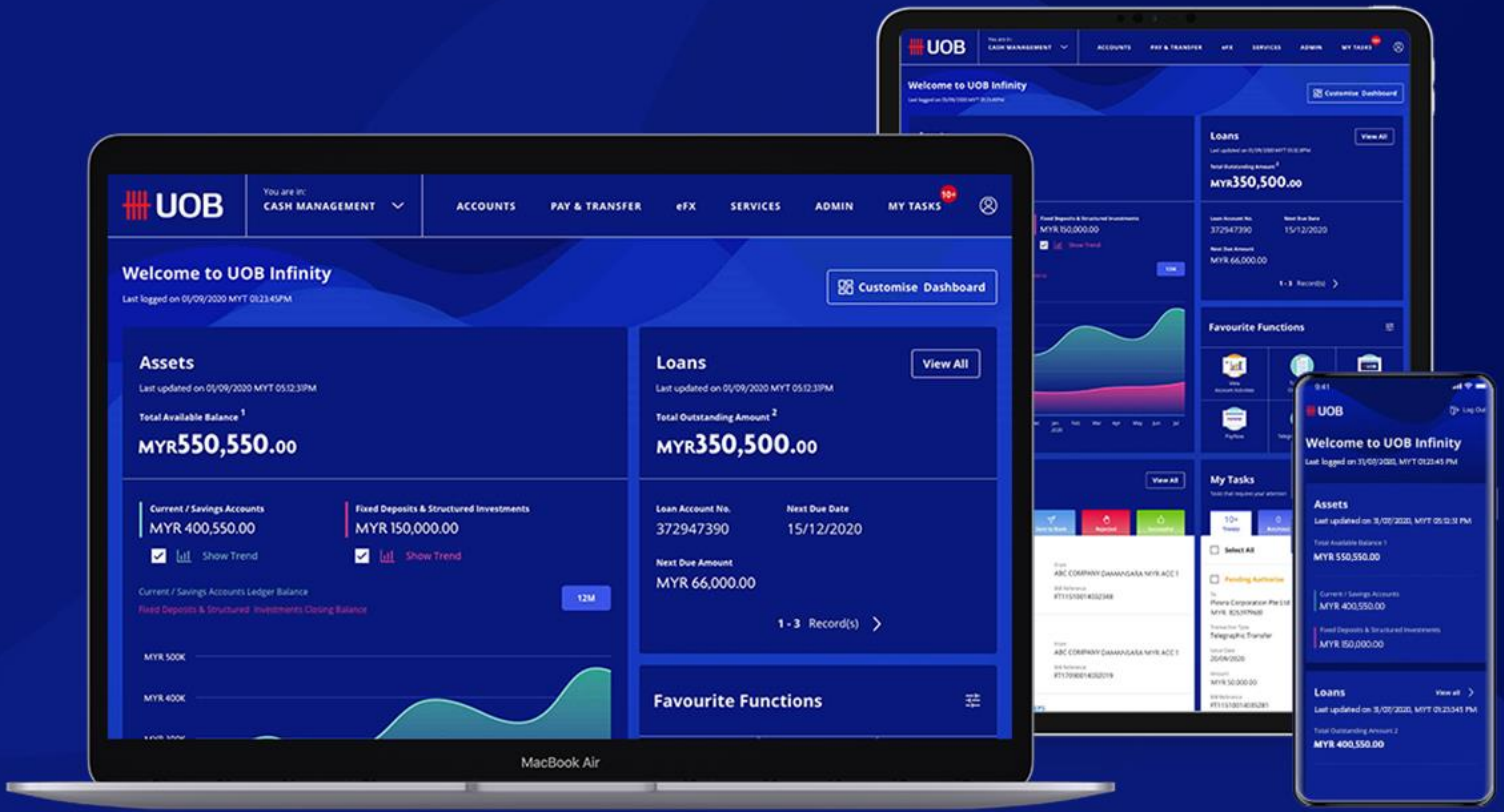
INFINITY
User Guide



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03.01.2025 (Ver 1.3)

Approval Status

Approval Status

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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

The Different Entry Points

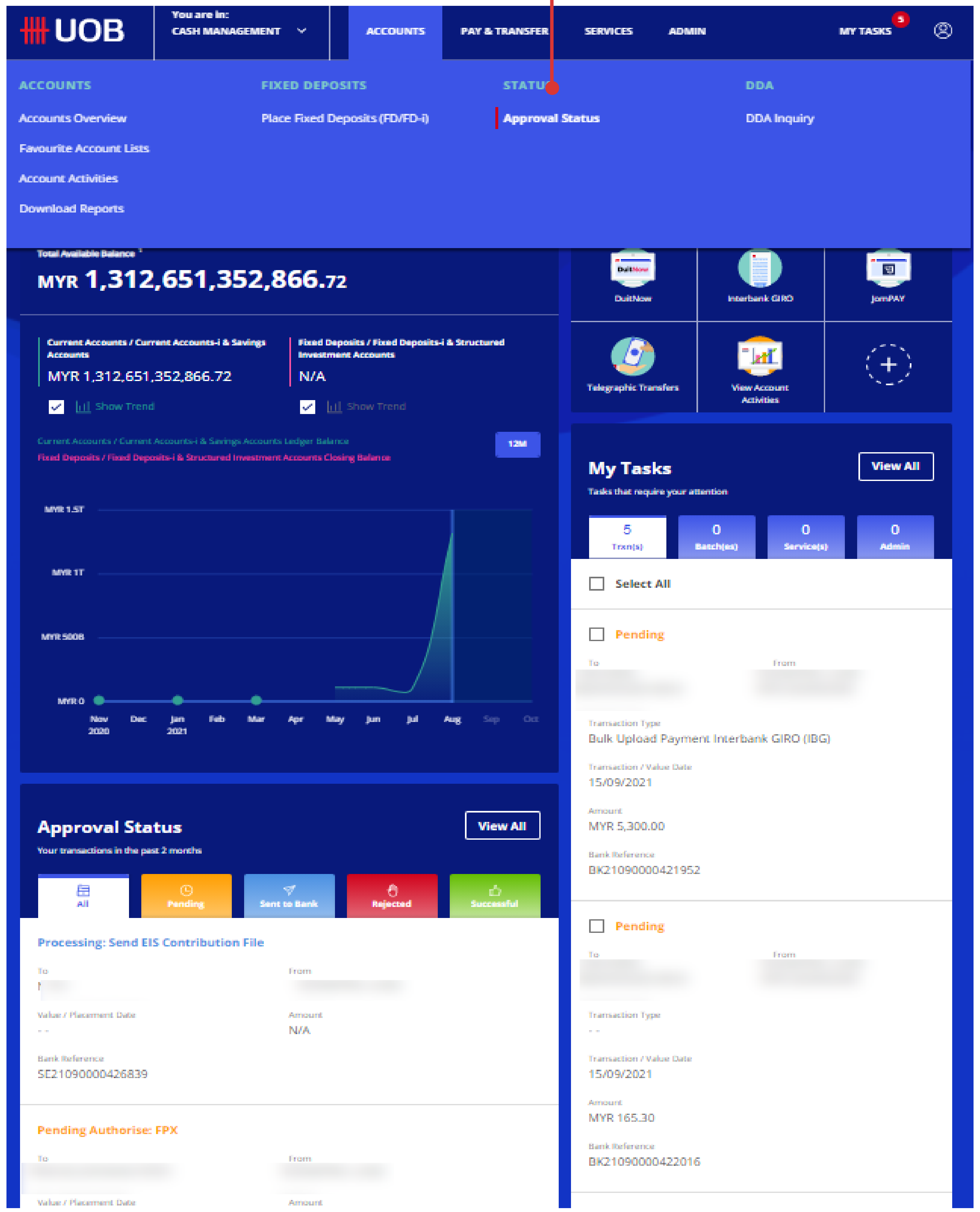
Entry point 1
Hover over “Accounts” on the navigation bar and select “Approval Status” (under “Status”).

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”.

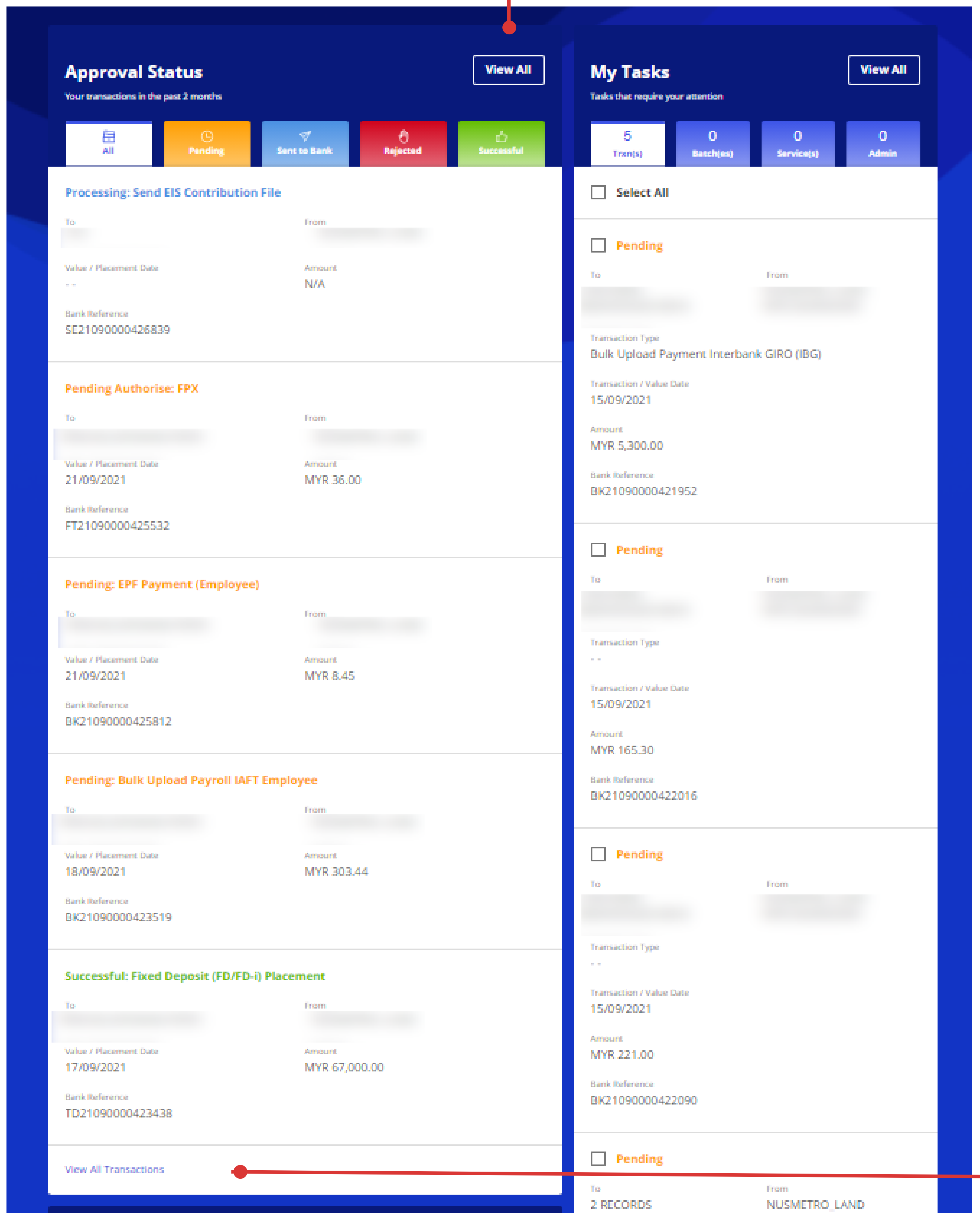
1

Global Menu (Expanded View)



Approval Status Default View

2



3

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.

