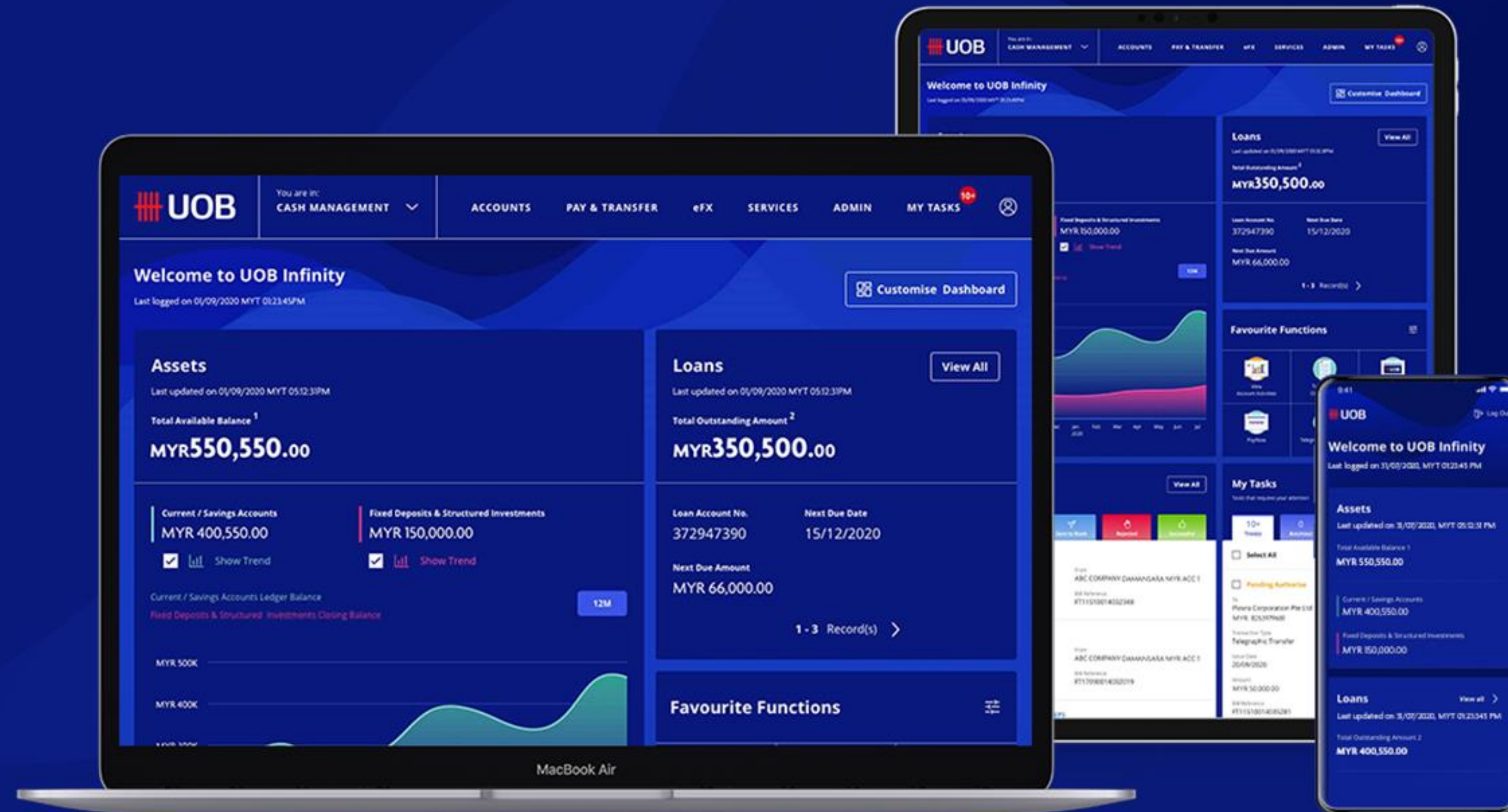


INFINITY User Guide



Approval Status

Approval Status

Overview

- 1** How to Access Approval Status
- 2** An Overview of Approval Status
- 3** How to View Transaction Details
- 4** How to View the Audit Trail
- 5** How to Approve Your Transaction via Approval Status
- 6** How to Return the Transaction to Maker
- 7** How to Delete Transaction
- 8** How to Edit Pending Transaction

1. How to Access Approval Status

How to Access Approval Status

UOB

The Different Entry Points

- Entry point 1

Hover over “Accounts” on the navigation bar and select “Approval Status” (under “Status”).
- Entry point 2

Under Dashboard’s Approval Status widget, tap onto “View All”.
- Entry point 3

Under Dashboard’s Approval Status widget, tap onto “View All Transactions”.

Global Menu (Expanded View)

UOB

You are in: CASH MANAGEMENT

ACCOUNTS

PAY & TRANSFER

SERVICES

ADMIN

MY TASKS

ACCOUNTS

FIXED DEPOSITS

STATUS

DDA

Accounts Overview

Place Fixed Deposits (FD/FD-i)

Approval Status

DDA Inquiry

Total Available Balance¹

MYR 1,312,651,352,866.72

Current Accounts / Current Accounts-i & Savings Accounts

MYR 1,312,651,352,866.72

☒ Show Trend

Fixed Deposits / Fixed Deposits-i & Structured Investment Accounts

N/A

☒ Show Trend

Current Accounts / Current Accounts-i & Savings Accounts Ledger Balance

Fixed Deposits / Fixed Deposits-i & Structured Investment Accounts Closing Balance

MYR 1.5T

MYR 1T

MYR 500B

MYR 0

Nov 2020

Dec

Jan 2021

Feb

Mar

Apr

May

Jun

Jul

Aug

Sep

Oct

My Tasks

Tasks that require your attention

5 Tran(s)

0 Batch(es)

0 Service(s)

0 Admin

☐ Select All

☐ Pending

To

From

Transaction Type

Bulk Upload Payment Interbank GIRO (IBG)

Transaction / Value Date

15/09/2021

Amount

MYR 5,300.00

Bank Reference

BK21090000421952

Processing: Send EIS Contribution File

To

From

Value / Placement Date

N/A

Bank Reference

SE21090000426839

Pending Authorise: FPX

To

From

Value / Placement Date

21/09/2021

Amount

MYR 36.00

Bank Reference

FT21090000425532

Pending: EPF Payment (Employee)

