

# INFINITY

# Panduan Pengguna



# Status Persetujuan

# Status Persetujuan

## Ikhtisar

---

- 1 Cara Mengakses Status Persetujuan
- 2 Ikhtisar Status Persetujuan
- 3 Cara Melihat Detail Transaksi
- 4 Cara Melihat Jejak Audit
- 5 Cara Menyetujui Transaksi Anda melalui Status Persetujuan
- 6 Cara Mengembalikan Transaksi ke Pembuat
- 7 Cara Mengedit Transaksi Tertunda
- 8 Cara Menghapus Transaksi

# Cara Mengakses Status Persetujuan

## Perbedaan Cara Akses Status Persetujuan

### Titik masuk 1

Arahkan kursor ke "Akun" di bilah navigasi dan pilih "Persetujuan Status" (di bawah "Status").

### Titik masuk 2

Di bawah widget Status Persetujuan Dasbor, ketuk "Lihat Semua".

### Titik masuk 3

Di bawah widget Status Persetujuan Dasbor, ketuk "Lihat Semua Transaksi".

Tampilan menu global (diperluas)

The screenshot shows the UOB mobile app interface. At the top, there is a navigation bar with the UOB logo and several menu items: 'You are in: CASH MANAGEMENT', 'ACCOUNTS', 'PAY & TRANSFER', 'SERVICES', and 'ADMIN'. Below this, there is a 'STATUS' section with a red circle and the number '1' pointing to the 'Approval Status' option. The main content area displays various account balances and transaction lists. At the bottom, there are two widgets: 'Approval Status' and 'My Tasks'. The 'Approval Status' widget shows a list of transactions with filters for 'All', 'Pending', 'Sent to Bank', 'Rejected', and 'Successful'. The 'My Tasks' widget shows a list of tasks with filters for '10+ Trxn(s)', '0 Batch(es)', '10+ Service(s)', and '0 Admin'.

Status Persetujuan Tampilan Default

The screenshot shows the 'Approval Status' screen in the UOB mobile app. At the top, there is a navigation bar with the UOB logo and several menu items: 'You are in: CASH MANAGEMENT', 'ACCOUNTS', 'PAY & TRANSFER', 'SERVICES', and 'ADMIN'. Below this, there is a 'STATUS' section with a red circle and the number '2' pointing to the 'Approval Status' option. The main content area displays various account balances and transaction lists. At the bottom, there are two widgets: 'Approval Status' and 'My Tasks'. The 'Approval Status' widget shows a list of transactions with filters for 'All', 'Pending', 'Sent to Bank', 'Rejected', and 'Successful'. The 'My Tasks' widget shows a list of tasks with filters for '10+ Trxn(s)', '0 Batch(es)', '10+ Service(s)', and '0 Admin'.

3

4

# Ikhtisar Status Persetujuan

## Panduan Cepat

### 1. Tab Beralih

Klik pada tab untuk beralih antara status transaksi “Semua”, “Tertunda”, “Ter kirim ke Bank”, “Ditolak”, dan “Berhasil”. Penjelasan masing-masing status akan dijelaskan di halaman selanjutnya.

### 2. Opsi Filter

Anda dapat menyesuaikan konten tabel agar sesuai dengan kebutuhan tampilan Anda dengan memanfaatkan opsi filter.

### 3. Urutkan Opsi

Anda dapat mengurutkan transaksi dalam urutan menaik atau menurun menggunakan tombol ini.

### 4. Hapus Filter

Tombol ini akan menghapus filter terpilih yang ada.

### 5. Sesuaikan Opsi

Tampilan ini memungkinkan Anda untuk menyesuaikan tampilan tipe konten dalam tabel.

### 6. Aksi

Ini memungkinkan Anda untuk melihat dan mengakses opsi yang dapat ditindaklanjuti khusus untuk transaksi yang dilihat.





### Status Persetujuan (Tampilan Default)

The screenshot shows the UOB 'Approval Status' page. At the top, there's a navigation bar with 'UOB' logo, 'You are in: CASH MANAGEMENT', and tabs for 'ACCOUNTS', 'PAY & TRANSFER', 'SERVICES', and 'ADMIN'. A 'MY TASKS' button with a notification badge '9' is on the right. Below the navigation is a 'Approval Status' header with an 'Export' button. A row of five status tabs is visible: 'All' (white), 'Pending' (orange), 'Sent to Bank' (blue), 'Rejected' (red), and 'Successful' (green). Below the tabs are filter buttons for 'Transaction Type', 'Bank Reference', 'Customer Reference', 'Account', 'Currency', 'Amount', and 'Value / Placement Date'. A date range filter 'Application Date: 20/02/2022 - 20/04/2022' is active, along with 'Payer / Payee', 'Status', and 'Clear Filter(s)' buttons. A 'Customise View' button is in the top right of the table area. The table shows 140 records with columns: Transaction Type, Bank Reference(s), Account, Currency, Amount, Value / Placement Date, Status, and Action. Two rows are visible: 'Bulk State Revenue Payment' (Draft) and 'Transfer to UOB Account' (Pending Authorise).

