



September 2023

# Approver Guide for

- Xero
- QuickBooks Online
- Cin7 Core

Cloud Approval Workflows for Finance and Accounting

# Contents

## Basic setup

- Accept an invitation
- Change your user name, password, contact details, notification and security settings
- Reset your password
- Enable 2FA
- Set an out-of-office period
- Accept an invitation to an additional Organisation



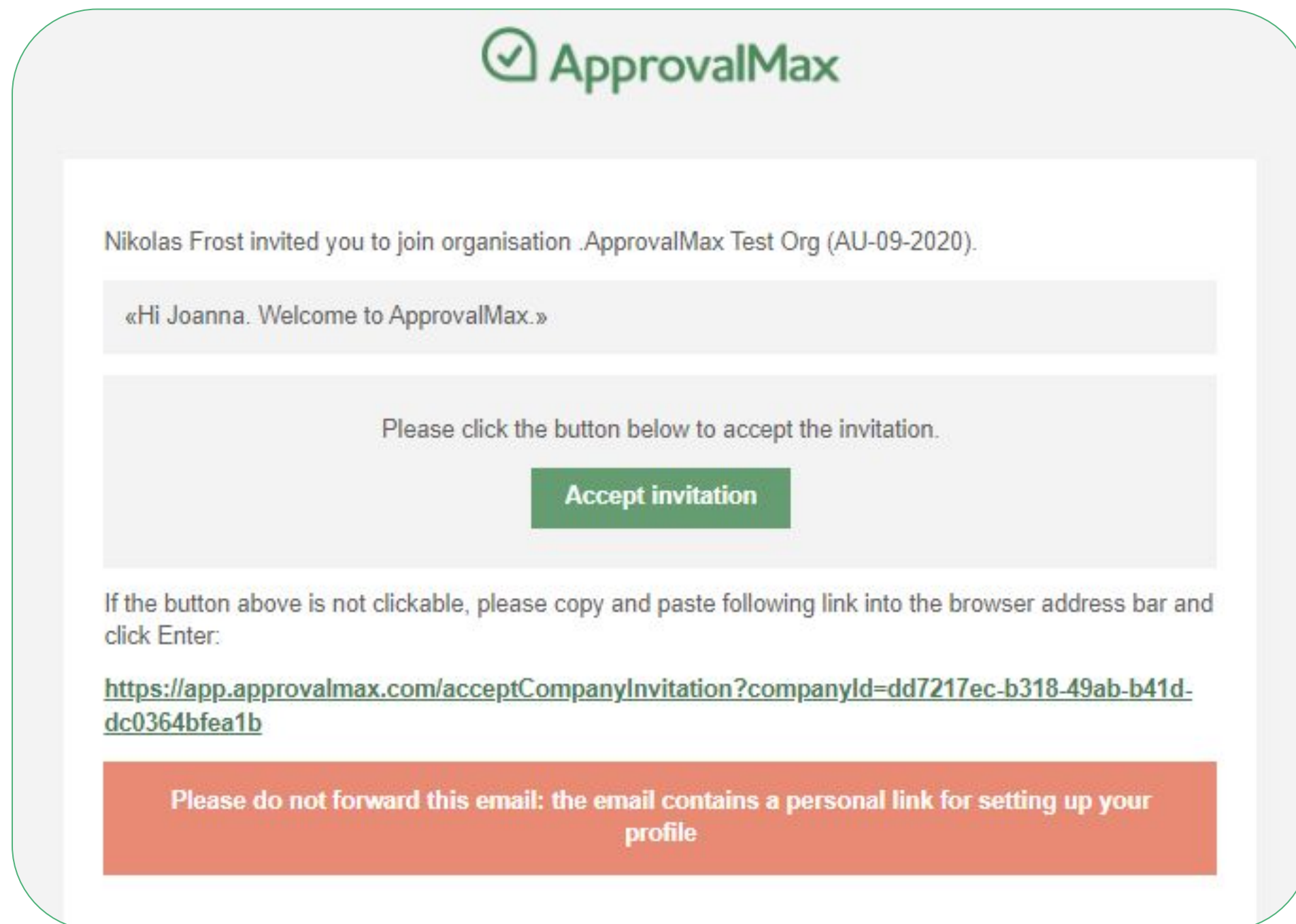
## Working with ApprovalMax

- Approval request lists
- Approval request view
- Bill Duplication Control
- Price Checker
- Goods Received Notes
- Approve/reject from an email notification
- Work on the go via the mobile app
- Collaborate with the Requester and other Approvers
- Reassign requests, add Approvers on the fly
- Add Watchers
- Xero: Bill Review and Coding
- Xero: Budget Checking
- Match Bills with Purchase Orders

# Accept an invitation

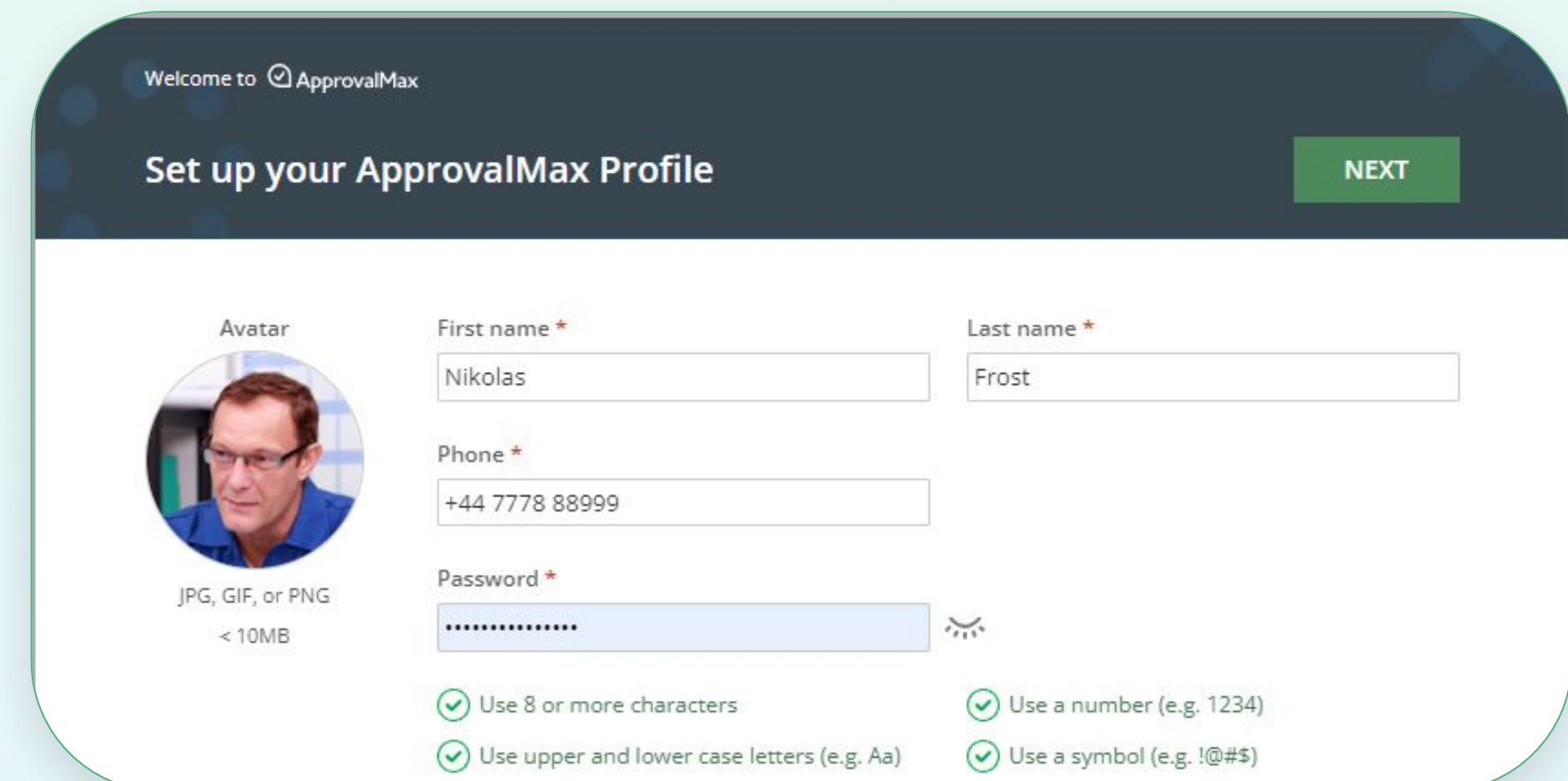
1

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



The screenshot shows an email interface with the ApprovalMax logo at the top. 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 a green button labeled "Accept invitation". At the bottom, there is a link: <https://app.approvalmax.com/acceptCompanyInvitation?companyId=dd7217ec-b318-49ab-b41d-dc0364bfea1b>. A red banner at the very bottom states: "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).

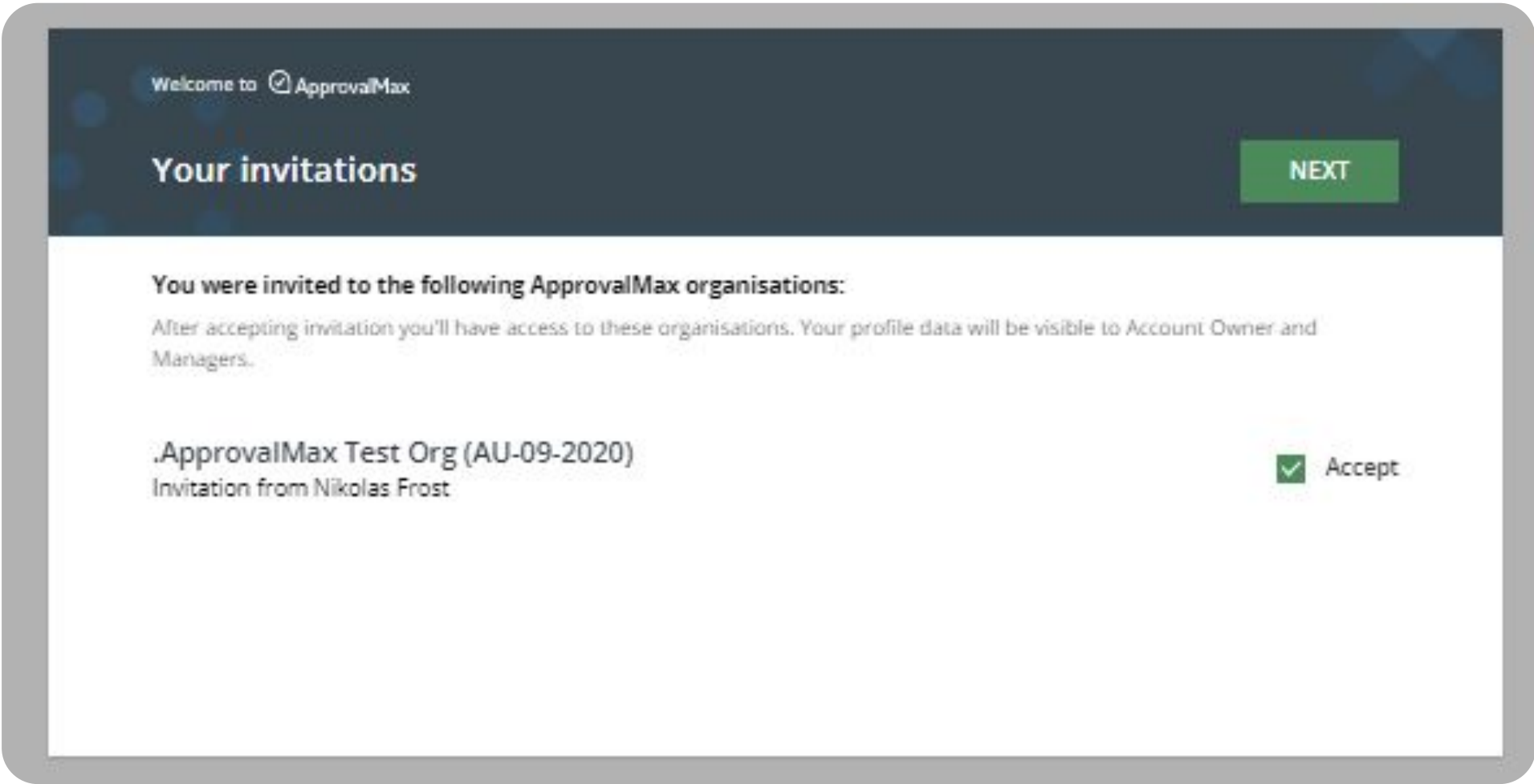


The screenshot shows a web form titled "Set up your ApprovalMax Profile" with a "NEXT" button in the top right corner. The form includes an "Avatar" section with a circular image of a man and the text "JPG, GIF, or PNG < 10MB". To the right are input fields for "First name \*" (containing "Nikolas") and "Last name \*" (containing "Frost"). Below these is a "Phone \*" field with "+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

