Reviewing a Transaction

If you are assigned a Cardholder role, you can review transactions within your Hierarchy ID and scope. Using multi-select, you can review up to 100 transactions at the same time.

Note: Although you can select up to 100 individual records on the page to review, the total number of records you can select is dependent on the number of records displayed. In the My Profile section of PaymentNet, you can choose to display 20, 50, or 100 records on a page at a time. To change the number of records that display, see Setting Up Screen Views.

To review a transaction:

1. Select Transactions > Manage.
2. On the Transaction List, do one of the following:
   - Click the transaction you want to review.
   - Use the multi-select tool to select the transactions you want to review and then click the Reviewed button. For information about multi-select, see Using Multi-Select.

Note: To review multiple transactions at the same time, the transactions must be in a hierarchy to which you have a scope of view.

   If you select multiple transactions in the list and any are in a hierarchy to which you do not have the correct scope of view, the Reviewed button will be unavailable.

3. Review the transaction to make necessary changes.
4. Select the Reviewed checkbox on the Transaction Detail: General Information tab.
5. Click Save.

   The transaction will be marked as reviewed and, if applicable, forwarded to the appropriate approver.