

FlexiPurchase Approval Guide

Generic User Guide 2022.R2

Issue date: 4 July 2022



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Introduction

This Approval Guide will take you through the process of approving your employee's card and cash transactions in FlexiPurchase. You can also refer to the online help by clicking [Help](#) from the Personal Settings drop down menu in FlexiPurchase.

Note: The screens, options, and labels on your environment may vary from the examples in this document, depending on the configuration for your organisation.

If you have any questions regarding FlexiPurchase, please contact your primary FlexiPurchase administrator:

Name	Email
xxx	xxx

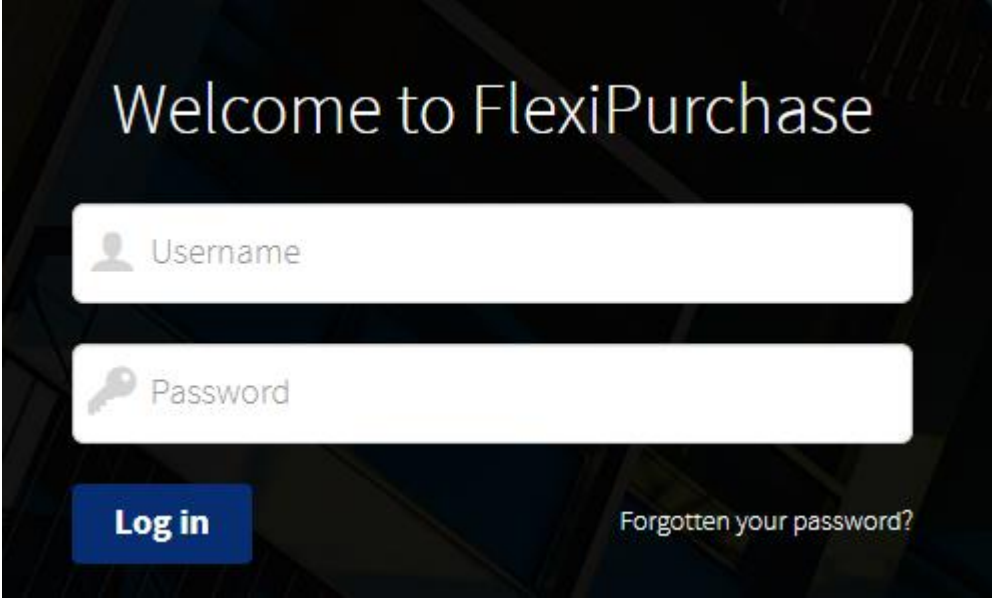
Approver responsibilities

As an approver, you must:

- Comply with your organisation's Corporate Expense Policy.
- Delegate your approval responsibilities to another approver prior to taking leave. Please contact your FlexiPurchase administrator for information on how to do this.
- Ensure your employees have submitted all receipts and tax invoices for their transactions.
- Ensure your employees have included a description of the transaction in FlexiPurchase.
- Inform your FlexiPurchase administrator of any changes to your details.
- Review and verify that GST codes and coding information is entered correctly by your employees.
- Ensure your employees are not using their card for any personal expenditure.

Logging in

1. Go to <https://flexipurchase.com/>
2. Enter your **Username** and **Password**.
3. Press the **Enter** key on your keyboard or click **Login**.



The image shows the FlexiPurchase login interface. At the top, it says "Welcome to FlexiPurchase". Below this are two input fields: the first is labeled "Username" with a person icon, and the second is labeled "Password" with a key icon. At the bottom left is a blue "Log in" button, and at the bottom right is a link that says "Forgotten your password?".

Note: Depending on your company setup, the login disclaimer message may appear. Read the standard terms and conditions and click **Accept** to proceed.

