Partner Success Story

Solutions and Services, Te Kāpehu Riccarton School & ApprovalMax

Streamlining the invoice approval process for a primary school

**#AccountingAdvisory**   **#Education**   **#Bills**   **#NotForProfits**   **#AUNZ**

"ApprovalMax facilitates a streamlined process that teachers love and find a lot easier than the old system. Removing barriers and as much administrative work as possible for them is really important because it gives them more time to put into their actual job.

It also saves me a lot of time, which I can spend on applying for funding and grants – obviously a lot more rewarding than processing invoices."

DEBBIE HARRAWAY,
School Business Manager
Te Kāpehu Riccarton School
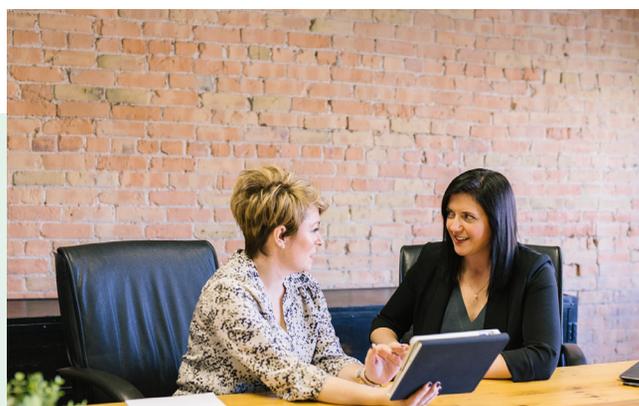
Partner company
Solutions and Services has been supporting New Zealand schools with financial and administration services for over 27 years. Being Xero partners since 2014 and now Xero Platinum partners, they serve more than 400 schools in various ways.

Type of business
Accounting and advisory practice

Location
New Zealand

The challenges

Te Kāpehu Riccarton School started the digital transformation of their finance function a while ago when they implemented Xero, Hubdoc for invoice digitisation and Monty for reporting purposes. They also had a digital approval process based on PDF files getting sent around by email. The school's business manager used to receive invoices via Hubdoc, then she had to attach both an electronic approval form and a list of budgets before passing all on to the responsible approvers. When the authorised invoices were returned, they had to be forwarded to Hubdoc and posted to Xero. Normally, their process consists of two steps: collecting the approval of the budget holder first, and then the principal's – but larger amounts require three approvers.

Introducing an efficient paperless approval process

ApprovalMax simplifies this process enormously. No more manual routing, or sending invoices to budget holders and back to Xero. After an initial review to make sure each invoice goes to the right budget holder, it all works automatically.

Everyone loves the streamlined process and all find it a lot easier than the old system. Removing barriers and as much administrative work as possible is really important because it gives teachers more time to put into their actual job.

And there's another advantage of using ApprovalMax: annual audits are definitely easier now because auditors just log into the school's Xero file to find a detailed audit report attached to every invoice, proving that all approval rules and the specified delegation of authority were duly followed. They don't need to spend time at the school physically looking at paper invoices, and audits are much faster.

Results of the implementation

- ✓ Fully paperless workflow and complete eradication of error-prone and time inefficient manual authorisations
- ✓ Transparency and control: invoices cannot "go missing" as it is simple to track them
- ✓ Easy annual audits thanks to detailed audit reports
- ✓ Convenience for budget holders: easy approving via laptop or mobile app

"ApprovalMax simplifies our approval process enormously, even to the point that it's easy to forget it exists at all as there's no more manual routing require," **– says Debbie Harraway, School Business Manager at Te Kāpehu Riccarton School.**

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.

ApprovalMax

Email: hello@approvalmax.com
Phone: +44 20 3034 3380
Web: www.approvalmax.com