Transaction Type	Bank Reference(s)	Account	Currency	Amount	Value / Placement Date	Status	Action
Bulk State Revenue Payment	BK22040009471162		IDR	--	19/04/2022	Draft	
Transfer to UOB Account	FT22040009418485		IDR	10,000	12/04/2022	Pending Authorise	

# Ikhtisar Status Persetujuan

## Pemetaan Status Transaksi

Status Transaksi UOB Infinity	Deskripsi	
Draft	Transaksi DISIMPAN oleh pengguna	
Verifikasi Tertunda	Transaksi DIKIRIM untuk otorisasi lebih lanjut sesuai dengan matriks otorisasi Anda	
Otorisasi Tertunda	Transaksi DIKIRIM untuk otorisasi lebih lanjut sesuai dengan matriks otorisasi Anda	
Pengiriman Tertunda	Transaksi yang telah diotorisasi masih belum dikirimkan ke Bank	
Pengerjaan Ulang Tertunda	Transaksi DIKEMBALIKAN kepada Pembuat untuk diubah dan diajukan kembali	
Pengolahan	Transaksi diserahkan ke Bank untuk DIPROSES	
Pengolahan	Transaksi lewat tanggal diserahkan ke Bank untuk DIPROSES	
Berhasil	Transaksi telah DIPROSES oleh Bank	
Ditolak	Transaksi telah DITOLAK oleh Bank	
Ditolak Sebagian	Satu atau lebih catatan dalam transaksi massal ditolak/ditolak.	

# Cara Melihat Detail Transaksi

## Semua Pilihan

### Pilihan 1

- Klik pada bagian mana pun dari baris transaksi yang diinginkan

### Pilihan 2

- Klik pada ikon di bawah "Tindakan"

### Pilihan 3

- Klik ikon di bawah "Tindakan", Ketuk "Lihat Detail"

Semua titik akhir akan tercermin dalam (A): Rincian transaksi akan muncul dalam pop up.

## Opsi Ekspor

Tombol "Ekspor" terletak di kanan atas rincian transaksi, di samping tombol "Jejak Audit" (B).

Anda dapat mengekspor satu transaksi sebagai:

- PDF
- PDF dengan Jejak Audit\*

Anda dapat mengekspor transaksi massal sebagai:

- PDF\*
- PDF dengan Detail Transaksi\*
- CSV\* \*

\*Catatan: Jika Anda memilih opsi ekspor ini, Anda akan dapat menerima email untuk memberi tahu Anda bahwa file yang diekspor telah siap untuk diunduh. Setelah siap, Anda harus pergi ke "Akun" di bilah menu atas, pilih "Unduh Laporan" dan buka "Pengguna Dihasilkan" untuk mengunduh file yang diekspor.

### Dasbor (Tampilan Default)

The dashboard is divided into two main sections: "Approval Status" and "My Tasks".

**Approval Status:** Shows a summary of transactions in the past 2 months. It includes a "View All" button and a filter bar with options: All, Pending, Sent to Bank, Rejected, Successful. A red box labeled "1" points to the "Draft: Bulk State Revenue Payment" entry.

**My Tasks:** Shows tasks that require attention. It includes a "View All" button and a filter bar with options: 7 Txn(s), 1 Batch(es), 1 Service(s), 0 Admin. A red box labeled "1" points to the "Pending" section.

Transaction details for "Draft: Bulk State Revenue Payment":

To	From
0 RECORDS	INTERNAL1

Amount: --, Bank Reference: BK22040009471162

### Status Persetujuan (Tampilan Default)

The "Approval Status" page shows a table of transactions with columns: Transaction / Deposit Type, Account, Currency, Amount, Value / Placement Date, Payer / Payee, Status, and Action. A red box labeled "2" points to the "Status" column. A red box labeled "3" points to the "View Details" button in the "Action" column.

Transaction details for "Bulk State Revenue Payment":

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Bulk State Revenue Payment		IDR	--	0 Record(s)		Successful	View Details

### View Transaction Details

The "View Transaction Details" page shows a pop-up window for "Transfer to UOB Account". The window has a "Successful" status and a progress bar with steps: Enter Details, Authorise, and Send to Bank. A red box labeled "A" points to the "View Details" button in the background. A red box labeled "B" points to the "Export" button in the pop-up window.

Transaction details for "Transfer to UOB Account":

Transaction Type
View Standard Transaction Fees.

# Cara Melihat Jejak Audit

## Semua Pilihan

### Pilihan 1

- Klik pada bagian mana pun dari baris transaksi yang diinginkan.
- Pilih “Jejak Audit” (Tercermin di A)

### Pilihan 2

- Klik pada ikon di bawah "Tindakan"
- Ketuk “Jejak Audit” (Tercermin di A)”

Semua titik akhir akan tercermin di (B):

Lihat Detail Audit Trail Anda yang akan muncul di pop up.

Jika transaksi Anda menunggu persetujuan, Anda akan dapat melihat pemberi persetujuan berikutnya yang dapat menyetujui transaksi Anda.

### Approval Status (Default View)

Transaction Type	Account	Currency	Amount	Payer / Payee	Status	Action
Bulk State Revenue Payment		ITD	IDR	--	Draft	View Details Edit Delete Audit Trail
Transfer to UOB Account		ITD	IDR	10,000		
Online (ATM Switching)		ITD	IDR	112		
RTGS		ITD	IDR	100,000,001	Pending Authorise	
LLG		ITD	IDR	123	Pending Authorise	
Telegraphic Transfer		ITD	SGD	1.00	Pending Authorise	
Send eTax Payment File UMPI096204.txt		ITD	--	--	Pending Authorise	
Send eTax Payment File EtaxPVT19APR.txt		ITD	--	--	Processing	
Telegraphic Transfer		ITD	SGD	1.90	Pending Authorise	

### View Transaction Details

Transfer to UOB Account

Successful

Application

Enter Details Authorise Send to Bank

Application Date: 11/09/2019

BIB Reference FT1605000364472

Audit Trail Export

### View Audit Trail

Audit Trail

- Created by Susan Lim  
03:21:46 PM SGT on 28/04/2019
- Authorised by Vivian Cheng  
04:21:46 PM SGT on 28/04/2019
- Send View Eligible Authorisers (Authorisation Level: A - D)



# Bagaimana Menyetujui Transaksi Anda? (melalui Status Persetujuan)

## Pilihan 1

### Langkah 1

- Klik pada bagian mana pun dari baris transaksi yang diinginkan.

