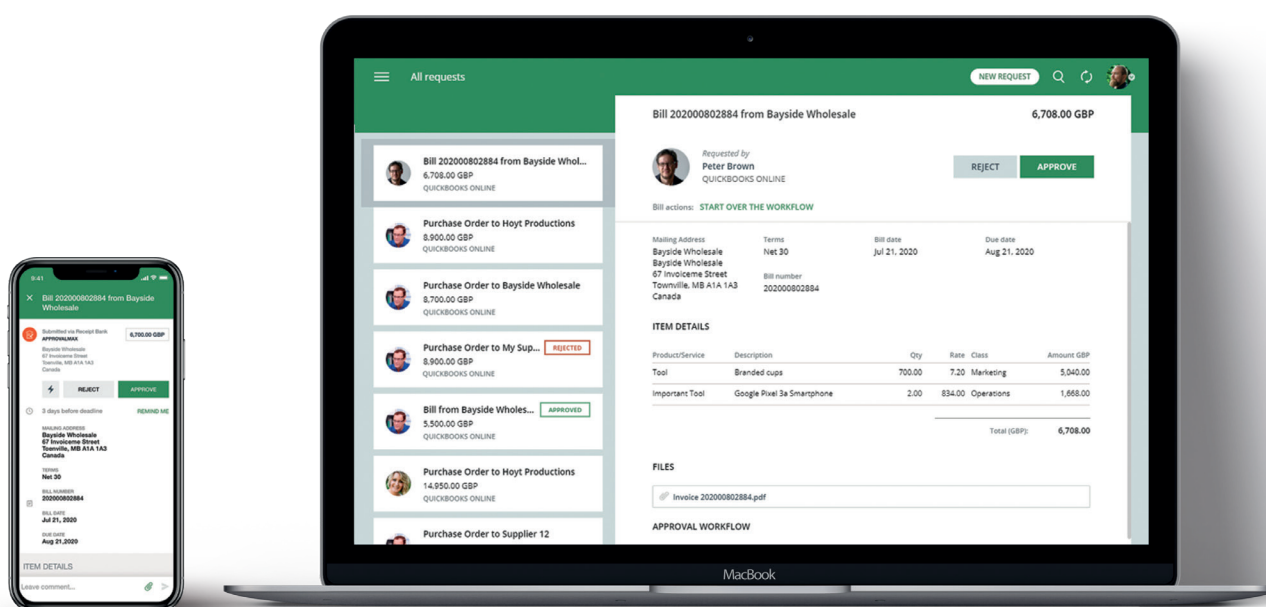


Financial controls for your clients and your business

ApprovalMax extends the online accounting platform Xero with approval-driven financial controls for Accounts Payable and Accounts Receivable.

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.



KEY ACCOUNTING WORKFLOWS

PURCHASE ORDER CREATION AND APPROVAL

Employees can raise purchase orders without having to access the accounting system – on-the-go and in the web interface. Guardrails are provided for purchase order creation. Approvers are immediately notified of pending requests.

BILL REVIEW AND APPROVAL

ApprovalMax automatically pulls all bills in the “awaiting approval” status from Xero and routes them according to the predefined approval workflow based on one or several criteria such as Supplier, Amount, GL code, etc.

BILL TO PURCHASE ORDER MATCHING

ApprovalMax allows matching of bills to the corresponding purchase orders for Approvers to have complete information on the bill. Also, the incoming bill price can be checked back with Xero’s Product catalog to identify discrepancy.

SALES INVOICE MANAGEMENT

ApprovalMax enables validation and approval of sales invoices to make sure they are issued in full correctness and with complete detail as agreed with the client ensuring accuracy and minimising time for sales invoice rework.

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★★★★★ Xero Community Rating

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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

NOTIFICATIONS AND APPROVAL VIA EMAIL

Approval workflows allow configuring automatic notifications to Approvers via email and pushing the approval process forward. Approval from email is enabled for all types of approval requests.

REPORTING AND AUDIT LOGS

Default and custom reports can be generated to provide the approval activity history in audit-ready form. Tracking of all approval activities performed outside of the

MOBILE APP

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

EXCEPTION HANDLING

A whole range of capabilities supporting authorisation exceptions are provided. These include the ability to reject an approval request as well as revoke, delegate, or force the approval decision.

COMPATIBILITY WITH DATA ENTRY TOOLS

ApprovalMax supports all kinds of data capture tools, including pre-accounting software such as Receipt Bank, AutoEntry and Datamolino, Xero's Hubdoc software and the "Email to Bill" function.



APPROVALMAX BENEFITS



TAKE APPROVERS OUT OF XERO

Approvers are taken out of the accounting software. Granular authorisation roles are supported. Better security is provided.



ESTABLISH CONTROL AND VISIBILITY

Guardrails for Requesters during purchase order creation are in place. Bills are matched with the corresponding purchase orders. Reporting on the approval progress is generated.



ENSURE COMPLIANCE AND FACILITATE AUDITS

Flexible approval workflows configured with the authorisation matrix ensure compliance with all internal or external regulations.



SCALE UP AND IMPROVE PRODUCTIVITY

More transactions are performed. Less time is spent on clarifications. Reminder, email, and push notifications help avoid delays

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