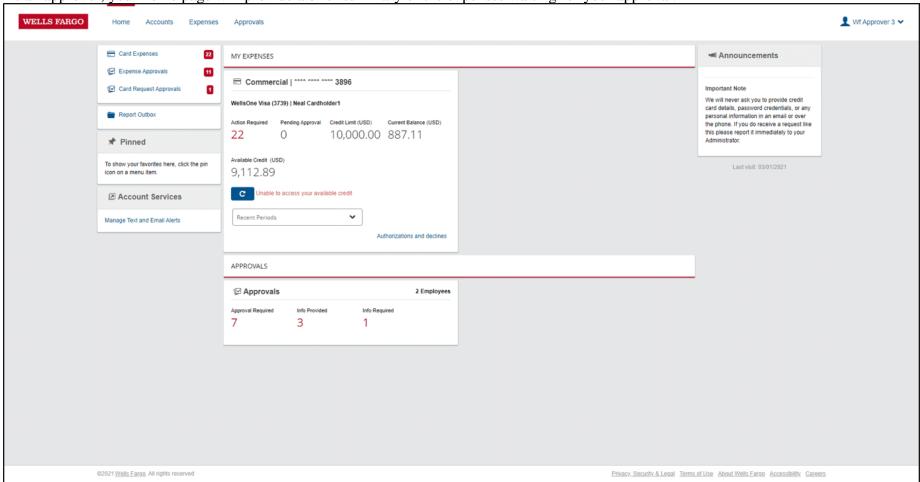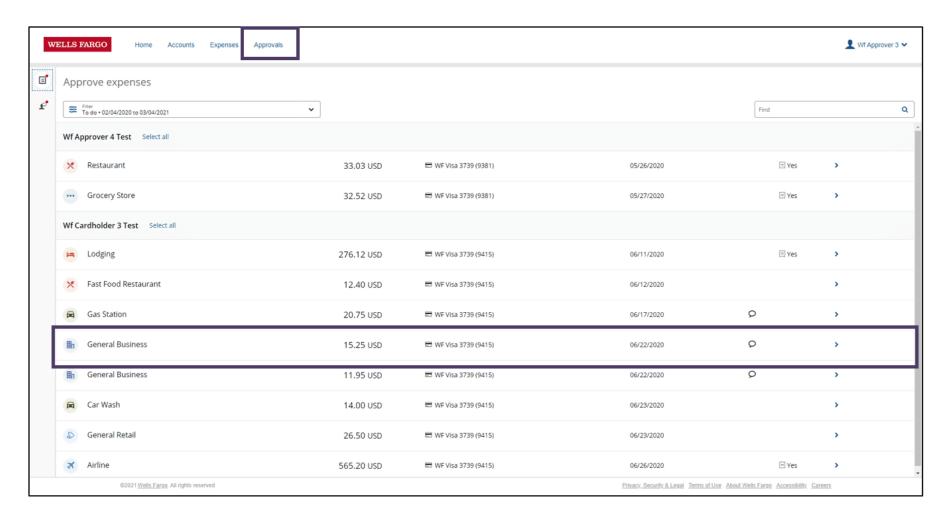Approving transactions

Approver view

As an approver, your home page will provide a brief summary of the expenses waiting for your approval.
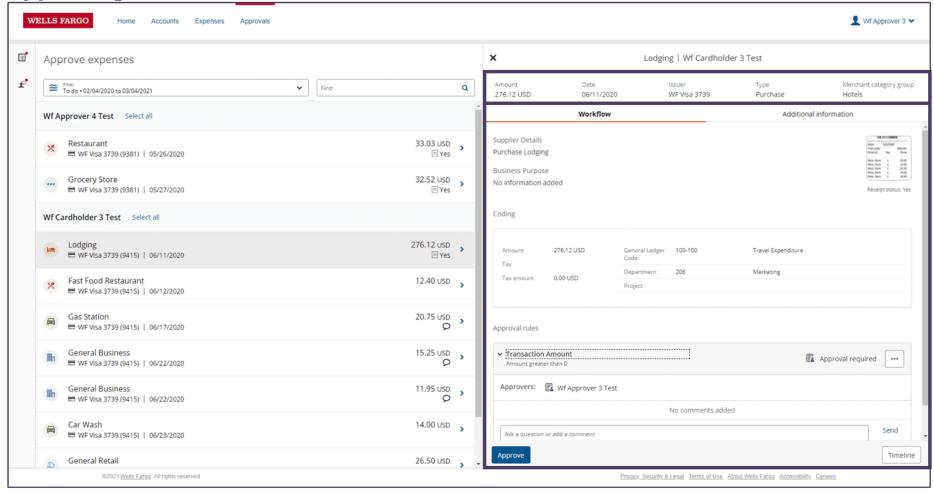

Approving transactions

Let's walk through the steps of approving a transaction.

