

Flagging a transaction to send it back



A p-cardholder's supervisor or department head for a department card may flag a transaction that is pending their sign off to send it back for updates. You can also email Purchasing to flag the transactions for you.

1 Navigate to Works

The screenshot shows the Bank of America Works portal interface. At the top, there are navigation links for "Global Card Access" and "Works®", along with a "Go To Bank of America" link. The Bank of America logo is prominently displayed. Below the logo, there are user profile options for "Purchasing Approver" and utility icons for help, search, and notifications. The main content area is titled "Works" and includes sub-navigators for "Home", "Expenses", and "Reports". A "Transactions" dropdown menu is visible. The primary data section is "Action Purchase Requests", which contains a table with columns for "Receipts Action", "Acting As", "Count", and "Type".

Receipts Action	Acting As	Count	Type
Sign Off	Accountholder	26	Transaction
Sign Off	Approver	1	Transaction

Below this table is a pagination control showing "2 Items" and "Show 10 per page". To the right of the main content is a "My Announcements" section with a message about March transactions and a date of March 6, 2025.

The second data section is "Accounts Dashboard", which includes an "In Scope" filter and a table with columns for "Account Name", "Account ID", "Credit Limit", "Current Balance", "Available Spend", and "Available Credit".

Account Name	Account ID	Credit Limit	Current Balance	Available Spend	Available Credit
AMAZON	7844	50,000.00	2,186.41	47,813.59	47,813.59
DELL MARKETING	0253	200,000.00	5,116.49	194,883.51	194,883.51
JAGGAER PURCHASING	8137	100,000.00	0.00	100,000.00	100,000.00
OFFICE DEPOT	1862	25,000.00	1,032.32	24,031.57	23,967.68

Below this table is a pagination control showing "4 Items" and "Show 10 per page".

2 Click "Expenses"

Global Card Access Works® Go To Bank of America

BANK OF AMERICA Purchasing Approver

Works

Home **Expenses** Reports

Lewis-Clark State College

Action Purchase Requests Upload Receipts

Receipts Action	Acting As	Count	Type
Sign Off	Accountholder	26	Transaction
Sign Off	Approver	1	Transaction

2 Items Show 10 per page Page: 1 of 1

Accounts Dashboard

In Scope

Account Name	Account ID	Credit Limit	Current Balance	Available Spend	Available Credit
AMAZON	7844	50,000.00	2,186.41	47,813.59	47,813.59
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OFFICE DEPOT	1862	25,000.00	1,032.32	24,031.57	23,967.68

4 Items Show 10 per page Page: 1 of 1

My Announcements

The last workday to allocate and sign off on your March transactions is Friday, April 4th.
All transactions will be swept (automatically signed off on) at 12:01am on Sunday April 6th.

Posted by your Program Administrator, Jessica Waddington, on March 6, 2025.

3 Click "Transactions"

Global Card Access Works® Go To Bank of America

BANK OF AMERICA Purchasing Approver

Works

Home Expenses **Reports**

Lewis-Clark State College

Action Purchase Requests Upload Receipts

Receipts Action	Acting As	Count	Type
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2 Items Show 10 per page Page: 1 of 1

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4 Items Show 10 per page Page: 1 of 1

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4 Click "Approver"

Global Card Access Works® Go To Bank of America

BANK OF AMERICA Purchasing Approver

Works

Home Expenses Reports

Transactions **Accountholder** Approver

Upload Receipts

Acti	Purchase Requests	Receipts	Acting As	Count	Type
Sign Off			Accountholder	26	Transaction
Sign Off			Approver	1	Transaction

2 Items Show 10 per page Page: 1 of 1

Accounts Dashboard

In Scope

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5 On the Pending Sign off tab, adjust the date range if needed.

Global Card Access Works® Go To Bank of America

BANK OF AMERICA Purchasing Approver

Works

Home Expenses Reports

Expenses / Transactions / Approver

Lewis-Clark State College

Transactions - Approver

<< Pending Sign Off Signed Off Flagged All Clear Filters Columns

Advanced Filter

Date - 11/27/2024 - 03/07/2025 Retain settings

Document	Primary Accountholder	Account ID	Date Posted	Date Purchased	Purchase Amount	Vendor	Comp Val Auth	Allocation	A All
<input checked="" type="checkbox"/>	TXN00099225	Depot_Office	1862	03/03/2025	02/26/2025	63.89	ODP BUS SOL LLC # 101078	✓ ✓ ✓	10-10-918102-5-5720

1 Selected | 1 Item Show 10 per page Page: 1 of 1

6 Click "Month-to-Date"

The screenshot shows the Bank of America Works interface. A 'Select Dates' dialog box is open, displaying a calendar for February 2025. The 'Month-to-Date' radio button is selected and highlighted with a red circle. The dialog box also includes a date picker with MM (11), DD (27), and YY (2024) fields, and a list of radio button options: Custom, Month-to-Date, Cycle-to-Date, Year-to-Date, Selected Week, Selected Month, Selected Cycle, Today, Previous Week, Past 30 days, Previous Month, and Past days. The 'Apply to' dropdown is set to 'Date Posted'. The background shows the 'Transactions - Approver' section with an 'Advanced Filter' for the date range 11/27/2024 - 03/07/2025.

