



September 2023

Approver Guide for NetSuite

Cloud Approval Workflows for Finance and Accounting

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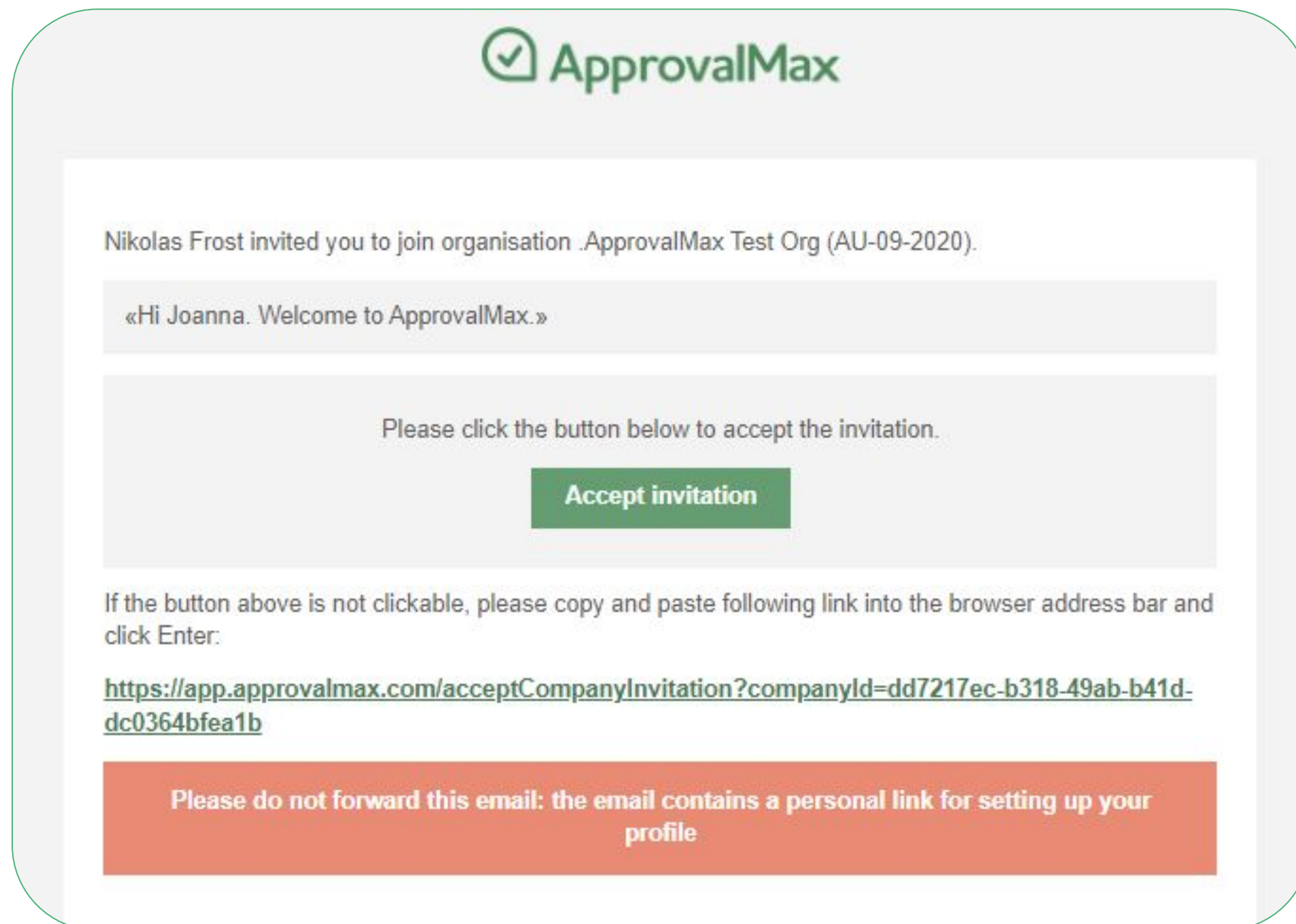
Working with ApprovalMax

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Accept an invitation

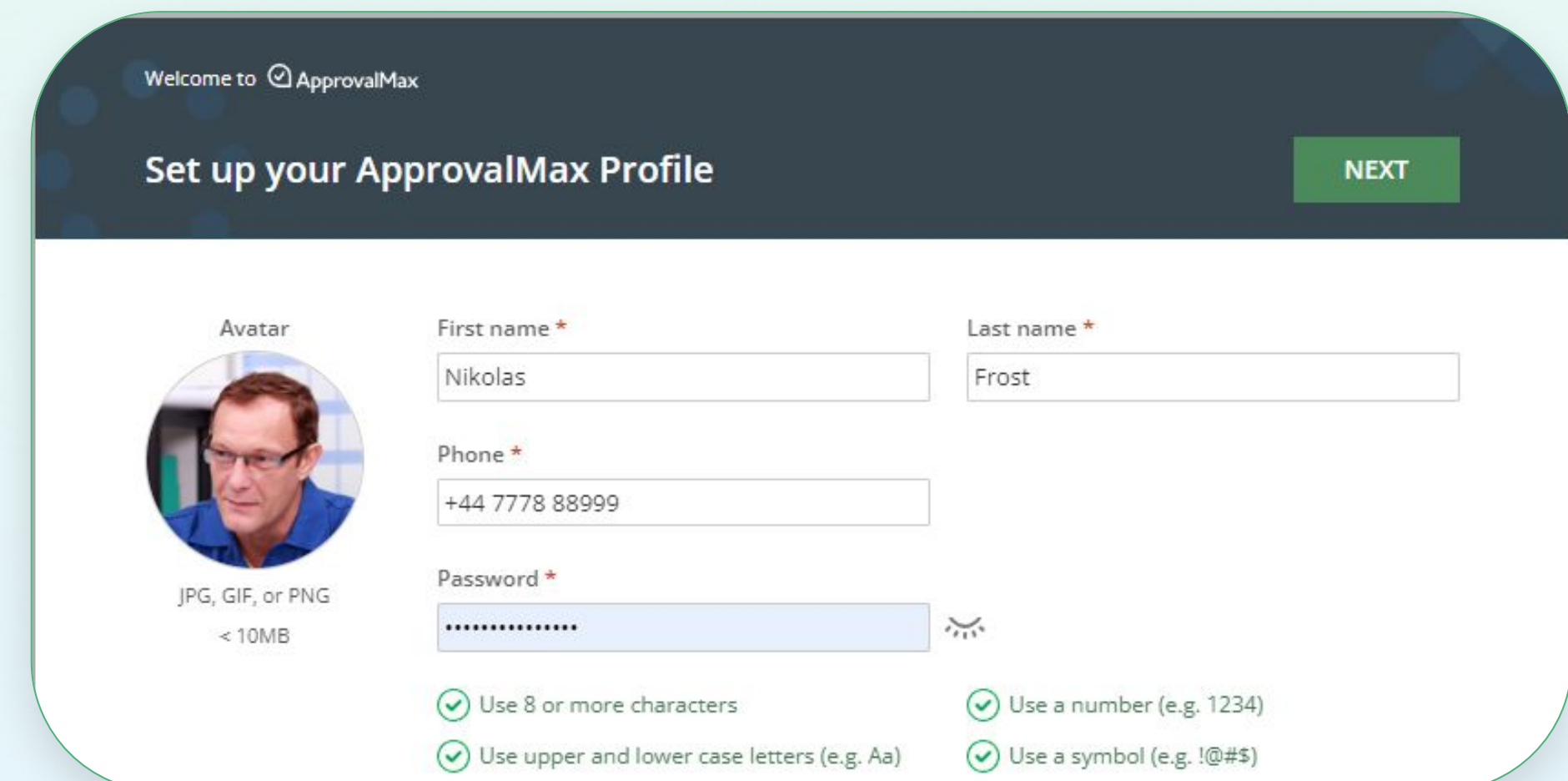
1

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 text: "Please click the button below to accept the invitation." and a green "Accept invitation" button. Below the button, it says: "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 box 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).