To

From

Value / Placement Date

21/09/2021

Amount

MYR 8.45

Bank Reference

BK21090000425812

Pending: Bulk Upload Payroll (AFT Employee)

To

From

Value / Placement Date

18/09/2021

Amount

MYR 303.44

Bank Reference

BK21090000423519

Successful: Fixed Deposit (FD/FD-i) Placement

To

From

Value / Placement Date

17/09/2021

Amount

MYR 67,000.00

Bank Reference

TD21090000423438

View All Transactions

Approval Status Default View

Approval Status

Your transactions in the past 2 months

View All

5 Tran(s)

0 Batch(es)

0 Service(s)

0 Admin

Processing: Send EIS Contribution File

To

From

Value / Placement Date

N/A

Bank Reference

SE21090000426839

Pending Authorise: FPX

To

From

Value / Placement Date

21/09/2021

Amount

MYR 36.00

Bank Reference

FT21090000425532

Pending: EPF Payment (Employee)

To

From

Value / Placement Date

21/09/2021

Amount

MYR 8.45

Bank Reference

BK21090000425812

Pending: Bulk Upload Payroll (AFT Employee)

To

From

Value / Placement Date

18/09/2021

Amount

MYR 303.44

Bank Reference

BK21090000423519

Successful: Fixed Deposit (FD/FD-i) Placement

To

From

Value / Placement Date

17/09/2021

Amount

MYR 67,000.00

Bank Reference

TD21090000423438

View All Transactions

My Tasks

Tasks that require your attention

☐ Select All

☐ Pending

To

From

Transaction Type

Bulk Upload Payment Interbank GIRO (IBG)

Transaction / Value Date

15/09/2021

Amount

MYR 5,300.00

Bank Reference

BK21090000421952

Pending

To

From

Transaction Type

Transaction / Value Date

15/09/2021

Amount

MYR 165.30

Bank Reference

BK21090000422016

Pending

To

From

Transaction Type

Transaction / Value Date

15/09/2021

Amount

MYR 221.00

Bank Reference

BK21090000422090

Pending

To

From

Transaction Type

Transaction / Value Date

Amount

Bank Reference

2 RECORDS

NUSMETRO LAND

RESTRICTED

5

2. An Overview of Approval Status

Overview of Approval Status

Quick Guide

1. **Tabs Toggle**
Click on the tabs to toggle between “All”, “Pending”, “Sent to Bank”, “Rejected” and “Successful” transaction status. The explanation of each status will be explained in the next page.
2. **Filter Options**
You can customise the table’s content to suit your viewing needs by utilising the filter option.
3. **Sort Options**
You can sort the transactions in ascending or descending order using this button.
4. **Clear Filter(s)**
This button will clear existing selected filters.
5. **Customise View Option**
This allows you to customise the display of content type within the table.
6. **Action**
This allows you to view and access actionable options specific to the transaction in view.

Approval Status (Default View)

 **You are in:**
CASH MANAGEMENT

ACCOUNTS

PAY & TRANSFER

SERVICES

ADMIN

MY TASKS 10+



Approval Status

Export

1

All

Pending

Sent to Bank

Rejected

Successful

Transaction Type

Bank Reference

Customer Reference

Account

Currency

Amount

Value / Placement Date

2

Application Date: 04/07/2021 - 01/09/2021

Payer / Payee

Status

4

Clear Filter(s)

631 Record(s)

Note: This table is defaulted to display your transactions in the past 2 months. Use the filters to view other transactions.

Customise View

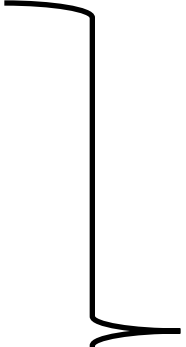
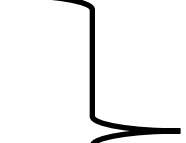
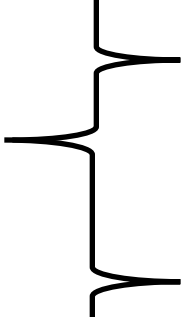
Transaction Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Bulk Upload Payment IAFI GPIDE0109800_s1_M Y012162A.xml		MYR	3,011.00	01/09/2021	2 Record(s)	Processing	6

3

Overview of Approval Status



Transaction Status Mapping

UOB Infinity Transaction Status	Description	
Draft	Transaction is SAVED by user	 Pending
Pending Verification	Transaction is SUBMITTED for verification	
Pending Authorisation	Transaction is SUBMITTED for further authorisation according to your authorisation matrix	
Pending Send	Authorised transaction is PENDING RELEASE to the Bank	
Pending Rework	Transaction is RETURNED to Maker for amendment and re-submission	
Processing	Transaction is submitted to the Bank for PROCESSING	 Sent to Bank
Processing	Post-Dated transaction is submitted to the Bank for PROCESSING	
Successful	Transaction has been PROCESSED by the Bank	 Successful Rejected
Rejected	Transaction has been REJECTED by the Bank	
Partial Rejected	One or more records in the bulk transactions is/are rejected.	

3. How to View Transaction Details

How to View Transaction Details

All Options

- Option 1
- Click on any part of the desired transaction row.
- Option 2
- Click on the icon under “Action”.
- Option 3
- Click on the icon under “Action”, Tap on “View Details”.

All end points would be reflected in (A):
The transaction details will appear in a pop up.

