HowTo:
Approve Alternate Requests
Welcome to our HowTo guide for Approving Alternate Requests. Please note, you must be an Account Executive in order to issue approvals.

This is a walk-through of the process, created to make your job easier.

If you have any questions after reading this guide, please contact us.

The links to the GFA Application on the front page of CIS.
The GFA homepage has many links on the navigation bar, located at the top.

Select Designate Alternates (1), then Account Executive Approvals (2).
Instructions will appear – read through them carefully, then click Close to proceed.

Select an action (1) for each Alternate (2), Activity (3), and Date Range (4).
**Note:** You can use *Fill Down* to set the action for all pending requests.

Click *Submit* when you are finished.
Scroll down through your list of requests (1), and click Confirm (2).

Additional notes:

• Choosing NO ACTION will simply leave a request in a pending state. The request will show up in the list the next time you open the Account Executive Approval application.

• Selecting APPROVE ALL will approve all outstanding requests regardless of the number shown on the screen.

• You can choose to see more records per page using the drop-down just above the SUBMIT button.

• An email goes out every Monday morning notifying account executives of pending alternate requests. This is the only notification that is sent. Nothing is generated when a new request is made unless it’s outstanding on Monday morning.