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

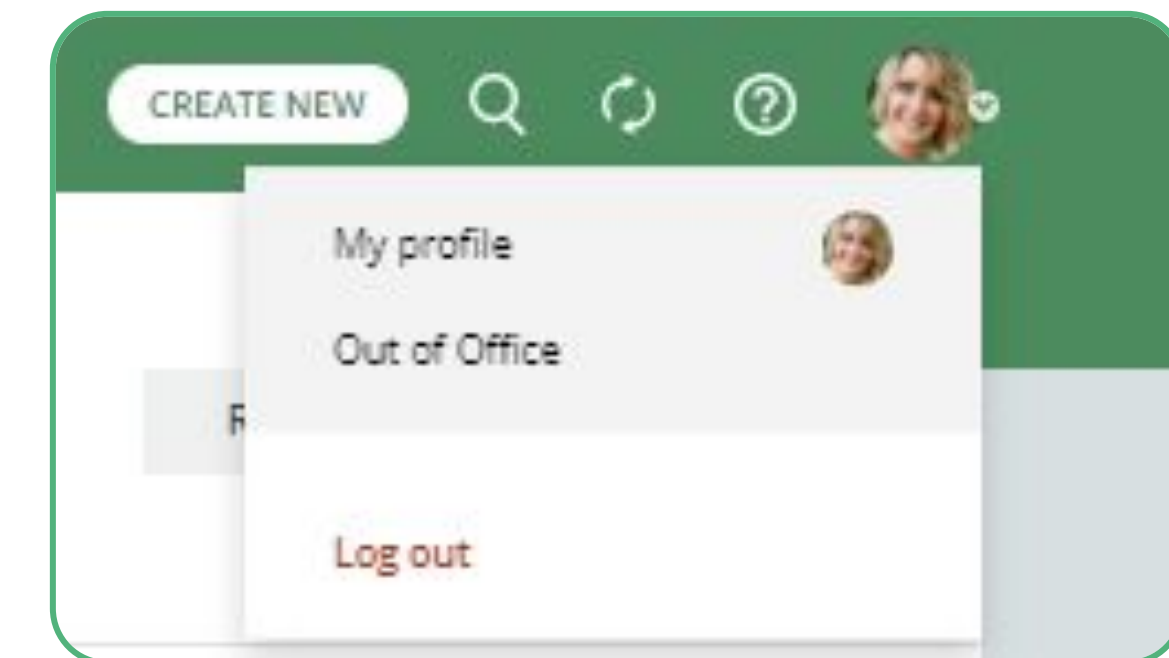
Users can change their name, password and time zone, upload an avatar or add a phone number any time.

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.

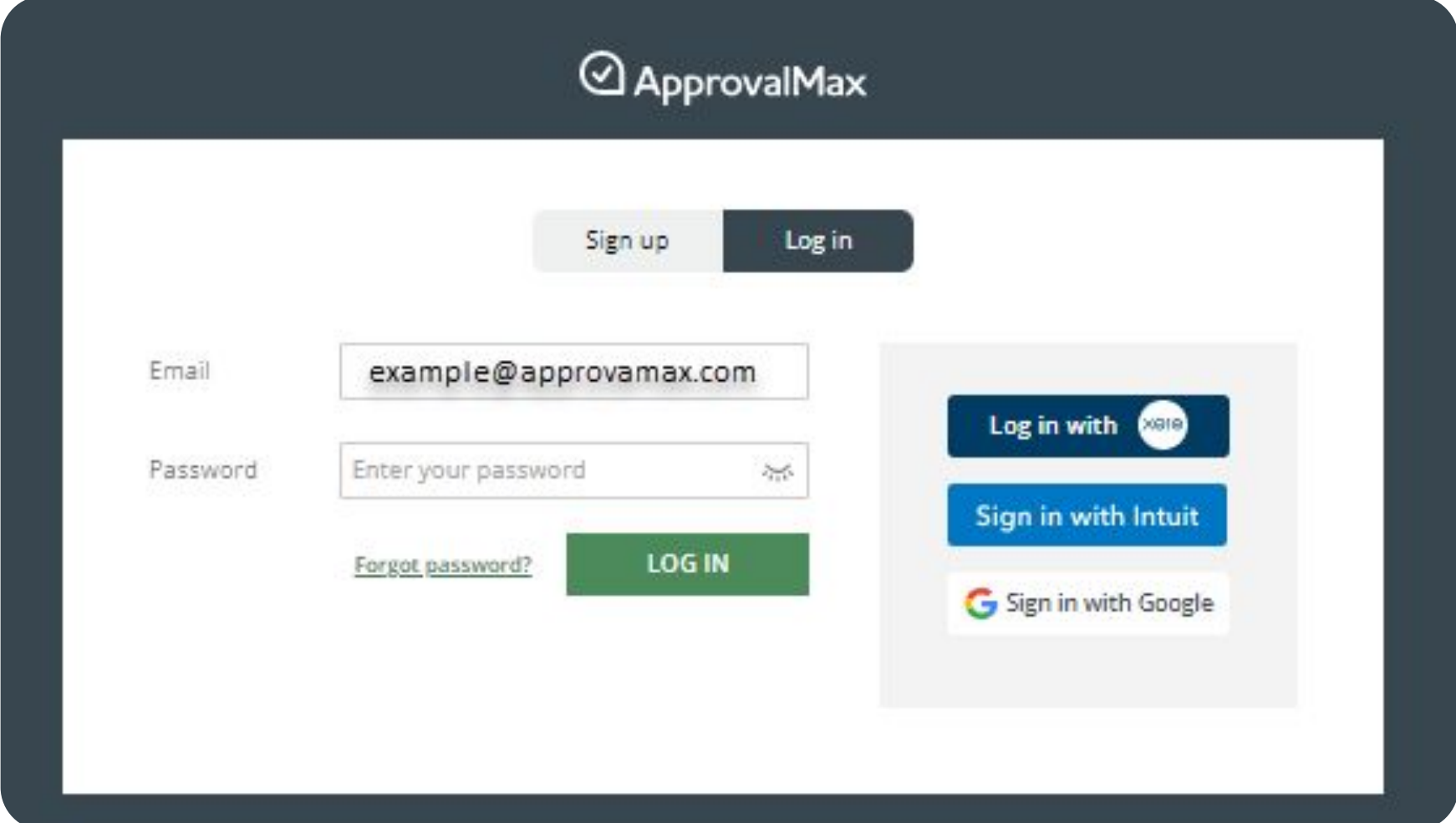
A screenshot of a web form titled 'Edit your profile'. The form includes fields for 'First name' (Joanna), 'Last name' (Green), 'Phone' (+44 20 3034 3380), and 'Time zone' ((UTC+00:00) Dublin, Edinburgh, Lisbo...). Below these are sections for 'Email notifications' (New requests, Comments, Other, Summary of pending approvals) and 'Security' (Log me out after 15 minutes of inactivity, Two-factor authentication). Each notification and security setting has a toggle switch. At the bottom, there is a link to 'CHANGE YOUR PASSWORD'.

# Reset your password

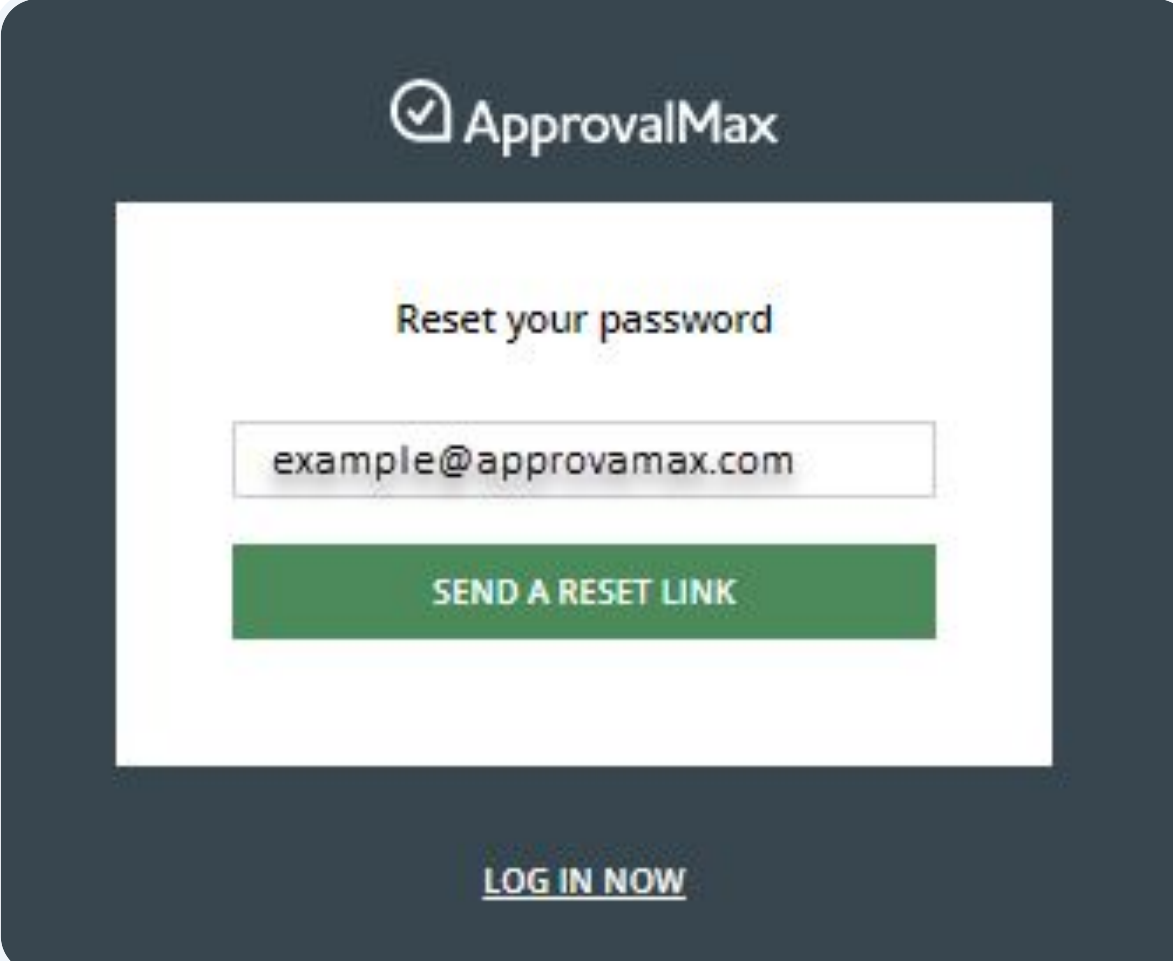
Resetting a forgotten password is easy in ApprovalMax.

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, the 'ApprovalMax' logo is displayed. Below it are 'Sign up' and 'Log in' buttons. The main form contains an 'Email' field with 'example@approvamax.com' and a 'Password' field with the placeholder 'Enter your password'. A 'Forgot password?' link is positioned below the password field. To the right of the form is a sidebar with social login options: 'Log in with Xero', 'Sign in with Intuit', and 'Sign in with Google'. A green 'LOG IN' button is located at the bottom right of the form area.

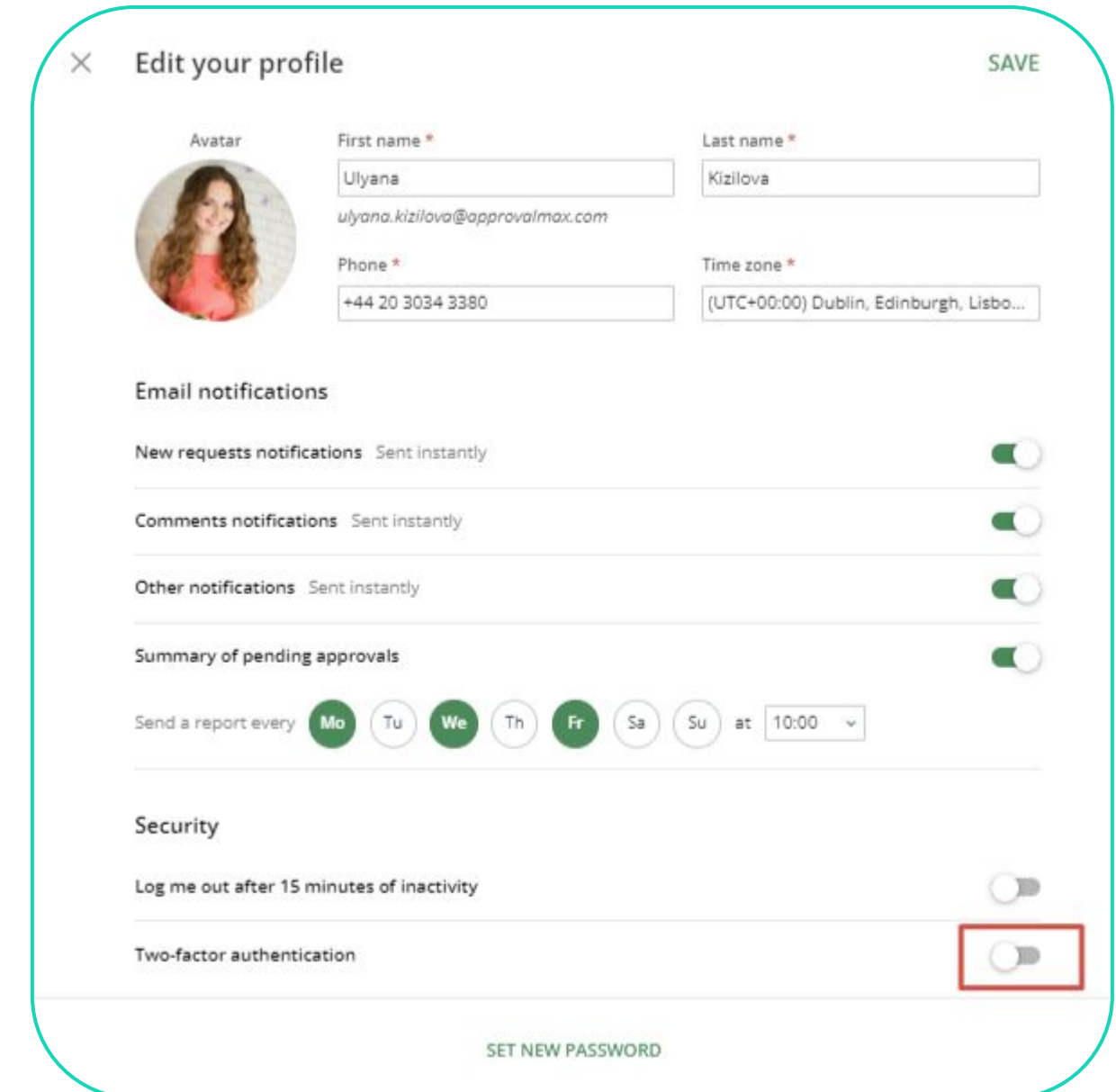


The screenshot shows the 'Reset your password' page in ApprovalMax. The title 'Reset your password' is at the top. Below it is an email input field containing 'example@approvamax.com'. A green button labeled 'SEND A RESET LINK' is positioned below the email field. At the bottom of the page, there is 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