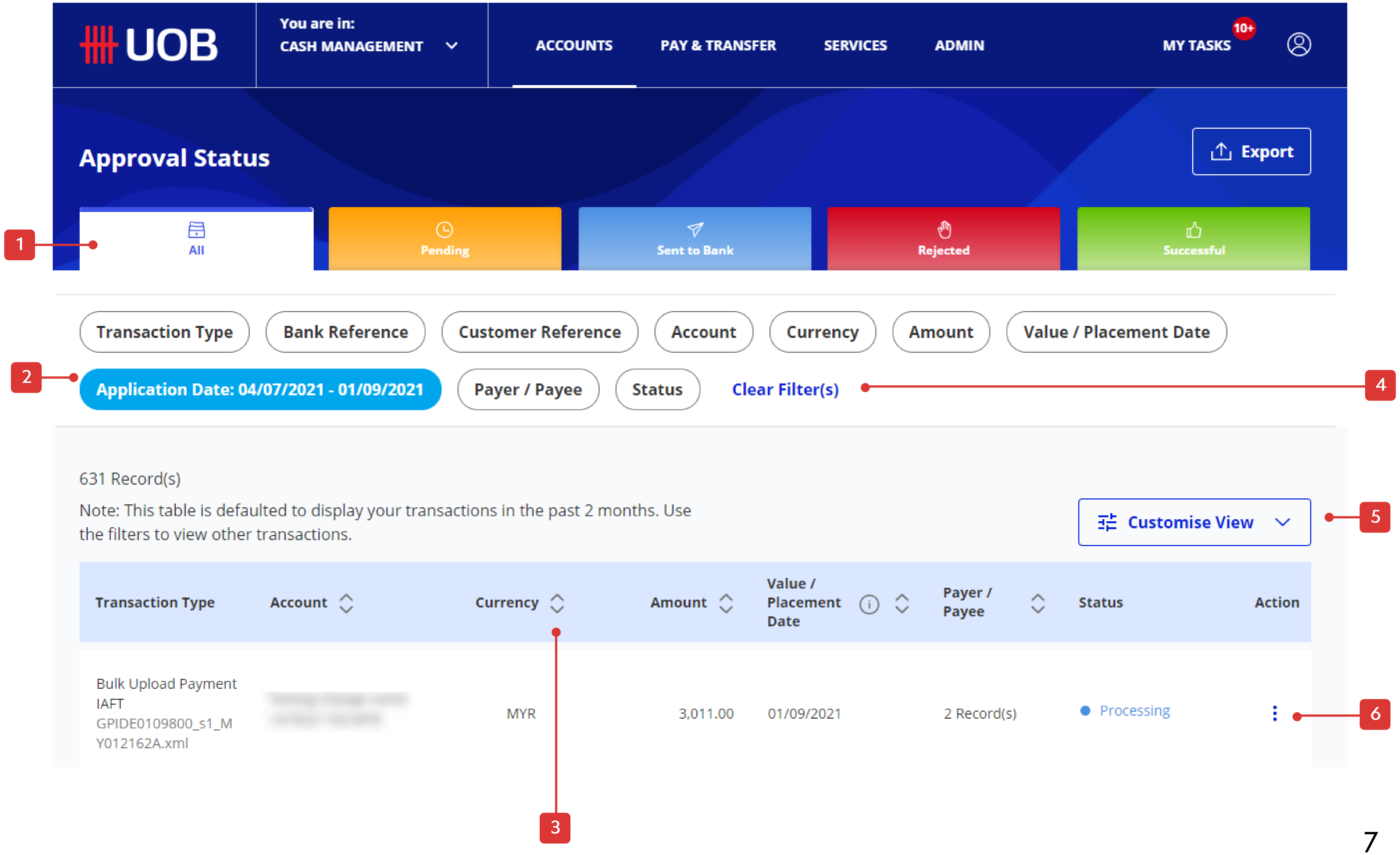
3. Sort Options
You can sort the transactions in ascending or descending order using this button.

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)



Overview of Approval Status

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Transaction Status Mapping

UOB Infinity Transaction Status	Description
Draft	Transaction is SAVED by user
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
Processing	Post-Dated transaction is submitted to the Bank for PROCESSING
Successful	Transaction has been PROCESSED by the Bank
Rejected	Transaction has been REJECTED by the Bank
Partial Rejected	One or more records in the bulk transactions is/are rejected.

Pending

Sent to Bank

Successful

Rejected

3. How to View Transaction Details

How to View Transaction Details

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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)**.

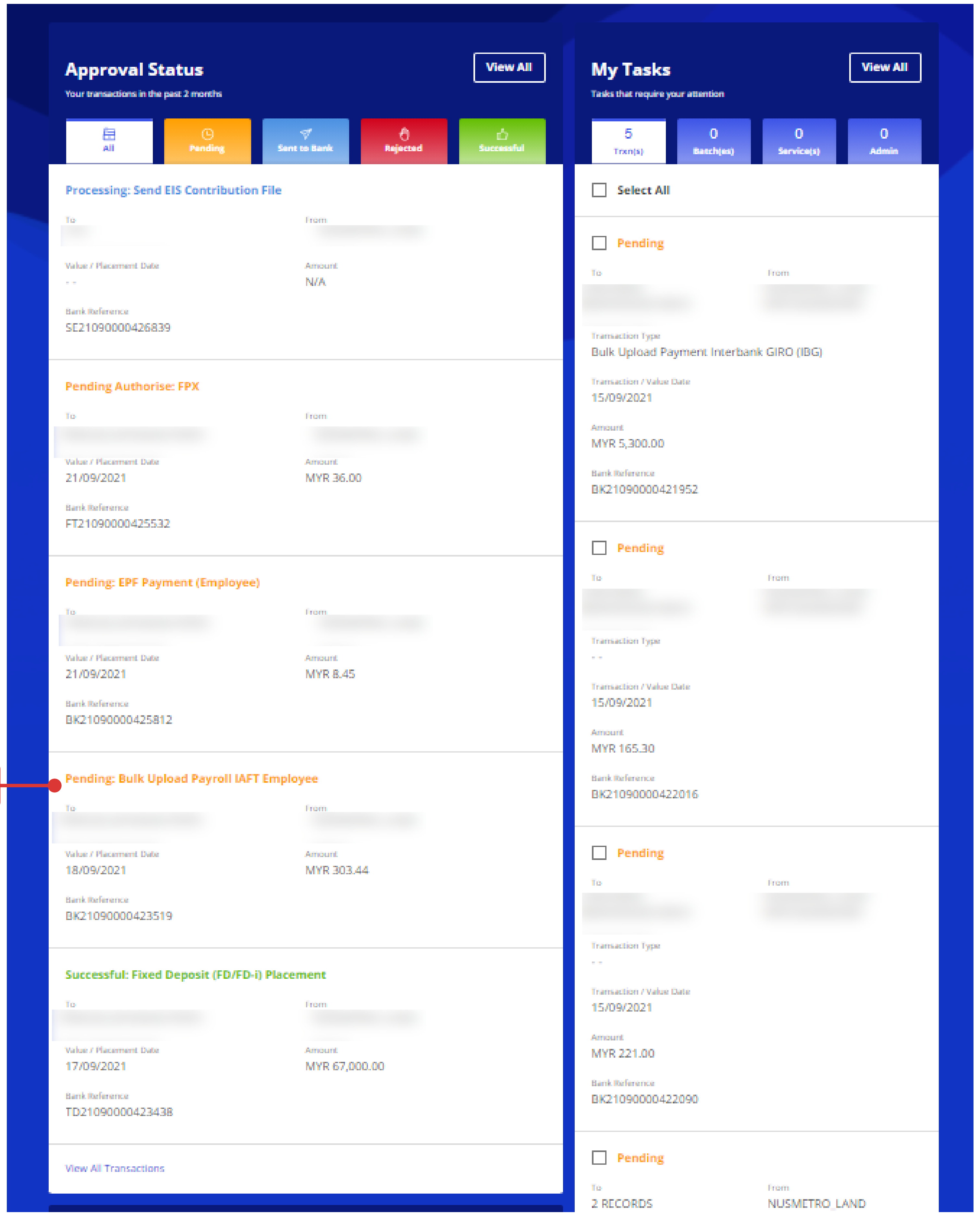
You can export a single transaction as:
- PDF
- PDF with Audit Trails*

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)