Approval summary

To approve individual transactions, click on the **Approvals** tab. Here you will see a list of the transactions requiring your approval.

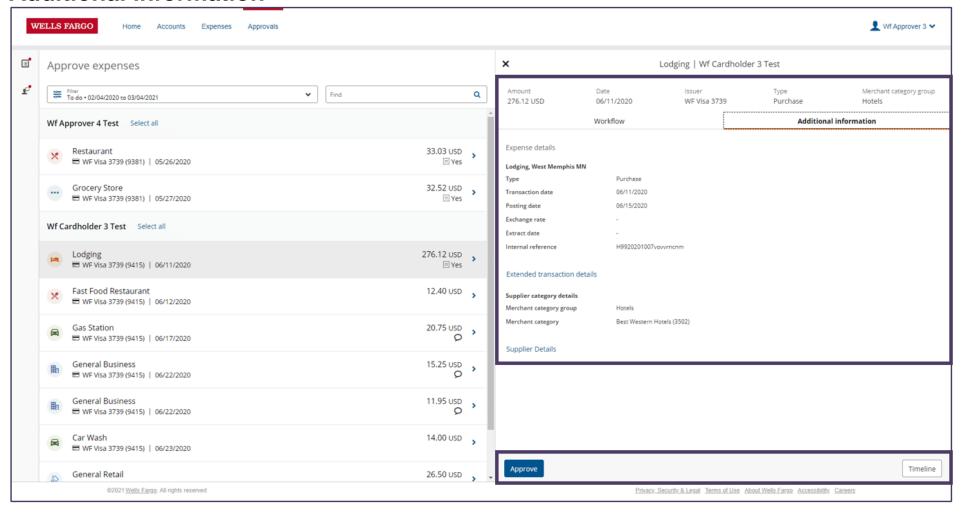Select on an expense to open it.

Approving transactions

When the expense window opens, you will see the expense summary at the top.

In the larger window you can see the Workflow information which includes the receipt image and Coding details.
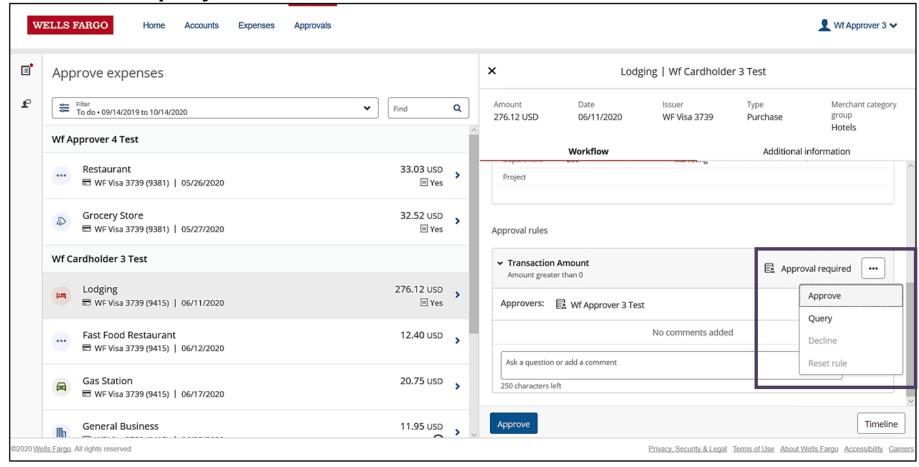
Additional information

The **Additional Information** tab provides extended transaction details such as Transaction date and Posting date.

The **Timeline** button at the bottom right allows you to see details about the expense requesting process such as when it was created and coded.

Once you are ready to approve the transaction, select **Approve**.

Transcription query

If you need additional information for a transaction, or part of the required information is missing, select **Query** from the menu button, enter a comment and select **Send**. (You can also click on an approval rule and go directly to the comments section.)

