FlexiPurchase

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FlexiPurchase Approval Guide

Generic User Guide 2022.R2

Issue date: 4 July 2022

Contents

Introduction 3
Approver responsibilities 3
Logging in 4
Viewing transactions requiring approval 5
Actioning approvals 7
Approving multiple transactions 10
Approving all transactions 10
Approving selected transactions 11
Using reports 12

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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.

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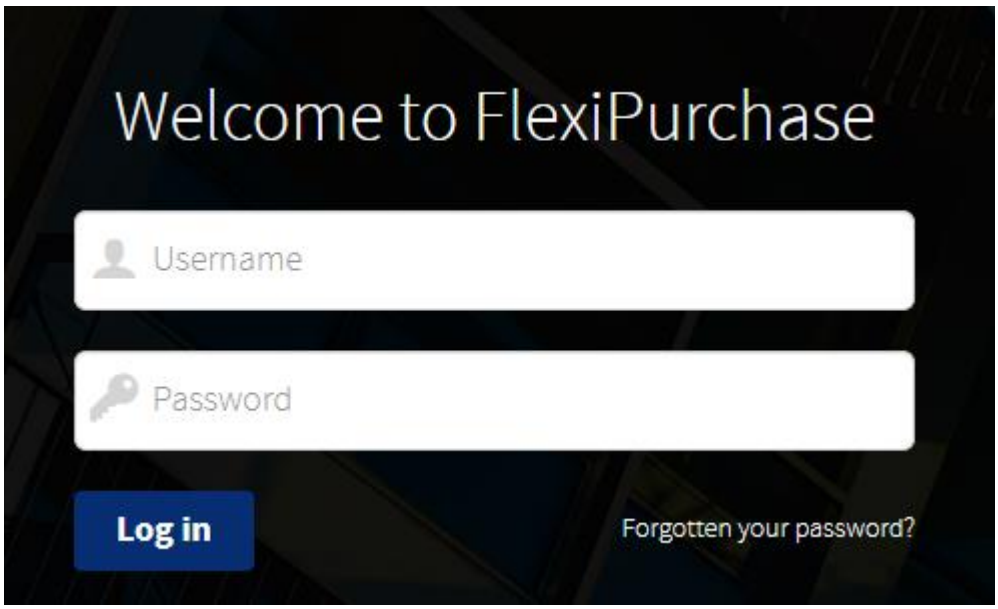
Logging in

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



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

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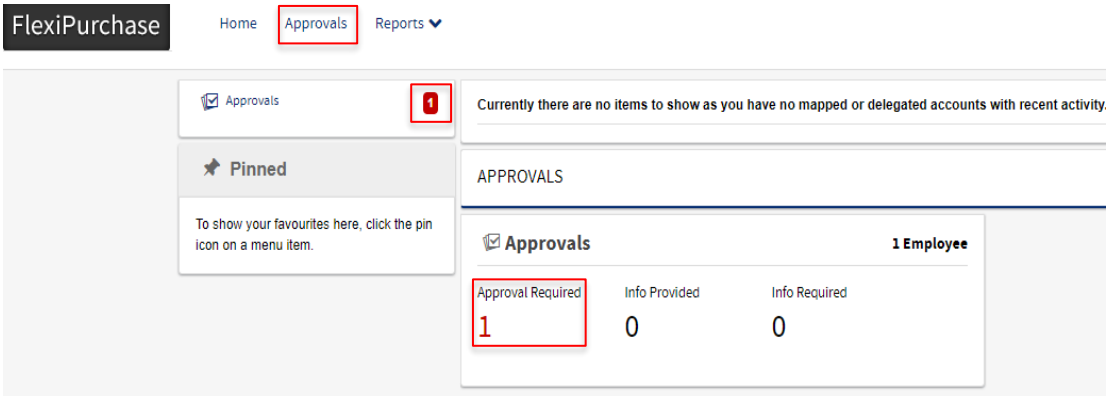
Viewing transactions requiring approval

