ApprovalMax

September 2023

Approver Guide for NetSuite

Cloud Approval Workflows for Finance and Accounting

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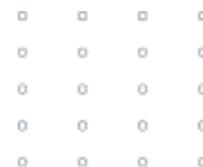
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Accept an invitation

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

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

Accept an invitation

If you get multiple invitations, choose for which Organisations you want to accept the invitation.
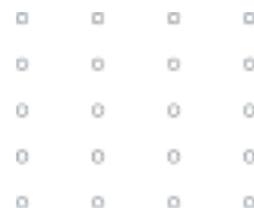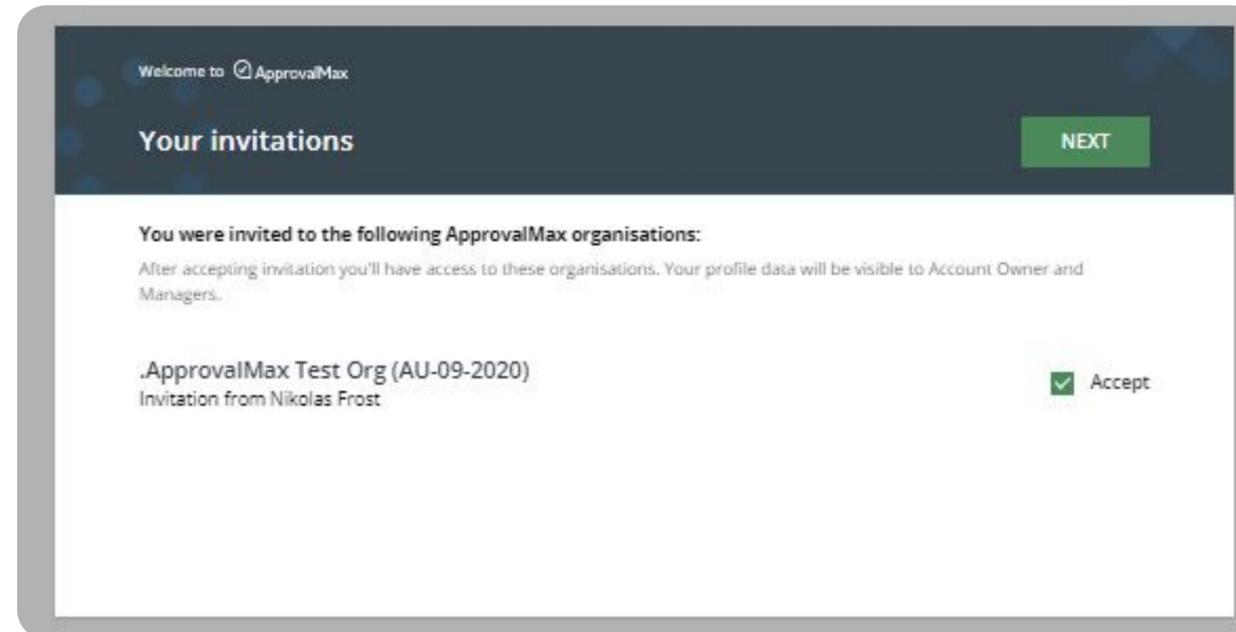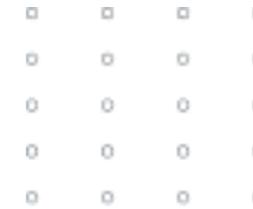
# Change your name, contact details or the notification and security settings

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.**
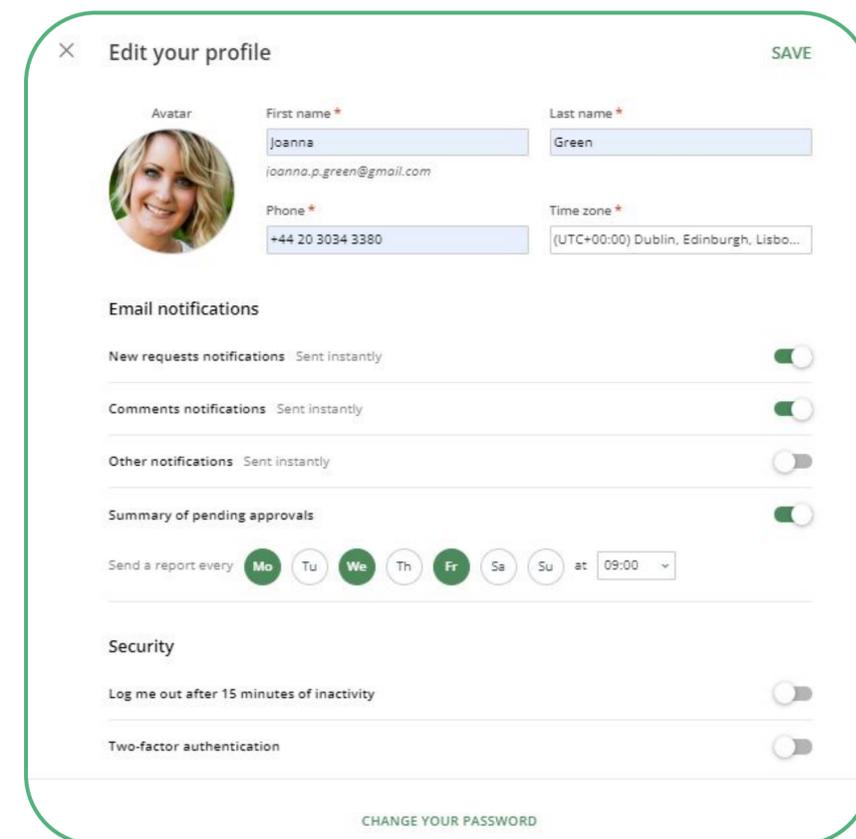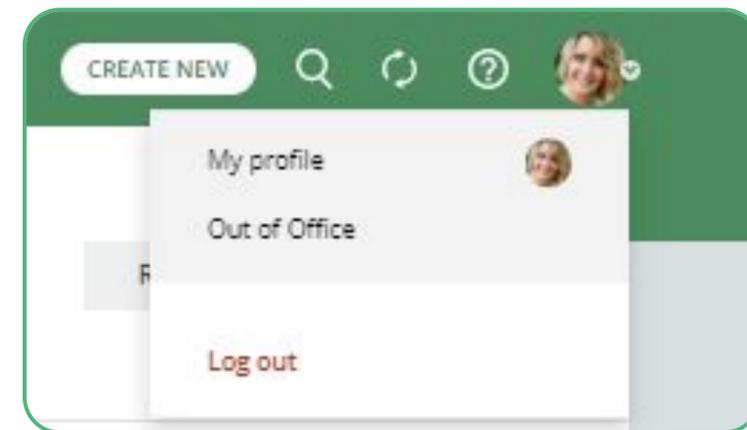
Reset your password

