

MASON EDWARDS & ZACH MONTANDON

# **From Bottleneck to Breakthrough: Approvals**

## **Featuring ActivityHD Self-Serve**





**Mason Edwards**

Implementation Specialist



**Zach Montandon**

Support Specialist

# SESSION AGENDA

1

Why Approvals Matter

4

Credit Card Approvals

2

Purchase Order Approvals

5

Approvals on the Go?!  
Self Serve!

3

AP Invoice Approvals

6

Questions

# Why Approvals Matter?

- The old way
  - Chasing down signatures
  - Limited visibility into approval status
  - Approvals tied to a desk or office
- The cost of bottlenecks
  - Time lost waiting for approvals
  - Frustration for approvers and finance teams
  - Delayed closes and downstream processes

- What's possible today
  - Approve from anywhere, at any time
  - Greater visibility and control
  - Faster, more streamlined workflows

## OUR STUDY COVERED

 **2,402** CASES from  **143** COUNTRIES and TERRITORIES

Causing total losses of more than  
**\$3.4 BILLION**

MEDIAN LOSS  
PER CASE:  
**\$104,000**  
AVERAGE LOSS  
PER CASE:  
**\$1,457,000**

## FRAUD LOSSES

CFEs estimate that organizations **LOSE**

 **5%** of revenue to **FRAUD** each year

## ANTI-FRAUD CONTROLS

The presence of anti-fraud controls is associated with

 **LOWER** fraud losses **AND**  **QUICKER** fraud detection



**80%** of victim organizations **MODIFIED** their anti-fraud controls following the fraud.

**MORE THAN HALF** of occupational frauds occurred due to a lack of internal controls or an override of existing internal controls.

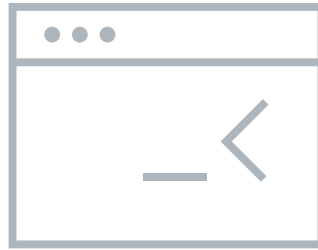
# Approvals as an Internal Control

ACFE Report of Organizations

# EVOLUTION OF APPROVALS



Purchase Orders



AP Invoices



Credit Card Approvals

# Purchase Order Approvals

- Planned purchases
- Commitments
- Invoices from POs inherit the approval
- Purchasing allows for detail level items
- Driven by the same great system
  - Restrict Operators
  - Restrict Vendors
  - Account Mask
  - Personalize Notification Emails

- Driven by Department setup from the Purchasing module that allows for several layers of automation and handling
  - Restrict Operators
  - Restrict Vendors
  - Account Mask
  - Attribute Assignments
- Master Operator

# DEPARTMENTS

Department - "Prod" for Demo Aspire - ACW - Zach Montandon



New

Read

Save

Report

Previous

Next

## Department for Demo Aspire

Name:

Description:

### Department

Shipping Address:

Approval Levels:

☐ Commitments

☐ Inventory

☐ Immediate Invoicing and Receiving

☐ Restrict Operators

☐ Restrict Vendors

### GL Account Masks

Liability:

Expense:

Inventory:

### Commitments

Batch:

GL Batch:

Liability:

Distribution:

### Default Attributes

EventAttr:

Project Code:

Series Type:

### Operators



| Approval |                  |       |       |                                     |
|----------|------------------|-------|-------|-------------------------------------|
| Line     | Operator         | Level | Limit | Master                              |
| 1        | Gray, James C.   |       |       | <input checked="" type="checkbox"/> |
| 2        | Hope, Emily K.   |       |       | <input type="checkbox"/>            |
| 3        | Stefanie Rosales |       |       | <input checked="" type="checkbox"/> |
| 4        | Mason Edwards    | 1     |       | <input type="checkbox"/>            |
| 5        | Traci Martin     | 1     |       | <input type="checkbox"/>            |
| 6        | Zach Montandon   | 2     |       | <input type="checkbox"/>            |