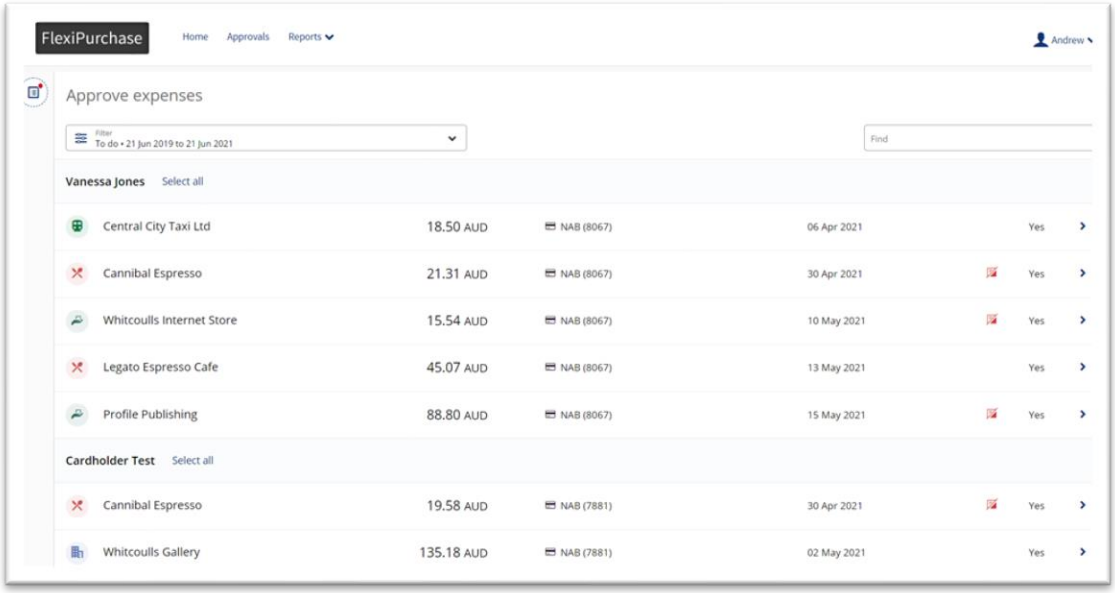
If there are transactions that require your approval, an indicator displays next to **Approvals** in the **main menu**. A count of items requiring your approval displays beside **Approvals** in the quick actions area, under the **Approvals** heading.

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.

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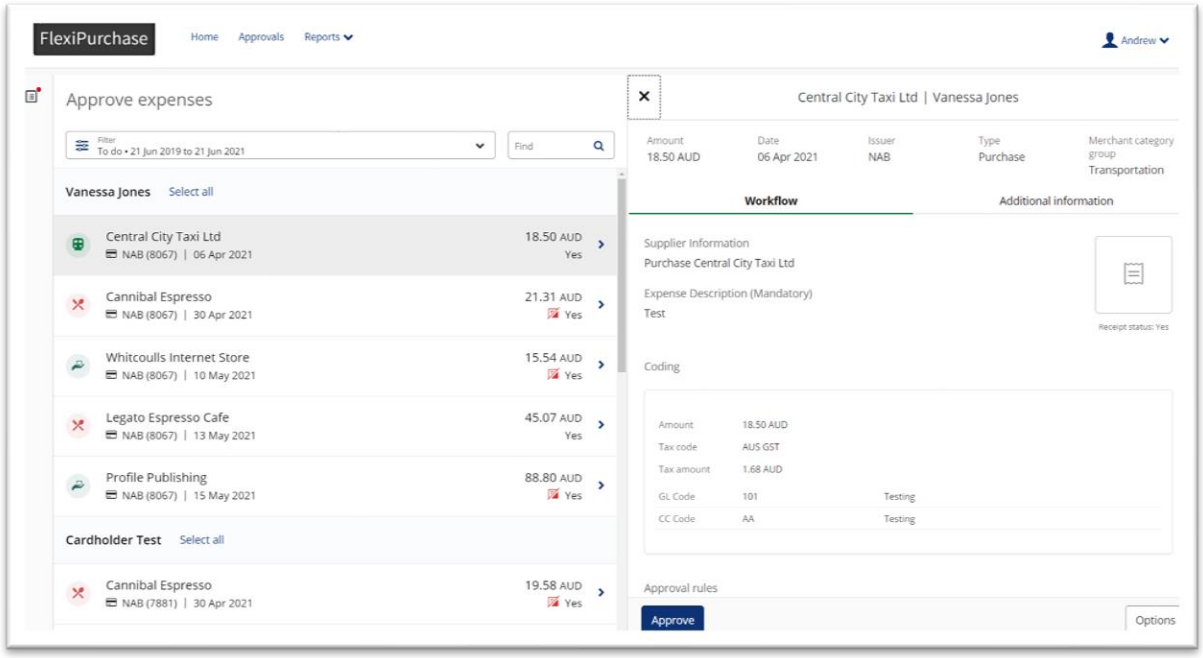