Avatar  First name \*  Last name \*

ulyana.kizilova@approvalmax.com

Phone \*  Time zone \*

+44 20 3034 3380 (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 ☒

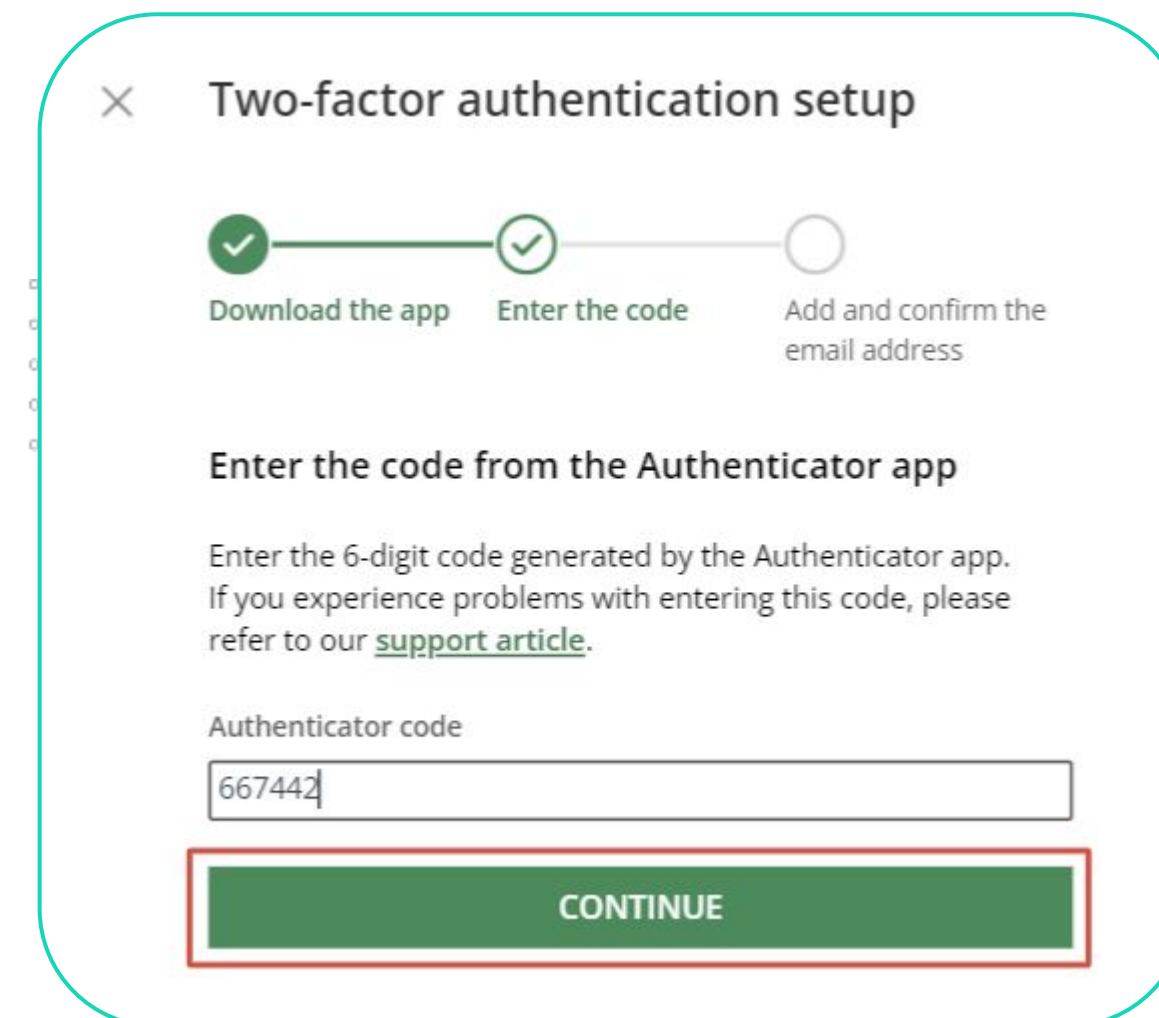
Send a report every ☐ Mo ☐ Tu ☒ We ☐ Th ☒ Fr ☐ Sa ☐ Su at  10:00

Security

Log me out after 15 minutes of inactivity ☐

Two-factor authentication ☒

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

667442



# 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.

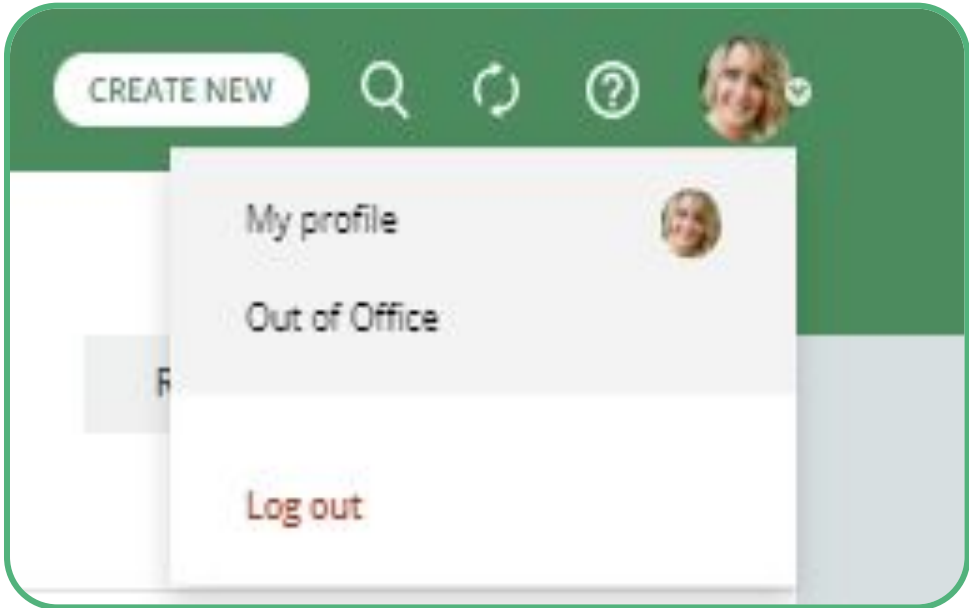
×

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



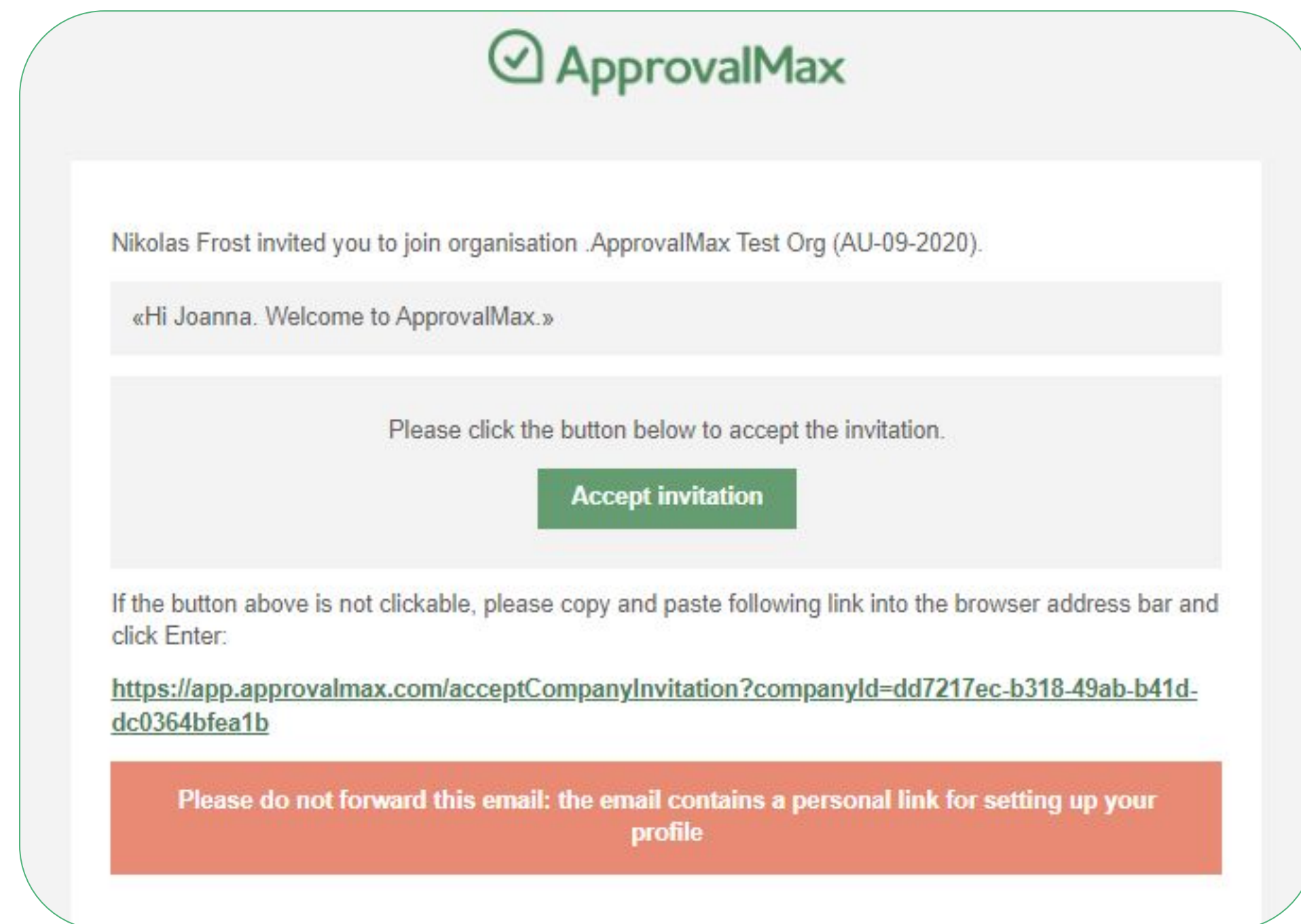
**Please note:** a Delegate won't see requests previously approved by the original Approver.

**Please note:** the Reviewer access (available in Xero Bill workflows) also gets delegated - if it has been assigned to the Approver who is currently out of office.

