

 ApprovalMax

September 2023

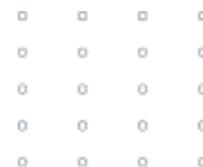
Approver Guide for NetSuite

Cloud Approval Workflows for Finance and Accounting

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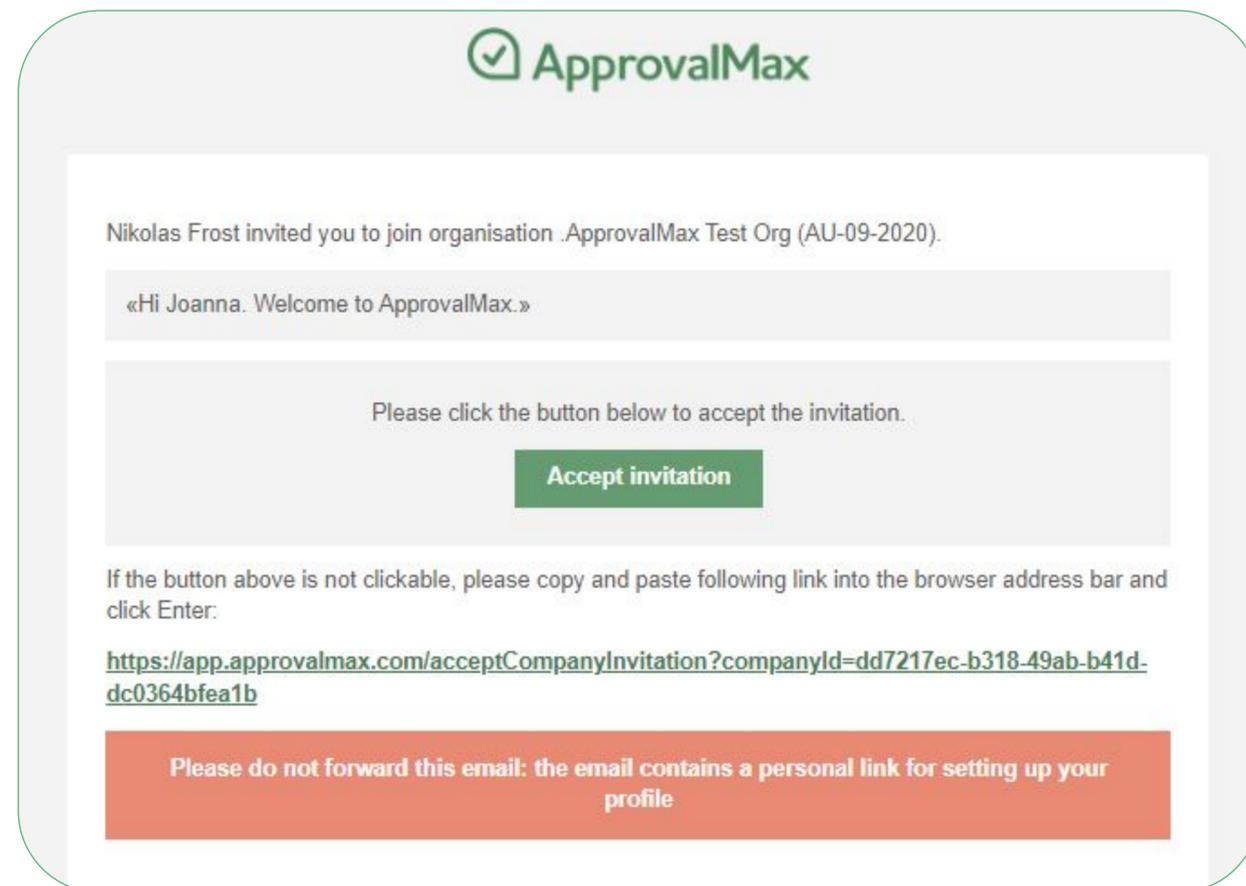
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Accept an invitation

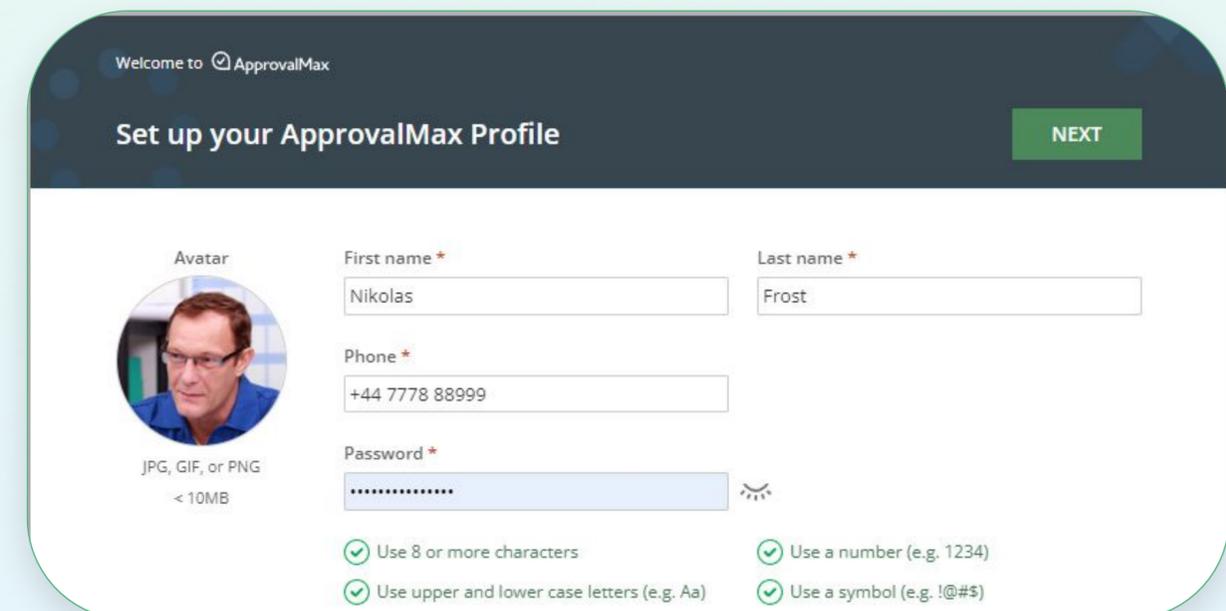
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All invited users need to accept the invitation to join an Organisation



The screenshot shows an email invitation from ApprovalMax. At the top is the ApprovalMax logo. The main text reads: "Nikolas Frost invited you to join organisation .ApprovalMax Test Org (AU-09-2020)." Below this is a grey box containing the message: "«Hi Joanna. Welcome to ApprovalMax.»". Underneath is another grey box with the instruction: "Please click the button below to accept the invitation." A green button labeled "Accept invitation" is centered in this box. Below the button, there is a note: "If the button above is not clickable, please copy and paste following link into the browser address bar and click Enter:" followed by the URL: <https://app.approvalmax.com/acceptCompanyInvitation?companyId=dd7217ec-b318-49ab-b41d-dc0364bfea1b>. At the bottom, a red banner contains the text: "Please do not forward this email: the email contains a personal link for setting up your profile".

... and enter their personal data (first name, last name and the password).

