

Copittrak Editor

Transaction Approval Mode

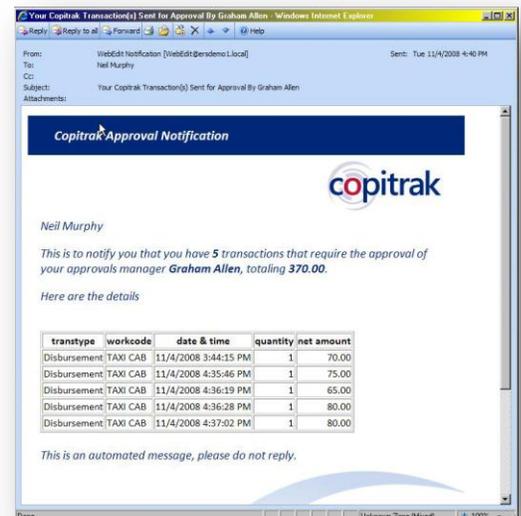
In addition to reconciliation and chargeback of costs, the Copittrak Editor has a built-in *Transaction Approval Mode* which allows Firms to better manage costs by requiring Manager Approvals for specific types of costs.

Approvals can be set by a specific transaction type i.e. travel costs, credit card charges, etc., or can be set by a dollar threshold or both.

Email Notification

Both the user responsible for the transaction and the manager are notified via email when transactions enter the system that meets the approval required rules.

The email will detail each transaction and include a link which the manager can follow to automatically log into the Copittrak Editor to approve, modify or reject the transactions.



Advanced features include:

- **Advanced Billing Integration** – Allows firms to take full advantage of the power of their financial system
- **Progressive email Notification** – Emails can go out daily or weekly and can increase in urgency and frequency as the Month end billing cycle draws near.
- **Desktop Pop-up** – Linked with the Copittrak Desktop the Exception Notification tool provides friendly reminders to users that certain transactions need attention. Its frequency can also be changed based on time.
- **Auto Editing** – As the user corrects transactions over time the Copittrak Editor will start to automatically edit transactions for the user by auto-assigning account numbers to transactions when it finds matches based on previously edited transactions. Users can accept the changes or choose to assign the costs to another account.
- **Auto Assignment for Aging Transactions** – The Copittrak Editor can automatically assign transactions remaining in the users account to a personal or expense account. This enforcement feature keeps transactions from building up in a users account.