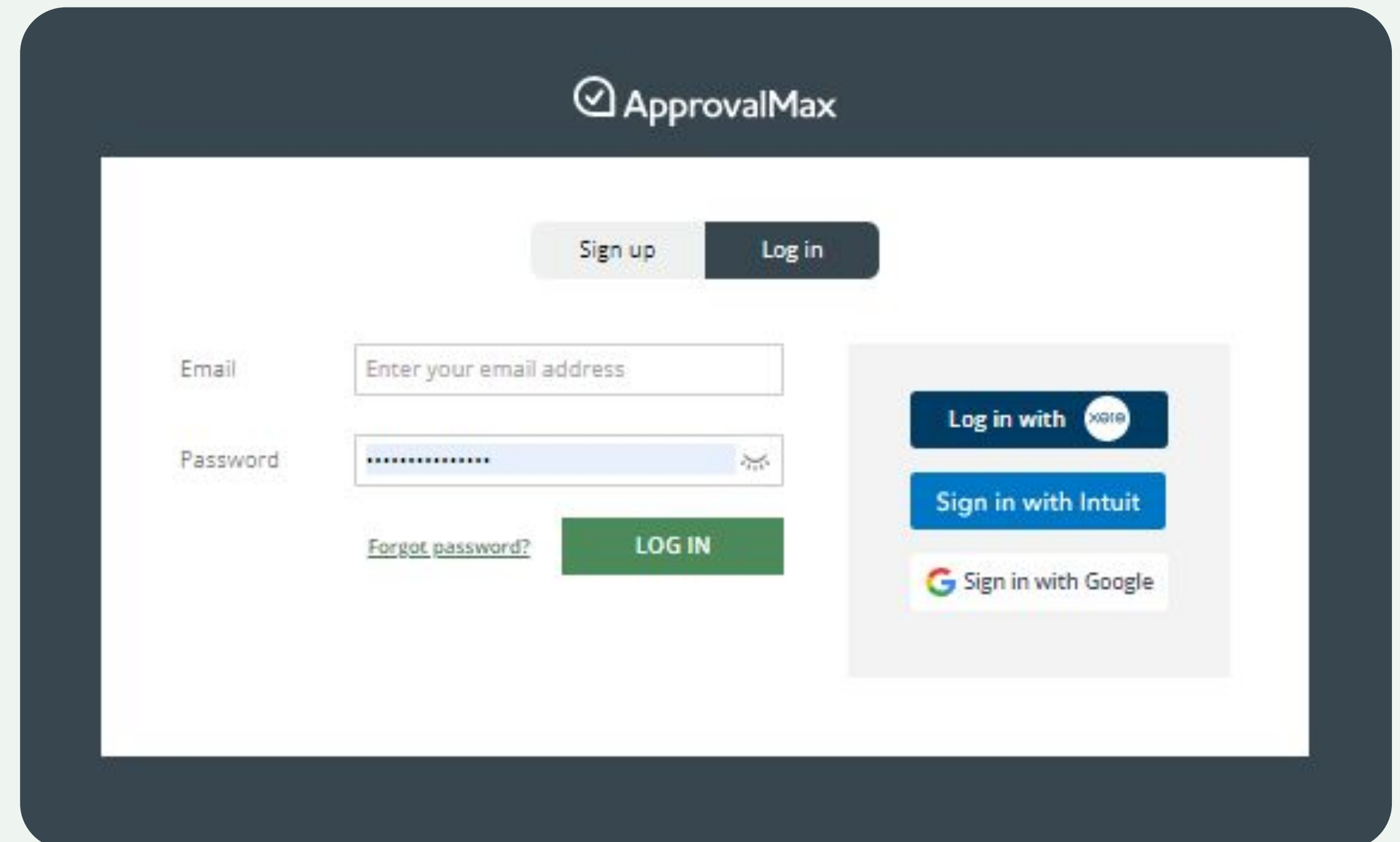


# Accept an invitation to an additional Organisation 1.1

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

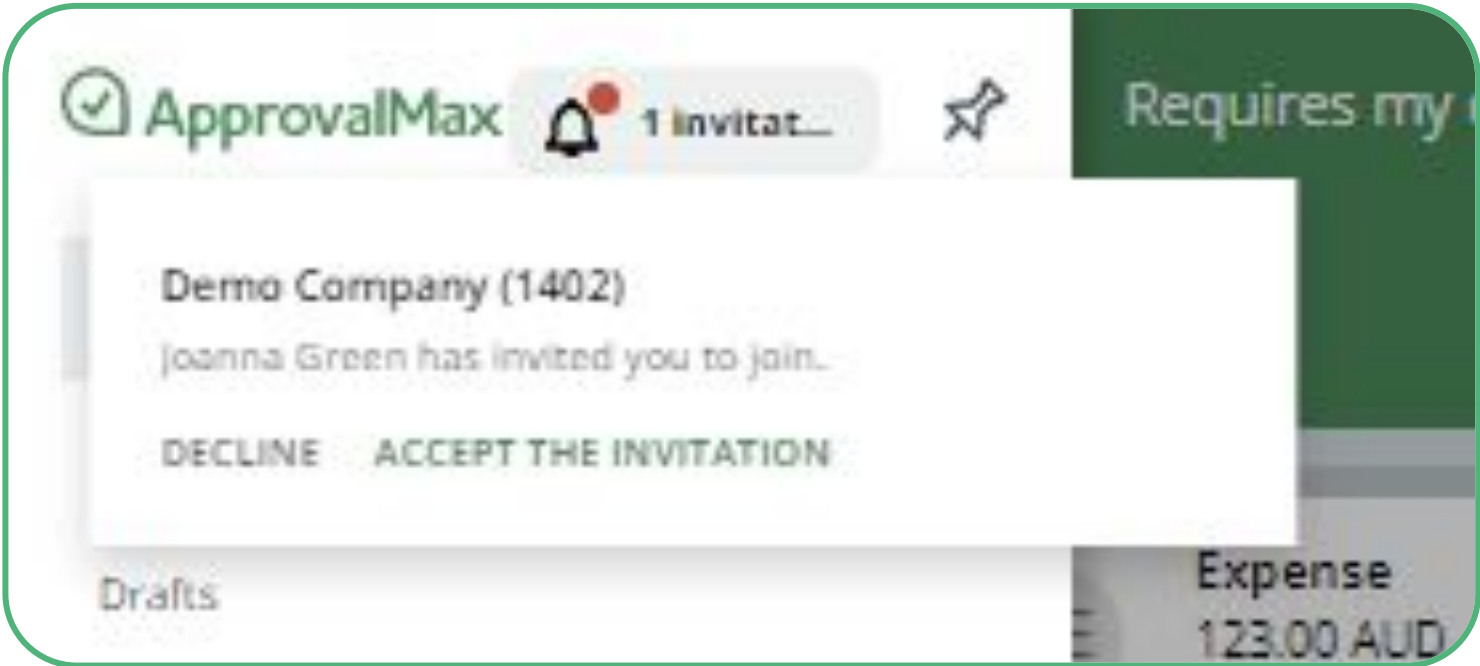
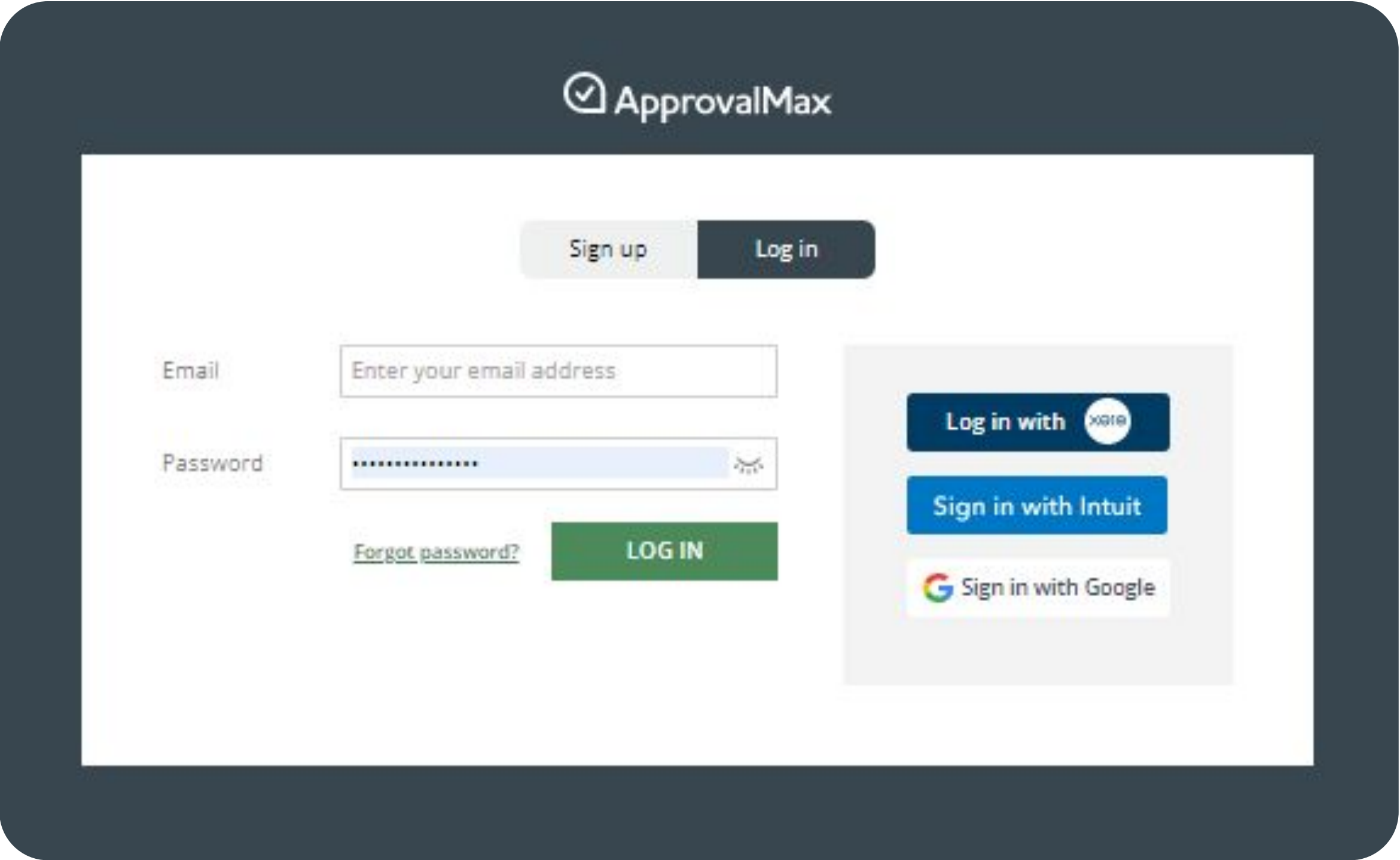


... and log in with your personal credentials.



# Accept an invitation to an additional Organisation 1.2

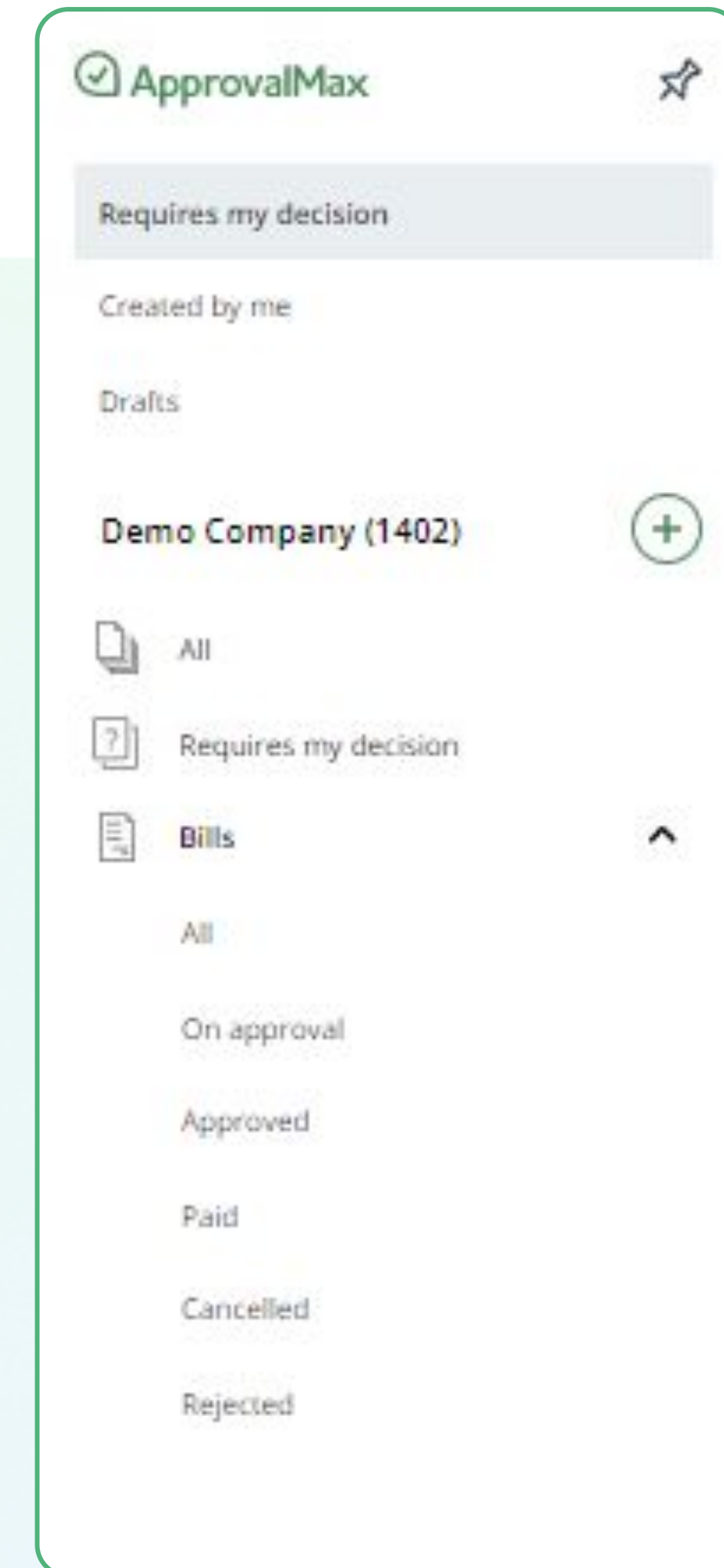
Or, you can log into your account and accept the invitation directly in ApprovalMax, you'll find it in the menu on the left.