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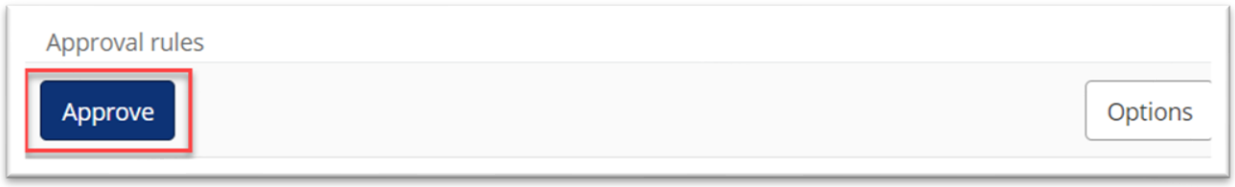
Actioning approvals

Approving

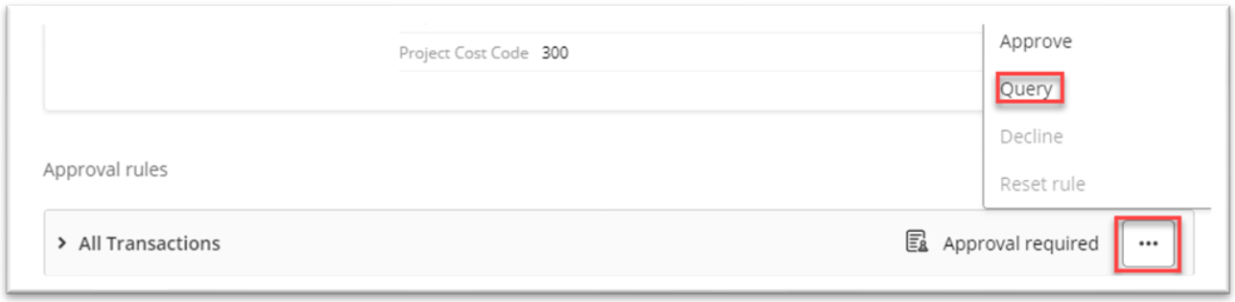
To approve a transaction, click on the approve button located at the bottom of the open transaction.



Querying a Transaction

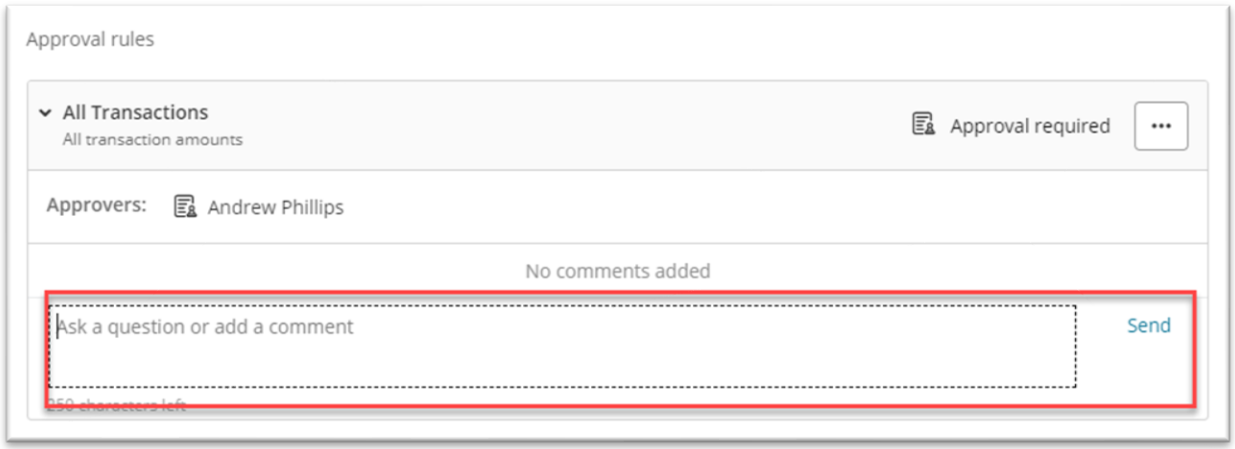
If a transaction that has been submitted for approval requires some additional attention by the cardholder, you can send a query to the cardholder requesting for additional information or to make some changes.

