ApprovalMax

September 2023

ApprovalMax for Accounting and Bookkeeping firms

Cloud Approval Workflows for Finance and Accounting

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ApprovalMax for accounting and bookkeeping firms

ApprovalMax has direct benefits for accounting and bookkeeping firms that provide the following services: outsourced bookkeeping, treasury services, month end reporting, management reporting, cash flow and bill management, audit, compliance and advisory.

ApprovalMax enhances the performance and efficiency of firms that manage accounts payable

Improve client experience by minimising the risk of human error and providing your clients with an easy way to approve financial documents. By automating the approval part of accounts payable process you also get better data and can prepare reporting faster.

Share responsibility and reduce your firm risks: If you're paying bills on behalf of your clients, it's important to ensure you're only paying approved bills. ApprovalMax ensures your client understands the details of each bill, so you can make payments with confidence. Sharing this responsibility reduces fraud risk and means bills can be paid on time.

Standardise your clients' approval workflows: Whether your clients are using Xero, QuickBooks Online, or NetSuite, you can rest easy knowing there's a trusted blueprint for their approval process. This saves time and effort, especially when onboarding new clients.

Make your audit process easier: With automatically generated detailed audit report you can say goodbye to hours of audit preparation. All authorisation information is just within several clicks.

Keep your GL for accounting staff only: When using ApprovalMax, there's no need to give users from your client's business access to Xero to approve financial documents. They only get notifications for the bills they need to see and approve when it suits them. This keeps financial data safe and private.

Build flexible approval workflows: The approval matrix in ApprovalMax allows users to set up custom and multi-level approval workflows. Transactions are reviewed and approved by those with delegated authority, based on their specific roles and responsibilities, providing

ApprovalMax Partner Programme

The ApprovalMax Partner Programme is designed for bookkeeping, accounting and advisory practices as well as cloud integrators who use online accounting software like Xero, QuickBooks Online or NetSuite.

Our Partners can act as ApprovalMax resellers or include the app into their service package at a discounted rate.

Members of the ApprovalMax Partner Programme are entitled to:

- Free 1:1 interactive training and consultation on demand with a personal manager

- Premium support by email and phone

- Free ApprovalMax license for your own use

- Partner discounts, which allow to include ApprovalMax in service packages or resell it to clients

- Partner Learning and Certification Programme

- Joint marketing opportunities

Partner onboarding: log in or sign up

The ApprovalMax Partner Portal enables the online sign-up for our Partner Programme.

It also provides access to Partner-exclusive materials for the ApprovalMax onboarding and daily use.

Visit https://partner.approvalmax.com

Log in if you already have an ApprovalMax account or create one by clicking on **SIGN UP**

⊘ ApprovalMax

Welcome to the ApprovalMax Partner portal

In order to apply for the ApprovalMax Partner Programme, you need to be logged in to ApprovalMax.
Please log in now if you already have an ApprovalMax account, or create one by clicking on SIGN UP.

Should you have any questions, please contact us on partner@approvalmax.com

LOG IN   SIGN UP

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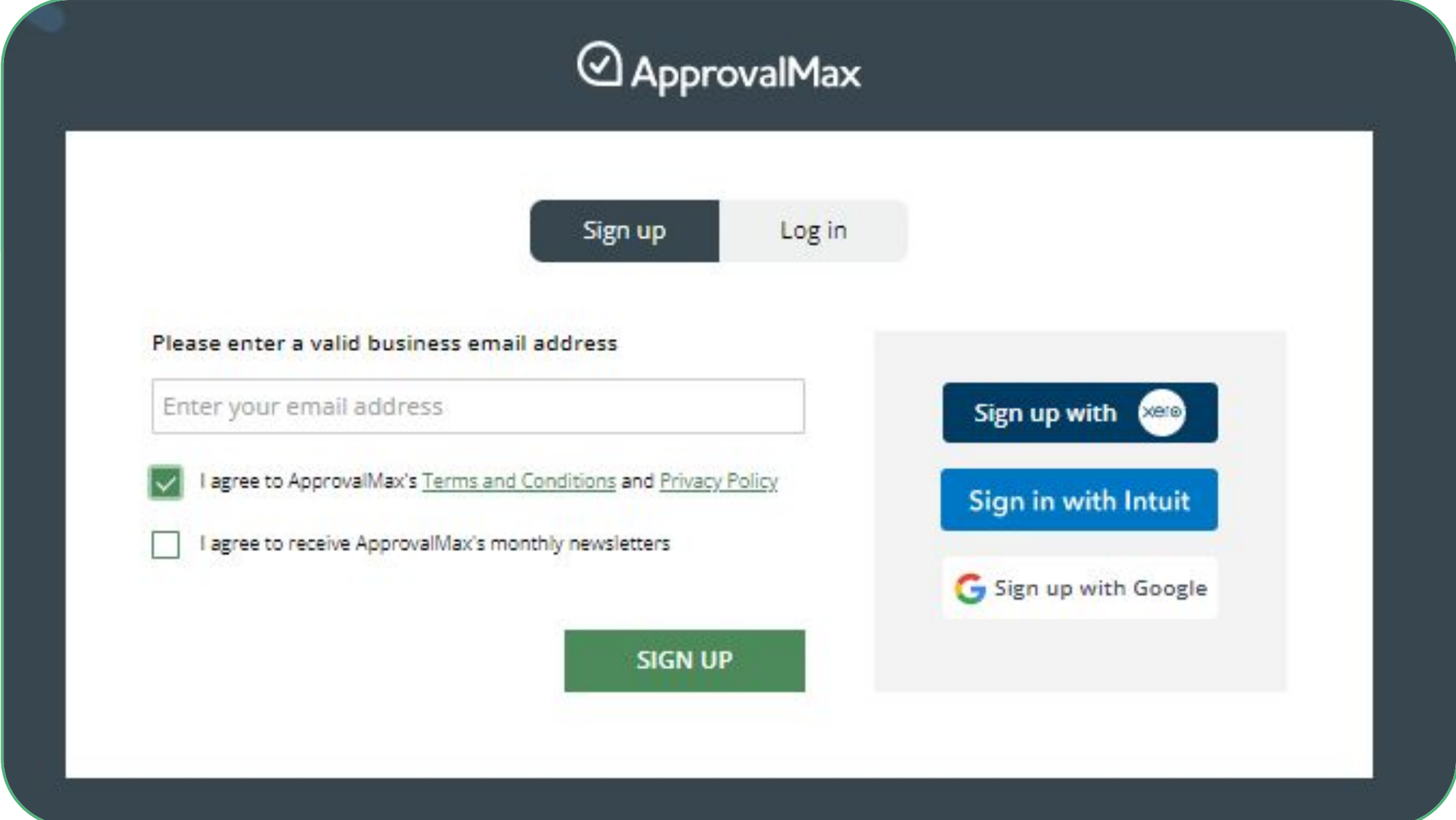
How to sign up with ApprovalMax

