



Partner Certification Training



EmberEdge Inc.
INV-121

USD
6,780.00

Bill to PO Matching



USD 6,280.00
Billed

USD 500.00
Remaining



Thomas Lee
Regional manager

Approved



Grace Taylor
CFO

Approved

✓ Audit report generated

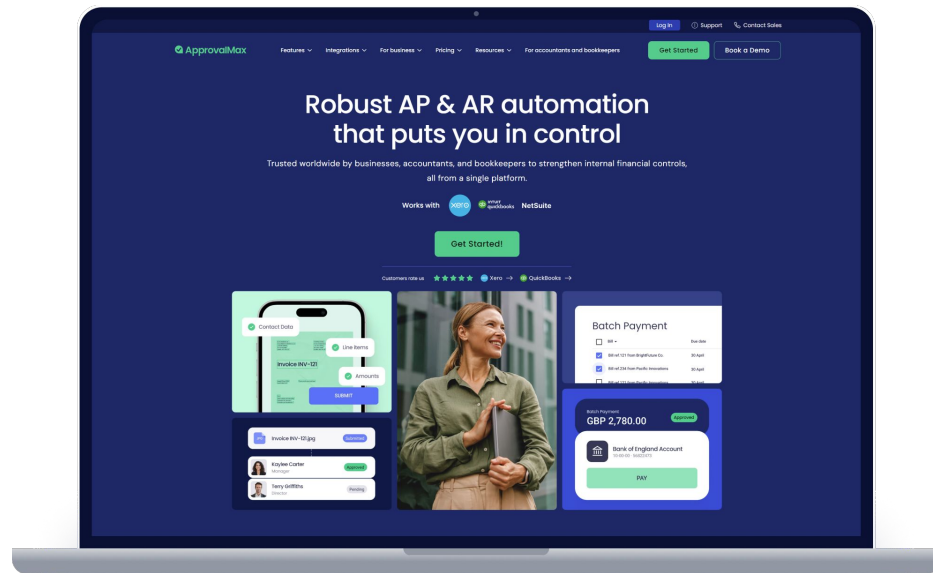
Agenda

- About ApprovalMax
- Essential financial controls
- ApprovalMax new features
- ApprovalMax Capture and Pay
- Live demo
- ApprovalMax Partner Program
- Subscription Management & Pricing
- Q&A



ApprovalMax

- ✓ Trusted globally by businesses, accountants, and bookkeepers
- ✓ Automates end-to-end AP and AR to get financial documents approved on time
- ✓ Integrates with Xero, QuickBooks Online, NetSuite, and Cin7 Core
- ✓ Xero App Partner of the Year Award Winner 2021 and 2022
- ✓ Xero Awards 'Global App Partner of the Year' finalist 2023 and 2024
- ✓ 5-star rating (500+ reviews)



ApprovalMax in Numbers

2024

11.62+

million bills processed

2.4+

million purchase orders

432K+

sales invoices

48.1K+

vendor requests

27.7K+

batch payments

10.6K+

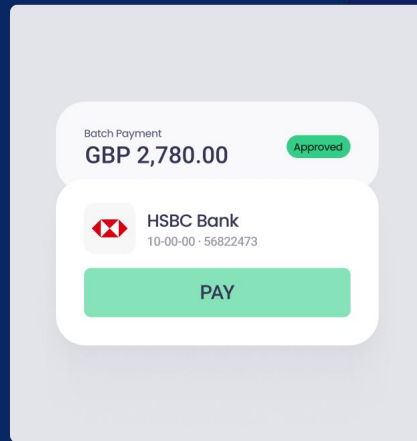
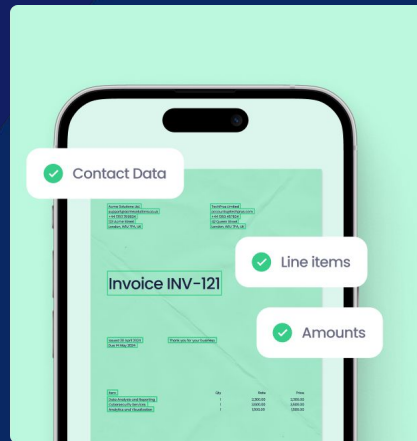
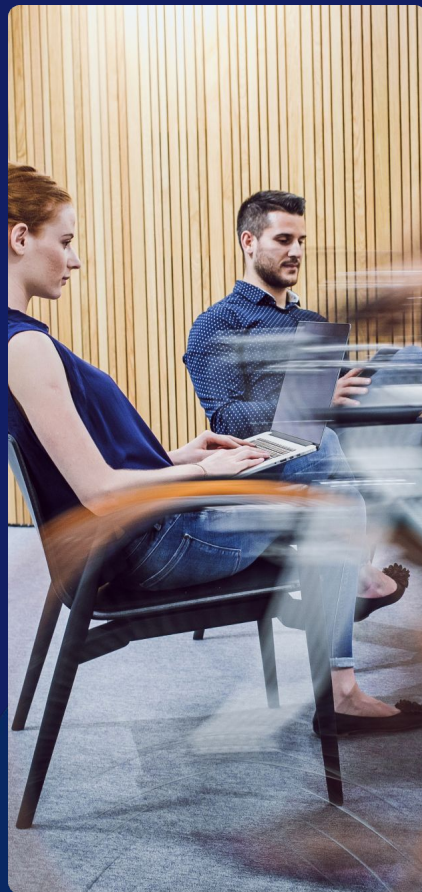
budgets synced

