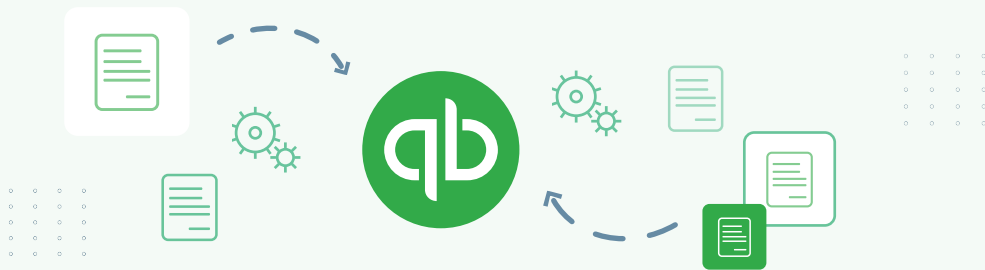


Online approval workflows for finance and accounting

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

01

Purchase orders are raised and approved outside of QuickBooks Online via ApprovalMax mobile app or the web interface. Guardrails for the creation of purchase orders are provided. Approvers get immediate notifications 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 synced to QuickBooks Online, ready for further processing.

Bill creation and approval

02

Bills are created and approved outside of QuickBooks Online via ApprovalMax mobile app or the web interface. Bills can be also fetched via Dext Prepare. As soon as bills appear in ApprovalMax, they are routed through a multi-step and multi-role approval process 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.

Expense creation and approval

03

Expenses are created and approved outside of QuickBooks Online via ApprovalMax mobile app or the web interface. Requesters can choose Payee, Payment account and Payment method. You can configure the requesters' access rights to fit the needs of a particular business. Approvers get automated notifications to review the expenses. When all approvals are in place, the authorised expense is published to QuickBooks Online with the automatically generated audit report.

Start a 14-day free trial

approvalmax.com

Online approval workflows for finance and accounting

Key features and capabilities

Financial controls that everyone can understand

Use ApprovalMax to create an approval authorisation workflow that's simple (or one that's really complex!). It's super easy for non-finance team members to approve POs, bills, and invoices in one click.

Budget checking

Approvers get a real-time overview of their budget by seeing it next to the documents they're approving. It's easy to validate spending against a budget, or choose any period for budget checking.

Automatic audit trails

After a document has been approved, an audit report is automatically generated and attached to the document in the GL, giving you peace of mind that the details are captured for your next audit.

Approve from your mobile

You don't need to be at the office to approve documents. ApprovalMax works from your mobile so you can make lightning fast approvals anywhere, any time. It's easy and can be done in one small tap.

Benefits of using ApprovalMax

- ✓ Eliminate manual processes and the time-consuming task of collecting physical signatures for invoice approvals.
- ✓ Reduce the hours spent each week raising POs, handling invoices, and chasing up approvers manually.
- ✓ Protect your business from accidental or unauthorised payments, and fraudulent transactions.
- ✓ Faster approval times mean you'll never miss another payment deadline or prompt payment discount.

Streamline your AP and AR processes today

ApprovalMax is trusted by



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