Contents

What is ApprovalMax?

- ApprovalMax is an approval workflow system.
- Administrators create a workflow with rules that direct purchase orders (POs) and bills to the relevant person or department.
- ApprovalMax integrates with other accounting platforms, such as Quickbooks and Xero.
- Once all approval steps are complete, ApprovalMax automatically posts the PO or bill to the linked accounting platform.

Key Terms

- Account Owner: Person who bought the subscription – this user sees all requests, approvals, and rejections in every organization linked to their ApprovalMax subscription, as well as having all permissions of an administrator.
- Administrator: Creates and manages workflows and assigns workflow roles to users.
- Approval request: A purchase order or bill submitted to the workflow by a requester.
- Approver: The user in this workflow role approves or rejects Pos and bills that flow to them.
- Auditor: A read-only role for viewing workflows.
- Bill: Invoice sent from supplier to buyer to request payment.
- Default Approver: The user in this workflow role acts as a "catch-all" approver if an approval request submitted does not follow the rules for a specific step in the workflow.
- Net Terms: The amount of time set between the bill date and the due date.
- Purchase Order (PO): Document sent from buyer to supplier to fill an order.
- Report: Document highlighting specific information with insights and analyses.
- Requester: The user in this workflow role creates approval requests and submits them into the workflow.
- Vendor: Person or company that your business purchases from.
- Watchers: The user in this workflow role oversees specific approval requests and will receive notifications for updates relating to it.
- Workflow Manager: Creates and manages workflows like an administrator, however this user cannot assign roles to other users.
- Workflow Roles: Designated functions within the workflow.
- Workflow: A process that directs approval requests to the relevant department or employee.

Introduction

If you are reading this guide your company has purchased an ApprovalMax subscription, and you have been added to the system to create or approve POs and bills.

Creating an account

In this section you will learn:

- How to create an ApprovalMax account.
- Logging in with ApprovalMax.

Your account owner or administrator will first need to add you to the ApprovalMax system using your name and company email address.

Once you have been added, you will receive an email asking you to accept the invitation to join. Select “accept invitation”, and you will be redirected to the ApprovalMax website.

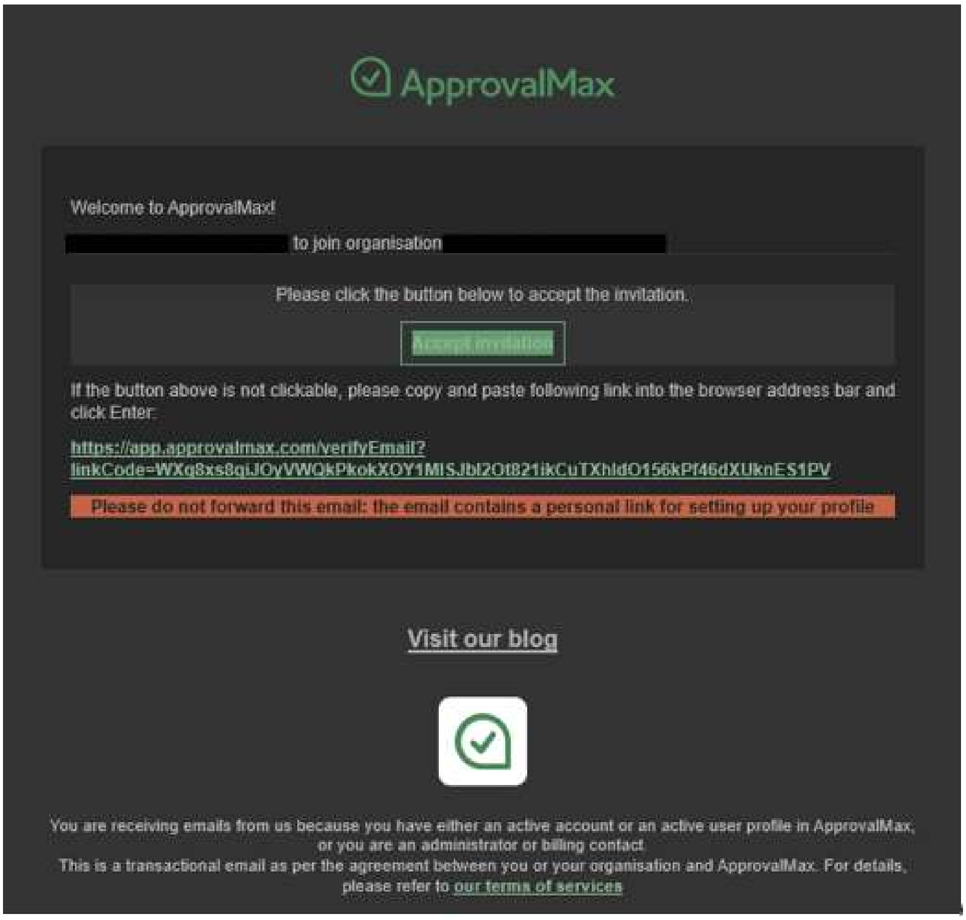

Figure 1: Welcome email from ApprovalMax.

