



September 2023

Requester Guide for NetSuite

Cloud Approval Workflows for Finance and Accounting

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- Change your user name, password, contact details, notification and security settings
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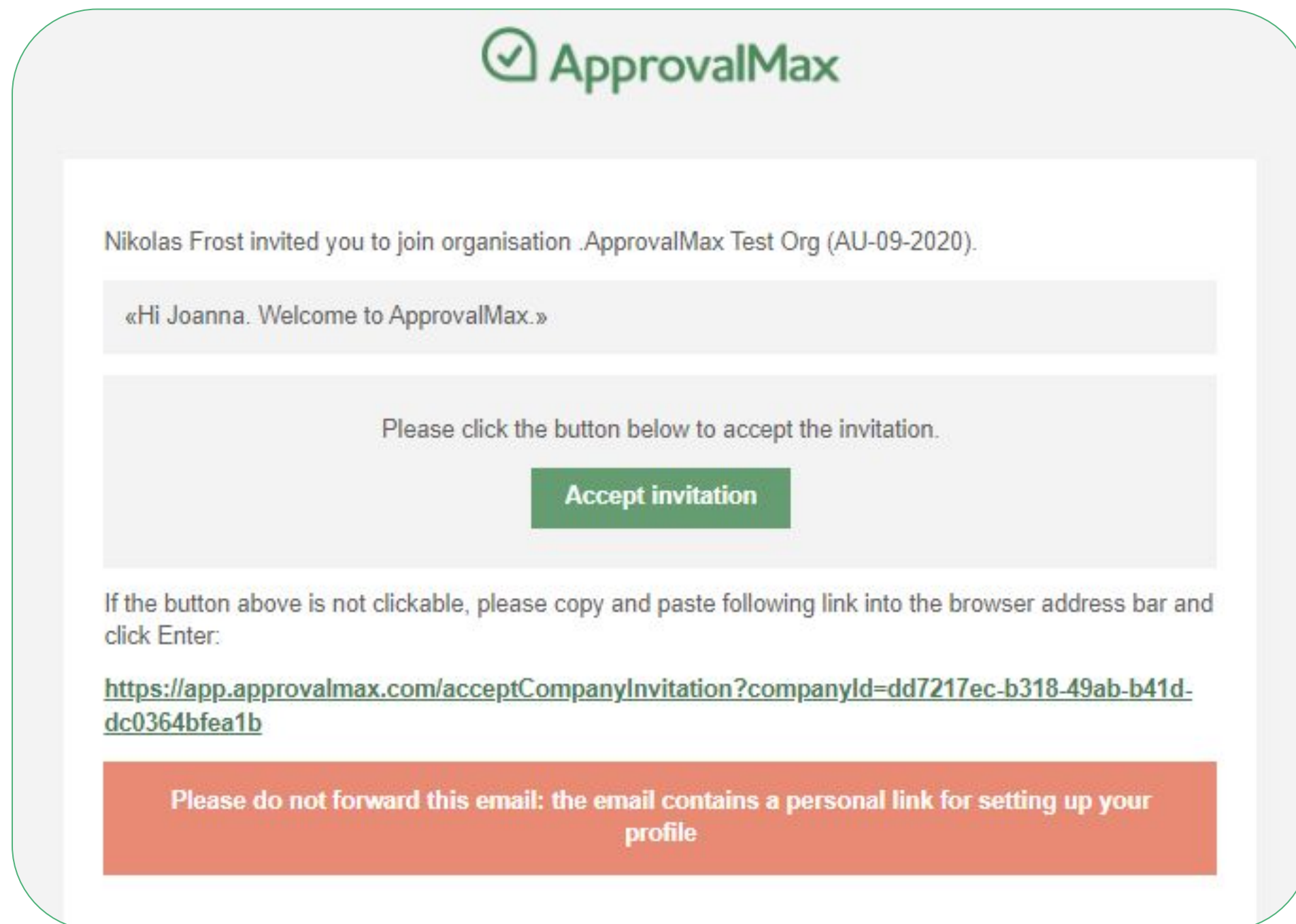
Working with ApprovalMax

- Create a new Purchase Order or Bill
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Accept an invitation

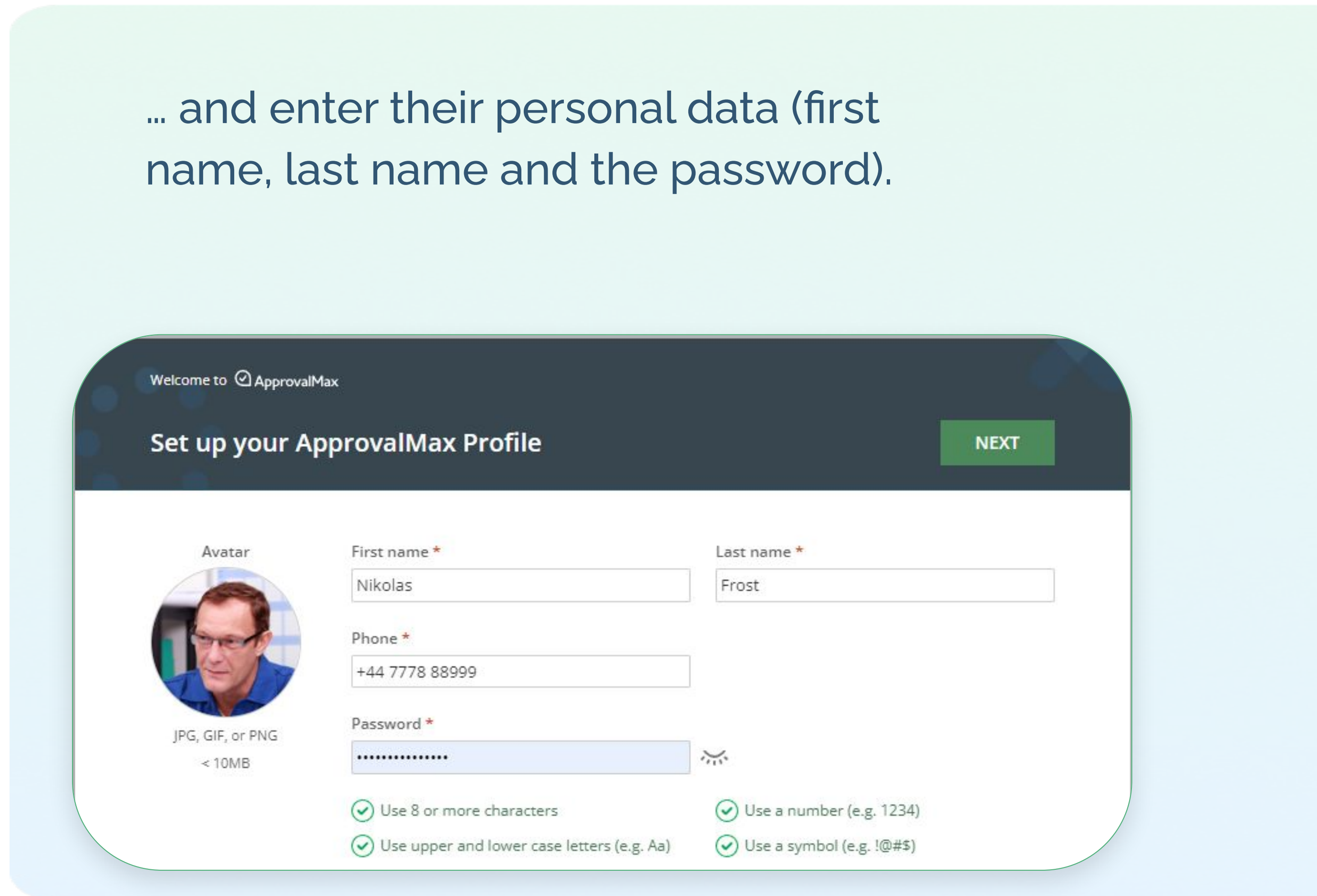
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All invited users need to accept the invitation to join an Organisation