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.
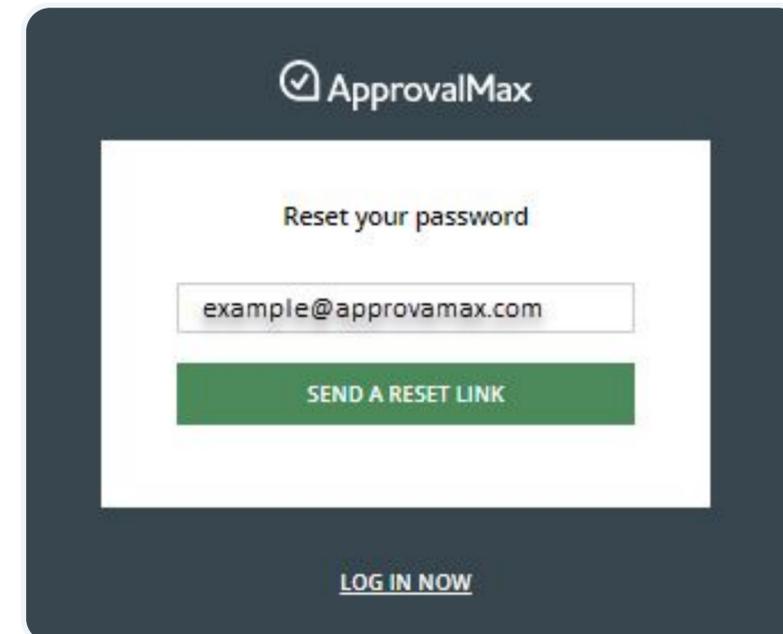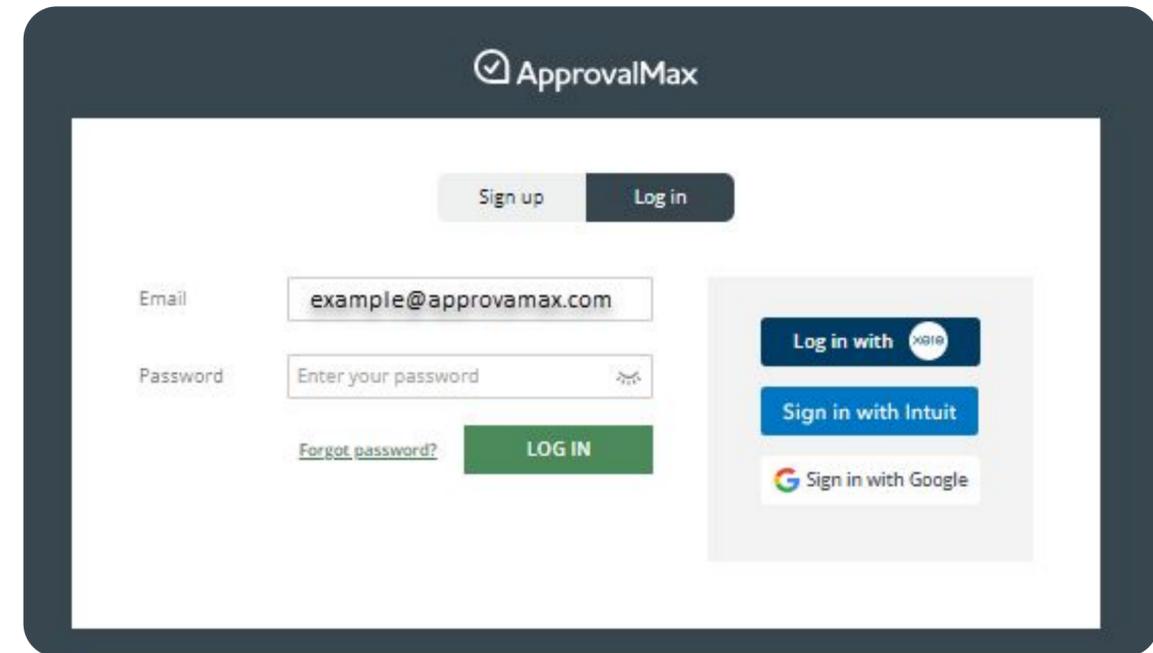
Enable Two-Factor Authorisation