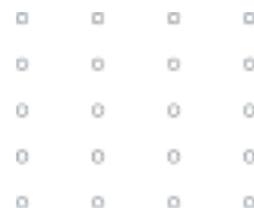
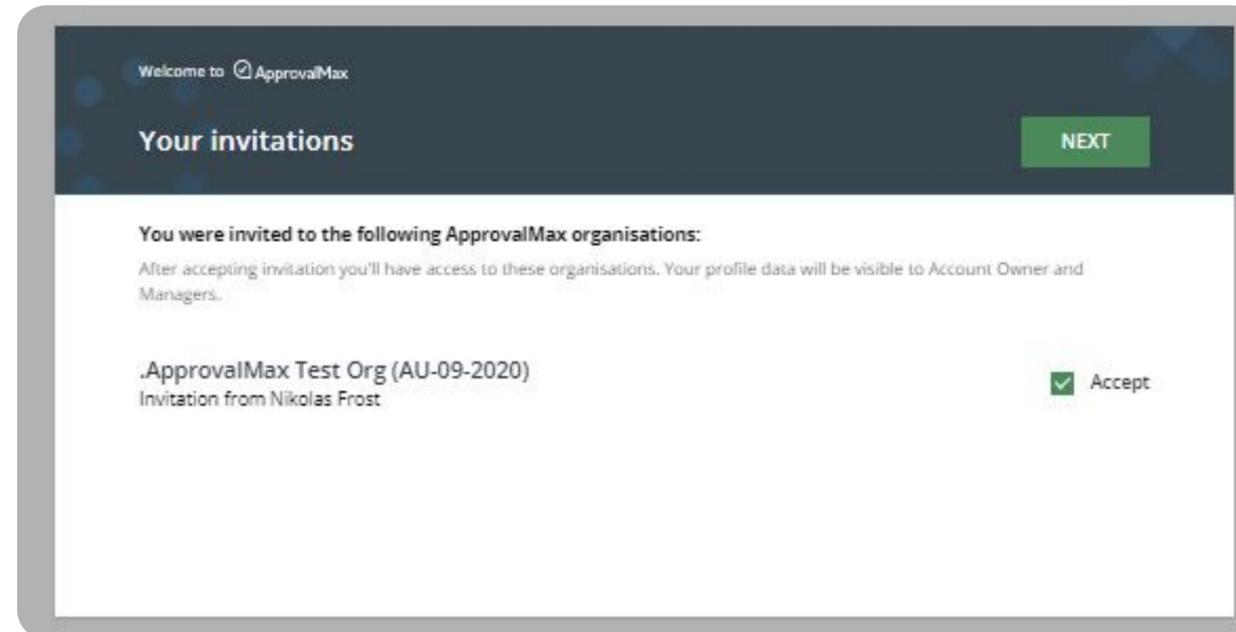
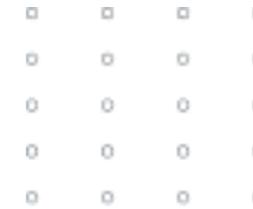


The screenshot shows the "Set up your ApprovalMax Profile" form. At the top, it says "Welcome to ApprovalMax" and "Set up your ApprovalMax Profile" with a green "NEXT" button. The form includes an "Avatar" section with a circular image of a man and the text "JPG, GIF, or PNG < 10MB". To the right are input fields for "First name *" (containing "Nikolas") and "Last name *" (containing "Frost"). Below these is a "Phone *" field containing "+44 7778 88999". The "Password *" field is masked with dots and has a visibility toggle icon. At the bottom, there are four password requirements, each with a green checkmark: "Use 8 or more characters", "Use a number (e.g. 1234)", "Use upper and lower case letters (e.g. Aa)", and "Use a symbol (e.g. !@#\$)".

Accept an invitation

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If you get multiple invitations, choose for which Organisations you want to accept the invitation.



Change your name, contact details or the notification and security settings

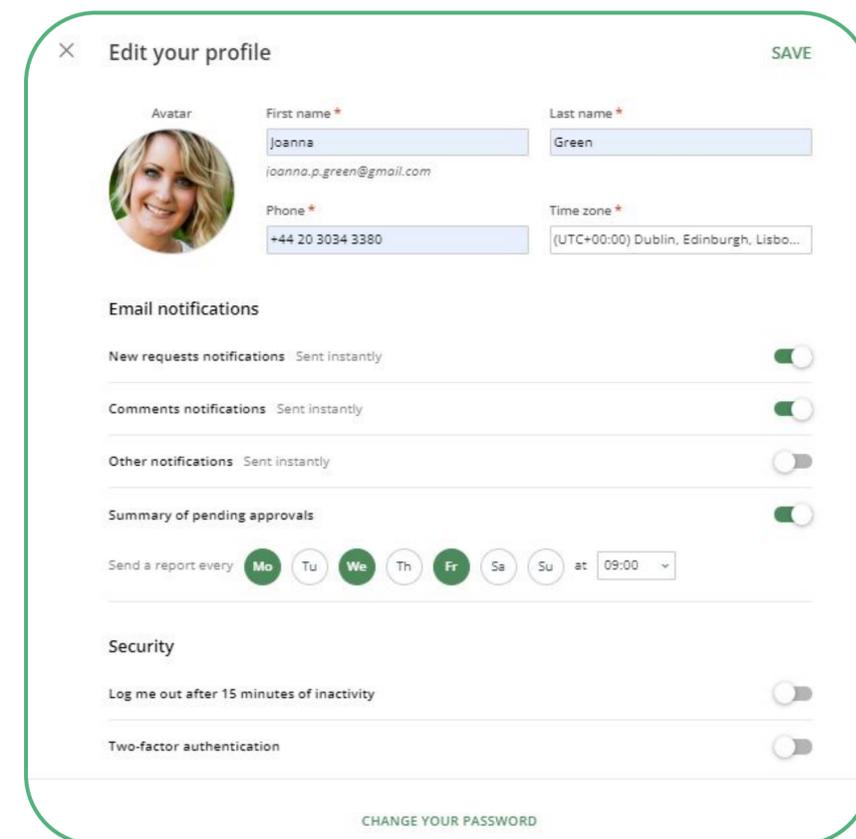
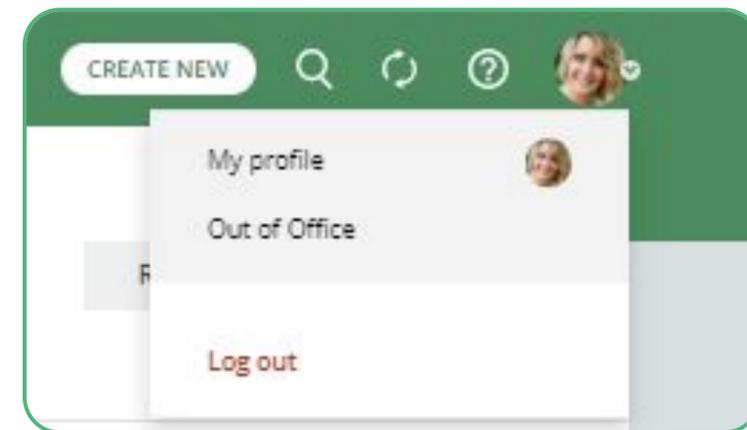
Users can change their name, password and time zone, upload an avatar or add a phone number any time.

To do so, click on the avatar icon in the top right-hand corner of the main page to open **My Profile**.