The screenshot shows an email 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 another grey box with the instruction: "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, an orange box contains the warning: "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).

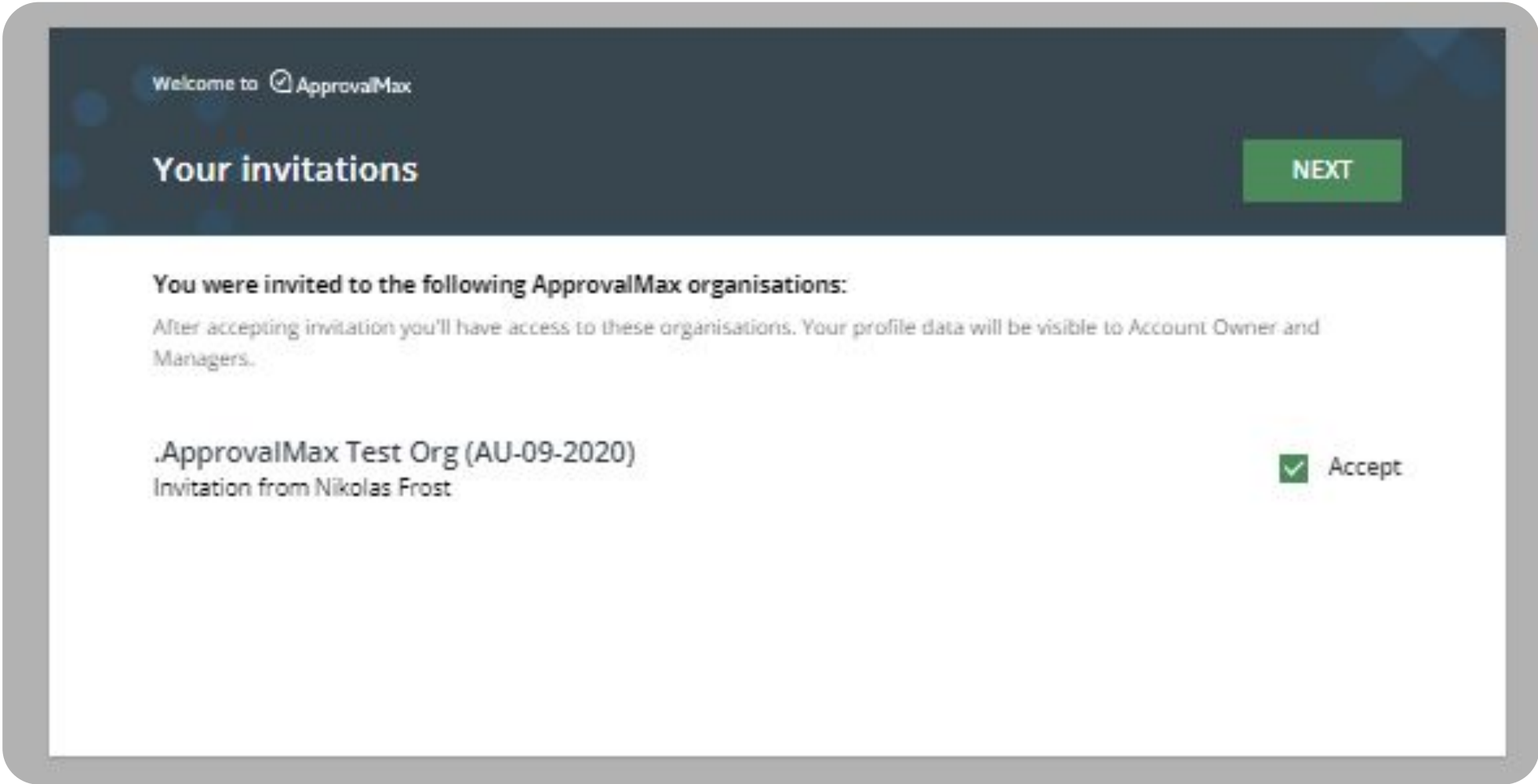


The screenshot shows a web form titled "Set up your ApprovalMax Profile" with a "NEXT" button in the top right. The form includes an "Avatar" section with a circular image of a man and the text "JPG, GIF, or PNG" and "< 10MB". To the right are input fields for "First name *" (containing "Nikolas"), "Last name *" (containing "Frost"), "Phone *" (containing "+44 7778 88999"), and "Password *". The password field is masked with dots and has an eye icon to toggle visibility. Below the password field 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

