US Bank Approver Functions

The Approver is responsible for logging in and providing Final Approval of Cardholder transactions and receipts, entering notes and correcting departmental FOAP/account codes if needed.

On the Homepage, the Approver can access transactions by clicking on Transaction Management and choosing the Manager Approval Queue:
This will bring up the list of all transactions waiting for final approval. The top of the page has filters to narrow down the list if needed.

Scroll down to the list of transactions. On the list of transactions, click the Approval Status link on the line of the transaction you are working with. Link may say Pending, Approved, Pulled Back, or Final Approved:

The Transaction Summary will come up. Click on the Summary tab to begin and make Approvals.
This tab has all the system transaction information. Once you have viewed all necessary information on all tabs, you can approve the transaction by clicking the Approve button:

If there is a problem, you can begin the dispute process by scrolling down to the Dispute button:

Click on the Allocations tab to view or change the FOAP coding for the transaction. If you make any changes, be sure to click the Save Allocations button:
If the merchant has sent Line Item data in the transaction, there will be a Transaction Line Items tab visible. Clicking this will let you see the exact items that were purchased:

The Comments tab allows you to leave any comments needed to explain this purchase. When saved, the comment is hidden and a link appears to reveal it.
The Approval History tab will show what actions have been taken, by whom, any changes, and date & time markers.

If you need to view a particular cardholder’s transactions or prefer to approve one card at a time, use the Transaction List to view the card transactions and the Manager’s Queue from within the card account to approve.

You can View All transactions, Open transactions (from the current open billing cycle), or individual billing cycles. Choose from the pull-down menu and click Search.