

# Transaction Reviews

Let managers review team transactions after they're made

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For an added layer of control, Admins can set up Transaction Review Policies so Managers can confirm that their team's transactions were permitted under your company's expense guidelines.

With Float's intelligent card limits and controls, these instances should be rare, so the Default policy does not require transactions to be reviewed on Float.

You can create custom Transaction Review Policies to apply across the company or to specific Teams as well as set custom multi-level review levels by spend amount.

## Review Levels

Review levels indicate who is responsible for reviewing a transaction at each transaction amount.

**Any amount** ▼

Expenses starting from

**Reviewer**

Indicate who reviews transactions within this threshold.

Reviewer

+ Add Review Level



# Transaction Reviews

Reviewers in Float can quickly see all transactions needing their attention on the “Transactions” page. From the “Needs Review” tab, reviewers can select whether or not a Spender transaction was permitted within your company’s guidelines.

Once a transaction is marked as permitted, the finance team can confidently export transactions from the “Ready for Export” page to their accounting system already reviewed, coded, and embedded with receipts.

If a transaction is not permitted, the Manager can mark the transaction and follow up with the cardholder or finance team to take the necessary action.