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

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.
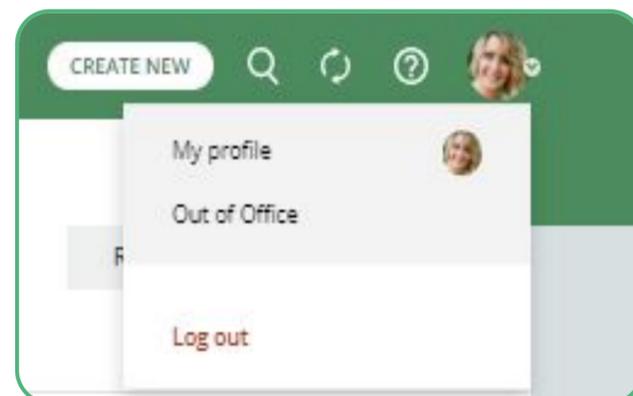

Please note: a Delegate won't see requests previously approved by the original Approver.

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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
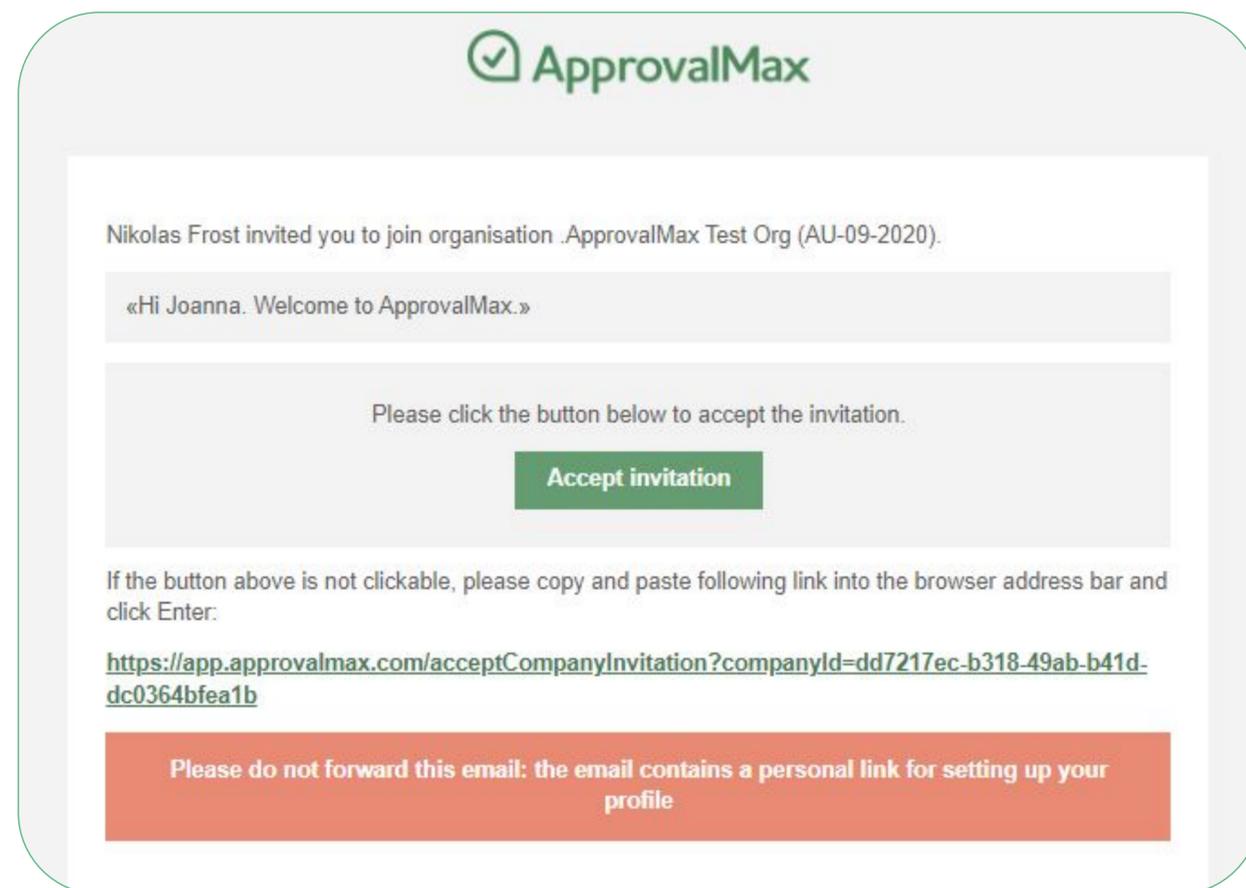