### Langkah 2

Ringkasan transaksi yang dipilih akan muncul dalam pop up

- Klik tombol “Setuju” di bagian bawah ringkasan transaksi.

### Approval Status (Default View)

Approval Statuses

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 State Revenue Payment		IDR	100,000,001	11/11/2019		Pending Authorise	
Transfer to UOB Account		IDR	1,234,567,890,123.00	08/08/2018		Rejected	
Online (ATM Switching)		IDR	10,000	08/08/2018		Processing	
RTGS		IDR	100,000,001	08/08/2018		Pending Authorise	
UG		IDR	100,000,001	08/08/2018		Draft	
Online (ATM Switching)		IDR	10,000	08/08/2018		Pending Authorise	
RTGS		IDR	100,000,001	08/08/2018		Processing	
UG		IDR	100,000,001	08/08/2018		Successful	

(Recurring)  
This transaction has a termination request. It is Pending Approval

### View Transaction Details

From  
Gulfstream Industries  
Account Number: 1990152501  
Currency: SGD

To  
Payee Name: Ang Mo Kio Town Council  
Account Number: 123456789asdf  
Currency: SGD

Amount & When  
Transfer Date: 27/12/2020  
Transaction 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

# Bagaimana Menyetujui Transaksi Anda? (melalui Status Persetujuan)

## Option 2

### Langkah 1

- Klik ikon di bawah menu "Tindakan".
- Ketuk "Setuju" di menu yang diperluas

### Langkah 2

- Ikuti petunjuk di layar untuk mengotorisasi permintaan.

### Approval Status (Default View)

Approval Statuses

All Pending Sent to Bank Rejected Successful

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
Bulk State Revenue Payment		IDR	100,000,001	11/11/2019		Pending Authorise	
Transfer to UOB Account		IDR	1,234,567,890,123.00	08/08/2018		Rejected	
Online (ATM) Saving		IDR	10,000	08/08/2018			View Details Edit Delete Approve Return to Maker
RTGS		IDR	100,000,001	08/08/2018			
UG		IDR	100,000,001	08/08/2018			
Online (ATM) Saving		IDR	10,000	08/08/2018		Pending Authorise	
RTGS		IDR	100,000,001	08/08/2018		Processing	
UG		IDR	100,000,001	08/08/2018		Successful	
(Recurring)							

This transaction has a confirmation request. It is Pending Approval

### 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 products and / or services.

Cancel Submit

1

2

# Cara Mengembalikan Transaksi ke Pembuat

## Pilihan 1

### Langkah 1

- Klik di mana saja dalam baris transaksi yang diinginkan.

### Langkah 2

- Ketuk tombol “Kembali” di bagian bawah transaksi ringkasan.

### Langkah 3

- Status akan ditampilkan sebagai “Pengerjaan Ulang Tertunda”.

### Approval Status (Default View)

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Bill Payments		IDR	100,000,001	11/11/2019		Pending Approval	
Transfer to UOB Account		IDR	1,234,567,890,123.00	08/08/2018		Rejected	
Direct Debit Setting		IDR	10,000	08/08/2018		Processing	
IBG		IDR	100,000,001	08/08/2018		Pending Approval	
US		IDR	100,000,001	08/08/2018		Draft	
Direct Debit Setting		IDR	10,000	08/08/2018		Pending Approval	
IBG		IDR	100,000,001	08/08/2018		Processing	
US		IDR	100,000,001	08/08/2018		Successful	

### View Transaction Details

**From**

Company Name  
Account Name  
Account Number 1990152501  
Currency SGD

**To**

Payee Name  
Ang Mo Kio Town Council  
Account Number 123456789asdf  
Currency SGD

**Amount & When**

Transfer Date 27/12/2020  
Transaction Amount 18,000.00  
Transaction Currency SGD

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	FT20010001159497	USD	111.00	14/01/2020	14/01/2020	Pending Rework	