Here, you can set the notifications too: instant notifications about new requests or comments and a daily request summary with a list of all requests pending your approval.

This page is also about your notification preferences regarding approval decisions or comments as well as security settings such as **logout on inactivity** and **two-factor authentication**.

Please note: there is no option to reset the email address.



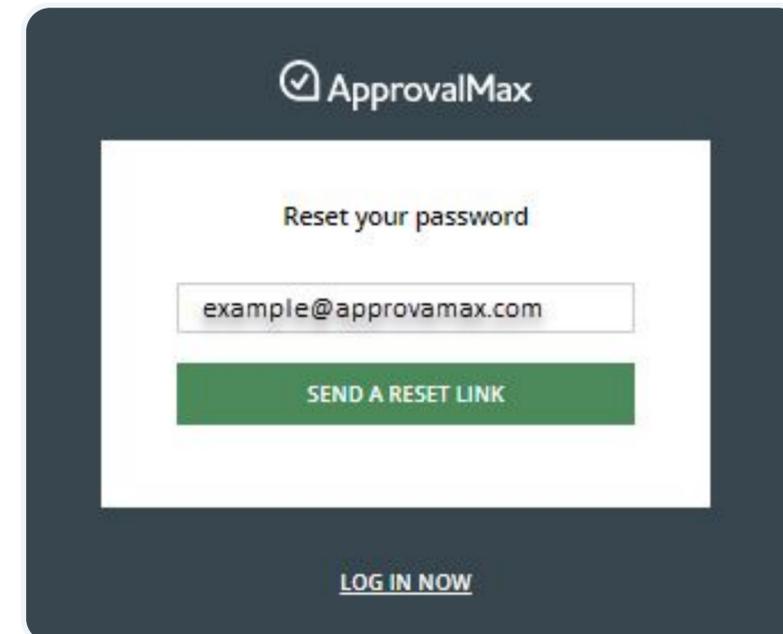
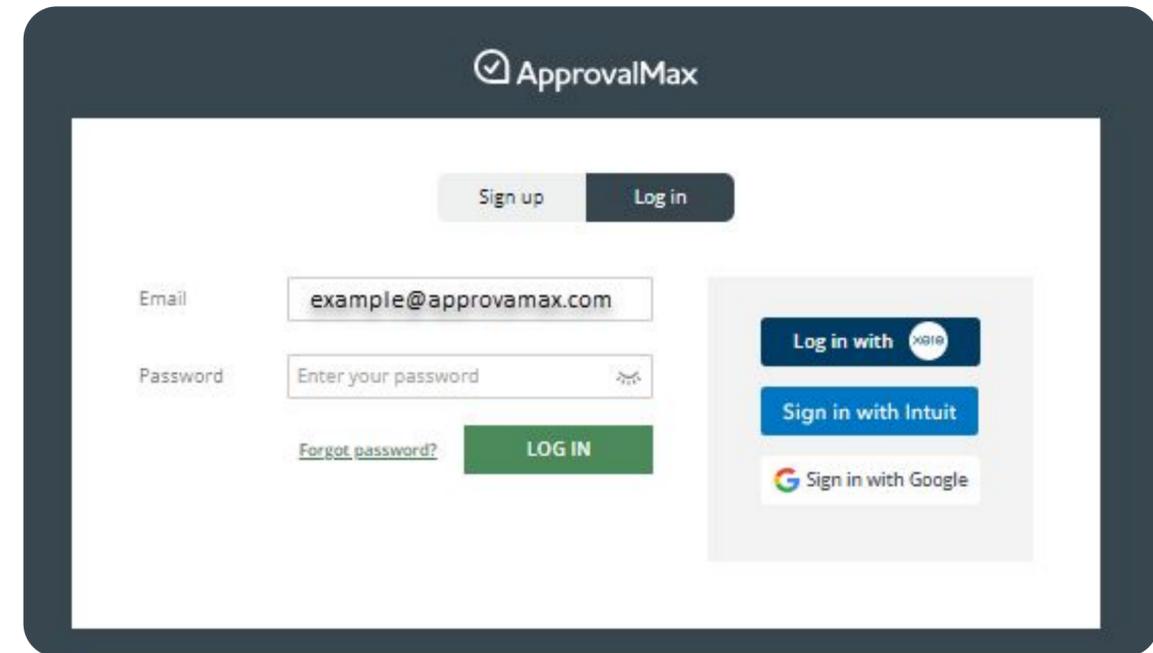
Reset your password



Resetting a forgotten password is easy in ApprovalMax.

Clicking the **Forgot Password?** button on the log-in page and entering your email address is all it takes.

An email will be sent out instantly, it contains a link to **My Profile** where you can set a new password.



Enable Two-Factor Authorisation



Using 2FA protects from unauthorised access to a person's account and increases data security. Due to Xero requirements, ApprovalMax enforces 2FA for all users that access Xero-connected Organisations.

- Open “My Profile” and click on the  button to enable two-factor authorisation
- Enter the shared secret generated by ApprovalMax in the authenticator application and after an authentication code has been generated enter that in ApprovalMax
- Provide an alternative email address and confirm it



× Edit your profile SAVE

Avatar
ulyana.kizilova@approvalmax.com

Phone * Time zone *

Email notifications

New requests notifications Sent instantly

Comments notifications Sent instantly

Other notifications Sent instantly

Summary of pending approvals

Send a report every at

Security

Log me out after 15 minutes of inactivity

Two-factor authentication

SET NEW PASSWORD

× Two-factor authentication setup

Download the app Enter the code Add and confirm the email address

Enter the code from the Authenticator app

Enter the 6-digit code generated by the Authenticator app. If you experience problems with entering this code, please refer to our [support article](#).

Authenticator code

Set an out-of-office period



For out-of-office times, Approvers can name a Delegate who will take over their approval requests.

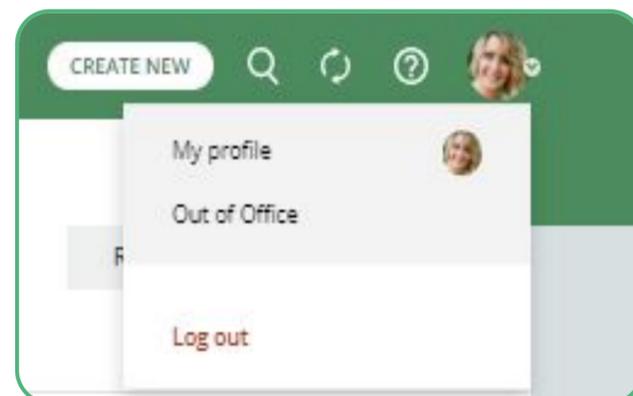
For this, click on **Out of Office** under your avatar in the upper right-hand corner.

It is possible to set a date range for the delegation of approvals. If you state an end date, the out-of-office period will be disabled accordingly.

Once a Delegate has been specified, you as the original Approver won't be notified about pending approvals as all such requests will be rerouted to this Delegate.

When you've returned to work and the Out-of-Office feature has been switched off, all approval requests that are still pending will be redirected to you.

