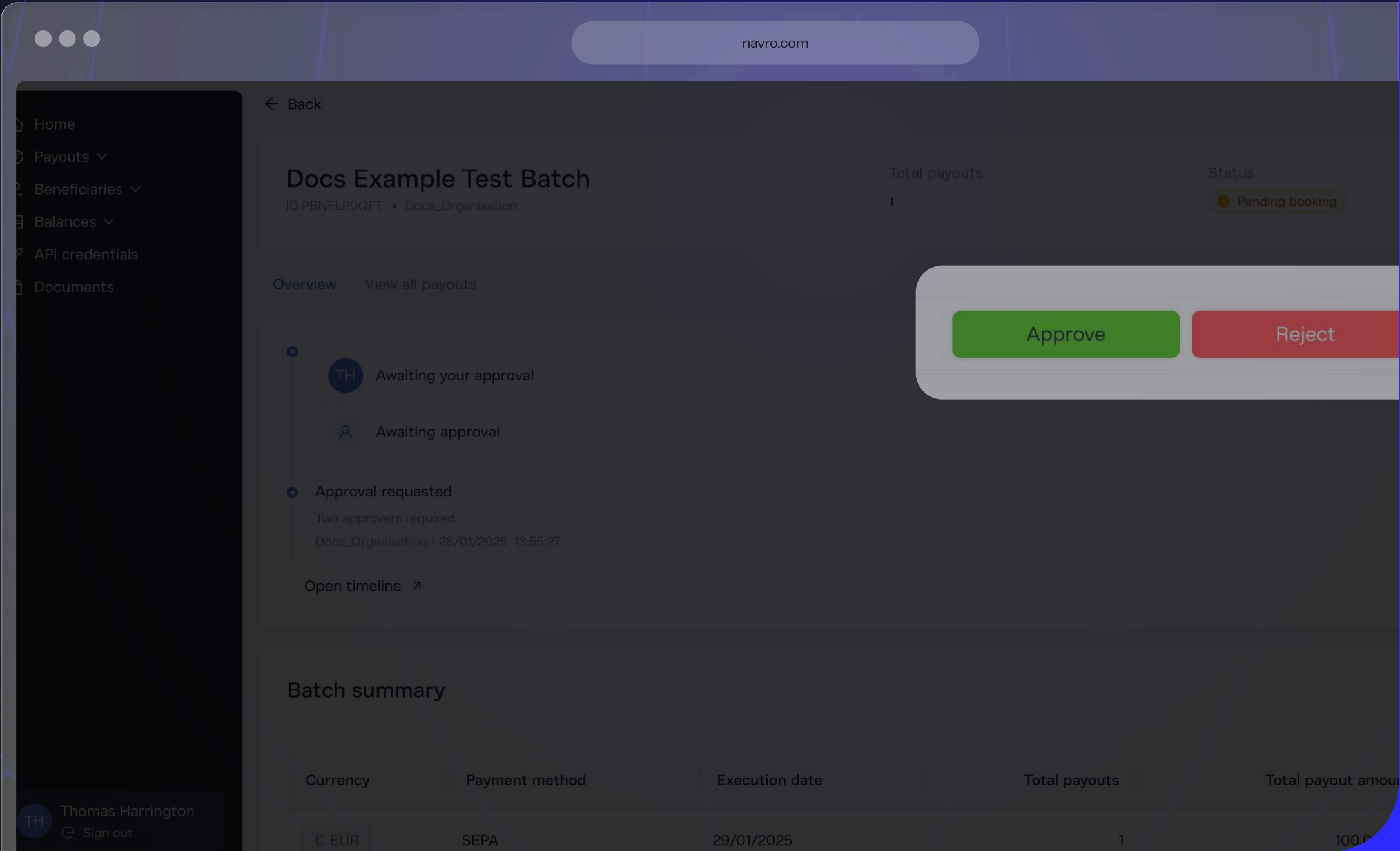


14.
Payout
Approvals



This guide is designed to help you get started using Navro. We hope you find it useful. If you need further support please do not hesitate to reach out to us via email support@navro.com

Payout approvals in the Navro Hub

1

When an authorised person from your business contacts client support to create an organisation, they can optionally request that we enable payout approvals for that organisation.

If you enable payout approvals, no payouts can be made in your organisation unless they're approved by someone with the correct role. This can be very useful to ensure that all of your payouts receive the correct level of review.