7 Click "OK"

The screenshot shows the Bank of America Works interface. The 'Select Dates' dialog box is open, and the 'Month-to-Date' radio button is selected. The 'OK' button is highlighted with a red circle. The background shows the 'Transactions - Approver' section with an 'Advanced Filter' for the date range 11/27/2024 - 03/07/2025.

8 Click Search

Global Card Access Works® Go To Bank of America

BANK OF AMERICA Purchasing Approver

Works

Home Expenses Reports

Expenses / Transactions / Approver Lewis-Clark State College

Transactions - Approver

<< Pending Sign Off Signed Off Flagged All Clear Filters Columns

Advanced Filter

Date - 03/01/2025 - 03/07/2025

03/01/2025 - 03/07/2025

Retain settings

Group - All

Account - All

Amount Range - All

Dispute Status - All

Account Status - All

Search Reset

<input type="checkbox"/>	Document	Primary Accountholder	Account ID	Date Posted	Date Purchased	Purchase Amount	Vendor	Comp Val Auth	Allocation	A All
<input checked="" type="checkbox"/>	TXN00099225	Depot_Office	1862	03/03/2025	02/26/2025	63.89	ODP BUS SOL LLC # 101078	✓ ✓ ✓	10-10-918102-5-5720	

1 Selected | 1 Item Show 10 per page Page: 1 of 1

9 Find the transaction to send back.

Global Card Access Works® Go To Bank of America

BANK OF AMERICA Purchasing Approver

Works

Home Expenses Reports

Expenses / Transactions / Approver Lewis-Clark State College

Transactions - Approver

<< Pending Sign Off Signed Off Flagged All Clear Filters Columns

Advanced Filter

Date - 03/01/2025 - 03/07/2025

03/01/2025 - 03/07/2025

Retain settings

Group - All

Account - All

Amount Range - All

Dispute Status - All

Account Status - All

Search Reset

<input type="checkbox"/>	Document	Primary Accountholder	Account ID	Date Posted	Date Purchased	Purchase Amount	Vendor	Comp Val Auth	Allocation	A All
<input checked="" type="checkbox"/>	TXN00099225	Depot_Office	1862	03/03/2025	02/26/2025	63.89	ODP BUS SOL LLC # 101078	✓ ✓ ✓	10-10-918102-5-5720	

1 Selected | 1 Item Show 10 per page Page: 1 of 1

10 Click the drop down arrow, then select Raise Flag.

The screenshot shows the 'Transactions - Approver' interface. At the top, there are navigation links for 'Home', 'Expenses', and 'Reports'. Below that, a breadcrumb trail reads 'Expenses / Transactions / Approver'. The main content area features a table with columns: Document, Primary Accountholder, Account ID, Date Posted, Date Purchased, Purchase Amount, Vendor, Comp|Val|Auth, Allocation, and A. A single transaction is listed with ID 'TXN00099225' and a purchase amount of 63.89. A context menu is open over this transaction, listing actions: Allocate / Edit, Sign Off, View Full Details, Dispute, Raise Flag (highlighted with an orange circle), Manage Receipts, and Print. On the left, an 'Advanced Filter' sidebar is visible with various filter options. At the bottom, it indicates '1 Selected | 1 Item' and 'Show 10 per page'.

11 Enter any comments related to why the transaction is being sent back, if needed. The p-cardholder/p-card manager will see these comments on the transaction.

For example, indicate a cost center needs to be updated or a receipt attached.

Click Ok.

This screenshot shows the same 'Transactions - Approver' interface as above, but with a 'Confirm Raise Flag' dialog box open in the foreground. The dialog box contains the text 'Raise flag on 1 transaction(s). Comments: Sending back to update cost center to 123456'. At the bottom of the dialog, there are 'OK' and 'Cancel' buttons, with the 'OK' button highlighted by an orange circle. The background interface is dimmed, showing the same table and filter sidebar.



The transaction will now be available in the Flagged section for the p-cardholder/p-card manager to update.