



# **Butterfield Online**

Corporate User Enhanced Approvals

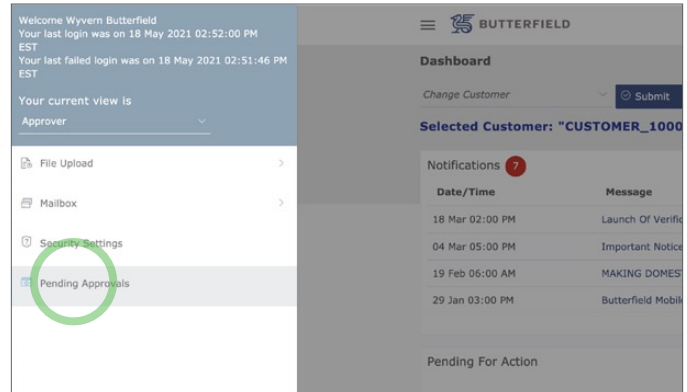
VERSION 1.1 | 01 JUNE 2021

# Butterfield Online Corporate User Enhanced Approvals

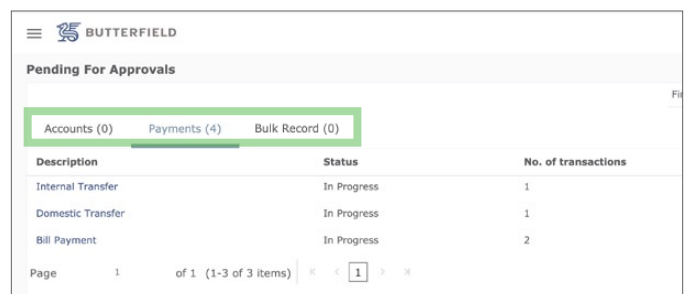
**Bulk Authorisation:** This functionality allows users to authorise all or multiple transactions at a time.

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

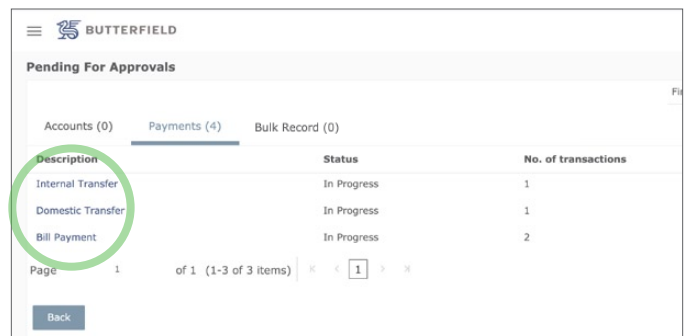
Click on the menu drop down located in the top left hand corner then click on the menu option **Pending Approvals**.



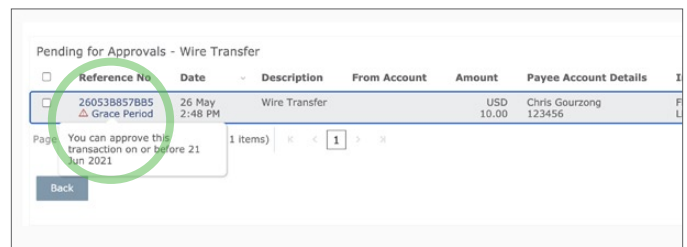
The **Pending for Approvals** section groups transactions that require an approval into three categories: **accounts**, **payments** and **bulk record**.



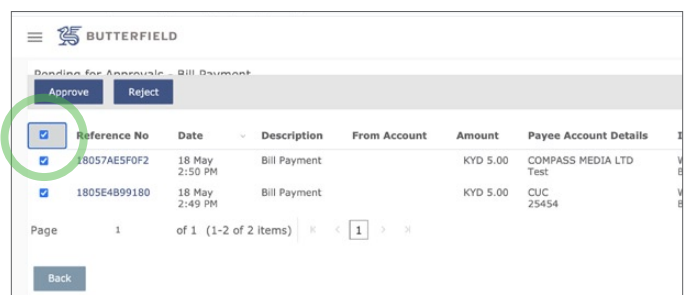
Under Payments, click on the hyperlink for transaction type (i.e. **Internal Transfer**, **Domestic Transfer**, **Bill Payment** etc.).



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.



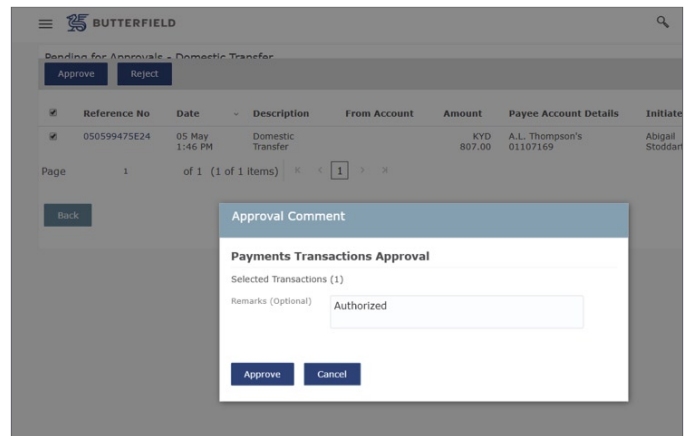
Click on the check box next to the transactions requiring authorisation or to select all by clicking on the checkbox next to the subject **Reference No.** at the top of the list.