Enter your name and phone number and create a password.

Remember your username and password, as you will need to use them each time you login.

Creating an Approval Request

In this section you will learn:

- How to create a new approval request on the ApprovalMax website.
- Which information is mandatory when creating a new approval request.
- What additional information you can include.
- What happens once your approval request has been submitted.

Step 1

In the top-right corner of the page is the “new request” button.

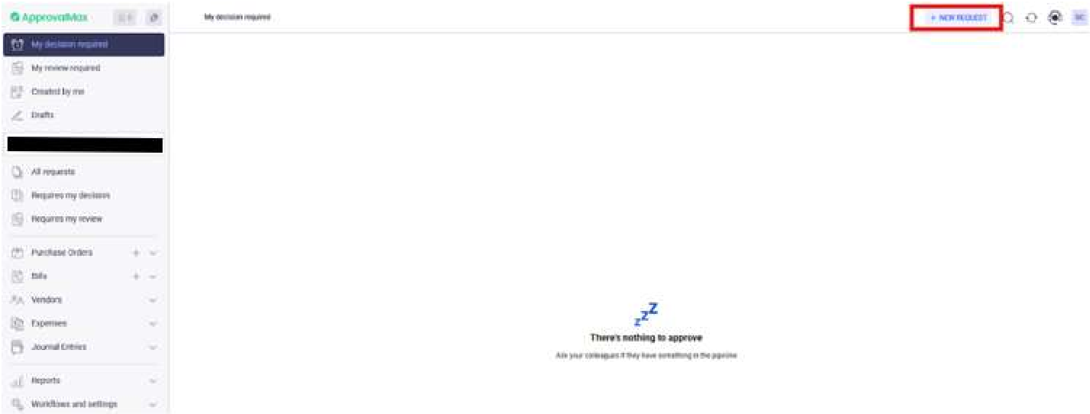

Figure 2: Screenshot of the ApprovalMax homepage, with the “new request” button outlined in red.

Select this button to open the new approval request menu. From here, you can create a new request for any approval workflow in which you are a requester, including other companies connected to your ApprovalMax account.

Figure 3: The new approval request menu.

Select the bill or PO option by the relevant company. This will take you directly to the order details page for the approval request you are creating.

Step 2

The order details section will look slightly different depending on whether you are creating a PO or bill.

Creating a New PO

When creating a new PO, the order details screen is divided into four sections:

1. Vendor details
2. Shipping details.
3. Category/ line-item details.
4. Message to vendor.

Let’s break each of these sections down to better understand what information is mandatory, and the additional information you can include.

Vendor Details

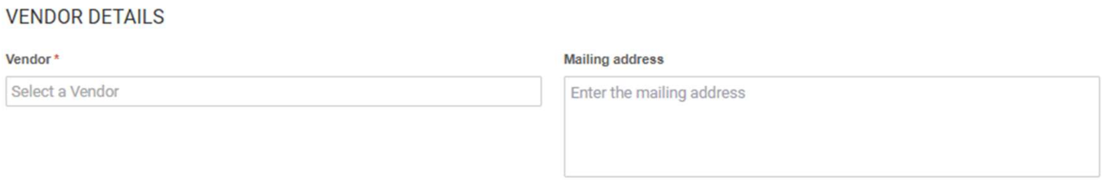

Figure 4: Vendor details screen for POs.

Mandatory field: Clicking on the “select a vendor” box will bring up a list of available vendors from your connected accounting software. You must select a vendor before you can submit your PO for approval.

Once you have selected a vendor the “mailing address” box will be auto populated with the address on file for the vendor in your accounting software.

Additional information: You can also edit, remove or replace the mailing address by selecting the “mailing address” box and typing.

Shipping Details

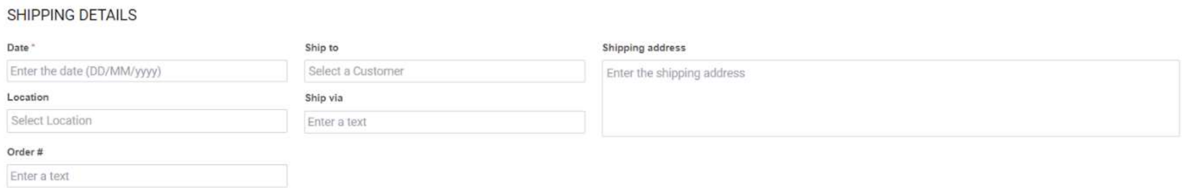

Figure 5: Shipping details screen for POs.

Mandatory field: The “date” field will auto populate with the date on which the PO is created. You can edit the field by clicking in the box and selecting a different date from the pop-up calendar.