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.

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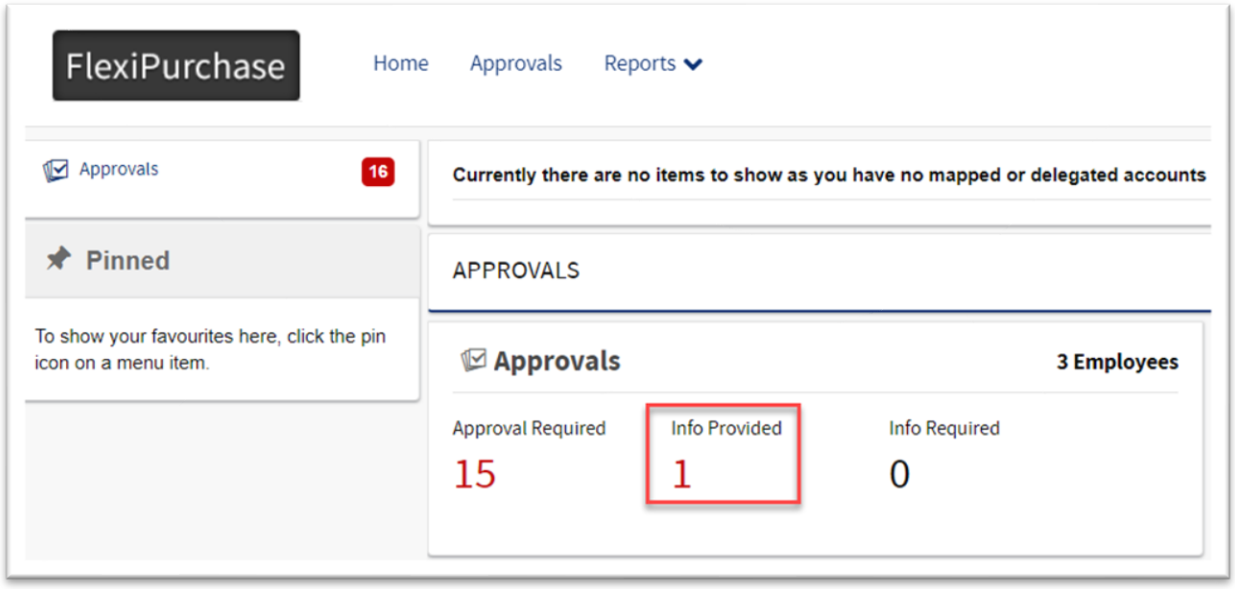
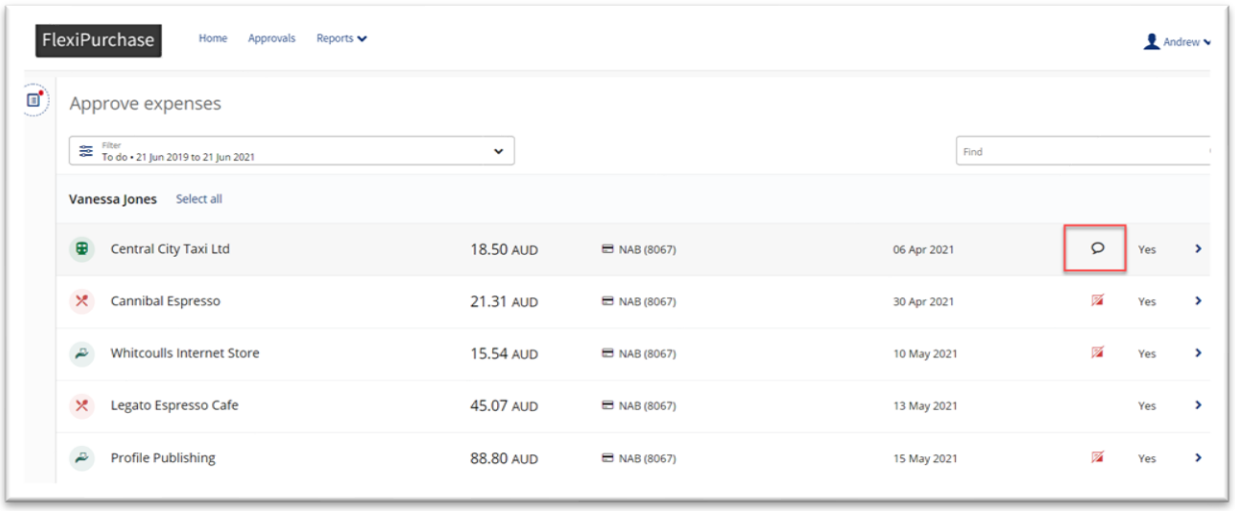
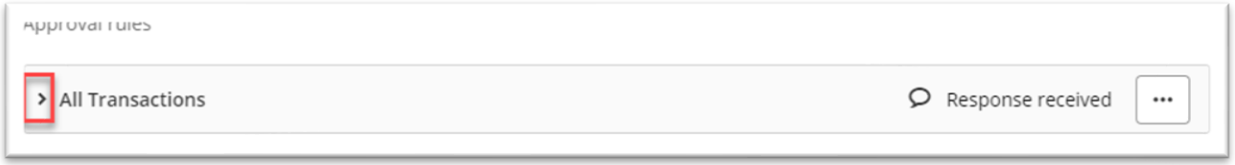


