BUTTERFIELD

Butterfield Online
Corporate User Enhanced Approvals

VERSION 1.1 | 01 JUNE 2021

# Butterfield Online Corporate User Enhanced Approvals

Bulk Authorisation: This functionality allows users to authorise all or multiple transactions at a time.

Login to Butterfield and access the view **Corporate User – Approver** from the menu (≡) option.

Click on the menu drop down located in the top left hand corner then click on the menu option **Pending Approvals**.
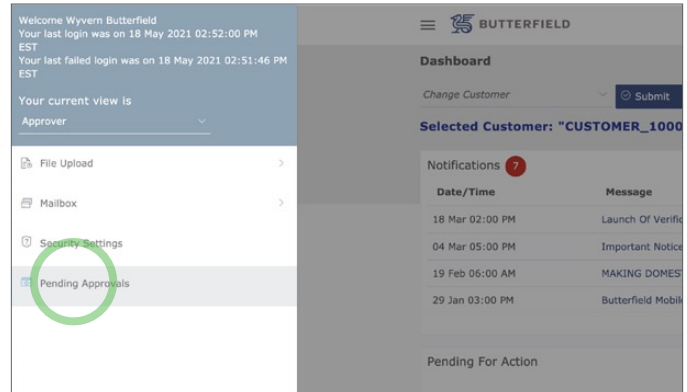

The **Pending for Approvals** section groups transactions that require an approval into three categories: **accounts**, **payments** and **bulk record**.
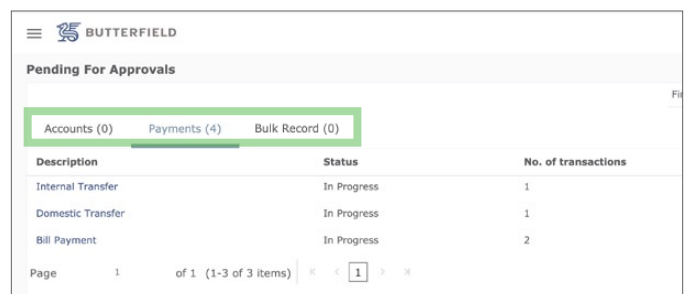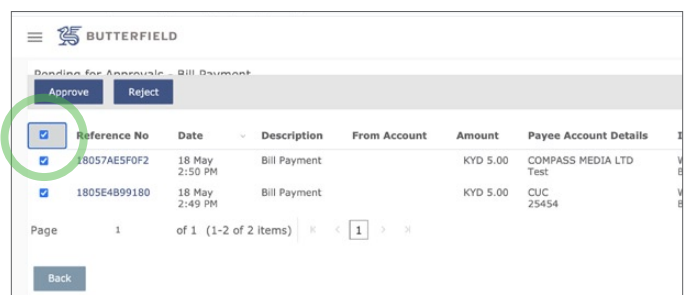

Under Payments, click on the hyperlink for transaction type (i.e. **Internal Transfer**, **Domestic Transfer**, **Bill Payment** etc.).
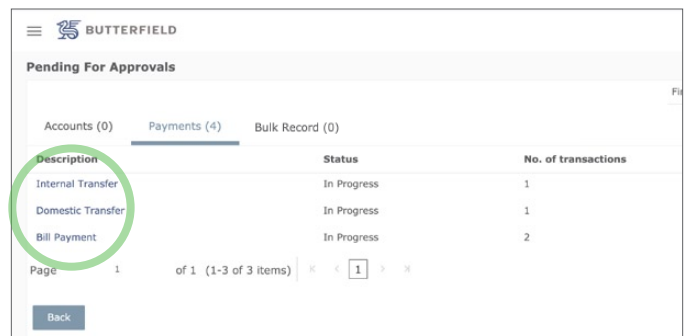
The Grace Period is applicable once the value date of a transaction pending authorisation has passed and the transaction has not been authorised. The allowed period to authorise is up until 21 days. A transaction which is not authorised within this period will automatically be rejected. Click on the hyperlink **Grace Period** to view the expiration date of the transaction.
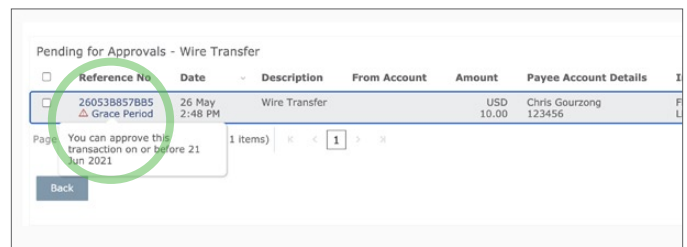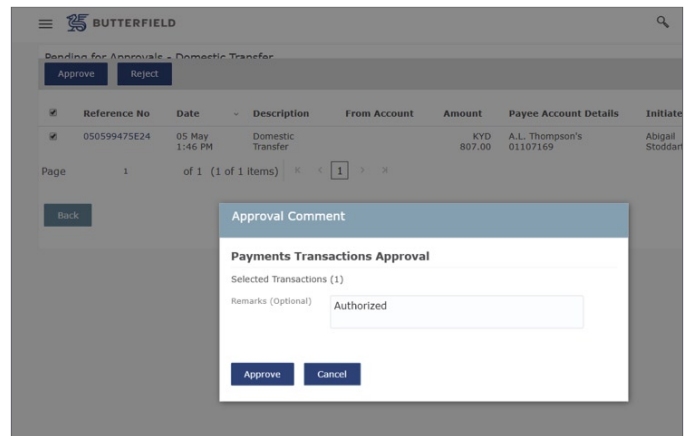