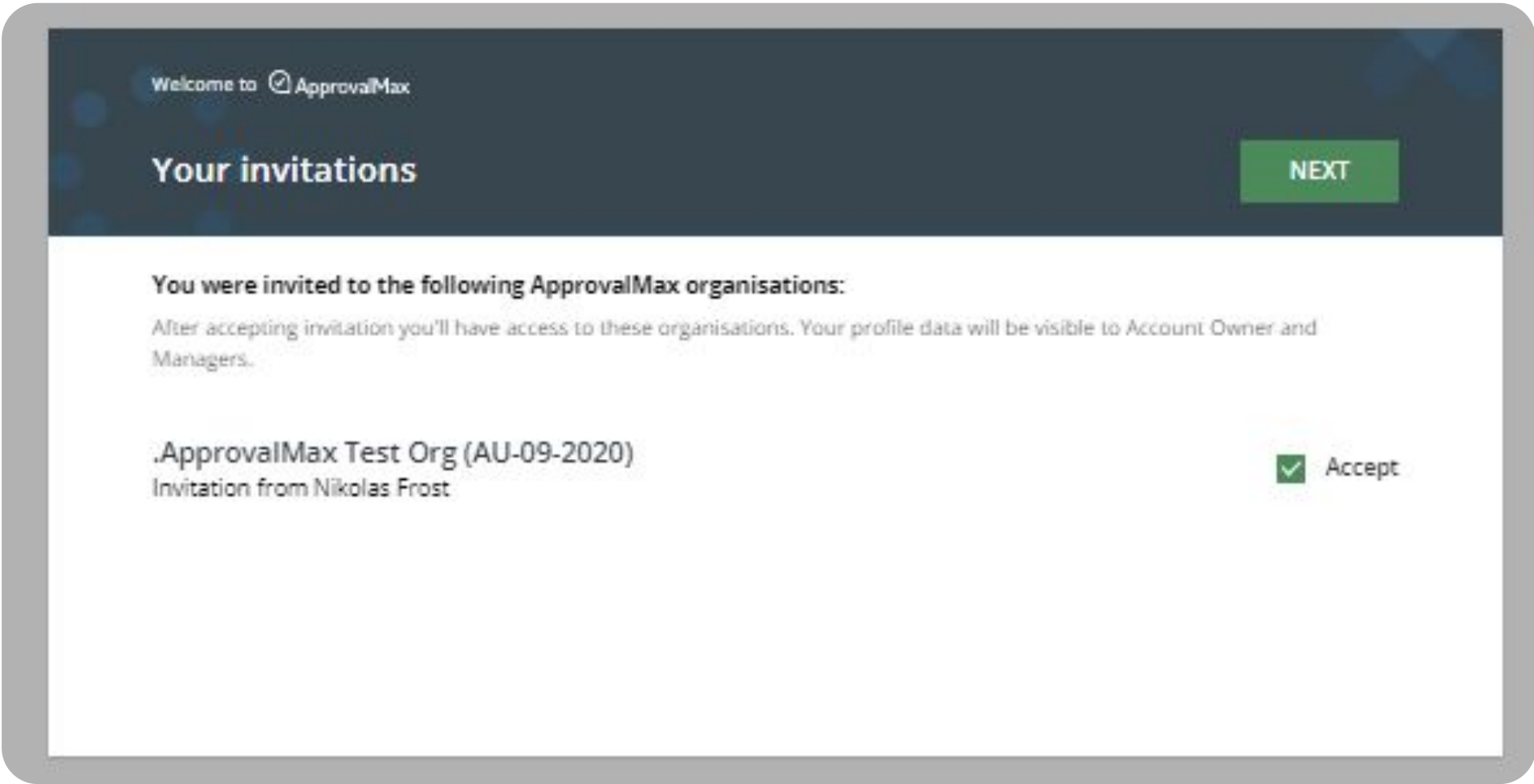


The screenshot shows the "Set up your ApprovalMax Profile" form. At the top, it says "Welcome to ApprovalMax" and "Set up your ApprovalMax Profile" with a green "NEXT" button. The form includes an "Avatar" section with a circular photo of a man and the text "JPG, GIF, or PNG < 10MB". To the right are 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 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

2

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

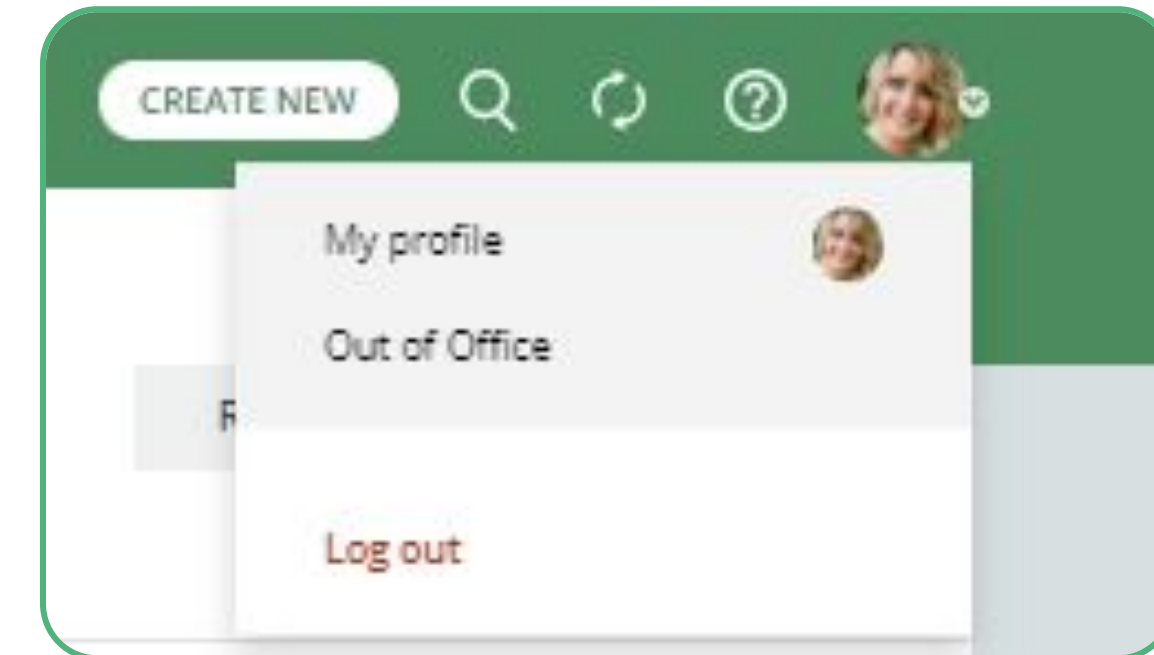
Users can change their name, password and time zone, upload an avatar or add a phone number any time.

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.

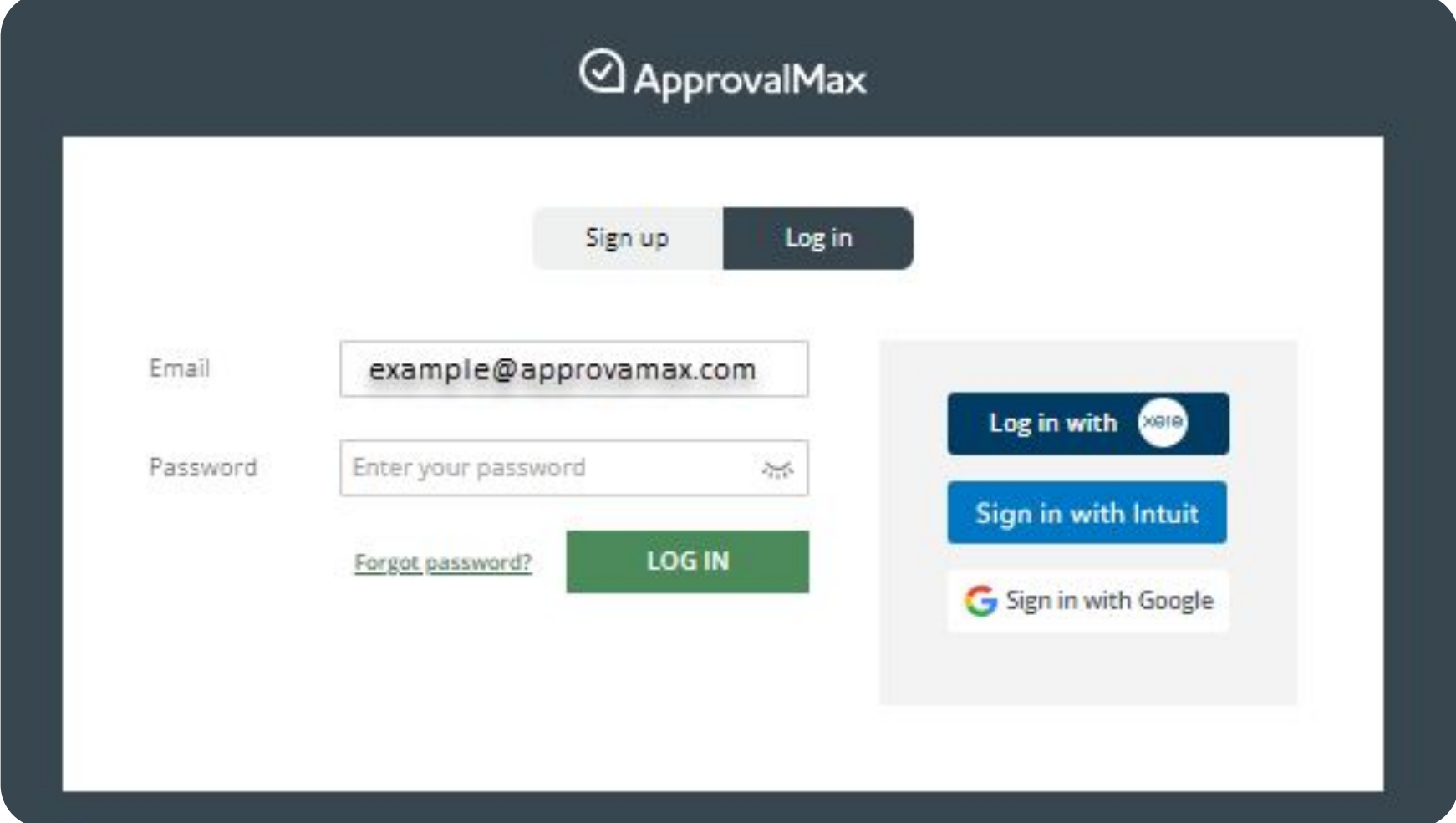
A screenshot of a web form titled 'Edit your profile' with a 'SAVE' button in the top right corner. The form contains several input fields: 'Avatar' (with a circular profile picture), 'First name' (filled with 'Joanna'), 'Last name' (filled with 'Green'), 'Email' (filled with 'joanna.p.green@gmail.com'), 'Phone' (filled with '+44 20 3034 3380'), and 'Time zone' (a dropdown menu showing '(UTC+00:00) Dublin, Edinburgh, Lisbo...'). Below these fields are sections for 'Email notifications' and 'Security'. The 'Email notifications' section has four rows, each with a label, a 'Sent instantly' status, and a toggle switch: 'New requests notifications' (toggle on), 'Comments notifications' (toggle on), 'Other notifications' (toggle off), and 'Summary of pending approvals' (toggle on). Below these is a 'Send a report every' section with radio buttons for days of the week (Mo, Tu, We, Th, Fr, Sa, Su) and a time dropdown set to '09:00'. The 'Security' section has two rows with toggle switches: 'Log me out after 15 minutes of inactivity' (toggle off) and 'Two-factor authentication' (toggle off). At the bottom of the form is a link that says 'CHANGE YOUR PASSWORD'.