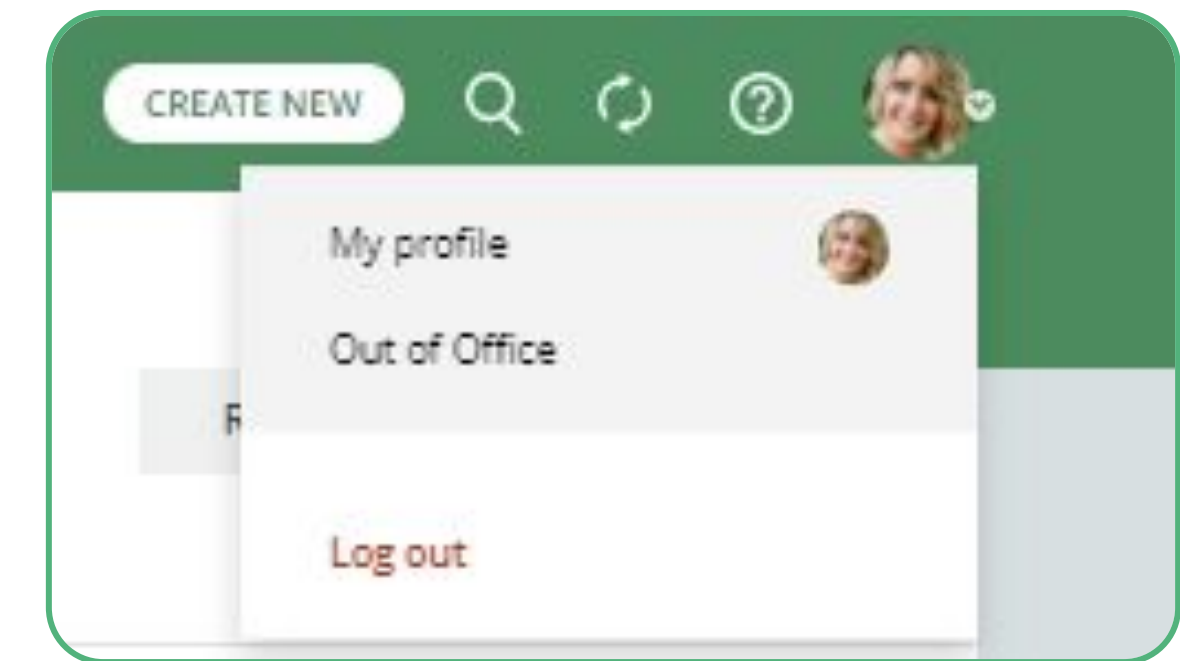
2

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

Click on the avatar icon in the top right-hand corner of the main page to open **My Profile**.



Here, you can change your name, password or time zone, upload an avatar and add a phone number any time.

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.