# 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** requests 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/Expenses/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

Approval requests contain 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.
- Budget status and overview
- Matching

The screenshot displays the 'Approval request view' interface. At the top, a green header bar contains a menu icon, the text 'Requires my decision', and a 'CREATE NEW' button. The main content area is divided into two panels. The left panel shows a summary card for a bill from 'Marshall Ltd.' with a value of 1,099.00 AUD, submitted by Ulyana Kizilova, and a 'Due in a day' status. The right panel provides detailed information, including a 'REJECT' and 'APPROVE' button, a 'FILES' section with an attached image, a 'BUDGET' section with a table of affected budgets, a 'BILL TO PO MATCHING' section, an 'APPROVAL WORKFLOW' section showing the current step 'HOD' and the next step 'C-level', and an 'AUDIT TRAIL' section showing the history of the request.

Bill from Marshall Ltd. 1,099.00 AUD

Submitted by Ulyana Kizilova  
APPROVALMAX TEST ORG (AU-09-2020)

REJECT APPROVE

Due in a day

TOTAL: 1,099.00 AUD

FILES

design-65-545x545.jpg

BUDGET

The following budgets would be affected by the approval of this request:

Budget name	Location	Department	Account	Budget period	Remaining budget (AUD)	Amount (AUD)	Status
Design/Paris test	Do Not Filter	Do Not Filter	310 - Cost of Goods Sold	1 Jan 2022 - 31 Dec 2022	-5,470,204.53	999.09	✖

BILL TO PO MATCHING

This Bill is not currently matched with any Purchase Order.

MATCH WITH PO

APPROVAL WORKFLOW

HOD ACTIVE C-level

Approval condition: All

Mike Newman

AUDIT TRAIL

Ulyana Kizilova  
Added Mike Newman as an Approver to the "HOD" step

SHOW 1 EVENT

Leave a comment

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

# Bill Duplication Control for Xero and QuickBooks Online

ApprovalMax can detect potential duplicate Bills and displays a respective message.

Bill statuses taken into account are:

- Awaiting Approval
- Approved
- Paid (Xero)

The matching parameters are:

- Supplier/Vendor
- Date
- Amount (Total Net exact match, Currency exact match)

Bill from ABC Furniture

1,099.00 AUD

There is at least one other request that looks similar to the one you're currently reviewing. Please double-check it's not a duplicate:  
[Bill from ABC Furniture](#)

Submitted by Joanna Green  
APPROVALMAX TEST ORG (AU-09-2020)

⚡

REJECT

APPROVE

Bill actions: [EDIT](#) | [COPY](#) | [CANCEL](#)

Date	Due date	Reference
13 Oct 2022	13 Oct 2022	-

Item	Description	Qty	Unit price	Account	Tax	Amount AUD
100: iPhone	iPhone 12	1.00	1,099.00	720 - Computer Equipment	GST Free Expenses (0%)	1,099.00

Amounts are Tax Inclusive

Subtotal: 1,099.00 AUD

Includes Tax (0%): 0.00 AUD

TOTAL: 1,099.00 AUD

BILL TO PO MATCHING

This Bill is not currently matched with any Purchase Order.

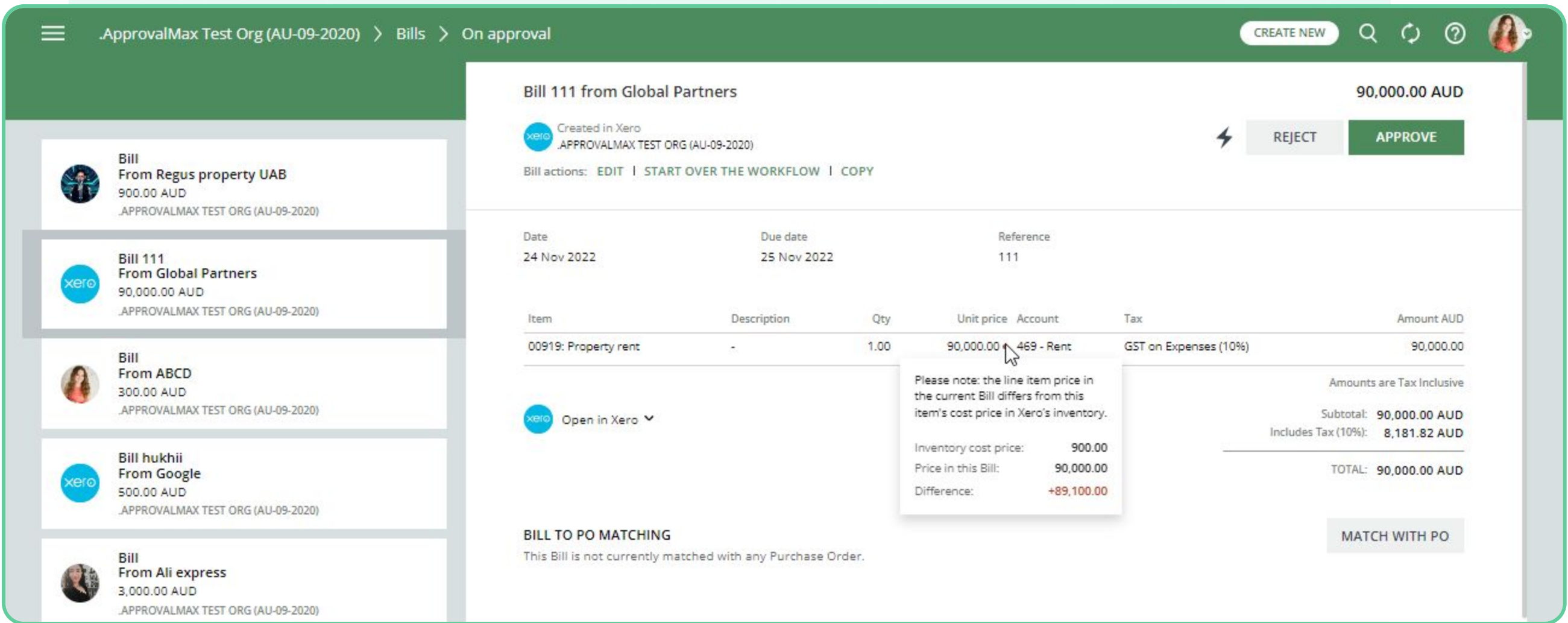
MATCH WITH PO

# Price Checker for Xero and QuickBooks Online

The Price Checker feature provides a price comparison for each line item in an approval request, based on the inventory list prices as per Products and Services catalogue.

It identifies and highlights any price discrepancy by applying coloured labels to such line items.

- If the deviation value is negative or one of the price values is null, the warning level is **None**.
- If the percentage deviation value is between 0 and 5, the warning level is **Yellow**.
- If the percentage deviation value is between 5 and 25, the warning level is **Orange**.
- If the percentage deviation value is above 25, the warning level is **Red**.



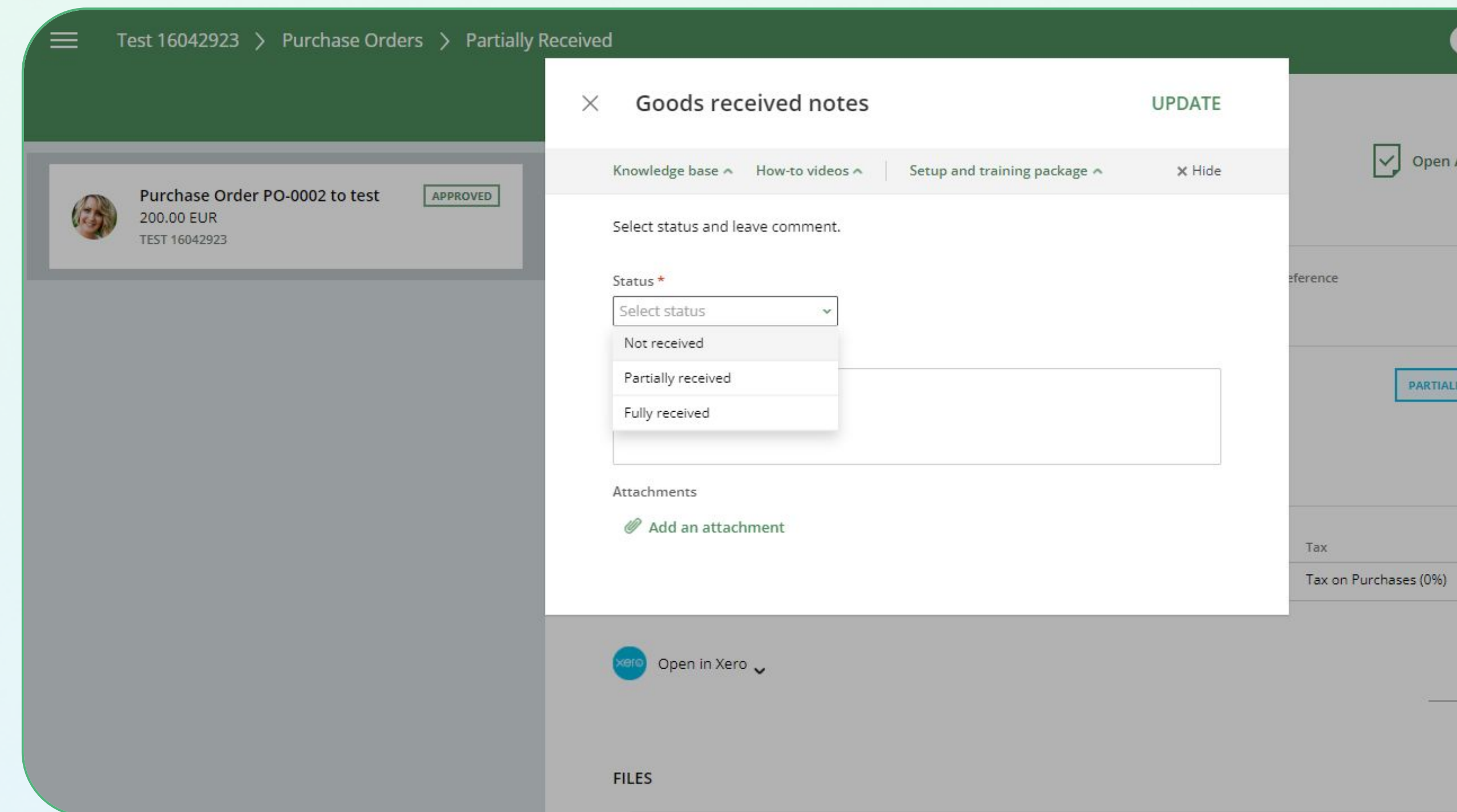


# Goods Received Notes for **Xero** and **QuickBooks Online**

ApprovalMax supports the proper way of tracking goods deliveries - with Goods Received Notes (GRN), an industrywide established term and approach.

## How it works:

- In each approved Purchase Order users can see the delivery status (and GRN).
- Purchase Order Requesters, Approvers and the Organisation Admins can change the delivery status, add comments, attach files (actual Goods Received Notes).
- Users can filter Purchase Orders by delivery status in the navigation.



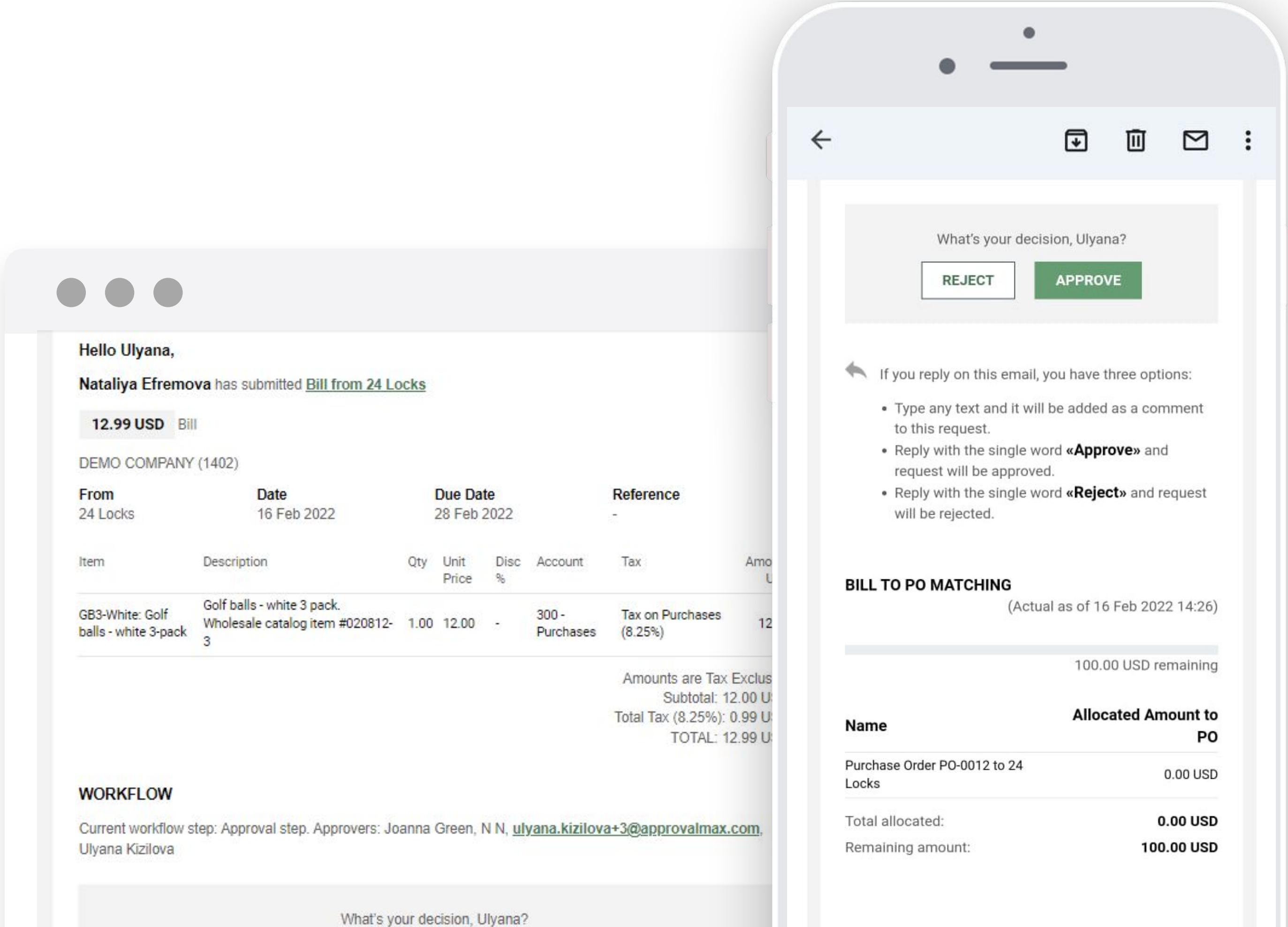
# Approve/reject from an email notification