Reset your password

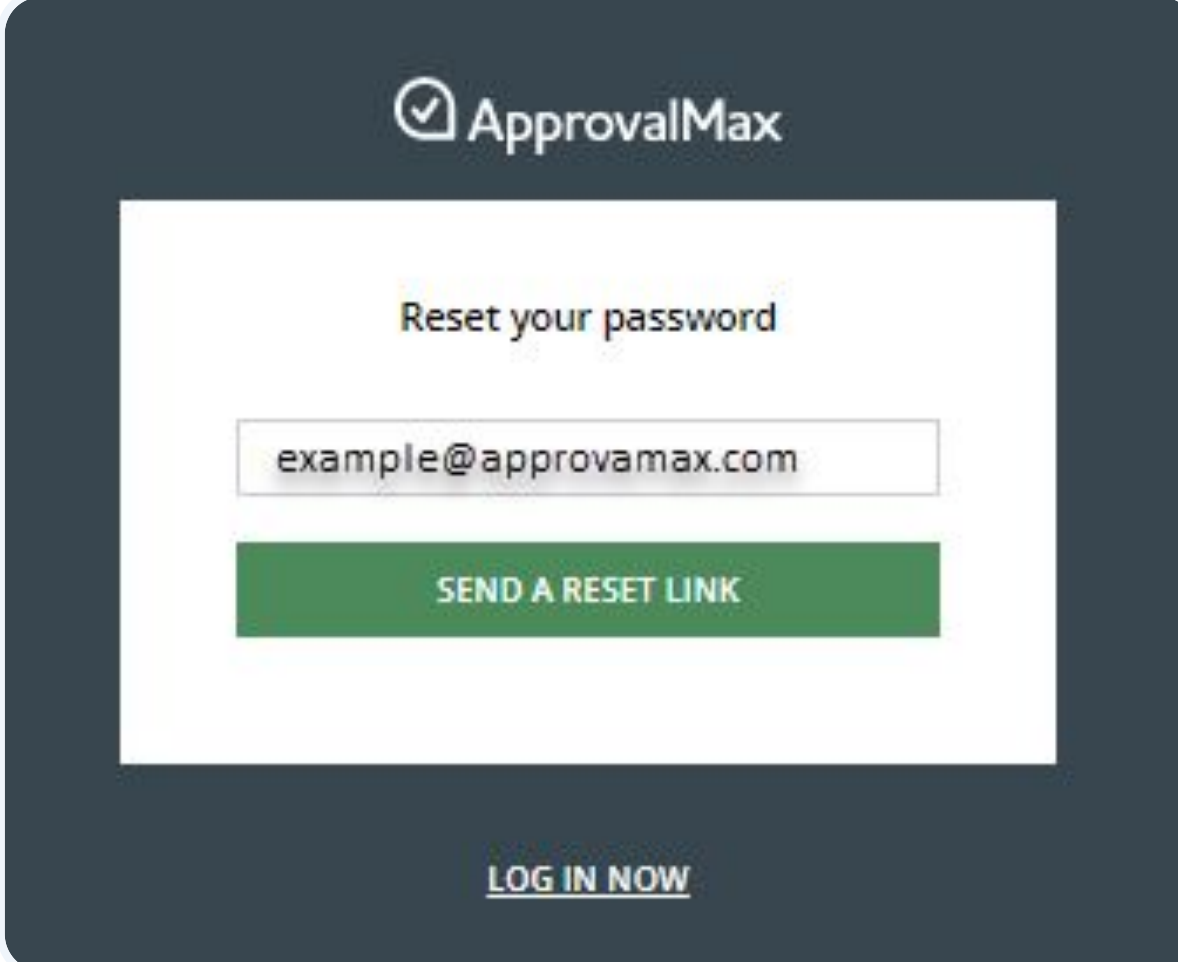
Resetting a forgotten password is easy in ApprovalMax.

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.




The screenshot shows the ApprovalMax login interface. At the top is the ApprovalMax logo. Below it are two buttons: 'Sign up' and 'Log in'. The 'Log in' button is active. Below these are input fields for 'Email' (containing 'example@approvamax.com') and 'Password' (with a placeholder 'Enter your password' and a toggle icon). A green 'LOG IN' button is positioned below the password field. To the right of the input fields is a sidebar with three options: 'Log in with Xero', 'Sign in with Intuit', and 'Sign in with Google'. A link for 'Forgot password?' is located below the password field.




The screenshot shows the ApprovalMax password reset page. At the top is the ApprovalMax logo. Below it is the heading 'Reset your password'. There is an input field for 'Email' containing 'example@approvamax.com'. Below the input field is a green button labeled 'SEND A RESET LINK'. At the bottom of the page is a link that says 'LOG IN NOW'.

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



First name *

Ulyana

Last name *

Kizilova

Phone *

+44 20 3034 3380

Time zone *

(UTC+00:00) Dublin, Edinburgh, Lisbo...

Email notifications

New requests notifications Sent instantly

☒

Comments notifications Sent instantly

☒

Other notifications Sent instantly

☒

Summary of pending approvals

☒

Send a report every

Mo

Tu

We

Th

Fr

Sa

Su

at 10:00

Security

Log me out after 15 minutes of inactivity

☐

Two-factor authentication

☒

✕ 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

667442

CONTINUE

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.