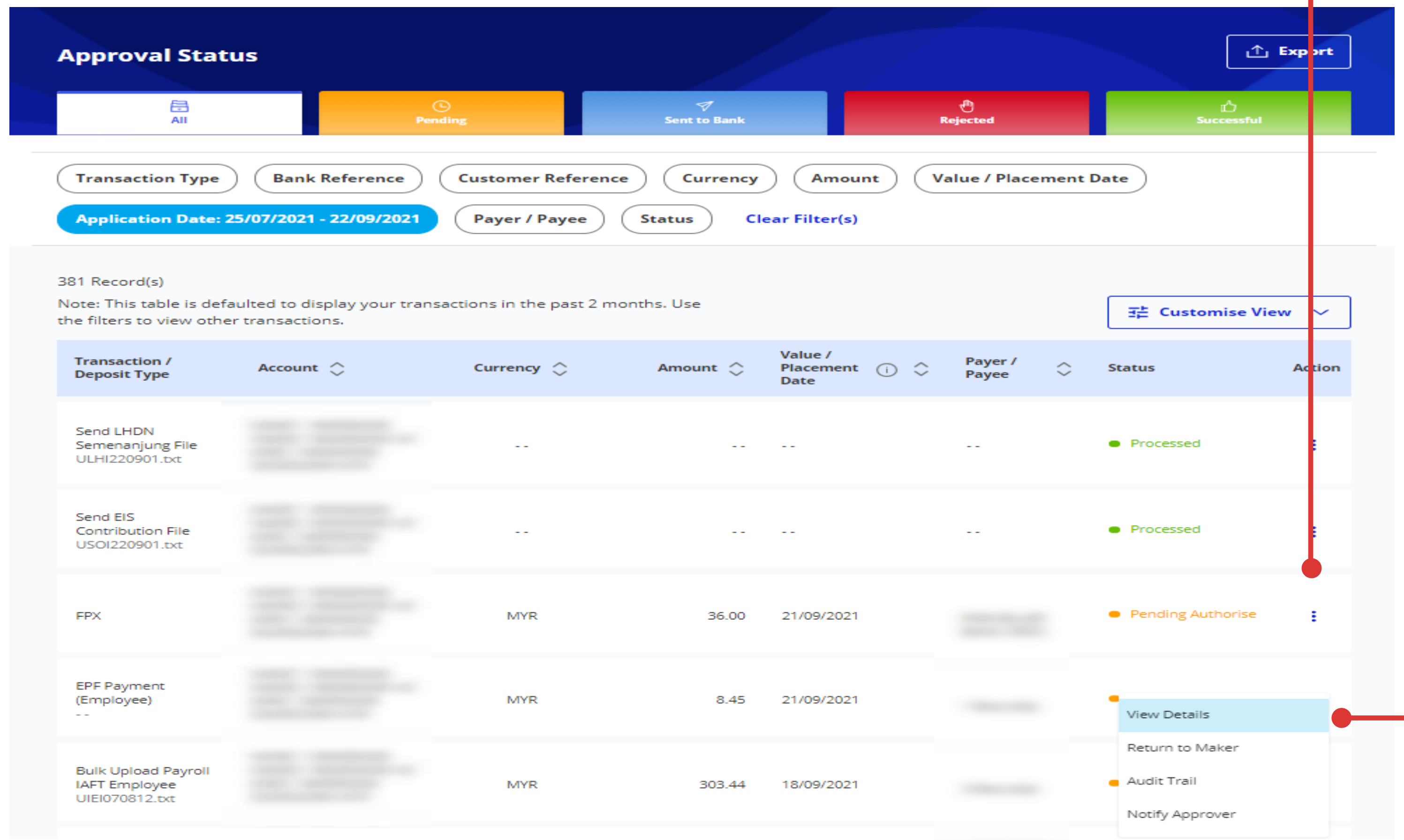
1



Approval Status (Default View)

2

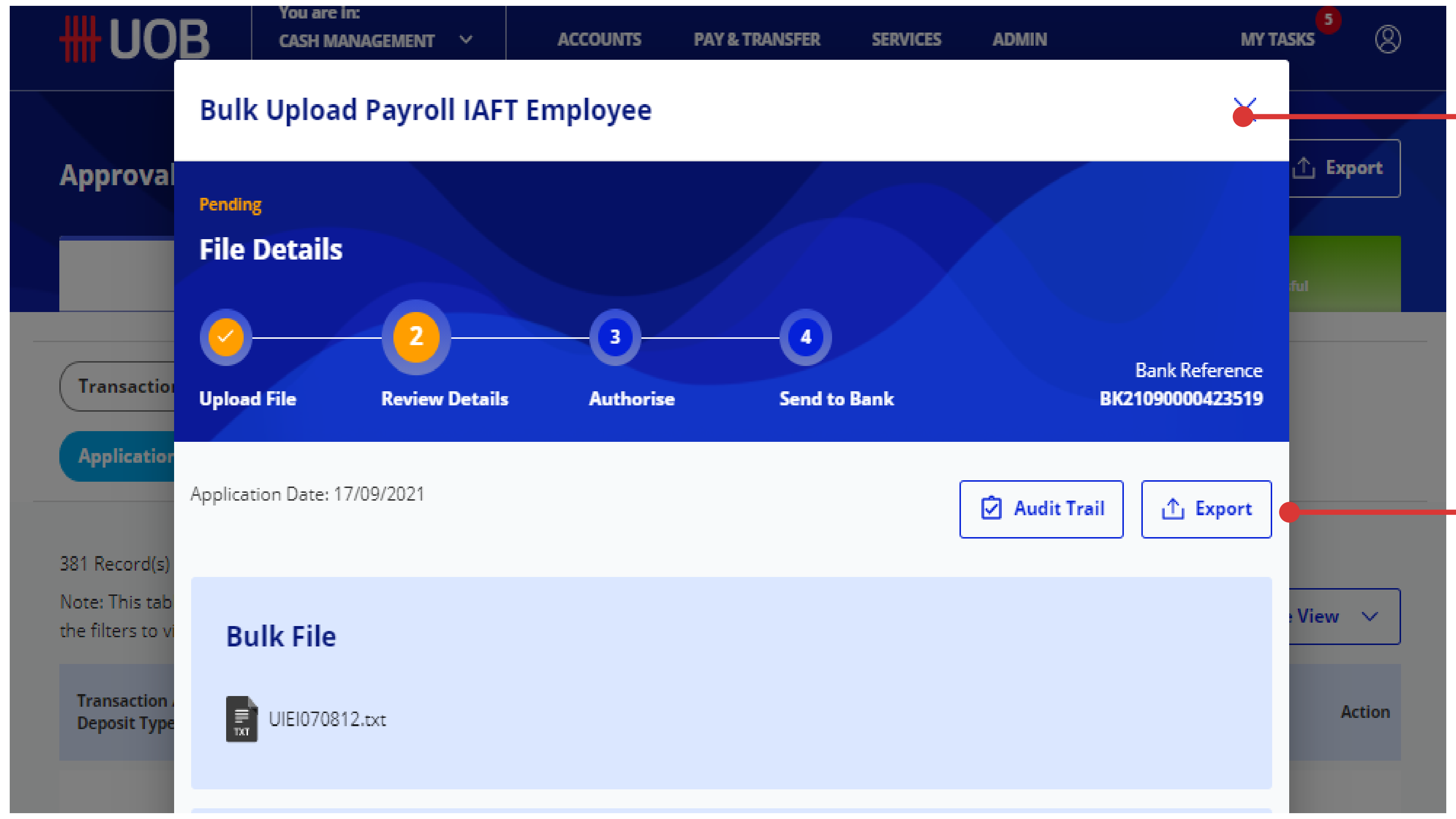
3



View Transaction Details

A

B



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4. How to View the Audit Trail

How to View the Audit Trail

All Options

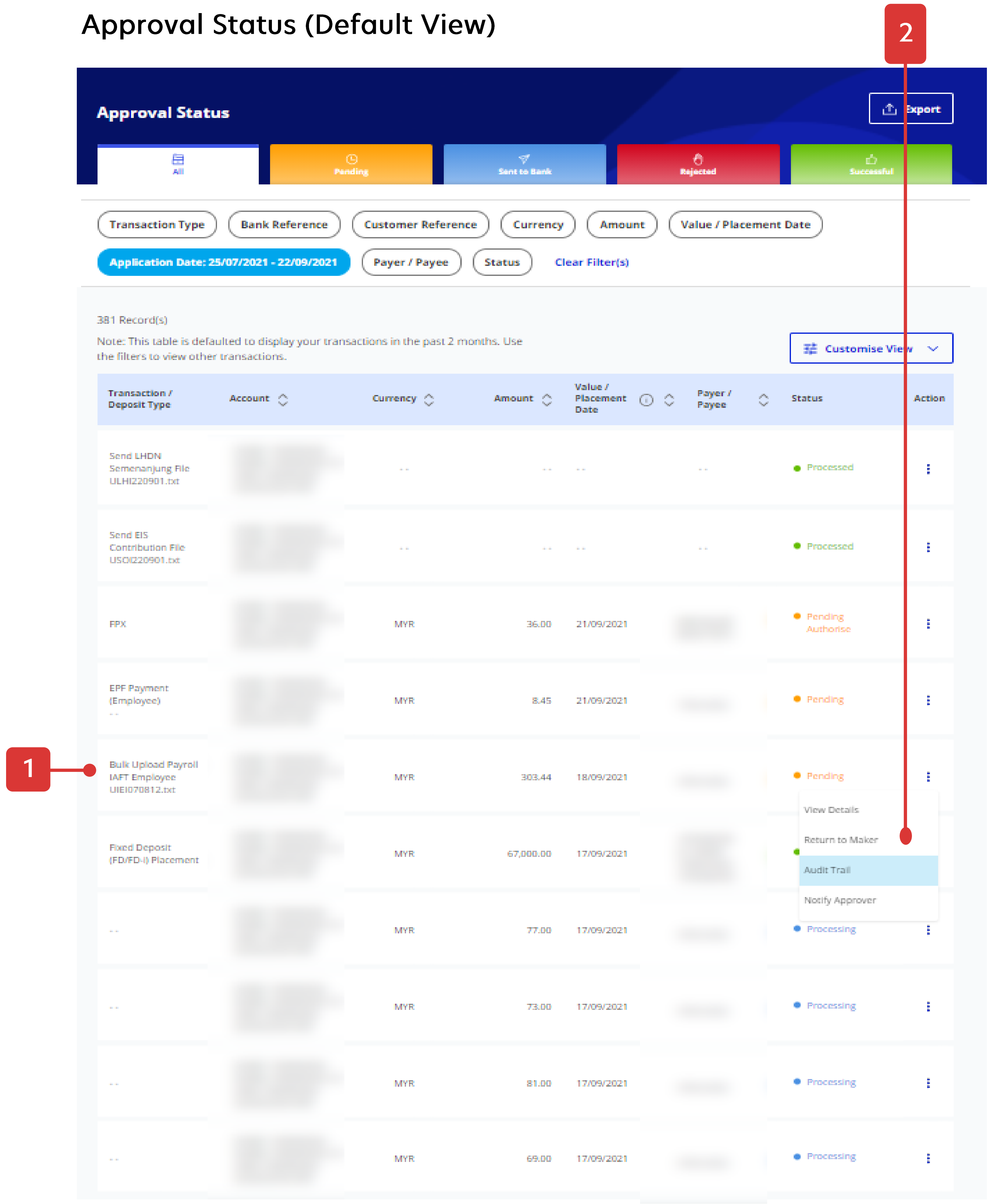
Option 1
- Click on any part of the desired transaction row.
- Select "Audit Trail" (Reflected in **A**)

