March 2020 Release
Approval Screens

Quick Reference Guide
Enhancements to the Approval experience…

### OLD VIEW

<table>
<thead>
<tr>
<th>Employees</th>
<th>Period</th>
<th>Invoiced Required</th>
<th>Invoiced Invoiced</th>
<th>Approval Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Doe</td>
<td>24 Dec 2018</td>
<td>-</td>
<td>-</td>
<td>2</td>
</tr>
<tr>
<td>Jane Smith</td>
<td>24 Jan 2019</td>
<td>-</td>
<td>-</td>
<td>1</td>
</tr>
</tbody>
</table>

### UPDATED VIEW

**Approve expenses**

<table>
<thead>
<tr>
<th>Employee</th>
<th>Description</th>
<th>Amount</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sarah Smith</td>
<td>Profile Publishing</td>
<td>$100.00 NZD</td>
<td>20 Jul 2019</td>
</tr>
<tr>
<td></td>
<td>BeesBox.com</td>
<td>$67.70 NZD</td>
<td>28 Jul 2019</td>
</tr>
<tr>
<td></td>
<td>Carnival Espresso</td>
<td>$14.13 NZD</td>
<td>10 Jul 2019</td>
</tr>
<tr>
<td></td>
<td>Travel</td>
<td>$207.45 NZD</td>
<td>12 Aug 2019</td>
</tr>
<tr>
<td></td>
<td>ATM Cash Withdrawal</td>
<td>$205.14 NZD</td>
<td>12 Aug 2019</td>
</tr>
<tr>
<td></td>
<td>Taxi &amp; Taxi Supplier for Hotel</td>
<td>$1,738.50 NZD</td>
<td>11 Aug 2019</td>
</tr>
<tr>
<td></td>
<td>BeesBox.com</td>
<td>$212.00 NZD</td>
<td>12 Aug 2019</td>
</tr>
<tr>
<td></td>
<td>BeesBox.com</td>
<td>$6,080.08 NZD</td>
<td>20 Aug 2019</td>
</tr>
</tbody>
</table>

**Workflow**

- Purchase Profile Publishing

**Additional information**

- Description: Purchase Profile Publishing

- Categorization:
  - Finance: Expense
  - Category: Travel
  - Department: HR: Sydney G
Defaulting to a To do list, the Approval status filter lets you see items you have To do, items you have already Completed, or items Awaiting response from the cardholder.

Use other Filters to help you focus on the expenses needing your attention.

Search using the Amount greater than filter or Find to search for specific accounts based on amount, merchant category name (hotels, airlines, etc), employee name, date, account, card number, or amount.

Icon for when policy alert has been triggered. Other new icons include:
- Query response
- Linked receipt
- Expense report
- Ongoing dispute
Approval Screen

Details tab

**Workflow** tab displays by default (see **Workflow** tab for more details).

**Additional information** tab shows additional expense-related information (see page 7 for more details).

**Approve** button allows you to approve all available rules in a single action.

**Options** menu lets you access:

1. **Timeline**
   - Display an audit history of the expense

2. **Advanced approvals**
   - Opens the legacy **Approvals** screen.

Confidential and proprietary © Fraedom
Approval Screen

Workflow tab

1. **Coding** panel gives review of coding structure in detail.
   - If Spend Wizard was used, name displays in a link, when clicked will open up more details about the expense coding.

2. **Policy rule** when triggered, expand to view optional comments by cardholder

3. Each **Approval rule** triggered by the expense shows its own separate panel
   - Expand to view each rule and action accordingly.
Additional information tab

Additional information tab displays other expense-related information such as extended transaction details, reference codes, and supplier details.

This information may help you to better understand the expense before approving or declining it.

Please note these will only be visible where provided in the bank file.

For more details into card expenses Extended transaction details displays any card data the issuer provided for this transaction.

The Supplier details link opens a panel that provides information about merchant location, date added, tax reference, and vendor reference along with other supplier details.
Approval rules

With the new Approval screens, you’ll be able to take relevant approval actions easily with the Approval Rules highlighted to you at the bottom of the screen.

Click to expand each rule, which tells you whether or not you have the right to action it. Some rules appear as View only.

Approve each rule individually
For each rule, Approve, Decline, Query, and Reset rule options appear in the Rule actions menu (…)

Please note: Decline only available when supported by company configuration

Approve all button
The primary approval action, Approve, allows you to approve all available rules.

QUICK TIP
If only one rule displays for an expense, the entire expense moves from one list to another list.

- Approve or Decline - The expense appears in your Completed list.
- Query - The expense appears in your Waiting response list.
- Reset rule - The expense appears in your To do list.

If there are multiple rules for the expense, the expense can appear in one, two or all three lists.
Query or decline an approval rule

**Query an expense**
If you’re unsure about an expense or want it modified before approving, you can query the cardholder by asking a question or adding a comment.

**Decline an expense**
Declining a rule requires you to add a comment.

Once you add the comment and click **Decline**, the expense appears in your **Completed** list.

**Note:** Decline is the final status of the expense. If the expense has more than one rule and one of the rules is declined, the entire expense is eventually declined even if other rules are approved. You or other approvers may still need to take an action (approve or decline) for other rules.
Requisition and expense reports

**Requisitions/Expense reports**
Requisitions/requests and expense report approval features can be accessed in the navigation bar on the left of the screen.

**New Navigation bar**
A navigation side bar has been included in the new Approvals area where the user can navigate to the menu items from a single entry point. Clicking an item in the menu (except for Expenses) opens the list of statements with a red dot indicating a period including actionable items.