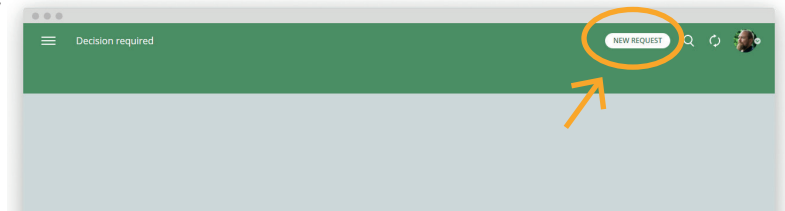# ApprovalMax

Creating bills and purchase orders in ApprovalMax

How to create a new bill or purchase order

First, click on NEW REQUEST …

… then, fill in the required fields as shown below:

VENDOR DETAILS: this will be entered automatically with information from the general ledger

MEMO: here you can add any information that you consider helpful for the person approving and handling the purchase order further
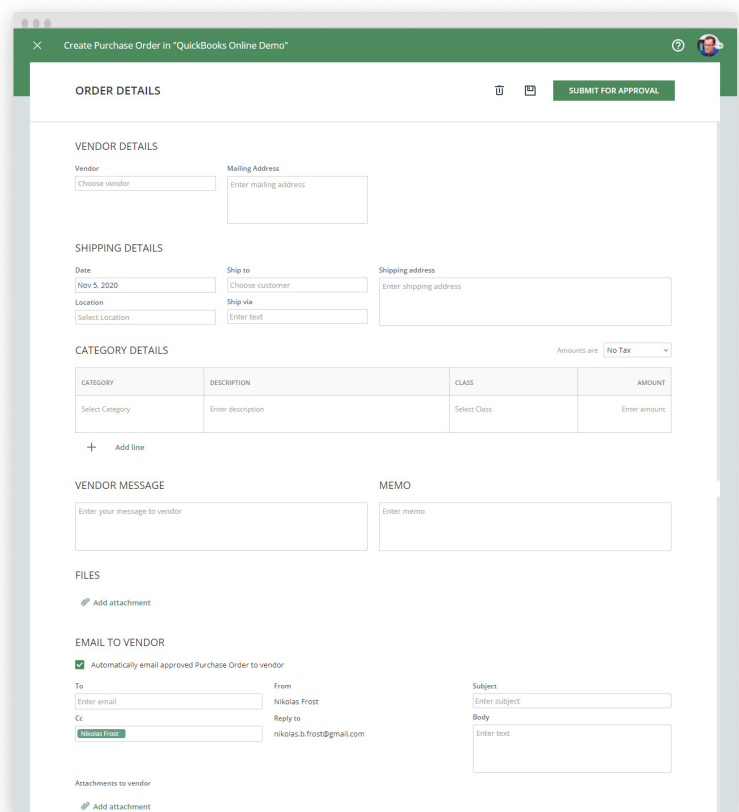
DESCRIPTION: this field is not mandatory; the item description will be pulled from the general ledger

CLASS: coding is mandatory (this can also determine who approves the purchase order)

CATEGORY: as this is set up by the Administrator, this field might be named differently in your organisation. It is usually mandatory as it defines who is to approve the purchase order.

EMAIL TO VENDOR: here you can tick the box so that the purchase order will be automatically sent to vendor once it's approved
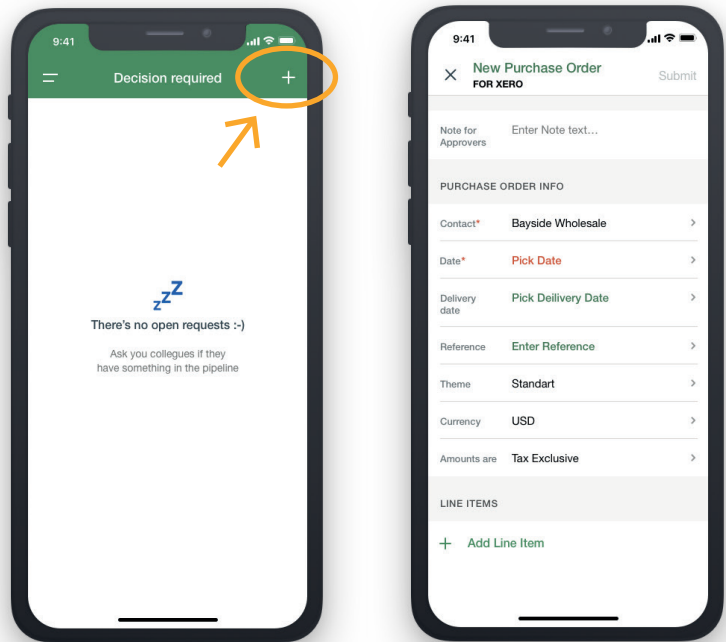
When you're done, click on "Submit for Approval".