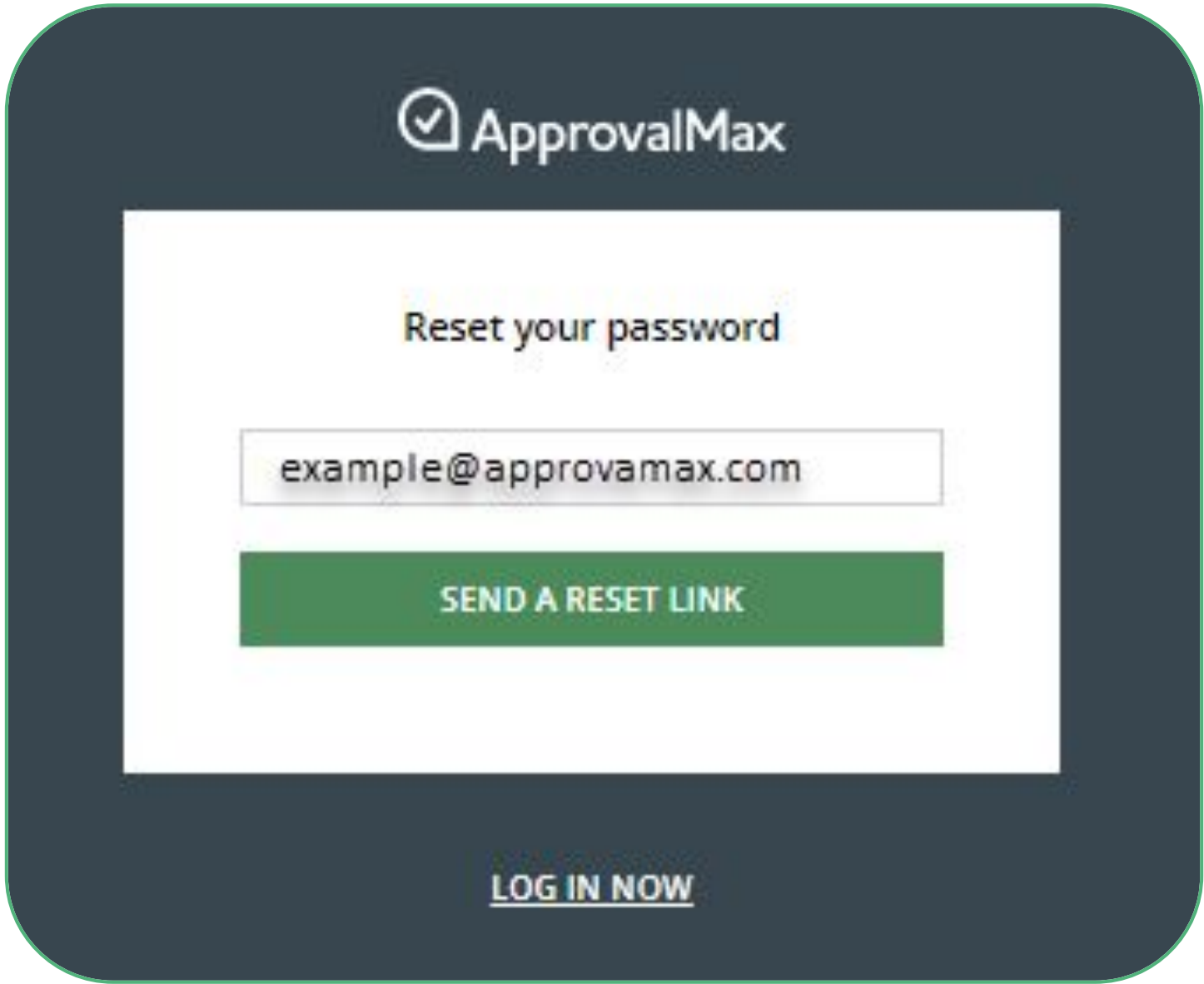
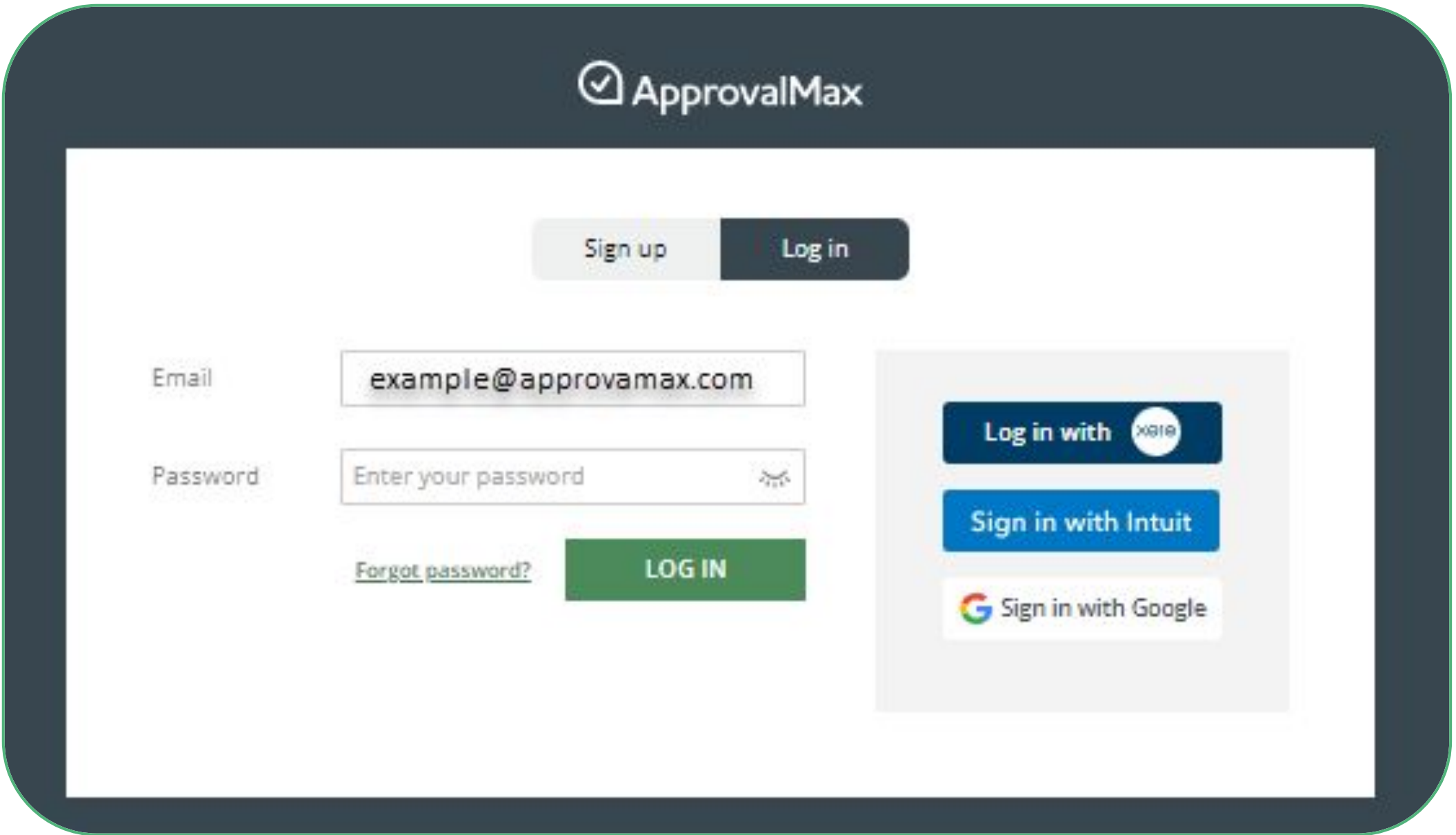
A screenshot of the 'Edit your profile' form. The form has a close button (X) and a 'SAVE' button. It includes an 'Avatar' section with a profile picture. Below this are input fields for 'First name' (Joanna), 'Last name' (Green), 'Email' (joanna.p.green@gmail.com), 'Phone' (+44 20 3034 3380), and 'Time zone' (UTC+00:00 Dublin, Edinburgh, Lisbo...). There are three sections with toggle switches: 'Email notifications' (New requests notifications, Comments notifications, Other notifications, Summary of pending approvals), 'Security' (Log me out after 15 minutes of inactivity, Two-factor authentication), and a 'Send a report every' section with a dropdown menu showing 'Mo', 'Tu', 'We', 'Th', 'Fr', 'Sa', 'Su' and a time '09:00'. At the bottom, there is a link '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.

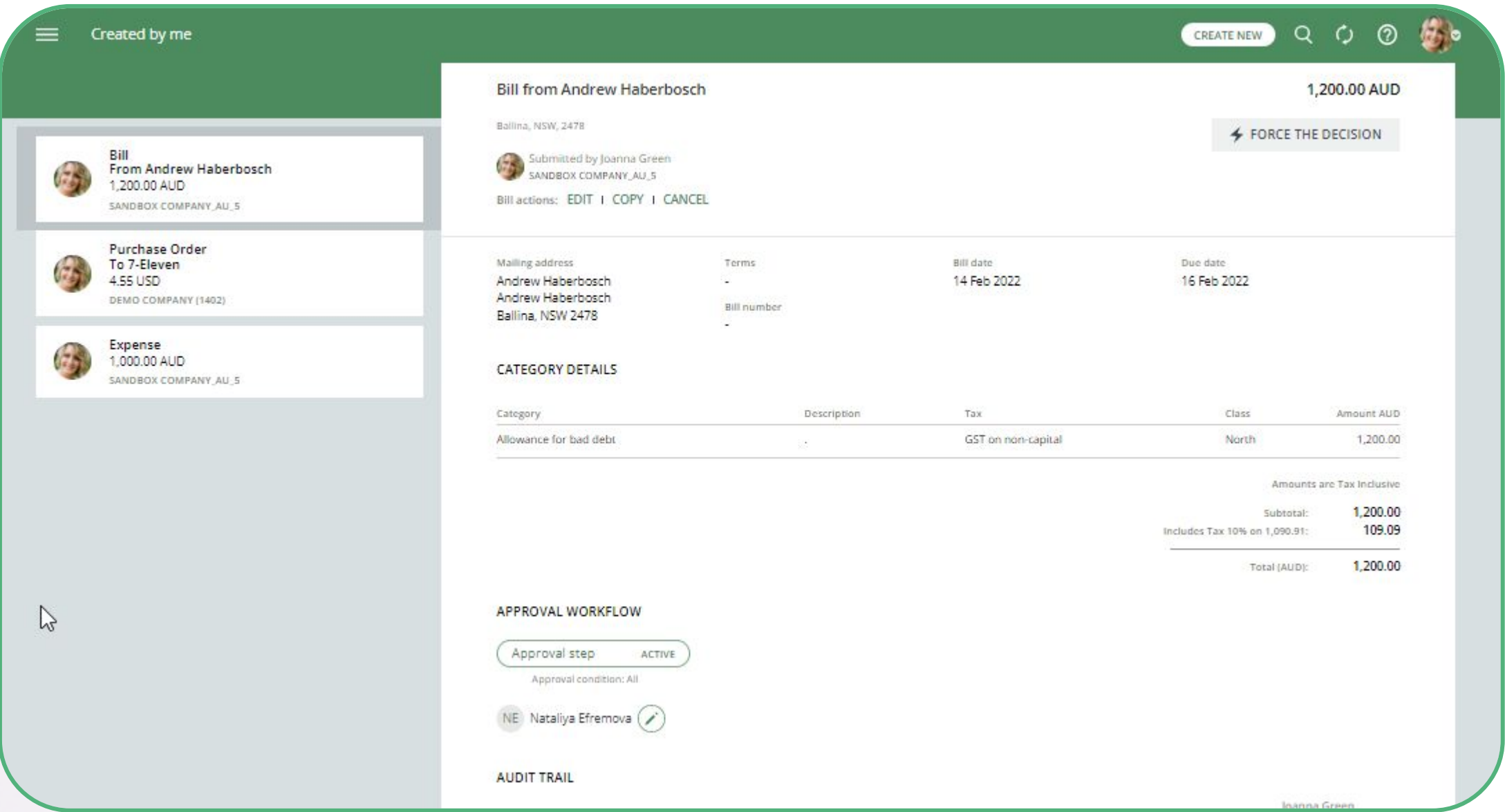
An email will be sent out instantly, it contains a link to **My Profile** where you can set a new password.



