



The ApprovalMax Partner Program Guide

Welcome to the ApprovalMax Partner Program

Our new Partner Program has been re-designed to provide you with more benefits, marketing opportunities, and better rewards.

Our partners rely on ApprovalMax's approval workflow data to make informed decisions and facilitate digital growth and transformation for their clients' financial controls.

Please be aware that this guide undergoes periodic updates to align with the evolution of our program. Real-time enhancements to our Partner Program may occur from time to time.. It's important to note that the information provided in this guide is not binding on ApprovalMax unless explicitly stated in the Partnership Program Agreement.

Program Overview

By providing cost-effective robust financial controls with ease and at scale, partners gain a competitive advantage, differentiate themselves, and enhance client retention. Participating in our partner program can unlock many benefits for your practice and clients that can elevate your position as a trusted financial advisor.

Our partnership opportunities are not only available to financial practitioners but we welcome solution providers and experts to benefit from our program.

Benefits

Our Partner Program benefits contribute to stronger value propositions, improved client services, increased client retention rates, and reduced service costs with cost-effective robust financial controls..

- Discounts
- Referral Fees
- Dedicated Support
- Exclusive Onboarding
- Quarterly Business Reviews
- Complimentary Demo Access
- Partner Success Contacts
- Priority updates to new functionality

Partner Program Options

Our new Partner Program offers a broader range of benefits tailored to various partner types.

- Volume Discounts
 - Earn larger discounts when you increase your total volume of organisations
- Partner Levels
 - Get additional discounts and benefits when you grow and become a certified partner
- Referral Program
 - Get rewarded when you refer multi-entity clients, or clients who are using Oracle NetSuite

The more you implement ApprovalMax across your client base, the more benefits you'll unlock!

Volume Discount Plan

Our previous volume discount offering was limited to the number of subscriptions under each plan level. For example, orgs on an Advanced plan were not counted towards the volume discount for orgs on a Standard plan.

From 15 February 2024, all of your clients, regardless of the subscription type will count towards a single volume discount. This will automatically increase your overall discount, with higher discounts available as your client list that utilises ApprovalMax's solution increases.

Number of organisations discounts
1-4 organisations: 0%
5-24 organisations: 15%
25-99 organisations: 20%
100-499 organisations: 25%
500+ organisations: 30%

Partner Levels

We value our partners' commitment to driving joint success and proven expertise in our platform. Our new tiered Partner levels provide an easy method to participate and deliver rewards - an additional discount and other benefits - for increased dedication to our partnership. We welcome accounting and bookkeeping practices of all sizes to join our growing ecosystem. Check out our levels to see which one fits your needs.

To qualify, your firm should offer financial services to their clients including: accounting, bookkeeping, treasury, payroll, audit, or reporting.

Level	Qualifying criteria	Level Discount*	Partner Additional benefits
Bronze	1-4 paid capacity in the partner account on ApprovalMax	0%	Access to partner portal Onboarding session Partner support Automatic feature updates Partner badge Practice staff access
Silver	5-24 paid capacity in the partner account + 2 certified practice staff	10%	Bronze level benefits + QBRs Success roadmap A free demo org in ApprovalMax
Gold	25-49 paid capacity in the partner account + 2 certified practice staff	20%	Silver level benefits + Monthly partner success team calls A free partner organisation in ApprovalMax Partner directory profile (coming soon) In-person QBRs*
Platinum	50+ paid capacity in the partner account + 2 certified practice staff	30%	Gold level benefits + Marketing content collaboration Exclusive advance product webinars

*The partner level discount is combined with the volume discount. Total price after discounts available to partners = List price * (1 - Volume discount) * (1 - Partner level discount)

Referral Program

We know that some clients keep their financial controls in-house and may not have an ApprovalMax subscription yet. If you think they can benefit from ApprovalMax, we offer referral fees for introducing and onboarding ApprovalMax to new multi-entity clients or those using NetSuite. Referral fees will be made either as direct payments or as credits towards your ApprovalMax subscriptions up to the value of the referral amount.

Our current referral fees are as follows:

- **Xero or Quickbooks Online clients with a min. of 3 organisations: £230**
- **Netsuite clients: £1000**

Our referral fees may be subject to change however we will inform you in advance if changes will occur. Your Partner Success Manager can also guide you through the referral program if you require more information. In the meantime, please refer to your agreement for all terms and conditions.

Partner Requirements

Participating in the ApprovalMax Partner Program is simple to set up. We do request that you meet our minimum criteria in order to qualify:

- Your firm must be able to provide financial services including: accounting, bookkeeping, treasury, payroll, audit, or reporting.
- At least one paid capacity in your account (e.g. One organisation on a paid subscription)
- A signed partner agreement (we will provide you with this)
- At least two ApprovalMax certified practice staff to access Silver and above partner level benefits

Every month, your partner account will be automatically assessed based on paid capacity to determine your partner level. Certification criteria will also play a role in maintaining your level. Expect our partner success team to reach out to you for certification updates.

Training & Certifications

ApprovalMax hosts monthly training and certification sessions. Sessions normally take 1.5 hours and once completed, you will receive a certificate and badge. All sessions are also available on-demand via our Partner Portal under the Learning and Certification tab. Our certification sessions can also contribute to your CPD/CPE accreditation. We encourage you to participate and gain your certification to unlock all of the functions for your financial controls available with ApprovalMax.

Already an existing partner?

We are currently grandfathering our existing pricing and discounts to make way for more benefits tailored to fit your needs. Our existing pricing and discounts on all organisations subscribed before 15 February 2024 will remain unchanged and give you time to transition to our new program, this pricing will remain in place until 15 December 2024. The paid capacity of your grandfathered subscriptions counts towards the total paid capacity on an account.

[Have questions?](#) Get in touch and we can help.

About ApprovalMax

ApprovalMax is an award-winning B2B software platform used by businesses around the world to build robust financial controls. It streamlines the approval process by allowing users to create automated workflows to approve bills and invoices. ApprovalMax integrates with platforms such as Xero, QuickBooks Online, and Oracle NetSuite to unlock powerful efficiencies for accounts payable and accounts receivable functions in any finance team.