

## Partner Success Story

### BDO South Australia & ApprovalMax

# BDO South Australia implements ApprovalMax for internal bill automation

#XeroPlatinumChampionPartner

#BillAutomation

#Efficiency

#Paperless

#AU



SARAH WHITE

Finance & Administration Manager, Shared Services

“When running a large and quickly growing business & accountancy advice practice, maintaining efficiency and agility while dealing with an increasing number of internal finance documents that need proper review and authorisation is a tall order.

ApprovalMax provides the best way for addressing these challenges and enables easy-to-use mobile access to bill authorisation data for all our Partners and staff across South Australia. Flexible and agile controls for the approval process, timely notifications, status updates and an automated audit trail – this is how ApprovalMax reduces significantly the unnecessary overhead in our internal operations, and provides a solid foundation for growth.”



#### Company

BDO South Australia provides expert business and accountancy advice across a broad range of industry sectors. BDO SA is the largest locally owned accounting and advisory firm in South Australia, with a team of more than 160 Partners and staff located in offices in the Adelaide CBD and McLaren Vale.

#### Type of business

Both traditional and contemporary business advisory as well as financial and accounting services

#### Location

Adelaide, Australia

## The challenge of running an advisory practice

Leading a successful accounting and advisory practice typically implies you are a growing company with multiple clients and a lot of staff. This translates into dealing with numerous practice-related bills such as rent, catering, IT costs, memberships, association and incorporation fees as well as client disbursements & filing fees. Also, the need to personally interact with clients across a large geographical area such as South Australia means travel and accommodation bills become a huge part of the organisational spend management.

Processing all these bills and expenses in a timely manner constitutes a job of its own as it requires printing, distributing, physically signing, collecting and collating all relevant documents. This is wasting a lot of time and effort, and not environment-friendly. Handling approvals via scans and emails does not improve the situation significantly. Plus, the challenge of identifying correctly the responsible approvers, compiling emails and listing relevant spend details as well as tracking due dates and approval statuses still remains.

“With ApprovalMax, our Partners and staff can now timely review and approve bills even while on the go. All approval-related data is provided within the app, and approval decisions are automatically captured in an audit report,” – **says Sarah White, Finance & Administration Manager, Shared Services.**

## Approval-driven bill automation

That’s why BDO South Australia selected ApprovalMax as the core of their internal approval-driven bill automation.

All bills and costs that are processed internally are now run through ApprovalMax. Once bills have been created in Xero, ApprovalMax automatically pulls and then routes them according to the authorisation rules as defined by BDO South Australia in the approval matrix.

Different types of bills are routed to particular approvers depending on specific criteria. For example: IT bills go to certain approvers depending on the supplier used, while Travel & Accommodation bills are passed on to those approvers who are responsible for travel expenses in that particular area of the business.

All approvals are done within the ApprovalMax application, having a full audit trail and the history of approval-related communications automatically captured. The status of all approval requests is immediately visible to authorised personnel. Implementing ApprovalMax also provides a huge benefit for frequently travelling Partners and staff, who need to approve bills on the go.

## Results and benefits

**Coupled with Xero, ApprovalMax replaces inefficient, slow and error-prone email- or paper-based approvals with a fully digital, highly automated and completely transparent process.**

- ✓ Improved efficiency: no more overhead of paper- and email-based approvals
- ✓ Data quality: all spend details are up to date and available in real time
- ✓ Agility: approval routing rules are easy to set up and adjust
- ✓ Time savings: ready-to-use audit trails and reports



## The Approval App You’ll Love Using

ApprovalMax allows accounting and advisory practices to set up 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. This ensures full regulatory compliance, simplifies audits and facilitates client collaboration.