You have several options to sign up with ApprovalMax:
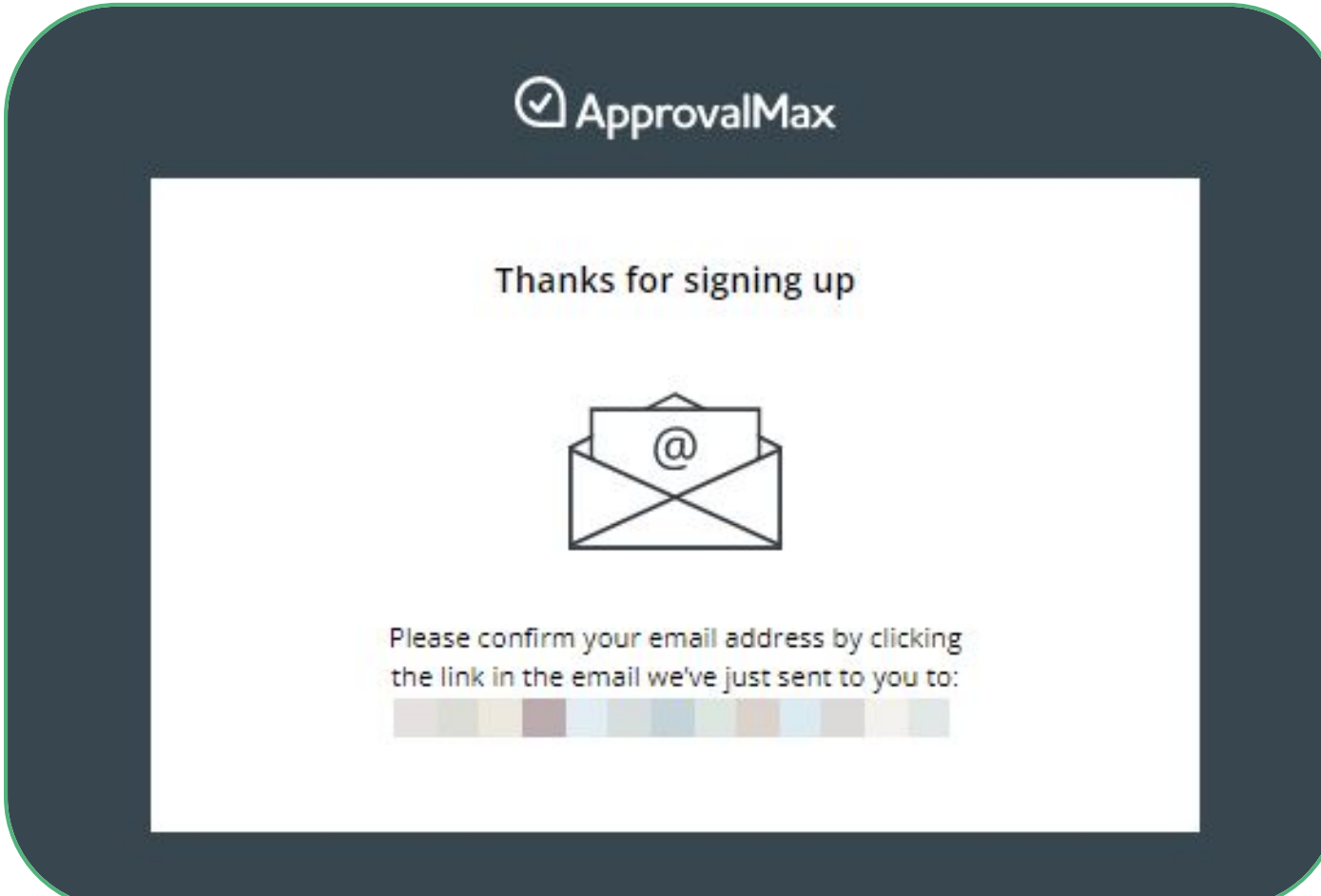
Enter a valid business email address and click on SIGN UP.

Or, alternatively, you can use your Xero/Intuit/Google account for signing up with ApprovalMax. With the single-sign-up procedure, ApprovalMax will automatically connect to your Xero/Intuit/Google account.

In case, you have chosen the first option, confirm your email address and then set up your profile.

How to sign up with ApprovalMax

Enter your profile details and set the password.

You can change your name, password, upload an avatar, and add phone number at any time.

Partner onboarding: application procedure

Fill in the required information and submit your application

Partner onboarding: Partner Argeement signing

Next, you'll be prompted to sign ApprovalMax Partner Agreement.

Read the "Electronic Record and Signature Disclosure", fill in your details and sign the agreement.
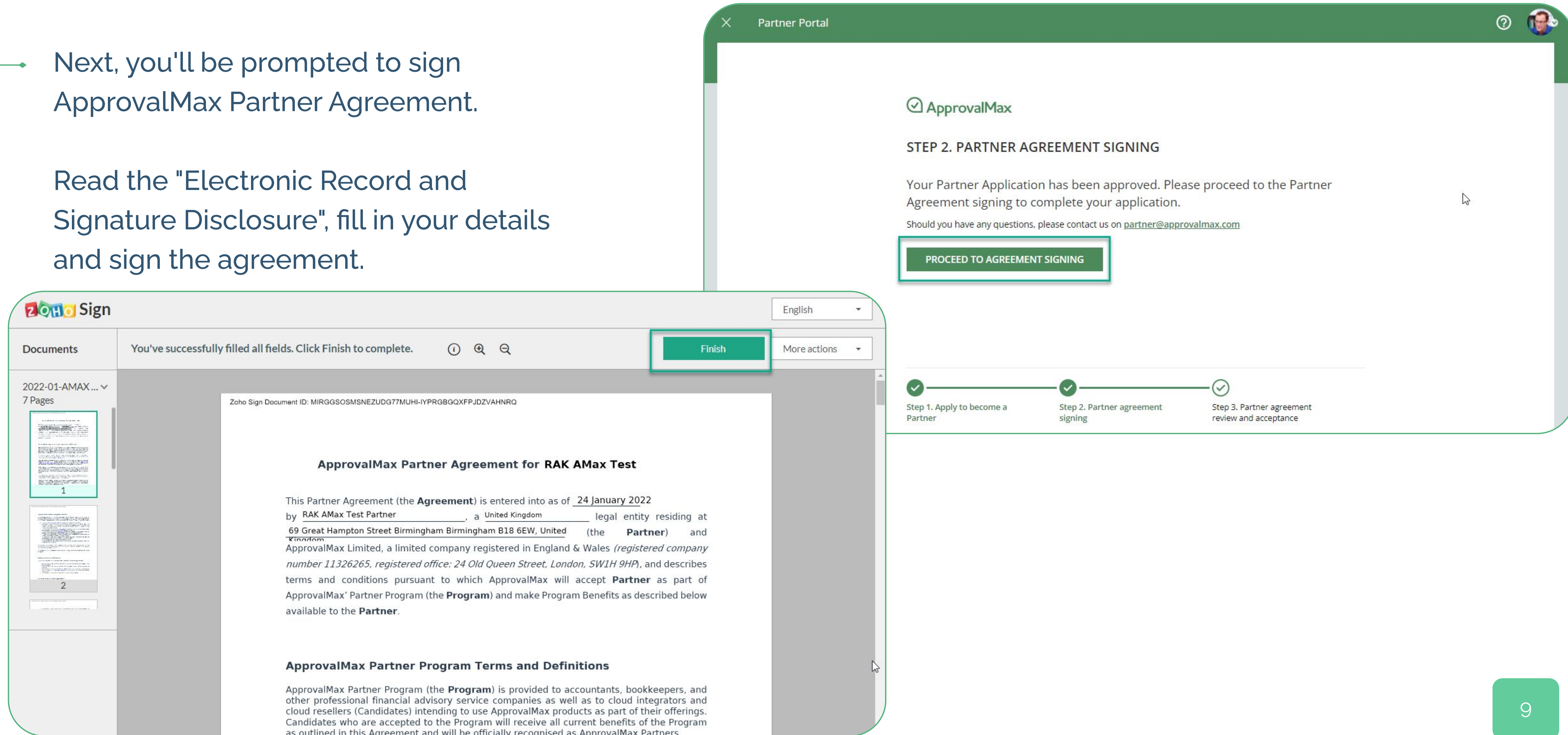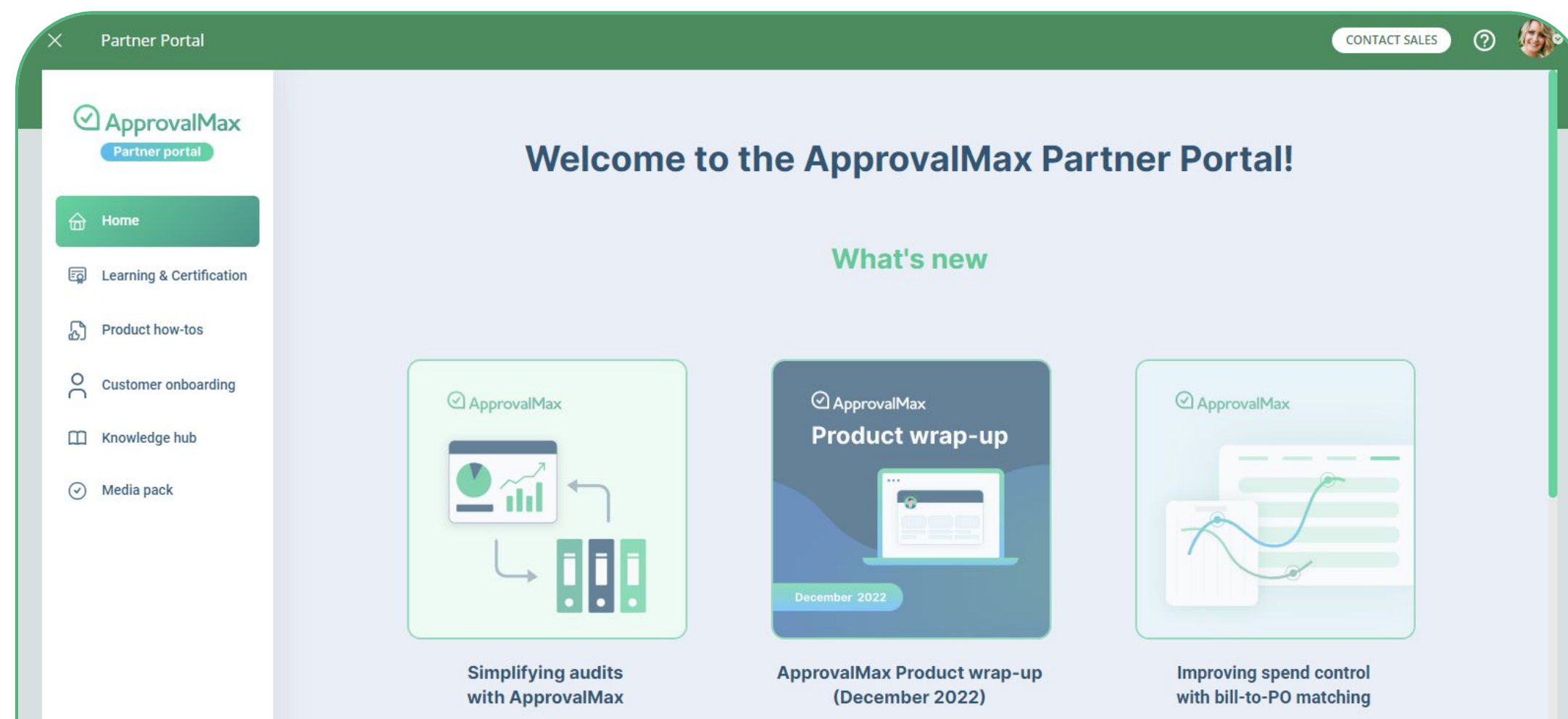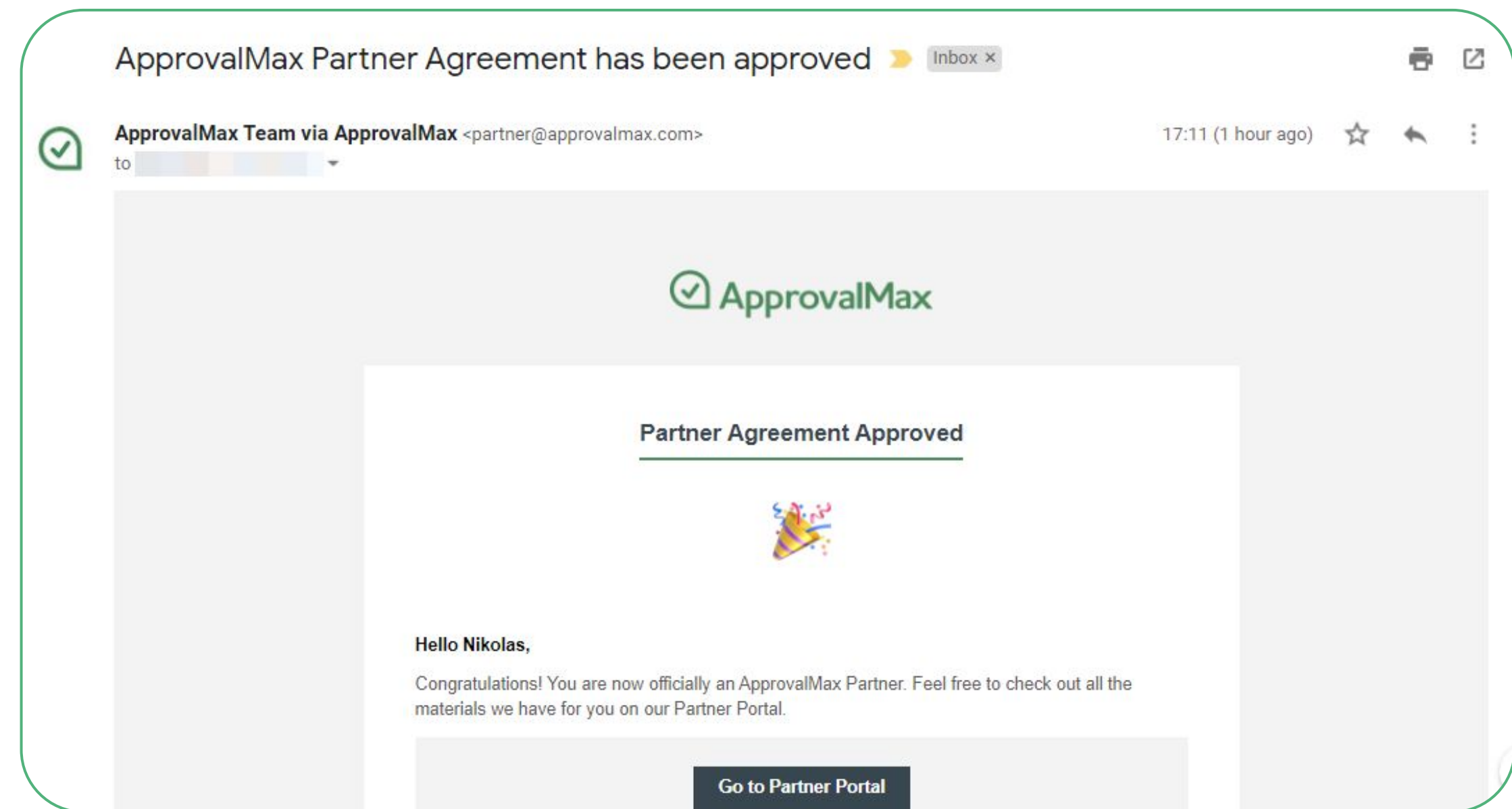
Partner onboarding: Partner status approval