The transaction will be flagged with a speech bubble to signify that the query has been responded to



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



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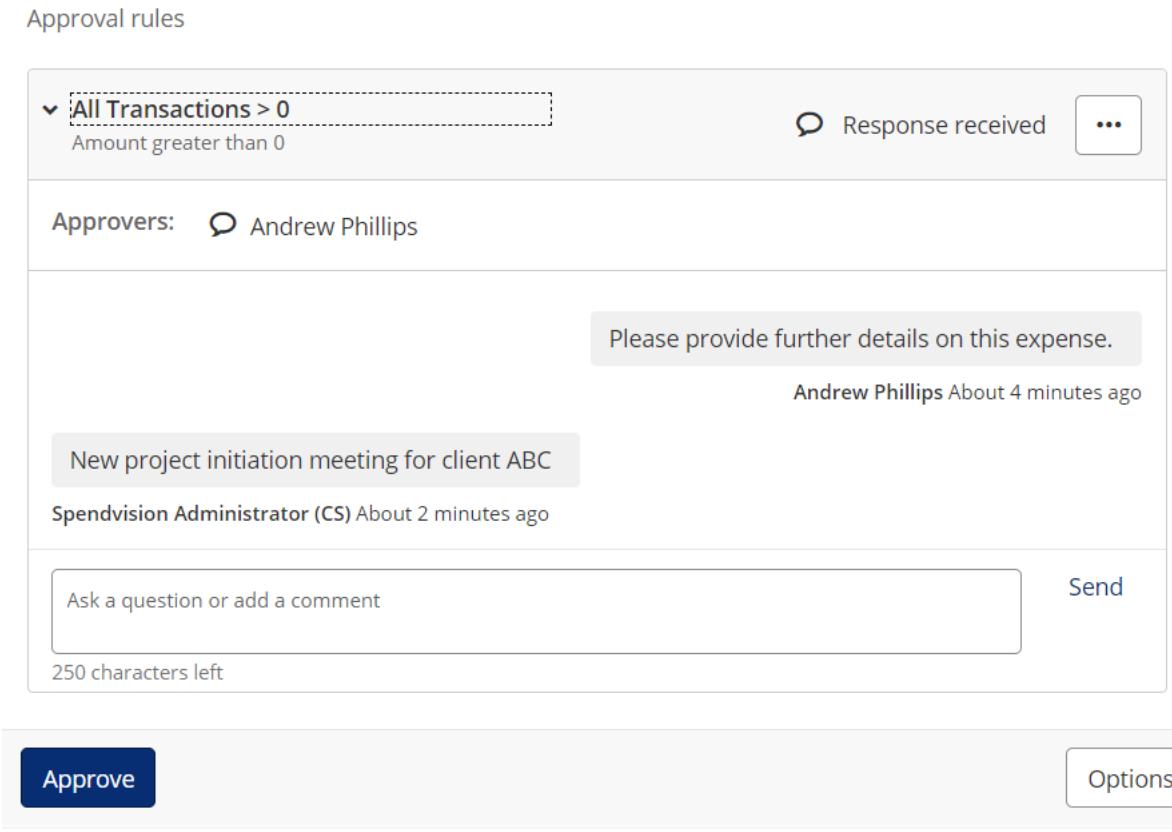