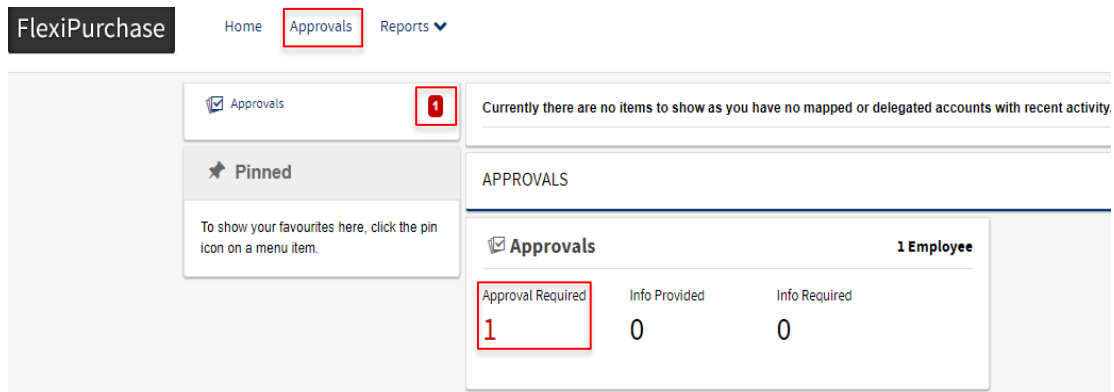
Viewing transactions requiring approval

If there are transactions that require your approval, an indicator displays next to **Approvals** in the **main menu**. A count of items requiring your approval displays beside **Approvals** in the quick actions area, under the **Approvals** heading.

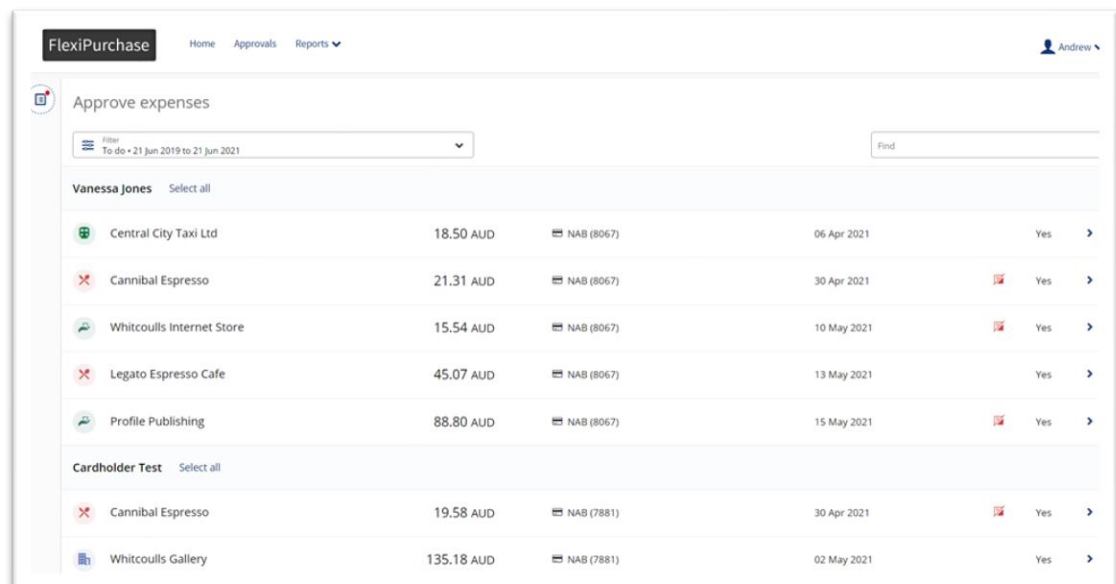
1. Either:

- Click **Approvals** in the quick actions area, or
- Select **Approvals** on the menu bar, or

Click **Approval Required** in the Approval Dashboard



The **Approve expenses** screen appears. This screen is arranged by employee, and transactions needing approval are grouped by transaction type, e.g. card issuer or cash expenses.



In the **Approve Expenses** screen, click on a desired transaction to approve. The transaction will open on the right-hand side of the screen. You will be able to see relevant information on the transaction including coding information, attached receipt, expense description and supplier information and policy alerts.

FlexiPurchase

Home Approvals Reports

Andrew

Approve expenses

Filter To do • 21 Jun 2019 to 21 Jun 2021

Find

Vanessa Jones Select all

Central City Taxi Ltd

NAB (8067) | 06 Apr 2021

18.50 AUD

Yes

Cannibal Espresso

NAB (8067) | 30 Apr 2021

21.31 AUD

Yes

Whitcoulls Internet Store

NAB (8067) | 10 May 2021

15.54 AUD

Yes

Legato Espresso Cafe

NAB (8067) | 13 May 2021

45.07 AUD

Yes

Profile Publishing

NAB (8067) | 15 May 2021

88.80 AUD

Yes

Cardholder Test Select all

Cannibal Espresso

NAB (7881) | 30 Apr 2021

19.58 AUD

Yes

Central City Taxi Ltd | Vanessa Jones

Amount 18.50 AUD

Date 06 Apr 2021

Issuer NAB

Type Purchase

Merchant category group Transportation

Workflow

Additional information

Supplier Information

Purchase Central City Taxi Ltd

Expense Description (Mandatory)