You'll receive a confirmation of your Partner application submission.

ApprovalMax will verify the eligibility of your Partner application and approve the Partner status accordingly.

The confirmation email will be sent to you.
Enjoy the benefits of being a partner!

Practice Staff: introduction

As an ApprovalMax Partner, you'll want your employees to manage your customers' ApprovalMax Organisations and subscriptions. And that's what the feature Practice Staff is for: to appoint Practice Managers, give them access to subscriptions & billing and authorise them to add further Organisations. You can also invite "Members" to Practice Staff and thereby allow them access to the Partner Portal and the certification training.
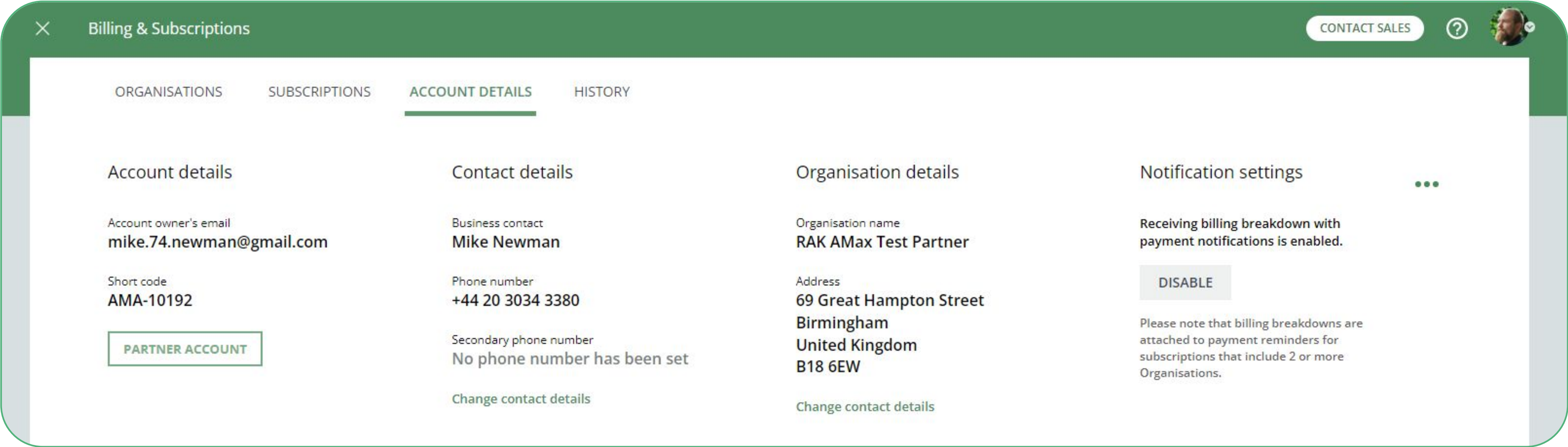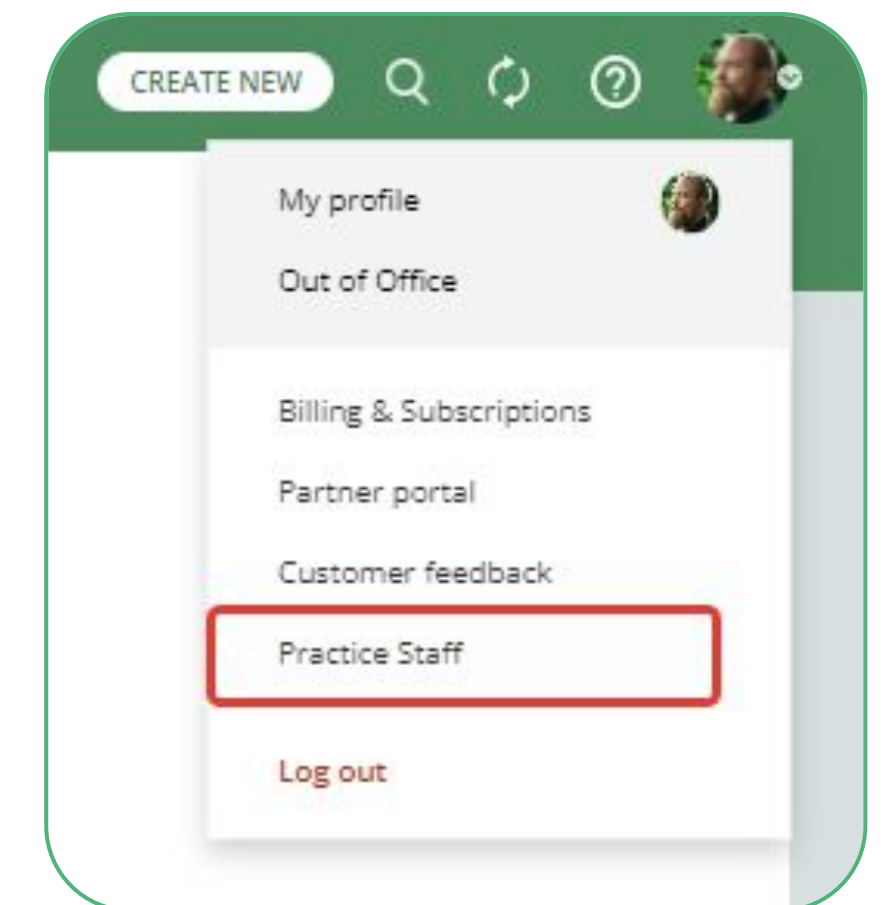
Practice Staff: introduction