If the question has been satisfactory answered you can click on approve to complete approval. If you still require more information repeat question steps until transaction has been adequately completed by the cardholder.

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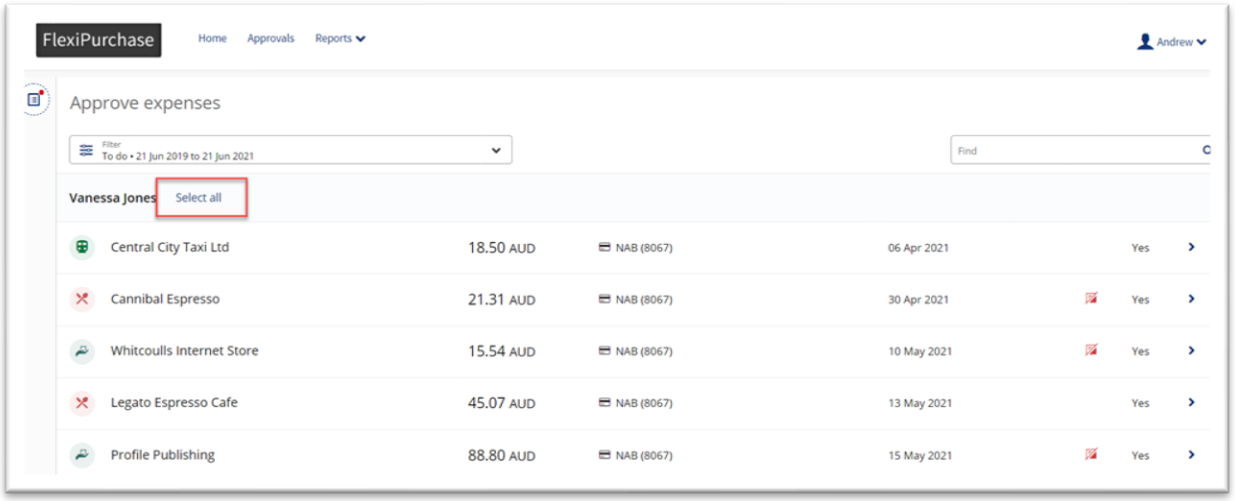
Approving multiple transactions