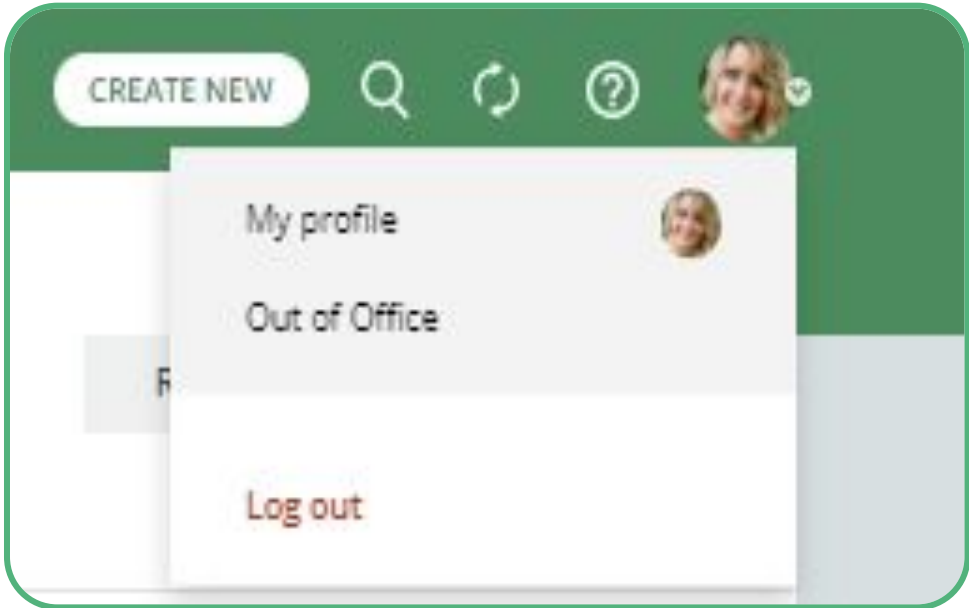
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Out of Office

SAVE

Specify the Delegate who will be approving requests on your behalf.

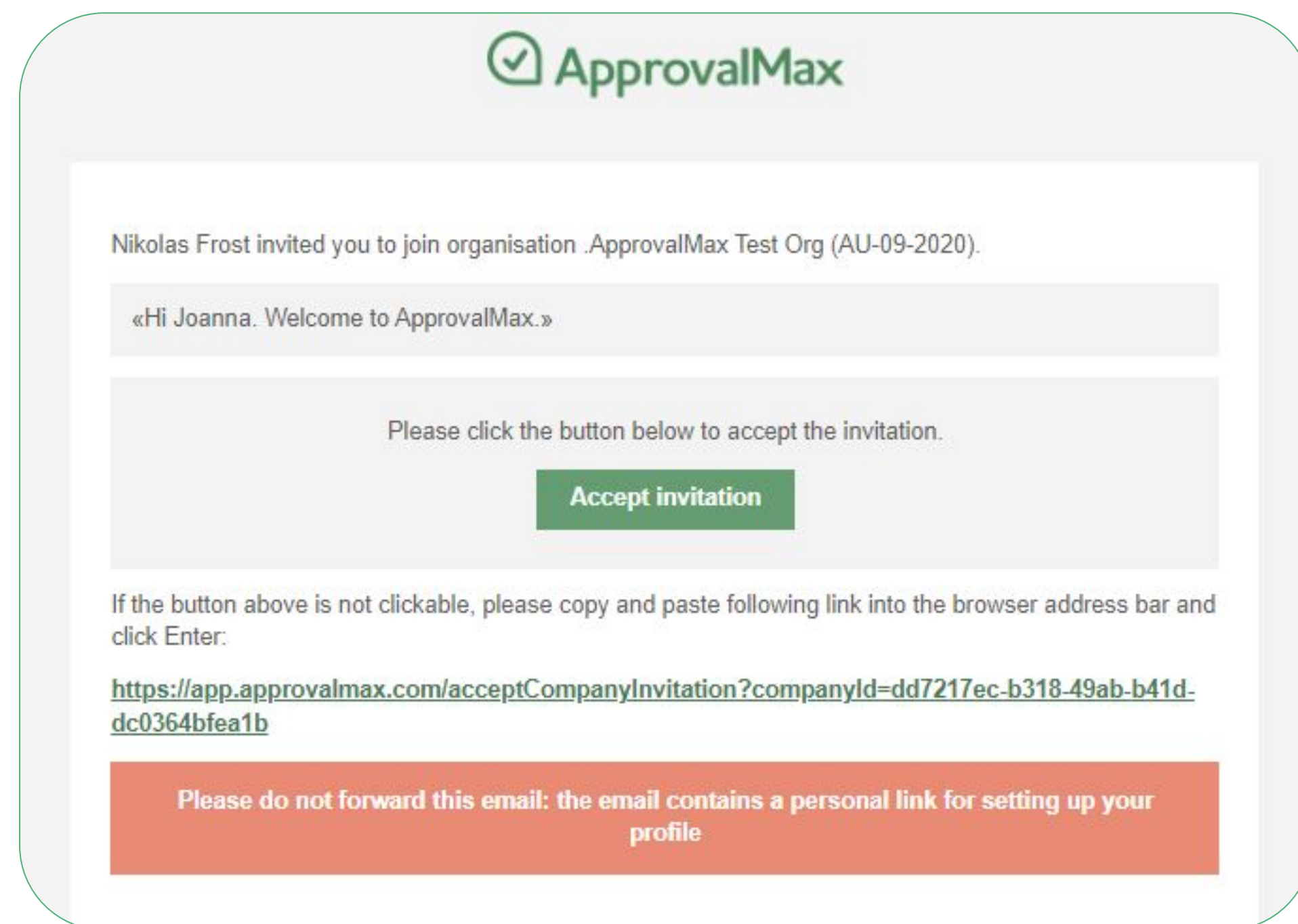
ORGANISATION	DELEGATE	START DATE	END DATE
ApprovalMax Test Org (AU-09-2020)	 Beverly Wheeler	24 Nov 2022	30 Nov 2022
Netsuite	 Select a Delegate	Start date	End date
QuickBooks Online with Dext	 Joanna Green	24 Nov 2022	30 Nov 2022
Standalone Organisation	 Select a Delegate	Start date	End date
Xero	 Select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



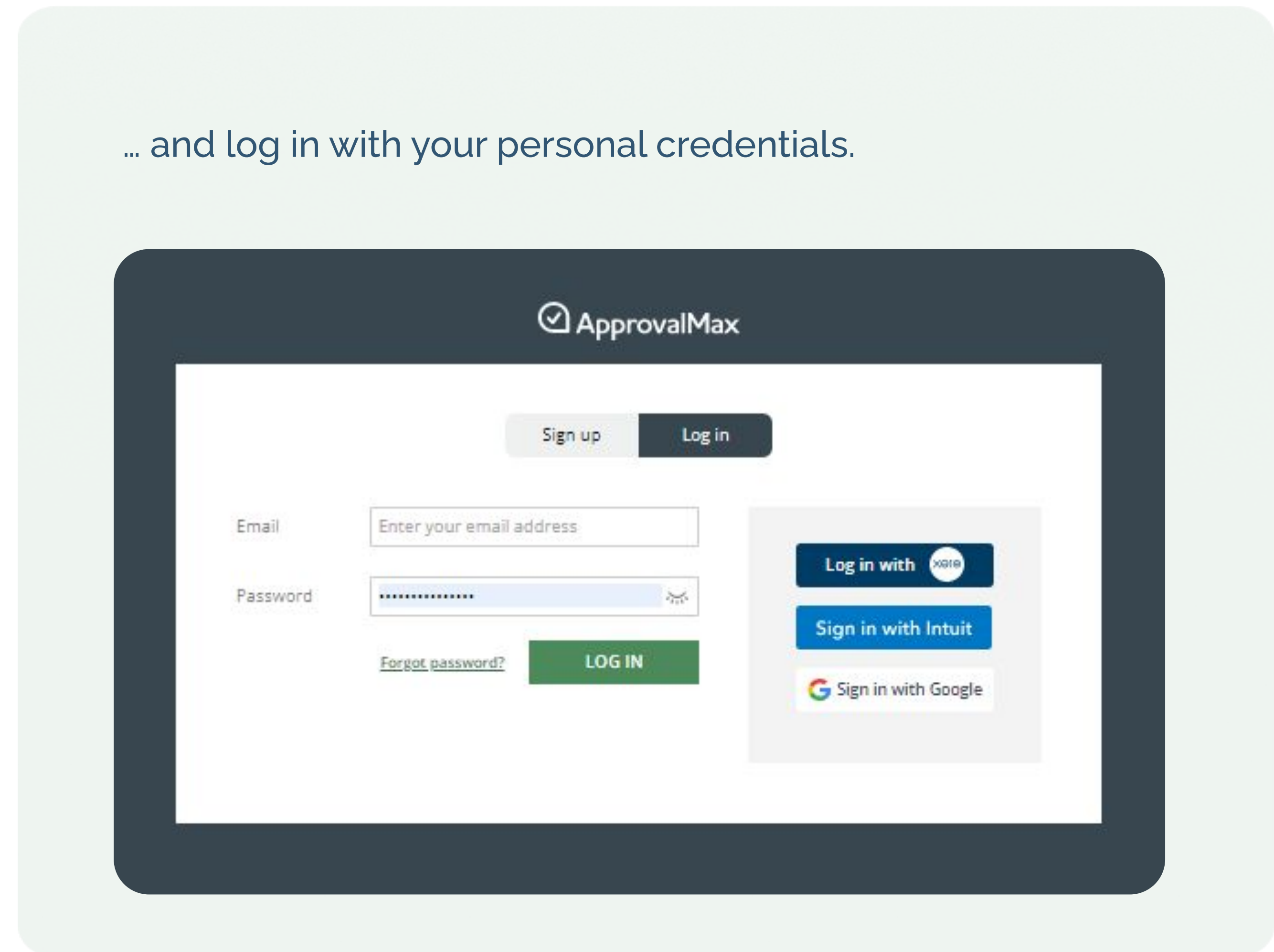
Please note: a Delegate won't see requests previously approved by the original Approver.