Additional information: Clicking in the “ship to” or “location” fields will prompt you to choose an option from a dropdown menu that is auto populated from your accounting software.

Clicking in the “shipping address”, “ship via” or “order #” field allows you to type any additional information relevant to the PO request.

Category and Line-Item Details

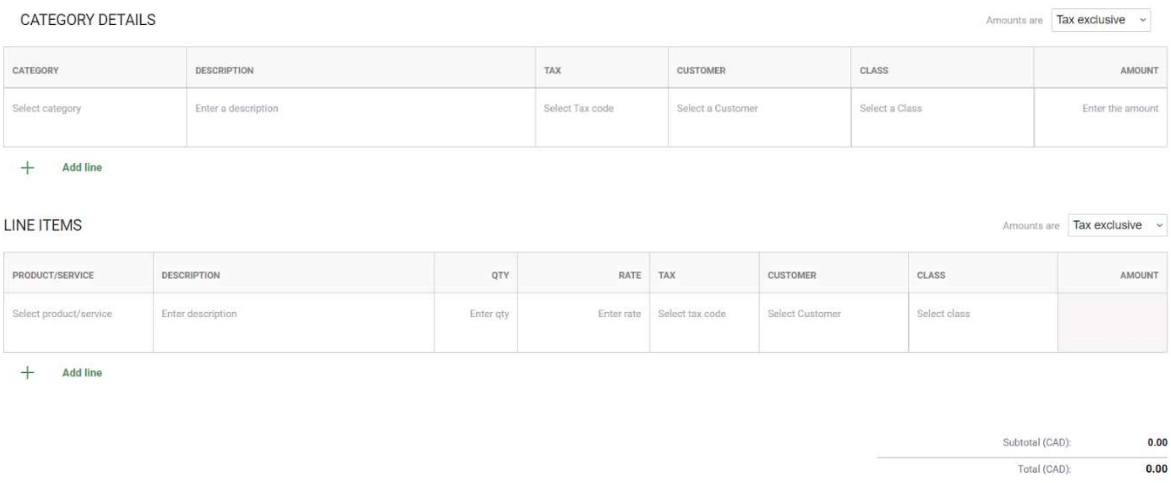

Figure 6: Category and line-item details screen for PO.

Mandatory field(s): The category or line-item details are the products or services being requested from the vendor.

In ApprovalMax, “line items” refers to inventory. When pulling from your linked accounting software, ApprovalMax will only auto populate products listed as inventory.

“Category” refers to all other products and services that have been created in your linked accounting software.

You do not need to select a product or service for both sections; however, you must complete all fields for any product or service selected.

Message to Vendor

Figure 7: Message to vendor screen for POs with “add an attachment” and “email PO to vendor” buttons visible.

This section of the PO is optional.

If you would like to attach a message for the vendor to read when they receive the PO, select the “vendor message” box and type your message.

If you would like to add an internal memo on the PO for you or your team, select the “memo” box and type your message.

It is also possible to attach additional files to your PO by selecting the green “add an attachment” button below the “vendor message” box. This will open file explorer and prompt you to select a file.

Once you have completed the PO, you can select the "automatically email the approved purchase order to the vendor" button at the bottom of the page. Checking this box will prompt you to enter the email address, subject and message you want to accompany your PO once it has been approved and sent to the vendor.

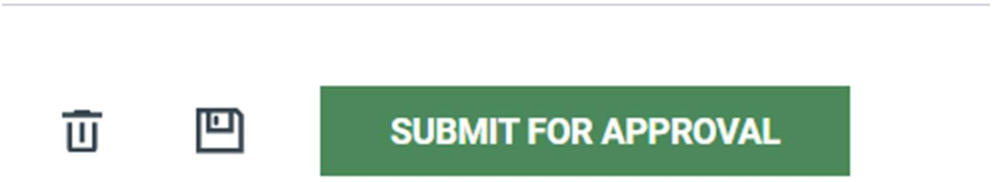

Figure 7: Delete, save, and submit for approval icons.

Click the "submit for approval" button in the top right corner of the page to finish drafting your PO and enter it into the approval workflow.

Creating a New Bill

When creating a new bill, the order details screen is divided into four sections:

1. Vendor details
2. Bill details.
3. Category/ line-item details.
4. Memo.

Let's break each of these sections down to better understand what information is mandatory, and the additional information you can include.

Vendor Details

Figure 8: Vendor details screen for bills.

Mandatory field: Clicking on the "vendor" box will open a dropdown list of available vendors from your connected accounting software. You must select a vendor before you can submit your bill for approval.

Bill Details

Figure 9: Bill details screen.

Mandatory fields: When you create a new bill, the bill date will auto populate as the date that the bill is created. If you would like to change the date, click on the "bill date" box to open the calendar, then select the date you would like to assign to the bill.

You must also select a due date. Click on the “due date” box to open the calendar, then select the date you would like to assign to the bill.