Option 2
- Click on the icon under "Action".
- Tap "Audit Trail" (Reflected in **A**)

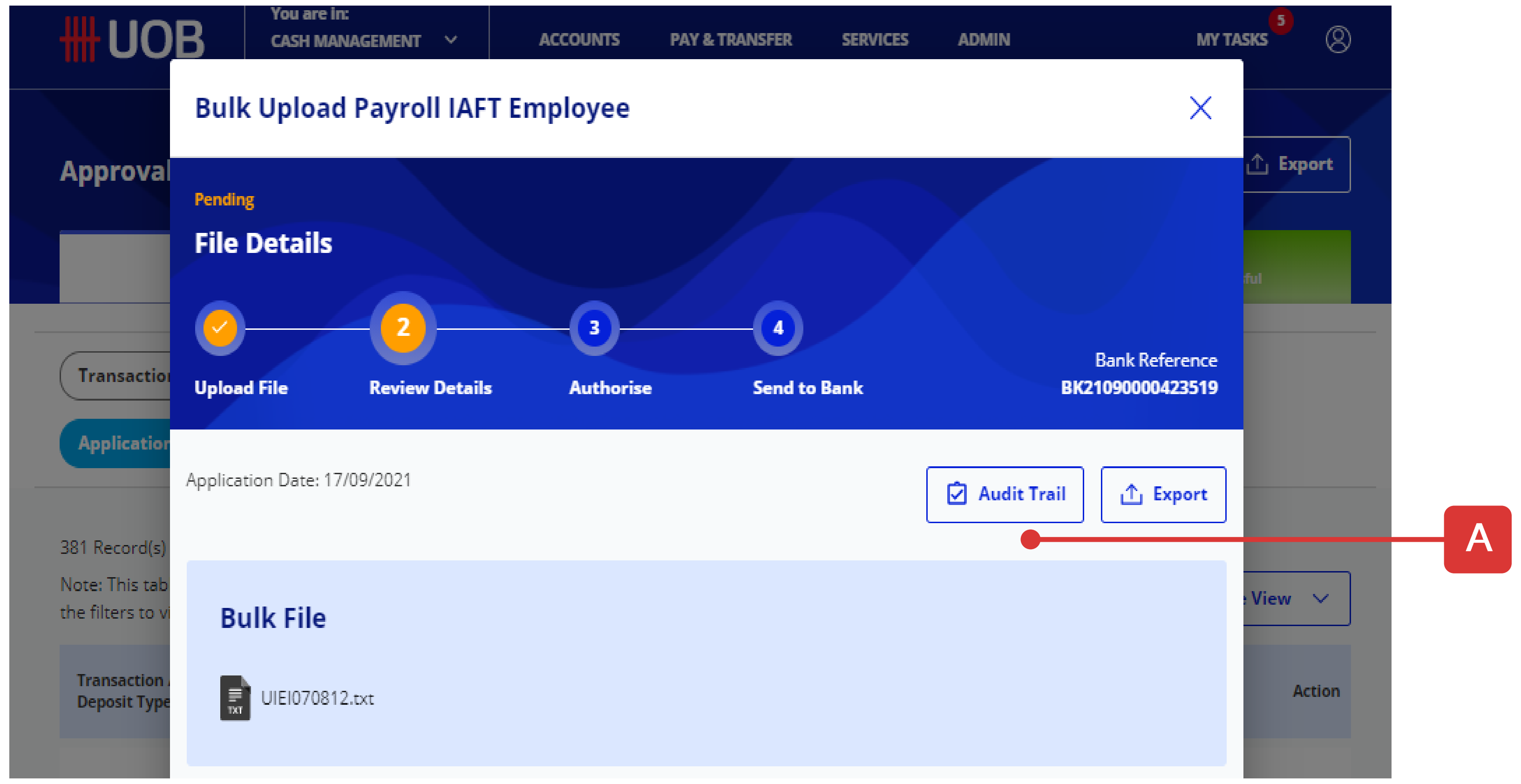
All end points would be reflected in **(B)**:
View your Audit Trail Details that will appear in a pop up.

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

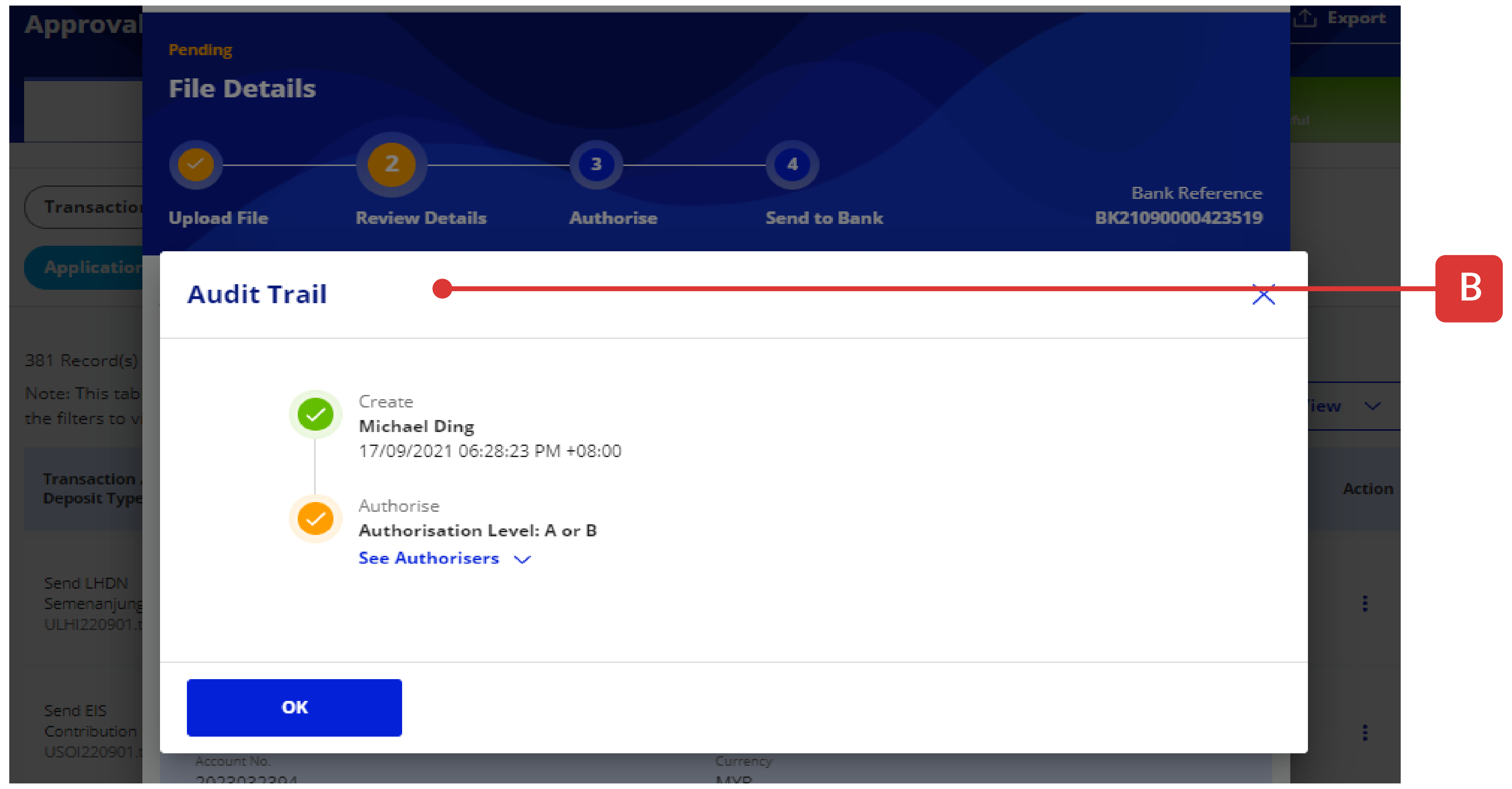
Approval Status (Default View)



View Transaction Details



View Audit Trail



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

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How to Approve Your Transaction? (via Approval Status)