The Practice Staff option becomes available to you once your account has been recognised as an ApprovalMax

Partner account, allows the account owner to add users to a Partner account (i.e. business account with approved Partner status) and gives them certain access to Practice staff members, the subscriptions and Organisations management, and the Partner portal for:

- Managing their Practice Staff
- Inviting to certification
- Seeing what Organisations and workflows the users are added to
- Assigning Practice Staff roles to members, managers and user managers

Please note: Users are only able to accept an invitation to a business account if they:

- Do not have their own business account
- Have not been added to any other business account

Practice Staff roles

The roles in Practice Staff are independent and not connected to the user roles in ApprovalMax Organisations.
Practice Staff includes four different user roles:
- Account Owner
- Manager
- User Manager
- Member

By assigning different roles to team members, accounting and bookkeeping firms can ensure that each team member has access to the appropriate level of information and functionality within the ApprovalMax Practice Staff. This can help improve efficiency and streamline the client management process.

Practice Staff roles: Account Owner

Is a registered person who created an account. They can apply for Partner status, have access to the Partner Portal and Practice staff, invite users and assign their role, send out invitations to certifications, add new/delete/retire Organisations and manage subscriptions. The Account Owner should be the main Partner account, i.e. the business account that manages your customer subscriptions and the connected Organisations. The role of account owner is automatically assigned and cannot be changed or given to any other user.

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Practice Staff roles: Manager

Has almost the same authorities as account owner: has access to Partner portal, can invite members to a Practice staff and Partner certification and see their certification status, purchase subscriptions, create new Organisations, assign Organisation to subscriptions etc

Managers cannot:

- Add new managers and assign account roles
- Cancel an account
- Apply for Partner status (as it is only possible to be a part of one business account)
- Remove users from Practice staff

Practice Staff Managers can check which user has been added to which Organisation, and whether this user is part of any workflow.
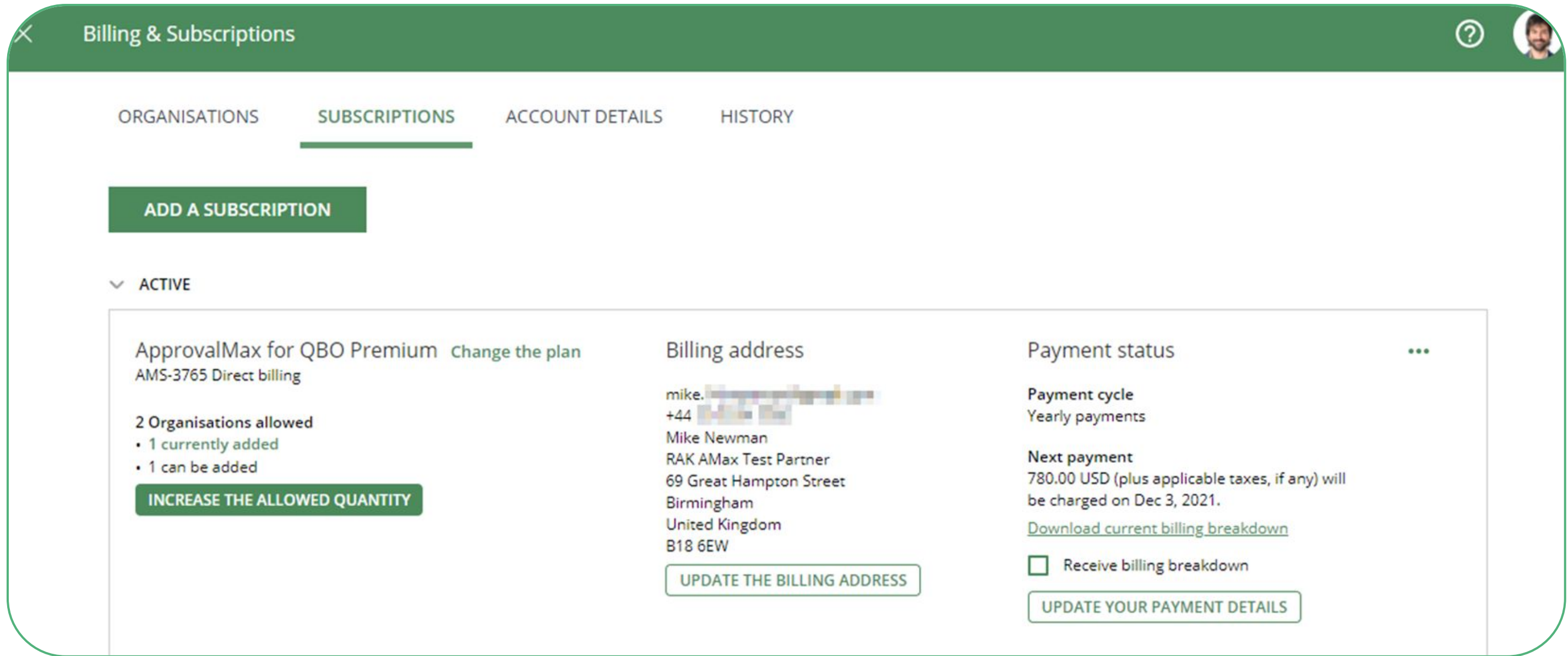
Practice Staff roles: Manager

Practice Staff Managers have access to Billing & Subscriptions and are able to perform changes such as:

- Adding and removing Organisations
- Changing the number of Organisations for a subscription
- Adding and removing subscriptions

It is not possible for a Manager to change the account details, or to cancel the account.

