



PLATFORM FEATURES

Making approvals

How to approve payments
and beneficiaries

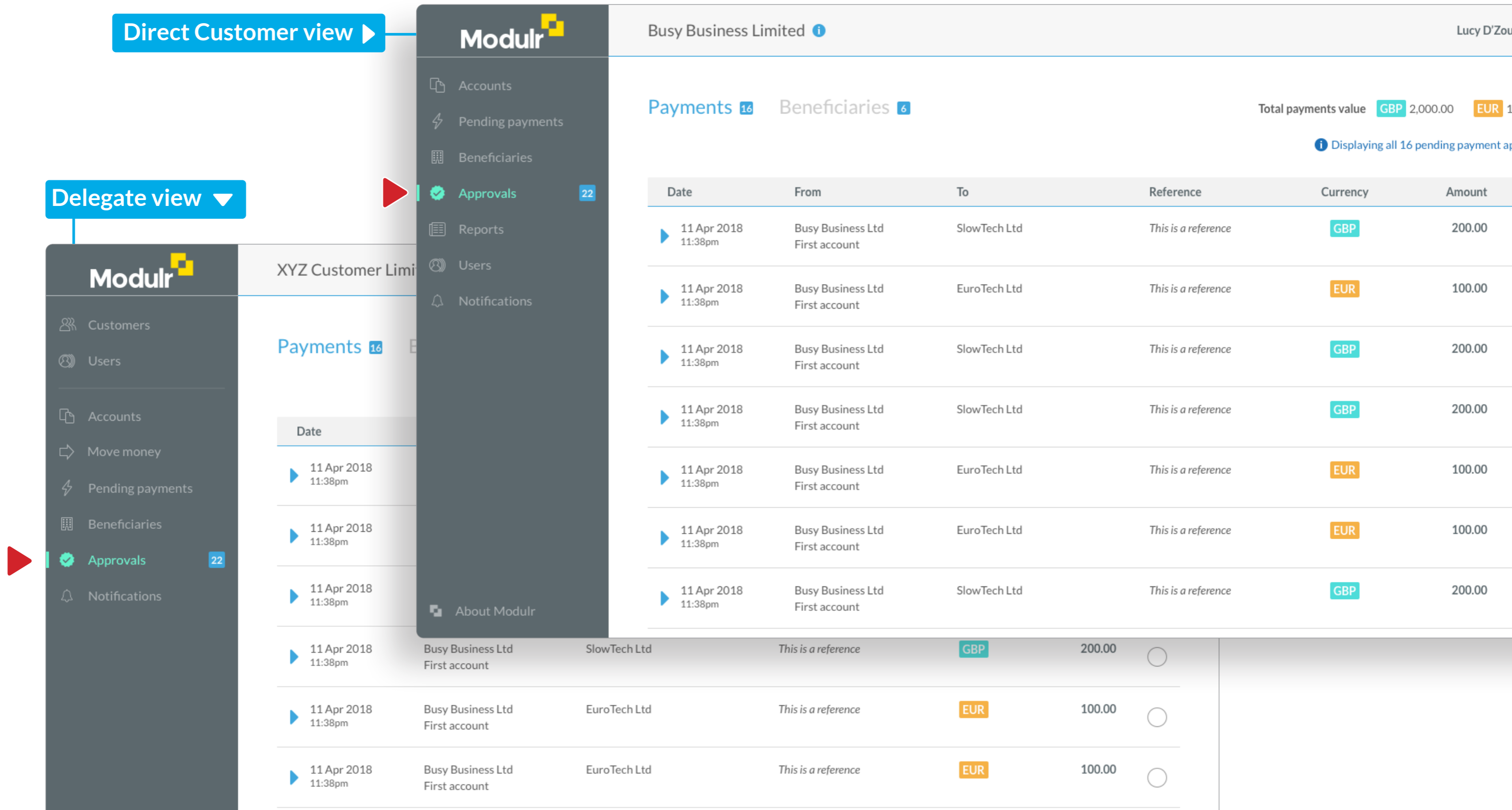


Viewing approvals

Payments and Beneficiaries that are waiting to be approved can be found by selecting the Approvals option in the side menu.