Option 1

Step 1

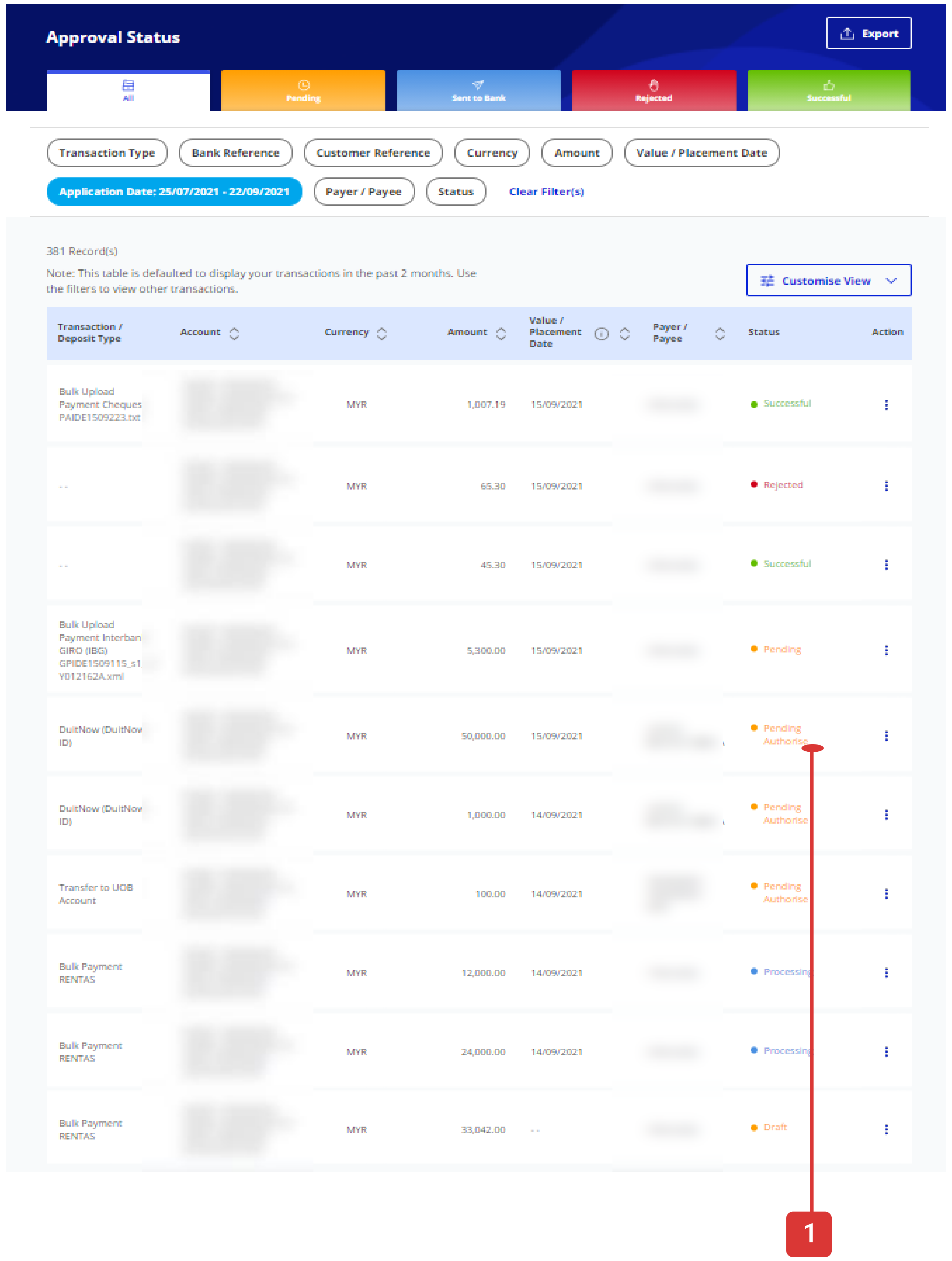
- Click on any part of the desired transaction row.

Step 2

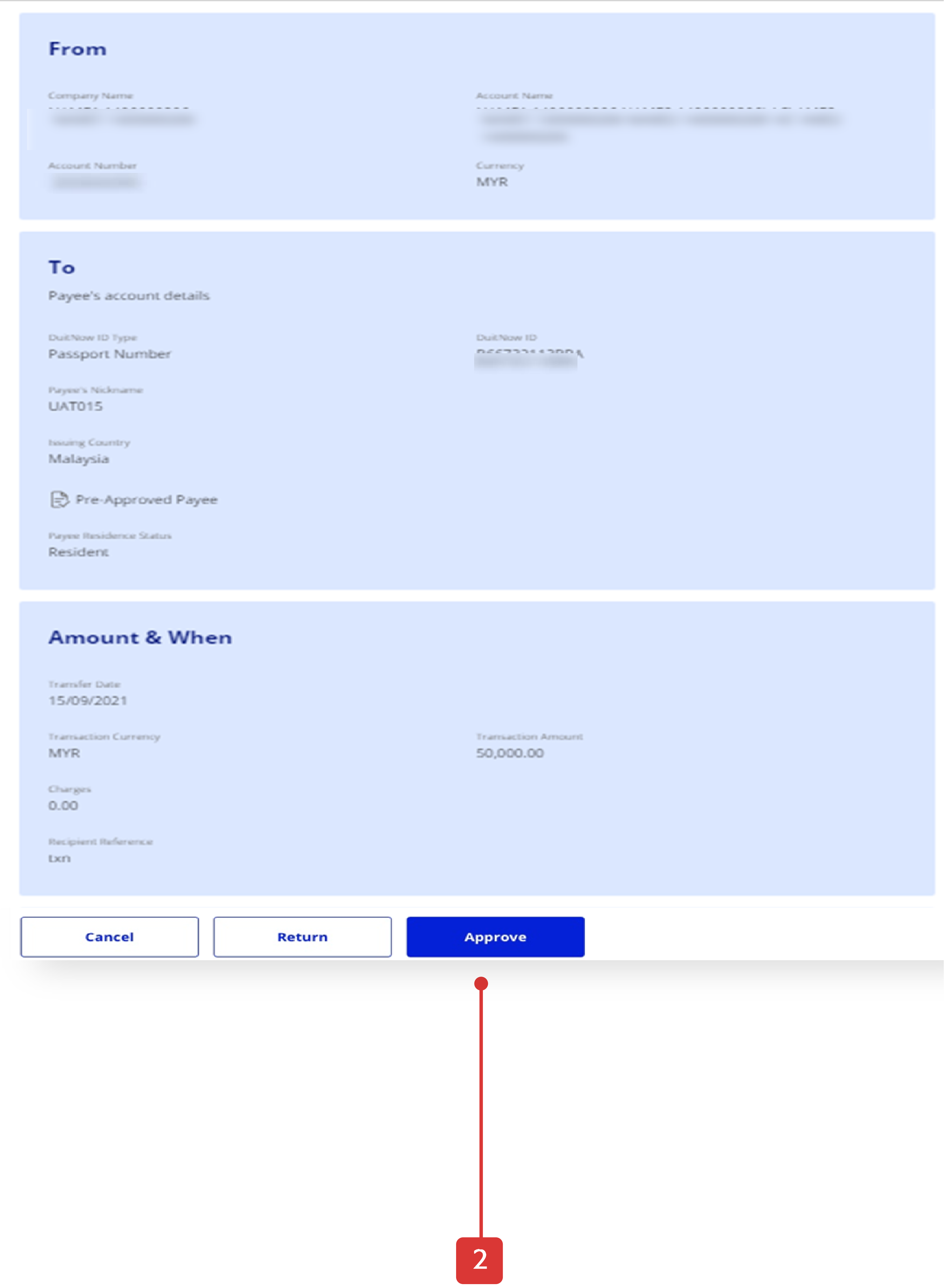
Selected transaction summary will appear in a pop up

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

Approval Status (Default View)



View Transaction Details



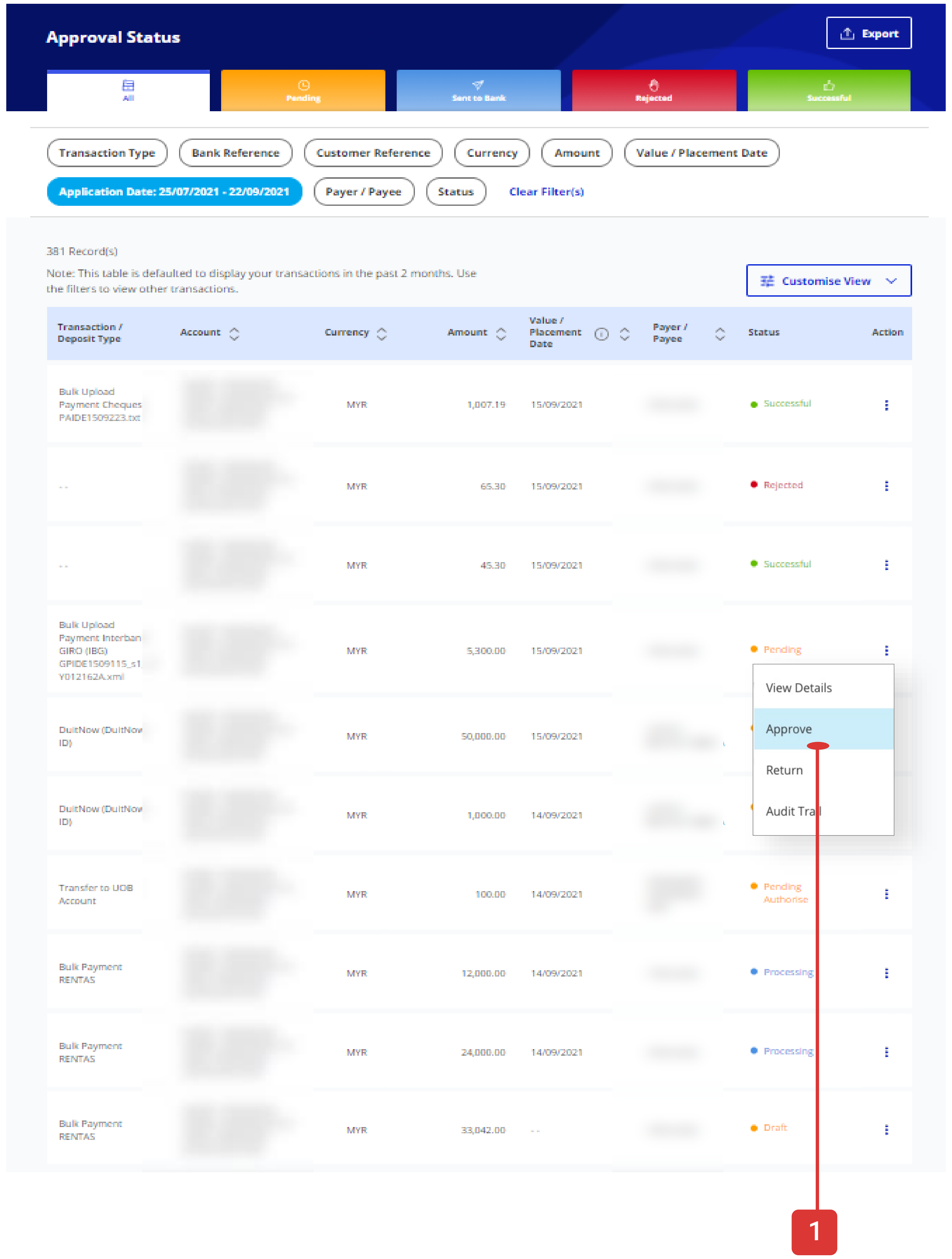
How to Approve Your Transaction? (via Approval Status)