Additional information: Selecting the “terms” box will open a dropdown list of available terms from your connected accounting software. You should note that changing the terms would move the due date by the selected number of days, for example if you have a bill date of January 1st and apply a net term of 15 days, the due date will automatically move to January 16th.

Selecting the “bill number” box will allow you to enter an identifying number for the bill.

Selecting the “location” box will open a dropdown list of available locations from your connected accounting software.

Category and Line-Item Details

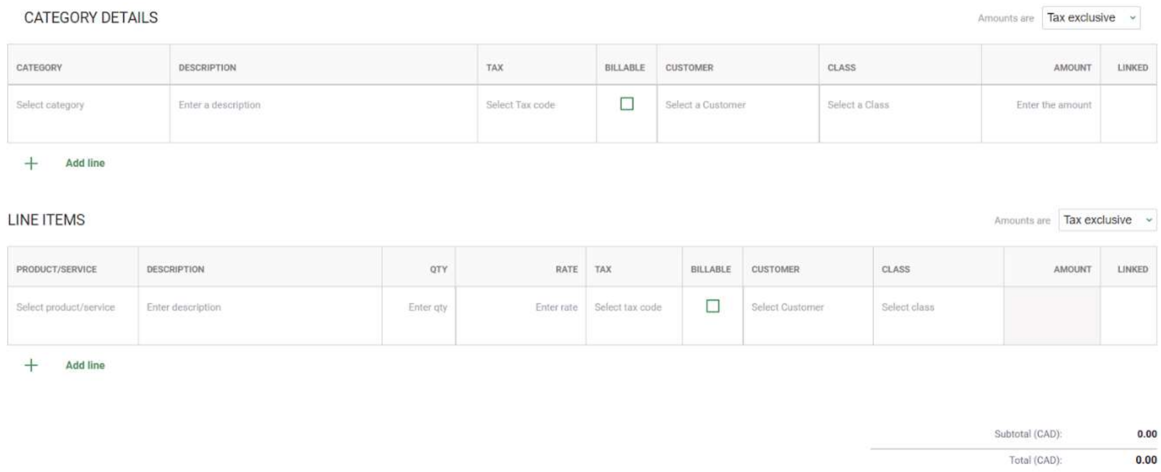

Figure 10: Category and line-item details screen for bills.

Mandatory field(s): The category or line-item details are the products or services that have been ordered from the vendor.

In ApprovalMax, “line items” refers to inventory. When pulling from your linked accounting software ApprovalMax will only allow the option of selecting products listed as inventory.

“Category” refers to all other products and services that have been created in your linked accounting software.

You do not need to select an option for both sections; however, you must complete all fields for any product or service selected.

Memo

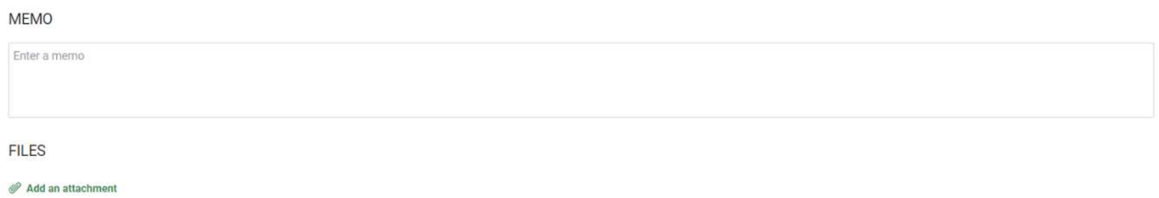

Figure 11: Memo screen for bills.

This section of the bill is optional, however if you would like to add a memo for you or your team, you can do so by selecting the “memo” box and typing your message.

It is also possible to attach additional files to your bill by clicking the green “add an attachment” button below the “memo” box. This will open file explorer and prompt you to select a file.

Figure 12: Delete, save, and submit for approval icons.

Click the “submit for approval” button in the top right corner of the page to finish drafting your bill and enter it into the approval workflow.

Step 3

After you have submitted your approval request into the workflow, it will then need to be approved by all relevant approvers before it is finalized and posted to your linked accounting software.

The Workflow

In this section you will learn:

- What the ApprovalMax workflow is and how it works.
- How to create a workflow and add rules to filter approval requests.
- Saving the workflow.
- Viewing the version history of the workflow.
- Copying the workflow.

Once a requester has created a new approval request, it will enter the workflow to gain approval from all relevant approvers.

The account owner, an administrator, or a workflow manager can create a workflow.

Approval requests flow from the requester to approvers, based on the rules you set. You can add multiple approvers to the workflow for each approval request.

Each workflow must have at least one requester and one approver.

Creating a New Workflow

Figure 13: ApprovalMax home screen with "workflows and settings" menu highlighted.

From the left menu select "workflows and settings", then "approval workflows". This will open the approval workflows page, where you can view all workflows available for setup.

Select the workflow you wish to create.

You will be taken to the workflow page for that type of approval request.