Export Options

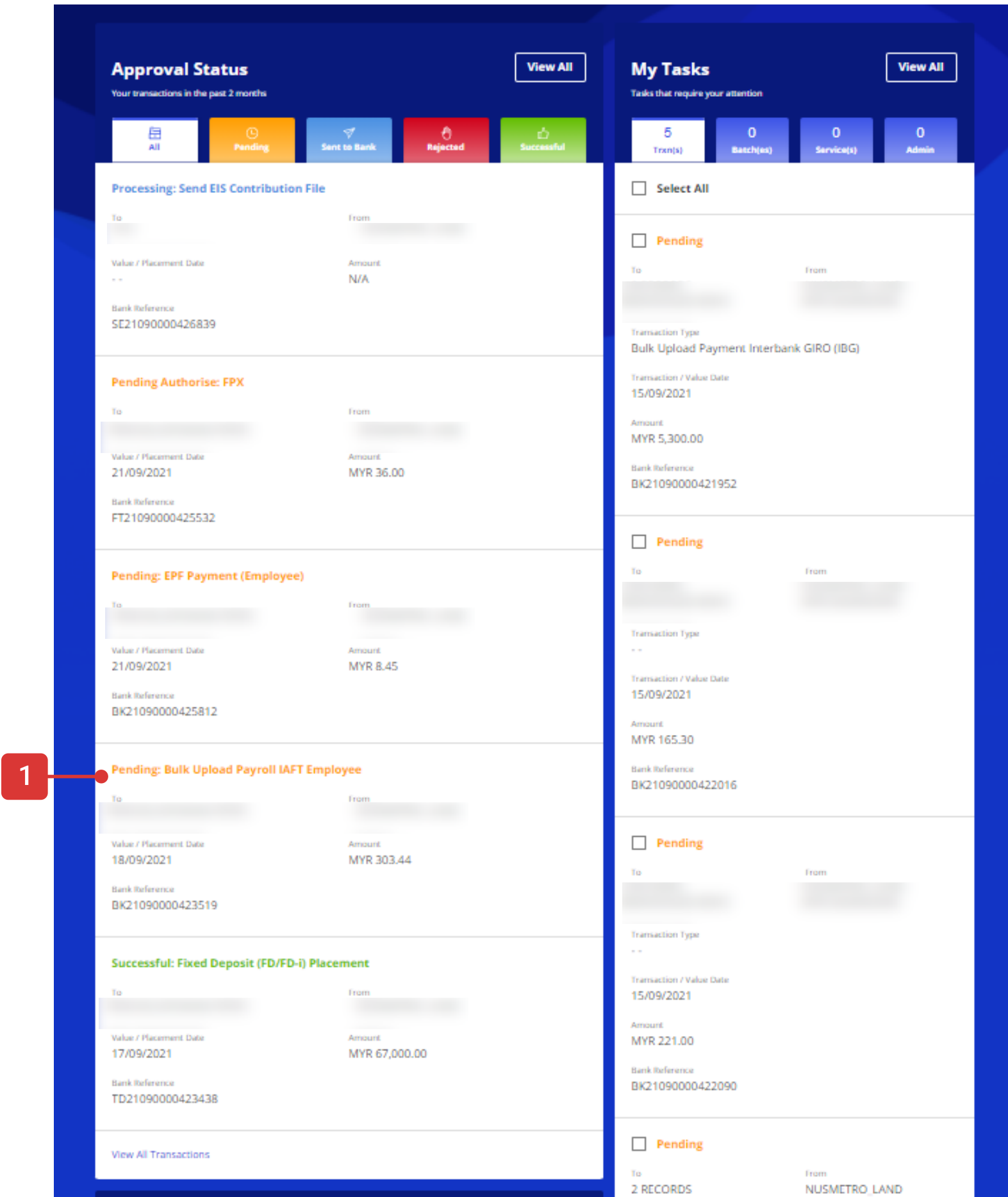
The “Export” button is located at the top right of the transaction details, beside the “Audit Trail” button (B).

- You can export a single transaction as:
- PDF
 - PDF with Audit Trails*

- You can export a bulk transaction as:
- PDF*
 - PDF with Transaction Details*
 - CSV*

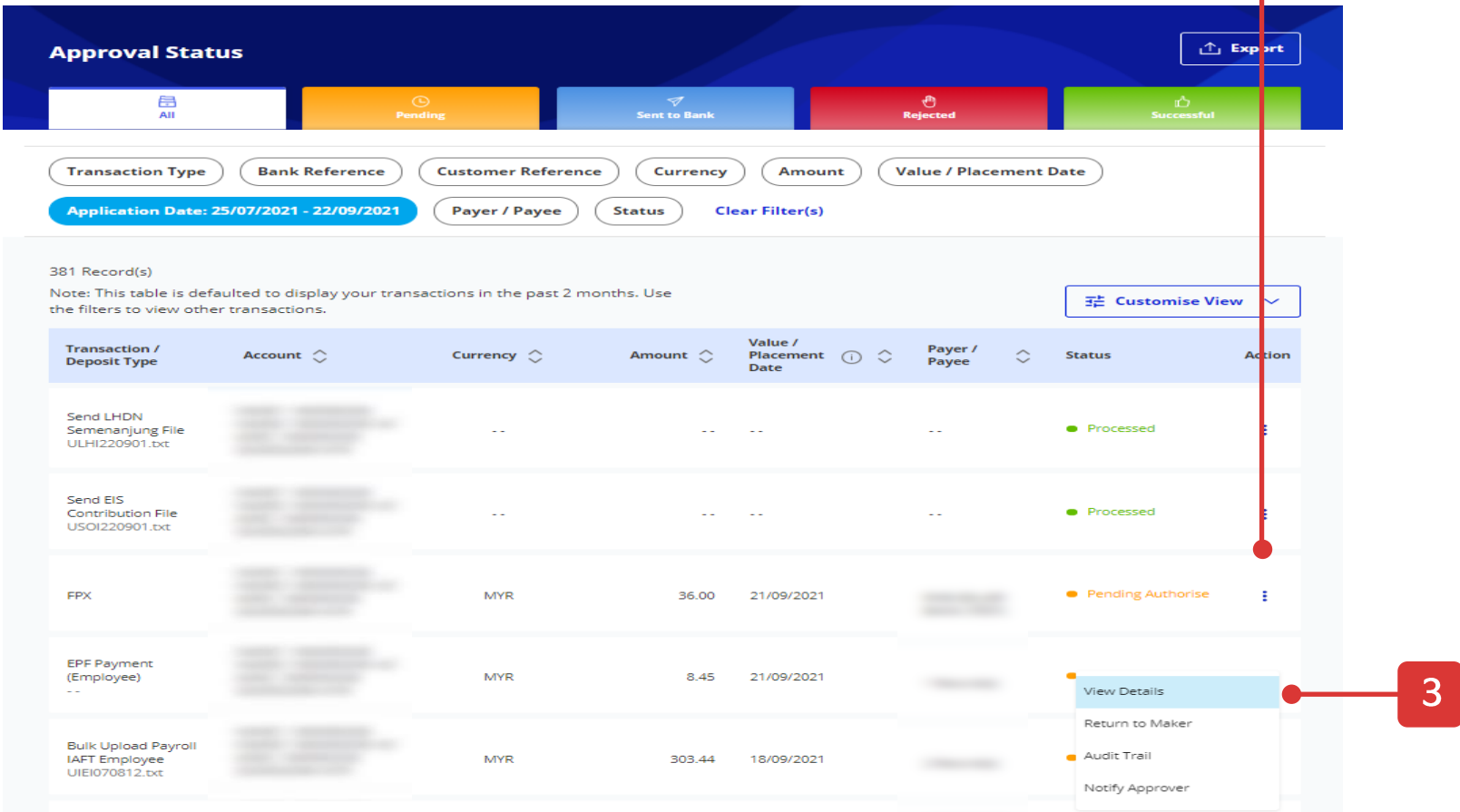
*Note: If you select these export options, you will be able to receive an email to notify you once the exported file is ready for download. Once it is ready, you need to go to “Accounts” at the top menu bar, select “Download Reports” and go to “User Generated” tab to download the exported file.