Create a new Purchase Order/Vendor Bill

ApprovalMax supports multi-step approval workflows for Purchase Orders and/or Vendor Bills.

- To create a Purchase Order or Bill click on the  button.
- Select **Purchase Order** or **Bill** in the Organisation for which you want to create such a request.
- Fill in all required fields (such as Vendor, Item, Quantity, etc.).
- Click on the **Submit For Approval** button.
- To resubmit a Purchase Order or Bill click on **Edit** and make your changes, then click on **Resubmit For Approval**.
- To copy a Purchase Order or Bill, click on **Copy**, make changes if needed and then click on **Submit For Approval**.
- To cancel a Purchase Order or Bill click on the **Cancel** button.



Created by me

CREATE NEW

Bill from Andrew Haberbosch 1,200.00 AUD

Ballina, NSW, 2478

Submitted by Joanna Green

SANDBOX COMPANY_AU_5

Bill actions: EDIT | COPY | CANCEL

FORCE THE DECISION

Mailing address: Andrew Haberbosch, Andrew Haberbosch, Ballina, NSW 2478

Terms: -

Bill date: 14 Feb 2022

Due date: 16 Feb 2022

BILL number: -

CATEGORY DETAILS

Category	Description	Tax	Class	Amount AUD
Allowance for bad debt		GST on non-capital	North	1,200.00

Amounts are Tax Inclusive

Subtotal: 1,200.00

Includes Tax 10% on 1,090.91: 109.09

Total (AUD): 1,200.00

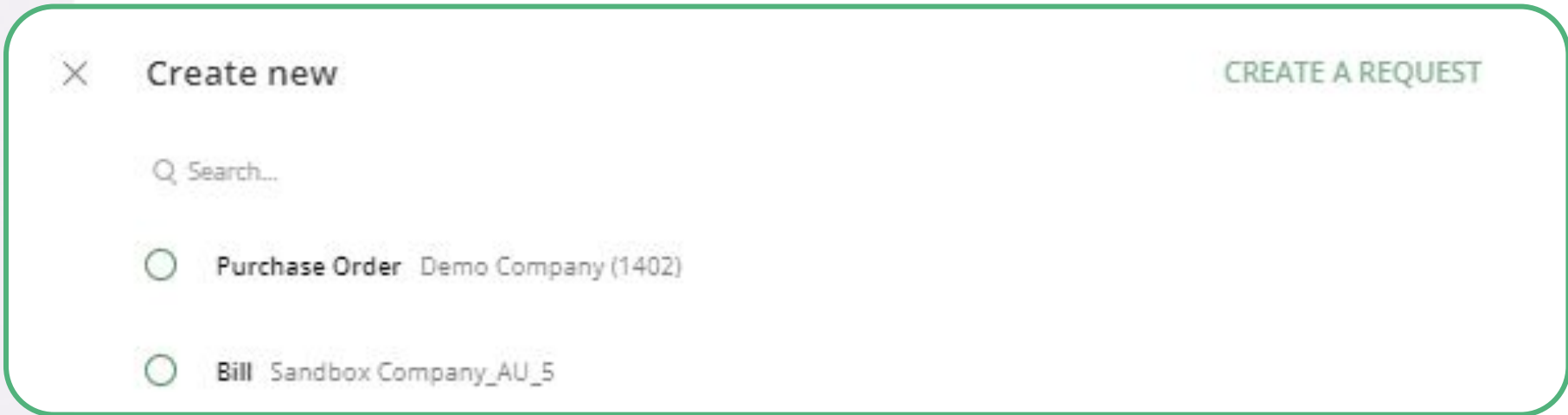
APPROVAL WORKFLOW

Approval step: ACTIVE

Approval condition: All

NE: Nataliya Efremova

AUDIT TRAIL



Close

Create new

CREATE A REQUEST

Search...