# Cara Mengembalikan Transaksi ke Pembuat

## Pilihan 2

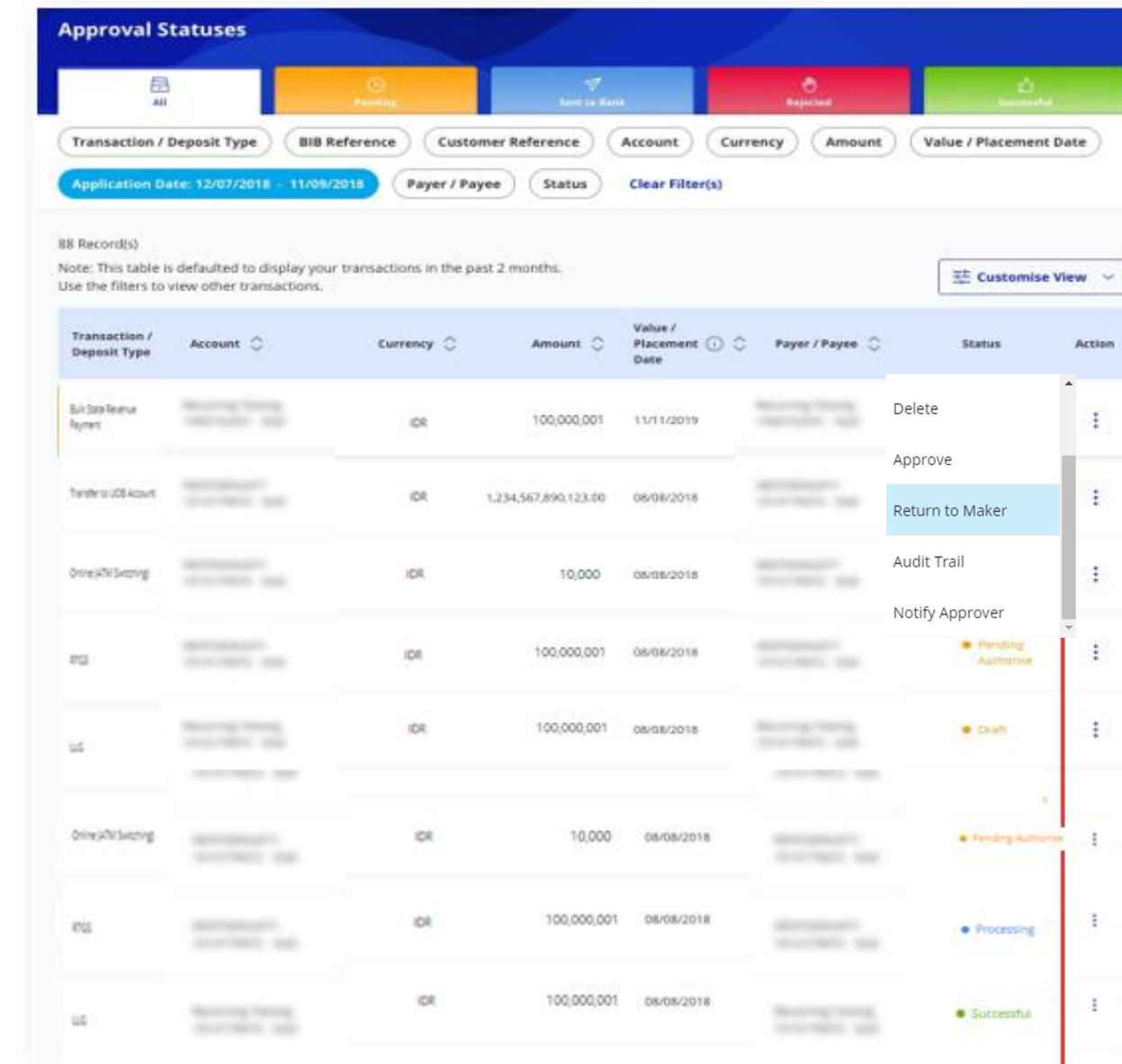
### Langkah 1

- Klik pada ikon di bawah menu "Tindakan"
- Ketuk "Kembali ke Pembuat" di menu yang diperluas

### Langkah 2

- Klik tombol "Kirim" di kotak dialog.

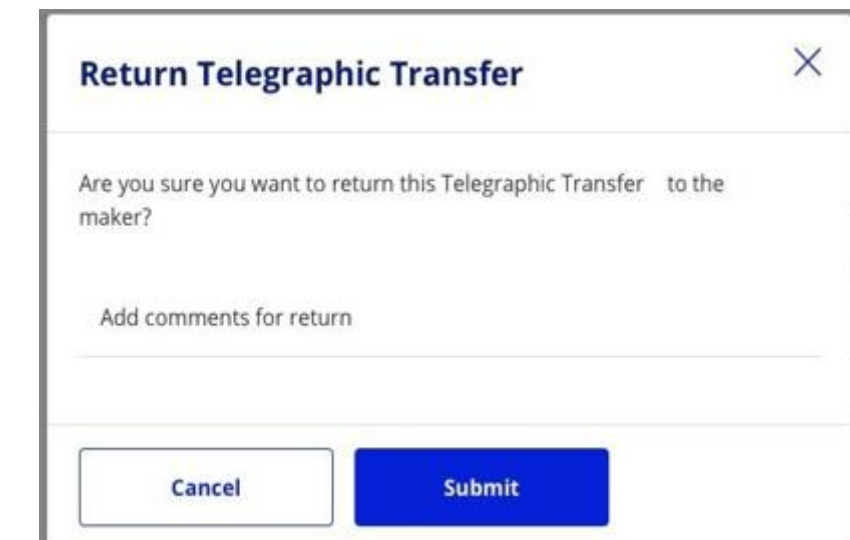
Approval Status (Default View)



The screenshot shows the 'Approval Status' interface. At the top, there are tabs for 'All', 'Pending', 'Sent to Bank', 'Rejected', and 'Successful'. Below the tabs are filter buttons for 'Transaction / Deposit Type', 'BIB Reference', 'Customer Reference', 'Account', 'Currency', 'Amount', and 'Value / Placement Date'. The main area displays a table of transactions with columns for Transaction / Deposit Type, Account, Currency, Amount, Value / Placement Date, Payer / Payee, Status, and Action. The 'Return to Maker' option is highlighted in the action menu for the second transaction.

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Bi-Directional Transfer		IDR	100,000,001	11/11/2019			Delete
Transfer to Bank		IDR	1,234,567,890,123.00	08/08/2018			Approve Return to Maker Audit Trail
Online Transfer		IDR	10,000	08/08/2018			Notify Approver
RTG		IDR	100,000,001	08/08/2018			Pending Approval
US		IDR	100,000,001	08/08/2018			Draft
Online Transfer		IDR	10,000	08/08/2018			Pending Approval
RTG		IDR	100,000,001	08/08/2018			Processing
US		IDR	100,000,001	08/08/2018			Successful

Return Transaction Modal



The screenshot shows a modal dialog box titled 'Return Telegraphic Transfer'. It contains a confirmation message: 'Are you sure you want to return this Telegraphic Transfer to the maker?'. Below the message is a text input field labeled 'Add comments for return'. At the bottom of the dialog are two buttons: 'Cancel' and 'Submit'.

1

2

# Cara Mengedit Transaksi Tertunda

Untuk mengedit transaksi di bawah status Tertunda

## Langkah 1

- Klik ikon di bawah menu "Tindakan".
- Ketuk "Edit"

## Langkah 2

- Klik "OK" di modal untuk melanjutkan pengeditan transaksi.