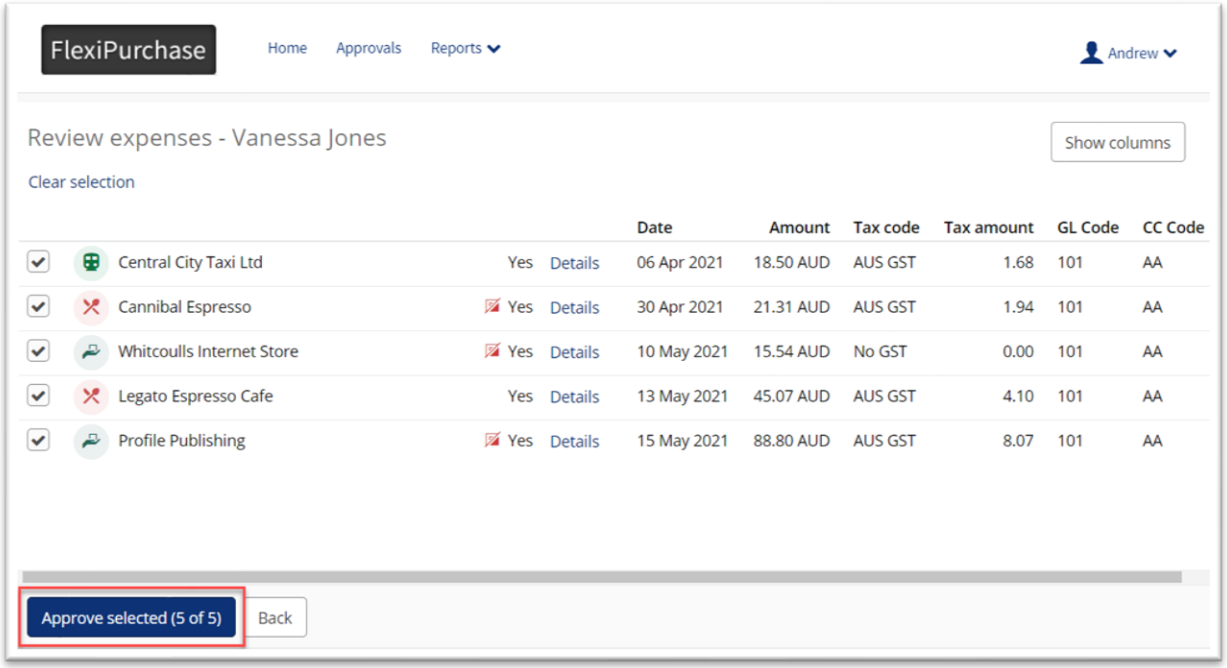
To approve multiple transactions displayed in the **Approval Listing** screen, click the **Select All** link next to the cardholder name you want to approve.



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.



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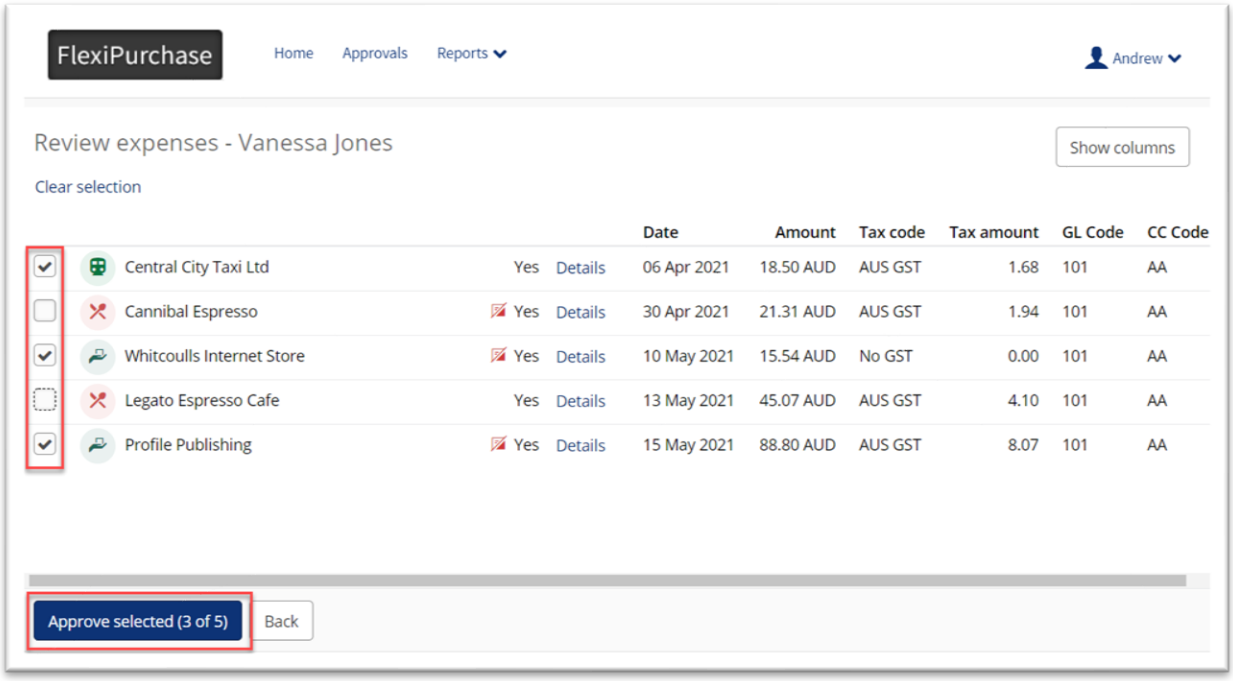
Approving selected transactions