There are four different roles that an authorised person at your business can assign users in your organisation:

- 1. Payout manager:** Has full access to payouts, including the ability to create and approve payments. Cannot approve their own payouts.
- 2. Payout creator:** Can create beneficiaries and payouts from the Hub but not approve or book payments made by other users.
- 3. Payout approver:** Can view all data from beneficiaries and approve payouts created by other users.
- 4. View only:** Only has view-only access to the hub and cannot create or approve anything.

Payouts can be approved at any time. This includes the weekend and bank holidays, although payouts won't be initiated until banks open.

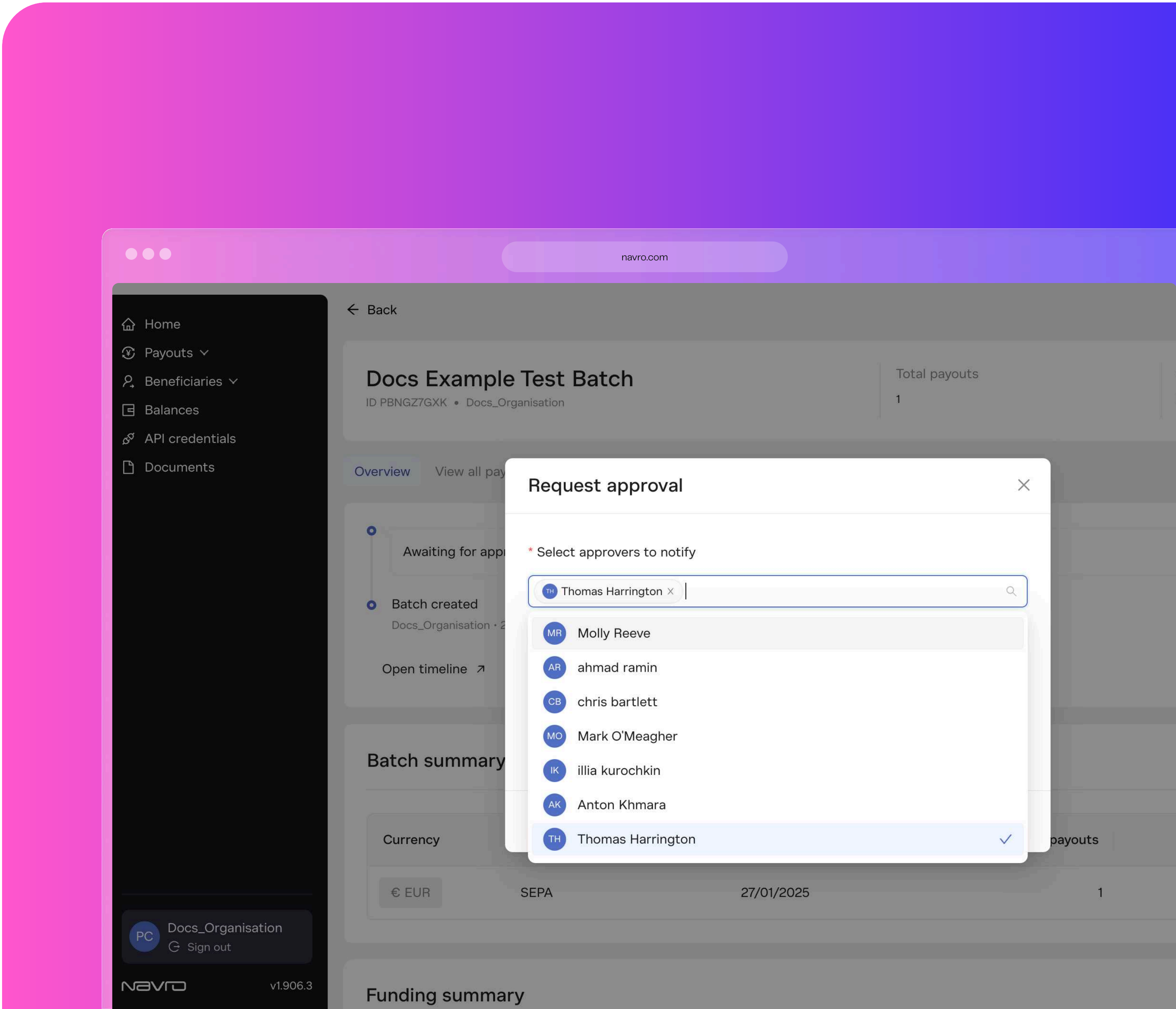
Request approval for a payout batch

This flow only applies if you have created a payout batch and have the Payout manager or Payout creator role. To request approval:

- 1. Create a payout** or payout batch, then open the payout batch details screen.
- 2.** In the Overview tab, select **Request approval**.
- 3.** In the Request approval window that displays, select the user or users you want to approve the payout, then select the **Request approval button**.