### Approval Status (Default View)

The screenshot shows the 'Approval Status' interface with a table of transactions. The table has columns for Transaction Type, Account, Currency, Amount, Payer / Payee, Status, and Action. A red arrow points to the 'Edit' button in the action menu for a transaction with status 'Pending Au'.

Transaction Type	Account	Currency	Amount	Payer / Payee	Status	Action
Bulk State Revenue Payment		IDR			Draft	⋮
Transfer to UOB Account		IDR	10,00		Pending Au	View Details Edit Delete Approve Return to Maker
Online (ATM Switching)		IDR	11		Pending Au	⋮
RTGS		IDR	100,000,00		Pending Authorise	⋮

The screenshot shows the 'Approval Status' interface with a modal dialog box titled 'Reauthorisation Needed if Modified'. The dialog box contains the text: 'Please be informed that this transaction will need to go through the authorisation process again if it is modified.' and an 'OK' button.

**Reauthorisation Needed if Modified**

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

OK

# Cara Menghapus Transaksi

## Metode Penghapusan Tunggal

### Langkah 1

- Klik ikon di bawah menu "Tindakan".
- Ketuk "Hapus"

### Langkah 2

- Klik "Ya" di modal untuk menghapus transaksi.

### Status Persetujuan (Tampilan Default)

The screenshot shows the 'Approval Status' interface with a table of transactions. The table has columns for Transaction Type, Account, Currency, Amount, Payer / Payee, Status, and Action. A red box highlights the 'Delete' option in the 'Action' column of the first row.

Transaction Type	Account	Currency	Amount	Payer / Payee	Status	Action
Bulk State Revenue Payment	R ANDIONA BOEDISOEJOTO 3273046338 IDR	IDR	--	0 Record(s)	Draft	View Details Delete
Transfer to UOB Account	R ANDIONA BOEDISOEJOTO 3273046338 IDR	IDR	10,000	QINGJIAN INTERNATIONAL 3273037177 IDR	Pending Rework	Edit
Online (ATM Switching)	R ANDIONA BOEDISOEJOTO 3273046338 IDR	IDR	112	NIKO 0700064565273 008	Pending Rework	Audit Trail

### Hapus Transaksi Modal Massal

The screenshot shows a modal dialog titled 'Delete Draft / Pending Rework' with the question 'Are you sure you want to only delete this record?'. The 'Yes' button is highlighted with a red box.

## Metode Penghapusan Berganda

### Langkah 1

- Klik ikon di bawah menu "Tindakan".
- Ketuk "Hapus"

### Langkah 2

- Klik "Select More" pada modal untuk menghapus transaksi.

### Langkah 3

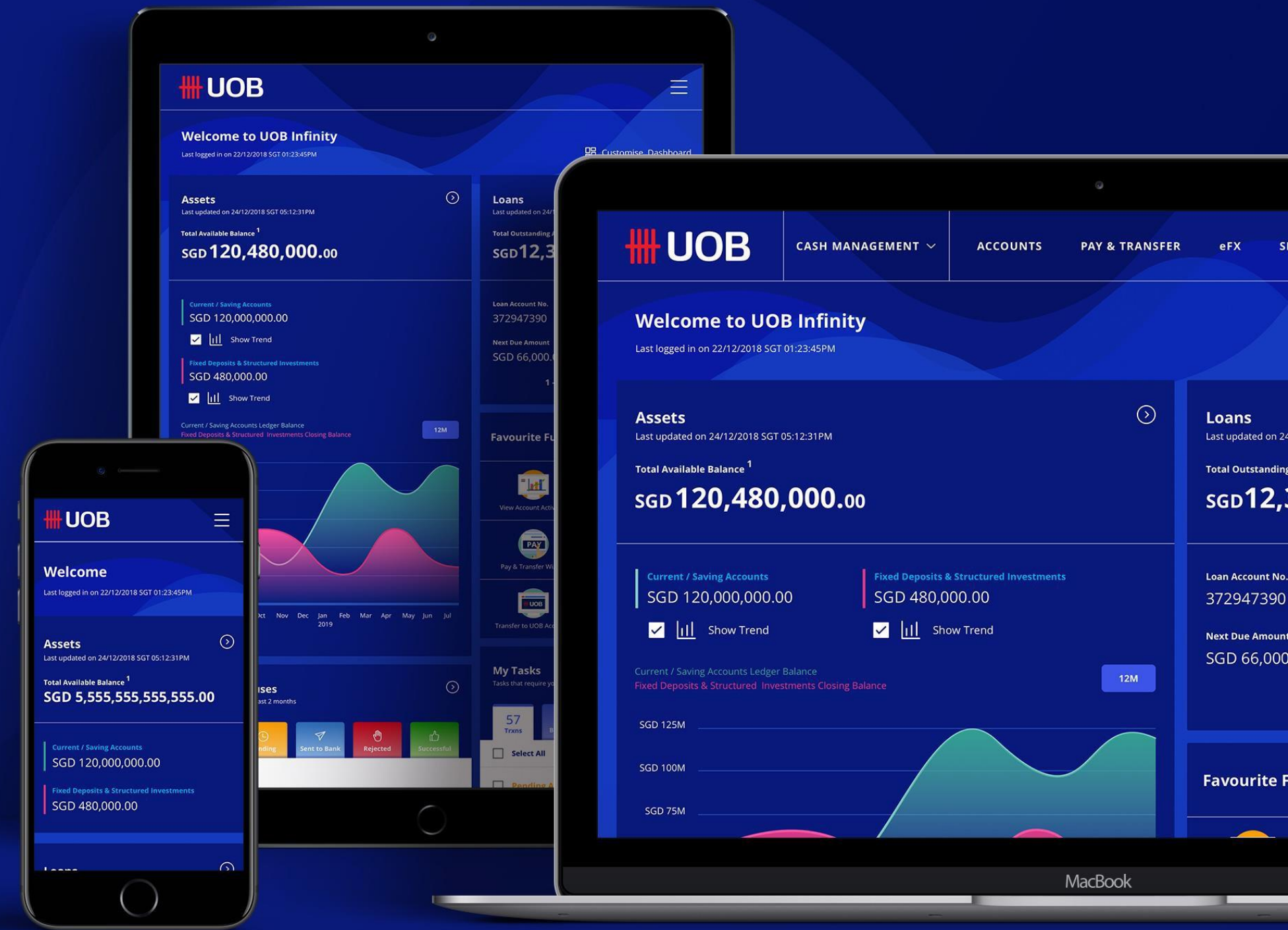
- Akan ada kolom baru dengan kotak centang bagi pengguna untuk mencentang transaksi mana yang akan dihapus. Klik "Hapus yang Dipilih" untuk mengonfirmasi penghapusan.