This will send the transaction back to the cardholder where they will be asked to provide more information.
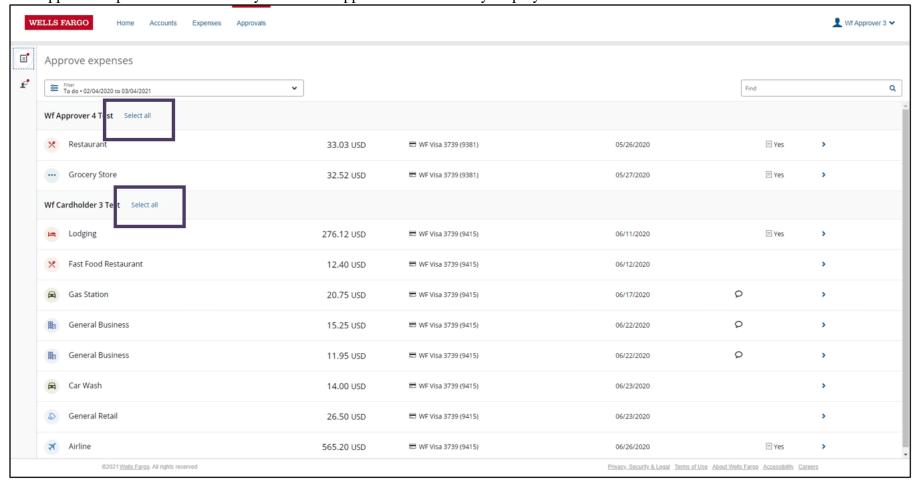
Once they respond, it will reappear in your to do list.

Note: If you are returning an expense to the cardholder, a comment is required in the note field shown above

Then, when the Cardholder is ready to send the expense back for approval, a comment is also required in the note field. If the Cardholder does not include a comment, that expense will not be sent back for approval.
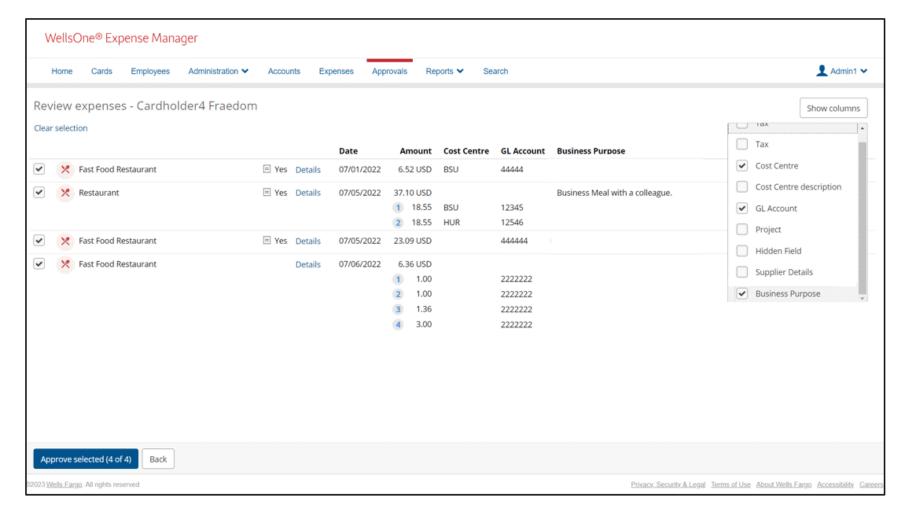
Batch approval

The Approval expenses screen allows you to batch approve transactions by employee.

Choosing **Select all** next to an employee will take you to the **Review expenses** screen.

The Review expenses screen provides you with the details you need to make your approval decisions.
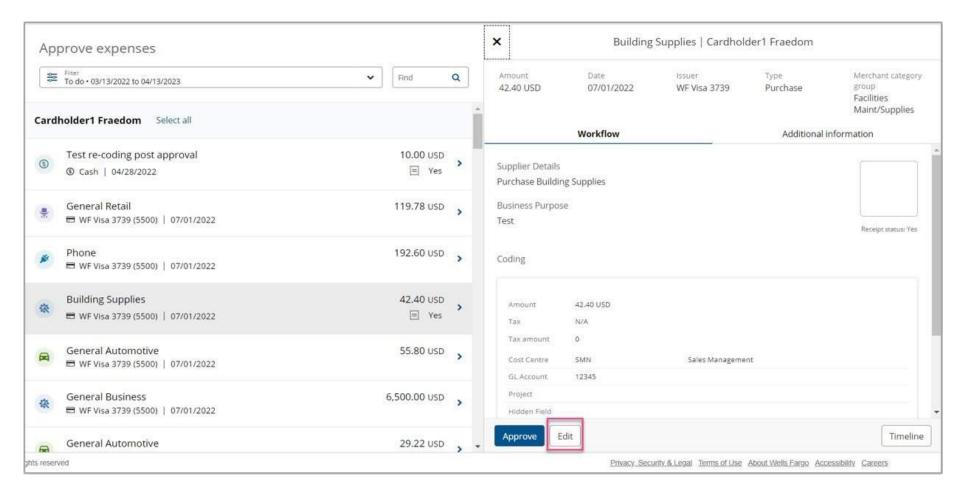
Transaction status

Transactions will appear once cardholders have completed all required information and can have these three statuses, To Do, Awaiting Response and Completed.