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

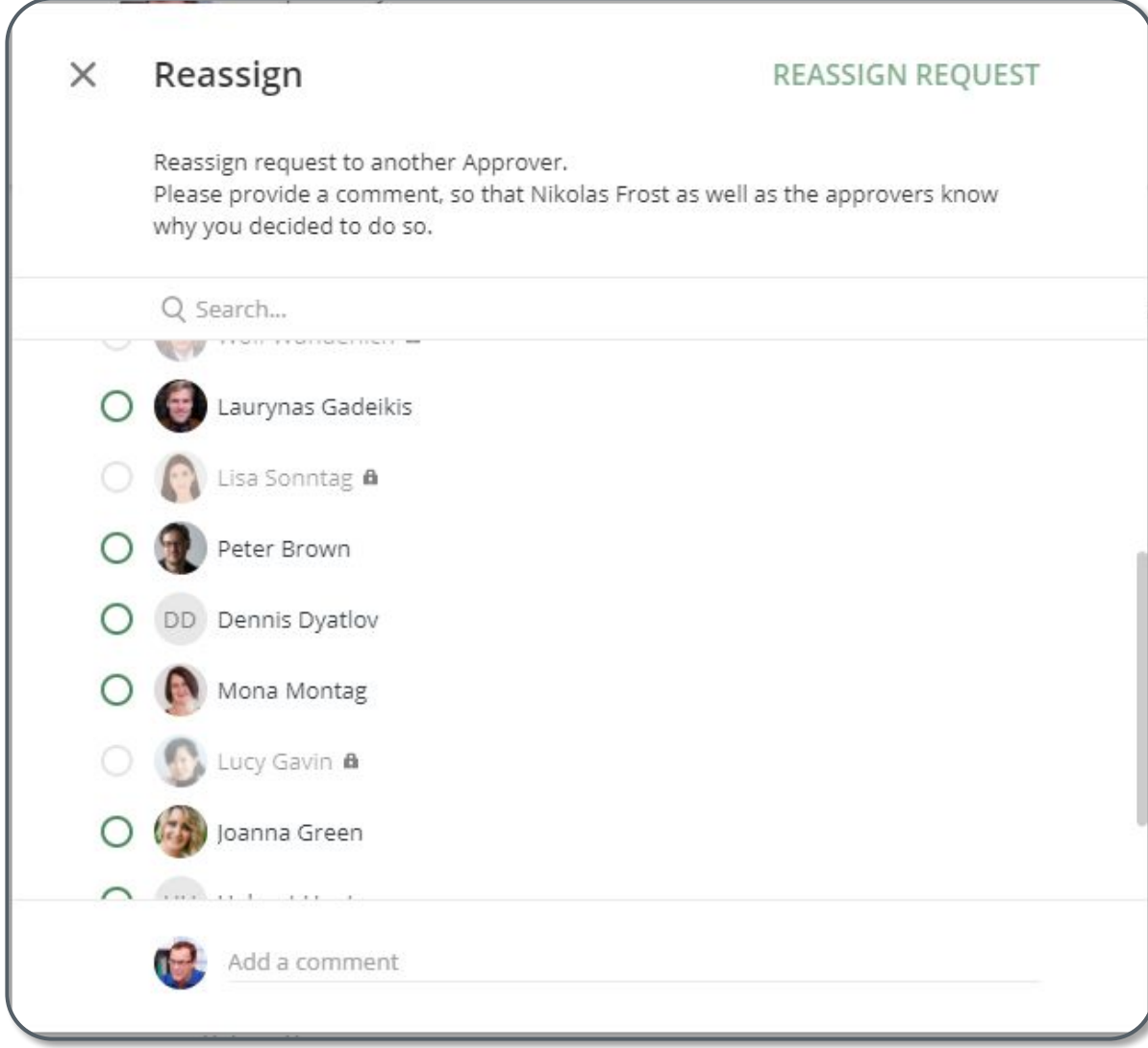
To reassign an approval request to a different Approver, click on the **Reassign** button  and select a new Approver.

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.

**Please note:** the Reviewer rights, if assigned to the Approver, won't be moved under a newly assigned Approver.



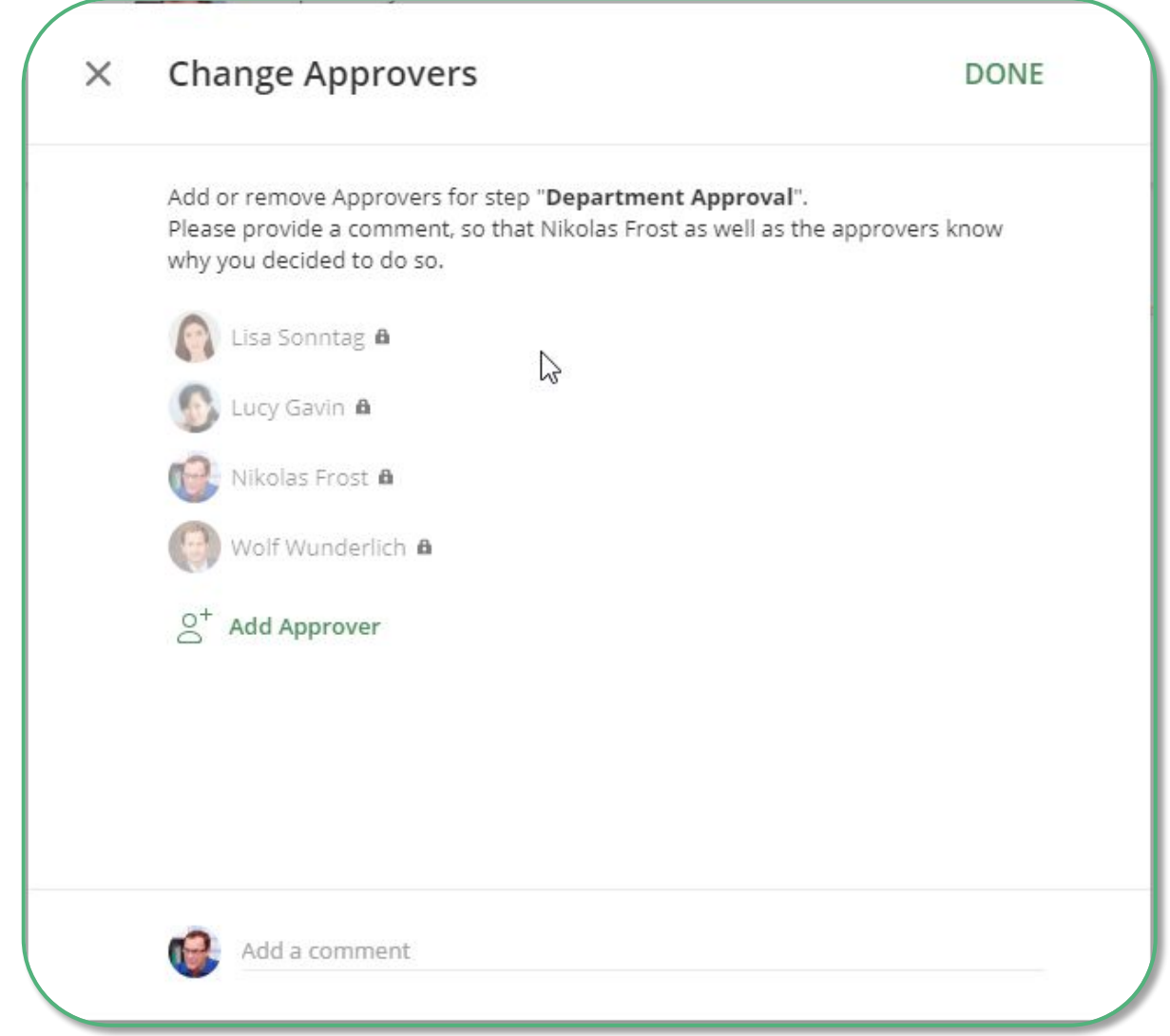
**Reassign** REASSIGN REQUEST

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.

Search...

- ☐ Laurynas Gadeikis
- ☐ Lisa Sonntag
- ☒ Peter Brown
- ☒ Dennis Dyatlov
- ☒ Mona Montag
- ☐ Lucy Gavin
- ☒ Joanna Green