Building a Workflow

When building a new workflow for each type of approval request, the workflow screen will auto populate with three steps: creation/ pulling of approval request, approval step, and creation in your accounting software.

The user that creates the workflow will be automatically assigned the roles of requester and approver.

The account owner, an administrator, or a workflow manager can change requesters or approvers at any time by selecting the “add a requester/ approver” button and selecting the user they would like to add to the role from the list.

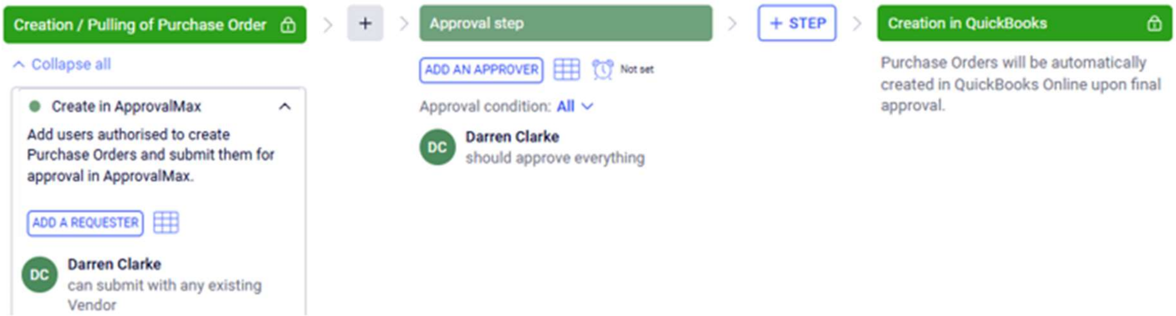

Figure 14: The default workflow. You can add steps by selecting the "+" icons between steps, and add requesters or approvers by selecting the relevant button.

There are 8 different rules that can be set to filter approval requests to the relevant approvers:

1. Amount: Filter approval requests by a value in your currency. You can set this rule as over or equal to, between, or under a value.

2. Requester: Filter approval requests by requester. If there are multiple requesters in your workflow, you can set a rule for approvers in each step to only see requests created by a certain requester. Selecting “requester matches” will only show this approver requests from selected requesters. Selecting “requester does not match” will stop an approver from seeing any requests from requesters selected.

3. Vendor: Filter approval requests by vendors in your linked accounting software. Selecting “vendor matches” will only show approvers requests relating to any vendors selected. Selecting “vendor does not match” will stop an approver from seeing any requests for any vendors selected.

4. Product/ service: Filter approval requests by one or more specific products or services in your linked accounting software. Selecting “product/ service matches” will only show approvers requests relating to any matching products or services. Selecting “product/ service does not match” will stop an approver from seeing requests for any products or services selected.

5. Category: Filter approval requests by one or more general ledger codes in your linked accounting software. Selecting “category matches” will only show approvers requests relating to any matching general ledger codes. Selecting “category does not match” will stop an approver from seeing requests for any general ledger codes selected.

6. Location: Filter approval requests by one or more locations available in your linked accounting software. Selecting “location matches” will only show approvers requests relating to any matching locations. Selecting “location does not match” will stop an approver from seeing requests for any location selected.

7. Class: Filter approval requests by one or more classes in your linked accounting software. Selecting “class matches” will only show approvers requests relating to any

matching classes you have created. Selecting “class does not match” will stop an approver from seeing requests for any classes selected.

8. Customer: Filter approval requests by one or more customers or projects created in your linked accounting software. Selecting “customer matches” will only show approvers requests relating to any matching customers or projects you have created. Selecting “customer does not match” will stop an approver from seeing requests for any customers or projects selected.

To add rules to your workflow, you must open the approval matrix, which you can do by clicking on the grid symbol beside the “add an approver” button.

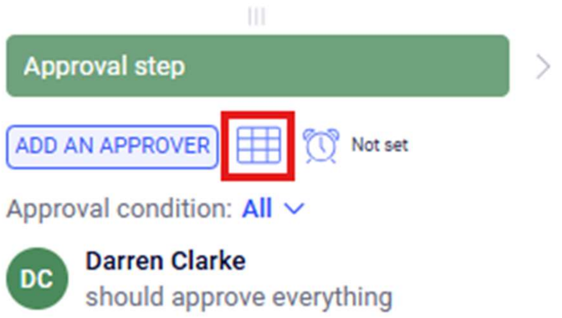

Figure 15: Approval step with the approval matrix icon highlighted.

The approval matrix will now be open, and you will be able to add and remove approvers and rules as needed.

If useful, you can add alternative rules for an approver within the approval matrix.

Where a regular rule in the workflow follows the formula “approver should approve if X”, the alternative rule follows the formula of “approver should approve if X or if Y”.

This is useful if you have one approver that has multiple potential situations where their approval is required.

To add an alternative rule, click on the three dots symbol beside the approvers name.

