



A Xero Partner success story: the introduction of Data Automation and Digital Financial Controls

AVH Business Services uses Xero as their online system of records and core accounting software. Hubdoc takes care of capturing supplier invoices, and pushes their electronic equivalent straight into Xero. This helps to avoid manual data entry and reduces the coding overhead.

However, even with automated invoice capture and keeping this data securely in the cloud, there still was a severe productivity killer: manual paper-based approvals for the accounts payable process.

The main drawbacks due to paper-driven approvals were the time wasted chasing approvers on the clients' side, figuring out the status of approval requests to make sure supplier invoices were paid on time, and – worst of all – the complete lack of approval traceability, which made audits practically impossible.

COMPANY: AVH Business Services
TYPE OF BUSINESS: Bookkeeping and BAS practice
CLIENT VERTICALS: Construction, healthcare
LOCATION: Australia



About

AVH Business Services is an Australian-based Bookkeeping and BAS practice, specialising in developing and maintaining systems that provide maximum efficiency and productivity.

Complementing Xero and Hubdoc with ApprovalMax

AVH Business Services chose ApprovalMax as it is the Xero-recommended approval app, and made it part of their trusted app stack for clients because it is pre-integrated with Xero and Xero-connected apps.

ApprovalMax provides multi-tiered and multi-role approvals for Xero documents (such as bills, purchase orders, sales invoices, etc.) and fully eradicates email- and paper-based approvals. That is a major advantage for the remotely distributed and multi-site clients of AVH Business Services.

This is how it works: supplier invoices are sent to Hubdoc and then automatically pushed to Xero as bills. ApprovalMax pulls from Xero all bills with the 'Awaiting approval' status and runs them through a predefined approval workflow to ensure proper bill authorisation by the designated approvers for each authorisation level. Automatic notifications are sent to all approvers to timely notify them of requests pending their decision.

Results: time savings and full audit-readiness

Now, all construction and healthcare clients of AVH Business Services use ApprovalMax to automate their invoice approval process:

- Several levels of authorisation are normally set using the approval criteria pulled from Xero
- Exception handling such as approval delegation is enabled and automated as well
- All approval decisions are closely tracked and captured in an audit log
- Approvers and requesters can leave comments in the approval request for context clarification

VIANNE HILLS, Director

"We now have full visibility into all comments left, and a full audit trail regarding who approved what. So if there's a delay, we can check these notes to find an explanation for why there's no approval yet, or why the request has been rejected."

Benefits achieved

- ✓ Centralised and fully digital financial controls
- ✓ Time savings for both approvers and the accounting team
- ✓ Much less effort is spent on audit preparation
- ✓ Ability to scale services without the need to grow staff

VIANNE HILLS Director

"No other software can offer this level of competency while ensuring that the company data remains secure and separate, and the added benefit of being able to set up rules for different approvers/secondary approvers is outstanding."



The Approval App You'll love using

ApprovalMax extends the online accounting platform Xero with approval-driven financial controls for Accounts Payable and Accounts Receivable. It replaces paper- and email-based approvals with fully automated multi-role and multi-tiered approval workflows, and ensures spend control and regulatory compliance for both internal accounting and financial service outsourcing organisations.