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.



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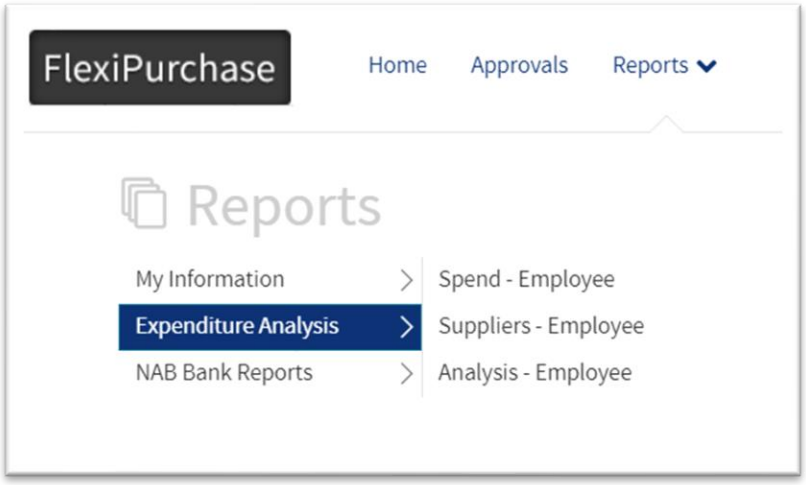
Using reports

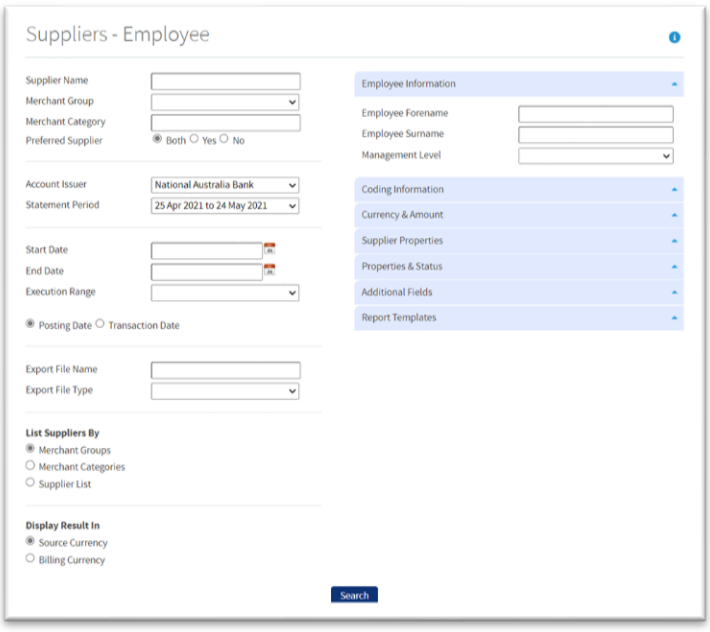
As an approver, you may be given access to a few reports to view the transactions of the employees you are an approver for.

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.

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