This enables Managers to take care of Organisations and subscriptions instead of the Account Owner.
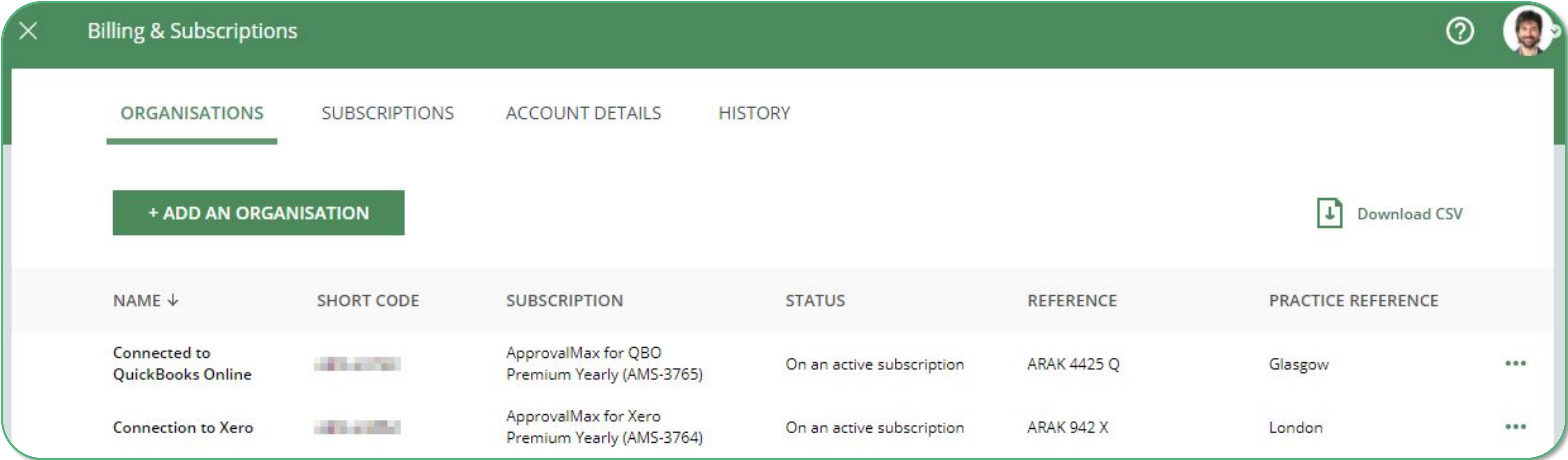
Practice Staff roles: User Manager

Performs the same functions as the Manager.

However, is not able to delete Organisations and doesn't have access to Billing and Subscriptions.

Such user can manage users access to the Organisations and Practice Staff.

Practice Staff roles: Member

Is the standard role in Practice Staff and applies once a user has accepted an invitation.

Users with the Member role are allowed access to the ApprovalMax Partner Portal and all the Partner-related resources through the product. They can also take part in the ApprovalMax Partner certification.

Apart from receiving standard invitations to customer Organisations, users with the Practice Staff Member role can be appointed as an ApprovalMax Administrator for customer Organisations by the Account Owner, Practice Staff Manager or User Manager.
Such an assignment can be done even if the Practice Staff Account Owner, Practice Staff Manager or User Manager is not an Administrator of that customer Organisation.

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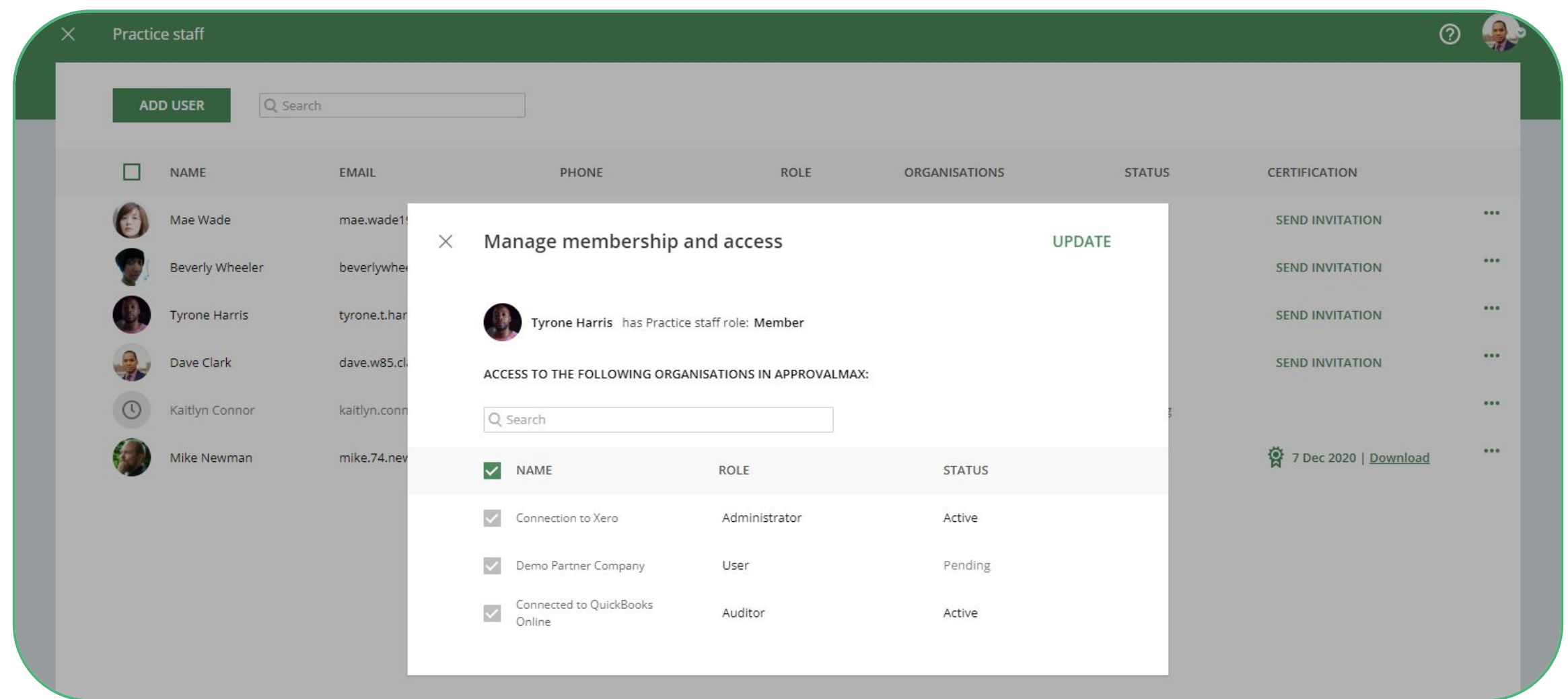
Practice staff: How to invite a user to "Practice staff"
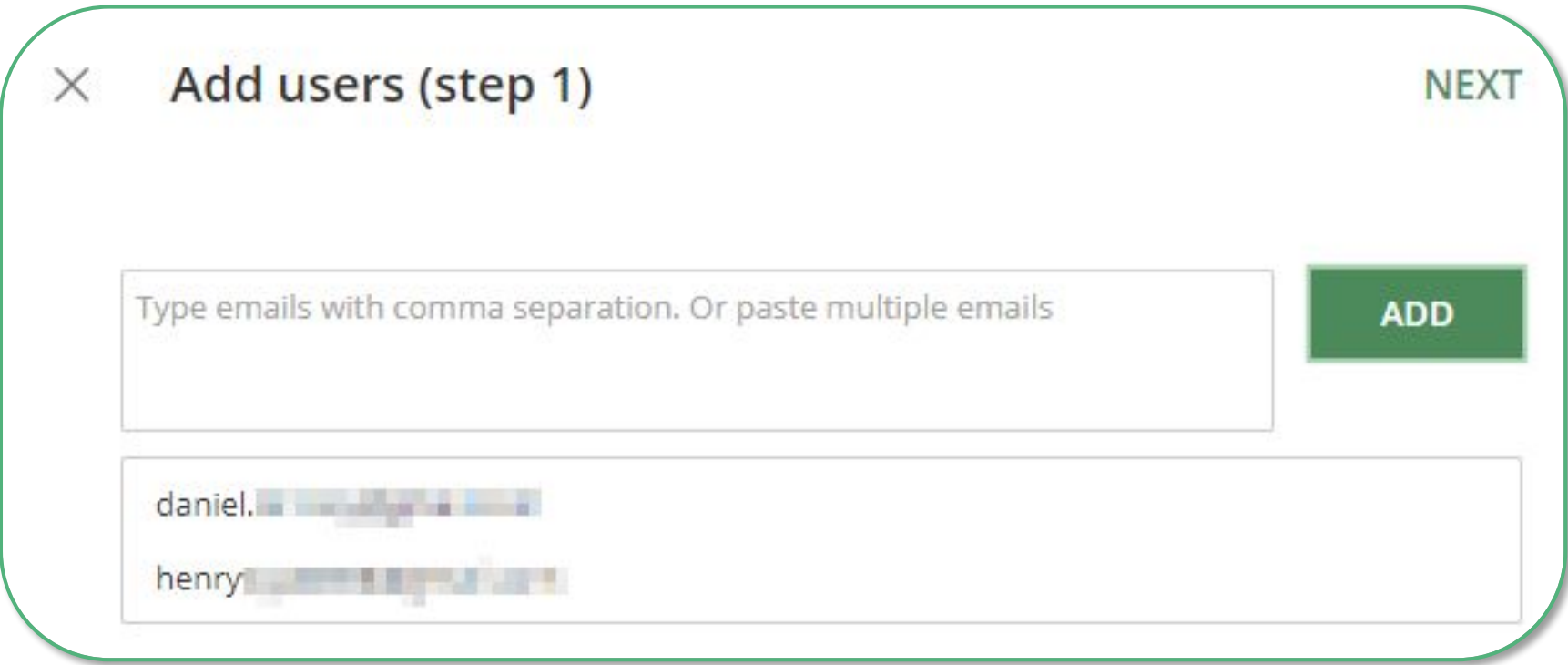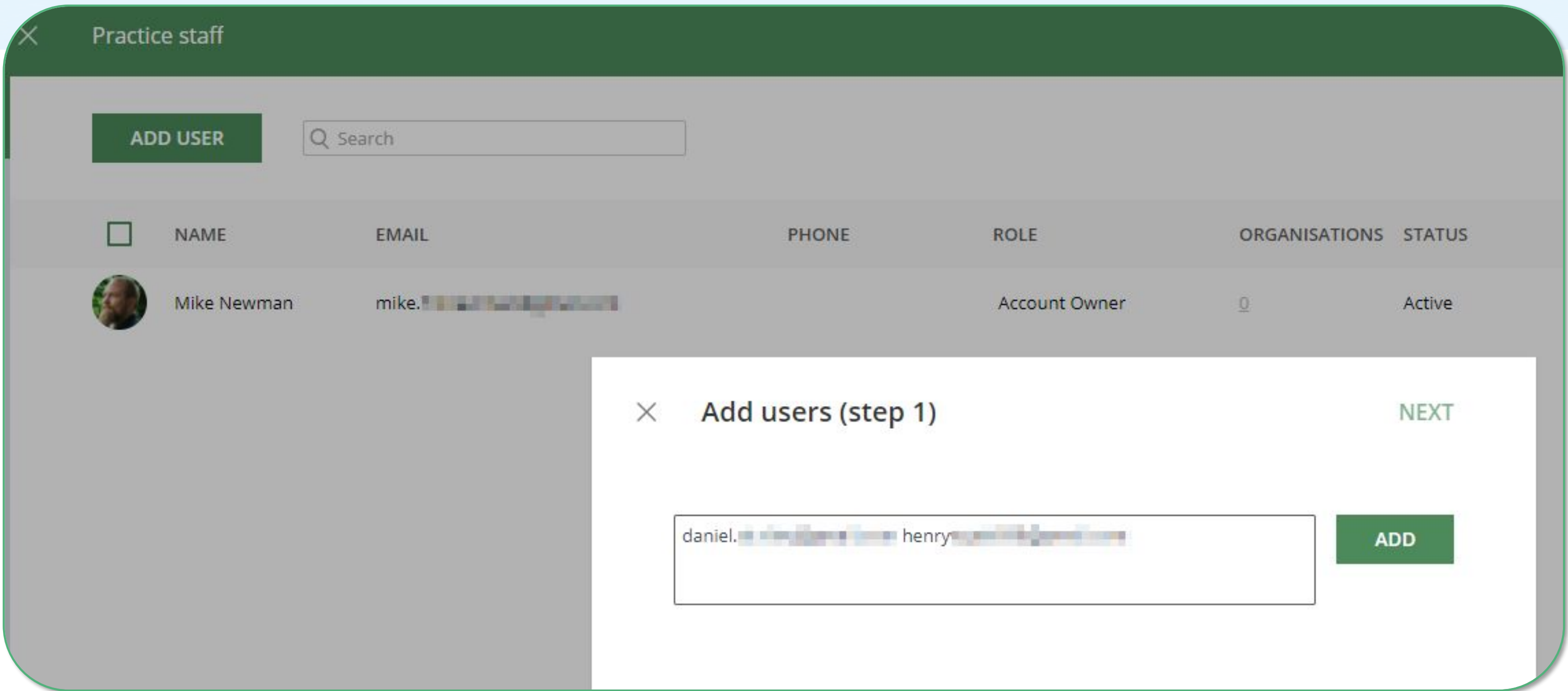
Account owners and Managers can easily onboard users to a Practice Staff. Simply add users on the Practice Staff page under your Avatar.