### Approval Rules



| Line | Approval Range |           | Required Approval Levels            |                                     |                                     | Memo |
|------|----------------|-----------|-------------------------------------|-------------------------------------|-------------------------------------|------|
|      | At Least       | Less Than | Level 1                             | Level 2                             | Level 3                             |      |
| 1    | 0.00           | 2,000.00  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |      |
| 2    | 2,000.00       | 10,000.00 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |      |
| 3    | 10,000.00      |           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |      |

Buffer %:  Min:  Max:

# Master Approver

## Do



- Sparingly
- As Necessary
  - Turnover
  - Travel
  - Emergency
- Add a Good Note

## Don't



- Skip Habitually
- Make Everyone a Master!
- Treat as Easy Button

- Notifications that can be set up and driven by individual Operators
  - Approval Required
  - Completed
  - Disapproved
- Honors Permissions

Operator for Demo Aspire

Name:

Navigation:

| Line | Notification                 | Method                                                                                                                                                                                               | Filters |
|------|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
|      | 1 Invoice Approval Completed | Email, All                                                                                                                                                                                           |         |
|      | 2 Invoice Approval Needed    | Email, All                                                                                                                                                                                           |         |
|      | 3 Invoice Disapproved        | Email, All                                                                                                                                                                                           |         |
| I    | 4 Order Approval Needed      | <div>Email, Assigned Level Required and Delayed<br/>Email, All<br/>Email, Assigned Level or Higher (Limited)<br/>Email, Assigned Level Required<br/>Email, Assigned Level Required and Delayed</div> |         |

<

Operator Notifications Data Links Attachments Change Logs Other

Edit



## Create a Record



Create the PO



## Ready for Approvals



Submit as Ready for approval  
to trigger the approver  
notifications



## Approved!



The status will be Master  
when the approvals are  
completed!

# EXAMPLE



Options: Defaults

## Purchase Order for Demo Aspire

**Vendor:** CoNetrix CoNetrix Technology **Number:** 00219 **Date:** 9/22/2026

**Description:** Laptops **Department:** Prod **Status:** Ready Submit

**Purchase Order**

**Agent:**  **Amount:** 4,250.00

**Expires:**  **Balance:** 4,250.00

**Owner:** Zach Montandon **Approval:**

**AP Terms:** Cash ☐ Post Commitments

**AP Account:** 2100-01-00000-A Accounts Payable

**Attributes**

**EventAttr:**

**Project Code:**

**Series Type:**

**Shipping**

☒ Multiple Shipments ⏪ ⏩ ⏴ ⏵ + - ✓

| Ship | Ship Date | Arrival Date | Address    | Freight Terms | FOB | Shipping Method | Tracking Number | Memo |
|------|-----------|--------------|------------|---------------|-----|-----------------|-----------------|------|
| 1    | 5/14/2026 |              | CorpOffice |               |     |                 |                 |      |
| 2    | 5/7/2026  |              | CorpOffice |               |     |                 |                 |      |

**Address:** Corporate Office  
1414 Mockingbird Lane  
Lubbock, TX 79424  
Main: 1-800-125-2622

**Purchases**

⏪ ⏩ ⏴ ⏵ + - ✓

| Line | Ship | Product | UOM | Description | Quantity | Unit Cost | Amount | EventAttr | Project Code | Series Type | Account | Part Number |
|------|------|---------|-----|-------------|----------|-----------|--------|-----------|--------------|-------------|---------|-------------|
| <    |      |         |     |             |          |           |        |           |              |             |         |             |

Approval History Purchases Print Records Invoices Payments Receipts Notes Attachments Change Logs Other



# EXAMPLE

## Operators



|      |                  | Approval |       |                                     |   |
|------|------------------|----------|-------|-------------------------------------|---|
| Line | Operator         | Level    | Limit | Master                              |   |
| ▶ 1  | Gray, James C.   |          |       | <input checked="" type="checkbox"/> | ^ |
| 2    | Hope, Emily K.   |          |       | <input type="checkbox"/>            |   |
| 3    | Stefanie Rosales |          |       | <input checked="" type="checkbox"/> |   |
| 4    | Mason Edwards    | 1        |       | <input type="checkbox"/>            |   |
| 5    | Traci Martin     | 1        |       | <input type="checkbox"/>            |   |
| 6    | Zach Montandon   | 2        |       | <input type="checkbox"/>            | ▼ |