Purchase Order Demo Company (1402)

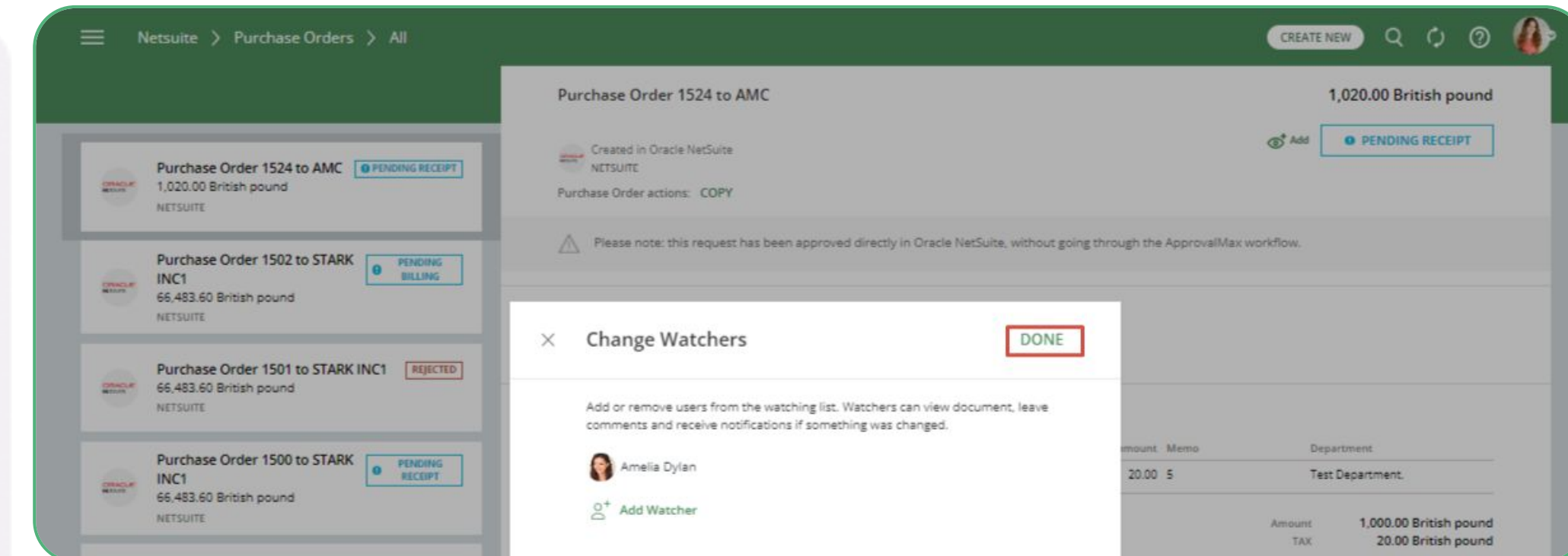
Bill Sandbox Company_AU_5

Add a Watcher

The Watcher functionality in ApprovalMax keeps users with this role informed about specific approval requests within the system so that they can closely monitor them. When a user is assigned as a Watcher to a request, they will receive notifications and updates regarding the progress and status of its approvals, even if they are not directly involved in the authorisation process.

This is how the Requester can add a Watcher:

- In your Organisation, open the request to which you want to add a Watcher.
- Click on the  button
- In the Change Watchers window, click on the “Add Watcher” button and select a Watcher from the list. Then click on “Done”

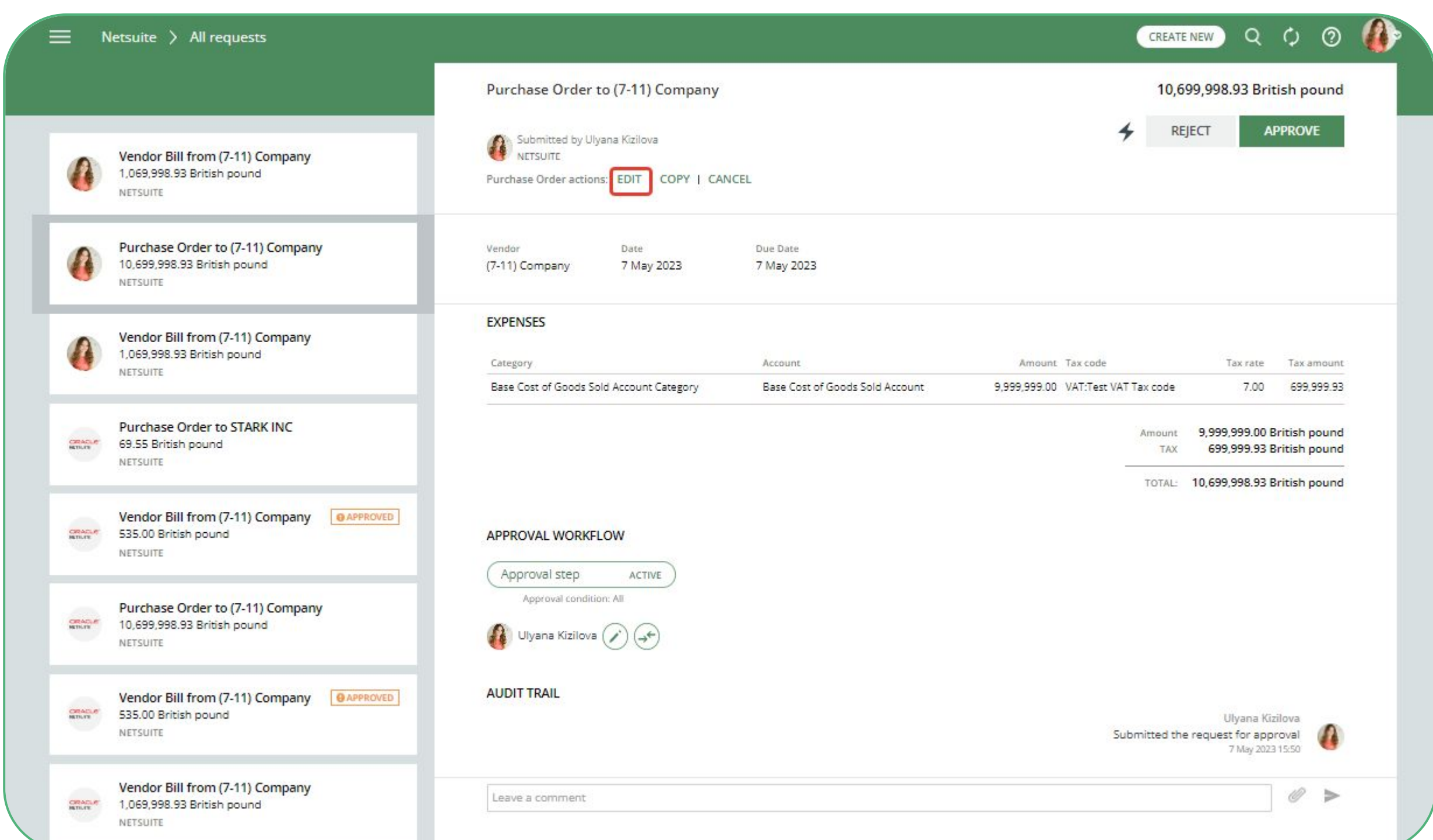


Make changes to a request

Until its final approval, a Purchase Order/Bill or other request created in ApprovalMax can be edited by the Requester in any workflow step.