The screenshot shows the transaction table with checkboxes in the first column. The 'Delete Selected' button is highlighted with a red box.

<input type="checkbox"/>	Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status
<input checked="" type="checkbox"/>	Bulk Payroll	3523338070 test special character 3523338070 SGD	SGD	--	06/04/2020	0 Record(s)	Draft
<input checked="" type="checkbox"/>	Transfer to UOB Account	3523338062 TB SGD Account 1 3523338062 SGD	SGD	1,00	06/04/2020	01 ALVIN YAP PROD IAF 3523338070 SGD	Pending Rework
<input checked="" type="checkbox"/>	Bulk Cashier's Order	3523338062 TB SGD Account 1 3523338062 SGD	SGD	--	06/04/2020	0 Record(s)	Draft
<input type="checkbox"/>	Bulk Cheques	3523338070 test special character 3523338070 SGD	SGD	--	06/04/2020	0 Record(s)	Draft
<input type="checkbox"/>	Telegraphic Transfer / MEPS	3529036904 TRANSACTION BANKING USD ONE 3529036904 USD	MYR	1,000.00	07/04/2020	asd 123 UOVBMKXXXX	Draft

# 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 Transactions to Maker
- 7** How to Edit Pending Transaction
- 8** How to Delete Transactions

# 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”.

Global Menu (Expanded View)

The screenshot shows the UOB mobile app's global menu. At the top, there's a navigation bar with 'UOB' logo, 'You are in: CASH MANAGEMENT', and tabs for 'ACCOUNTS', 'PAY & TRANSFER', 'SERVICES', and 'ADMIN'. Below this, a 'STATUS' menu is expanded, showing options like 'ACCOUNTS', 'FIXED DEPOSITS', and 'Approval Status'. A red circle labeled '1' points to the 'Approval Status' option. The main dashboard area shows account balances (IDR 9,456,631), various service icons (LLG, Online ATM Switching, Pay & Transfer Wizard, RTGS, Transfer to UOB Accounts, View Account Activities), and two 'Approval Statuses' and 'My Tasks' widgets. The 'Approval Statuses' widget has a 'View All' button, and the 'My Tasks' widget has a 'View All' button. A red circle labeled '3' points to the 'View All' button in the 'My Tasks' widget.

Approval Status Default View

The screenshot shows the 'Approval Status' default view. At the top, there's a header with 'Approval Status' and a 'View All' button. Below this, there's a summary section with 'Your transactions in the past 2 months' and a list of transaction status filters: 'All', 'Pending', 'Sent to Bank', 'Rejected', and 'Successful'. The main content area shows a list of transactions. A red circle labeled '2' points to the 'View All' button in the top right corner. A red circle labeled '3' points to the 'View All' button in the 'My Tasks' widget on the right side of the screen.

# 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.

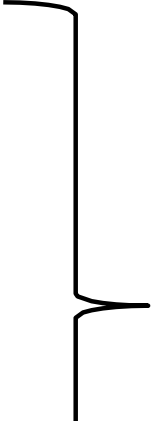



### Approval Status (Default View)

The screenshot shows the UOB 'Approval Status' page. At the top, there's a navigation bar with the UOB logo, 'You are in: CASH MANAGEMENT', and tabs for ACCOUNTS, PAY & TRANSFER, SERVICES, and ADMIN. A 'MY TASKS' button with a notification badge '9' is on the right. Below the navigation bar, the main heading is 'Approval Status' with an 'Export' button. A row of five status tabs is shown: 'All' (selected), 'Pending', 'Sent to Bank', 'Rejected', and 'Successful'. Below the tabs are filter buttons for Transaction Type, Bank Reference, Customer Reference, Account, Currency, Amount, and Value / Placement Date. A date range filter 'Application Date: 20/02/2022 - 20/04/2022' is active, along with 'Payer / Payee', 'Status', and 'Clear Filter(s)' buttons. A 'Customise View' button is in the top right of the table area. The table shows 140 records. The first two rows are: 'Bulk State Revenue Payment' (Draft) and 'Transfer to UOB Account' (Pending Authorise). Numbered callouts 1-6 point to the 'All' tab, the filter buttons, the date range filter, the 'Clear Filter(s)' button, the 'Customise View' button, and the action menu of the second row respectively.

