



EQUIPPING OUR PARTNERS FOR SUCCESS

Your path to practice acceleration: The ApprovalMax Partner Playbook

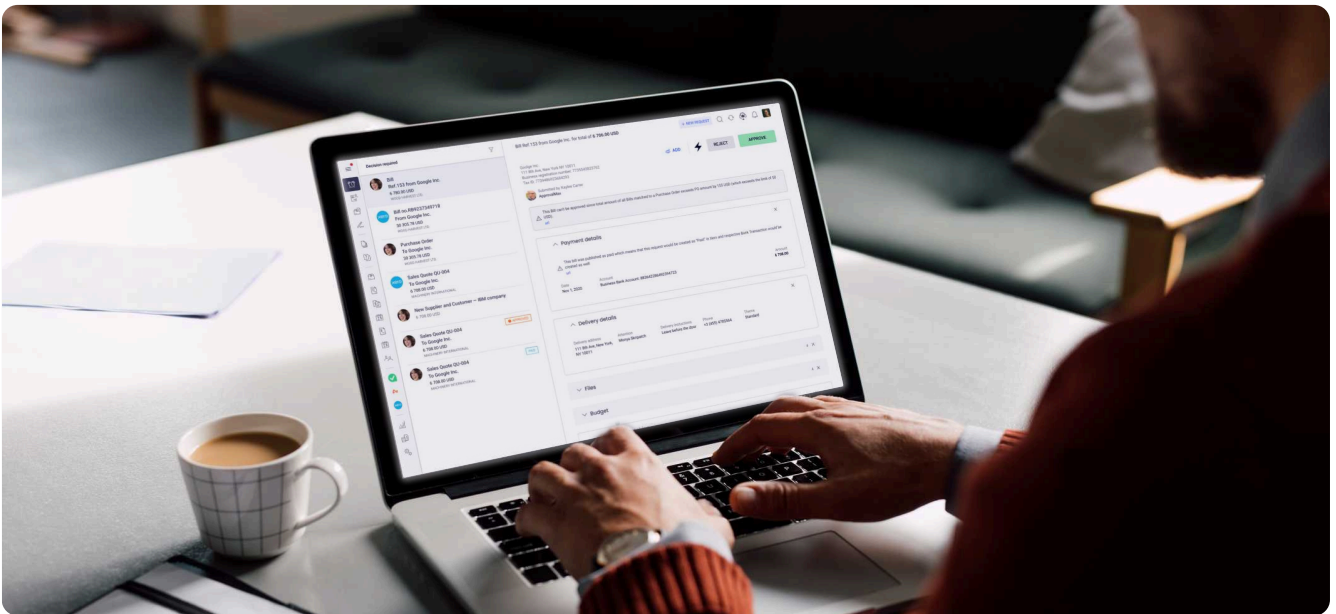


Learn how ApprovalMax can help you to unlock new opportunities, strengthen your client relationships, and level up your practice.

Welcome to the ApprovalMax Partner Program

As a valued partner, we've put together industry-leading tools, resources, and rewards to help you deliver more for your clients – and your practice.

ApprovalMax helps businesses boost their financial controls with you, by streamlining approval processes and enabling smarter decision making. By joining our Partner Program, you become part of our global community of forward-thinking firms mastering approval automation for greater AP and AR efficiency, compliance, and client satisfaction.



ApprovalMax's Partner Program is designed to ensure you and your clients are tapping into automation to save maximum time and effort. Whether you're managing financial controls for clients, or helping them with their tech stack, ApprovalMax is here to support you every step of the way.

Greg Bithrey, Head of Customer Success, ApprovalMax

How is this Partner Program different?

The ApprovalMax Partner Program offers useful benefits, tailored to help you grow, while adding more to each client experience.

Program benefits



Valuable discounts

Unlock bigger savings as your client base expands.



Dedicated support

Access exclusive resources and expert assistance from our Partner Success Team.



Training & certification

Stay up to date with on-demand training sessions, learn about our newest features, and gain CPD/CPE credits.



Referral fees

Earn rewards for introducing select new clients to ApprovalMax.