Only users with the Approvals permission will see this option.

If you are a Delegate user, you'll find the Approvals option in the menu when you select a customer on the Customers page.



The screenshot illustrates the 'Approvals' section in the Modulr interface. It is divided into two views: 'Direct Customer view' and 'Delegate view'.

Direct Customer view: Shows the 'Approvals' menu item with a notification badge of 22. The main content area displays 'Busy Business Limited' with 16 pending payments and 6 beneficiaries. A table lists these payments with columns for Date, From, To, Reference, Currency, and Amount.

Delegate view: Shows the 'Approvals' menu item with a notification badge of 22. The main content area displays 'XYZ Customer Limited' with 16 pending payments. A table lists these payments with columns for Date, From, To, Reference, Currency, Amount, and a status indicator (radio button).

Date	From	To	Reference	Currency	Amount
11 Apr 2018 11:38pm	Busy Business Ltd First account	SlowTech Ltd	This is a reference	GBP	200.00
11 Apr 2018 11:38pm	Busy Business Ltd First account	EuroTech Ltd	This is a reference	EUR	100.00
11 Apr 2018 11:38pm	Busy Business Ltd First account	SlowTech Ltd	This is a reference	GBP	200.00
11 Apr 2018 11:38pm	Busy Business Ltd First account	SlowTech Ltd	This is a reference	GBP	200.00
11 Apr 2018 11:38pm	Busy Business Ltd First account	EuroTech Ltd	This is a reference	EUR	100.00
11 Apr 2018 11:38pm	Busy Business Ltd First account	EuroTech Ltd	This is a reference	EUR	100.00
11 Apr 2018 11:38pm	Busy Business Ltd First account	SlowTech Ltd	This is a reference	GBP	200.00

Date	From	To	Reference	Currency	Amount	Status
11 Apr 2018 11:38pm	Busy Business Ltd First account	SlowTech Ltd	This is a reference	GBP	200.00	<input type="radio"/>
11 Apr 2018 11:38pm	Busy Business Ltd First account	EuroTech Ltd	This is a reference	EUR	100.00	<input type="radio"/>
11 Apr 2018 11:38pm	Busy Business Ltd First account	EuroTech Ltd	This is a reference	EUR	100.00	<input type="radio"/>

Select payments to approve

Select each payment to approve by checking the circle on the right hand end of each row in the approvals table. An action bar appears at the bottom of the screen showing what has been selected and the actions available.