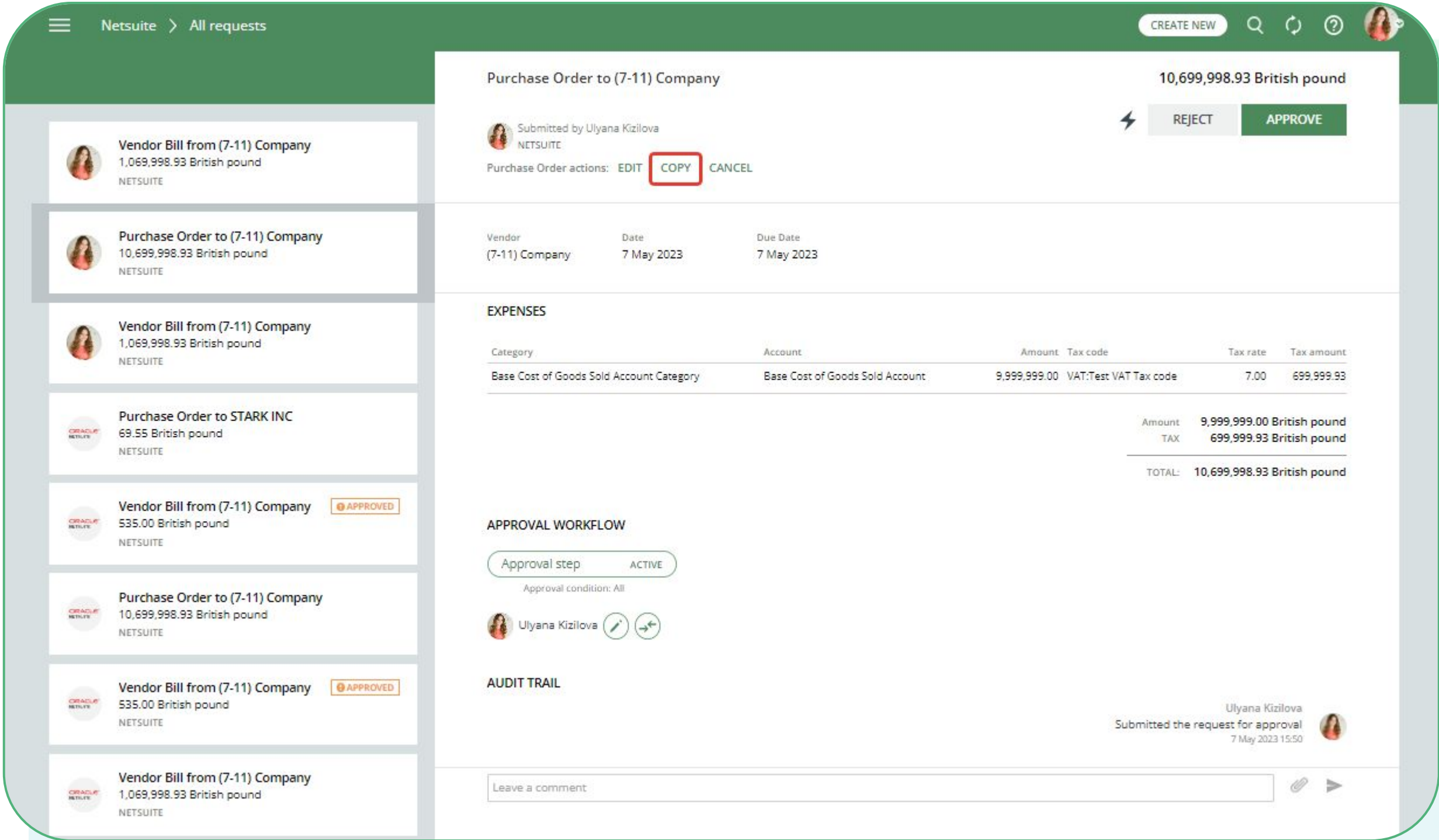
Approvers and Administrators can add comments to a request; Administrators can also restart approval workflows when changes were applied to its approval rules.

It is not possible to alter requests in ApprovalMax after their final approval*. If changes are required at this point, they can only be done in the accounting system.



Copy a request

Existing requests such as Purchase Orders or Bills can be easily copied to speed up and simplify the process of creation.