... and log in with your personal credentials.
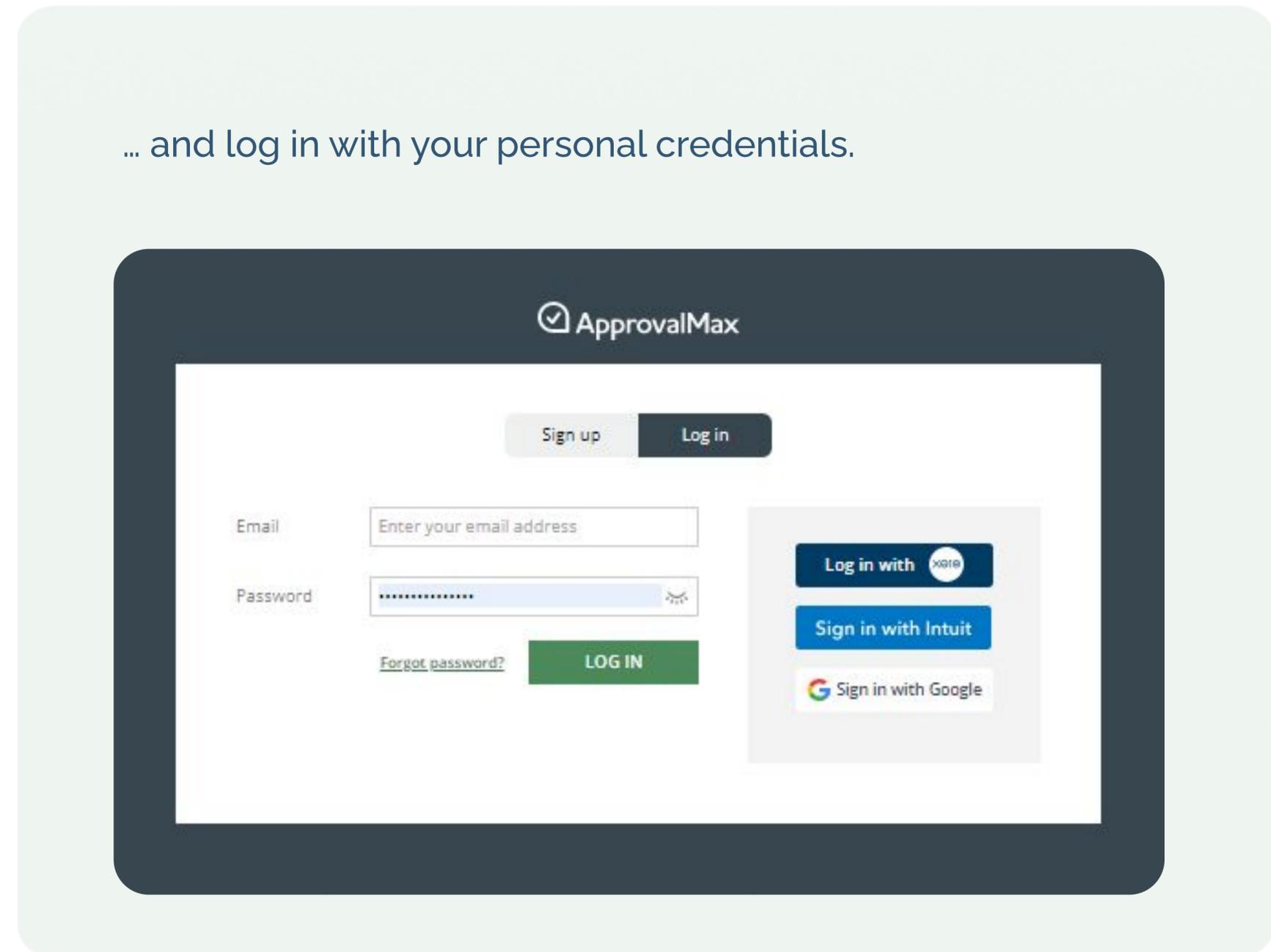
# Accept an invitation to an additional Organisation 1.2