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

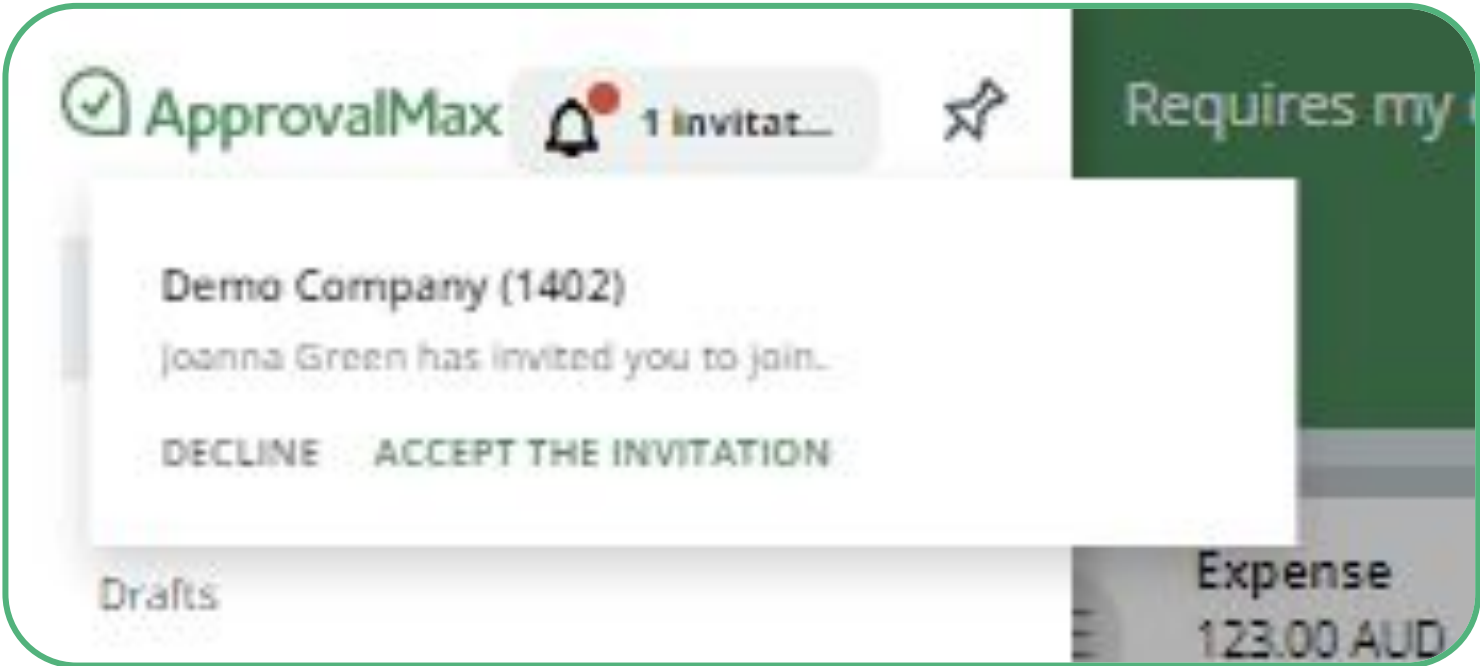
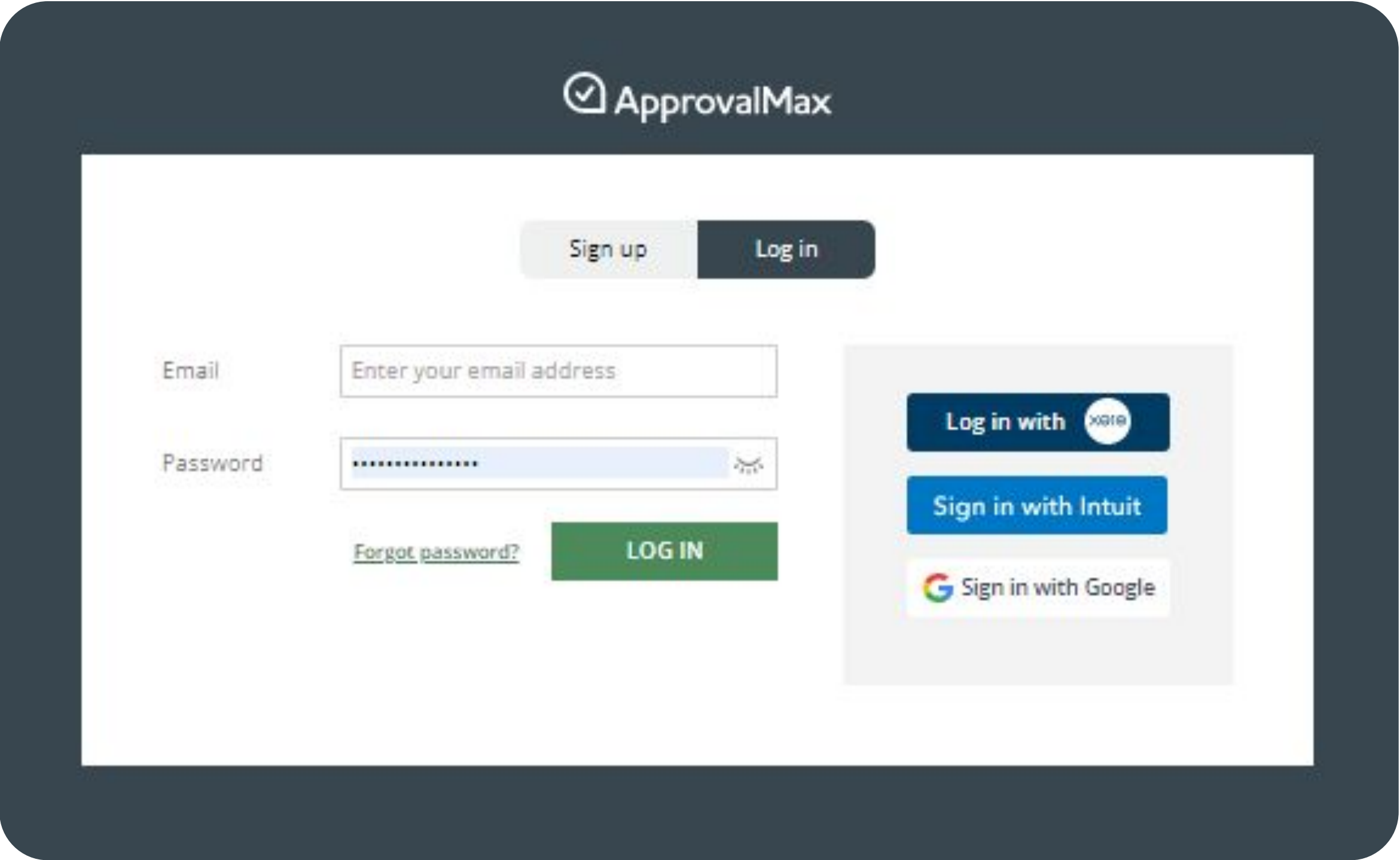


... and log in with your personal credentials.