Dashboard (Default View)



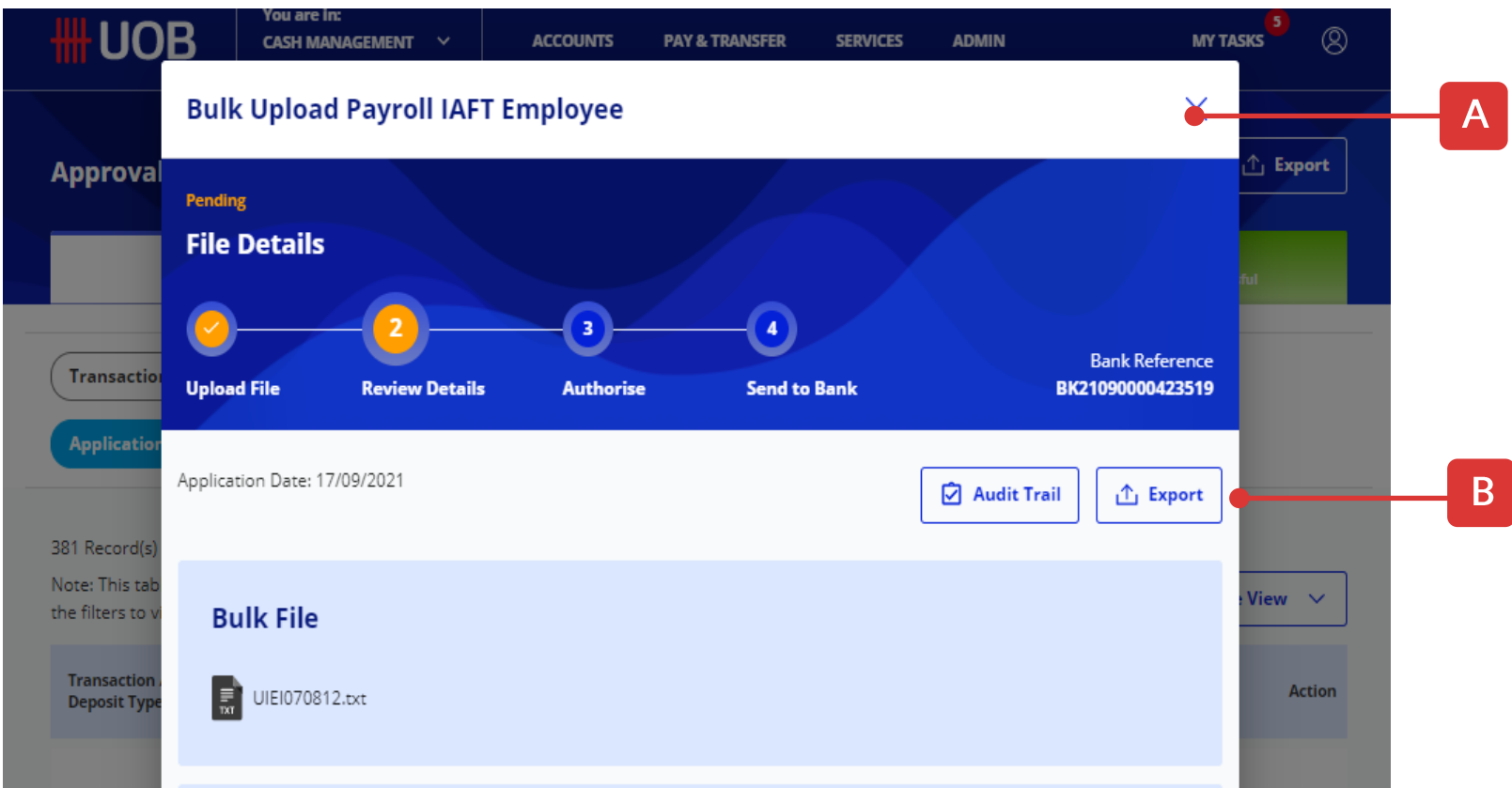
The screenshot shows the UOB Dashboard with a sidebar on the left and a main content area. The sidebar has a 'View All' button at the top. The main content area is divided into two sections: 'Approval Status' and 'My Tasks'. The 'Approval Status' section shows a list of transactions with columns for 'To', 'From', 'Value / Placement Date', 'Amount', and 'Bank Reference'. The 'My Tasks' section shows a list of tasks with columns for 'To', 'From', 'Transaction Type', 'Transaction / Value Date', 'Amount', and 'Bank Reference'. A red box labeled '1' highlights the 'View Details' button in the 'Approval Status' section.

Approval Status (Default View)



The screenshot shows the UOB Approval Status page with a table of transactions. The table has columns for 'Transaction / Deposit Type', 'Account', 'Currency', 'Amount', 'Value / Placement Date', 'Payer / Payee', 'Status', and 'Action'. A red box labeled '2' highlights the 'Export' button at the top right. A red box labeled '3' highlights the 'View Details' button in the 'Action' column.

View Transaction Details



The screenshot shows the UOB View Transaction Details pop-up for a 'Bulk Upload Payroll IAFI Employee' transaction. The pop-up has a title bar with 'Bulk Upload Payroll IAFI Employee' and a close button. Below the title bar is a progress bar with four steps: 'Upload File', 'Review Details', 'Authorise', and 'Send to Bank'. The 'Review Details' step is currently active. The pop-up also shows the 'Bank Reference' (BK21090000423519), 'Application Date' (17/09/2021), and a 'Bulk File' section with a file icon and the name 'UIEI070812.txt'. A red box labeled 'A' highlights the 'View Details' button in the 'Action' column of the background table. A red box labeled 'B' highlights the 'Export' button at the bottom right of the pop-up.