## Approval Rules



|      |  | Approval Range |           | Required Approval Levels            |                                     |                                     |      |
|------|--|----------------|-----------|-------------------------------------|-------------------------------------|-------------------------------------|------|
| Line |  | At Least       | Less Than | Level 1                             | Level 2                             | Level 3                             | Memo |
| ▶ 1  |  | 0.00           | 2,000.00  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |      |
| 2    |  | 2,000.00       | 10,000.00 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |      |
| 3    |  | 10,000.00      |           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |      |

Buffer %:  Min:  Max:

# EXAMPLE

Inbox ★

Workspace 365

W3

You've been Invited to Join a Group

9:25 AM

Welcome to Workspace 365 Zach, Welcome to the...

no-reply@accountingware.com

N

Purchase Order Approval Notification (002...

8:42 AM

Zach Montandon, A Purchase Order is ready to be...

no-reply@accountingware.com

☐

Purchase Order Approval Notification (00...

8:41 AM

Zach Montandon, A Purchase Order is ready to be...

no-reply@accountingware.com

To: Zach Montandon

Tue 9/22/2026 8:41 AM

Zach Montandon,

A Purchase Order is ready to be Approved for Demo Aspire.

Vendor: CoNetrix - CoNetrix Technology

Number: 00219

Department: Prod

Description: Laptops

Amount: 4,250.00

Owner: Zach Montandon

Go to [selfserve-aspire.accountingware.com](https://selfserve-aspire.accountingware.com) to Approve the Order.

This is an automated message sent by the AccountingWare Activity Notification System.

Department: Prod

Status: Master

 **InterActiv**  
CONFERENCE

### **APO-229 — Department recorded with each Approval**

- Provides better audit-trail context
- Makes it easier to identify why an approval was disapproved

### **APO-228 — Approvals reset when Department changes**

- Prevents stale approvals from slipping through
- Ensures approvals reflect the current department



Options: Defaults



## Purchase Order for Demo Aspire

**Vendor:** BakerOff Baker Office Products

**Number:** 00215

**Date:** 7/9/2026

**Description:** Chairs for Round Table Podcast

**Department:** NoApproval

**Status:** Ready

Submit

### Approval History

| Date                | Removed             | Department | Level   | Approval   | Operator       | Amount   | Note                                                           |
|---------------------|---------------------|------------|---------|------------|----------------|----------|----------------------------------------------------------------|
| 7/9/2026 2:39:09 PM | 7/9/2026 2:39:44 PM | Mktg       | Level 2 | Approve    | Zach Montandon | 2,000.00 | - Approval reset due to Department change (Mktg -> NoApproval) |
| 7/9/2026 2:28:25 PM | 7/9/2026 2:29:08 PM | Mktg       | Level 2 | Disapprove | Zach Montandon | 3,000.00 | Not Yet- Disapproval removed due to new Ready Status           |

Order Approval History Purchases Print Records Invoices Payments Receipts Notes Attachments Change Logs Other

Hey look, we added a **Balance** view to the face of a PO!



Purchase Order - "00202" for Demo Aspire - ACW - Zach Montandon

## Purchase Order for Demo Aspire

**Vendor:**  Amazon **Number:**

**Description:**  **Department:**

| Purchase Order                                           |                                                        | Attributes                                |  |
|----------------------------------------------------------|--------------------------------------------------------|-------------------------------------------|--|
| <b>Agent:</b> <input type="text"/>                       | <b>Amount:</b> <input type="text" value="2,750.00"/>   | <b>EventAttr:</b> <input type="text"/>    |  |
| <b>Expires:</b> <input type="text" value="12"/>          | <b>Balance:</b> <input type="text" value="2,750.00"/>  | <b>Project Code:</b> <input type="text"/> |  |
| <b>Owner:</b> <input type="text" value="Mason Edwards"/> | <b>Approval:</b> <input type="text" value="2,750.00"/> | <b>Series Type:</b> <input type="text"/>  |  |

# AP Invoice Approvals

- Low Impact change to the existing AP Invoice Setup
- Also adds Approval History Tab and Approval button within context
- The goal is to add that extra step of verification whether internally required or externally mandated to give that little bit of security

# AP INVOICE APPROVALS

AP Invoice - "AP - 139" for Demo Implementation - ACW - Mason Edwards

New

Read

Save

Report

Previous

Next

Distribution

Approve

Merge

Pay

Void

Bots

Options: Defaults

AP Invoice for Demo Implementation

?