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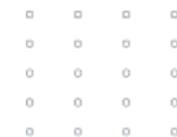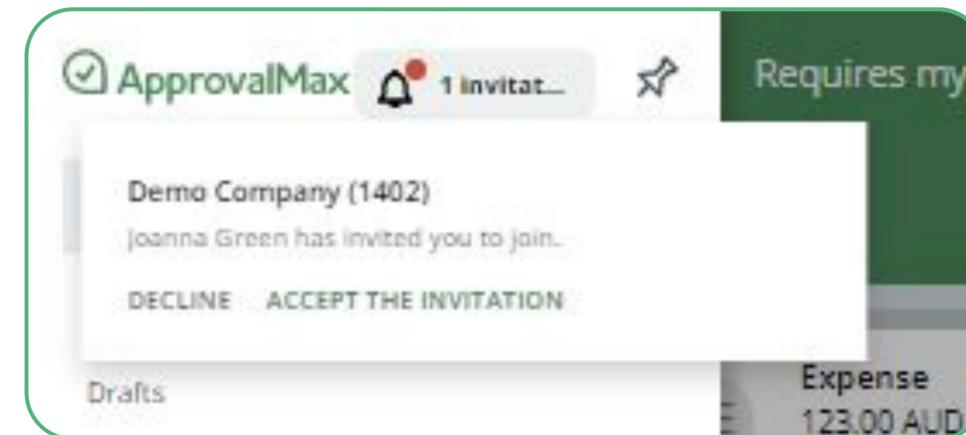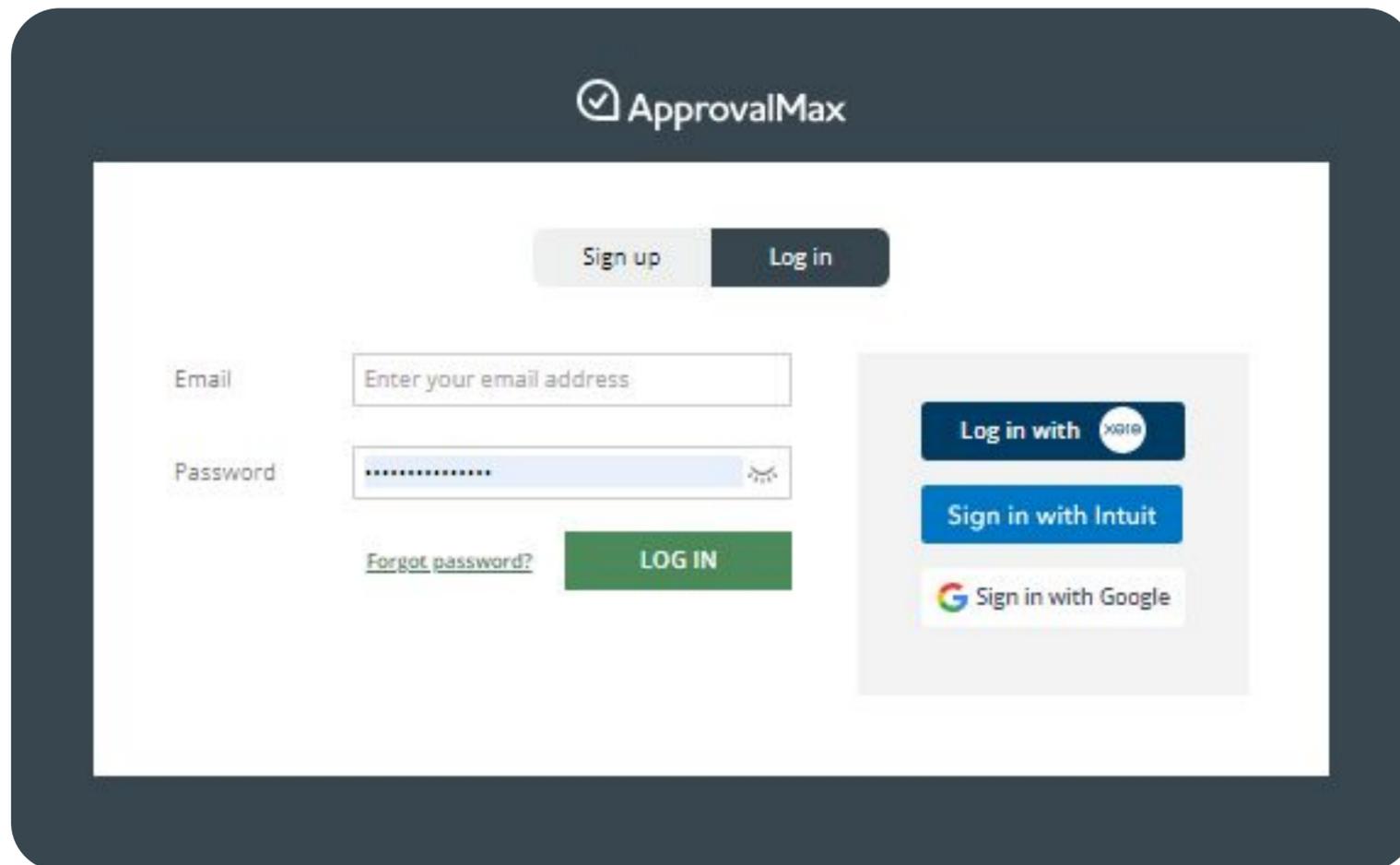
Approval request lists

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).
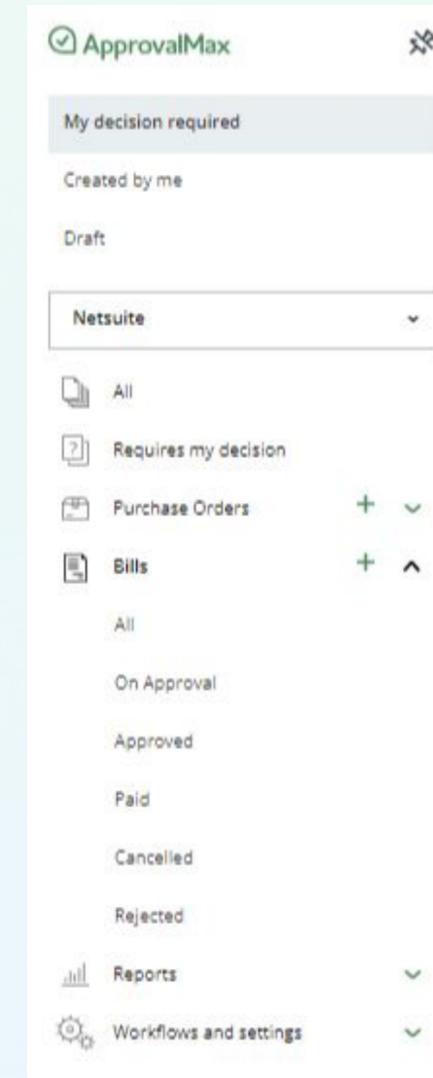
Approval request view

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.