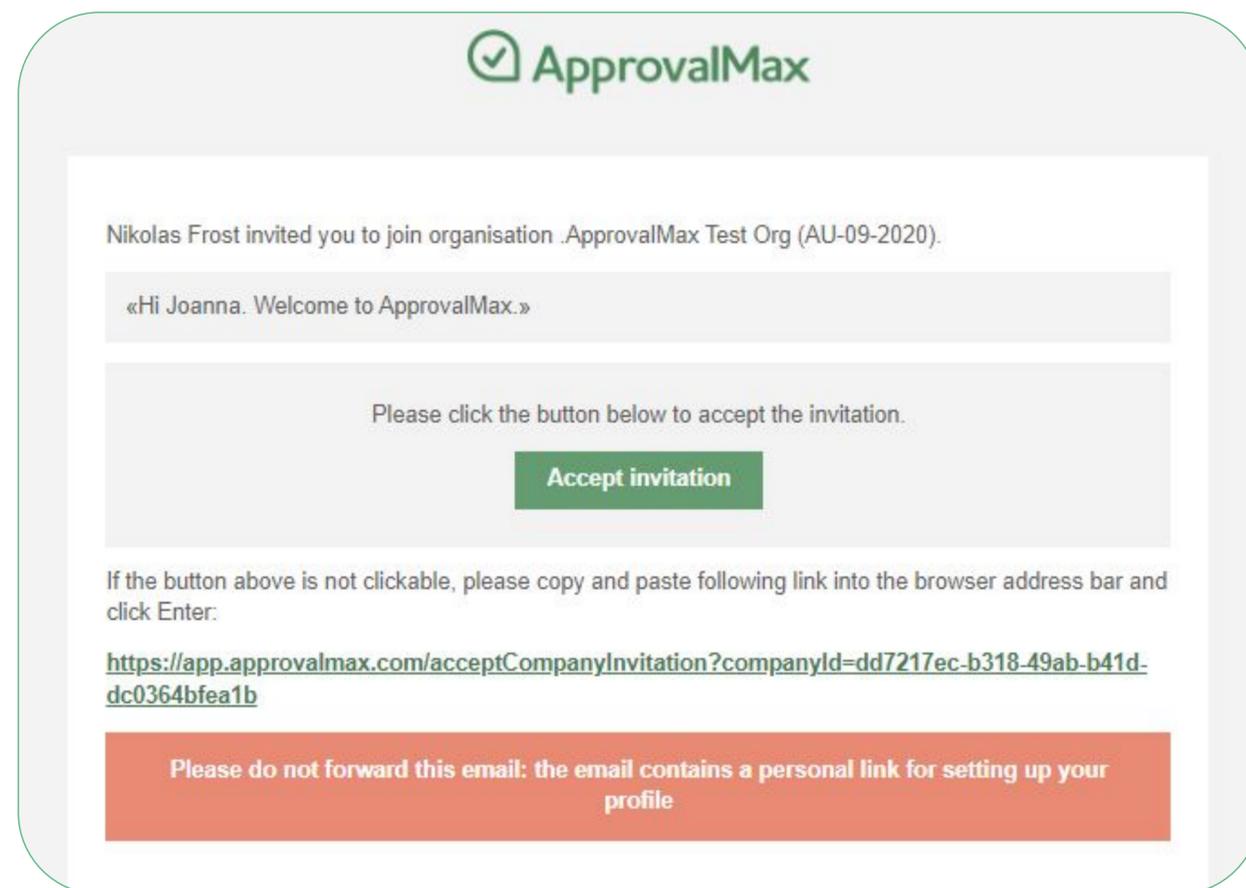
ORGANISATION	DELEGATE	START DATE	END DATE
ApprovalMax Test Org (AU-09-2020)	Beverly Wheeler	24 Nov 2022	30 Nov 2022
Netsuite	Select a Delegate	Start date	End date
QuickBooks Online with Dext	Joanna Green	24 Nov 2022	30 Nov 2022
Standalone Organisation	Select a Delegate	Start date	End date
Xero	Select a Delegate	Start date	End date



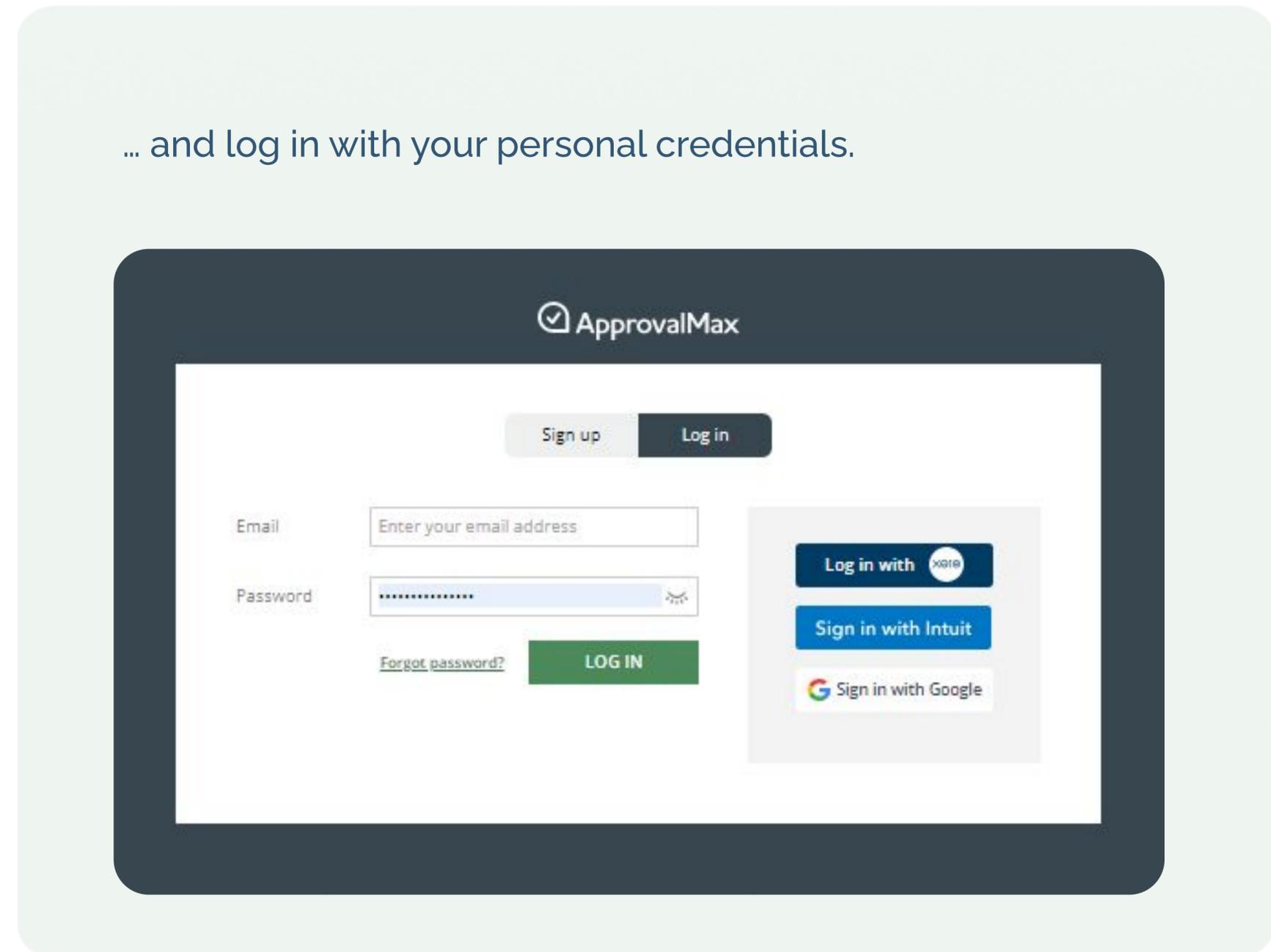
Please note: a Delegate won't see requests previously approved by the original Approver.