Modulr

Busy Business Limited ⓘ

Lucy D'Zouza 👤

Payments 46 **Beneficiaries** 6

Total payments value **GBP** 2,000.00 **EUR** 1,000.00

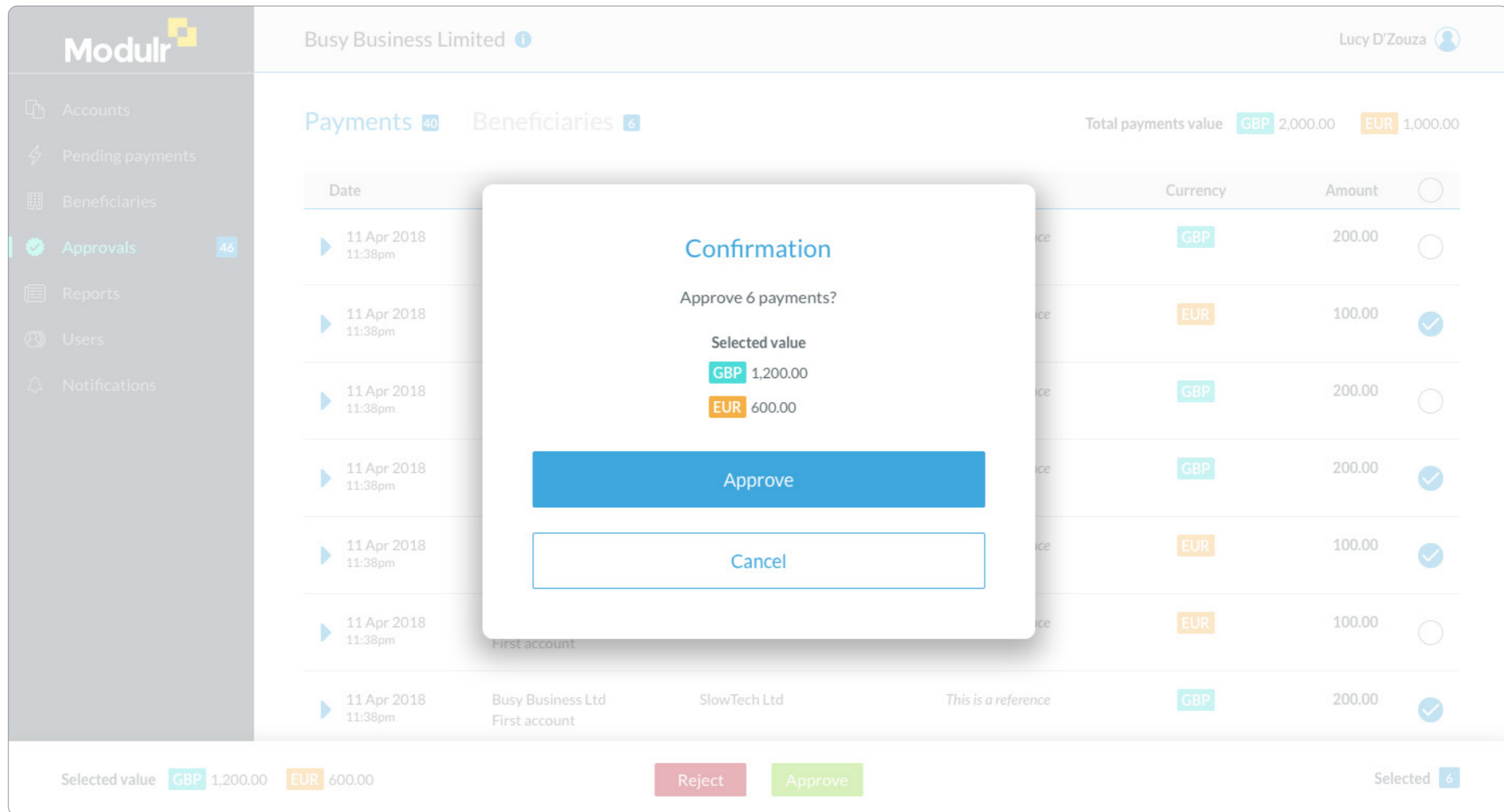
Date	From	To	Reference	Currency	Amount	
▶ 11 Apr 2018 11:38pm	Busy Business Ltd First account	SlowTech Ltd	<i>This is a reference</i>	GBP	200.00	<input type="radio"/>
▶ 11 Apr 2018 11:38pm	Busy Business Ltd First account	EuroTech Ltd	<i>This is a reference</i>	EUR	100.00	<input checked="" type="radio"/>
▶ 11 Apr 2018 11:38pm	Busy Business Ltd First account	SlowTech Ltd	<i>This is a reference</i>	GBP	200.00	<input type="radio"/>
▶ 11 Apr 2018 11:38pm	Busy Business Ltd First account	SlowTech Ltd	<i>This is a reference</i>	GBP	200.00	<input checked="" type="radio"/>
▶ 11 Apr 2018 11:38pm	Busy Business Ltd First account	EuroTech Ltd	<i>This is a reference</i>	EUR	100.00	<input checked="" type="radio"/>
▶ 11 Apr 2018 11:38pm	Busy Business Ltd First account	EuroTech Ltd	<i>This is a reference</i>	EUR	100.00	<input type="radio"/>
▶ 11 Apr 2018 11:38pm	Busy Business Ltd First account	SlowTech Ltd	<i>This is a reference</i>	GBP	200.00	<input checked="" type="radio"/>

Selected value **GBP** 1,200.00 **EUR** 600.00

Reject **Approve**

Selected 6

Selecting Approve from the action bar presents the user with a confirmation summary of the payments to be approved.