Click on the check box next to the transactions requiring authorisation or to select all by clicking on the checkbox next to the subject **Reference No.** at the top of the list.
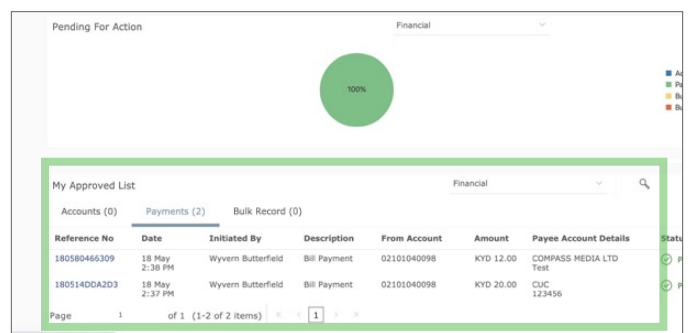
Click on **Approve** or **Reject**.

Information Classification: Public
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Enter your comments and approve or reject the transaction.


Transactions authorised or rejected by approver will be displayed in **My Approved List** queue located below **Pending for Action** on the Approver Dashboard.


Authorisation – Detailed Review: This functionality allows the user to view full transaction details and authorise or reject the selected transaction.

Access the Approver view.

Click on the menu drop down located in the top left hand corner then click on the menu option **Pending Approvals**.
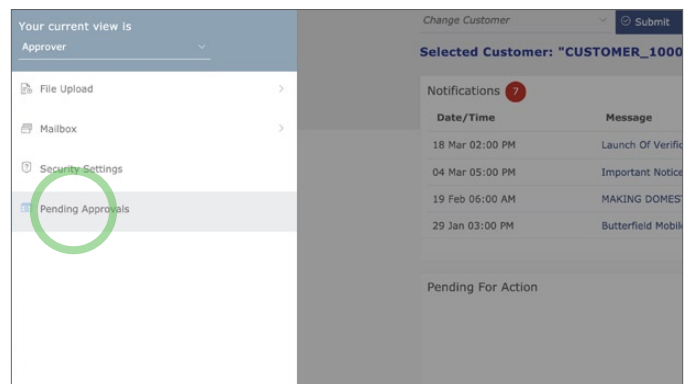
The **Pending for Approvals** section groups transactions that require an approval into three categories: **accounts**, **payments** and **bulk record**.
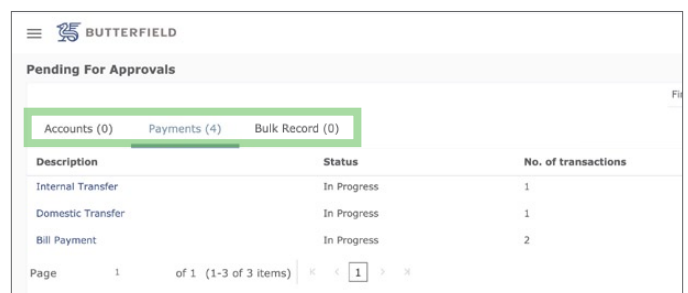
Under Payments, click on the hyperlink for transaction type (i.e. **Internal Transfer**, **Domestic Transfer**, **Bill Payment** etc.).
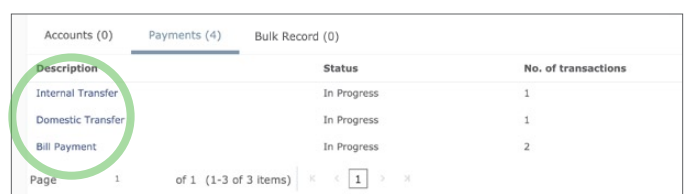
Click on the hyperlink under **Reference No**.

Full details of the transaction will be displayed, including the transaction journey detailing the User who has initiated the transaction, if any, that have already been completed.

Click on **Approve** or **Reject**.

Enter your comments and approve or reject the transaction.