Click on the "ADD USER" button and enter the email addresses of the respective employees. You can separate multiple email addresses with a comma or white space, or just paste a list of addresses. Then click on "ADD", and "NEXT".
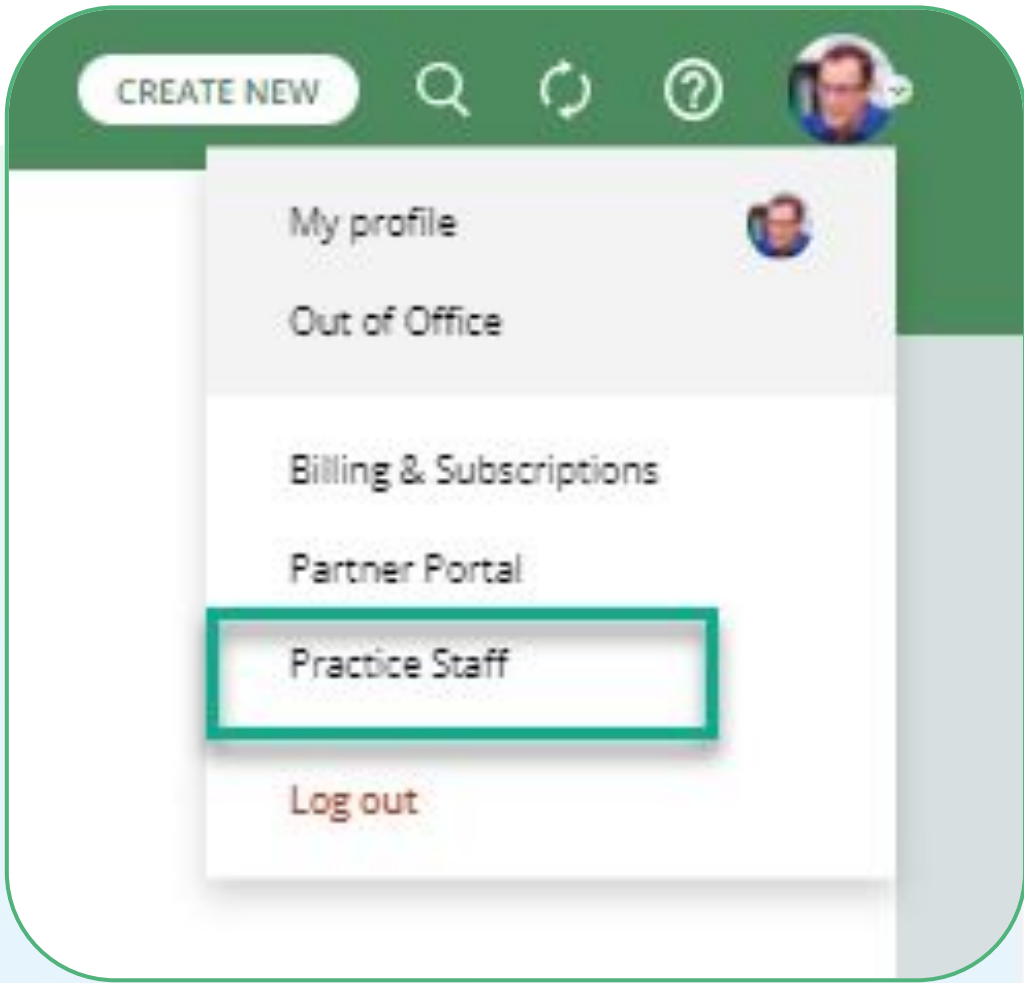
Practice staff: How to invite a user to "Practice staff"

Type in a short text to inform about the purpose of this invitation.

Then click on "ADD USERS" to send out the invitation.

Add users (step 2)   GO BACK   ADD USERS

Please add an invitation text:

Please join ApprovalMax practice staff for managing our customers' approval organisations.

Practice staff   CONTACT SALES ?

ADD USER   Q Search

|	NAME	EMAIL	PHONE	ROLE	ORGANISATIONS	STATUS	CERTIFICATION	
	Mae Wade	mae.wade1992@gmail.com		Manager	0	Active	SEND INVITATION	...
	Beverly Wheeler	beverlywheeler0679@gmail.com		Manager	0	Active	SEND INVITATION	...
	Tyrone Harris	tyrone.t.harris.87@gmail.com		Manager	0	Active	SEND INVITATION	...
	Dave Clark	dave.w85.clark@gmail.com		User Manager	1	Active	SEND INVITATION	...
	Kaitlyn Connor	kaitlyn.connor87@gmail.com		Member		Pending		...
	Mike Newman	mike.74.newman@gmail.com		Account Owner	3	Active	7 Dec 2020 | Download	...

Practice staff: How to invite a user to "Practice staff"

Invited users will receive the invitation by email as well as a notification in the product.

When the invitee has accepted the invitation, their status changes to "Active".