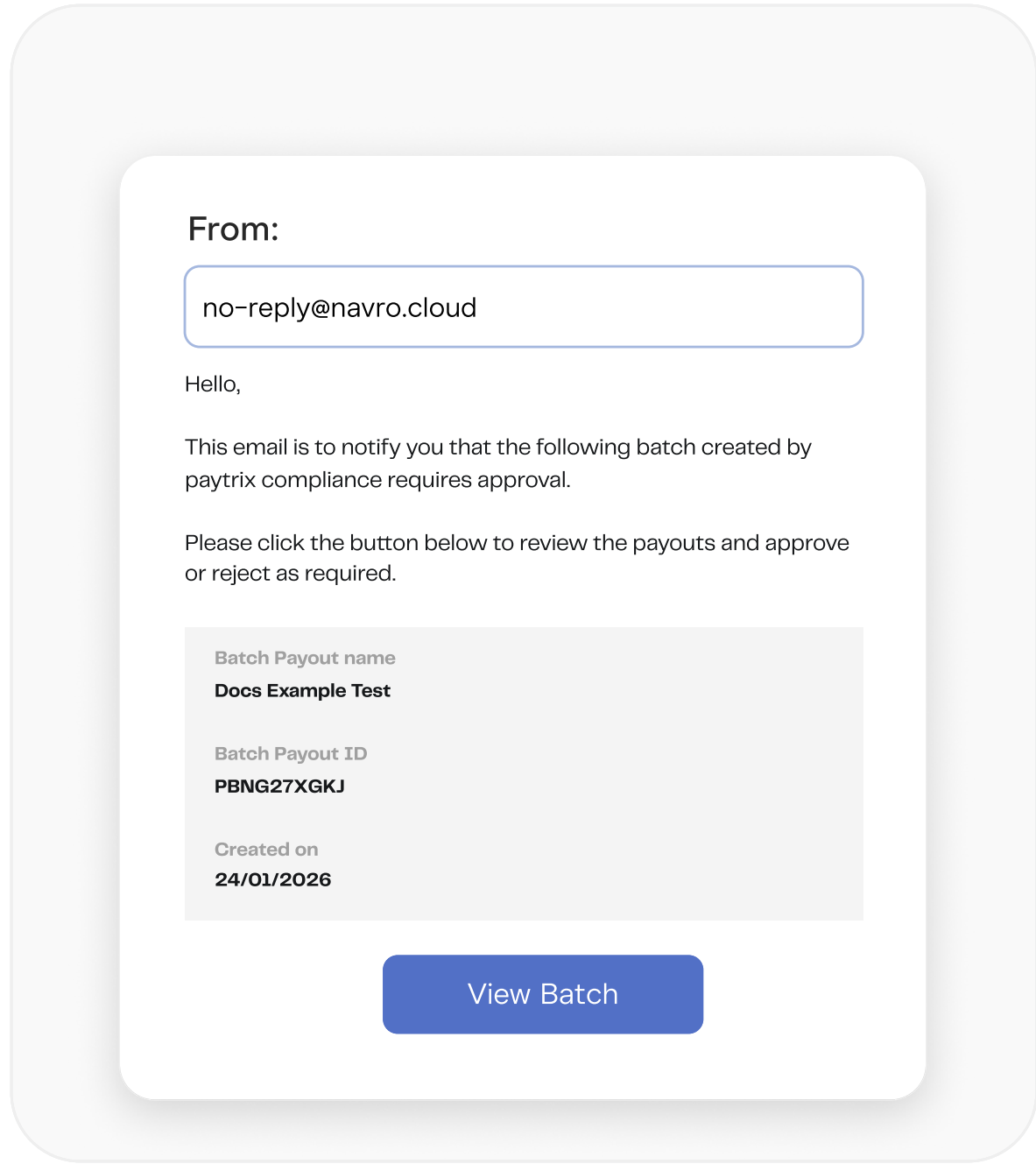
Notice

You can select the Resend button on the payout batch details screen. This resends the approval request email to each user you requested approval from.