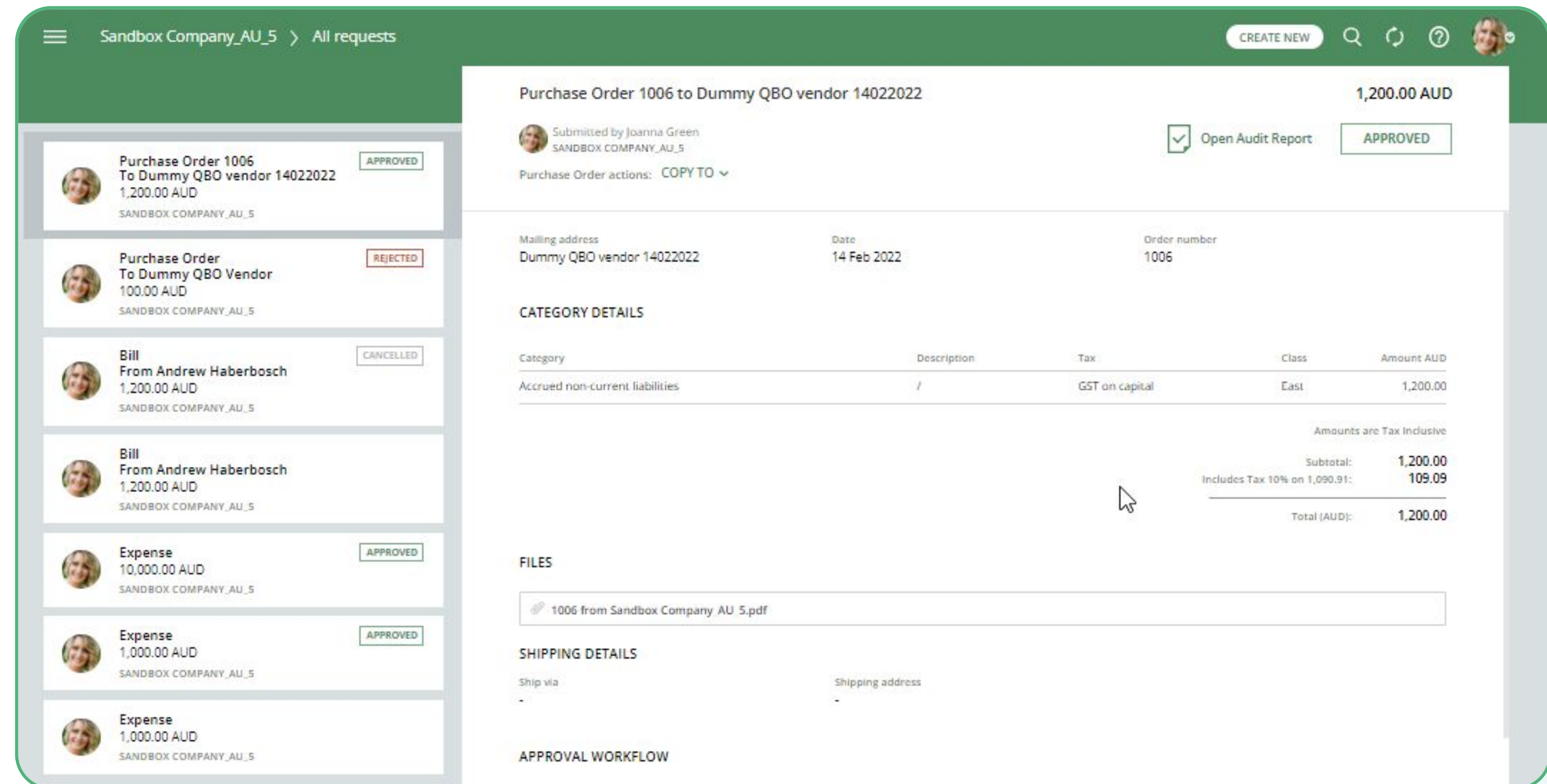


Check the request status

In the **Created By Me** folder, Requesters find all their pending requests.

Drafted requests are in the **Drafts** folder.

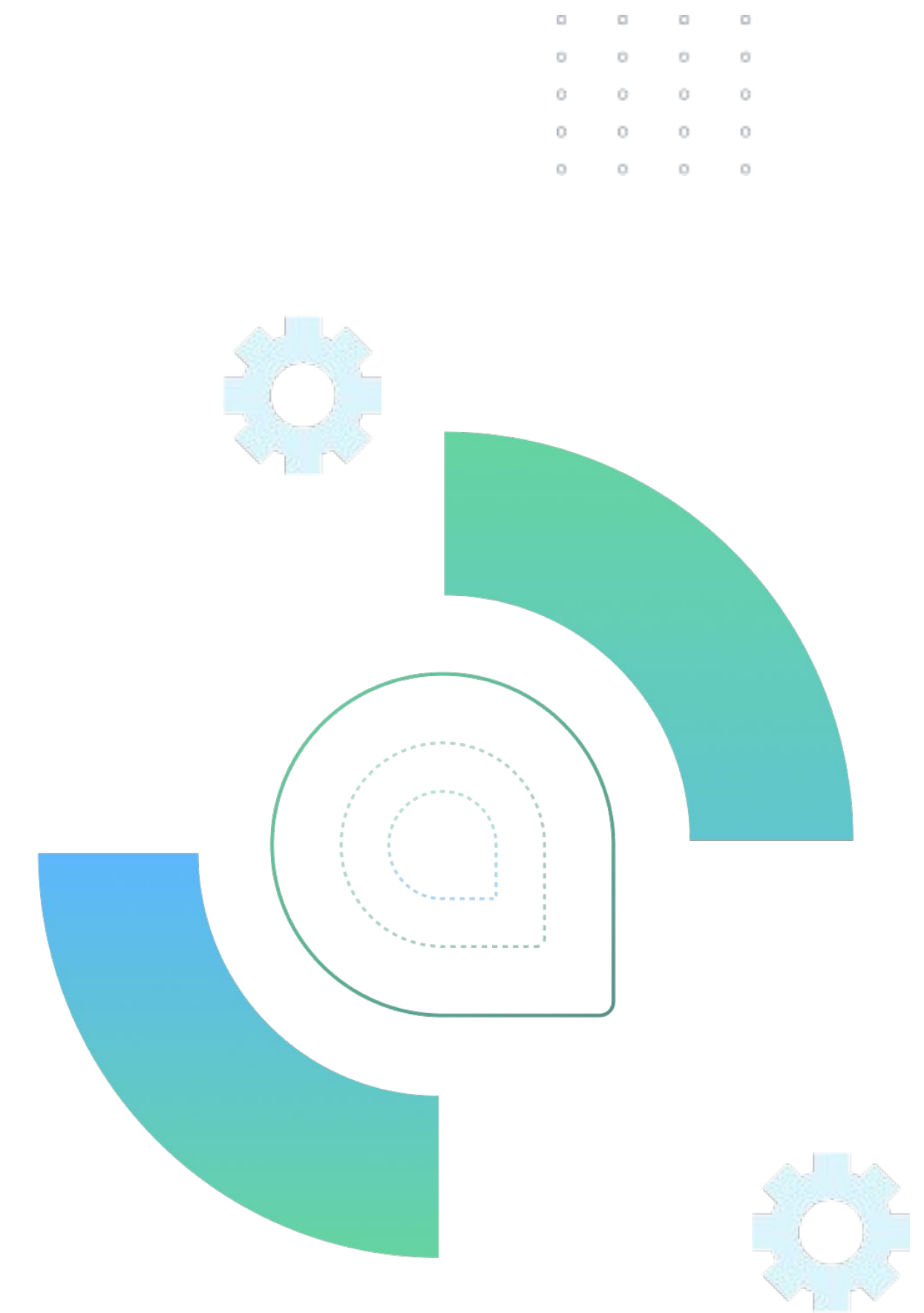
The **All** folder displays all your requests, including the ones already approved, except drafts.

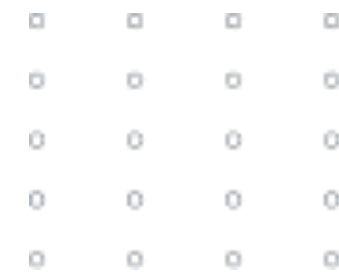


Requester notifications

There are three types of Requester notifications:

- Requesters get notified about the approvals in each step
- Requesters get notified about rejections
- Requesters get notified about all comments





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

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