Batch: AP

Vendor: AtmosCorp

Invoice #: TEST071426

Amount: 7,500.00

Entry #: 139

Description: Test Gas Bill

Date: 7/14/2026

Balance: 7,500.00

Invoice

Status: New

Owner: Mason Edwards

PO #:

Source: Manual

Payment Location: Main

Atmos Energy  
PO Box 745893  
Phoenix, AZ 85027

Approval

Dept: 32 - San Diego

Status: Ready

Submit - 7,500.00

GL

AP Account: 2100-00-A

Accounts Payable

GL Date: 7/14/2026

GL Batch: AP

GL Entry:

GL Merge #:

Payment Terms

Terms: Net10 Due: 7/24/2026 Basis: 7,500.00

Discounts: (none)

GL Detail

| Line | Source  | Account   | Account Description | Event | Debit    | Credit   | Unit | Description | Memo |
|------|---------|-----------|---------------------|-------|----------|----------|------|-------------|------|
| 1    | Invoice | 2100-00-A | Accounts Payable    |       |          | 7,500.00 | \$   |             |      |
| 2    |         | 5460-02-A | Utility Exp,Dallas  |       | 7,500.00 |          | \$   |             |      |

Invoice

Extra GL

Approval History

Custom

Notes

Asset Costs

Attachments

Change Logs

Other

EditHint: Select the Previous AP Invoice

# Credit Card Approvals

## Existing Process (PO)

Purchases on PO tied directly and reconciled for individual CC holders.

## **\*New\* Process** **with AP Invoice Approvals**

- Import transactions via workbook.
- Generates invoices for each CC holder

- Import Workbook

|    | A        | B          | C           | E            | F              | G                   | H              | I          |  |
|----|----------|------------|-------------|--------------|----------------|---------------------|----------------|------------|--|
|    | Import   | Load       |             |              |                |                     |                |            |  |
| 1  |          |            |             |              |                |                     |                |            |  |
| 2  |          | APIInvoice |             |              |                |                     |                |            |  |
| 3  | Imported | Name       | Vendor Code | Invoice Date | Invoice Number | Invoice Description | Invoice Amount | Department |  |
| 4  |          |            |             |              |                |                     |                |            |  |
| 5  |          |            |             |              |                |                     |                |            |  |
| 6  |          |            |             |              |                |                     |                |            |  |
| 7  |          |            |             |              |                |                     |                |            |  |
| 8  |          |            |             |              |                |                     |                |            |  |
| 9  |          |            |             |              |                |                     |                |            |  |
| 10 |          |            |             |              |                |                     |                |            |  |
| 11 |          |            |             |              |                |                     |                |            |  |