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.

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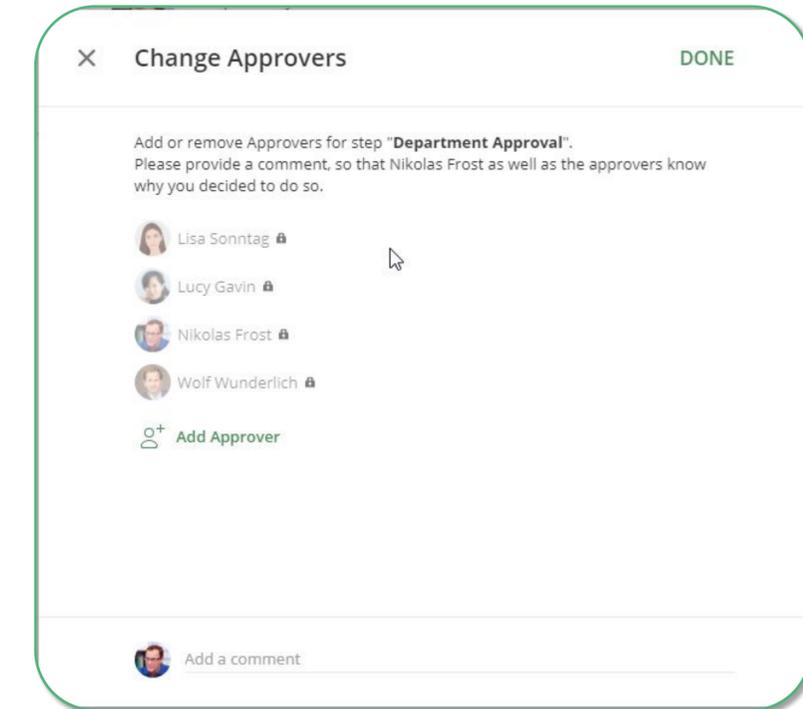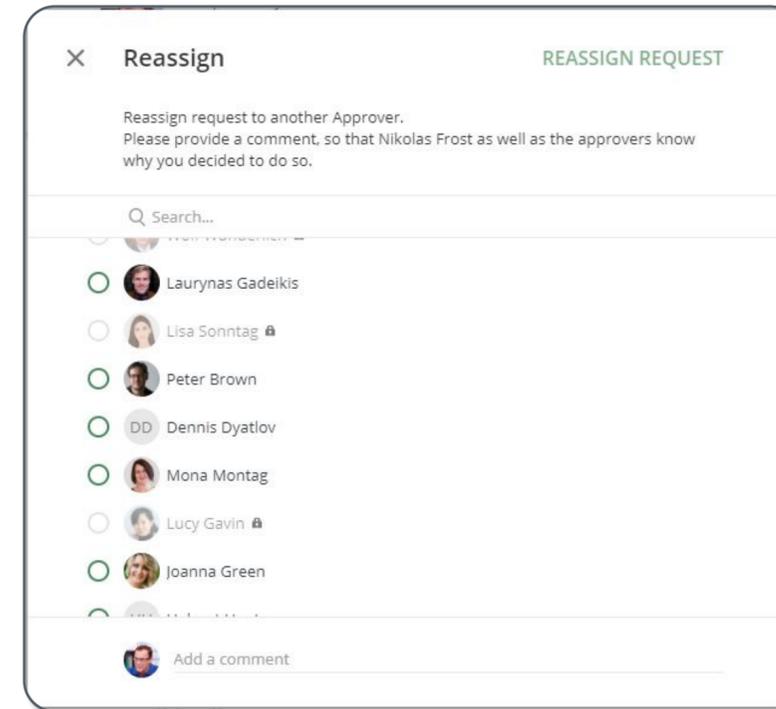
Please note: you can only add another Approver if the workflow step has the "All" approval condition. If the "Any of" approval condition has been selected for it, the Change Approvers button is not available.
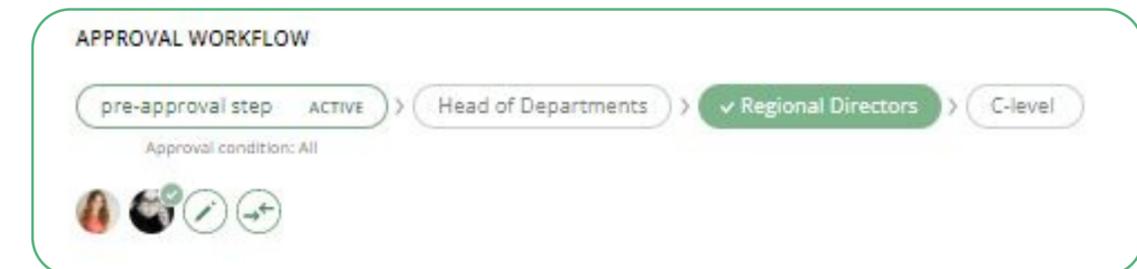
Add Watchers