Transaction Type	Bank Reference(s)	Account	Currency	Amount	Value / Placement Date	Status	Action
Bulk State Revenue Payment	BK22040009471162		IDR	--	19/04/2022	Draft	
Transfer to UOB Account	FT22040009418485		IDR	10,000	12/04/2022	Pending Authorise	

# Overview of Approval Status

## Transaction Status Mapping

UOB Infinity Transaction Status	Description	
Draft	Transaction is SAVED by user	 <b>Pending</b>
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	
Pengerjaan Ulang Tertunda	Transaction is RETURNED to Maker for amendment and re-submission	
Processing	Transaction is submitted to the Bank for PROCESSING	 <b>Sent to Bank</b>
Processing	Post-Dated transaction is submitted to the Bank for PROCESSING	
Successful	Transaction has been PROCESSED by the Bank	 <b>Successful</b>
Rejected	Transaction has been REJECTED by the Bank	 <b>Rejected</b>
Partial Rejected	One or more records in the bulk transactions is/are rejected.	

# 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 dashboard is split into two main sections: 'Approval Status' and 'My Tasks'. The 'Approval Status' section shows a list of transactions with filters for 'All', 'Pending', 'Sent to Bank', 'Rejected', and 'Successful'. A red box labeled '1' highlights the 'Draft: Bulk State Revenue Payment' transaction. The 'My Tasks' section shows a list of tasks with filters for 'To Do', 'In Progress', 'Completed', and 'Admin'. A red box labeled '2' highlights the 'Pending' filter in the 'Approval Status' section.

Approval Status (Default View)

The 'Approval Status' section shows a table of transactions with columns for 'Transaction / Deposit Type', 'Account', 'Currency', 'Amount', 'Value / Placement Date', 'Payer / Payee', 'Status', and 'Action'. A red box labeled '2' highlights the 'Pending' filter. A red box labeled '3' highlights the 'View Details' button in the 'Action' column.

View Transaction Details

The 'View Transaction Details' pop-up shows a transaction flow with steps: 'Enter Details', 'Authorise', and 'Send to Bank'. A red box labeled 'A' highlights the 'View Details' button. A red box labeled 'B' highlights the 'Export' button.

# 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)

Transaction Type	Account	Currency	Amount	Payer / Payee	Status	Action
Bulk State Revenue Payment		ITO	IDR	--	Draft	View Details, Edit, Delete, Audit Trail
Transfer to UOB Account		ITO	IDR	10,000		
Online (ATM Switching)		ITO	IDR	112		
RTGS		ITO	IDR	100,000,001	Pending Authorise	
LLG		ITO	IDR	123	Pending Authorise	
Telegraphic Transfer		ITO	SGD	1.00	Pending Authorise	
Send eTax Payment File UMPI096204.txt		ITO	--	--	Pending Authorise	
Send eTax Payment File EtaxPVT19APR.txt		ITO	--	--	Processing	
Telegraphic Transfer		ITO	SGD	1.90	Pending Authorise	

### View Transaction Details

**Transfer to UOB Account**

Successful

Application Date: 11/09/2019

BIB Reference: FT1605000364472

Buttons: Audit Trail, Export

### View Audit Trail

**Audit Trail**

- Created by **Susan Lim** on 03:21:46 PM SGT on 28/04/2019
- Authorised by **Vivian Cheng** on 04:21:46 PM SGT on 28/04/2019
- Send **View Eligible Authorisers** (Authorisation Level: A - D)

# 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)

Approval Statuses

All Pending Sent to Bank Rejected Successful

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 State Revenue Payment		IDR	100,000,001	11/11/2019		Pending Authorise	
Transfer to UOB Account		IDR	1,234,567,890,123.00	08/08/2018		Rejected	
Online (ATM Switching)		IDR	10,000	08/08/2018		Processing	
RTGS		IDR	100,000,001	08/08/2018		Pending Authorise	
UG		IDR	100,000,001	08/08/2018		Draft	
Online (ATM Switching)		IDR	10,000	08/08/2018		Pending Authorise	
RTGS		IDR	100,000,001	08/08/2018		Processing	
UG		IDR	100,000,001	08/08/2018		Successful	

(Recurring)  
This transaction has a termination request. It is Pending Approval

### View Transaction Details

From: GURAH INDUSTRIES  
Account Number: 1990152501  
Currency: SGD

To: Ang Mo Kio Town Council  
Account Number: 123456789asdf  
Currency: SGD

Amount & When  
Transfer Date: 27/12/2020  
Transaction 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

# 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 Statuses

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
Bulk State Revenue Payment		IDR	100,000,001	11/11/2019		Pending Authorise	⋮
Transfer to UOB Account		IDR	1,234,567,890,123.00	08/08/2018		Rejected	⋮
Online ATM Swiping		IDR	10,000	08/08/2018		View Details	⋮
RTGS		IDR	100,000,001	08/08/2018		Edit	⋮
UG		IDR	100,000,001	08/08/2018		Delete	⋮
Online ATM Swiping		IDR	10,000	08/08/2018		Approve	⋮
RTGS		IDR	100,000,001	08/08/2018		Return to Maker	⋮
UG		IDR	100,000,001	08/08/2018		Pending Authorise	⋮
RTGS		IDR	100,000,001	08/08/2018		Processing	⋮
UG		IDR	100,000,001	08/08/2018		Successful	⋮
(Recurring)						Pending Approval	⋮

### 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 products and / or services.

Cancel   Submit

1



# How to Return the Transaction to Maker

## Option 1

### Step 1

- Click anywhere within the desired transaction row.

### Step 2

- Tap on "Return" button at the bottom of the transaction summary.

### Step 3

- Status will be shown as as "Pending Rework".

