# How to Flag / Remove a Flag from a Transaction or Request

"Flagging" a Transaction or Request is the term used to indicate that a transaction or request is either missing something or needs further information before it can be approved or processed. An Approver or AFS Finance may Flag an item when they find that a wrong code has been used, they can't read the receipt that was uploaded, or they just need further information to back up the request. When an item is Flagged, it then becomes available to the user or cardholder to then edit. The act of Flagging an item will send the user/cardholder an email notifying them it was flagged and the act of removing the flag will send an email back to the approver or Finance to let them know it was done.

If the issue is that the user just used the wrong code and the correct code is obvious to you, you may choose to just correct the code yourself. However, if something else is needed from the user in order to continue with the approval, you should flag it.

To Flag an item: (Approvers/Finance)

1. From the "Pending Sign Off" tab where you are reviewing all the items needing your approval, click on the Document TXN# or RCPT# to open the dropdown box of choices.
2. Then click on "Raise Flag"
3. Enter the reason you are flagging it in the comments box and click OK.
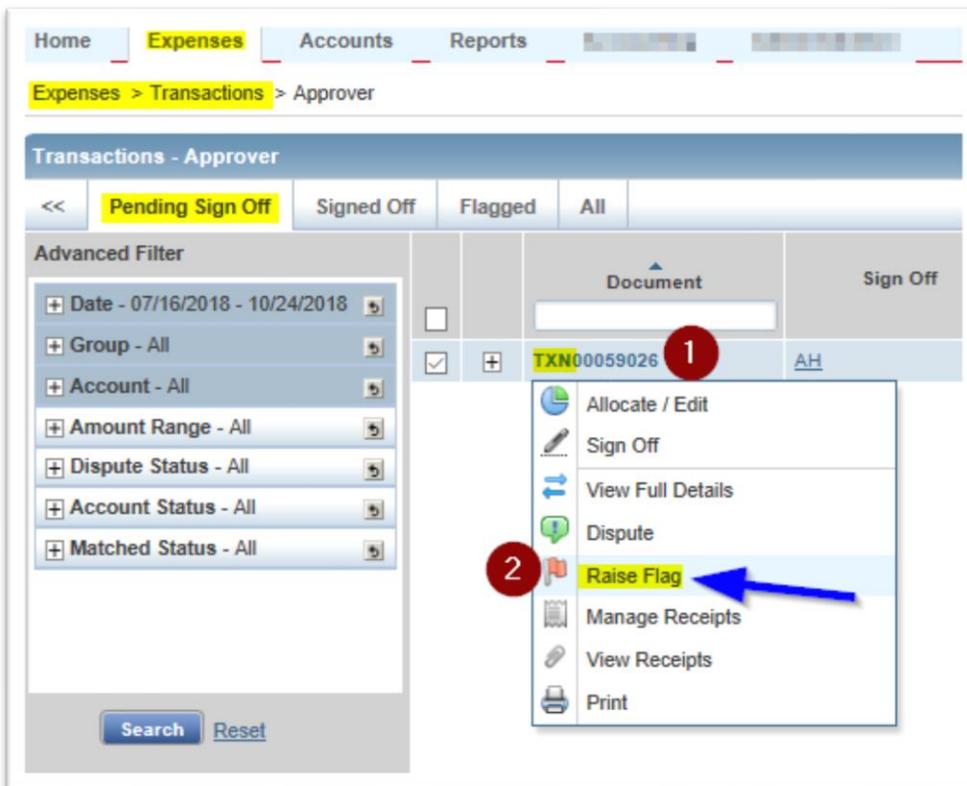
To Remove a Flag: (User/Cardholder)

1. From the "Flagged" tab under Expenses > Transactions > [Accountholder] OR Expenses > Reimbursements > [Accountholder]
2. After making the correction to the item, click on the Document TXN# or RCPT# to open the dropdown box of choices.
3. Then click on "Remove Flag".
4. Enter some comments of what was done/corrected into the comments box and click OK.

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