Accept an invitation to an additional Organisation 1.2

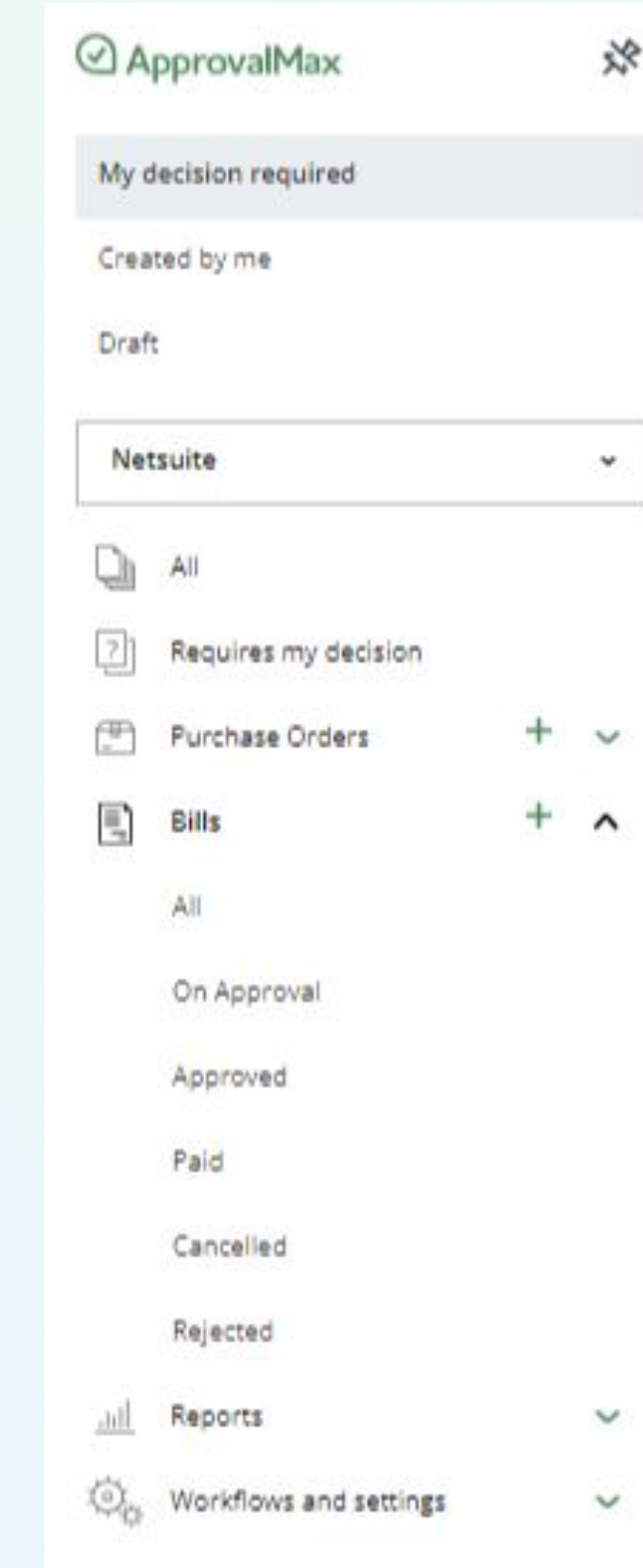
Or, you can log into your account and accept the invitations directly in ApprovalMax, you'll find them in the menu on the left.



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 a menu icon, the text 'Netsuite > Decision required', and a 'CREATE NEW' button. The main content area is divided into a left sidebar and a right main panel.

Left Sidebar: A list of recent transactions, each with a user profile icon, a description, and a value in British pounds. The items are: 'Vendor Bill from (7-11) Company' (1,069,998.93), 'Purchase Order to (7-11) Company' (10,699,998.93), 'Vendor Bill from (7-11) Company' (1,069,998.93), 'Purchase Order to STARK INC' (69.55), 'Purchase Order to (7-11) Company' (10,699,998.93), 'Vendor Bill from (7-11) Company' (1,069,998.93), 'Purchase Order to STARK INC' (8,994.00), and 'Purchase Order to (7-11) Company' (59.92).

Main Panel: Displays details for the selected 'Purchase Order to STARK INC' (8,994.00 British pound). It includes a 'REJECT' button and an 'APPROVE' button. Below this, it shows 'Transaction Number: 853', 'Vendor: STARK INC', and 'Date: 17 Apr 2023'. The 'ITEMS' section contains a table with one item: '109F Solid Women's Tunic' (1.00 units, 8,994.00 rate, 8,994.00 amount). The 'APPROVAL WORKFLOW' section shows 'Approval step' as 'ACTIVE' and 'Approval condition: All'. The 'AUDIT TRAIL' section shows a log entry: 'Pulled the request from Oracle NetSuite' (18 Apr 2023 09:35). At the bottom, there is a 'Leave a comment' text box.

Item	QTY	Units	Description	Rate	Amount	Tax code	Tax rate	Tax amount	Expected Receipt Date
109F Solid Women's Tunic	1.00	cs	Imported	8,994.00	8,994.00	VAT:UNDEF-CY	0.00	0.00	18 Apr 2023

Amount	8,994.00 British pound
TAX	0.00 British pound
TOTAL:	8,994.00 British pound

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

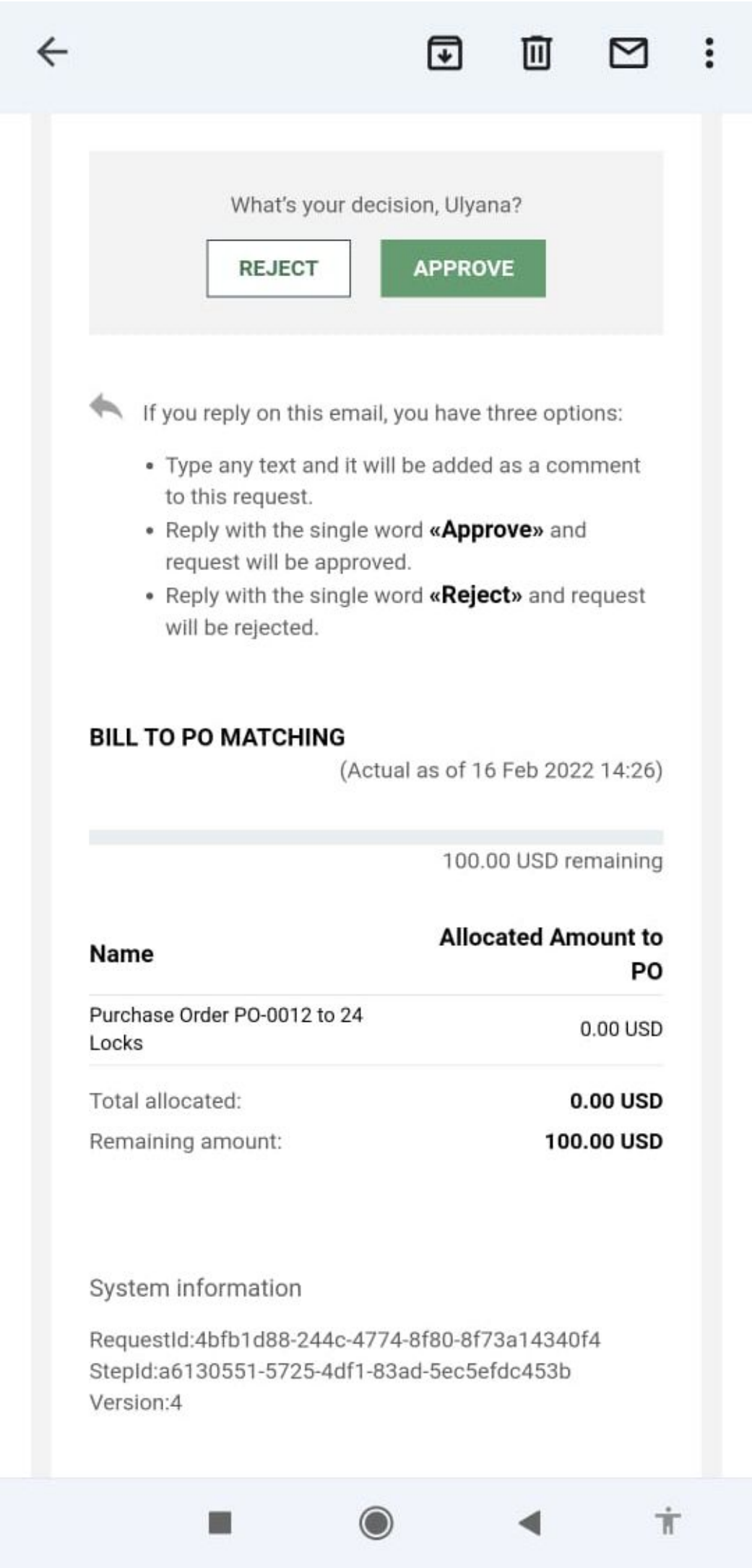
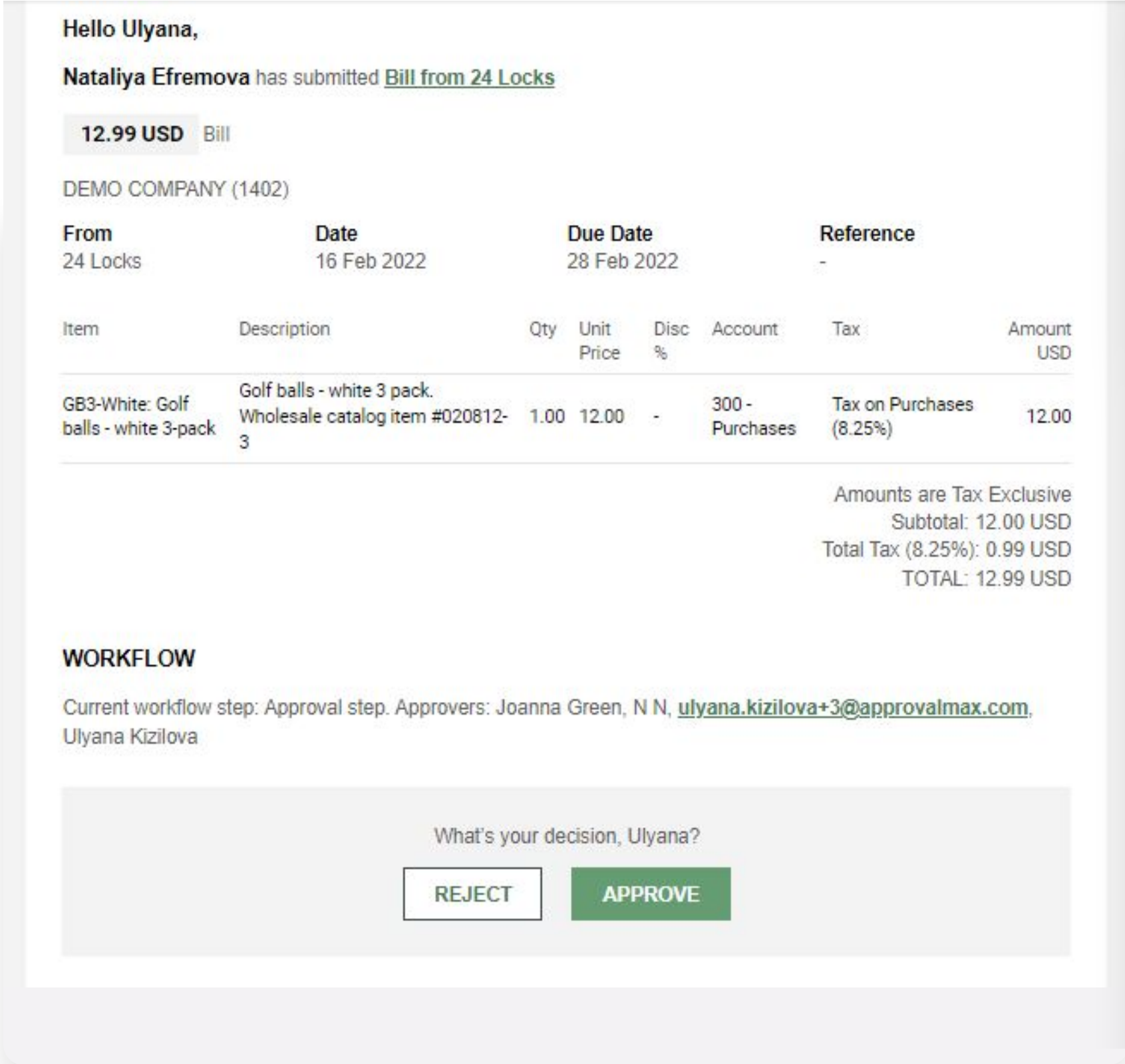
Approve/reject from an email notification