4. How to View the Audit Trail

How to View the Audit Trail



All Options

Option 1

- Click on any part of the desired transaction row.
- Select “Audit Trail” (Reflected in A)

Option 2

- Click on the icon under “Action”.
- Tap “Audit Trail” (Reflected in A)

All end points would be reflected in (B):
View your Audit Trail Details that will appear in a pop up.

If your transactions are pending for approval, you will be able to see the next approvers who are able to approve your transactions.

Approval Status (Default View)

2

Approval Status										Export
All	Pending	Send to Bank	Rejected	Successful						
Transaction Type Bank Reference Customer Reference Currency Amount Value / Placement Date										
Application Date: 25/07/2021 - 22/09/2021 Payer / Payee Status Clear Filter(s)										
381 Record(s)										
Note: This table is defaulted to display your transactions in the past 2 months. Use the filters to view other transactions.										
Customise View										
Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action			
Send LHDN Semenanjung UHLH220901.txt		--	--	--	--	Processed				
Send EIS Contribution File USQI220901.txt		--	--	--	--	Processed				
FPX		MYR	36.00	21/09/2021		Pending Authorise				
EPF Payment (Employee)		MYR	8.45	21/09/2021		Pending				
Bulk Upload Payroll IAFI Employee UIEI070812.txt		MYR	303.44	18/09/2021		Pending	View Details Return to Maker Audit Trail Notify Approver			
Fixed Deposit (FD/FD-) Placement		MYR	67,000.00	17/09/2021		Processing				
--		MYR	77.00	17/09/2021		Processing				
--		MYR	73.00	17/09/2021		Processing				
--		MYR	81.00	17/09/2021		Processing				
--		MYR	69.00	17/09/2021		Processing				

1

View Transaction Details

UOB

CASH MANAGEMENT

ACCOUNTS

PAY & TRANSFER

SERVICES

ADMIN

MY TASKS

Bulk Upload Payroll IAFI Employee

Pending

File Details

1 Upload File

2 Review Details

3 Authorise

4 Send to Bank

Bank Reference BK21090000423519

Application Date: 17/09/2021

Audit Trail

Export

Bulk File

UIEI070812.txt

A

View Audit Trail

UOB

CASH MANAGEMENT

ACCOUNTS

PAY & TRANSFER

SERVICES

ADMIN

MY TASKS

Pending

File Details

1 Upload File

2 Review Details

3 Authorise

4 Send to Bank

Bank Reference BK21090000423519

Audit Trail

Create

Michael Ding

17/09/2021 06:28:23 PM +08:00

Authorise

Authorisation Level: A or B

See Authorisers

OK

B

5. How to Approve Your Transaction (via Approval Status)

How to Approve Your Transaction? (via Approval Status)



Option 1

- Step 1

 - Click on any part of the desired transaction row.
- Step 2

Selected transaction summary will appear in a pop up

 - Click on the  button at the bottom of the transaction's summary.

Approval Status (Default View)

Approval Status

Export

AllPendingSent to BankRejectedSuccessful

Transaction TypeBank ReferenceCustomer ReferenceCurrencyAmountValue / Placement Date

Application Date: 25/07/2021 - 22/09/2021Payer / PayeeStatusClear Filter(s)

381 Record(s)

Note: This table is defaulted to display your transactions in the past 2 months. Use the filters to view other transactions.

Customise View

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Bulk Upload Payment Cheques PAIDE1509223.txt		MYR	1,007.19	15/09/2021		Successful	
--		MYR	65.30	15/09/2021		Rejected	
--		MYR	45.30	15/09/2021		Successful	
Bulk Upload Payment Interbank/ GIRO (IBG) GPIDE1509115_s1.Y012162A.xml		MYR	5,300.00	15/09/2021		Pending	
DuitNow (DuitNow ID)		MYR	50,000.00	15/09/2021		Pending Authorise	
DuitNow (DuitNow ID)		MYR	1,000.00	14/09/2021		Pending Authorise	
Transfer to UOB Account		MYR	100.00	14/09/2021		Pending Authorise	
Bulk Payment RENTAS		MYR	12,000.00	14/09/2021		Processing	
Bulk Payment RENTAS		MYR	24,000.00	14/09/2021		Processing	
Bulk Payment RENTAS		MYR	33,042.00	--		Draft	

View Transaction Details

From

Company Name

Account Name

Account Number

Currency

MYR

To

Payee's account details

DuitNow ID Type

Passport Number

Payee's Nickname

UAT015

Issuing Country

Malaysia

Pre-Approved Payee

Payee Residence Status

Resident

Amount & When

Transfer Date

15/09/2021

Transaction Currency

MYR

Charges

0.00

Recipient Reference

EXN

Transaction Amount

50,000.00

Cancel

Return

Approve

How to Approve Your Transaction? (via Approval Status)

Option 2

- Step 1
- Click on the icon under “Action” menu.
 - Tap on “Approve” in the expanded menu
- Step 2
- Follow the on-screen instructions to authorise the request.

Approval Status (Default View)

Approval Status

Export

Transaction Type

Bank Reference

Customer Reference

Currency

Amount

Value / Placement Date

Application Date: 25/07/2021 - 22/09/2021

Payer / Payee

Status

Clear Filter(s)

381 Record(s)

Note: This table is defaulted to display your transactions in the past 2 months. Use the filters to view other transactions.

Customise View

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Bulk Upload Payment Cheques PAIDE1509223.txt		MYR	1,007.19	15/09/2021		Successful	
...		MYR	65.30	15/09/2021		Rejected	
...		MYR	45.30	15/09/2021		Successful	
Bulk Upload Payment Interbank GIRO (IBG) GPIDE1509115_s1 YD12162A.xml		MYR	5,300.00	15/09/2021		Pending	
DuitNow (DuitNow ID)		MYR	50,000.00	15/09/2021			
DuitNow (DuitNow ID)		MYR	1,000.00	14/09/2021			
Transfer to UOB Account		MYR	100.00	14/09/2021		Pending Authorise	
Bulk Payment RENTAS		MYR	12,000.00	14/09/2021		Processing	
Bulk Payment RENTAS		MYR	24,000.00	14/09/2021		Processing	
Bulk Payment RENTAS		MYR	33,042.00	--		Draft	

View Details

Approve

Return

Audit Trail

Token Response

Enter Token Response

Follow these steps on your token:

1 Press 1

2 Enter 2022 & press OK

3 Enter 1013 3010 & press OK

4 Enter the 6-digit security code on your token

Token Response

By clicking 'Submit', you are deemed to have read and agreed to the [Terms & Conditions](#) of the respective product(s) and / or service(s).