Test

Receipt status: Yes

Coding

Amount 18.50 AUD

Tax code AUS GST

Tax amount 1.68 AUD

GL Code 101

CC Code AA

Testing

Testing

Approval rules

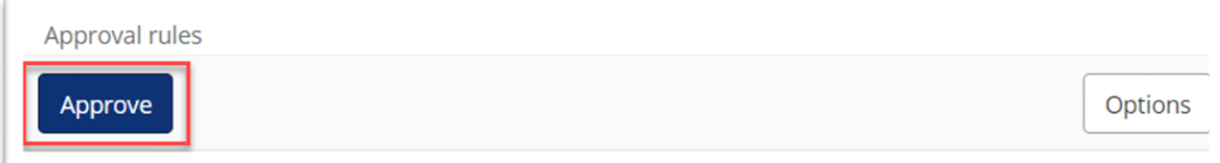
Approve

Options

Actioning approvals

Approving

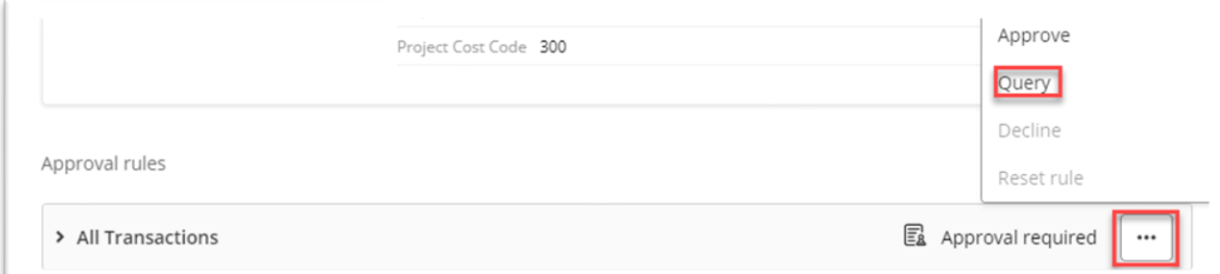
To approve a transaction, click on the approve button located at the bottom of the open transaction.



Querying a Transaction

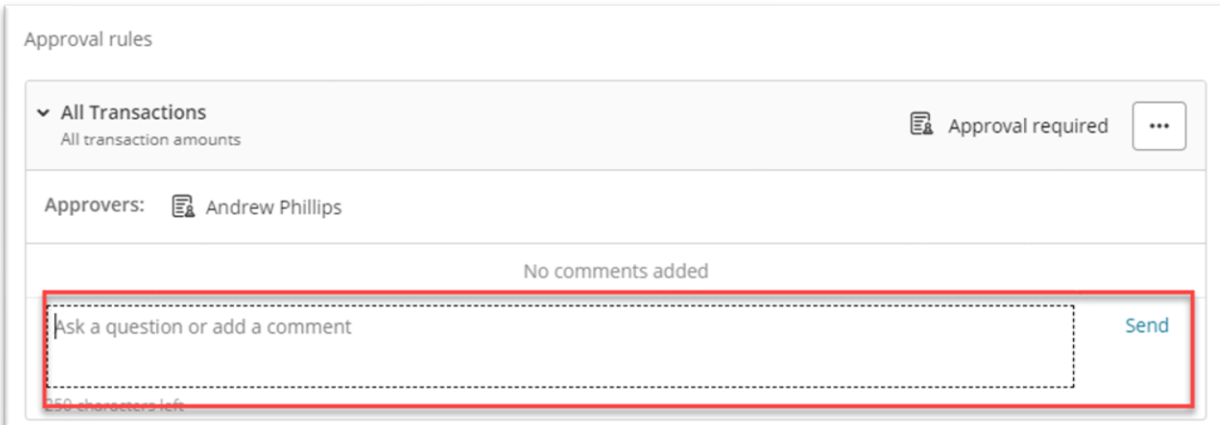
If a transaction that has been submitted for approval requires some additional attention by the cardholder, you can send a query to the cardholder requesting for additional information or to make some changes.

To query a transaction, click on the 3 dots next to the **Approval Required** notice (you may need to scroll down to see this) and then select Query from the menu.



A comment box will open allowing for the approver to enter in questions to seek more information or recommend any change(s). Once the message is ready to be sent to the cardholder click on the send button.