Quick poll

Which ApprovalMax features do you find the most useful in your day-to-day practice?

Are there any other features that you would like to see in ApprovalMax?

New product features



49 New updates and features in 2024!

JAN	Manual Journals • Journal Entries	 
FEB	Sales Order & Vendor Return Workflows • Price Checker for Bills • POs & Expenses • New UI	 
MAR	Scheduled Payments • CSV Import for Manual Journals • User Mentions • Batch Payments • Resend Quotes • Dext Vendor Notification	
APR	Duplicate Check on Bill Create/Edit	  
MAY	Review step • Editing on Approval	
JUN	ApprovalMax Capture • ApprovalMax Pay Beta (UK)	
JUL	Public API • Comments in History • Pay Module • Monitor Payment Progress • Merge Bills • Email File Submissions	
AUG	Review Step • Accrual Report • Bulk Actions • Mentions in Pop-ups • Role Selection on User Invite • Data Capture Warnings	 
SEP	Edit on Approval • Version History • Public API Explorer • 'On Hold' Status • QBO Sales Invoice (Beta) • Passkey Login • Name/Email Search	 
OCT	ApprovalMax Capture • Duplicate checking • Scheduled Payments • 'On Hold' Status • Sales Invoice Workflow • AR Aging Report	  
NOV	Multiple Matching • Budget Check (Beta)	 
DEC	Review step for credit notes • Line removal on editing • Bills duplicates detection by Invoice Number • Sales Invoice workflow • Bill Payments creation • ApprovalMax Pay scheduled payments • Bill to PO matching • Automated matching when copying PO to Bill	 



ApprovalMax Capture

Automate the tedious

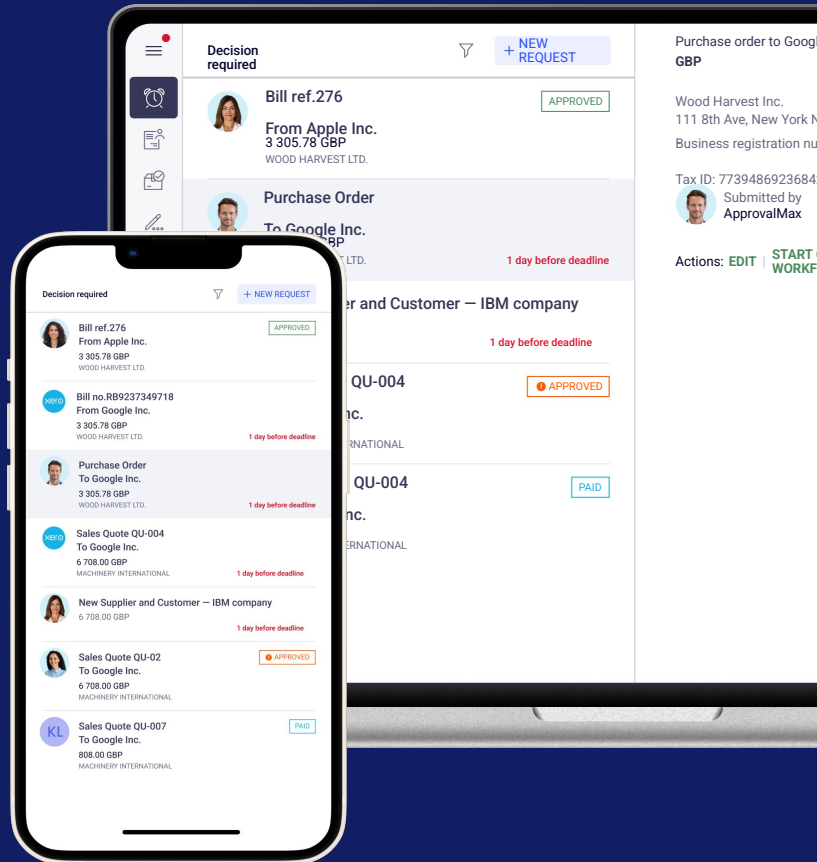
- ✓ Upload single or in bulk
- ✓ Upload via drag and drop
- ✓ Line item extraction
- ✓ Dedicated email inbox