Add a comment



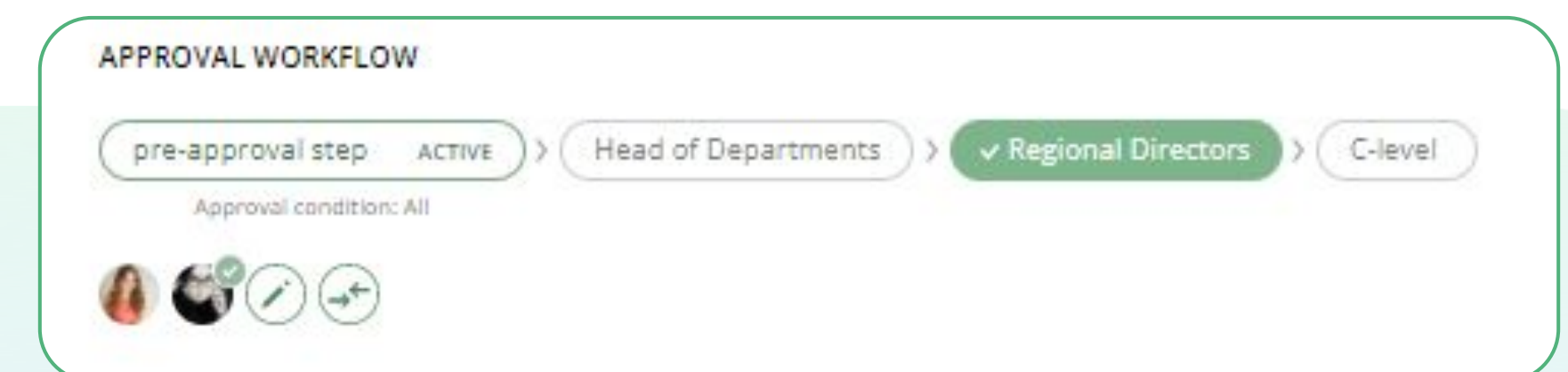
**Change Approvers** DONE

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



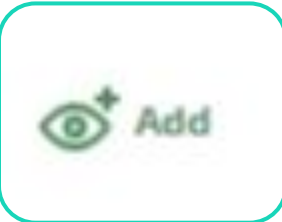


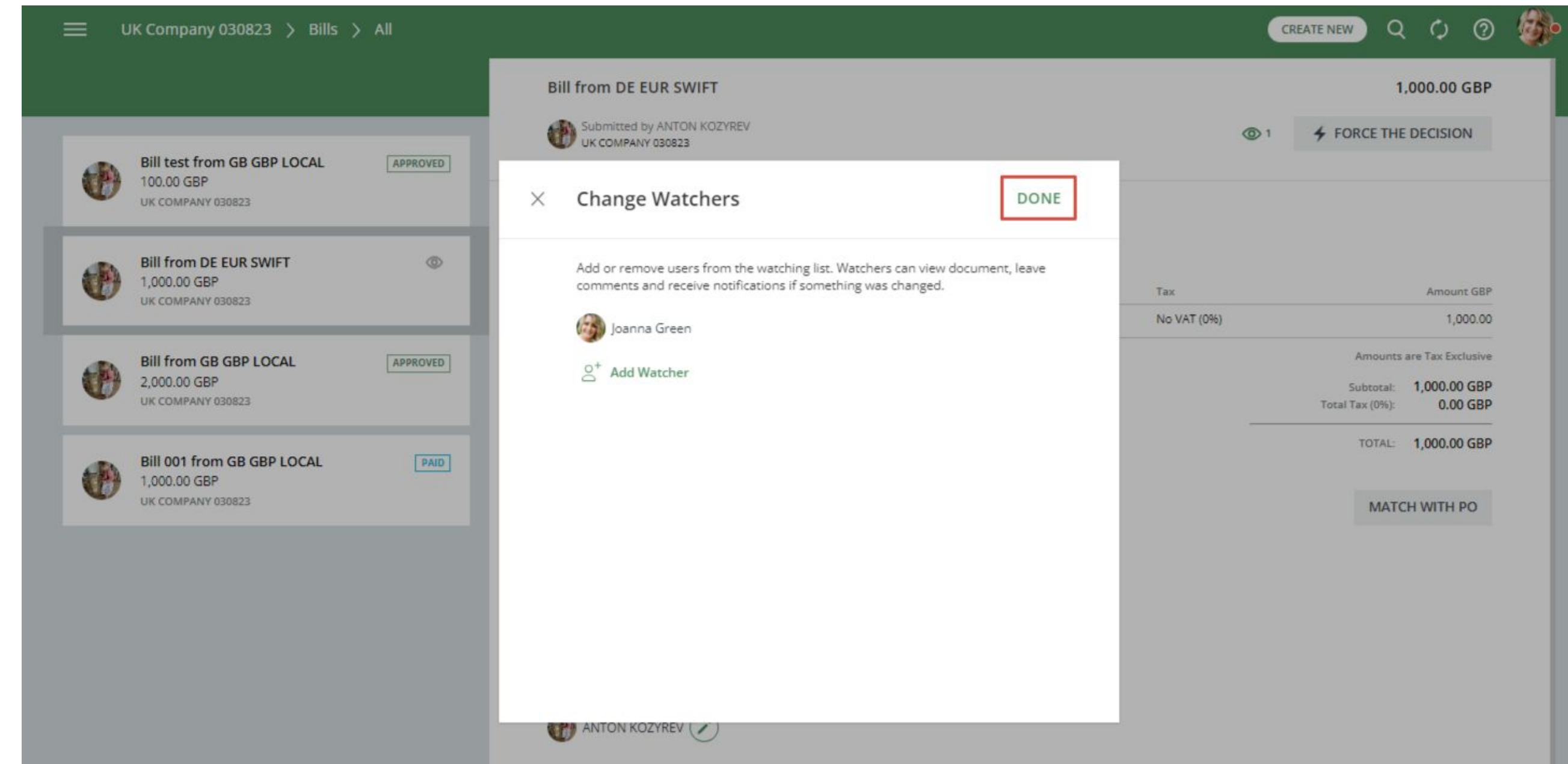
# Add Watchers

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

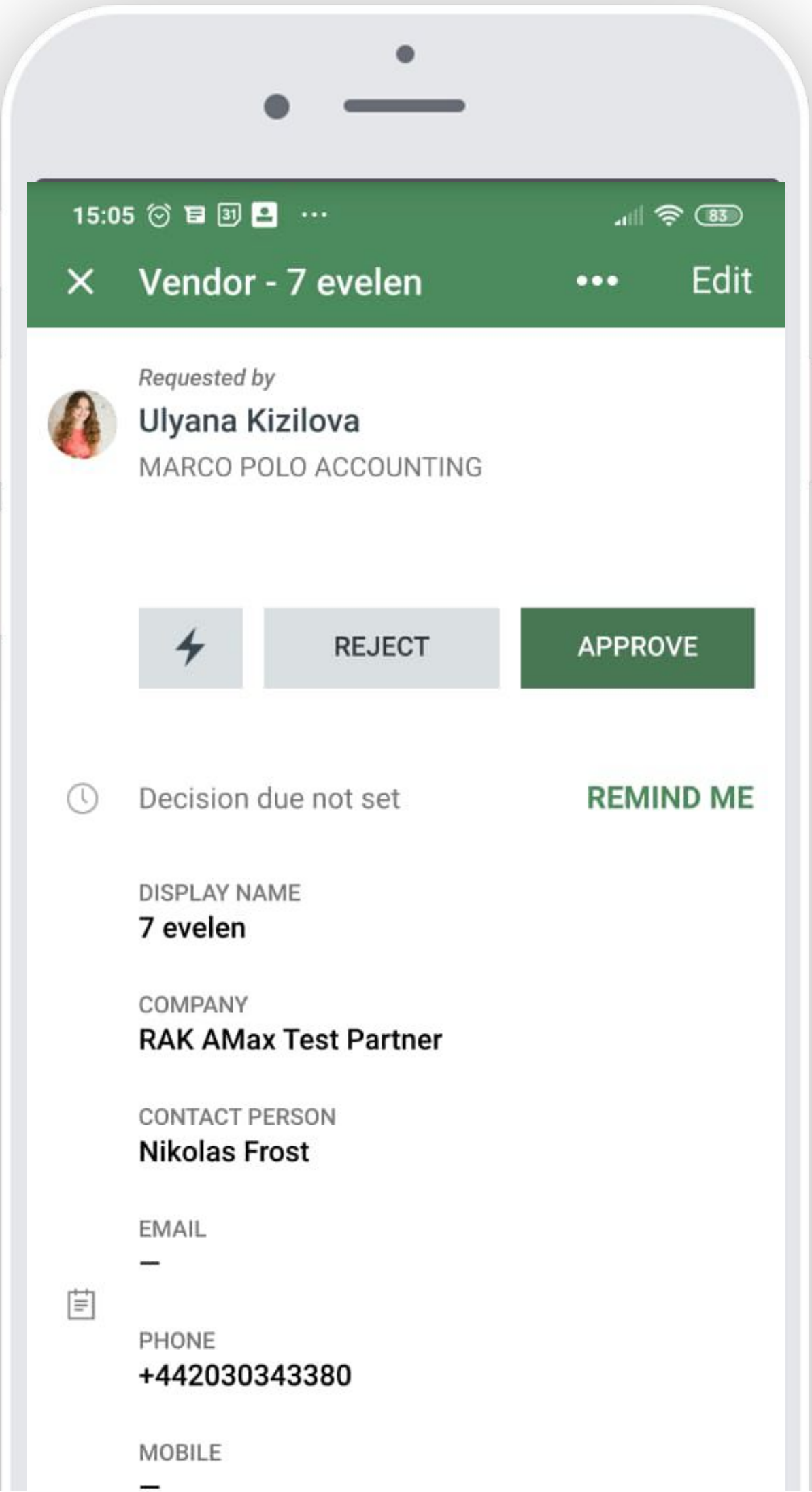
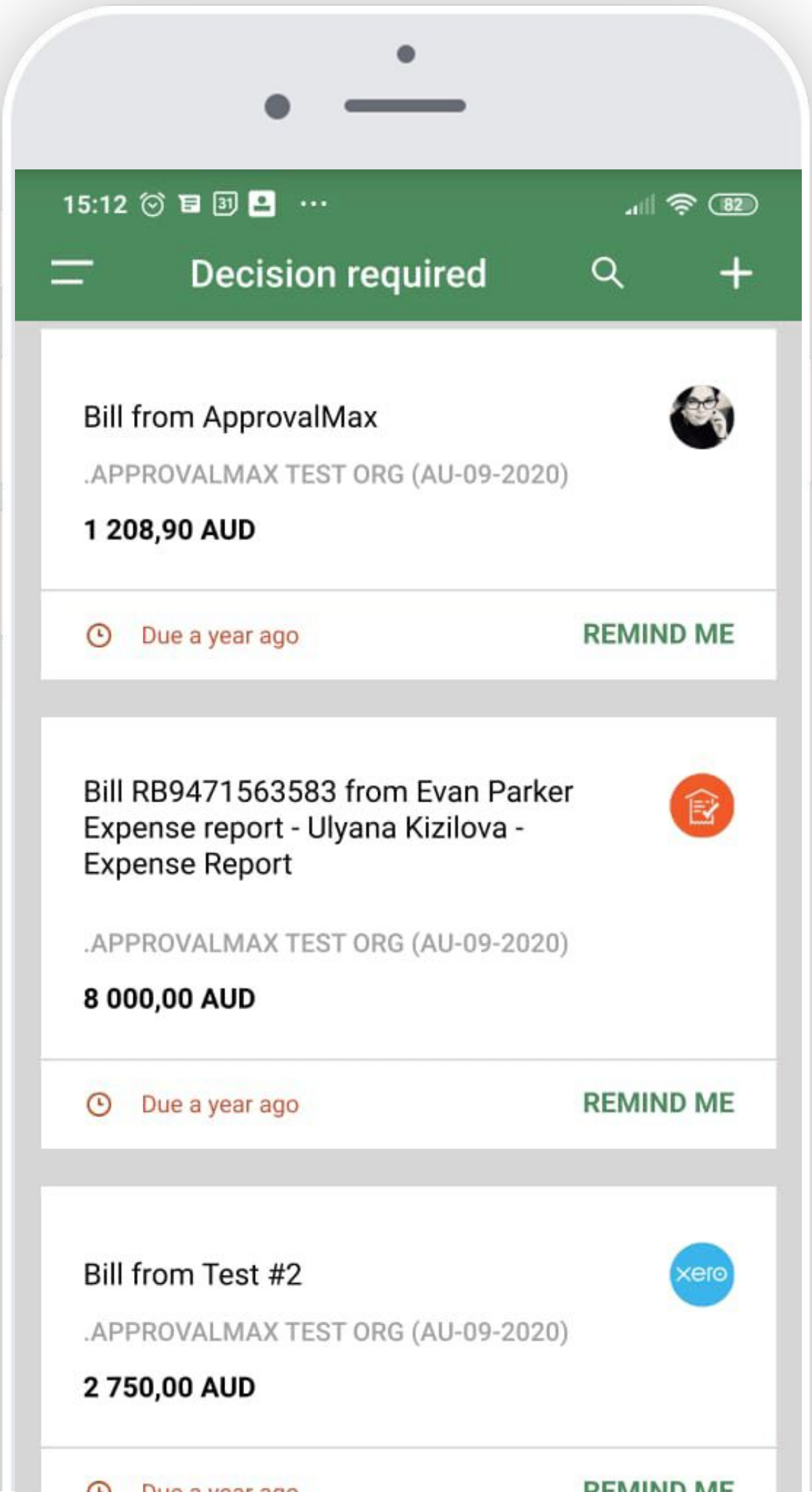


# Work on the go

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 a part of the audit trail report.

The screenshot displays a web interface for bill approval. At the top, a bill summary shows '216.00 GBP' and 'Bill'. Below this, the bill details are 'Bill 20162212 from Accessories for Marketing' and 'WOOD HARVEST LTD.'. A user profile picture is shown next to the text 'Please make a decision', with 'REJECT' and 'APPROVE' buttons. A table at the bottom right shows 'TOTAL: 216.00 GBP'. The main section is a comment thread. It starts with 'Wolf Wunderlich Submitted request for approval. Mar 6, 2016 5:25 PM'. This is followed by a comment from 'Wolf Wunderlich' asking 'Why we need this? Is it company expense or your for private?' at 'Mar 6, 2016 7:27 PM'. A response from an unnamed user (green bubble) says 'We are sponsor at the TIMBERSPORTS event and having BBQ. See <http://www.stihl.co.uk/next-event.aspx>' at 'Mar 6, 2016 7:28 PM'. Then, 'Willi Waldmeister' comments 'OK. Make a photo for our website when folks queueing up for sausages.' at 'Mar 6, 2016 7:29 PM'. A final response (green bubble) says 'No sausages - we will have German bratwurst.' at 'Mar 6, 2016 7:30 PM'. At the bottom is a 'Leave comment' input field and a submit button.



# Xero: Bill Review and Coding

Once the OCR has processed a Bill in Xero – and before its approval by a business manager – edits to the electronic version of the Bill might occasionally be required; for example splitting line items, changing accounts, adding tracking categories.

The Bill Review and Coding feature allows making such changes to a Bill in the first step of the approval process in ApprovalMax.

Reviewers can also add/remove Bill attachments during their review.

Requires my decision

CREATE NEW

Bill from Amazon900.00 AUD

31 Striv Rd  
ALFRED COVE, WA, 6154, Australia  
xero@test.com

Due in a day

REJECT

APPROVE

Submitted by Ulyana Kulova  
APPROVALMAX TEST ORG (AU-09-2020)

Bill actions: EDIT

Date17 Feb 2022

Due date19 Feb 2022

Reference-

Item	Description	Qty	Unit price	Account	Tax	Super Location	Department	Amount AUD
00919: Property rent		1.00	900.00	429 - General Expenses	GST on Expenses (10%)	Singapore	Design	900.00

Amounts are Tax Inclusive

Subtotal: 900.00 AUD

Includes Tax (10%): 81.82 AUD

TOTAL: 900.00 AUD

BUDGET

The following budgets would be affected by the approval of this request:

Budget name	Location	Department	Account	Budget period	Remaining budget (AUD)	Amount (AUD)	Status
Design/Paris test	Do Not Filter	Do Not Filter	429 - General Expenses	1 Jan 2022 - 31 Dec 2022	1,091.81	818.18	✓

BILL TO PO MATCHING

This Bill is not currently matched with any Purchase Order.

