

The
'APPY HOUR[®]
with Liz & Heather
www.theappyh Hour.com

**Firm Spotlight with
Entreflow!**

 **ApprovalMax**



Meet your Hosts

The
'APPY HOUR[®]
with Liz & Heather
www.theapphour.com



Heather Satterley

Director of Education and Media, Woodard

Liz Scott

CEO, Liz Scott Training & Consulting



Helina Patience

CEO, Entreflow Consulting Group

- 15+ years of global finance and HR experience.
- Founder of Entreflow Consulting, a cloud accounting CPA and recruitment firm.
- Supports startups with accounting, CFO, HR, and software services.
- QuickBooks Elite ProAdvisor and member of Intuit Accountant's Council.
- Mentor for CPABC and other organizations.



Proposals



Approval Workflow



Accounts Payable



Inventory



Outsourcing



Training



THANK YOU 2024 SPONSORS!

FIRM INSIGHTS

TEAM SIZE:

25

CLIENT SIZE:

150

NICHE:

**High
Growth**

**GROWTH
GOALS:**

- 25% Rev Growth in 2024
- Launching Entreflow Accounting





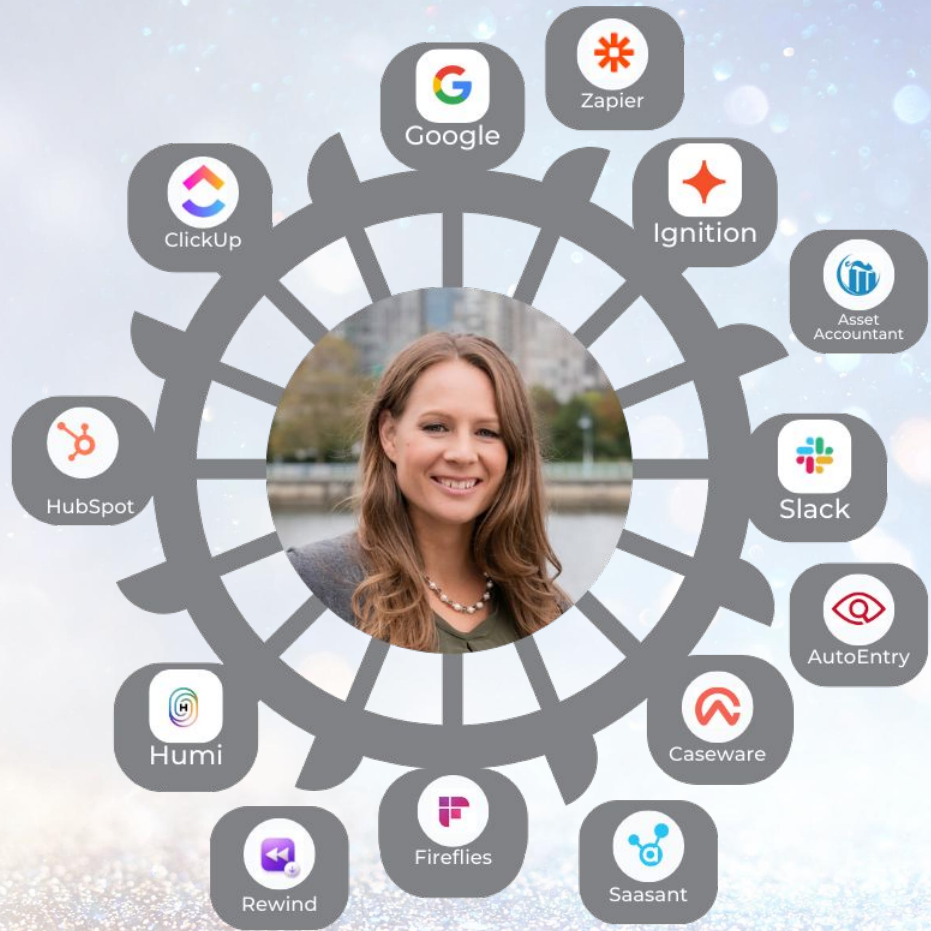
WHAT MAKES A SUCCESSFUL PARTNERSHIP

**Ecosystem
Focus**

**Reliable
Support**

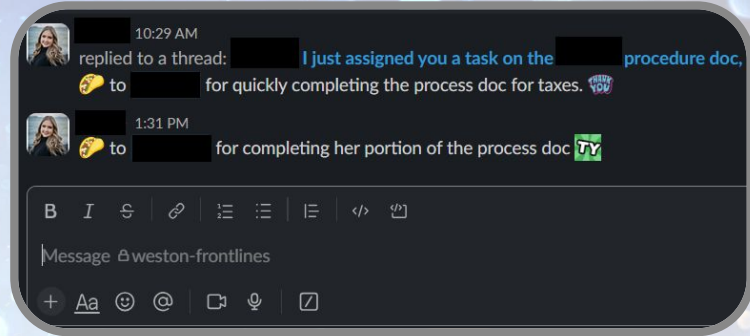
**Feedback
Responsiveness**

**Mutual
Success**



INTERNAL TECH STACK

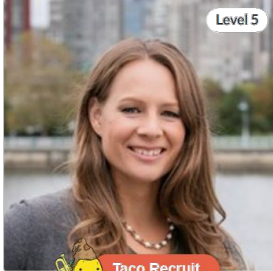
- Google Suite
- Ignition
- Asset Accountant
- Auto Entry
- Saasant
- Slack
- ClickUp
- Zapier
- Humi
- Caseware
- Fireflies
- Hubspot
- Rewind