Payout approvals in the Navro Hub

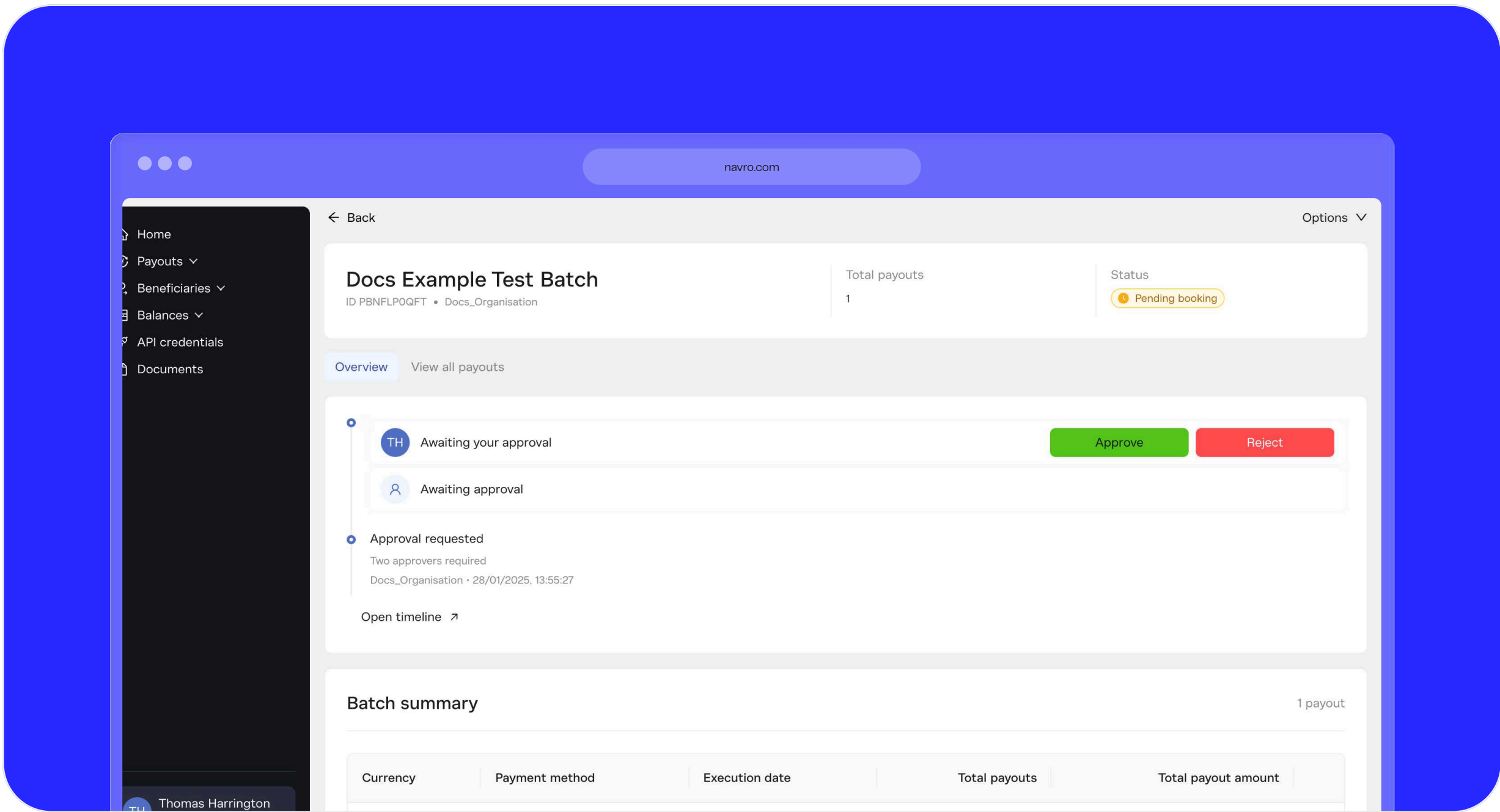
2



Approval Email

The users you requested approval from receive an email like this, notifying them of the payout batch that needs approval:

3



Approve or reject payouts

In order to approve or reject payouts, a user needs to have the Payout approver or Payout manager role. **If a user rejects a payout batch, it is a terminal action and cannot be undone.**

If a user has one of these two roles, to approve or reject a payout they:

1. Navigate to **Payouts > Batches** in the Hub.
2. Open the batch needing approval by selecting the arrow to the right of the payout batch. Alternatively, they can click the View batch link in the email they received.
3. Select **Approve or Reject**.



Get in Touch

 support@navro.com

HOW-TO-GUIDES