Cancel

Submit

6. How to Return the Transaction to Maker

How to Return the Transaction to Maker?

Option 1

- Step 1

 - Click anywhere within the desire transaction row.
- Step 2

 - Tap on “Return” button at the bottom of the transaction summary.
- Step 3

 - Status will be shown as “Pending Rework”.

Approval Status (Default View)

Approval Status

Transaction / Deposit Type

BIB Reference

Customer Reference

Account

Currency

Amount

Value / Placement Date

Application Date: 12/07/2018 - 11/09/2018

Payer / Payee

Status

Clear Filter(s)

88 Record(s)

Note: This table is defaulted to display your transactions in the past 2 months. Use the filters to view other transactions.

Customise View

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Telegraphic Transfer / MEPS		SGD	18,000.00	11/11/2019		Pending Approval	
Cashier's Order		SGD	1,234,567,890,123.00	08/08/2018		Rejected	
Telegraphic Transfer / MEPS		SGD	1,234,567,890,123.00	08/08/2018		Processing	
Transfer to UOB Account		SGD	1,234,567,890,123.00	08/08/2018		Pending Approval	
Bulk IBG Payment Express		SGD	1,234,567,890,123.00	08/08/2018		Draft	
Telegraphic Transfer / MEPS (Recurring)		SGD	1,234,567,890,123.00	08/08/2018		Termination Successful	
Cashier's Order		SGD	1,234,567,890,123.00	08/08/2018		Rejected	
Telegraphic Transfer / MEPS		SGD	1,234,567,890,123.00	08/08/2018		Processing	
Bulk IBG Payment Normal		SGD	1,234,567,890,123.00	08/08/2018		Draft	
Transfer to UOB Account (Recurring)		SGD	1,234,567,890,123.00	08/08/2018		Processing	

This transaction has a Termination Request. It is Pending Approval

View Transaction Details

From

Company Name

Account Name

Account Number

1990152501

Currency

SGD

To

Payee Name

Ang Mo Kio Town Council

Account Number

123456789asdfs

Currency

SGD

Amount & When

Transfer Date

27/12/2020

Transfer Currency

SGD

Transaction Amount

18,000.00

☒ This is a recurring payment

Frequency of Payment

Daily

Number of times

1

Customer Reference

27/12/2020

Remarks for Approval

Please approve this payment

Cancel

Return

Approve

Transaction / Deposit Type	BIB Reference	Currency	Amount	Value / Placement Date	Application Date	Status	Action
Telegraphic Transfer / MEPS	8720010001130497	USD	111.00	14/01/2020	14/01/2020	Pending Rework	

How to Return the Transaction to Maker?

Option 2

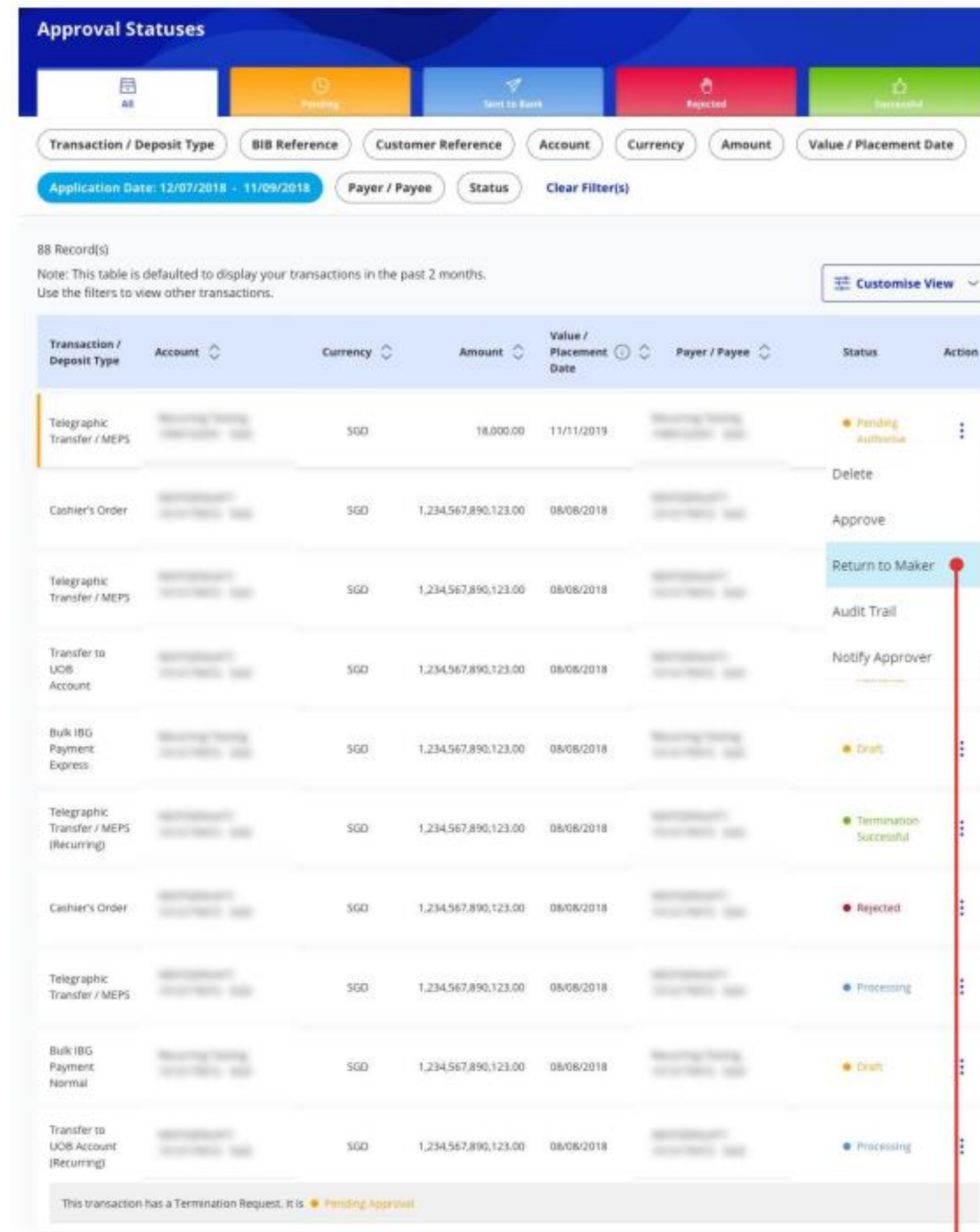
Step 1

- Click on the icon under “Action” menu.
- Tap on “Return to Maker” in the expanded menu.