Discounts and tiers

From Bronze to Platinum, our tiered program structure grows with you, with more rewards as you expand your client base using ApprovalMax.



ApprovalMax has tremendously improved the efficiency of our invoice approval process, allowing both the finance admin team and department leaders to enjoy a centralised system to access, manage, and review all vendor bills. It has saved a lot of hours for everyone!



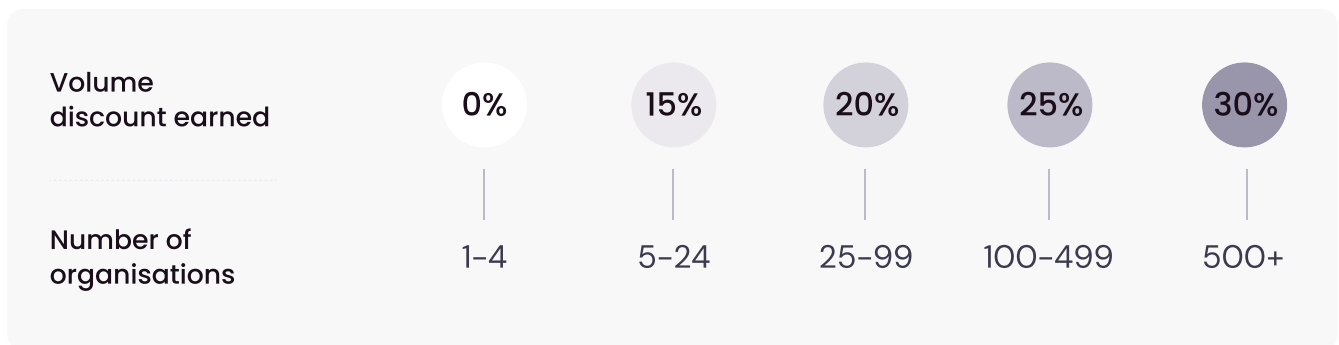
Ivy He
Financial Controller, illumin

Get the most value out of ApprovalMax for your practice

ApprovalMax provides a variety of benefits for partners of all sizes.

Volume Discounts

All of your clients now count towards a single volume discount with ApprovalMax, regardless of their subscription type. This discount automatically goes up as your client list using ApprovalMax grows.



Tiered Benefits

Our tiered partner levels provide an easy way to take part and offer more rewards for your loyalty. We welcome accounting and bookkeeping practices of all sizes to join our growing program and unlock more benefits and discounts* with ApprovalMax. Check out the different partner tier to see which one fits you best.



Bronze

0% discount

Qualifying criteria

- Firm offers accounting, bookkeeping, treasury, payroll, audit, or reporting services
- 1-4 paid organisations actively using ApprovalMax under your partner account

Additional benefits

- Access to partner portal
- 60 minute onboarding session
- Partner support via phone, Zoom, or email
- Certification Badges
- Practice Staff access

Status retention requirements

1-4 paid organisations actively using ApprovalMax under your account



Silver

10% discount

Qualifying criteria

- 5-24 paid organisations actively using ApprovalMax under your partner account
- 2 certified practice staff

Additional benefits

Everything in Bronze, plus:

- Quarterly Business Reviews
- Success roadmap
- A free demo organisation in ApprovalMax

Status retention requirements

5-24 paid organisations actively using ApprovalMax under your account and a minimum of 2 certified practice staff



Gold

20% discount

Qualifying criteria

- 25-49 paid organisations actively using ApprovalMax under your partner account
- 2 certified practice staff

Additional benefits

Everything in Silver, plus:

- Monthly partner success team calls
- A free partner organisation in ApprovalMax
- Partner directory profile (coming soon)
- In-person Quarterly Business Reviews*

Status retention requirements

25-49 paid organisations actively using ApprovalMax under your account and a minimum of 2 certified practice staff



Platinum

30% discount

Qualifying criteria

- 50+ paid organisations using ApprovalMax under your partner account
- 2 certified practice staff

Additional benefits

Everything in Gold, plus:

- Marketing content collaboration
- Exclusive product webinars for your team

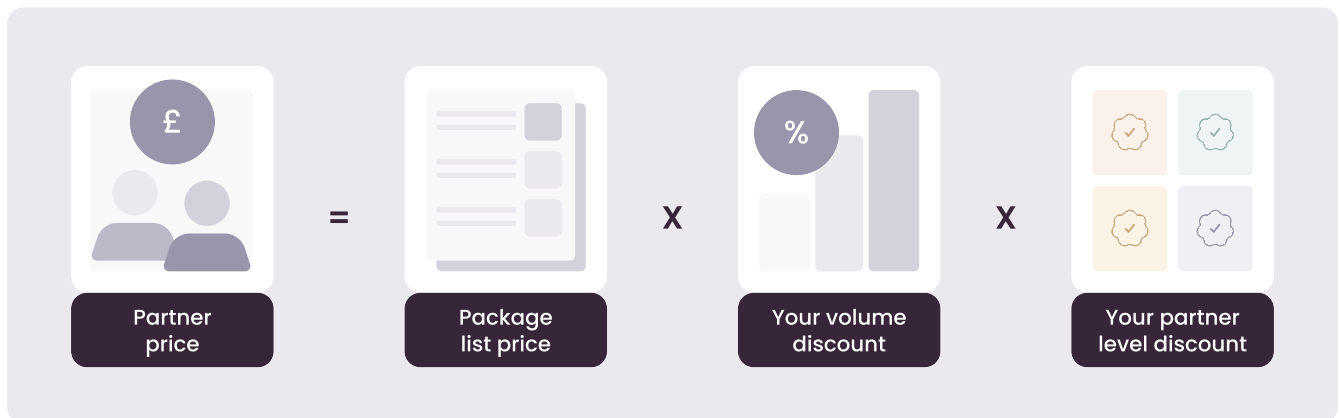
Status retention requirements

50+ paid organisations actively using ApprovalMax under your account and a minimum of 2 certified practice staff

Calculating your discount

Our total discounts are a combination of your volume discount and your Partner Tier discount. Both are based on the total number of paid organisations using ApprovalMax under your account. Your discount is calculated by first applying the Volume discount and then the Tier level discount.

To understand this calculation, let's take our partner AccountantsRUs as an example. AccountantsRUs is a medium-sized accounting firm with 12 paid client subscriptions, which puts them in our Silver Tier. Each subscription would normally cost £39.00 a month for each client. Their volume discount of 15% brings their per-entity cost to £33.15. As they also qualify for our Silver Tier pricing, adding 10% discount on top of the volume discount, each subscription will cost £29.835 saving the partner and clients money.



Our 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 can 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:

- A Xero or Quickbooks Online client with a minimum of 3 organisations: £230
- A NetSuite client: £1,000

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 ApprovalMax referral program if you require more information. Please refer to your agreement for all terms and conditions.

Partner Requirements

Joining the ApprovalMax Partner Program is easy. We do request that you meet our minimum criteria in order to take advantage of our benefits:

- Your firm provides financial services including accounting, bookkeeping, treasury, payroll, audit, or reporting.
- You have at least one paid organisation using ApprovalMax under your account (e.g. One active organisation with a paid subscription).
- A signed partner agreement (we provide you with this).
- At least two ApprovalMax certified staff to receive Silver, Gold, and Platinum partner tier benefits.

Every month, your partner status will be automatically reviewed based on your paid capacity. Certification criteria also plays a role in maintaining your partner status and discounts.

Training & Certifications

Uncover all that ApprovalMax offers through on-demand training and certification via our Partner Portal. Learn at your own pace, pause at any time, and pick up again when it suits your schedule. Once completed, you will receive a downloadable certificate and badge upon passing. All sessions are available via the Learning and Certification section on the ApprovalMax Partner Portal. Our certification sessions contribute to your CPD/CPE accreditation. We encourage you to participate and gain your certification to unlock all of the useful functions for your financial controls available.

Have questions?