MATCH WITH PO

APPROVAL WORKFLOW

HOD

ACTIVE

C-level

Approval condition: All

Edit a Bill in "ApprovalMax Test Org (AU-09-2020)"

SAVE AND APPROVE

BILL DETAILS

Contact \*Ali express

Date27 Jun 2022

Due date \*30 Jun 2022

ReferenceEnter the Reference

LINE ITEMS

AUD Australian Dollar

Amounts areTax Inclusive

ITEM	DESCRIPTION	QTY	UNIT PRICE	ACCOUNT	TAX RATE	TAX AMO...	SUPER LOCATION	DEPARTMENTS	AMOUNT
1001000: Laptop	Laptop	1.00	3,000.00	310 - Cost of Good...	Custom 8.25 (8.25%)	228.64	Select super location	Select departments	3,000.00
110: Magic Mouse	Magic Mouse	1.00	59.00	453 - Office Expens...	GST on Expenses (...)	5.36	Select super location	Select departments	59.00

Subtotal: 3,059.00 AUD

Includes Tax (10%): 5.36 AUD

Includes Tax (8.25%): 228.64 AUD

TOTAL: 3,059.00 AUD

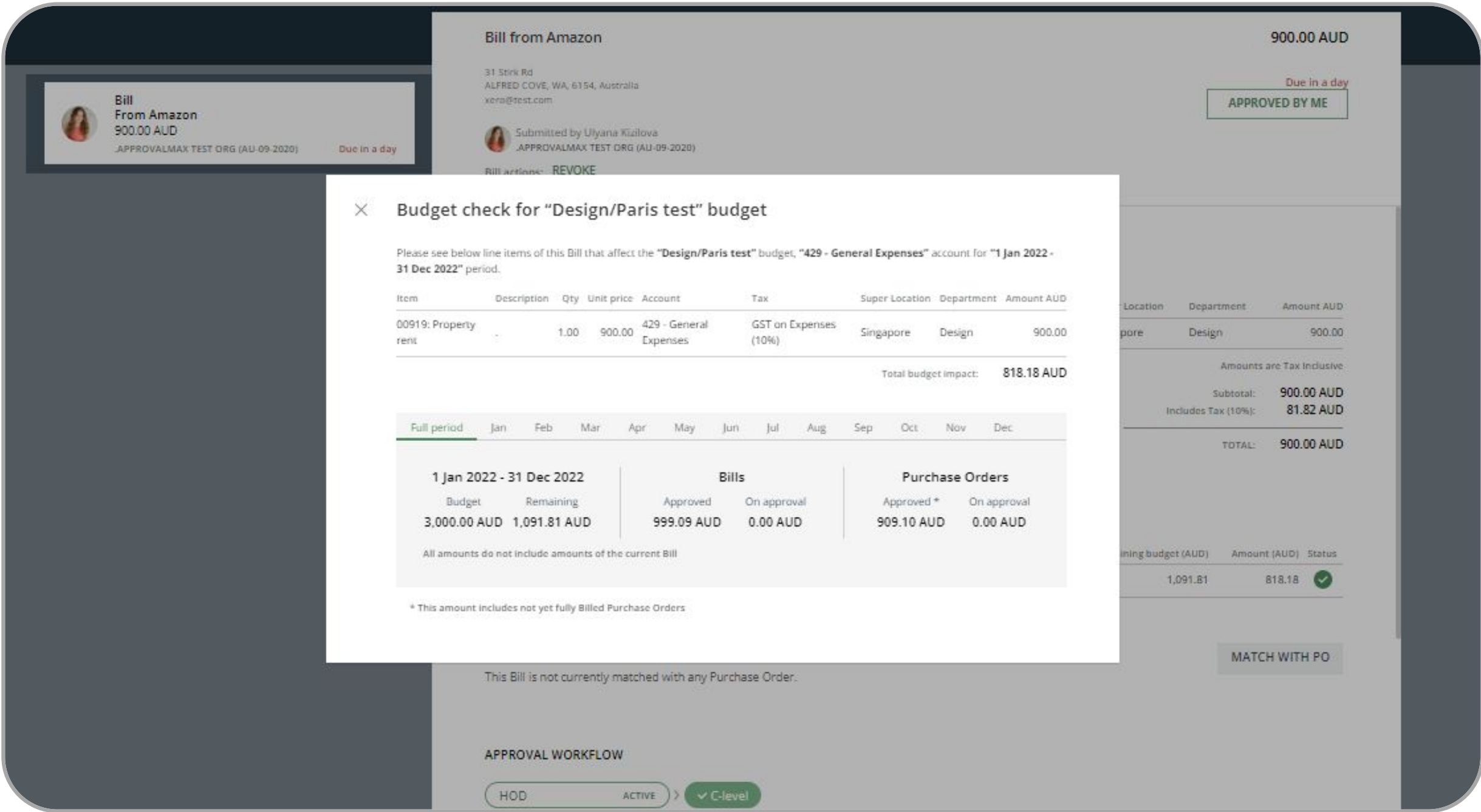
FILES

Add an attachment

# Xero: Budget Checking

The amounts in documents pending approval are automatically checked against the assigned budgets and a warning will be given if an amount exceeds them. **Please note:** the Budget Checking feature is available with the Xero Advanced and Premium plans only.

- Approvers can see:
- Which budgets are affected by a particular Bill/Purchase Order
  - How exactly a particular Bill/Purchase Order will impact the applied budgets

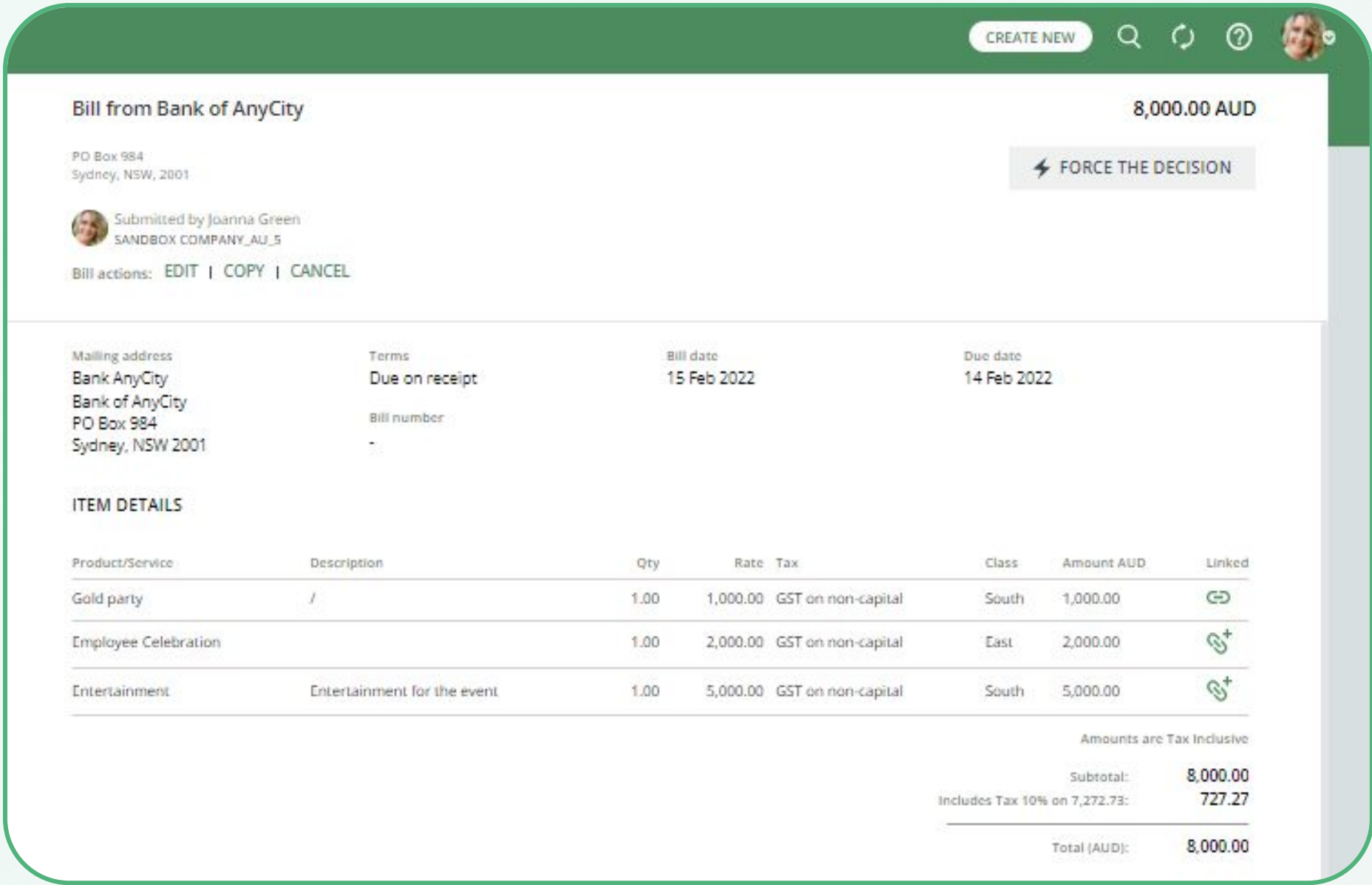




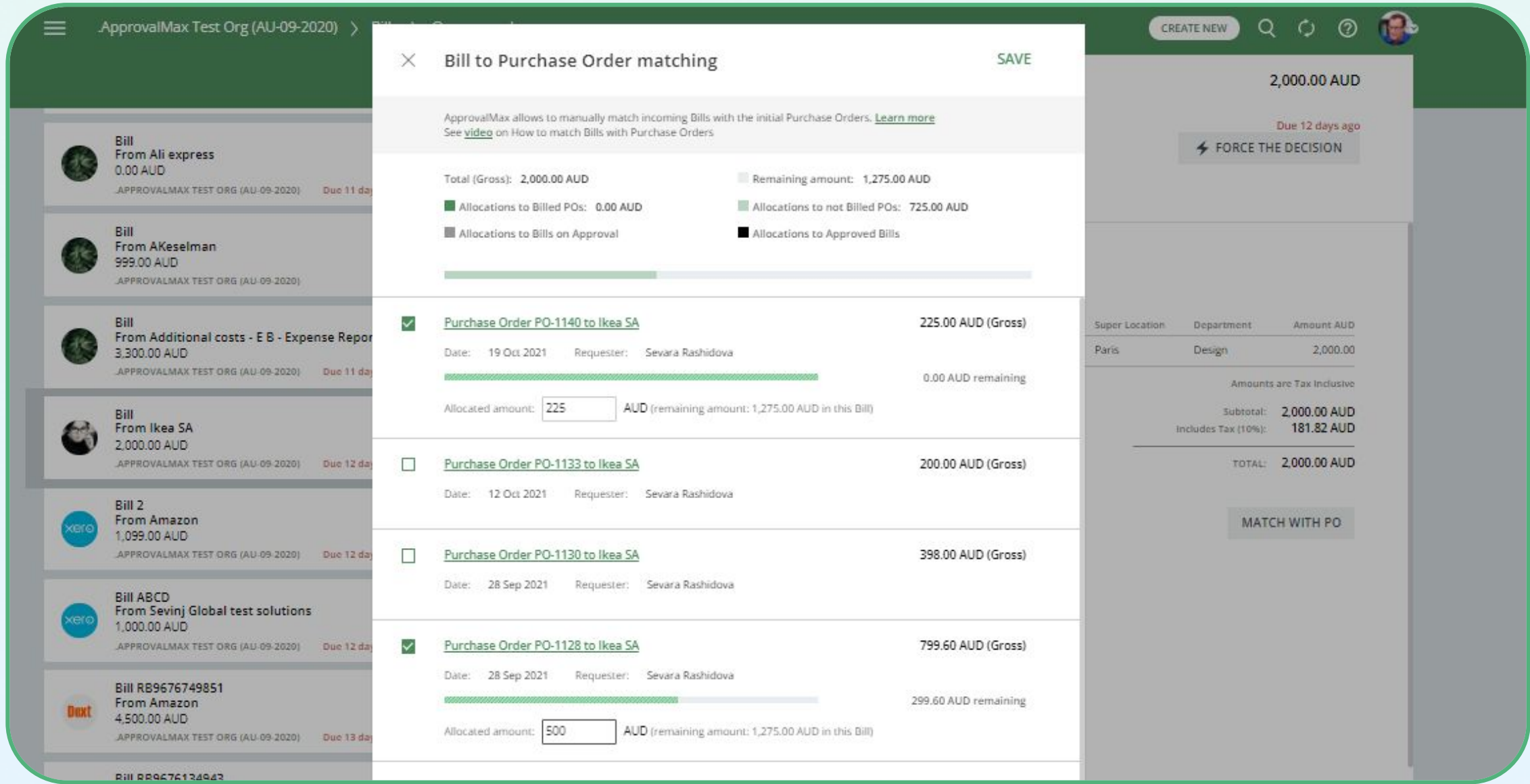
# Match Bills with Purchase Orders (Xero and QuickBooks Online)

Approvers can manually match incoming Bills with the original Purchase Orders before making their approval decision. This enables a much tighter control and higher accuracy for the approval process.

QuickBooks Online Bill Approvers can match Bills to approved Purchase Orders with the same Product/Service or Category and Vendor up to the final Bill approval.



Xero Bill Approvers can match Bills to approved Purchase Orders with the same Currency and Supplier up to the point where the Bill gets approved.  
**PLEASE NOTE:** Purchase Orders should not be marked as Billed.







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

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