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.

×


Reassign

REASSIGN REQUEST

Reassign request to another Approver.
Please provide a comment, so that Nikolas Frost as well as the approvers know why you decided to do so.

Q Search...


Laurynas Gadeikis

Lisa Sonntag 


Peter Brown

DD Dennis Dyatlov

Mona Montag

Lucy Gavin 

Joanna Green



 Add a comment



×



Change Approvers



DONE


Add or remove Approvers for step "Department Approval".
Please provide a comment, so that Nikolas Frost as well as the approvers know why you decided to do so.


 Lisa Sonntag 

 Lucy Gavin 

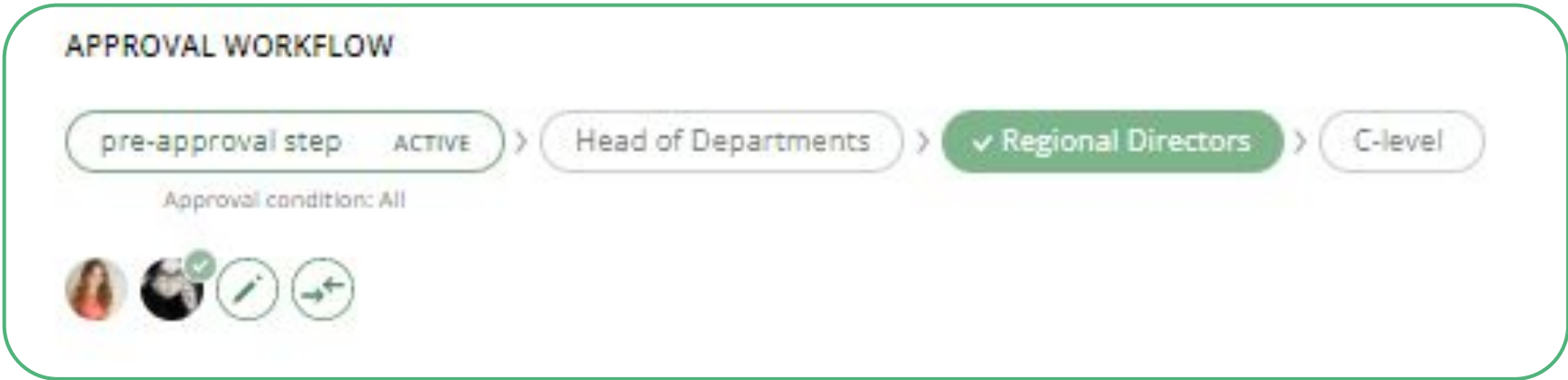
 Nikolas Frost 

 Wolf Wunderlich 

 Add Approver

 Add a comment

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.




