

QUICK TIPS

All actions require an Approval once submitted

- If an action **does not require** dual control, clicking the **Approve** button will process the action
- If an action **requires** dual control, clicking the **Approve** button gives the **first approval**, and **clicking it a second** time will process the action

Users can be entitled to submit and approve an action

- **Auto Approve** can be selected to allow a single user to submit and approve an action with one click

Single User Entitlement

Clients with a single user should ensure the following entitlements have been selected:

- ✓ View
- ✓ Manage
- ✓ Approve
- ✓ Approve Own

Granting all these entitlements will allow a single user the ability to submit and approve an action such as paying/returning an exception item, issuing/voiding checks, and placing/canceling a stop payment




Dual Control Entitlements

Clients who need dual control should ensure the following entitlements have been selected:

For the user who will be submitting an action	For the user who will be approving an action
✓ View	✓ View
✓ Manage	✓ Approve

Granting all these entitlements will allow a single user the ability to view and pay/return exceptions, issue/void checks, place/cancel stop payments and another user to view and approve.

KEY REMINDERS

-  Actions will remain in an **Entered** status until **approved**
-  Approvers should establish an **Alert** to notify them of **actions pending approval** (i.e.: Positive Pay Item Pending Approval)
-  Access the [Alert Help Card](#) for details on how to establish Alerts