How to Approve Transactions - for Managers

Your company may require that Cardmembers submit transactions for Manager Approval in @Work Reconciliation. As a Manager, you can approve transactions from the Transaction List view, or the Transaction Detail view.

Approving Transactions from the Transaction List View

When reviewing transactions for a Cardmember – Managers can approve transactions from the All Transactions tab in the Transaction List view.

1. Select the desired transactions by using the Transaction Selection checkbox in the leftmost column of the Transaction List.
2. Select the Approve button above the Transaction Headings to submit the transactions for Manager Approval. **Note:** your company may require that you approve transactions individually. In this case, if you select more than one transaction, the Approve button will be grayed out and not selectable.
Using the Needs Approval Tab, and Mass Approval

3. As a Manager – if your company requires approvals - you will have a **Needs Approval** tab in the Transaction List View. This tab shows only the transactions you have not yet approved.

4. If your Company allows – you can click the **Approve All** button in this view, to approve all of the transactions for the selected Cardmember, at once. **Note:** If your company does not allow this type of Mass Approval – you can still select individual transactions to approve, as shown on the previous page.
Approving from the Transaction Details View

Managers can review the details of a Cardmember transaction, by clicking on that transaction in the Transaction List view. The Transaction Detail view has several tabs which show additional transaction information.

5. As a Manager, you can approve a transaction from any Detail Tab in the Transaction Detail view, by clicking the Approve button.