Option 2

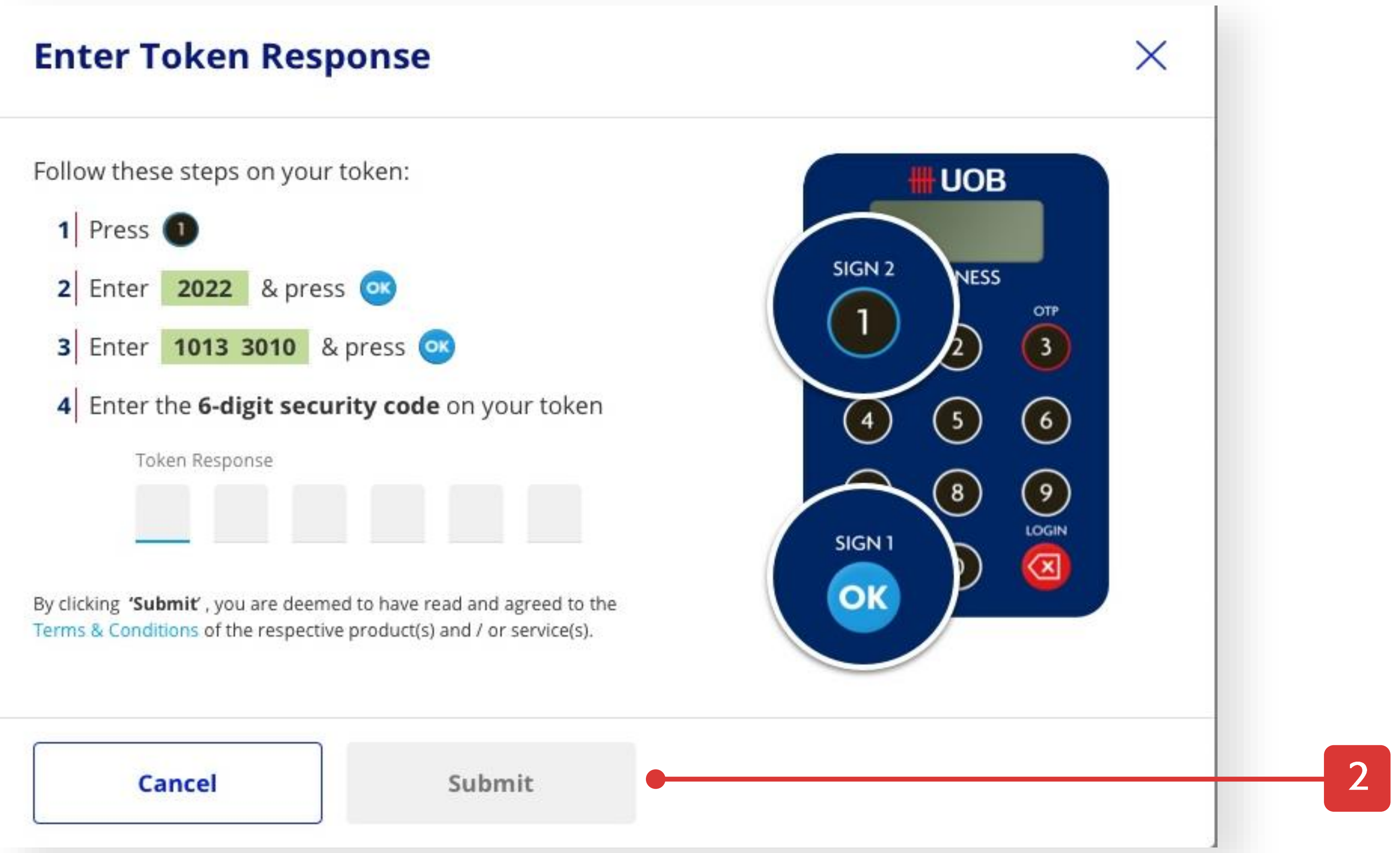
Step 1
- Click on the icon under "Action" menu.
- Tap on "Approve" in the expanded menu

Step 2
- Follow the on-screen instructions to authorise the request.

Approval Status (Default View)



Token Response



6. How to Return the Transaction to Maker

How to Return the Transaction to Maker?

Option 1

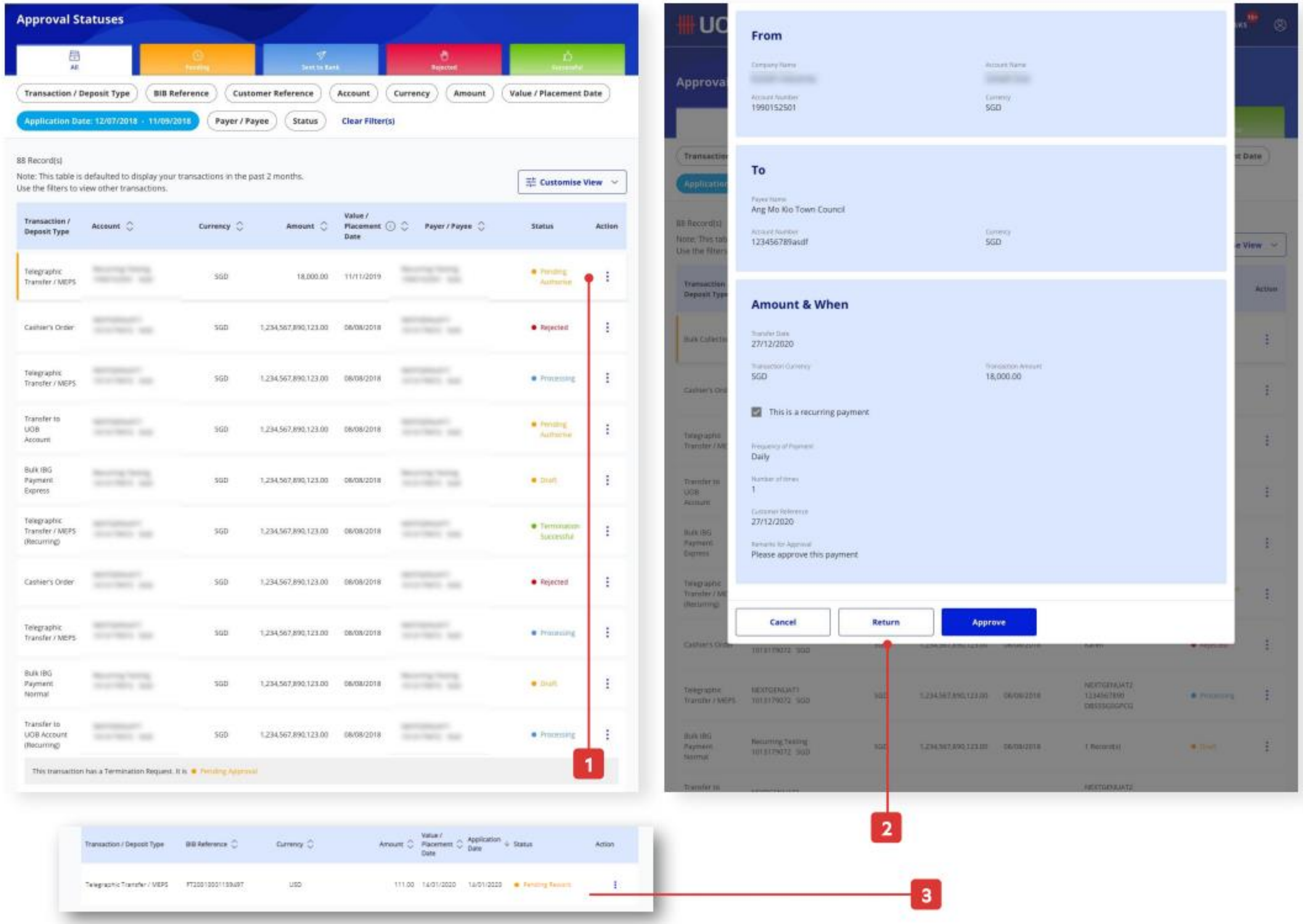
Step 1
- Click anywhere within the desire transaction row.

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)

View Transaction Details



How to Return the Transaction to Maker?

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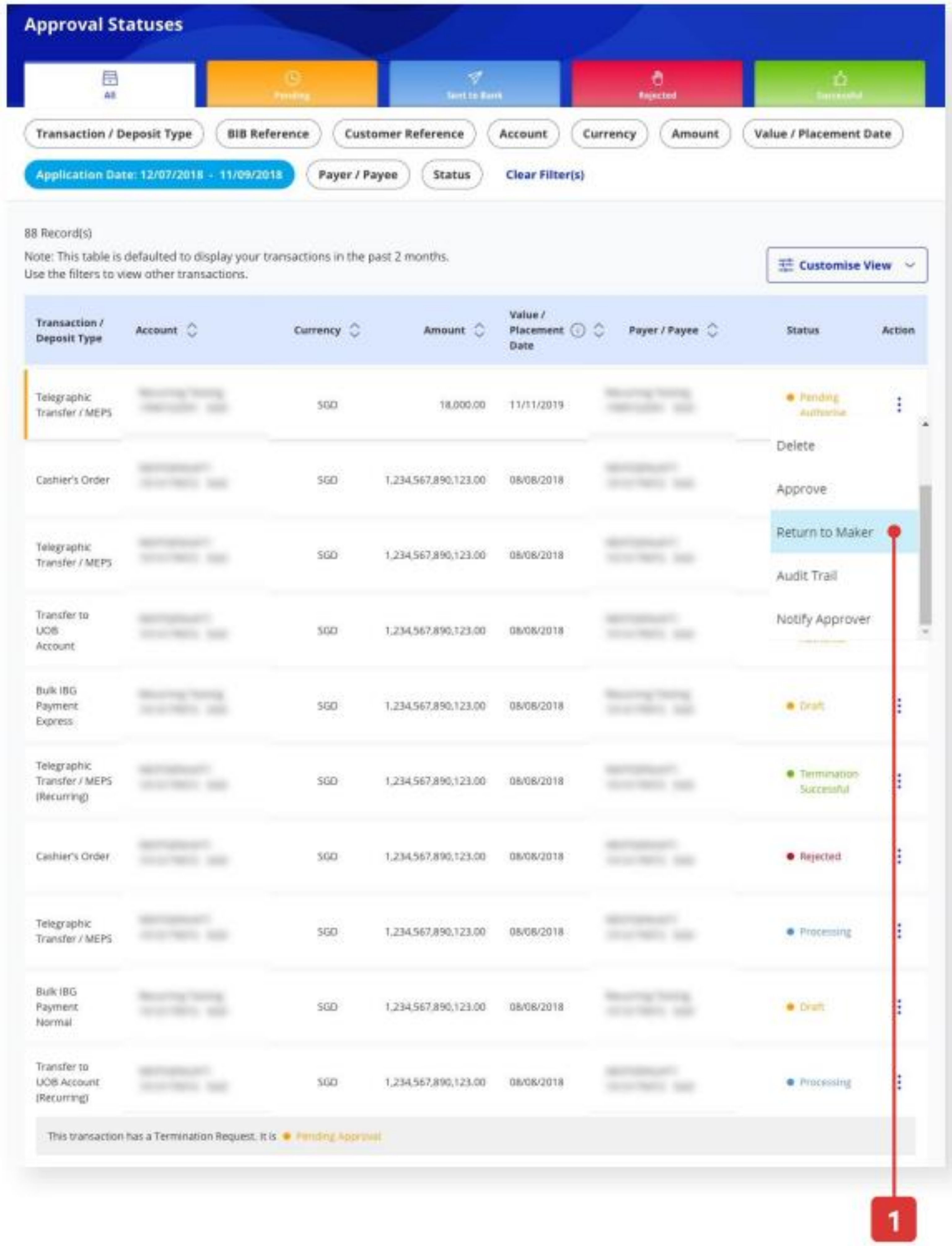
Option 2