# CREDIT CARD APPROVALS

- Import Workbook
- CTRL+SHIFT+I

|    | A          | B              | C              | E              | F                       | G                     | H                   | I |
|----|------------|----------------|----------------|----------------|-------------------------|-----------------------|---------------------|---|
| 1  | Import     | Load           |                |                |                         |                       |                     |   |
| 2  | APIInvoice |                |                |                |                         |                       |                     |   |
| 3  | A          | B              | C              | D              | E                       | F                     |                     |   |
| 4  | 1          | Name           | Short Name     | Account Number | Managing Account Number | Managing Account Name | Managing Account Na |   |
| 5  | 2          | JAMES BROWN    | JAMES BROWN    | **4616         | **4745                  | LUBBOCK CIVIC CENTER  |                     |   |
| 6  | 3          | JAMES BROWN    | JAMES BROWN    | **4616         | **4745                  | LUBBOCK CIVIC CENTER  |                     |   |
| 7  | 4          | JAMES BROWN    | JAMES BROWN    | **4616         | **4745                  | LUBBOCK CIVIC CENTER  |                     |   |
| 8  | 5          | JAMES BROWN    | JAMES BROWN    | **4616         | **4745                  | LUBBOCK CIVIC CENTER  |                     |   |
| 9  | 6          | JAMES BROWN    | JAMES BROWN    | **4616         | **4745                  | LUBBOCK CIVIC CENTER  |                     |   |
| 10 | 7          | JAMES BROWN    | JAMES BROWN    | **4616         | **4745                  | LUBBOCK CIVIC CENTER  |                     |   |
| 11 | 8          | CEDRIC MONTOYA | CEDRIC MONTOYA | **4616         | **4745                  | LUBBOCK CIVIC CENTER  |                     |   |
|    | 9          | CEDRIC MONTOYA | CEDRIC MONTOYA | **4616         | **4745                  | LUBBOCK CIVIC CENTER  |                     |   |
|    | 10         | CEDRIC MONTOYA | CEDRIC MONTOYA | **4616         | **4745                  | LUBBOCK CIVIC CENTER  |                     |   |
|    | 11         | CEDRIC MONTOYA | CEDRIC MONTOYA | **4616         | **4745                  | LUBBOCK CIVIC CENTER  |                     |   |
|    | 12         | CEDRIC MONTOYA | CEDRIC MONTOYA | **4616         | **4745                  | LUBBOCK CIVIC CENTER  |                     |   |
|    | 13         | JORDAN VALDEZ  | JORDAN VALDEZ  | **4616         | **4745                  | LUBBOCK CIVIC CENTER  |                     |   |
|    | 14         | JORDAN VALDEZ  | JORDAN VALDEZ  | **4616         | **4745                  | LUBBOCK CIVIC CENTER  |                     |   |
|    | 15         |                |                |                |                         |                       |                     |   |

# CREDIT CARD APPROVALS

- Import Workbook
- CTRL+SHIFT+I

| Import   |                | Load        |              |                |                             |                |             |                                |
|----------|----------------|-------------|--------------|----------------|-----------------------------|----------------|-------------|--------------------------------|
| Imported |                | APIInvoice  |              |                |                             |                |             |                                |
|          | Name           | Vendor Code | Invoice Date | Invoice Number | Invoice Description         | Invoice Amount | Department  | Memo                           |
|          | JAMES BROWN    | USB         | 6/22/2026    | 6/22/2026      | JAMES BROWN - 06/22/2026    | 416.12         | Credit Card | 5/23/2026 - FACEBK *2EAUJQM8C2 |
|          |                |             |              |                |                             |                |             |                                |
|          |                |             |              |                |                             |                |             |                                |
|          |                |             |              |                |                             |                |             |                                |
|          | CEDRIC MONTOYA | USB         | 6/22/2026    | 6/22/2026      | CEDRIC MONTOYA - 06/22/2026 | 5.74           | Credit Card | 5/27/2026 - EFI05570828202605  |
|          |                |             |              |                |                             |                |             |                                |
|          |                |             |              |                |                             |                |             |                                |
|          | JORDAN VALDEZ  | USB         | 6/22/2026    | 6/22/2026      | JORDAN VALDEZ - 06/22/2026  | 225.30         | Credit Card | 6/10/2026 - ch3gm0fn4p0qfesa   |
|          |                |             |              |                |                             |                |             |                                |

Microsoft Excel

×

Card Transactions Successfully Loaded - no errors loading

OK

|    |                |                |        |        |                      |  |
|----|----------------|----------------|--------|--------|----------------------|--|
| 10 | CEDRIC MONTOYA | CEDRIC MONTOYA | 4616   | 4745   | LUBBOCK CIVIC CENTER |  |
| 11 | CEDRIC MONTOYA | CEDRIC MONTOYA | **4616 | **4745 | LUBBOCK CIVIC CENTER |  |
| 12 | CEDRIC MONTOYA | CEDRIC MONTOYA | **4616 | **4745 | LUBBOCK CIVIC CENTER |  |
| 13 | JORDAN VALDEZ  | JORDAN VALDEZ  | **4616 | **4745 | LUBBOCK CIVIC CENTER |  |
| 14 | JORDAN VALDEZ  | JORDAN VALDEZ  | **4616 | **4745 | LUBBOCK CIVIC CENTER |  |
| 15 |                |                |        |        |                      |  |