Accept an invitation to an additional Organisation 1.1

You can be added to any number of Organisations, just accept the invitations to additional Organisations

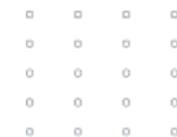
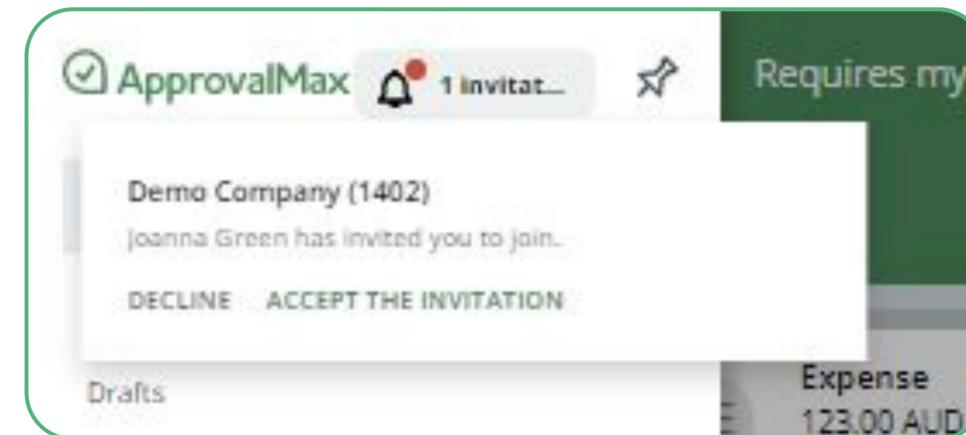
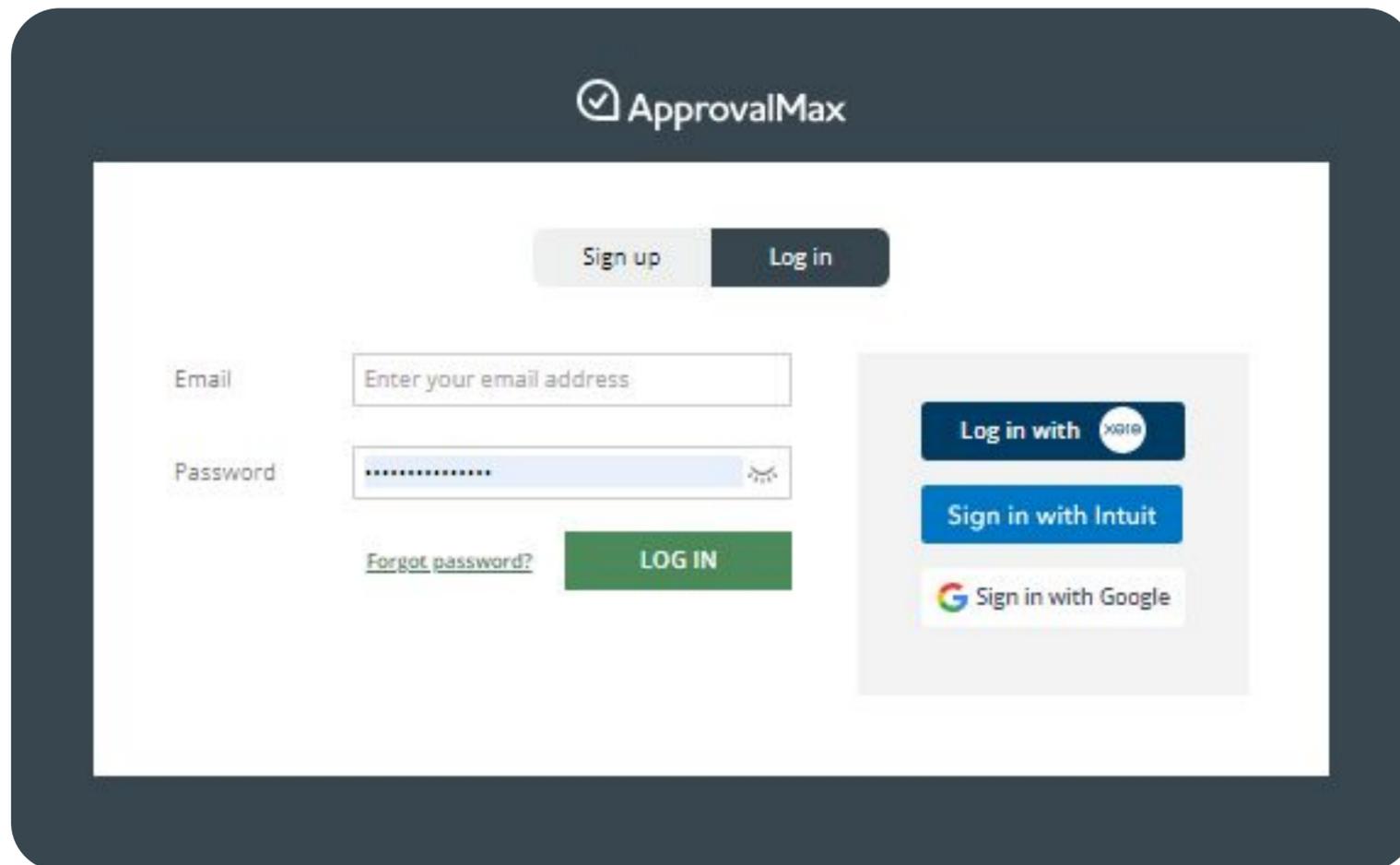


... and log in with your personal credentials.



Accept an invitation to an additional Organisation 1.2

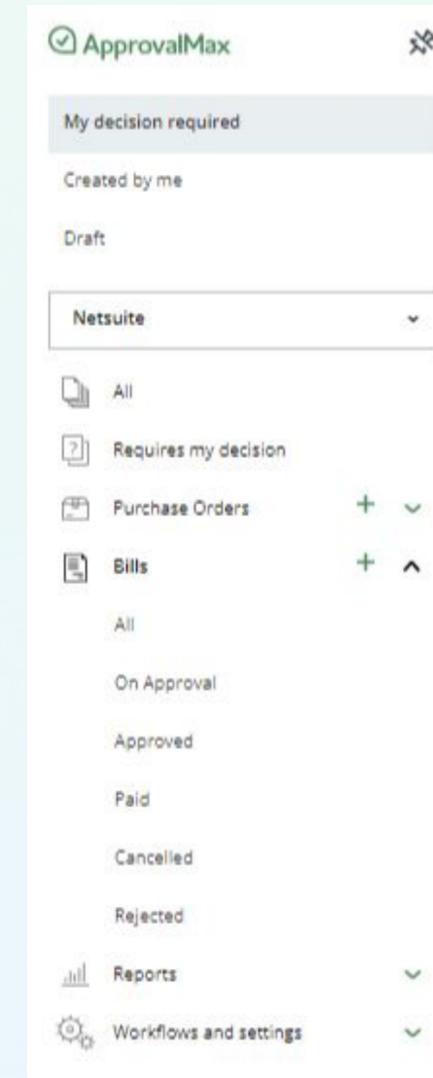
Or, you can log into your account and accept the invitations directly in ApprovalMax, you'll find them in the menu on the left.