Modulr Busy Business Limited 1 Lucy D'Zouza 👤

Payments 40 Beneficiaries 6 Total payments value GBP 2,000.00 EUR 1,000.00

Date	Currency	Amount	
▶ 11 Apr 2018 11:38pm	GBP	200.00	<input type="radio"/>
▶ 11 Apr 2018 11:38pm	EUR	100.00	<input checked="" type="radio"/>
▶ 11 Apr 2018 11:38pm	GBP	200.00	<input type="radio"/>
▶ 11 Apr 2018 11:38pm	GBP	200.00	<input checked="" type="radio"/>
▶ 11 Apr 2018 11:38pm	EUR	100.00	<input checked="" type="radio"/>
▶ 11 Apr 2018 11:38pm	EUR	100.00	<input type="radio"/>
▶ 11 Apr 2018 11:38pm	GBP	200.00	<input checked="" type="radio"/>

Confirmation

Approve 6 payments?

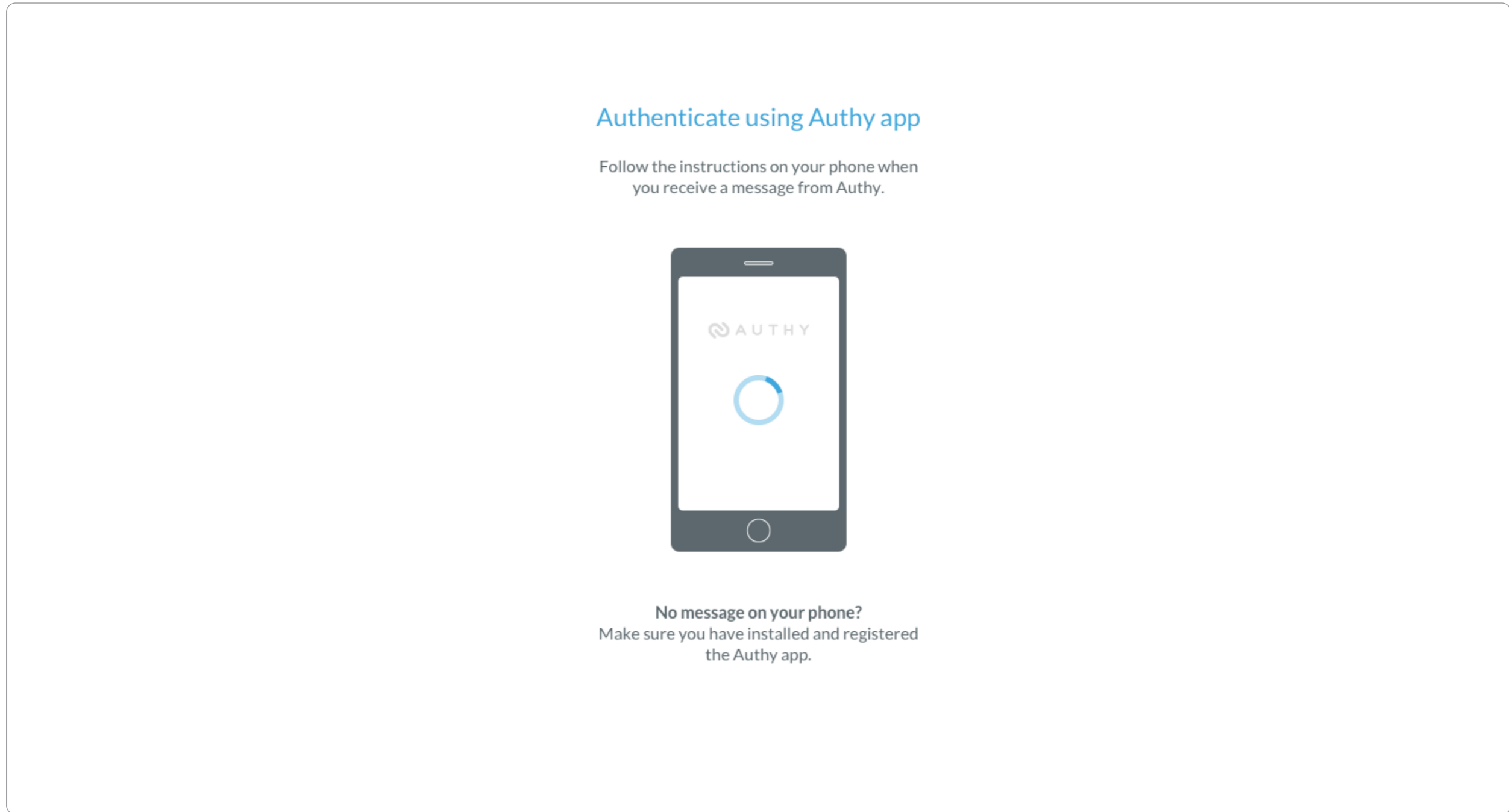
Selected value

GBP 1,200.00

EUR 600.00

Selected value GBP 1,200.00 EUR 600.00 Selected 6

Selecting Approve on the confirmation screen triggers the request to Authy.
As the request is being made to Authy, the user sees a loading screen.



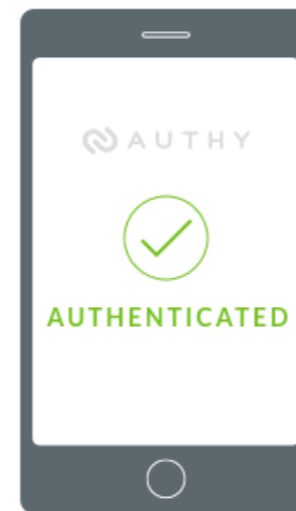
The user will receive a message on their phone that has Authy installed prompting for a selection



Once the user selects 'Approve' on their Authy app, the portal screen transitions to a success message.

Authenticate using Authy app