Microsoft Excel

Card Transactions Successfully Loaded - no errors loading

OK

• Import Workbook

|    | A        | B              | C           | E            | F              | G                          | H         |
|----|----------|----------------|-------------|--------------|----------------|----------------------------|-----------|
|    | Import   | Load           |             |              |                |                            |           |
| 1  |          |                |             |              |                |                            |           |
| 2  |          | APIInvoice     |             |              |                |                            |           |
| 3  | Imported | Name           | Vendor Code | Invoice Date | Invoice Number | Invoice Description        | Invoice # |
| 4  | Imported | JAMES BROWN    | WFCREDIT    | 6/22/2026    | 6/22/2026      | JAMES BROWN - 06/22/2026   |           |
| 5  | Imported |                |             |              |                |                            |           |
| 6  | Imported |                |             |              |                |                            |           |
| 7  | Imported |                |             |              |                |                            |           |
| 8  | Imported |                |             |              |                |                            |           |
| 9  | Imported |                |             |              |                |                            |           |
| 10 | Imported | CEDRIC MONTOYA | WFCREDIT    | 6/22/2026    | 6/22/2026      |                            |           |
| 11 | Imported |                |             |              |                |                            |           |
| 12 | Imported |                |             |              |                |                            |           |
| 13 | Imported |                |             |              |                |                            |           |
| 14 | Imported |                |             |              |                |                            |           |
| 15 | Imported | JORDAN VALDEZ  | WFCREDIT    | 6/22/2026    | 6/22/2026      | JORDAN VALDEZ - 06/22/2026 |           |
| 16 | Imported |                |             |              |                |                            |           |

Activity Import Status

 Imported 3 Invoices with 13 GLDetail

OK

# CREDIT CARD APPROVALS

AP Invoice - "AP-CC - 1" for Demo Implementation - ACW - Mason Edwards



NewReadSaveReportPreviousNextDistributionApproveMergePayVoidBots

Options: Defaults

## AP Invoice for Demo Implementation

**Batch:** AP-CC

**Vendor:** WFCredit Wells Fargo Credit Card

**Invoice #:** 6/22/2026

**Amount:** 416.12

**Entry #:** 1

**Description:** JAMES BROWN - 06/22/2026

**Date:** 6/22/2026

**Balance:** 416.12

**Invoice**

Status: New☐ Merge Hold

Owner: James Brown☐ Payment Hold

PO #:

Source: Import

**Payment Location:** Main

Wells Fargo Credit Card  
PO Box 654987  
Denver, CO 80127  
USA

**Approval**

**Dept:** Credit Card

Status:  Submit -

**GL**

**AP Account:** 2100-00-A

Accounts Payable

**GL Date:** 6/22/2026

**GL Batch:** AP-CC

GL Entry:

GL Merge #:

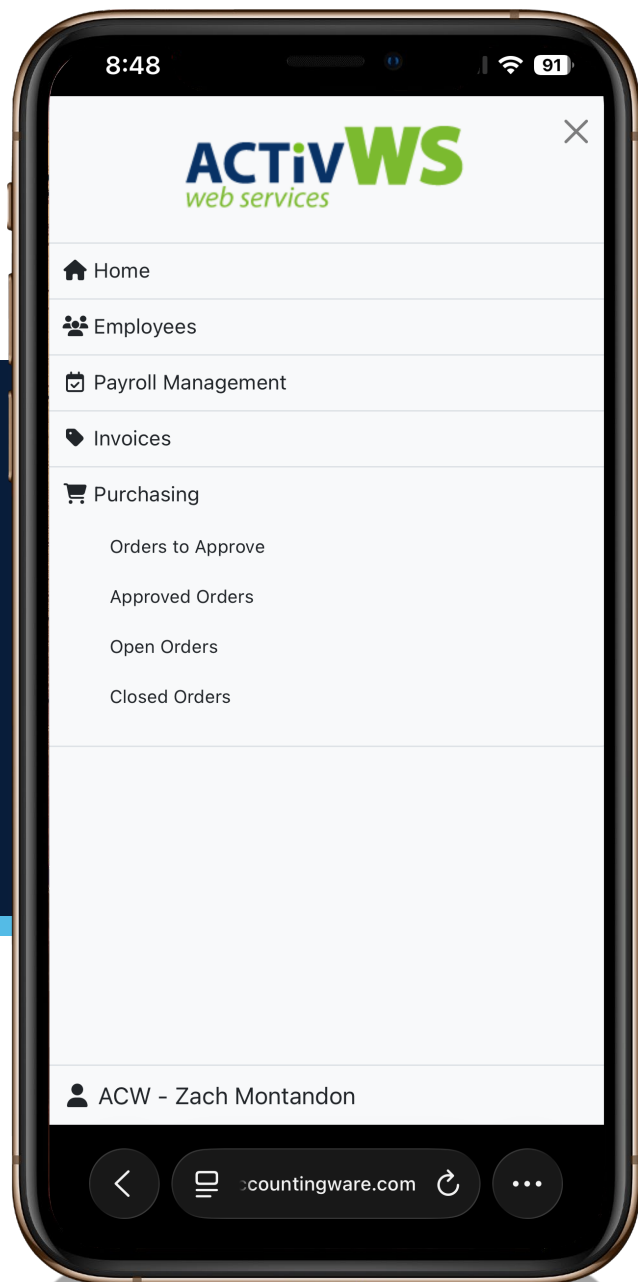
**Payment Terms**

Terms: Due: 6/22/2026 Basis: 416.12

Discounts: (none)