Step 2

- Click on “Submit” button in the dialog box.

Approval Status (Default View)



Approval Statuses

Transaction / Deposit Type: Pending | Sent to Bank | Rejected | Successful

Filters: Transaction / Deposit Type, BIB Reference, Customer Reference, Account, Currency, Amount, Value / Placement Date

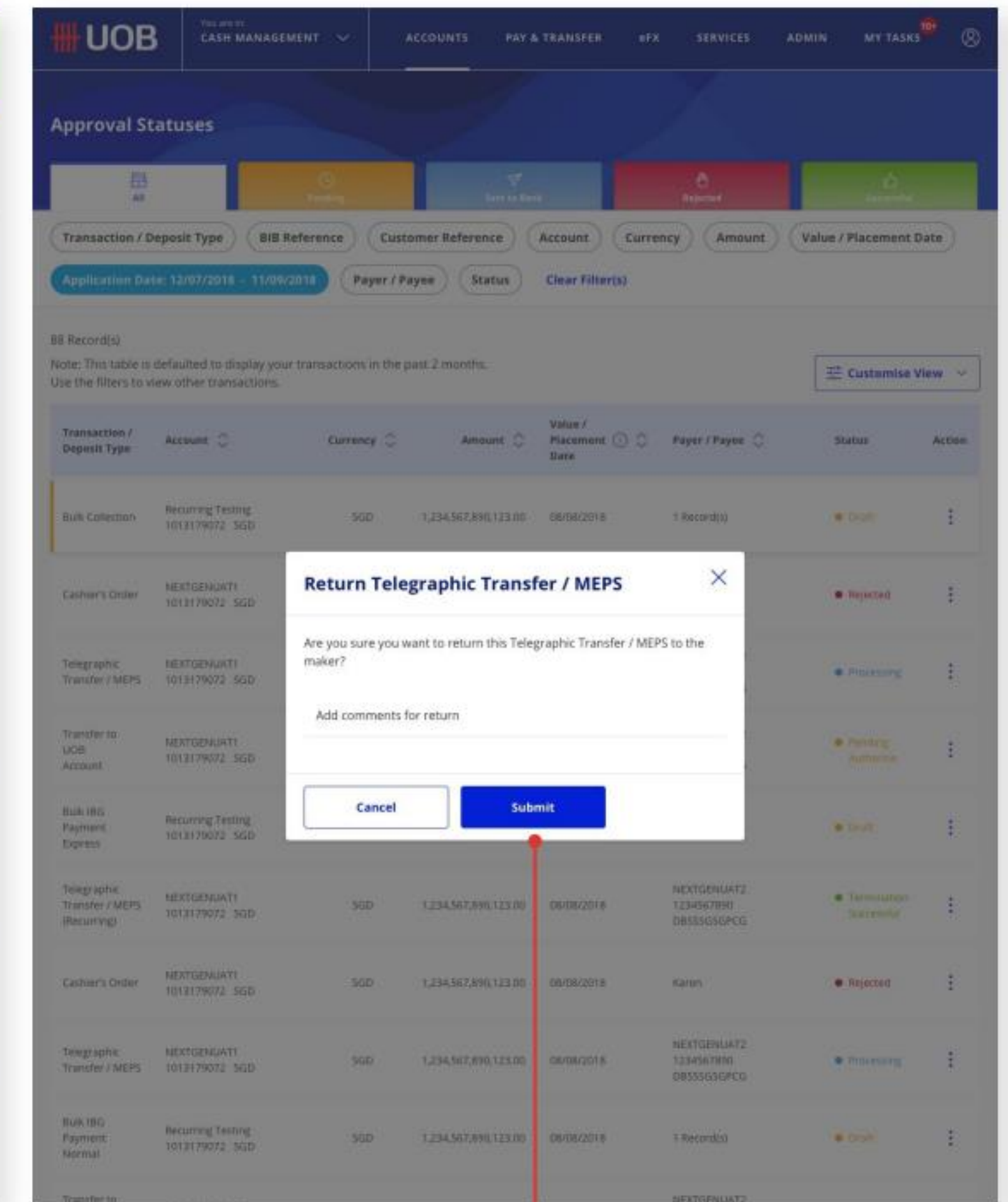
Application Date: 12/07/2018 - 11/09/2018 | Payer / Payee | Status | Clear Filter(s)

88 Record(s)
Note: This table is defaulted to display your transactions in the past 2 months. Use the filters to view other transactions.

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Telegraphic Transfer / MEPS		SGD	18,000.00	11/11/2019		Pending Authorisation	⋮
Cashier's Order		SGD	1,234,567,890,123.00	08/08/2018			Delete
Telegraphic Transfer / MEPS		SGD	1,234,567,890,123.00	08/08/2018			Approve
Transfer to UOB Account		SGD	1,234,567,890,123.00	08/08/2018			Return to Maker
Bulk IBG Payment Express		SGD	1,234,567,890,123.00	08/08/2018			Audit Trail
Telegraphic Transfer / MEPS (Recurring)		SGD	1,234,567,890,123.00	08/08/2018			Notify Approver
Cashier's Order		SGD	1,234,567,890,123.00	08/08/2018			
Telegraphic Transfer / MEPS		SGD	1,234,567,890,123.00	08/08/2018			
Bulk IBG Payment Normal		SGD	1,234,567,890,123.00	08/08/2018			
Transfer to UOB Account (Recurring)		SGD	1,234,567,890,123.00	08/08/2018			

This transaction has a Termination Request. It is Pending Approval.

View Transaction Details



UOB | You are in CASH MANAGEMENT | ACCOUNTS | PAY & TRANSFER | eFX | SERVICES | ADMIN | MY TASKS

Approval Statuses

Transaction / Deposit Type: Pending | Sent to Bank | Rejected | Successful

Filters: Transaction / Deposit Type, BIB Reference, Customer Reference, Account, Currency, Amount, Value / Placement Date

Application Date: 12/07/2018 - 11/09/2018 | Payer / Payee | Status | Clear Filter(s)

88 Record(s)
Note: This table is defaulted to display your transactions in the past 2 months. Use the filters to view other transactions.