Approval request lists

There are several request lists for Approvers:

- The **Requires My Decision** list shows the Approver all requests pending their approval, across all Organisations to which this user was invited.
- In the **All** list the Approver sees all requests assigned to them based on the approval matrix, including the ones that were already approved (approval history).
- If an Approver has been added to several workflows such as for Bills/Purchase Orders, etc, he or she will find sections that list the different request types filtered by their status (e.g. Rejected, Cancelled, Approved, Paid).



Approval request view

The approval request view displays the following information:

- Line item details
- Document attachments
- A progress bar with information about the previous and the following steps
- Status of the approval
- Related discussions, etc.

The screenshot shows the Netsuite interface for an approval request. The top navigation bar includes 'Netsuite > Decision required' and a 'CREATE NEW' button. The main content area is divided into two columns. The left column displays a list of related documents, including 'Vendor Bill from (7-11) Company' and 'Purchase Order to (7-11) Company', with their respective amounts in British pounds. The right column provides details for the selected 'Purchase Order to STARK INC' (8,994.00 British pound). It includes a 'REJECT' and 'APPROVE' button, a 'Transaction Number' of 853, and a 'Date' of 17 Apr 2023. Below this is an 'ITEMS' table with columns for Item, QTY, Units, Description, Rate, Amount, Tax code, Tax rate, Tax amount, and Expected Receipt Date. The table shows one item: '109F Solid Women's Tunic' with a quantity of 1.00 and a rate of 8,994.00. A summary table shows a total amount of 8,994.00 British pound. The 'APPROVAL WORKFLOW' section shows an 'Approval step' that is 'ACTIVE' and an approval condition of 'All'. The 'AUDIT TRAIL' section shows a log entry: 'Pulled the request from Oracle NetSuite' on 18 Apr 2023 09:35. At the bottom, there is a 'Leave a comment' field.

IMPORTANT: Approvers in ApprovalMax can only see those approval requests that are assigned to them.

Approve/reject from an email notification

Approvers can approve or reject requests from:

- the email notification
- their account in a web browser
- the mobile app

To approve or reject a request, simply click on the respective button.

Approvers can leave an explanatory comment when making their decision.

Hello Ulyana,
Nataliya Efremova has submitted [Bill from 24 Locks](#)

12.99 USD Bill

DEMO COMPANY (1402)

From	Date	Due Date	Reference
24 Locks	16 Feb 2022	28 Feb 2022	-

Item	Description	Qty	Unit Price	Disc %	Account	Tax	Amount USD
GB3-White: Golf balls - white 3-pack	Golf balls - white 3 pack. Wholesale catalog item #020812-3	1.00	12.00	-	300 - Purchases	Tax on Purchases (8.25%)	12.00

Amounts are Tax Exclusive
Subtotal: 12.00 USD
Total Tax (8.25%): 0.99 USD
TOTAL: 12.99 USD

WORKFLOW

Current workflow step: Approval step. Approvers: Joanna Green, N N, ulyana.kizilova+3@approvalmax.com, Ulyana Kizilova

What's your decision, Ulyana?

←

What's your decision, Ulyana?

← If you reply on this email, you have three options:

- Type any text and it will be added as a comment to this request.
- Reply with the single word «**Approve**» and request will be approved.
- Reply with the single word «**Reject**» and request will be rejected.

BILL TO PO MATCHING
(Actual as of 16 Feb 2022 14:26)

100.00 USD remaining

Name	Allocated Amount to PO
Purchase Order PO-0012 to 24 Locks	0.00 USD
Total allocated:	0.00 USD
Remaining amount:	100.00 USD

System information

RequestId:4bfb1d88-244c-4774-8f80-8f73a14340f4
StepId:a6130551-5725-4df1-83ad-5ec5efdc453b
Version:4

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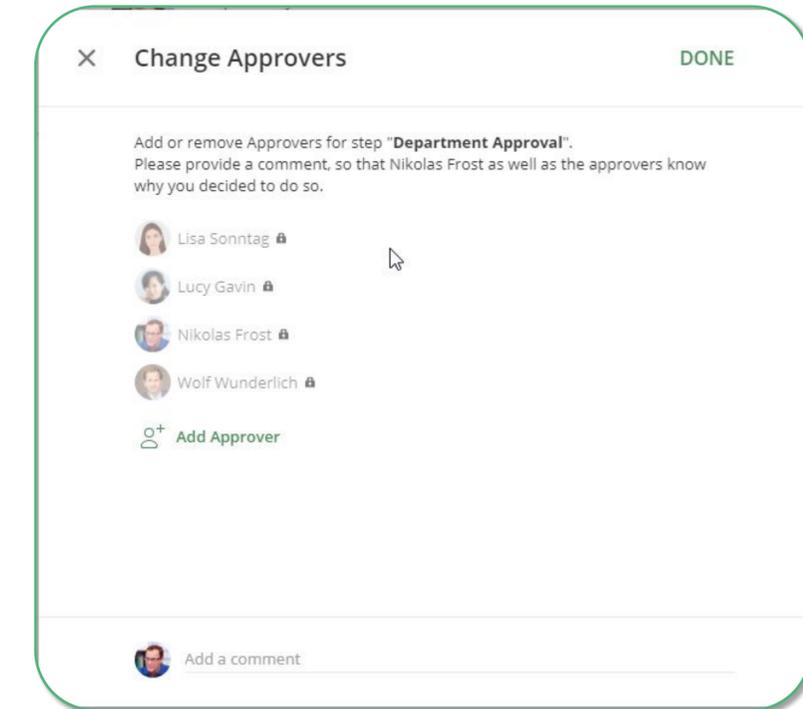
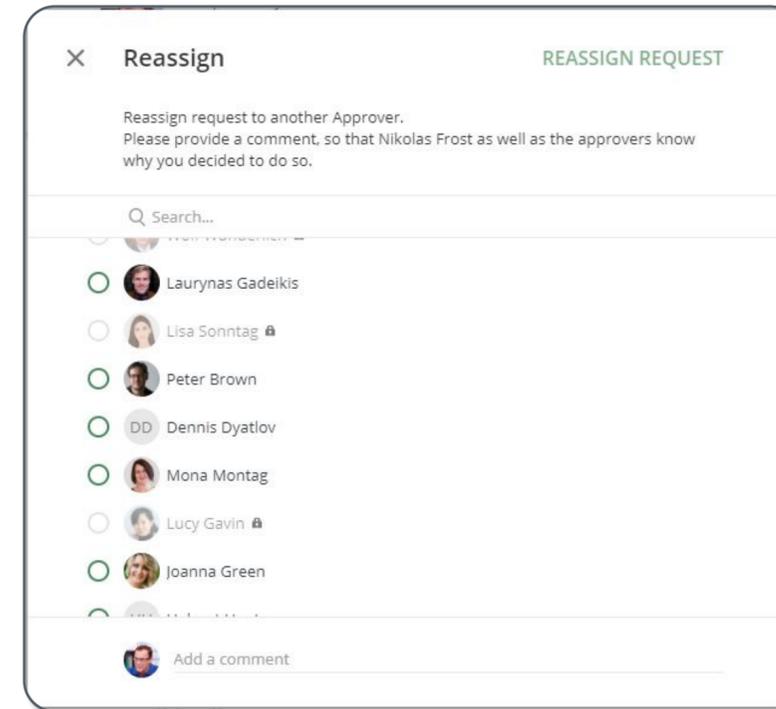
Reassign an approval request, add Approvers

As an Approver, you can reassign an approval request to a different Approver and also add additional Approvers to this request.