Depending on the notification setups for your organization, the cardholder can be informed of this query via a 'Question Posted' email notification.



Once the cardholder responds to the query the transaction will be returned with the status of Information provided and an email notification may also be sent to the approver. The approver can access this transaction from the home screen by clicking on Info Provided.

FlexiPurchase

Home Approvals Reports

✓ Approvals

16

★ Pinned

To show your favourites here, click the pin icon on a menu item.

Currently there are no items to show as you have no mapped or delegated accounts

APPROVALS

✓ Approvals

3 Employees

Approval Required

15

Info Provided

1

Info Required

0

The transaction will be flagged with a speech bubble to signify that the query has been responded to

FlexiPurchase

Home Approvals Reports

Andrew

Filter

To do • 21 Jun 2019 to 21 Jun 2021

Find

Vanessa Jones

Select all

Central City Taxi Ltd	18.50 AUD	NAB (8067)	06 Apr 2021	<div> <div> <div></div> </div> </div>	Yes	>
Cannibal Espresso	21.31 AUD	NAB (8067)	30 Apr 2021	<div> <div> <div></div> </div> </div>	Yes	>
Whitcoulls Internet Store	15.54 AUD	NAB (8067)	10 May 2021	<div> <div> <div></div> </div> </div>	Yes	>
Legato Espresso Cafe	45.07 AUD	NAB (8067)	13 May 2021	<div> <div> <div></div> </div> </div>	Yes	>
Profile Publishing	88.80 AUD	NAB (8067)	15 May 2021	<div> <div> <div></div> </div> </div>	Yes	>

Open the transaction and click on the > symbol to view the response.

Approval rules

>

All Transactions

Response received

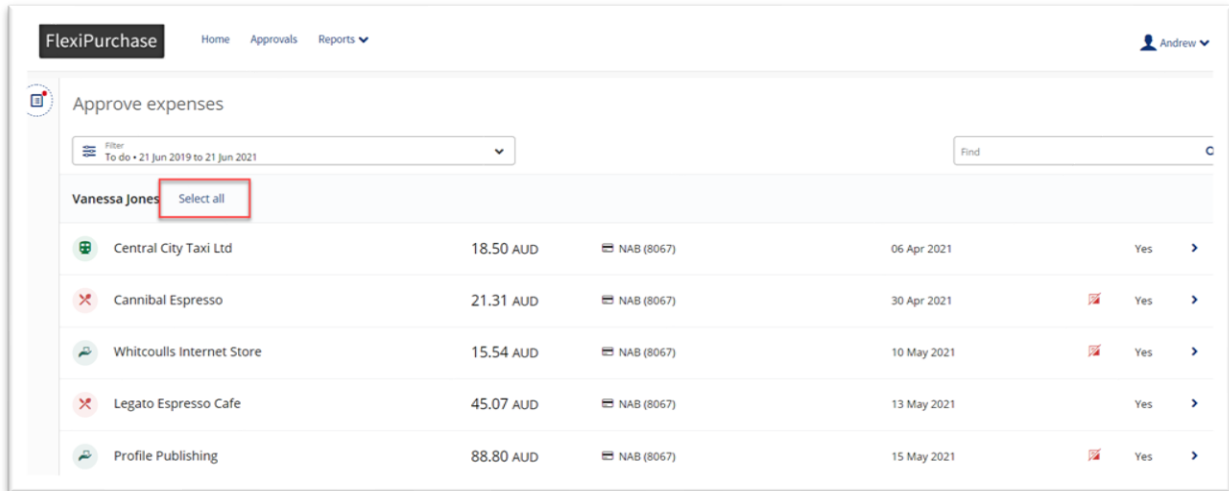
...

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Approving multiple transactions

To approve multiple transactions displayed in the [Approval Listing](#) screen, click the [Select All](#) link next to the cardholder name you want to approve.



