Credit Cards - Quick Start Guide (4)
Approving Transactions (Quick Check - Approver manual Section C)

- Click into “Approvals”
Click into the cardholder name
1. Review the high level information. Does the spend look reasonable?

2. Check that code doesn’t contain “HOLDCC” or “6300”*

3. If you see “VAT” check that a UK VAT receipt has been attached by clicking on the “Yes” in the Image column**

4. If all of the above looks ok, then check the box and click on “Approve Selected Items”

5. If anything is wrong then you need to let the cardholder know that they have a correction to make. To do this - see next slide.

* These are holding codes and not valid charge codes
** A valid UK VAT receipt must contain a VAT number on it
1. Click into the second radial button (will normally be an exclamation mark)

2. Enter some details about what is wrong in the "Approver Comments" box

3. Select "Information required"

4. HIT SAVE

5. This will change the status of the transaction and send it back to the cardholder for correcting.

NOTE: DO NOT SELECT "DECLINED". THAT SHOULD ONLY BE USED IF THE SPEND IS UNAUTHORISED AND THE CARDHOLDER IS TO REFUND THE MONEY TO THE UNIVERSITY**

** See Section D5 of the manual – “Declining” a transaction will automatically send a note to Finance staff who will then liaise with the cardholder in order to get the funds repaid to the University