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
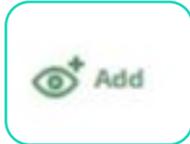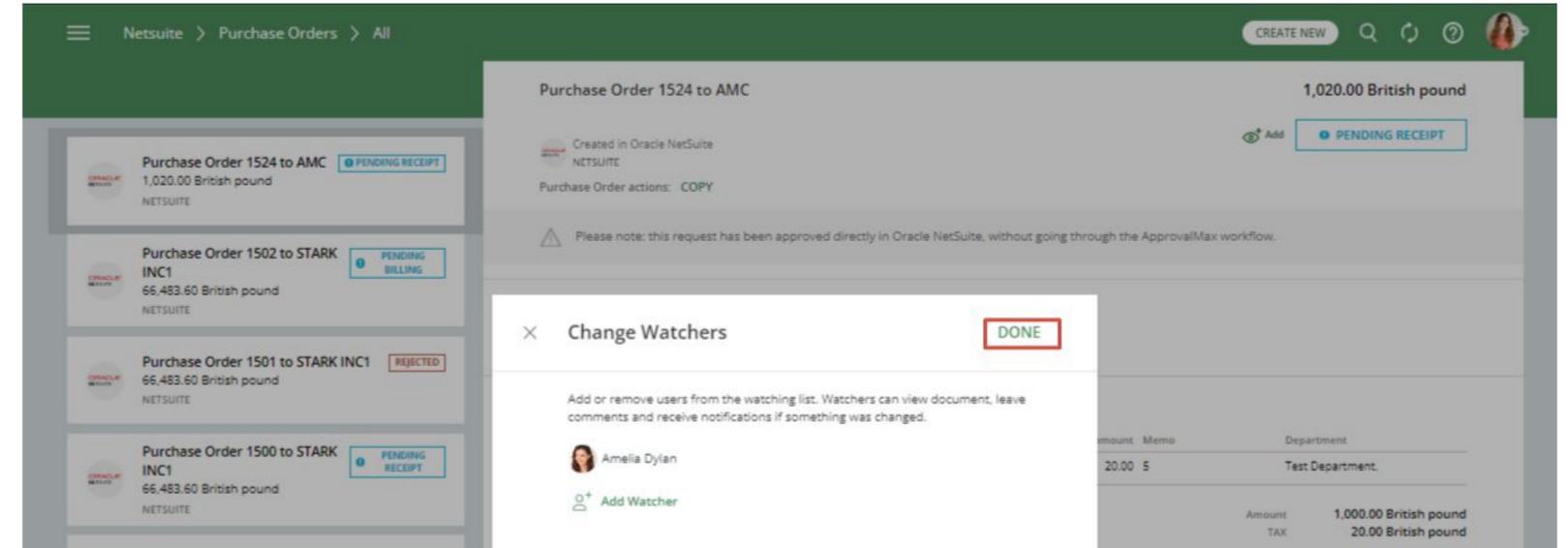
Work on the go