ApprovalMax

Creating bills and purchase orders in ApprovalMax

How to create a new bill or purchase order using mobile app

Creating bills and purchase orders using mobile app works the same way: tap "+" symbol to start, fill in the required fields and click on "Submit for Approval".
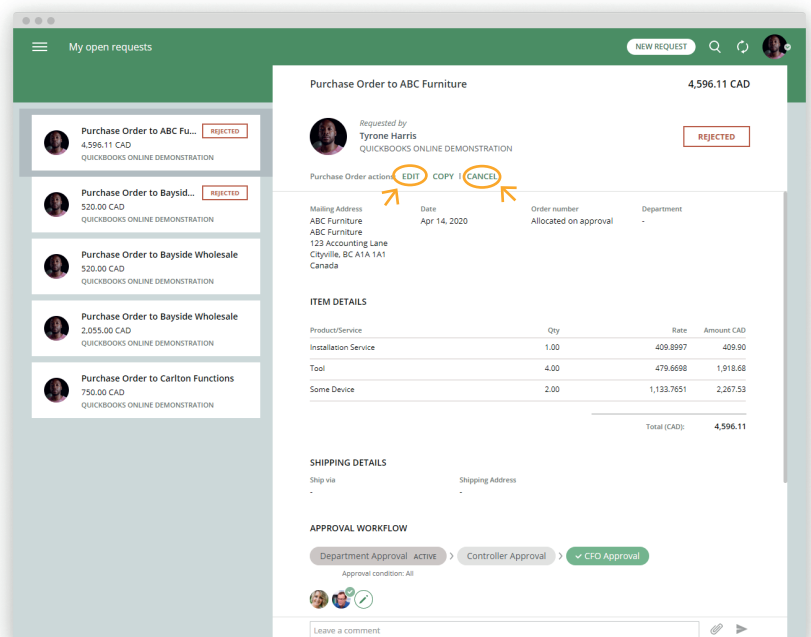

How to edit a purchase order

To resubmit a rejected purchase order, click on "Edit", make your changes and then click on "Resubmit for Approval".

To cancel a purchase order, click on "Cancel".

Until a purchase order has been fully approved, it can be edited in any workflow step. If this is the case, the approval workflow will start over.
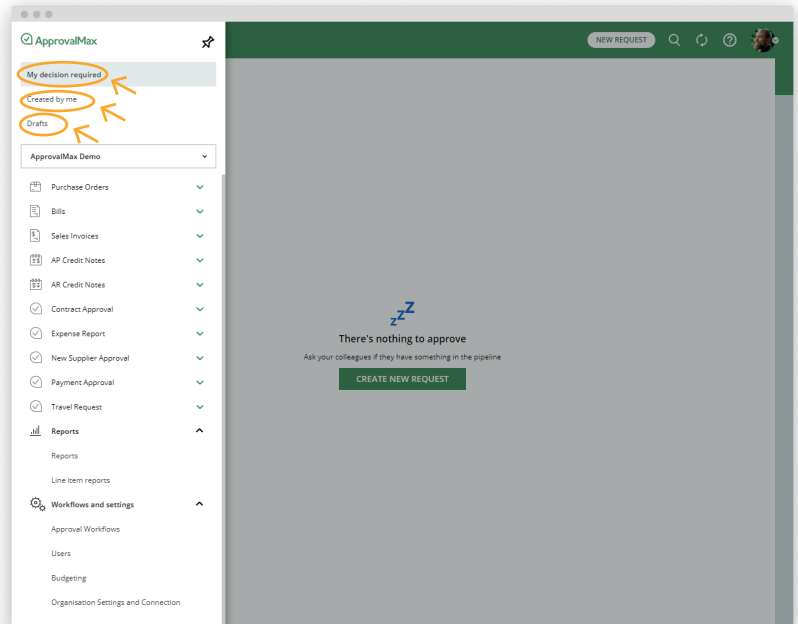
ApprovalMax

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

How to find all your bills and purchase orders

When you log into ApprovalMax, you'll see the following screen:

"My decision required" contains all requests that currently require your decision. In "Created by me", you can find all your pending requests and check their status. Your drafts are in the "Drafts" section.

What happens after bill or purchase order has been submitted for approval

If you yourself are the Approver, you'll be taken to the "Decision required" screen after clicking on "Submit for Approval". You can then approve the document immediately.

If you are not the Approver, clicking on "Submit for Approval" will route the request to the person responsible for authorising it – who will receive a notification and subsequently approve (or reject) your request. Once this has been done, you'll either be notified that your bill or purchase order has been approved, or receive the Approver's comment on why it was rejected.
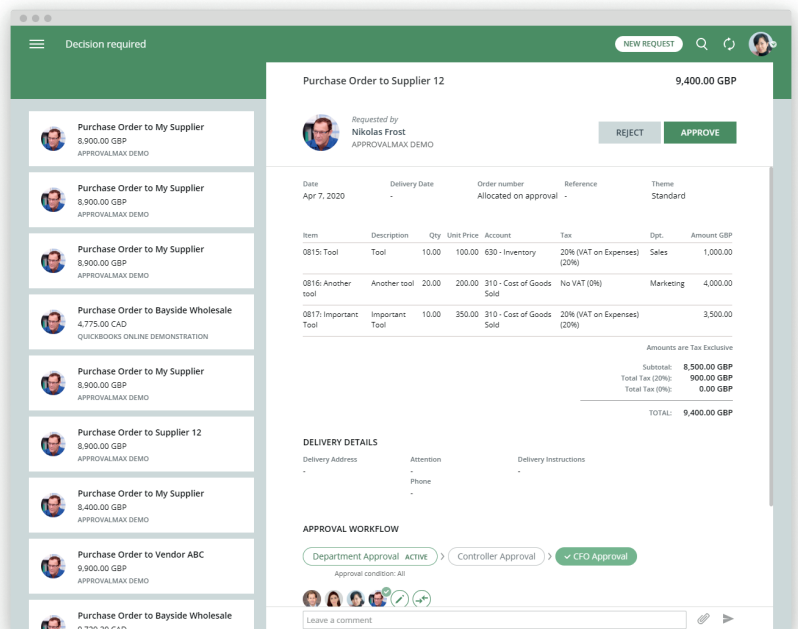
Once fully authorised, purchase orders are automatically created in the accounting system and can be automatically sent to suppliers. Bills will be posted to the accounting system ready to be paid.

ApprovalMax

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