FlexiPurchase Home Approvals Reports Andrew

Approve expenses

Filter: To do • 21 Jun 2019 to 21 Jun 2021 Find

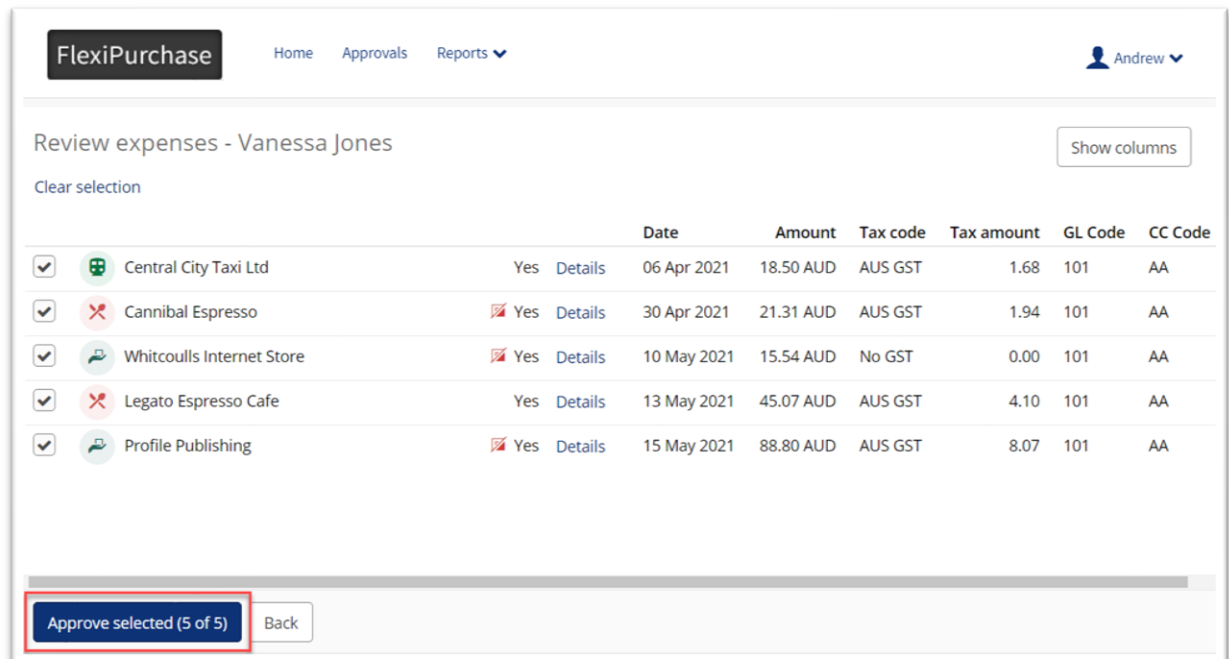
Vanessa Jones [Select all](#)

Icon	Description	Amount	Tax Code	Date	Status	Action
	Central City Taxi Ltd	18.50 AUD	NAB (8067)	06 Apr 2021	Yes	>
	Cannibal Espresso	21.31 AUD	NAB (8067)	30 Apr 2021	Yes	>
	Whitcoulls Internet Store	15.54 AUD	NAB (8067)	10 May 2021	Yes	>
	Legato Espresso Cafe	45.07 AUD	NAB (8067)	13 May 2021	Yes	>
	Profile Publishing	88.80 AUD	NAB (8067)	15 May 2021	Yes	>

Note: The Approval Listing screen will show all transactions pending approval grouped by cardholder, this will include by default any Card, Cash, or Requests. Click on the Filter drop down box to filter transactions as needed.

Approving all transactions

To approve all transactions, click on the [Approved Selected](#) link on the lower left corner. All transactions listed on this page will then be Approved.



FlexiPurchase Home Approvals Reports Andrew

Review expenses - Vanessa Jones Show columns

Clear selection

Checkbox	Icon	Description	Status	Details	Date	Amount	Tax code	Tax amount	GL Code	CC Code
<input checked="" type="checkbox"/>		Central City Taxi Ltd	Yes	Details	06 Apr 2021	18.50 AUD	AUS GST	1.68	101	AA
<input checked="" type="checkbox"/>		Cannibal Espresso	Yes	Details	30 Apr 2021	21.31 AUD	AUS GST	1.94	101	AA
<input checked="" type="checkbox"/>		Whitcoulls Internet Store	Yes	Details	10 May 2021	15.54 AUD	No GST	0.00	101	AA
<input checked="" type="checkbox"/>		Legato Espresso Cafe	Yes	Details	13 May 2021	45.07 AUD	AUS GST	4.10	101	AA
<input checked="" type="checkbox"/>		Profile Publishing	Yes	Details	15 May 2021	88.80 AUD	AUS GST	8.07	101	AA

[Approve selected \(5 of 5\)](#) [Back](#)

Approving selected transactions

To approve selected transactions, select or deselect transactions using the tick boxes on the left hand side of each transaction line link on the lower left corner. Then click on the **Approved Selected** link on the lower left corner. All selected transactions will then be Approved.