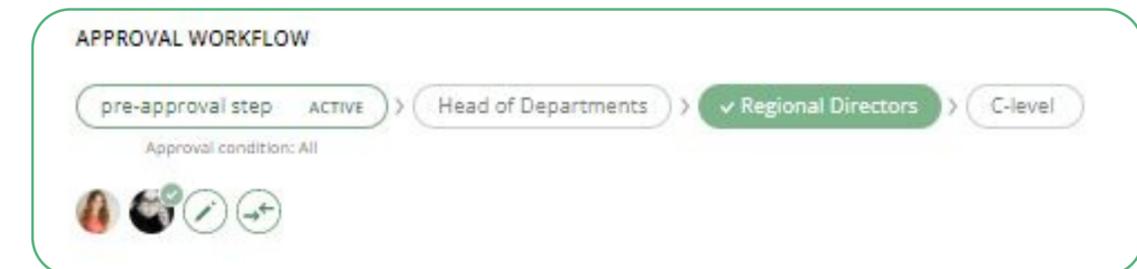
To reassign an approval request to a different Approver, click on the **Reassign** button  and select a new Approver.

To add an additional Approver, click on the **Change** button .

Don't forget to add a comment and let others know the reason for your decision.



Please note: you can only add another Approver if the workflow step has the "All" approval condition. If the "Any of" approval condition has been selected for it, the Change Approvers button is not available.

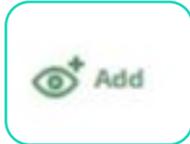


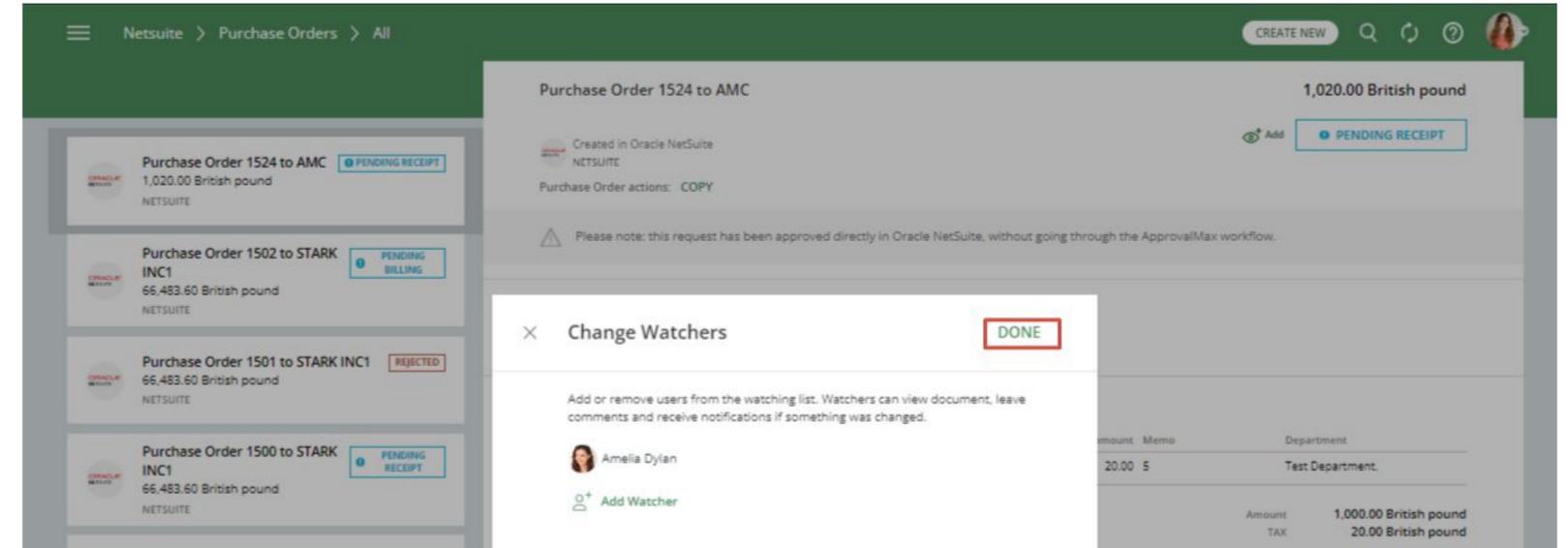
Add Watchers

The "Watchers" functionality in ApprovalMax allows users to closely monitor and stay informed about specific approval requests within the system.

When a user is assigned as a "Watcher" for a particular request, they will receive notifications and updates regarding the progress and status of the approvals, even if they are not directly involved in the approval process.

The Watchers functionality aims to provide visibility and engagement for users who need to stay up-to-date on specific approval processes without the need for direct involvement.

- To choose a Watcher, click on the  button.
- Click on the "Add Watcher" button and select a Watcher from the list
- When all required Watchers have been added, click on DONE