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Bulk Collection	Recurring Testing 1013179072	SGD	1,234,567,890,123.00	08/08/2018	1 Record(s)	Draft	⋮
Cashier's Order	NEXTGENUAT1 1013179072	SGD				Rejected	⋮
Telegraphic Transfer / MEPS	NEXTGENUAT1 1013179072	SGD				Pending	⋮
Transfer to UOB Account	NEXTGENUAT1 1013179072	SGD				Pending Authorisation	⋮
Bulk IBG Payment Express	Recurring Testing 1013179072	SGD				Draft	⋮
Telegraphic Transfer / MEPS (Recurring)	NEXTGENUAT1 1013179072	SGD	1,234,567,890,123.00	08/08/2018	NEXTGENUAT2 1234567890 DBSSGSGPCG	Termination Successful	⋮
Cashier's Order	NEXTGENUAT1 1013179072	SGD	1,234,567,890,123.00	08/08/2018	Karen	Rejected	⋮
Telegraphic Transfer / MEPS	NEXTGENUAT1 1013179072	SGD	1,234,567,890,123.00	08/08/2018	NEXTGENUAT2 1234567890 DBSSGSGPCG	Processing	⋮
Bulk IBG Payment Normal	Recurring Testing 1013179072	SGD	1,234,567,890,123.00	08/08/2018	1 Record(s)	Draft	⋮
Transfer to					NEXTGENUAT2		⋮

Return Telegraphic Transfer / MEPS

Are you sure you want to return this Telegraphic Transfer / MEPS to the maker?

Add comments for return

Cancel Submit

7. How to Edit a Pending Transaction

How to Edit a Pending Transaction

To edit a transaction under Pending Status

Step 1

- Click on the icon under “Action” menu.
- Tap on “Edit”

Step 2

- Click “OK” in the modal to proceed with the editing of the transactions.

Approval Status (Default View)

Approval Status Export

All
Pending
Sent to Bank
Rejected
Successful

Transaction Type Bank Reference Customer Reference Account Currency Amount Value / Placement Date

Application Date: 13/08/2021 - 13/08/2021 Payer / Payee Status Clear Filter(s)

10 Record(s)

Note: This table is defaulted to display your transactions in the past 2 months. Use the filters to view other transactions.

Customise View

Transaction Type	Bank Reference(s)	Account	Currency	Amount	Value / Placement Date	Status	Action
Bulk Payroll	BK21080001763241		SGD	12.00	13/08/2021	Draft	
Telegraphic Transfer / MEPS	FT21080001763238		USD	100.00	13/08/2021	Pending	View Details Edit Delete Approve Return to Maker
Bulk Telegraphic Transfers / MEPS	BK21080001763233		USD	100.00	13/08/2021		
Transfer to UOB Account	FT21080001763231		USD	10.00	13/08/2021		

Approval Status Export

All
Pending
Sent to Bank
Rejected
Successful

Transaction Type Bank Reference Customer Reference Account Currency Amount Value / Placement Date

Application Date: 13/08/2021 - 13/08/2021 Payer / Payee Status Clear Filter(s)

9 Record(s)

Note: This table is defaulted to display your transactions in the past 2 months. Use the filters to view other transactions.

Customise View

Reauthorisation Needed if Modified

Please be informed that this transaction will need to go through the authorisation process again if it is modified.

OK

8. How to Delete Transactions

How to Delete Transactions

Single Deletion Method

Step 1

- Click on the icon under "Action" menu.

- Tap on "Delete"

Step 2

- Click "Yes" in the modal to delete transaction.

Approval Status (Default View)

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Bulk Payment RENTAS		MYR	33,042.00	--	3 Record(s)	Draft	View Details Edit Delete Audit Trail
Bulk Telegraphic Transfer		SGD	90.70	--	2 Record(s)		
Bulk Payment Transfer to UOB Account		MYR	9,999.00	16/08/2021	1 Record(s)	Draft	

1

Delete Bulk Transaction Modal

A screenshot of a web application interface showing a modal dialog box. The dialog has a title bar that says "Delete Draft / Pending Rework" with a close button (X) on the right. Below the title bar, the text "Are you sure you want to only delete this record?" is displayed. At the bottom of the dialog, there are three buttons: "Cancel", "Select More", and "Yes". The "Yes" button is highlighted with a red circle. The background of the application is partially visible, showing a table with columns for Name, Amount, and Date, and a status column. The "Draft" status is visible in the background.

2

Multiple Deletion Method

Step 1

- Click on the icon under "Action" menu.

- Tap on “Delete”

Step 2

- Click "Select More" in the modal to delete transaction.

Step 3

- There will be a new column with checkboxes for users to tick which transactions to be deleted. Click "Delete Selected" to confirm the deletion.

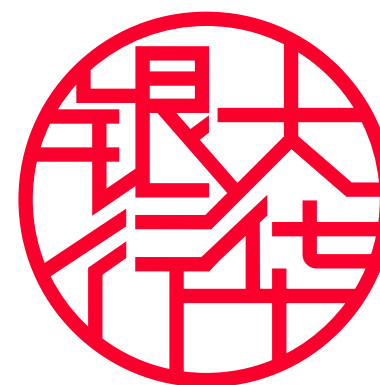
Note: This table is defaulted to display your transactions in the past 2 months. Use the filters to view other transactions.

☐	Transaction / Deposit Type	Account ▾	Currency ▾	Amount ▾	Value / Placement Date ⓘ ▾	Payer / Payee ▾	Status
☒	Bulk Payment RENTAS		MYR	33,042.00	--	3 Record(s)	Draft
☒	Bulk Telegraphic Transfer		SGD	90.70	--	2 Record(s)	Draft
☒	Bulk Payment Transfer to UOB Account		MYR	9,999.00	16/08/2021	1 Record(s)	Draft
☐	Bulk Payroll DuitNow (DuitNow ID)		MYR	224.89	--	1 Record(s)	Draft
☐	Bulk Payroll DuitNow (DuitNow ID)		MYR	--	--	0 Record(s)	Draft

1 - 5 of 5 Record(s)

3

3



Right By You