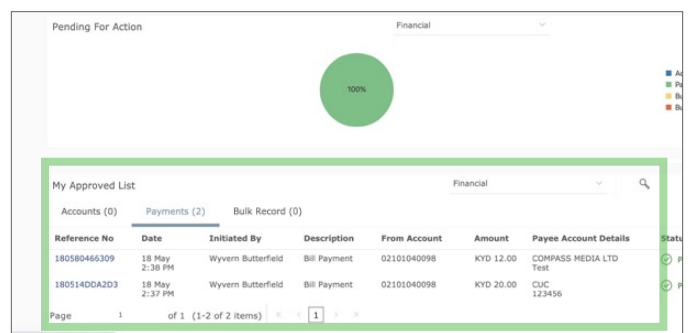
Click on **Approve** or **Reject**.



Enter your comments and approve or reject the transaction.



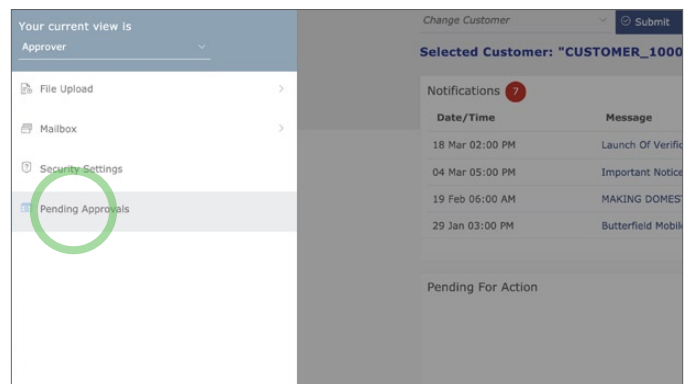
Transactions authorised or rejected by approver will be displayed in **My Approved List** queue located below **Pending for Action** on the Approver Dashboard.



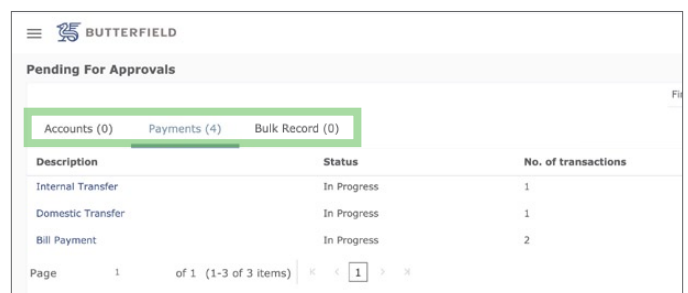
**Authorisation – Detailed Review:** This functionality allows the user to view full transaction details and authorise or reject the selected transaction.

Access the Approver view.

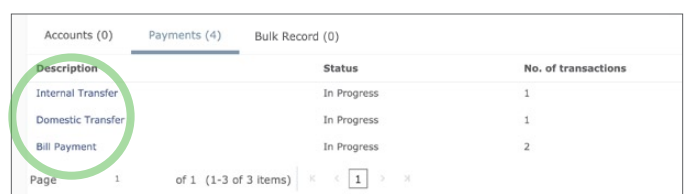
Click on the menu drop down located in the top left hand corner then click on the menu option **Pending Approvals**.



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.**

<input type="checkbox"/>	Reference No	Date	Description	From Account	Amount	Payee Account Details	
<input type="checkbox"/>	180580466309	18 May 2:38 PM	Bill Payment		KYD 12.00	COMPASS MEDIA LTD Test	
<input type="checkbox"/>	180514DDA2D3	18 May 2:37 PM	Bill Payment		KYD 20.00	CJC 123456	

Page 1 of 1 (1-2 of 2 items) < 1 >

[Back](#)

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**.

**Domestic Transfer**

[Approve](#) [Reject](#)

**Domestic Fund Transfer Details**

Transfer To  
A.L. Thompson's

Nickname  
A.L. Thompson's

Transfer Type  
DOMESTIC

Beneficiary Account Number  
01107169

Beneficiary Account Name  
A.L. Thompson's

Bank Details  
CIB  
CAYMAN NATIONAL  
GRAND CAYMAN  
GEORGE TOWN  
CIB

From Account  
0110103841700

Transfer Amount  
KYD 807.00

Beneficiary Address  
George Town  
Grand Cayman  
State  
Country

Exchange Rate  
.83333333

Converted Amount(Post application of the exchange rate)  
USD 968.40

Charges  
USD 2.40

FCPT(Applicable for Bermuda users)  
0.00

Total From Amount  
USD 970.80

Transfer When  
05 May 2021

User Reference (Optional)  
Transfer

Beneficiary Reference  
Transfer

**Transaction Journey**

Initiation Approval Completion

Abigail Stoddart  
05 May 21 14:46 PM

Enter your comments and approve or reject the transaction.

**DOMESTIC**

Beneficiary Account Number  
01107169

Beneficiary Account Name  
A.L. Thompson's

Bank Details  
CIB  
CAYMAN NATIONAL  
GRAND CAYMAN  
GEORGE TOWN  
CIB

From Account  
0110103841700

Transfer Amount  
KYD 807.00

Beneficiary Address  
George Town  
Grand Cayman  
State  
Country

Exchange Rate  
.83333333

Converted Amount(Post application of the exchange rate)  
USD 968.40

Charges  
USD 2.40

FCPT(Applicable for Bermuda users)  
0.00

Total From Amount  
USD 970.80

**Approval Comment**

**Payments Transactions Approval**

Remarks (Optional)

[Approve](#) [Cancel](#)