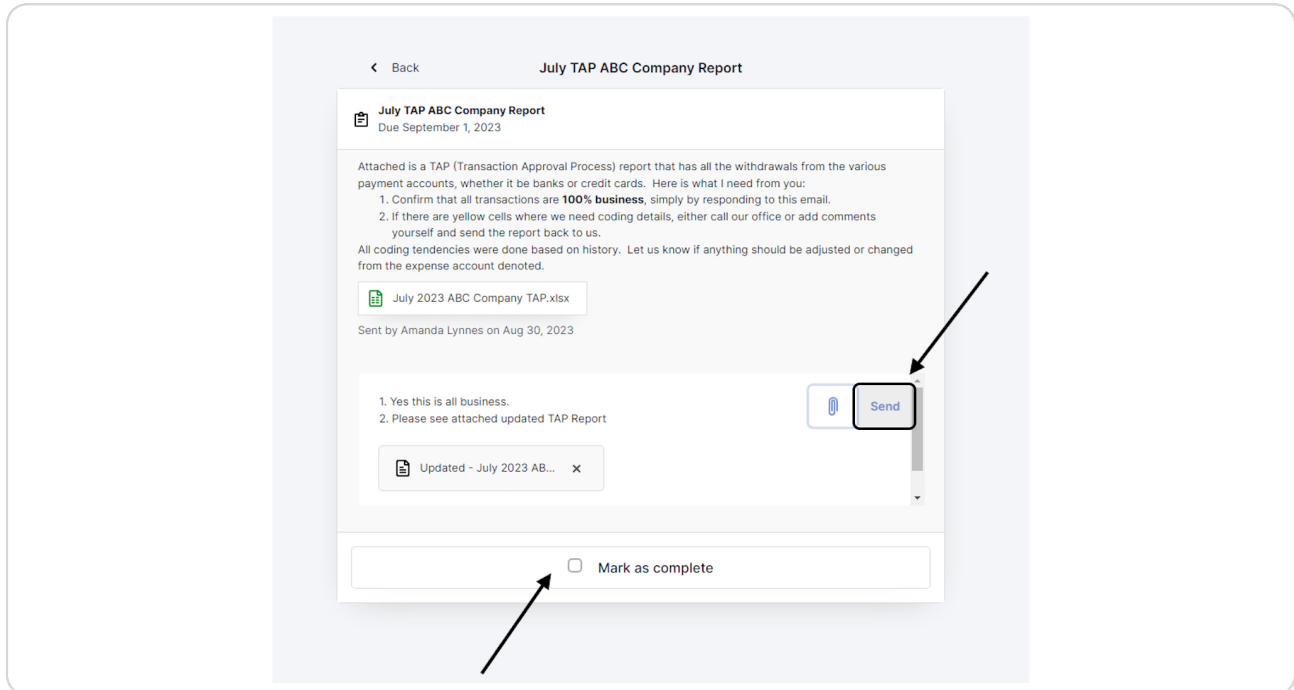
The screenshot shows a mobile application interface for a task titled "July TAP ABC Company Report". At the top, there is a "Back" button and the title "July TAP ABC Company Report". Below this is a card for the task, which includes a clipboard icon, the title "July TAP ABC Company Report", and the due date "Due September 1, 2023". The card contains the following text: "Attached is a TAP (Transaction Approval Process) report that has all the withdrawals from the various payment accounts, whether it be banks or credit cards. Here is what I need from you: 1. Confirm that all transactions are **100% business**, simply by responding to this email. 2. If there are yellow cells where we need coding details, either call our office or add comments yourself and send the report back to us. All coding tendencies were done based on history. Let us know if anything should be adjusted or changed from the expense account denoted." Below the text is an attachment icon and the file name "July 2023 ABC Company TAP.xlsx". Below the attachment is the text "Sent by Amanda Lynnes on Aug 30, 2023". At the bottom of the card is a response box with a blue border. It contains two lines of text: "1. Yes this is all business." and "2. Please see attached updated TAP Report". To the right of the text is a blue paperclip icon and a "Send" button. An arrow points from the top right of the response box to the "Send" button. Below the response box is a checkbox labeled "Mark as complete".

## STEP 8

### To complete the upload

Click send and "Mark as complete"

IMPORTANT: "Mark as Complete" otherwise Prime Numbers is not notified that you have responded.



The screenshot shows a mobile application interface for a report titled "July TAP ABC Company Report" with a due date of September 1, 2023. The report content includes instructions for confirming transactions and coding details, along with an attached file "July 2023 ABC Company TAP.xlsx". At the bottom of the report content, there is a "Send" button. Below the report content, there is a section for "1. Yes this is all business." and "2. Please see attached updated TAP Report", with an attached file "Updated - July 2023 AB...". At the very bottom of the form, there is a checkbox labeled "Mark as complete". Two black arrows are present: one pointing to the "Send" button and another pointing to the "Mark as complete" checkbox.

## STEP 9

Click on "Back" to return the main screen