Leaderboard Filter: Tacos received Month All channels

Rank	Person	Total Tacos
1		4
2		4
3		3
4		3
5		2
6		2
7		2
8		2

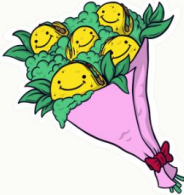
Level 5



helina
Redeemable Tacos
10

Taco Shop


5 1



Taco Bouquet
To show your gratitude with a gift that's both tasty and neat, a taco bouquet is hard to beat.
1 Unlocked

Give Sticker

∞ 1

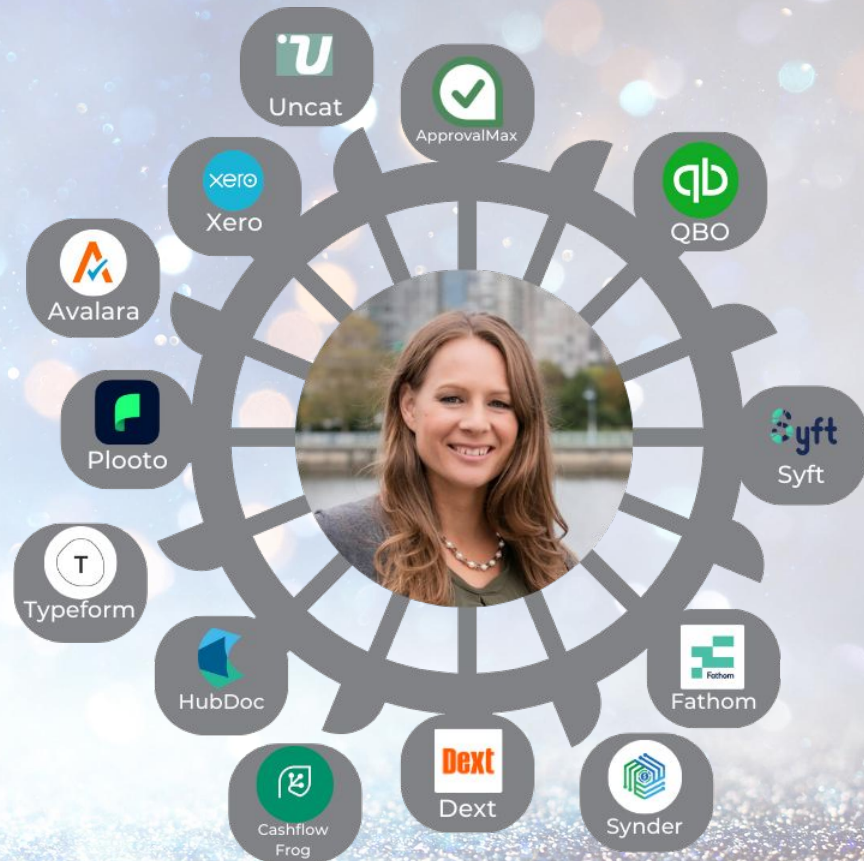


Taco Confetti
Taco confetti, let's unite, and all celebrate and take a big bite, but beware, the confetti's sneaky flight, it may end up in your hair despite.
1 Unlocked

Give Sticker

EXTERNAL TECH STACK

- QBO
- Xero
- ApprovalMax
- Syft
- Dext
- Hubdoc
- Ploto
- Fathom
- Cashflow Frog
- Uncat
- Avalara
- Synder
- Typeform



- Approval workflow
- Assignment options

+ ADD NEW USERS ?

<input type="checkbox"/>	Name	Email	Role	Status	2FA	Substitute	Start date	End date
<input checked="" type="checkbox"/>	Charles	@entreflow.com	Administrator	Active	<input type="radio"/> Disabled		-	-
<input checked="" type="checkbox"/>	Grace	@entreflow.com	Administrator	Active	<input type="radio"/> Disabled	Select substitute	-	-
<input checked="" type="checkbox"/>	Helina	@entreflow.com	Account owner	Active			-	-
<input checked="" type="checkbox"/>	Madeline	@entreflow...	Administrator	Active			-	-

About Substitution
Substitution allows to cover cases when approver becomes temporary unavailable and someone else needs to make decisions for them.

[SELECT SUBSTITUTE](#)

Vendor workflow

Knowledge Base ▾ How-to videos ▾ | Setup and training package ▾ [HIDE](#)

Creation / Pulling of Vendor > + > Approval step > Approval step > + STEP > Creation in QuickBooks

Create in ApprovalMax

Add users authorised to create Vendors and submit them for approval in ApprovalMax.

[ADD A REQUESTER](#)

- Charles**
without any restrictions
- Helina**
without any restrictions

[ADD AN APPROVER](#) 1 d Based on Approval

Approval condition: Any of ▾

- Grace**
should approve everything

[ADD AN APPROVER](#) 2 d Based on Approval

Approval condition: Any of ▾

- Madeline**
should approve everything

Vendors will be automatically created in QuickBooks Online upon final approval.

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The 'Appy Hour with Liz & Heather





The 'Appy Hour Lounge Facebook Group