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



What our partners told us

In October 2024, we asked 50 of our partners about their experience using ApprovalMax. Here are the top five overall benefits that our partners experience with ApprovalMax:

Most clients don't realise they need approval automation

A surprising number of businesses face inefficiencies in their approval processes, making automation not just a 'nice to have' but essential. ApprovalMax solves this widespread problem.



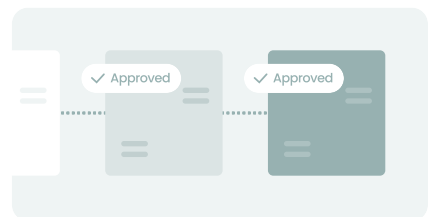
Clients can manage segregation of duties with ApprovalMax

Building strong financial control is a priority for businesses aiming to reduce fraud and errors. ApprovalMax not only helps set up robust financial controls, it makes it easy to follow them.



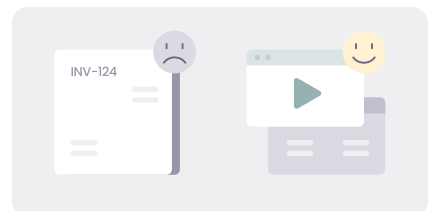
Clients significantly benefit from removing manual approval processes

Getting rid of manual workflows makes a huge difference for partners who want to automate their clients' processes.



Clients benefit from all of the features provided by ApprovalMax at cost

Many partners structure the cost of their services to include the monthly investment in ApprovalMax, highlighting the return on investment that clients can expect.



Partners save time and money with ApprovalMax

Automation unlocks time savings for both our partners and your clients. Save time and stay productive with ApprovalMax.



So how do we help our partners?

- ✓ We save you hours every week by automating approval workflows
- ✓ We help reduce manual errors, boosting compliance and audit readiness
- ✓ Around the world every 2.5 seconds, a bill is being pushed into ApprovalMax

ApprovalMax isn't just a useful tool for you – it strengthens your clients' financial controls.

Let's help your clients build stronger financial controls

We've put together some of the most common challenges that clients experience and how ApprovalMax helps overcome them.



- **Your client has time-consuming manual processes**

ApprovalMax saves hours of manual effort each week by automating approval processes.

- **Your client doesn't have any visibility during approval processes**

Most of our of partners report improved visibility for their clients with ApprovalMax.

- **Your client doesn't have strong financial controls, which can lead to compliance risks**

With ApprovalMax, audit trails are automatically generated for every approved document, which helps reduce audit preparation and stress.

- **Your client suffers from approval delays, which can slow down payment runs and affect timely cash flow reporting**

Using ApprovalMax sees an average of **25% of bills approved in less than 2 hours, and 50% approved in less than one day.**

- **Your client underestimates the power of quick and automated approval processes**

ApprovalMax scales with your business so your processes grow with you without adding additional manual effort.

Finding your ideal clients

Checklist: How to know when your clients need approval automation?

- ✓ Do your clients need to process more than 30 bills monthly?
- ✓ Are there decision-makers spread across multiple locations?
- ✓ Do approval delays impact their payment operations and accuracy of financial reporting?
- ✓ Are manual processes prone to errors or inefficiencies?



Why these questions matter

- Streamlined workflows save time and reduce stress.
- Automation supports growth without sacrificing compliance.

Five key takeaways about ApprovalMax

1

ApprovalMax gives you and your clients peace of mind on payment authorisations

We don't just recommend software to streamline your work; we offer for solutions that save you time, reduce your costs, and improve financial control for you and your clients.

2

ApprovalMax helps strengthen trust between you and your clients

ApprovalMax prevents costly errors and fraud, which can save your clients money in the long run and protect them from financial mishaps.

3

ApprovalMax is easy to use

ApprovalMax is easy to set up and use, even if you're not tech-savvy. We can help walk through your setup and provide ongoing support to make sure everything is running smoothly.

4

ApprovalMax can help your practice scale and grow

ApprovalMax grows with you. Whether you're handling 30 bills a month or 300, our system scales to your needs without overhauling your processes.