By default, the Member role is assigned in the Practice Staff list.
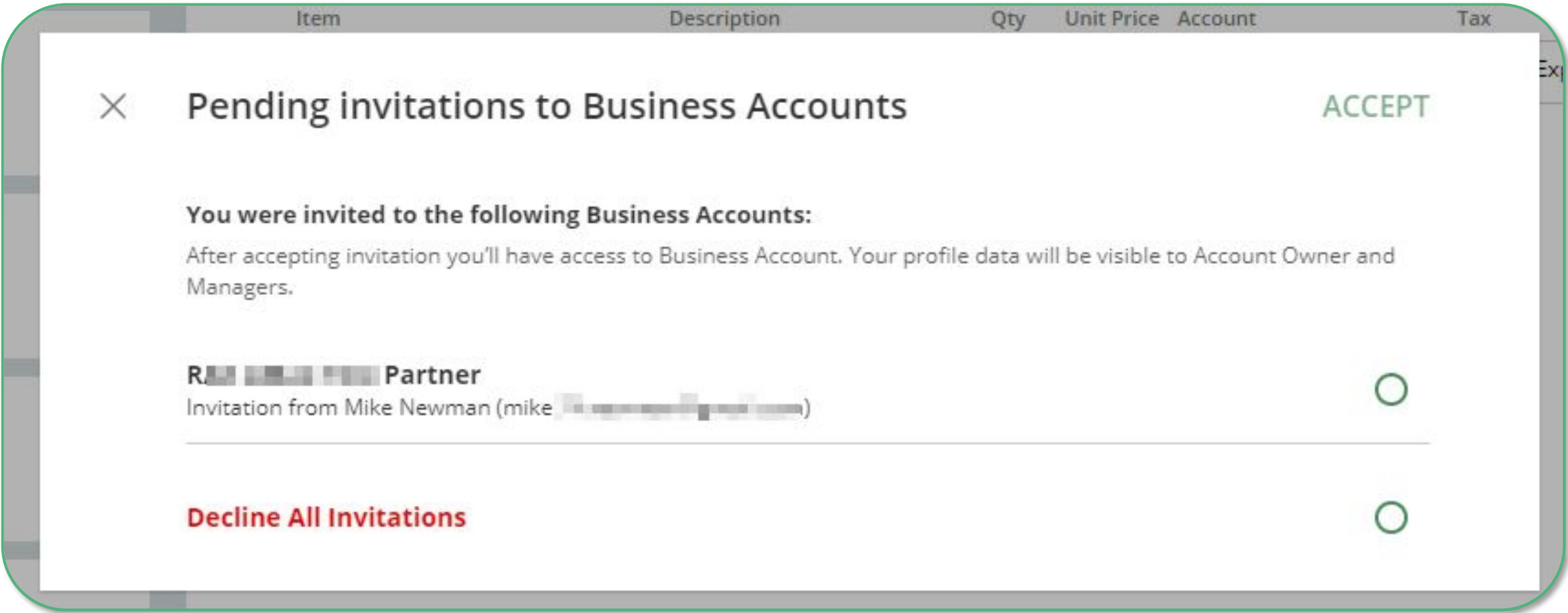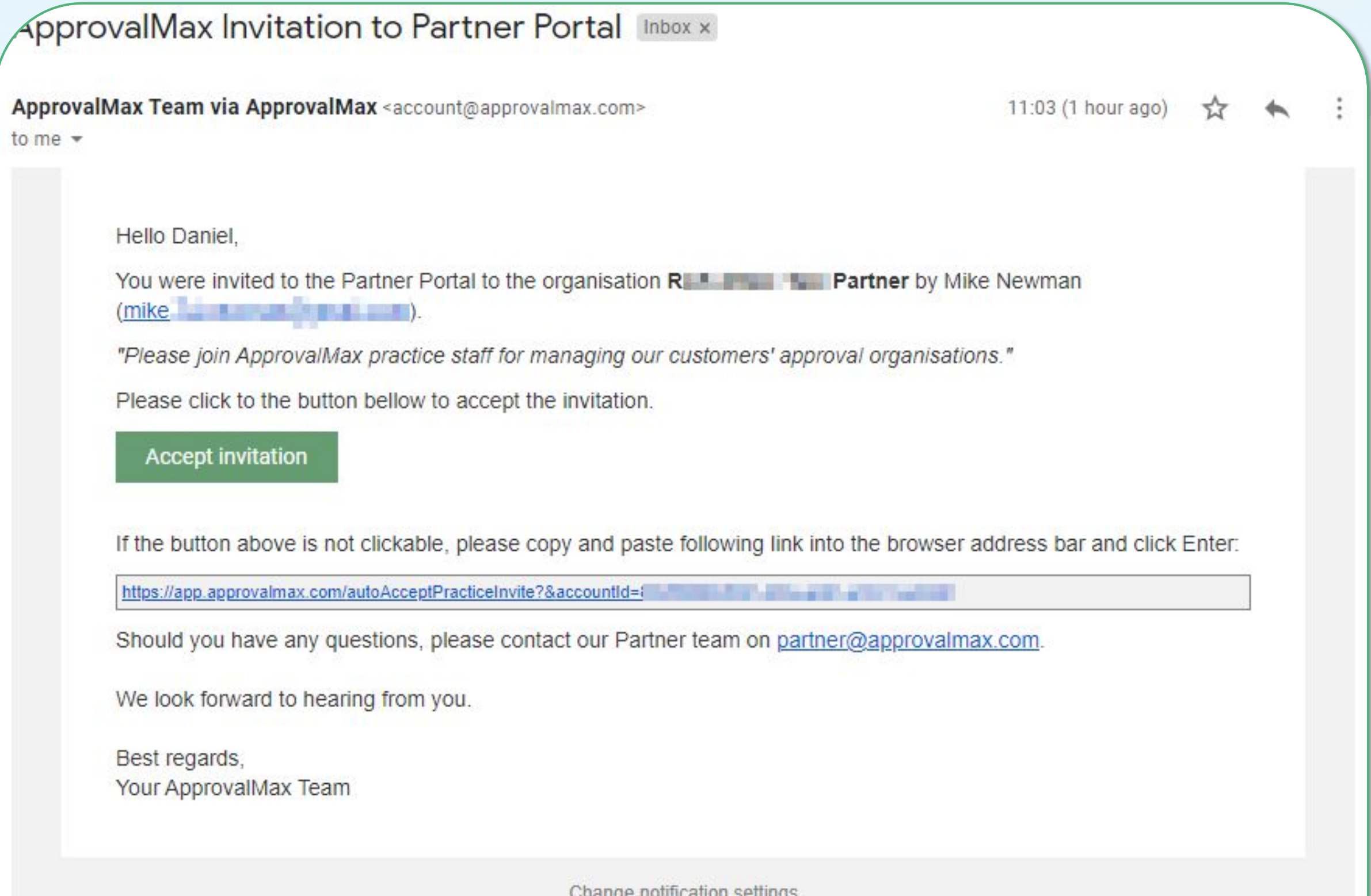
Practice staff: How to remove a user from Practice staff

Only Account owner has the authority to remove users from Practice staff.

Hover over the user name or tick the checkbox next to the respective user and then click on the ⋯ button.
Next, select "Remove from Practice staff":

If the user you want to remove has been added to Organisations in this business account or participates in workflows with any role (Requester, Approver, Reviewer, external submitter), the system will display the name of those Organisations (and workflows) and ask the account owner to confirm the removal of that user.

Practice staff: Certification management

In the "Practice staff" section, the account owner/manager/user manager can view a user's certification status and download their certificate if the user has accepted an invitation.

If a user has not yet completed certification, you can invite them to do so by clicking on "SEND INVITATION".