FlexiPurchase









[Home](#)
[Approvals](#)
[Reports](#)

Andrew

Review expenses - Vanessa Jones

Show columns

Clear selection

				Date	Amount	Tax code	Tax amount	GL Code	CC Code
<input checked="" type="checkbox"/>		Central City Taxi Ltd	Yes	Details	06 Apr 2021	18.50 AUD	AUS GST	1.68	101 AA
<input type="checkbox"/>		Cannibal Espresso	 Yes	Details	30 Apr 2021	21.31 AUD	AUS GST	1.94	101 AA
<input checked="" type="checkbox"/>		Whitcoulls Internet Store	 Yes	Details	10 May 2021	15.54 AUD	No GST	0.00	101 AA
<input type="checkbox"/>		Legato Espresso Cafe	Yes	Details	13 May 2021	45.07 AUD	AUS GST	4.10	101 AA
<input checked="" type="checkbox"/>		Profile Publishing	 Yes	Details	15 May 2021	88.80 AUD	AUS GST	8.07	101 AA

Approve selected (3 of 5)

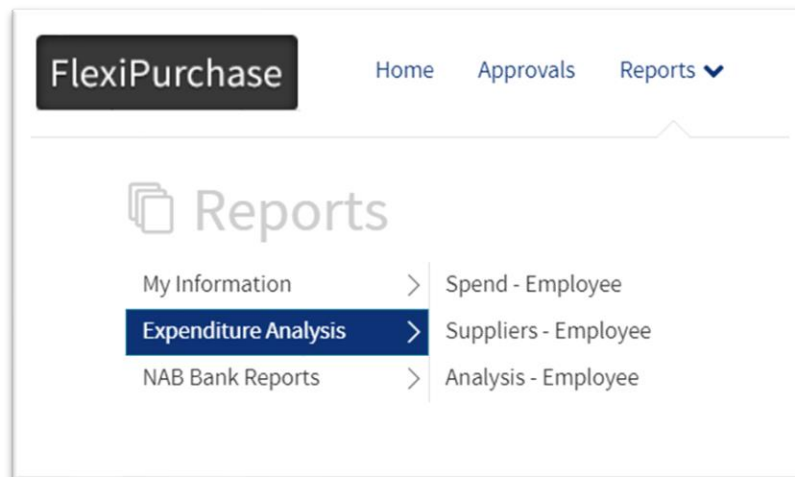
Back

Using reports

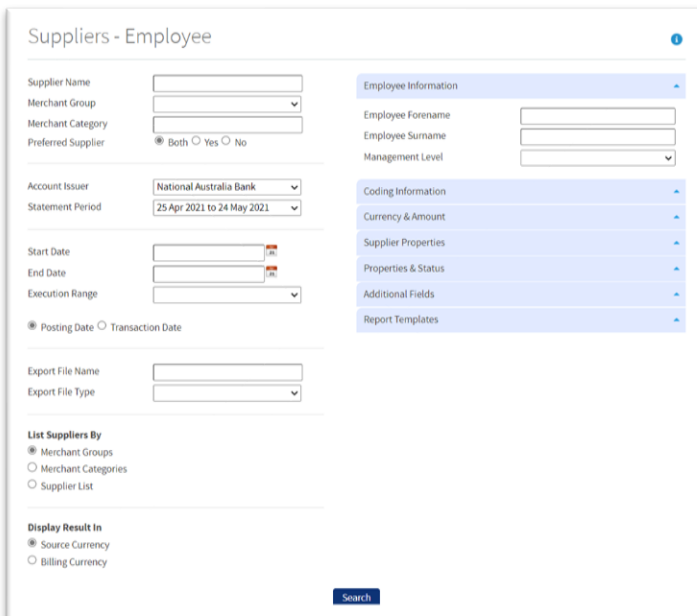
As an approver, you may be given access to a few reports to view the transactions of the employees you are an approver for.

Reports are grouped into categories, such as [My Information](#) and [Expenditure Analysis](#). The reports available to you depend on the rights assigned by your administrator.

1. In the [Reports](#) menu, select the report category, and then click the report you want (for example, *Expenditure Analysis > Suppliers - Employee*).



2. In most reports, a search window appears. In the search window, specify the criteria for your report, and click [Search](#).



Note: If you select a [Statement Period](#), the [Start Date](#) and [End Date](#) must be blank. Similarly, if the [Statement Period](#) is blank, you must enter a [Start Date](#) and [End Date](#).

3. The generated report normally displays a high-level summary of results. To display more details, click the area of interest within the report.