### Approval Status (Default View)

Approval Statuses

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

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 Recurring Payment		IDR	100,000,001	11/11/2019		Pending Approval	1
Transfer to UOB Account		IDR	1,234,567,890,123.00	08/08/2018		Rejected	
Direct to Setting		IDR	10,000	08/08/2018		Processing	
IBG		IDR	100,000,001	08/08/2018		Pending Approval	
US		IDR	100,000,001	08/08/2018		Draft	
Direct to Setting		IDR	10,000	08/08/2018		Pending Approval	
IBG		IDR	100,000,001	08/08/2018		Processing	
US		IDR	100,000,001	08/08/2018		Successful	

This transaction has a Termination Request. It is Pending Approval

### View Transaction Details

From

Company Name: [Redacted] | Account Name: [Redacted]  
Account Number: 1990152501 | Currency: SGD

To

Payee Name: Ang Mo Kio Town Council  
Account Number: 123456789asdf | Currency: SGD

Amount & When

Transfer Date: 27/12/2020  
Transaction 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	FT20010001159497	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)

The screenshot shows the 'Approval Status' interface. At the top, there are tabs for 'All', 'Pending', 'Sent to Bank', 'Rejected', and 'Successful'. Below the tabs are filter buttons for 'Transaction / Deposit Type', 'BIB Reference', 'Customer Reference', 'Account', 'Currency', 'Amount', and 'Value / Placement Date'. A date range filter is set to 'Application Date: 12/07/2018 - 11/09/2018'. The main area contains a table with columns: Transaction / Deposit Type, Account, Currency, Amount, Value / Placement Date, Payer / Payee, Status, and Action. The 'Action' menu for the second row is expanded, showing options: Delete, Approve, Return to Maker (highlighted), Audit Trail, and Notify Approver. A red line connects the 'Return to Maker' option to the 'Return Transaction Modal' on the right.

Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status	Action
Bill to Bank		IDR	100,000,001	11/11/2019			Delete
Transfer to Bank		IDR	1,234,567,890,123.00	08/08/2018			Approve Return to Maker Audit Trail Notify Approver
Online Transfer		IDR	10,000	08/08/2018			Pending Approval
RTG		IDR	100,000,001	08/08/2018			Draft
Online Transfer		IDR	10,000	08/08/2018			Pending Approval
RTG		IDR	100,000,001	08/08/2018			Processing
US		IDR	100,000,001	08/08/2018			Successful

Return Transaction Modal

The screenshot shows a modal dialog box titled 'Return Telegraphic Transfer'. It contains a question: 'Are you sure you want to return this Telegraphic Transfer to the maker?'. Below the question is a text input field labeled 'Add comments for return'. At the bottom, there are two buttons: 'Cancel' and 'Submit'. A red line connects the 'Submit' button to the 'Return to Maker' option in the table on the left.

1

2

# 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 transaction.

### Approval Status (Default View)

The screenshot shows the 'Approval Status' dashboard with a table of transactions. The table has columns for Transaction Type, Account, Currency, Amount, Payer / Payee, Status, and Action. A red arrow points to the 'Edit' option in the action menu for a transaction with status 'Pending Au'.

Transaction Type	Account	Currency	Amount	Payer / Payee	Status	Action
Bulk State Revenue Payment		IDR			Draft	⋮
Transfer to UOB Account		IDR	10,00		Pending Au	View Details Edit Delete Approve
Online (ATM Switching)		IDR	11		Pending Au	Approve Return to Maker
RTGS		IDR	100,000,00		Pending Authorise	⋮

The screenshot shows the 'Approval Status' dashboard with a modal dialog box open. The modal contains the text 'Reauthorisation Needed if Modified' and an 'OK' button. A red arrow points to the 'OK' button.

**Reauthorisation Needed if Modified**

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

**OK**

# 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)

The screenshot shows the 'Approval Status' dashboard with a table of transactions. The table has columns for Transaction Type, Account, Currency, Amount, Payer / Payee, Status, and Action. A red circle labeled '1' points to the 'Delete' option in the action menu of a transaction row.

Transaction Type	Account	Currency	Amount	Payer / Payee	Status	Action
Bulk State Revenue Payment	R ANDIONA BOEDISOEJOTO 3273046338 IDR	IDR	--	0 Record(s)	Draft	View Details
Transfer to UOB Account	R ANDIONA BOEDISOEJOTO 3273046338 IDR	IDR	10,000	QINGJIAN INTERNATIONAL 3273037177 IDR	Pending	Edit
Online (ATM Switching)	R ANDIONA BOEDISOEJOTO 3273046338 IDR	IDR	112	NIKO 0700064565273 008	Pending	Audit Trail

### Delete Bulk Transaction Modal

The screenshot shows a modal dialog titled 'Delete Draft / Pending Rework'. The dialog asks 'Are you sure you want to only delete this record?' and has three buttons: 'Select More', 'Cancel', and 'Yes'. A red circle labeled '2' points to the 'Yes' button.

## 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.

The screenshot shows the transaction table with checkboxes for selection. A red circle labeled '3' points to the 'Delete Selected' button at the bottom.

<input type="checkbox"/>	Transaction / Deposit Type	Account	Currency	Amount	Value / Placement Date	Payer / Payee	Status
<input checked="" type="checkbox"/>	Bulk Payroll	3523338070 test special character 3523338070 SGD	SGD	--	06/04/2020	0 Record(s)	Draft
<input checked="" type="checkbox"/>	Transfer to UOB Account	3523338062 TB SGD Account 1 3523338062 SGD	SGD	1.00	06/04/2020	01 ALVIN YAP PROD IAFT 3523338070 SGD	Pending Rework
<input checked="" type="checkbox"/>	Bulk Cashier's Order	3523338062 TB SGD Account 1 3523338062 SGD	SGD	--	06/04/2020	0 Record(s)	Draft
<input type="checkbox"/>	Bulk Cheques	3523338070 test special character 3523338070 SGD	SGD	--	06/04/2020	0 Record(s)	Draft
<input type="checkbox"/>	Telegraphic Transfer / MEPS	3529036904 TRANSACTION BANKING USD ONE 3529036904 USD	MYR	1,000.00	07/04/2020	asd 123 UOVBMKXXXX	Draft

1 - 5 of 5 Record(s)



RIGHT BY YOU