Step 1
• Click on the icon under “Action” menu.

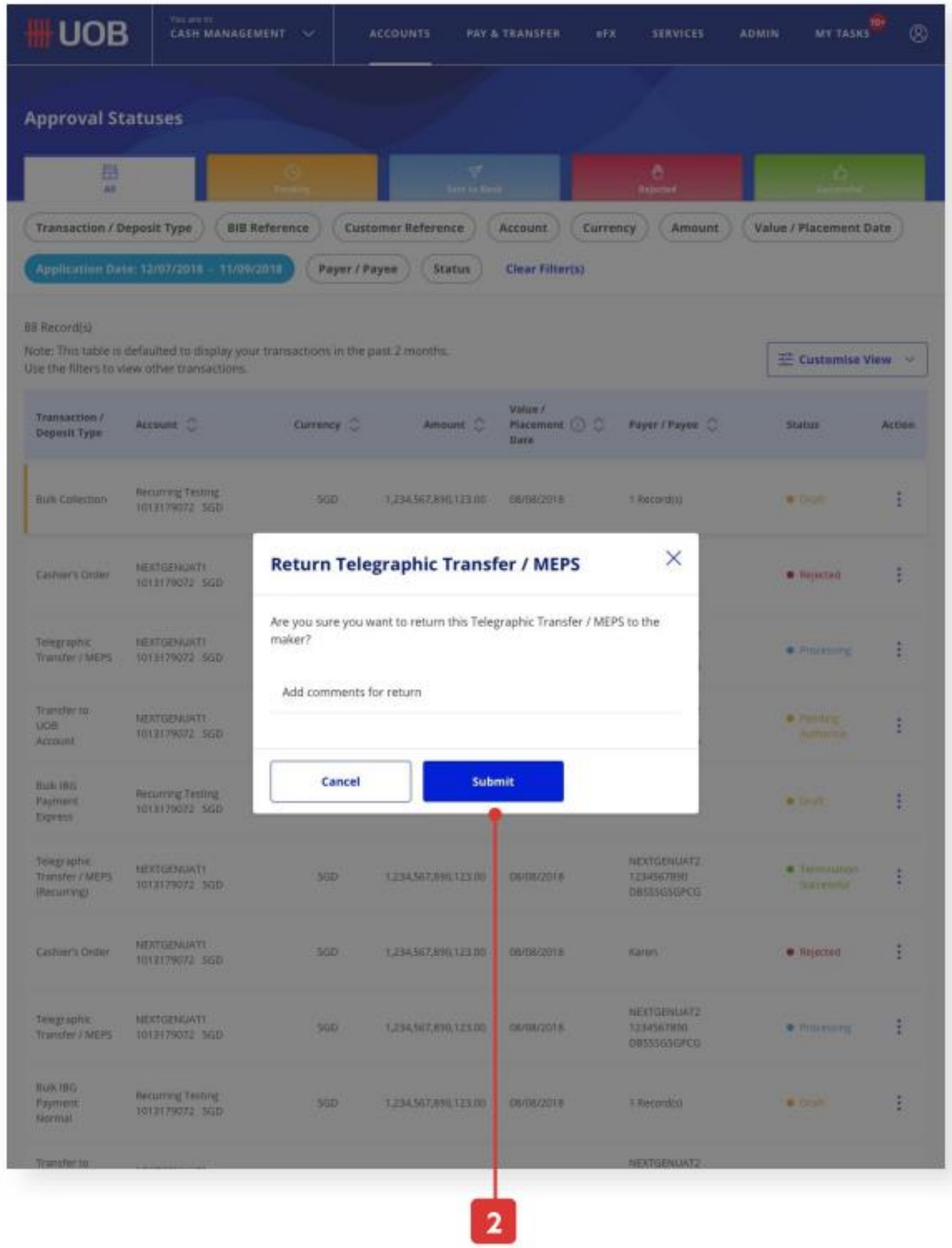
• Tap on “Return to Maker” in the expanded menu.

Step 2
• Click on “Submit” button in the dialog box.

Approval Status (Default View)



View Transaction Details



7. How to Edit a Pending Transaction

How to Edit a Pending Transaction

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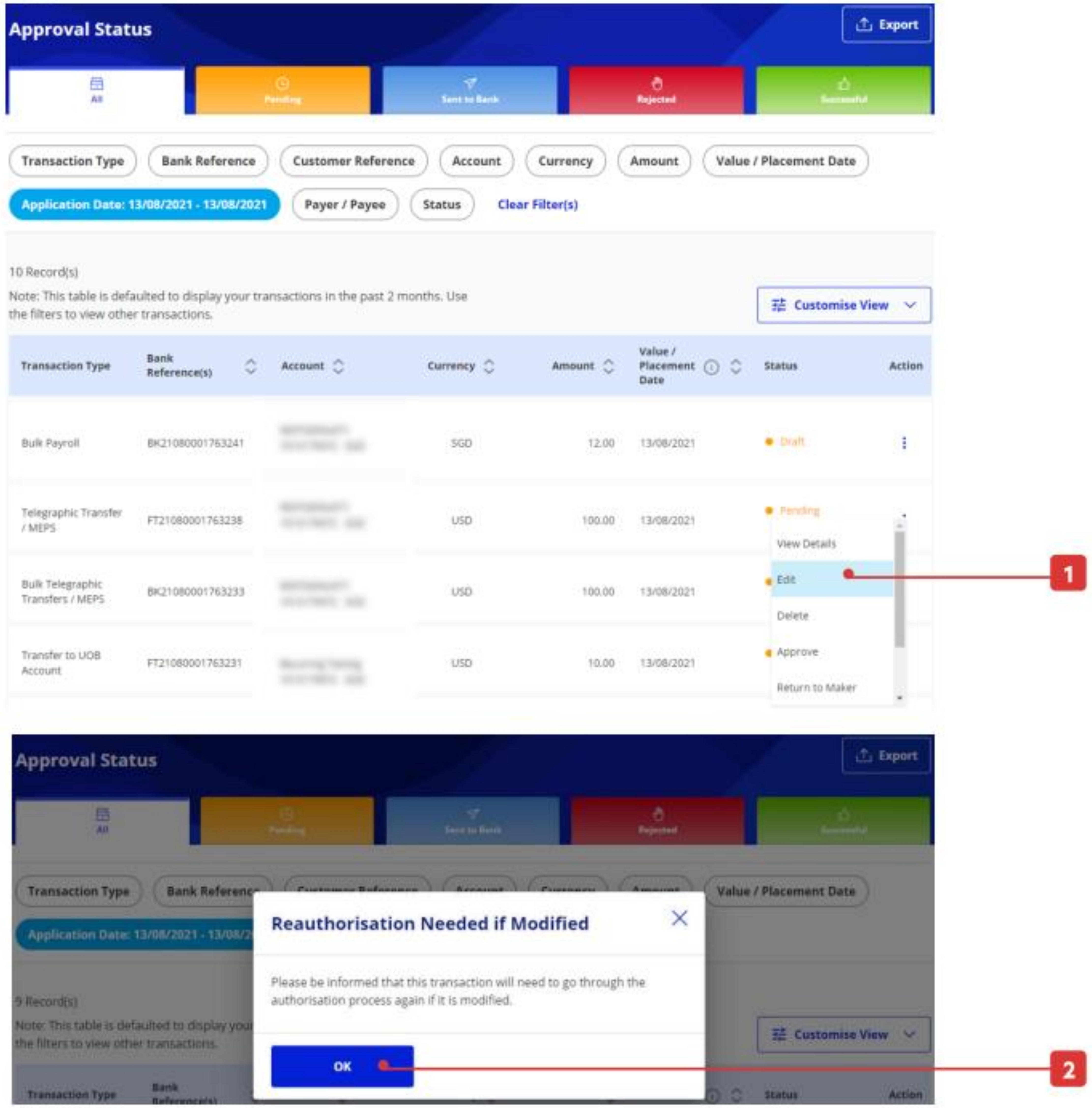
To edit a transaction under Pending Status

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)



