



## ApprovalMax new Partner Program FAQ

We've compiled some of your most asked questions around the new Partner Program so you can get the most out of it.

### Why are we changing the Partner Program?

Much like within the ApprovalMax platform itself, we are always looking for ways to improve our offering for partners to help you support your firm and clients. We took on board valuable feedback from our partner community and identified areas for improvement to better support you via our Partner Program.

### What's the difference between the Volume Discount and the Partner Level Discount and how do they work together?

Volume and partner discounts can be applied both individually and together, depending on what criteria are met.

- **Volume discounts** are calculated on the total number of organisations covered by all of your subscriptions in your account, regardless of the type of plan. The discount increases as more orgs are added to your account.
- **Partner discounts** are an additional layer of discounts that are calculated according to your Partner Level, whether it's bronze, silver, gold or platinum. Your Partner Level takes into account the number of paying clients with organisations under your account and the number of certified practice staff on your team.

When you meet all the criteria for a specific level, both the volume and partner discounts will be applied to your account.

### What is changing with the current program mean?

Our new Partner Program goes live on 15 February 2024, but this will not immediately affect the discount you are receiving on your current orgs right away. Any partner discounts that are in place today will remain at the same rate until December 15 2024. If you add any new subscriptions after 15 February, these will fall under the terms of our new Partner Program and will receive the new partner discount and volume discount, relevant to the tier you fall under. Please note that your current orgs and subscriptions will count towards your tier qualification in the new Partner Program as well.

### What do you mean by “Grandfathering”?

We are grandfathering organisations linked to subscriptions paid for before 15 February 2024. Partners will be able to remove organisations from grandfathered subscriptions. Paid capacity will be decreased accordingly. Partners will not be able to add new organisations to grandfathered subscriptions or change plans of those subscriptions. The paid capacity of the grandfathered subscriptions counts towards the total paid capacity on account

### I’m already a partner with ApprovalMax. What happens if I sign up new clients after Feb 15?

You will receive the new volume and partner discounts based on the total number of orgs your account has, both new and current included.

### I already have an agreement in place – will I have to sign a new one?

Yes. All partners will be required to sign our new ApprovalMax Partner Program Agreement in order to unlock the new benefits and discounts, as well as updating our terms and conditions for all of our partners.

### What are 'Automatic Feature Updates'?

Whenever there is a new feature being released, partners will have first priority and will be informed first via email and on the partner portal. This is like a sneak-peek as it will be before the wider ApprovalMax customer base is informed.

### What's included in the Marketing Collaboration?

For our Gold and Platinum level partners, we offer a menu of promotional opportunities that will include but not be limited to social posts, newsletter spotlight interviews, webinar invitations, awards, invites to exclusive networking events, and more. You will be able to work closely with the ApprovalMax marketing team on a variety of activities.

### What is the Partner Directory?

We are launching a new Partner Directory that will showcase our top level partners on our website with links to your own business website. We aim to highlight our valued partners with our new directory that will be visible to potential new clients.

### What is the difference between a free demo org and a free partner org?

A free partner org must only be used for your internal approval/accounting process. A free demo org can be used for demonstration purposes to help you show your clients the benefits of ApprovalMax in their financial controls. Both are not available for resale.

### Will there be changes to Partner training and certification?

Yes, ApprovalMax's training and certification program will be updated with a new certificate and additional on-demand modules. This will be updated over the next few months.

## My firm has 5+ organisations but no certified practice staff. Will I still qualify for the higher partner level?

Yes, but practice staff do need certification in order to maintain the partner level. This training unlocks a deeper understanding of our product that can enhance your clients experience and even save you time and money!

## What else will be included?

Partner-specific functionality: We will release new functionality that addresses your frequent pain points. This will include a Xero Practice Manager integration and other features to help your practice centralise and streamline bookkeeping and pre-accounting work. This will enable a number of additional services for your clients.

## Who do I contact if I have a question?

Please submit any additional questions [here](#) and we'll get back to you soon with a response.

Please note: Elements of our Partner Program may be subject to change from time to time but we will endeavour to inform all of our partners ahead of time with regards to any alterations that might impact your partner plan.