Edit transactions

A new right has been added to allow an Approver to edit a Cardholder's transaction. Once the approver is assigned the right, they may edit expenses.
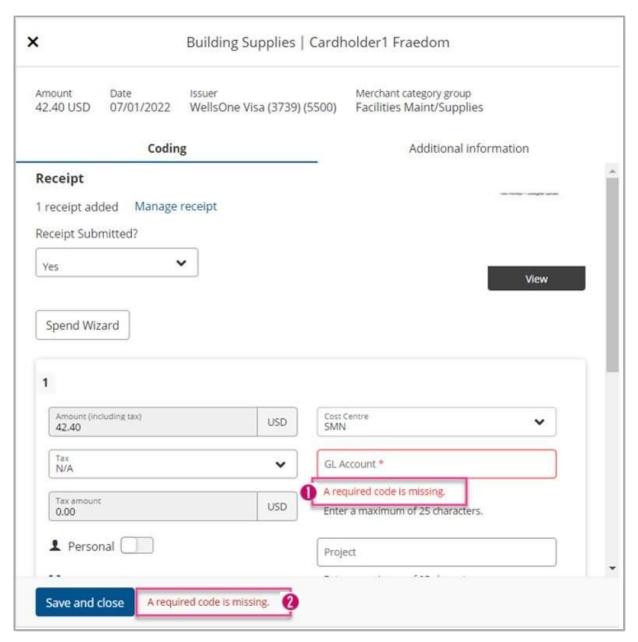
When the approver selects an expense for approval, a read-only expense details pane displays at right, with an **Edit** button.
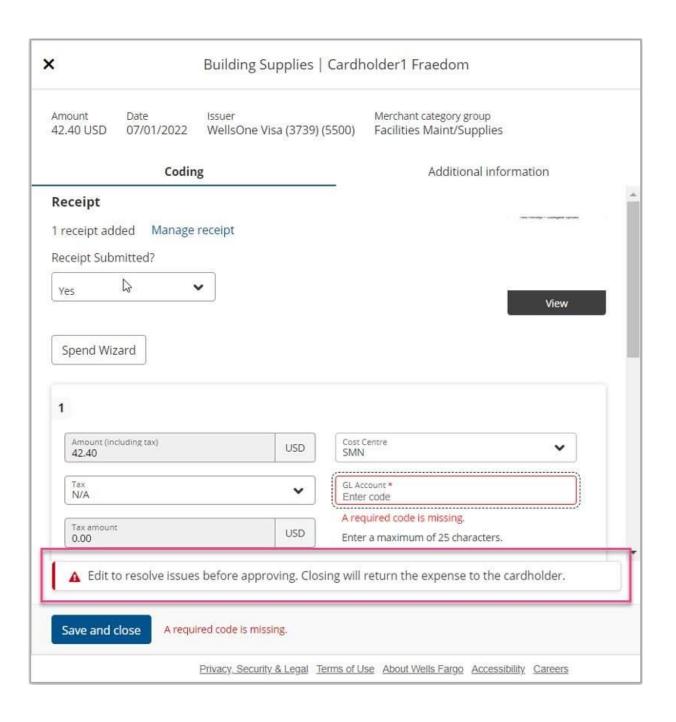
The following fields are available to edit:
- Edit Coding
- Add a receipt (delete will not be available)
- Add/Edit Business purpose

When the approver selects the **Save and close** button, if expense information remains missing or incorrect, a message will display.

Here you see **"A required code is missing"**. The expense cannot be approved while there are outstanding validation issues.

If the approver does not fix the missing or incorrect information and selects **Save and close**, they will be notified that continuing to close will return the expense to the cardholder.

✕ Building Supplies | Cardholder1 Fraedom

Amount | Date | Issuer | Merchant category group
42.40 USD | 07/01/2022 | WellsOne Visa (3739) (5500) | Facilities Maint/Supplies

Coding | Additional information

Receipt

1 receipt added   Manage receipt

Receipt Submitted?

Yes ⌄

[View]

[Spend Wizard]

1

Amount (including tax)
42.40 | USD

Cost Centre
SMN ⌄

Tax
N/A ⌄

GL Account *
Enter code

A required code is missing.

Tax amount
0.00 | USD

Enter a maximum of 25 characters.

⚠ Edit to resolve issues before approving. Closing will return the expense to the cardholder.

[Save and close]   A required code is missing.

When approvers are using the **Select All** function on the **Review expenses screen**, expenses can be individually opened and edited by selecting **Details**.