8. How to Delete Transactions

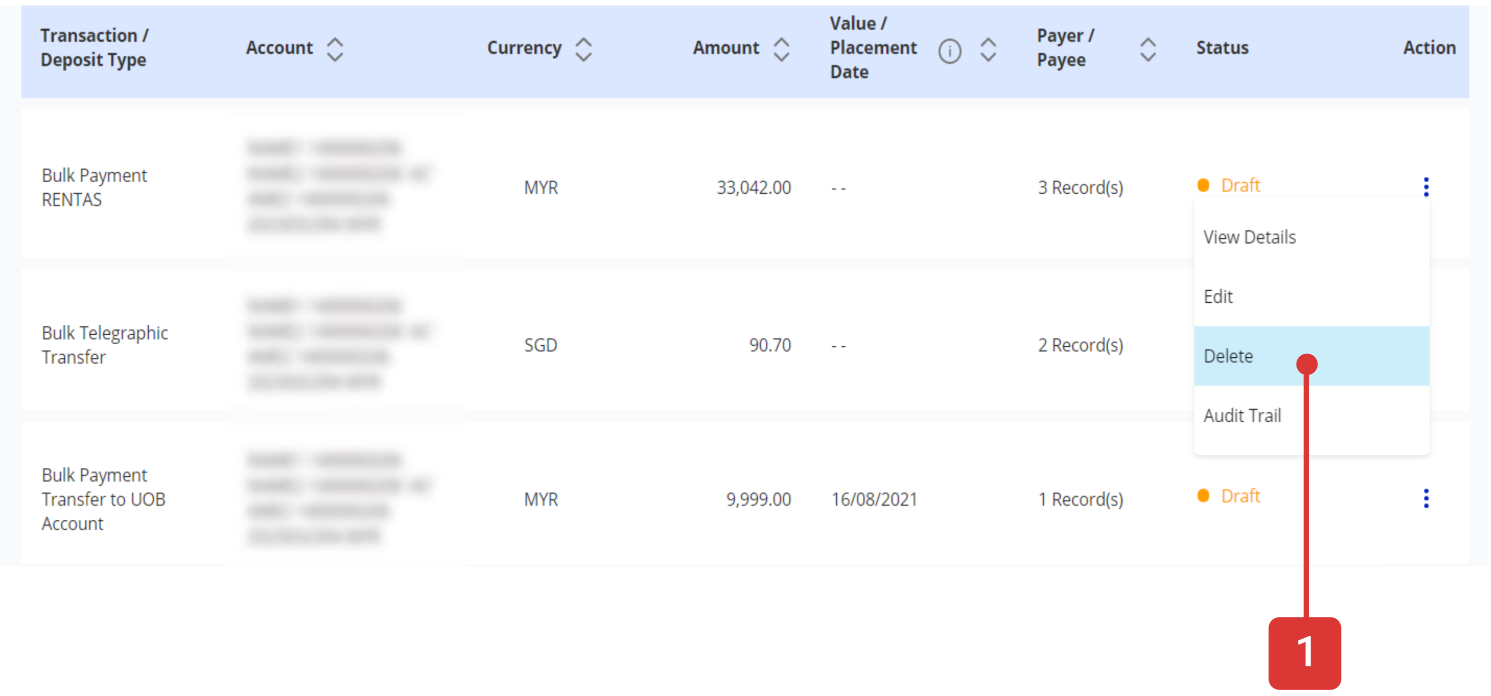
How to Delete Transactions

Single Deletion Method

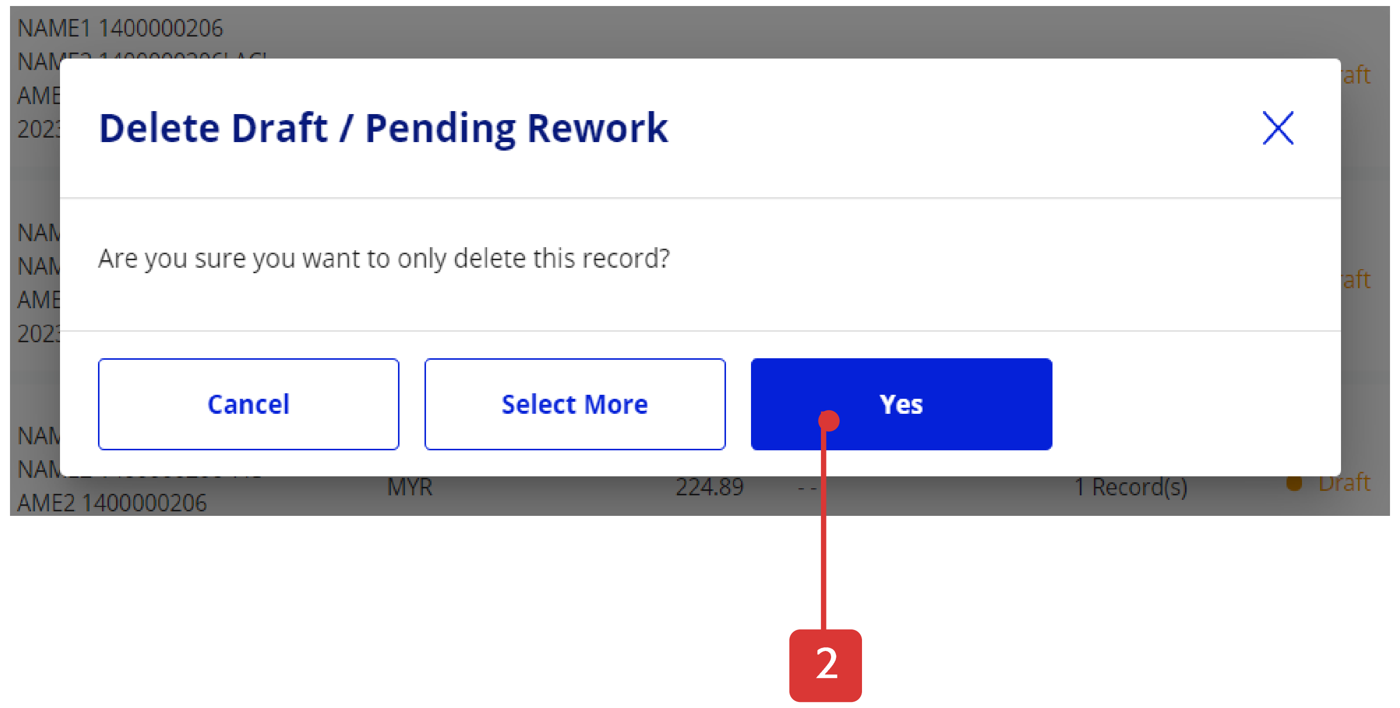
Step 1
- Click on the icon under “Action” menu.
- Tap on “Delete”

Step 2
- Click “Yes” in the modal to delete transaction.

Approval Status (Default View)



Delete Bulk Transaction Modal

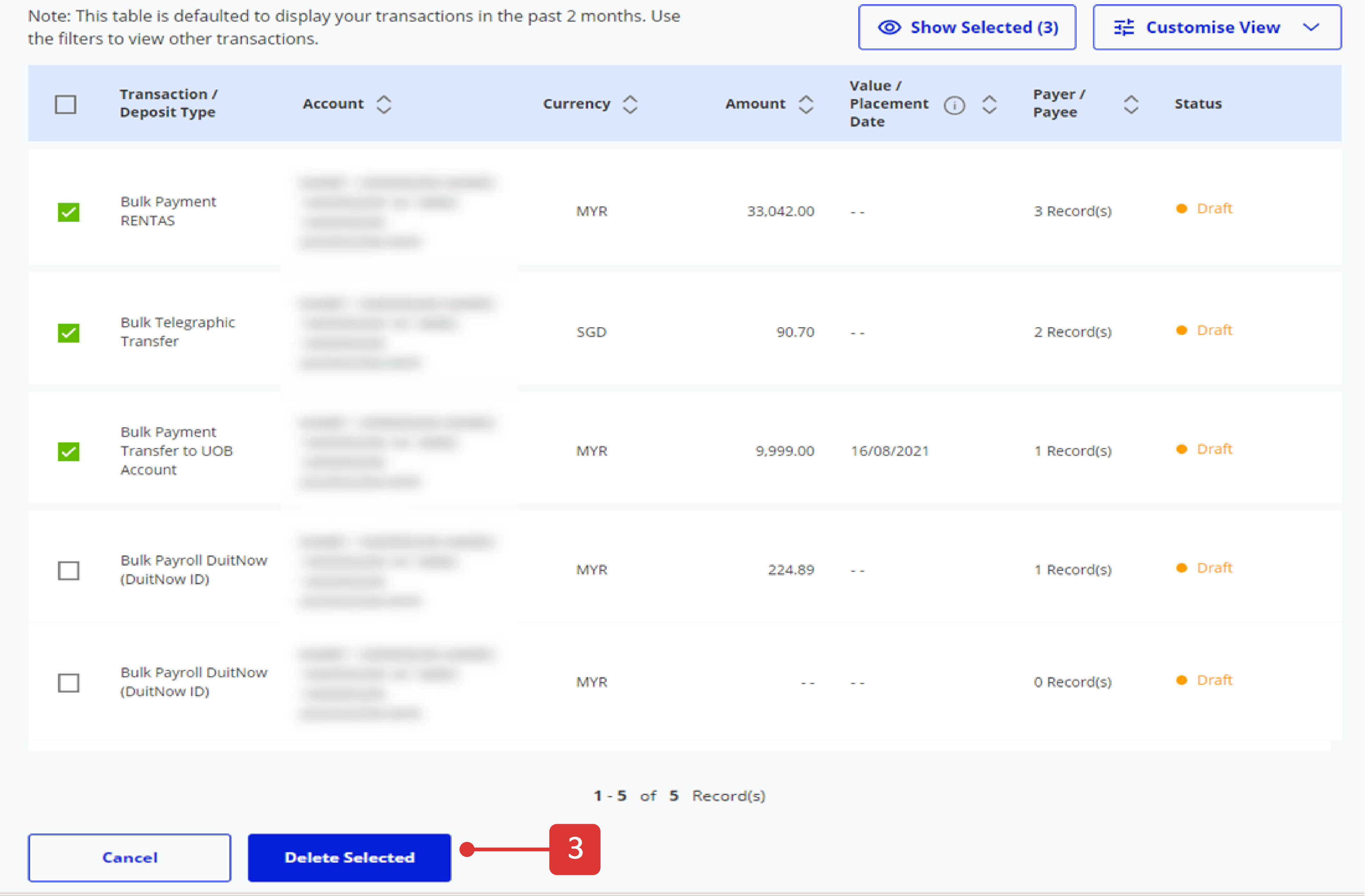


Multiple Deletion Method

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.



Right By You