

Approval summary

WELLS FARGO					
Home Accounts Expenses Approvals					
Approve expenses					
Tr 60 - Card 00000000000000000000					
WF Approver 4 Test select all					
Restaurant	33.03 USD	WF Visa 3739-0081	05/26/2020	Yes	
Grocery Store	32.52 USD	WF Visa 3739-0081	05/27/2020	Yes	
WF Cardholder 3 Test select all					
Lodging	276.12 USD	WF Visa 3739-0413	05/11/2020	Yes	
Fast food Restaurant	12.40 USD	WF Visa 3739-0413	06/11/2020		
Gas Station	20.75 USD	WF Visa 3739-0413	06/17/2020		
General Business	15.25 USD	WF Visa 3739-0413	06/22/2020		
General Business	11.95 USD	WF Visa 3739-0413	06/22/2020		
Car Wash	14.00 USD	WF Visa 3739-0413	06/23/2020		
General Retail	26.50 USD	WF Visa 3739-0413	06/23/2020		
Airline	565.20 USD	WF Visa 3739-0413	06/26/2020	Yes	

To approve individual transactions click on the **Approvals** tab. Here you will see a list of the transactions requiring your approval.

Click on an expense to open it.

Approving transactions

The screenshot shows the Wells Fargo 'Approve expenses' interface. The main window displays a list of transactions for 'WF Approver 4 Test' and 'WF Cardholder 3 Test'. A modal window titled 'Lodging | WF Cardholder 3 Test' is open, showing transaction details, coding information, and an approval workflow.

Approve expenses

WF Approver 4 Test

- Restaurant: 33.03 USD
- Grocery Store: 52.52 USD

WF Cardholder 3 Test

- Lodging: 276.12 USD
- Fast Food Restaurant: 12.40 USD
- Gas Station: 20.75 USD
- General Business: 15.25 USD
- General Business: 11.95 USD
- Car Wash: 14.00 USD
- General Retail: 26.50 USD

Lodging | WF Cardholder 3 Test

Amount: 276.12 USD | Date: 05/11/2020 | Account: WF Visa 3739 | Type: Purchase | Merchant category group: Hotels

Workflow

Supplier Details: MICHIGAN LODGING

Business Purpose: No information added

Coding

Amount: 276.12 USD | Corporate Card: 148 136 | Travel Expense

Tag: Expense | Department: 206 | Marketing

Approval rules

Transaction Amount: 276.12 USD | Approval required: Yes

Approvers: WF Approver 3 Test

No comments added

Approve

When the expense window opens, you will see the expense summary at the top.

In the larger window you can see the Workflow information which includes the receipt image and Coding details.

Additional information

The screenshot displays the Wells Fargo 'Approve expenses' interface. On the left, a list of transactions is shown, categorized by approver. The 'WF Cardholder 3 Test' section is expanded, showing a list of transactions including 'Lodging', 'Fast Food (Restaurant)', 'Gas Station', 'General Business', 'Car Wash', and 'General Retail'. The 'Lodging | WF Cardholder 3 Test' transaction is selected, and a detailed view is open on the right. This view includes a table with transaction details and an 'Additional Information' tab that shows extended details like transaction date, posting date, and merchant category.

Amount	Date	Issuer	Type	Merchant category group
276.12 USD	06/11/2020	WF Visa 3739	Purchase	Hotels

Expense details	
Lodging, West Memphis, MO	
Type	Purchase
Transaction date	06/11/2020
Posting date	06/15/2020
Charge card	-
Interest date	-
Internal reference	1802021807000000

Extended transaction details	
Supplier category details	
Merchant category group	Hotels
Merchant category	Hotels (2500)

At the bottom of the detailed view, there are buttons for 'Approve' and 'Timeline'.

The **Additional Information** tab provides extended transaction details such as Transaction date and Posting date.

The **Timeline** button at the bottom right allows you to see details about the expense requesting process such as when it was created and coded.

Once you are ready to approve the transaction, click **Approve**.

Transaction query

The screenshot displays the Wells Fargo 'Approvals' interface. On the left, a list of transactions is shown under the heading 'Approve expenses'. The transactions are categorized by approver: 'WF Approver 4 Test' and 'WF Cardholder 3 Test'. The 'WF Cardholder 3 Test' section is expanded, showing a list of transactions including 'Lodging', 'Fast Food Restaurant', 'Gas Station', and 'General Business'. The 'Lodging' transaction is highlighted, showing details such as 'Amount: 276.12 USD', 'Date: 05/11/2020', 'Issuer: WF Visa 3739', 'Type: Purchase', and 'Merchant category group: Hotels'. On the right, a detailed view of the 'Lodging | WF Cardholder 3 Test' transaction is shown. This view includes a 'Workflow' section, 'Approval rules', and a 'Comments' section. A menu is open over the 'Approval rules' section, showing options: 'Approve', 'Query', 'Decline', and 'Reset rule'. The 'Query' option is highlighted. The 'Comments' section shows 'No comments added' and a text input field for adding a comment. The 'Approve' button is visible at the bottom of the transaction details.

Category	Transaction	Amount	Date	Issuer	Type	Merchant category group
WF Approver 4 Test	Restaurant	33.03 USD	05/26/2020	WF Visa 3739 (9381)	Purchase	Hotels
	Grocery Store	32.52 USD	05/27/2020	WF Visa 3739 (9381)	Purchase	Hotels
WF Cardholder 3 Test	Lodging	276.12 USD	05/11/2020	WF Visa 3739 (9415)	Purchase	Hotels
	Fast Food Restaurant	12.40 USD	06/11/2020	WF Visa 3739 (9415)	Purchase	Hotels
	Gas Station	20.75 USD	06/17/2020	WF Visa 3739 (9415)	Purchase	Hotels
	General Business	11.95 USD				

If you need additional information for a transaction, or part of the required information is missing, select **Query** from the menu button, enter a comment and select **Send**. (You can also click on an approval rule and go directly to the comments section.)

This will send the transaction back to the cardholder where they will be asked to provide more information.

Once they respond, it will reappear in your to do list.