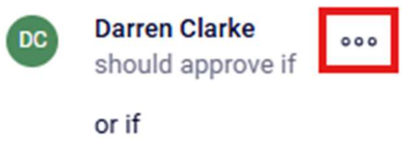

Figure 16: Approval step with "alternative approval rule" menu icon highlighted.

When you are done setting up your workflow, select “activate the workflow” in the top right corner of the screen to finalize and create it.

Figure 17: "Activate the workflow" button highlighted.

If you would like to save your changes without activating the workflow you can do so by selecting the save icon in the top right corner of the screen.

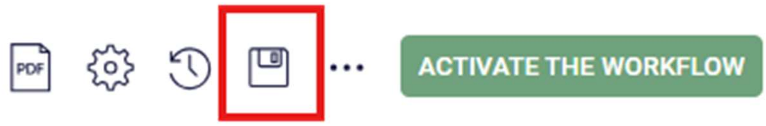

Figure 18: Save icon highlighted.

Each subsequent time you make a change to the workflow, you must select “update the workflow” to keep your changes.

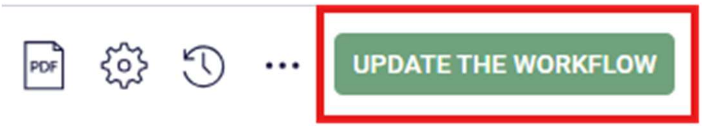

Figure 19: "Update the workflow" button highlighted.

Updating the workflow will prompt you to leave an optional comment to explain what changes were made.

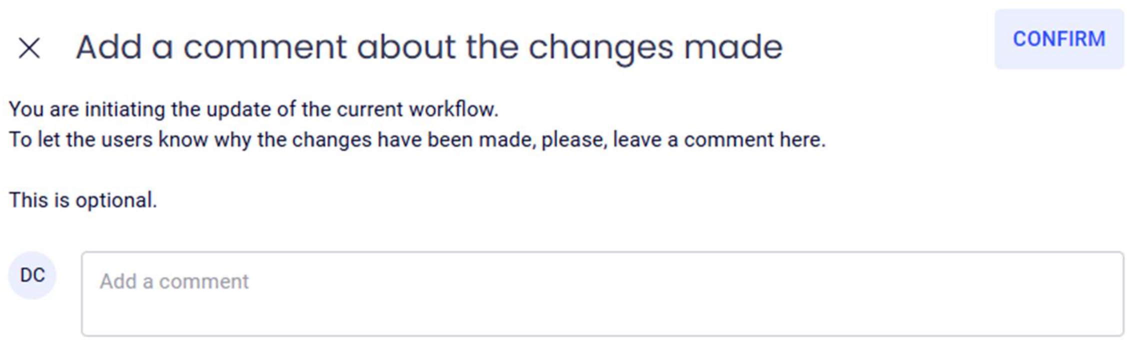

Figure 20: "Leave a comment" screen for an updated workflow. You will be prompted to leave a comment after saving any changes to a workflow.

Comments will remain beside the updated workflow in the version history.

You may find this useful if you have multiple administrators or workflow managers in your system.

To access the version history, click on the clock icon in the top right corner of the screen.

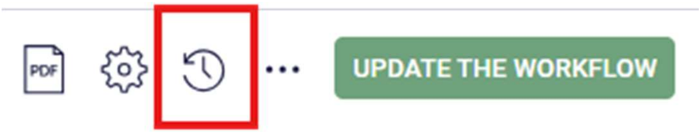

Figure 21: Version history icon highlighted.

This will open all previous versions of the workflow, along with any comments left under the changes.

Selecting the PDF icon allows you to download a PDF copy of the workflow in its current state.

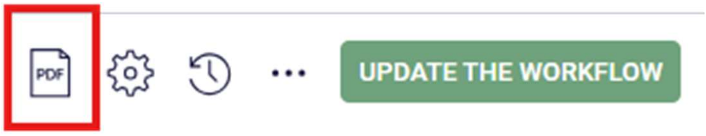

Figure 22: Download a copy as a PDF icon highlighted.

Selecting the settings icon will bring up all customizable features that you can make to your workflow.

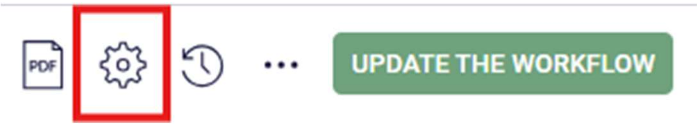

Figure 23: Settings icon highlighted.

Selecting the three dots icon gives you the option to discard all current changes, deactivate, or copy the workflow.

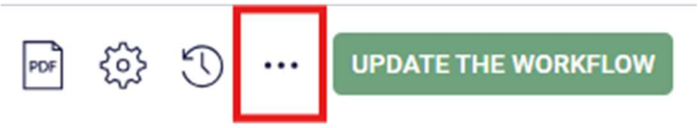

Figure 24: Three dots icon highlighted. Selecting this will give additional workflow options.