5

ApprovalMax gives you cost-effective financial controls to prevent errors and fraud

ApprovalMax reduces the risk of errors, missed approvals, and fraud, saving your business far more than its cost. Partnering with us means you get a cost-effective, scalable solution to provide financial controls, so you can focus on growing your practice.

Handy marketing resources to help you out

As a valued ApprovalMax partner, you have unlimited access to a wealth of marketing resources to educate your clients on financial controls and choosing the right tech stack:

Videos

Expert webinars, tutorials, and product demonstrations.

Case studies

Real-world examples of how other partners have used ApprovalMax to achieve success.

Marketing support

Templates, infographics, slide decks, and plenty of co-branded ApprovalMax content to help you and your clients with understanding and implementing stronger financial controls.

One-pagers

Quick reference materials about ApprovalMax to share with clients.

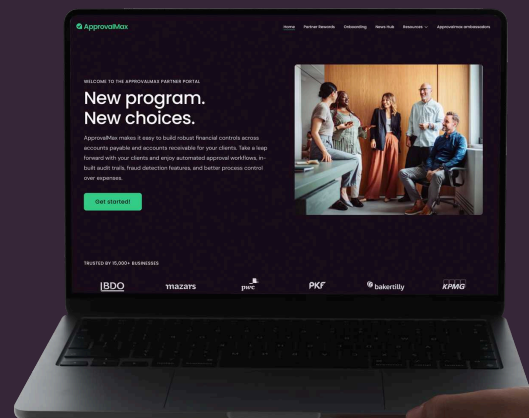
Trials and demos

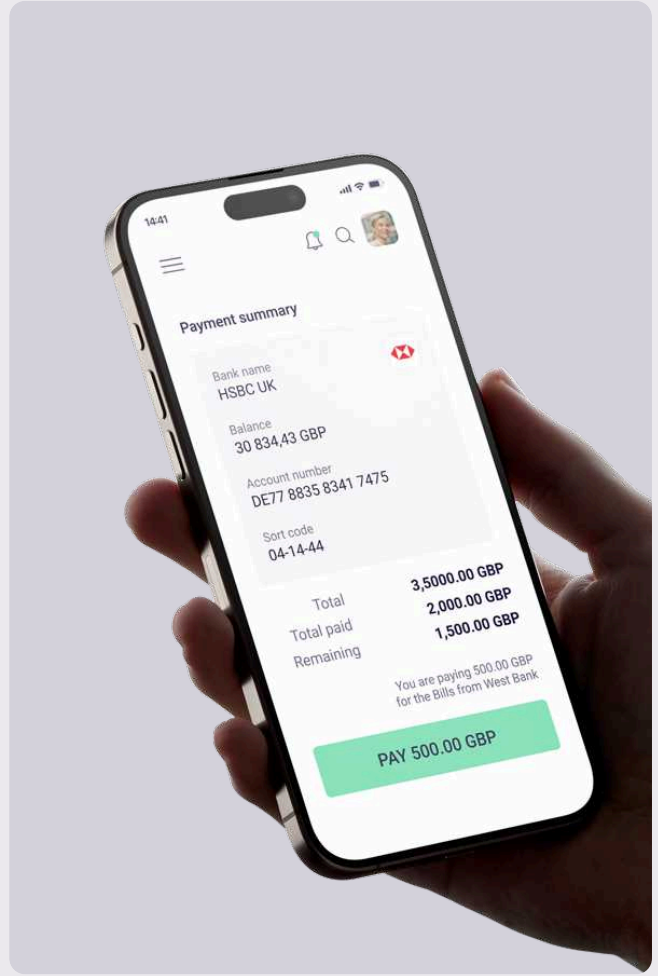
Live and recorded demos about ApprovalMax and free trials are available for you and your clients.

CONTACT US

Everything you need is all in one place and accessible anytime on ApprovalMax's partner portal.

Have questions? Need support? Reach out to your Partner Success Manager or explore the Partner Portal for more resources.





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.




Xero Community Rating




UK App Partner of the Year (2020, 2021)



NZ App Partner of the Year (2020, 2022)




QuickBooks Online App Store Rating