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.
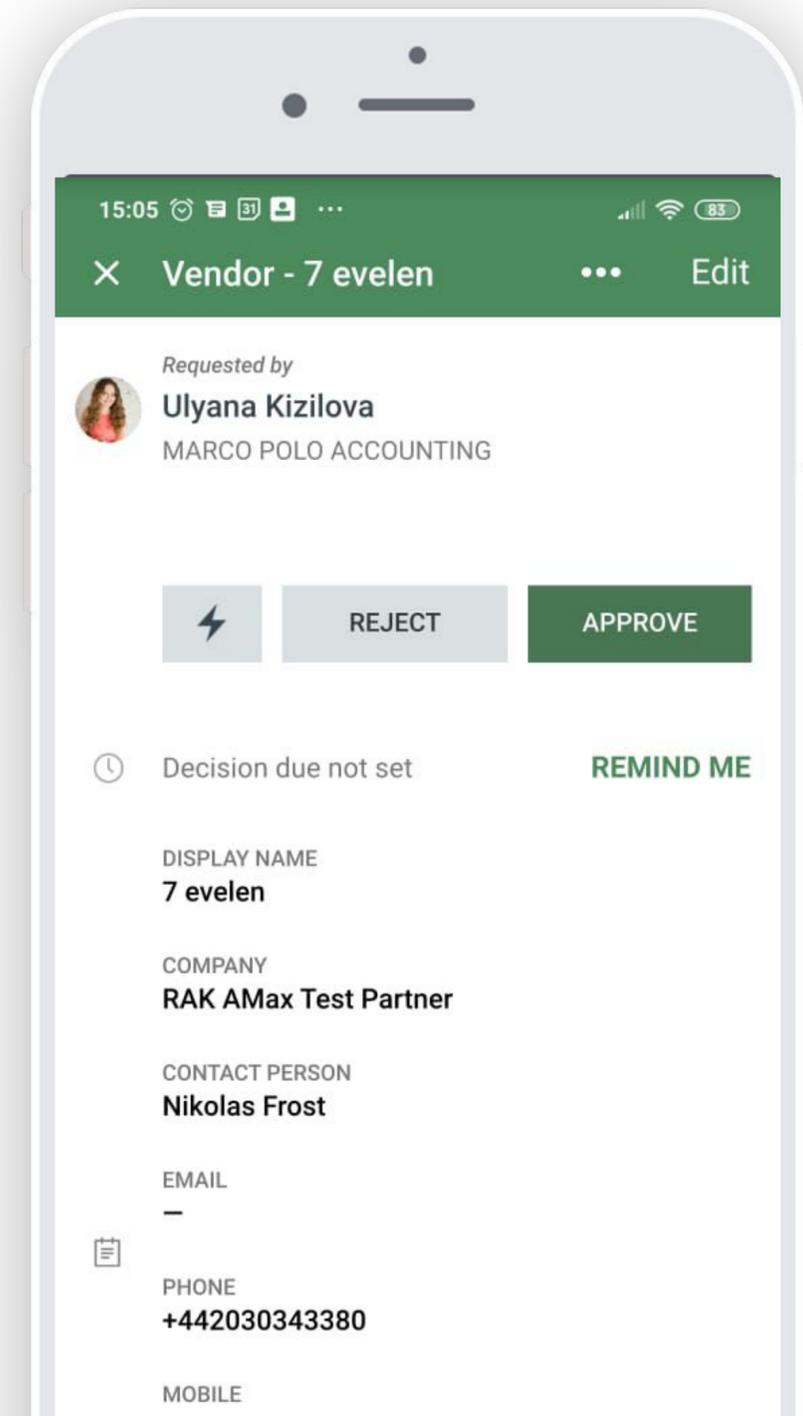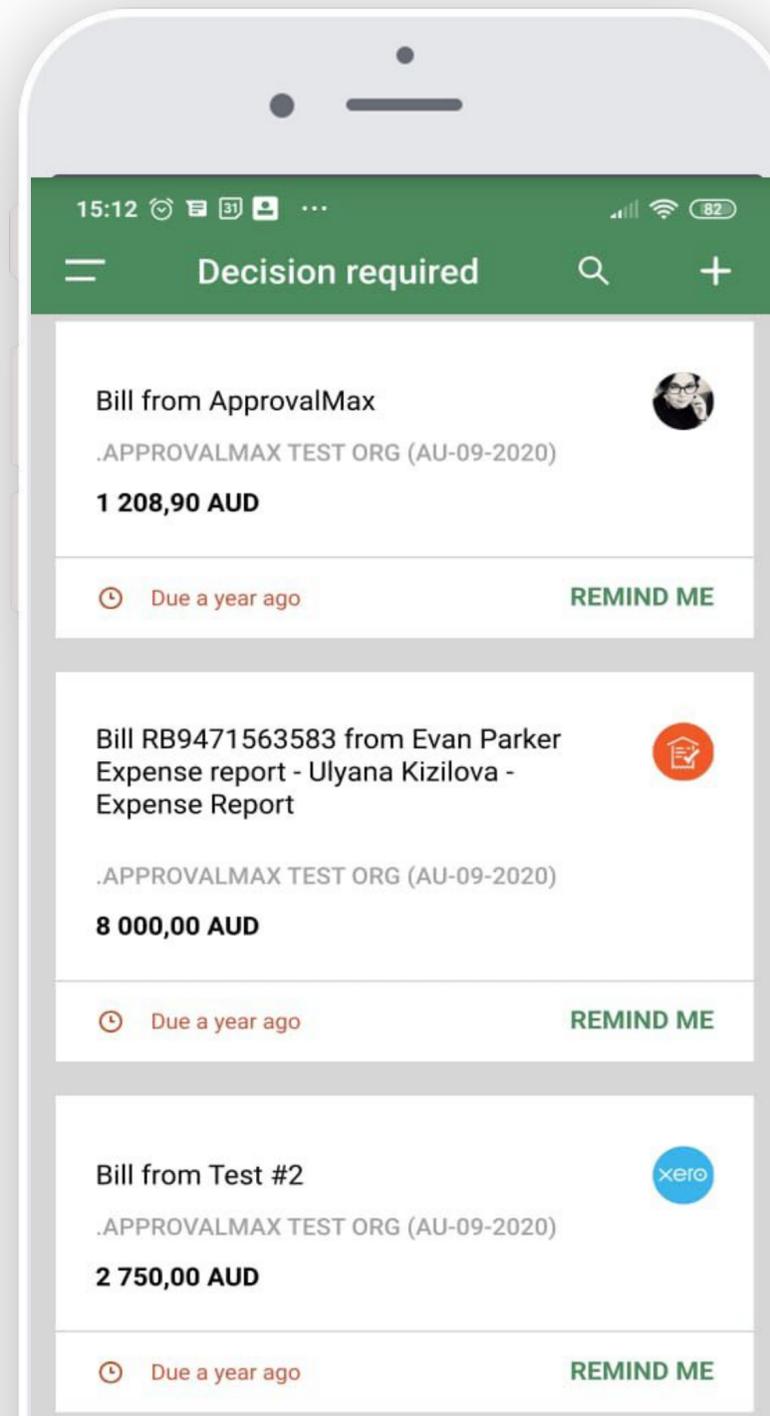
Collaborate with the Requester, Watchers and other Approvers

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.

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

For support questions, please contact us.