

How to Address Flags in Works

1. Log in to Works and you will see Flagged Transactions on your home screen under Action Items. Click on Flagged

| Action Items | | | | Upload Rec |
|--------------|---------------|-------|-------------|----------------|
| Action | Acting As | Count | Type | Current Status |
| Resolve | Accountholder | 2 | Transaction | Flagged |

2. This will bring you to all of your Flagged transactions. Hover over the document (TXN) number and select the black drop down arrow. Then, click on View Full Details

TXN00349727 ▼

Document

TXN00349727

- Allocate / Edit
- View Full Details
- Sign Off
- Dispute
- Remove Flag
- Add to Expense Report
- Attach to Purchase Rec
- Manage Receipts
- View Receipts
- Print

3. Click on the Transaction tab

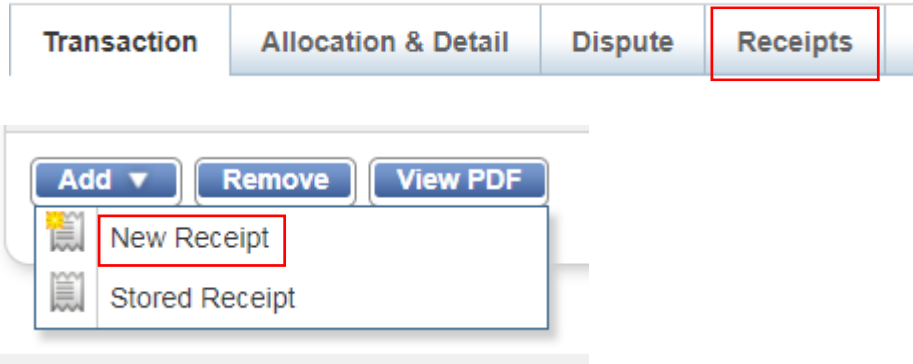
Transaction Allocation & Detail Dispute Receipts

4. You will see under Comments why the transaction was flagged and who flagged it

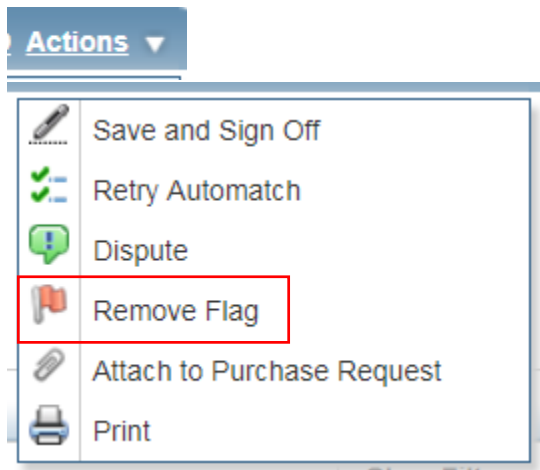
Comments

SPCC Business Meal Form required - please upload. Thank you.
LAKEN MARLEY | 09/07/2017

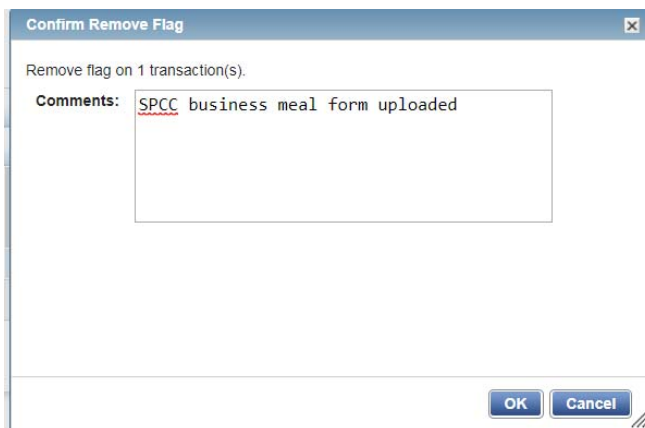
5. In this case, the SPCC Business Meal Form is required. Upload a receipt under the Receipts tab as you would upload a receipt for any transaction.



6. Once you have uploaded all supporting documentation requested, remove the flag under the Actions drop down menu



7. You will be prompted to enter a required Comment – Add a comment that addresses how you fixed the flag. Then click Ok.



8. The transaction will then be removed from your Flagged items