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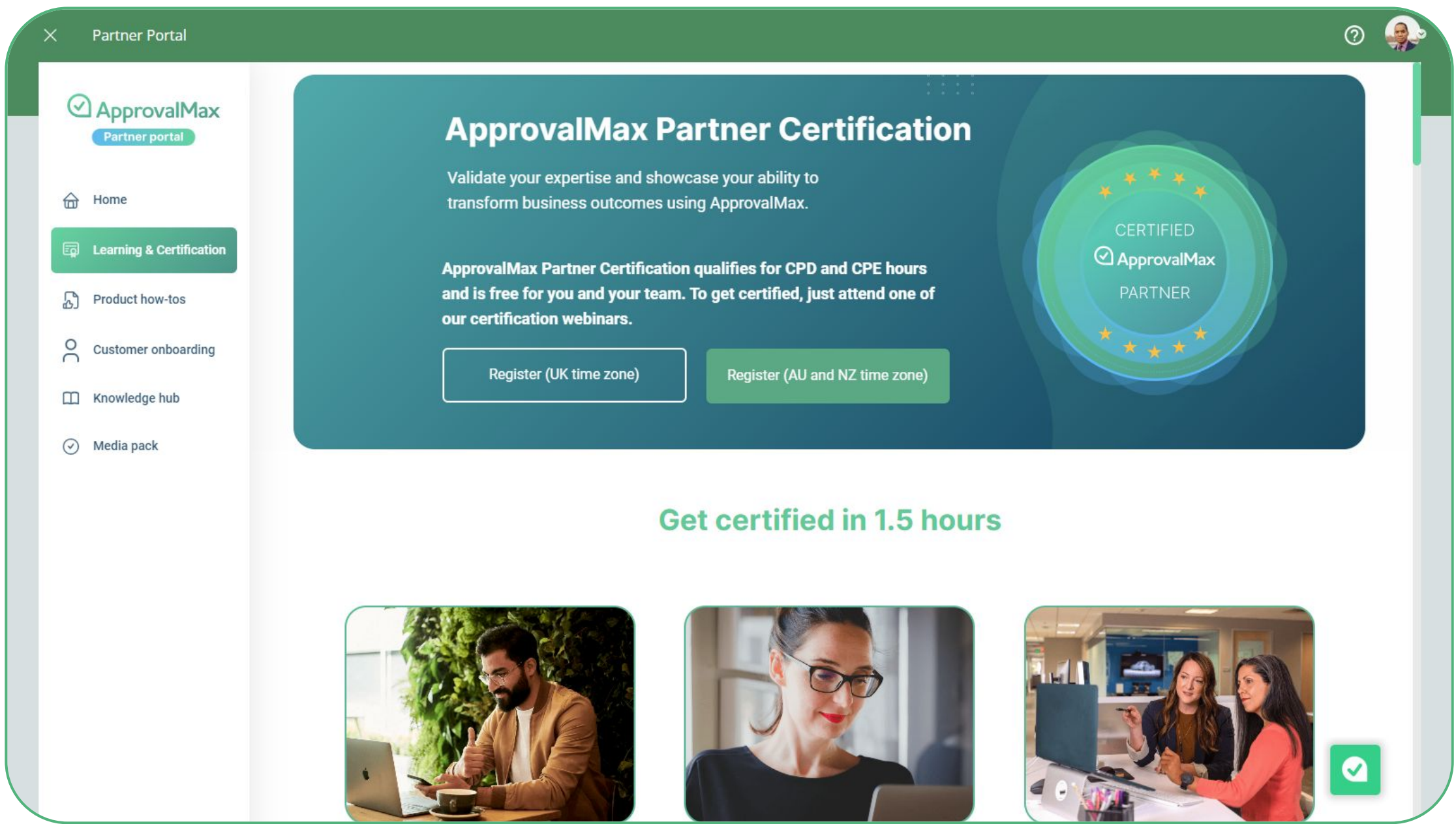
Apply for a Partner status with Xero Practice Manager (XPM)

ApprovalMax allows you to apply for a Partner status right away after connecting your ApprovalMax account to Xero Practice Staff Manager. Just click on **CONNECT TO XERO PRACTICE MANAGER**, verify your access to XPM and enjoy being a Partner of ApprovalMax.

With connection to XPM you will be able to:

- Sync Staff members and Clients from Xero HQ to ApprovalMax

- Add members to a Practice Staff and see their Origin

- Remove users from Practice Staff and see if a user was removed in Xero HQ
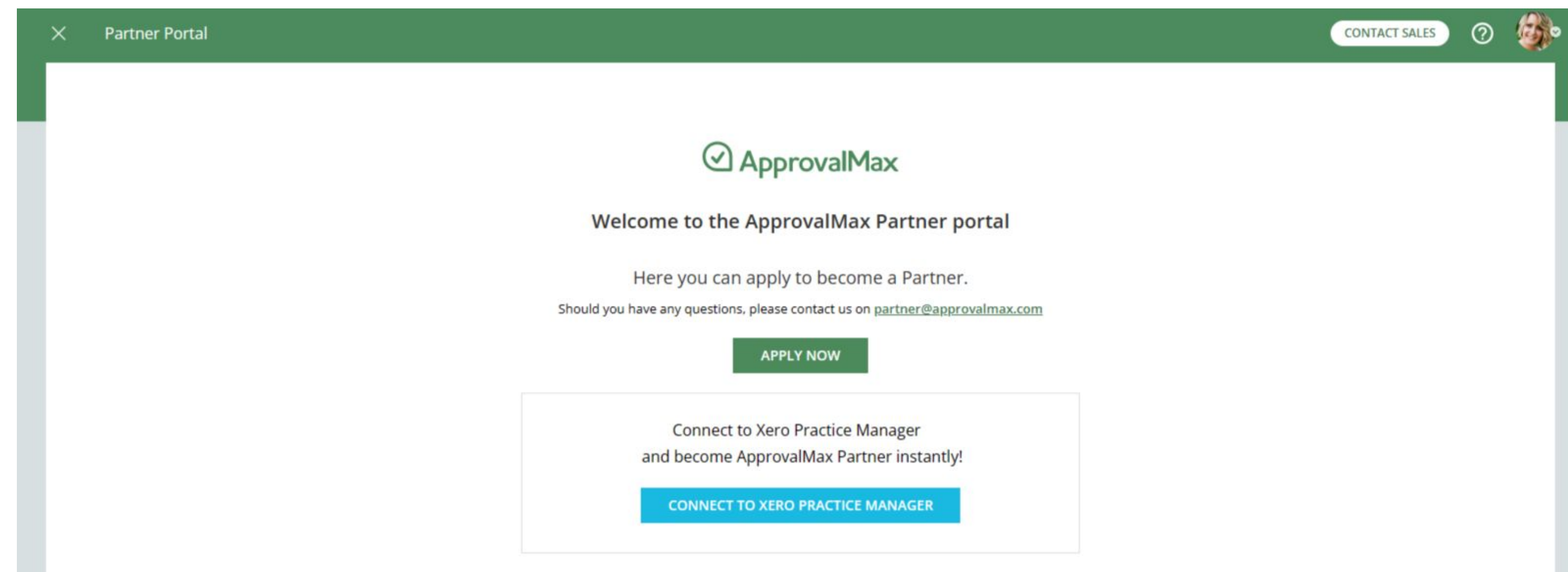
Xero Practice Manager

This feature allows for Partners to pull data from Xero HQ (Staff Members, Clients) and add them to their Practice Staff in ApprovalMax.

Who can pull data from Xero HQ? The Account Owner and Managers (users added with the role of Practice Staff Manager) of the Practice Staff has access to the synchronisation with Xero HQ. If the users are already added to the Practice Staff, they appear greyed out.

Invitation to Practice Staff Xero HQ Staff Members can't be added without invitation – selected user is invited right away if one isn't already a part of other Account. User can be added as Manager/Member only to one Practice Staff

Removing users from Practice Staff
Account Owner/Practice Staff Manager can remove a user from the Practice Staff.
If a user is removed from XPM, this is visible in the Practice Staff page.

CONNECT TO XPM

✕ Sync users with Xero HQ   SYNC NOW

🔍 Search Name...

	NAME	EMAIL	ROLE	STATUS
☐	Henry Wyatt	some@email.com	Account owner ⌃	Active
☐	Nikolas Frost	some@email.com	User	Active
☑	Evan Parker	some@email.com	User	Active
☑	Oliver Greyson	some@email.com	User	Active
☑	Luke Peyton	some@email.com	User	Active
☑	Lucy Gavin	some@email.com	User	Already added

✕ Practice staff   ?

ADD NEW USER   🔍 Search Name and Organisation...   Connected to HQ ⌄   ✓ Certified Partner

	NAME	EMAIL	PHONE	ROLE	ORGANISATIONS	STATUS	ORIGIN	CERTIFICATION
☐	Henry Wyatt	some@email.com	+3 488 774-44-55	Account owner ⌃	5	Active	ApprovalMax	🏅 12.12.2020 | Download
	Nikolas Frost	some@email.com	+3 488 774-44-55	Account Manager	5	Active	ApprovalMax	🏅 12.12.2020 | Download
	Evan Parker	some@email.com	+3 488 774-44-55	Member	5	Active	ApprovalMax	SEND INVITATION
	Oliver Greyson	some@email.com	+3 488 774-44-55	Member	5	Active	Xero HQ (removed)	🏅 12.12.2020 | Download
	Luke Peyton	some@email.com	+3 488 774-44-55	Member	5	Active	Xero HQ	🏅 12.12.2020 | Download

If you have questions, please review our **Knowledge Base** or fill in the **form**

For Support questions, please contact us