Copying the workflow is a useful feature if you have multiple workflows following the same format, for example if you have two companies attached to your account with the same requesters and approvers managing requests in both.

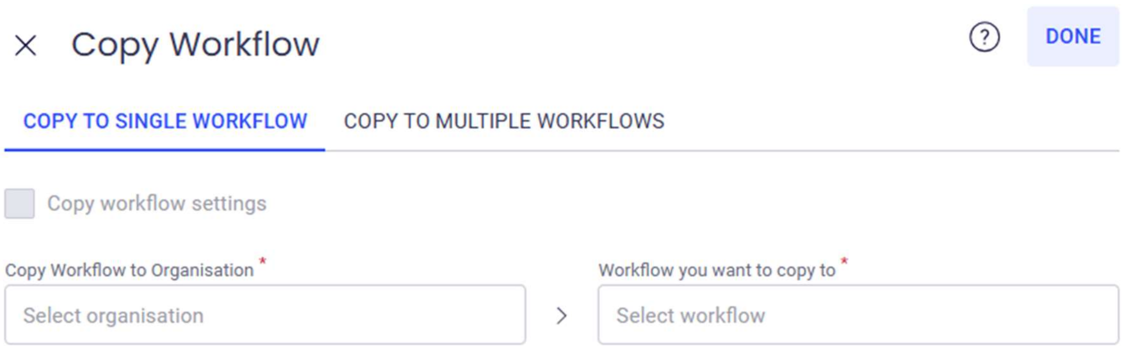

Figure 25: "Copy workflow" screen.

Select the organization and workflow you wish to copy your current workflow to. Select ‘done’ when finished.

Managing Approval Requests

In this section you will learn:

- How to view approval requests that require your decision.
- How to view the audit trail for the approval request.
- How to approve or reject a request and what happens next.

Managing approval requests in ApprovalMax is quick and straightforward.

Select ‘requires my decision’ from the left menu to view all open approval requests.

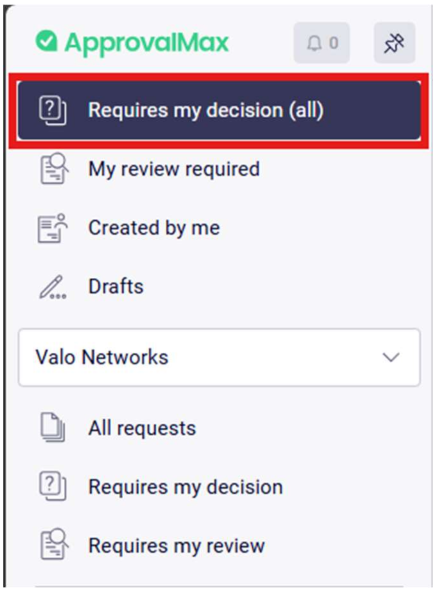

Figure 26: ApprovalMax homepage menu with "requires my decision" button highlighted.

Review all approval requests and select ‘approve’ if the information included is accurate. This will push the approval request to the next person in the workflow.

If you are the last approver in the workflow, selecting ‘approve’ will publish the approval request to your accounting software.

If any information is incorrect, select ‘reject’ and the approval request will be pushed back to the requester.

When managing approval requests, you can leave a note at any time in the audit log that will be published for your colleagues to see.

This is useful when rejecting approval requests as you can give the requester instructions on what needs to be changed.

Adding and Offboarding Users

In this section you will learn:

- Adding users and changing their roles.
- Offboarding users.

If you are the account owner or an administrator you may be required to add users, change their role, or offboard them from the system.

Select “workflows and settings”, then “users” from the left menu.

