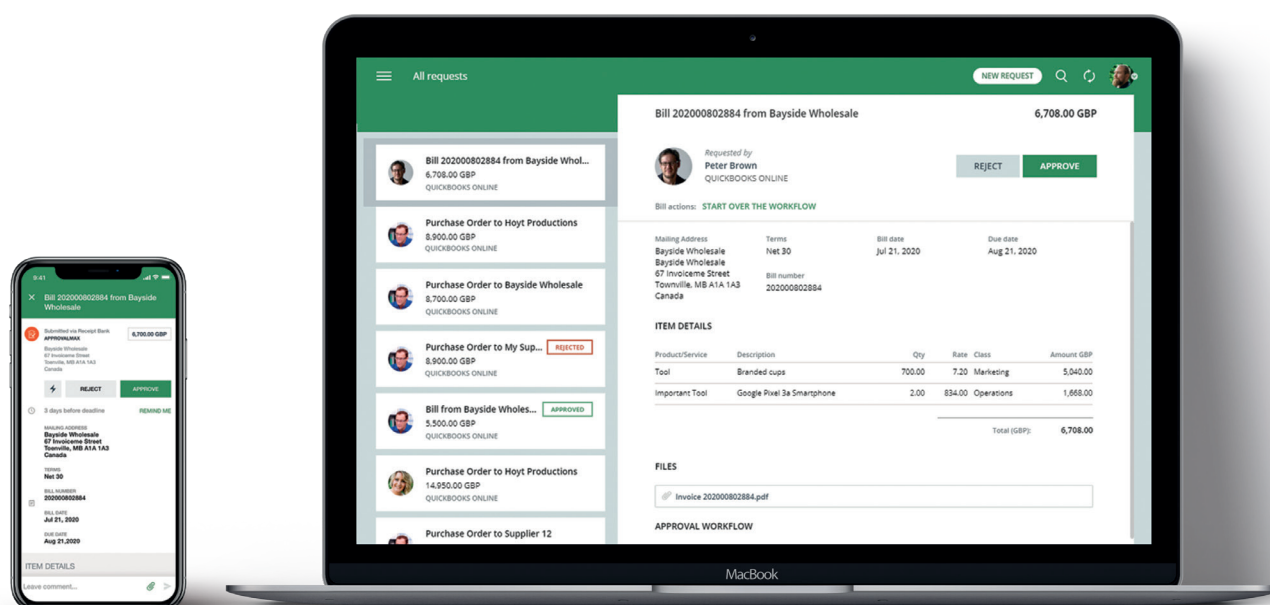


Online approval workflows for finance and accounting

ApprovalMax extends the QuickBooks Online accounting platform with approval-driven financial controls. It replaces paper- and email-based approvals with fully automated multi-role and multi-tiered approval workflows, and ensures spend control and regulatory compliance for both internal accounting and financial service outsourcing organisations.

ApprovalMax is easy to set up and use: approval configuration requires no technical expertise and can be done with a few clicks.



KEY APPROVAL AUTOMATION WORKFLOWS

PURCHASE ORDER CREATION AND APPROVAL

ApprovalMax allows to raise and approve purchase orders outside of QuickBooks Online via the mobile app or the web interface.

Guardrails for the creation of purchase orders are provided. Approvers are immediately notified of pending requests. Proper approvals are ensured by a flexible multi-step, multi-role process that can be customised to fit any business. Once purchase orders have been authorised, they get synched to QuickBooks Online, ready for further processing.

BILL CREATION AND APPROVAL

ApprovalMax enables bill creation and approval outside of QuickBooks Online via the mobile app or the web interface.

Bills can be created directly in ApprovalMax or fetched via Receipt Bank. As soon as bills appear in ApprovalMax, they are automatically routed through a multi-step and multi-role approval process that is based on predefined criteria; such as vendor, amount, category, class, location, etc. Once authorised, bills are pushed to QuickBooks Online ready for payment, with the audit reports automatically attached.

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KEY FEATURES AND CAPABILITIES

MULTI-STEP AND MULTI-ROLE APPROVALS

Complex workflows ensure that approval decisions are performed by managers with the appropriate authorisation level and in full accordance with corporate and regulatory requirements.

EXCEPTION HANDLING

There is a whole range of capabilities supporting authorisation exceptions. These include the options to reject an approval request as well as revoke, delegate, or force the approval decision.

ON-THE-GO APPROVALS

ApprovalMax supports both web and mobile platforms. Approval requests can be approved on the go via the app or from email notifications, and purchase orders can be raised and submitted for approval from mobile devices.

REPORTING AND AUDIT LOGS

Default and custom reports can be generated to provide the complete approval history in audit-ready form. Tracking of all approval activities performed outside of the predefined workflow is also available.



BENEFITS OF USING APPROVALMAX

SAVE TIME AND INCREASE ACCURACY

No more approver chasing via email or call. 100% accurate approval flow. Full details in each approval request available on the go.

ACHIEVE VISIBILITY AND ESTABLISH CONTROL

Guardrails for requesters in purchase order creation. Reminders, email and push notifications.

SCALE UP AND IMPROVE PRODUCTIVITY

More transactions performed. Less time spent on clarifications. Approval, authorisation and validation are fast and easy.

ENSURE COMPLIANCE AND SIMPLIFY AUDITS

Multi-step and role-based approvals. Each approval is audit-ready and has a complete approval history including all approvers' comments attached.