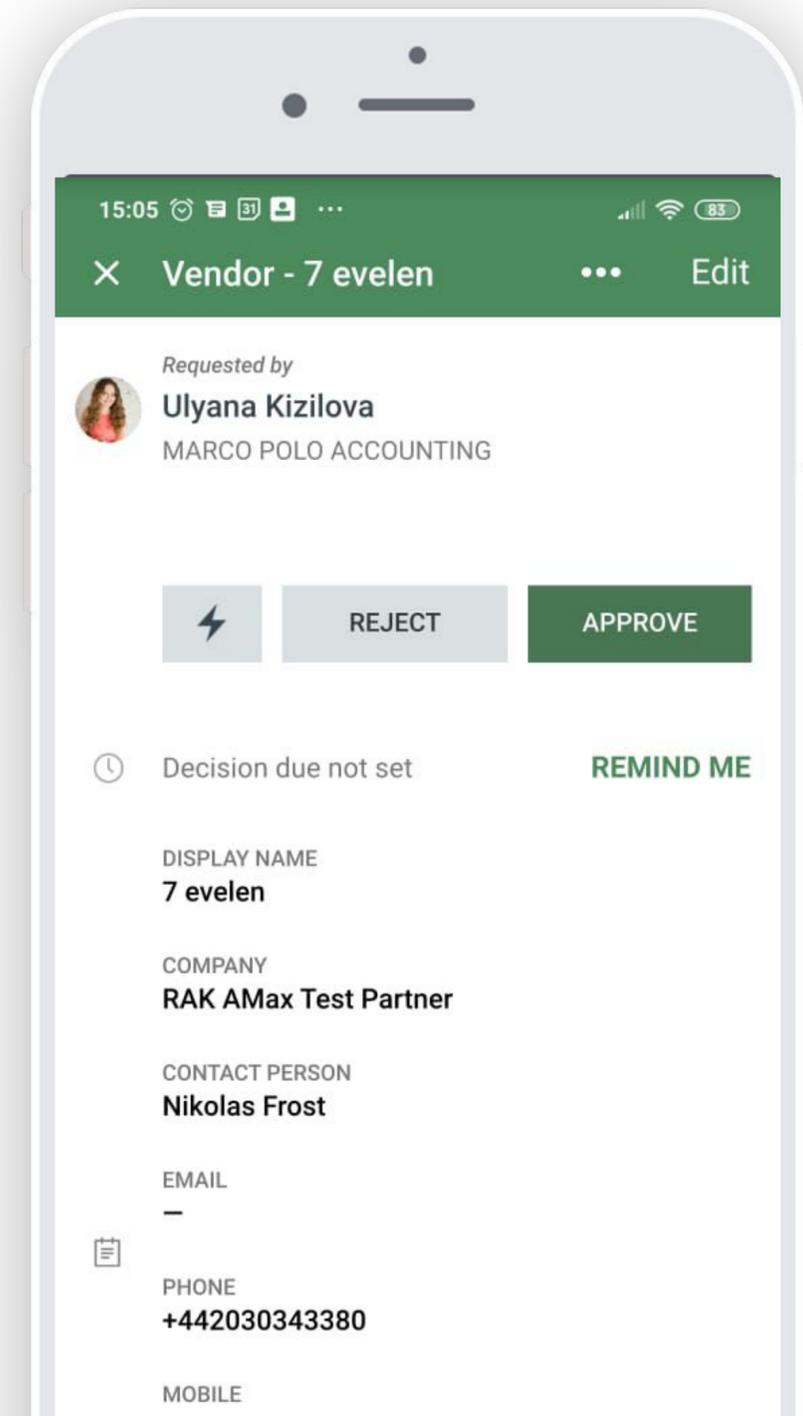
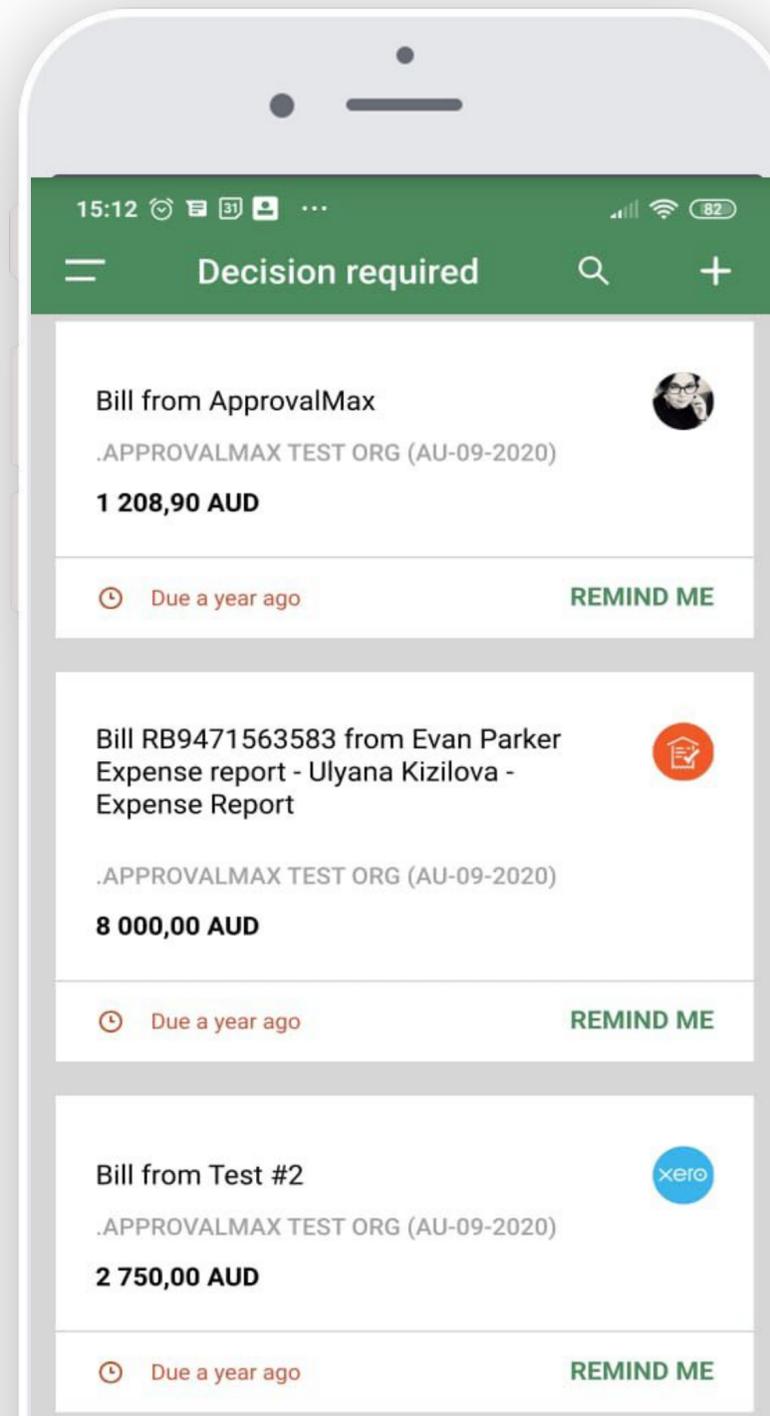


Work on the go

There are various options for approving requests without delay while on the go.

With the iOS or the Android app installed, you as an Approver will receive push notifications when a new approval request arrives.

Please note: on a tablet, it's best to use a mobile web browser instead of the mobile app.

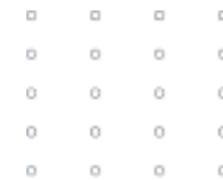


Collaborate with the Requester, Watchers and other Approvers

Comments can be left for other users who have access to the given request. Approvers will be instantly notified and they can either reply by email or leave another comment.

All actions and discussions are logged and saved as part of the audit trail report.

The screenshot displays a bill approval interface. At the top, a box shows '216.00 GBP' and the word 'Bill'. Below this, the bill details are: 'Bill 20162212 from Accessories for Marketing' and 'WOOD HARVEST LTD.'. There are two buttons: 'REJECT' (grey) and 'APPROVE' (green). A comment thread follows, starting with a user profile picture and the text 'Please make a decision'. Below the thread, a summary table shows 'TOTAL: 216.00 GBP'. The comment thread includes: a submission by Wolf Wunderlich at 5:25 PM; a question by Wolf Wunderlich at 7:27 PM: 'Why we need this? Is it company expense or your for private?'; a response by a woman at 7:28 PM: 'We are sponsor at the TIMBERSPORTS event and having BBQ. See <http://www.stihl.co.uk/next-event.aspx>'; a response by Willi Waldmeister at 7:29 PM: 'OK. Make a photo for our website when folks queueing up for sausages.'; and a final response by the woman at 7:30 PM: 'No sausages - we will have German bratwurst.'. At the bottom, there is a 'Leave comment' input field and a play button icon.



If you have questions, please refer to our **Knowledge Base** or fill in the **form**.

For support questions, please [contact us](#).