Follow the instructions on your phone when you receive a message from Authy.



No message on your phone?
Make sure you have installed and registered the Authy app.

The portal screen then transitions back to the approvals page, minus the approved payments, and a message that the approval has been successful. The process is the same for approving Beneficiaries.

✔ 6 PAYMENTS APPROVED

Accounts
Pending payments
Beneficiaries
Approvals 40
Reports
Users
Notifications

Payments 40 Beneficiaries 6

Total payments value **GBP** 800.00 **EUR** 400.00

Date	From	To	Reference	Currency	Amount	
▶ 11 Apr 2018 11:38pm	Busy Business Ltd First account	SlowTech Ltd	<i>This is a reference</i>	GBP	200.00	<input type="radio"/>
▶ 11 Apr 2018 11:38pm	Busy Business Ltd First account	EuroTech Ltd	<i>This is a reference</i>	EUR	100.00	<input type="radio"/>
▶ 11 Apr 2018 11:38pm	Busy Business Ltd First account	SlowTech Ltd	<i>This is a reference</i>	GBP	200.00	<input type="radio"/>
▶ 11 Apr 2018 11:38pm	Busy Business Ltd First account	SlowTech Ltd	<i>This is a reference</i>	GBP	400.00	<input type="radio"/>
▶ 11 Apr 2018 11:38pm	Busy Business Ltd First account	EuroTech Ltd	<i>This is a reference</i>	EUR	300.00	<input type="radio"/>

About Modulr