ApprovalMax Pay

Beta

The smarter, faster, safer
way to pay your bills

- ✓ Pay directly from ApprovalMax
- ✓ Have a single source of truth for a full process
- ✓ Segregate duties between parties and eliminate the risk of an error
- ✓ Merge bills from the same supplier into one transaction

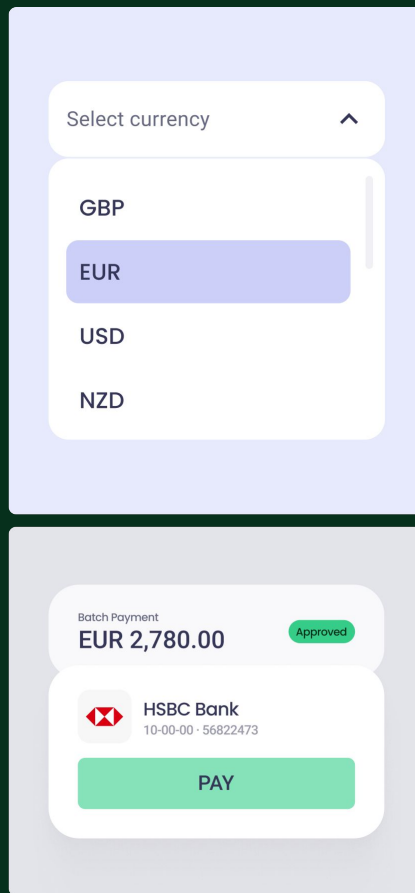




YIR 2024

December 2024

Watch the recording and learn about all of our new features launched in 2024 and those coming in 2025



Our features remove the common pain points experienced by your clients



Data errors and inconsistencies when manually entering data



Accurate data and consistency due to strong internal controls and processes



Missed payments due to a slow approval process that takes weeks



25% of bills are approved within 2 hours and 50% within 1 day in ApprovalMax



Always having to chase decision makers to get their approval



Approve any time, anywhere with our mobile app, Slack, or email



Unable to see approvals moving through different stages



Full visibility of requests, however simple or complex the workflow



Extra audit work and investigation needed to find document trails



Automatically generated audit trails and reports for each approved item



Too many people have access to the GL and data



When using ApprovalMax, your users only see what they need to see

Live product demonstration





Partner Programme

Explore all of the benefits and tools for our partners on our portal



Partner discounts that allow including ApprovalMax to your service package and reselling it to your clients



Dedicated Success Manager



Priority support by email and phone



Free ApprovalMax Partner guides for all integrated GLs



Free 1:1 interactive training and consulting on demand



Partner Portal marketing materials for you to use to inform your clients



Our additional partner resources



Our Partner Portal provides a wealth of resources for our partners



The latest guides on all of our features



Training and advice is available on a variety of topics



Webinars covering product “how-to” videos, and partner interviews



Subscription Management



Pricing

- ApprovalMax is licensed and billed per Organisation
- No limitations on Users/Requests
- Organisations added/removed right away but billed from the next billing date
- Advertised prices on <https://www.approvalmax.com/pricing>
- Partner discounts are available with our new partner program

Subscription & Billing Management

Adding organisations

- Create a new organisation (it starts off as a trial organisation)
- Add an organisation to a subscription
- Change subscription assignment

Special organisations

- Free Partner Edition
- NFP

Adding/Changing a subscription

- Increase/Decrease the number of allowed organisations

Q&A

Thank you!



approvalmax.com



✓ Contact Data

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Invoice INV-121

✓ Line items

Issued: 30 April 2024
Due: 1 May 2024

✓ Amounts

SUBMIT

Item 1
Data Analysis and Reporting
Cybersecurity Services
Employee on-site consultation

Subtotal
Total incl 20%
Total GBP

1,500.00
1,000.00
GBP 2,500.00

 Sales Quote QU-002
contact@kozily.io

GBP 880.00

DECLINE

ACCEPT