ApprovalMax

ApprovalMax complements Xero in a cloud accounting solution for the largest agribusiness event in the Southern Hemisphere.

ANTHONY BURMAN
CFO

"ApprovalMax enables us – in the simplest way possible – to create a complex approval matrix wherein we define roles, business rules, and routing workflows, while being intuitive and easy to use.

We now have the ability to track the approval status, pinpoint bottlenecks in the process, and make sure everything is completed in a timely manner. Our approval process has since gained a significantly higher degree of control and visibility."

COMPANY:	New Zealand National Fieldays Society Inc.
TYPE OF BUSINESS:	Agribusiness, non-for-profit society
LOCATION:	New Zealand

New Zealand National Fieldays Society Inc.

Benefits

✓ **Process visibility and control:** approval status tracking and push notifications

✓ **Work on the go:** web and mobile apps, pre-integrated with Outlook

✓ **Ease of use:** approval workflow setup and changes without help from the IT

✓ **Speedy and flexible changes:** no technical skills required to implement and execute

ApprovalMax

ApprovalMax complements Xero in a cloud accounting solution for the largest agribusiness event in the Southern Hemisphere.

New Zealand National
FIELDAYS
Society Inc.

Problem

In light of success and growth, the Society was undergoing significant change. Building on the collaborative relationship with Xero, the Organisation moved from a cumbersome ERP system to Xero's modern cloud-based accounting platform.

This allowed the Society to overcome one of our critical challenges: lengthy and costly implementation of changes. With Xero, the accounting processes became available both online and on mobile devices. But most importantly, they are now so much easier to set up and evolve.

However, the Society still had to tackle one more thing – finance approvals. More precisely, it needed the ability to replicate the way approvals used to work in the decommissioned system and to enhance them in order to address the growing compliance and regulatory requirements of our booming agribusiness.

Solution

ApprovalMax is pre-integrated with Xero and complements it with fully functional approval workflows. Xero serves as the central system into which all our finance documents are fed.

ApprovalMax works with every finance document present in Xero, such as Purchase Orders, Bills, Sales Invoices, and Credit Notes. POs can also get raised in ApprovalMax and are then routed for multi-step approval. Purchase Orders, incoming Bills, Sales Invoices, and Credit Notes are all covered by the predetermined approval process and make their way through the corresponding workflow.

The approval request routing is defined in the approval matrix to make sure that finance documents are directed to the appropriate managers with the correct level of authorization and approval authority, regardless of the document's origin.

"With ApprovalMax we are able to set complex routing rules and Approver roles, including Delegates. In short, it's exactly the native solution we've been looking for."

ANTHONY BURMAN
CFO

Results

✓ Improved process efficiency: approval, authorization, and validation made fast and easy

✓ Ensured compliance and accountability: strictly defined Approver roles and approval routing rules

✓ Enhanced team productivity: less time spent on paperwork and clarification

✓ Increased accuracy and audit readiness: approval activities fully traceable in history logs and reports

xero CONNECTED APP

The Approval App You'll love using

ApprovalMax is designed to be extremely easy and highly intuitive. Finance managers can visually set up workflows and the approval matrix in a web browser. Approvers receive approval requests in the app or as an email notification – on both web-based and native iPhone or Android platforms.

ApprovalMax