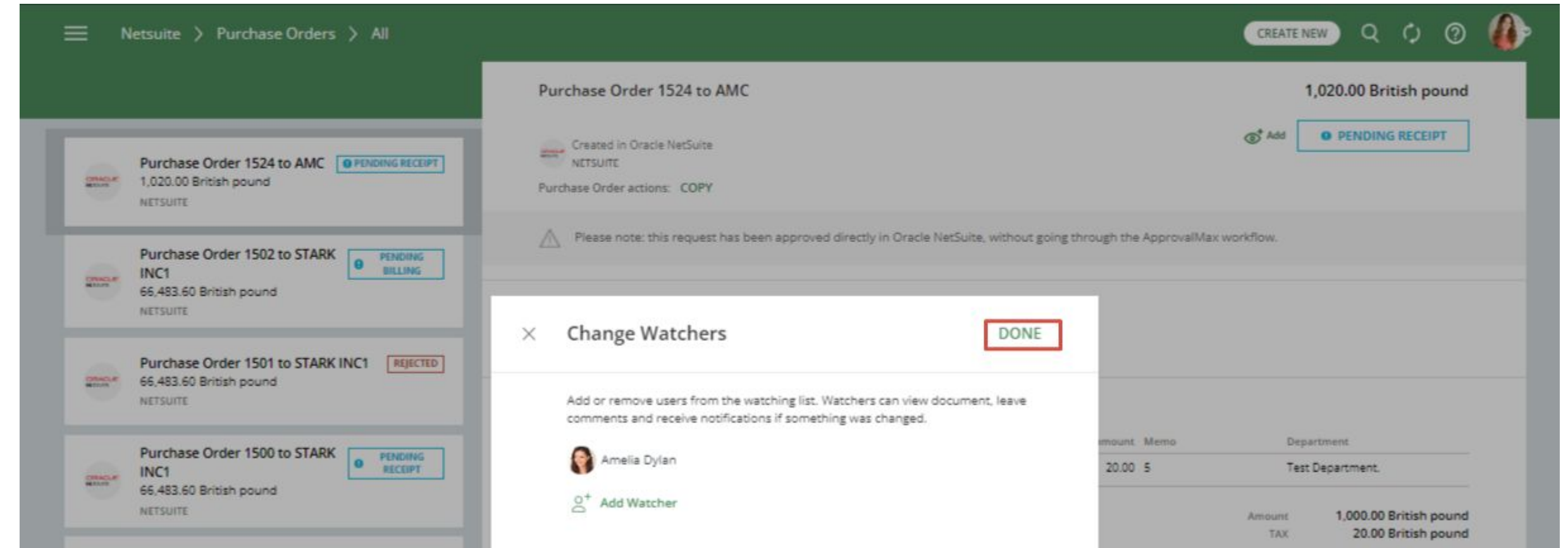
Add Watchers

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

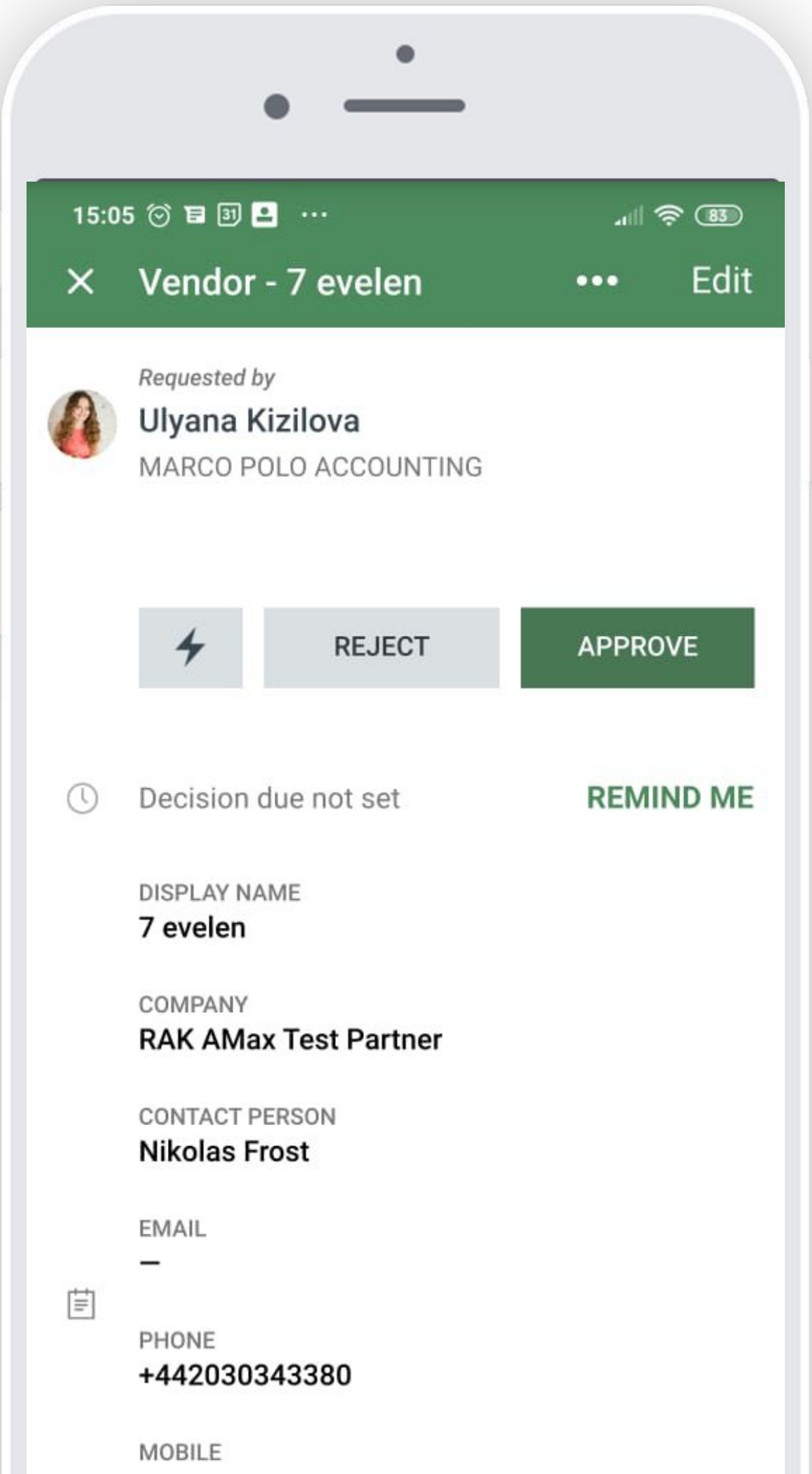
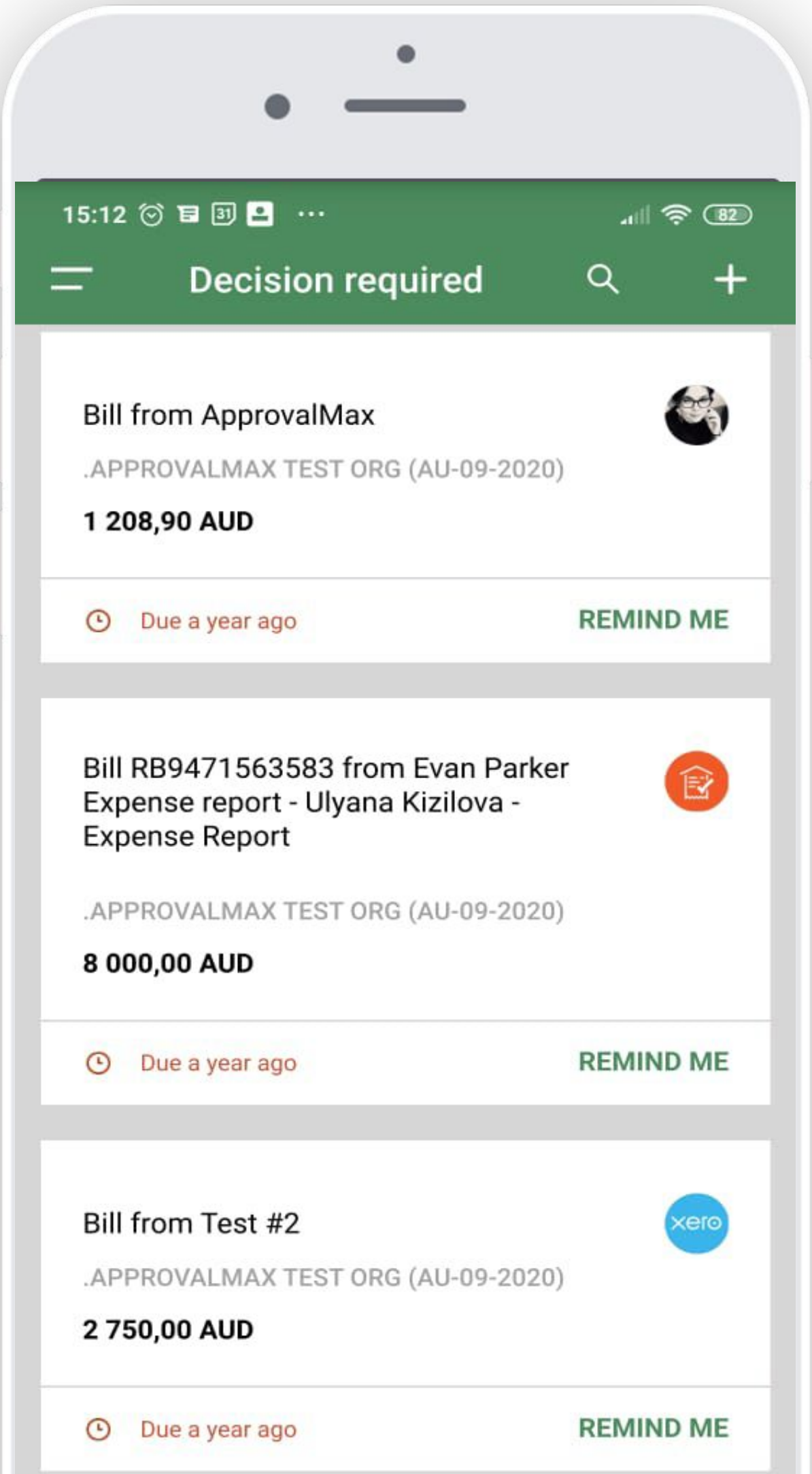


Work on the go

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.

216.00 GBP

Bill

Bill 20162212 from Accessories for Marketing

WOOD HARVEST LTD.



Please make a decision

REJECT


APPROVE

TOTAL TAX (20 %):

30.00 GBP

TOTAL:


216.00 GBP



Wolf Wunderlich

Submitted request for approval.

Mar 6, 2016 5:25 PM




Wolf Wunderlich


Why we need this? Is it company expense or your for private?

Mar 6, 2016 7:27 PM

Mar 6, 2016 7:28 PM

We are sponsor at the TIMBERSPORTS event and having BBQ. See <http://www.stihl.co.uk/next-event.aspx>






Willi Waldmeister

OK. Make a photo for our website when folks queueing up for sausages.


Mar 6, 2016 7:29 PM

Mar 6, 2016 7:30 PM

No sausages - we will have German bratwurst.



Leave comment





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

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