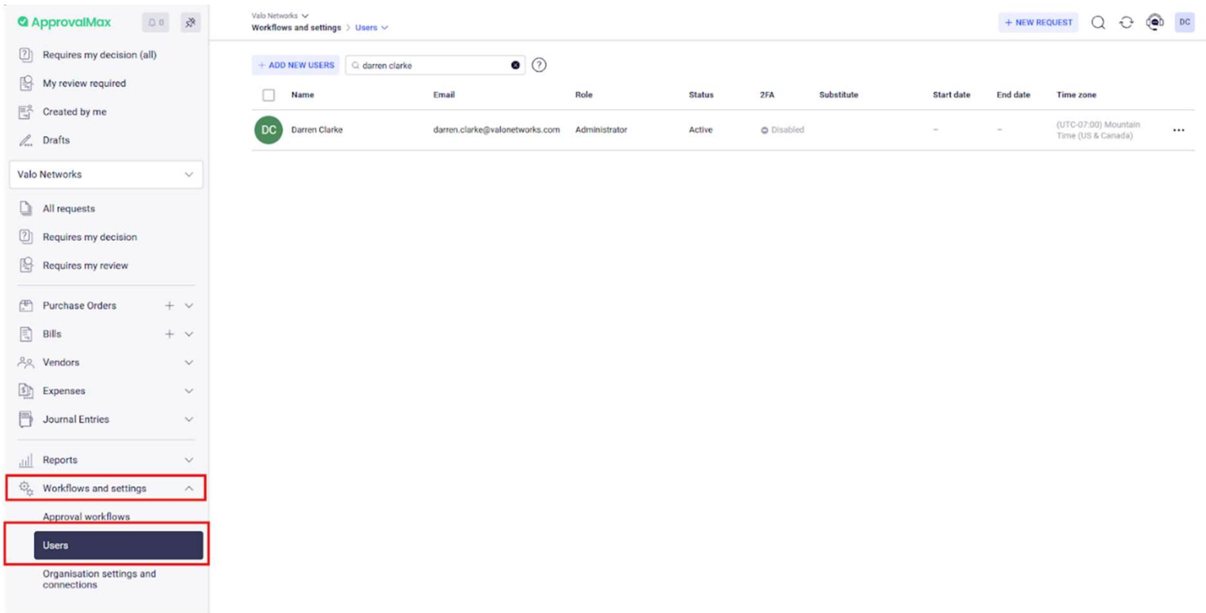

Figure 27: ApprovalMax menu with "workflows and settings" button highlighted.

In the users screen you will see a list of all users that have been added to ApprovalMax.

To add a new user, select the “add new users” button from the left-centre of the screen.

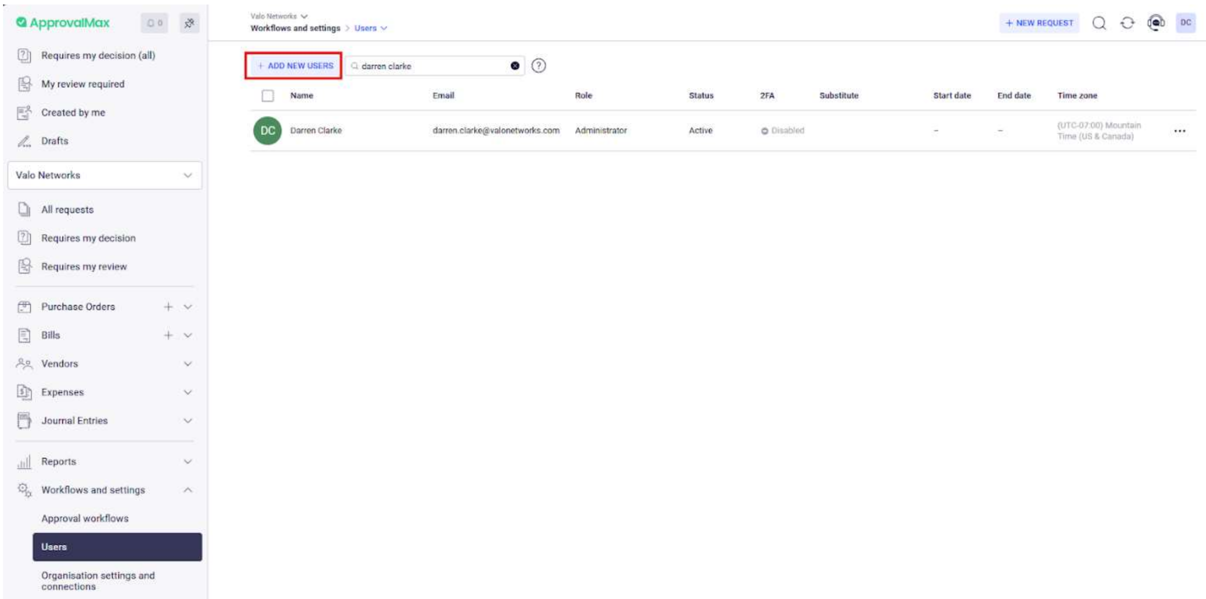

Figure 28: Workflows and settings screen with "add a new user" button highlighted.

You will be prompted to enter the email address for the user you are adding.

Select “add” when done – the user will show in the list when they have accepted the request and setup their account.

To change the role of a user already set up in ApprovalMax, select their role to open the dropdown list of available user roles.

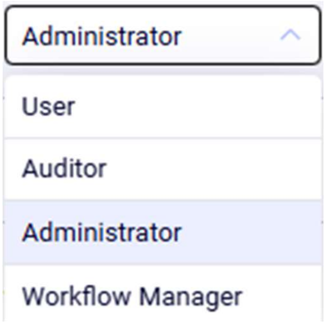

Figure 29: User screen with role dropdown screen.

Select the new role you would like this user to have. Their role will now be confirmed, and you will have to make any necessary changes to any workflows they are included in.

To off-board a user, select the three dots icon at the right side of the user's row, then select "off-board".

You will be prompted to go through the off-boarding process of removing users from any workflows in which they are included.