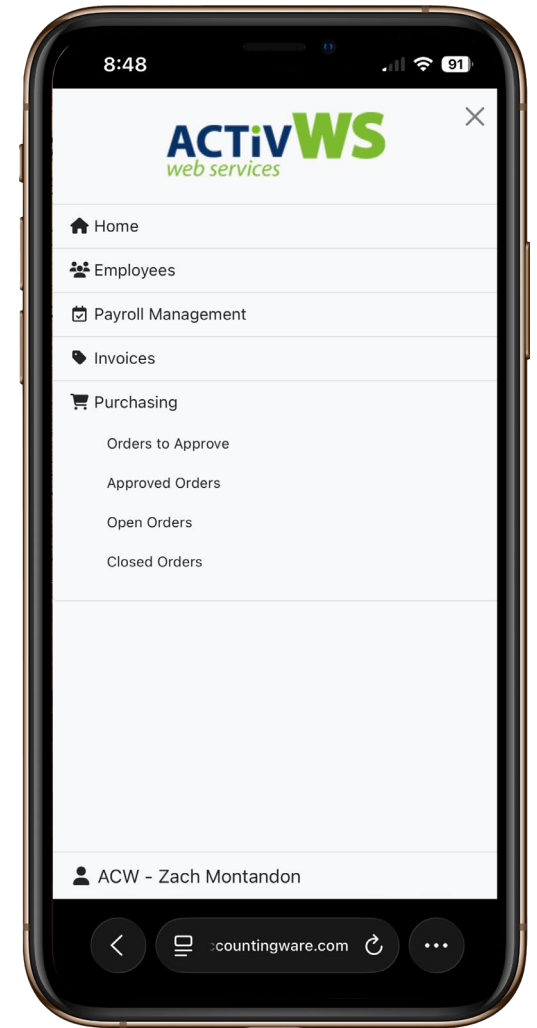
GL Detail

| Line | Source  | Account   | Account Description | Event | Debit | Credit | Unit | Description                   | Memo |
|------|---------|-----------|---------------------|-------|-------|--------|------|-------------------------------|------|
| 1    | Invoice | 2100-00-A | Accounts Payable    |       |       | 416.12 | \$   |                               |      |
| 2    |         | 5410-00-A | Office Exp,Corp     |       | 43.09 |        | \$   | OFFICE SERVICES - FACEBK *2E4 |      |
| 3    |         | 5410-00-A | Office Exp,Corp     |       | 92.57 |        | \$   | OFFICE SERVICES - FACEBK *XNK |      |
| 4    |         | 5410-00-A | Office Exp,Corp     |       | 69.83 |        | \$   | OFFICE SERVICES - FACEBK *X62 |      |
| 5    |         | 5410-00-A | Office Exp,Corp     |       | 77.25 |        | \$   | OFFICE SERVICES - FACEBK *B71 |      |
| 6    |         | 5410-00-A | Office Exp,Corp     |       | 70.41 |        | \$   | OFFICE SERVICES - FACEBK *2HF |      |
| 7    |         | 5410-00-A | Office Exp,Corp     |       | 62.97 |        | \$   | OFFICE SERVICES - FEDEX OFFIC |      |



# Self-Serve

- Mobile Accessible (based on local configuration)
- Included with Purchasing and Purchasing Lite
- Invoices Section
- Orders Section
- Navigation Updates



CASABLANCA

Powered By: **ACTIVWS**  
WEB SERVICES

Log in with SSO

Or

conetrix\zmontandon

.....

Log in

Use your username, email address, or domain  
credentials (i.e. conetrix\username)

[Create login](#)

[Forgot your password?](#)

# Login from any mobile device

ACTiVWS  
web services

Home

Payroll Management

Invoices

Purchasing

- Orders to Approve
- Approved Orders
- Open Orders
- Closed Orders

Open Orders

Lookup:

| Number                | Vendor               | Vendor Desc                | Dept      | Dept Desc       | Date       | Status | Description                |
|-----------------------|----------------------|----------------------------|-----------|-----------------|------------|--------|----------------------------|
| <a href="#">00103</a> | HomeDecor            | Home Decorators Collection | SvcLub    | Lubbock Service | 10/28/2014 | Master | holiday decor              |
| <a href="#">00111</a> | Koyal                | Koyal Wholesale Supplies   | SvcDallas | Dallas Service  | 10/20/2014 | Master | holiday decor              |
| <a href="#">00112</a> | Koyal                | Koyal Wholesale Supplies   | SvcLub    | Lubbock Service | 10/20/2014 | Hold   | holiday decor              |
| <a href="#">00113</a> | Koyal                | Koyal Wholesale Supplies   | SvcLub    | Lubbock Service | 11/8/2014  | Hold   | Miscellaneous Catering     |
| <a href="#">00114</a> | Koyal                | Koyal Wholesale Supplies   | SvcDallas | Dallas Service  | 11/20/2014 | Hold   | New Lighting               |
| <a href="#">00116</a> | Koyal                | Koyal Wholesale Supplies   | SvcLub    | Lubbock Service | 11/20/2014 | Hold   | New Lighting               |
| <a href="#">00117</a> | Koyal                | Koyal Wholesale Supplies   | SvcLub    | Lubbock Service | 12/2/2014  | Master | Miscellaneous Decor        |
| <a href="#">00122</a> | Petal                | Petals Plus                | SvcDallas | Dallas Service  | 3/22/2016  | Hold   | floral order for large job |
| <a href="#">00123</a> | Cake                 | Cake Creations             | SvcLub    | Lubbock Service | 4/6/2016   | Master |                            |
| <a href="#">00125</a> | Elite                | Elite Designs              | SvcLub    | Lubbock Service | 5/9/2016   | Master | Set Design for MIOGAW17    |
| <a href="#">00126</a> | Cake                 | Cake Creations             | SvcLub    | Lubbock Service | 5/10/2016  | Master | Cakes for May Birthdays    |
| <a href="#">00127</a> | Los Angeles Clippers | Los Angeles Clippers       | SvcLub    | Lubbock Service | 5/10/2016  | Master | Season Tickets             |
| <a href="#">00128</a> | Los Angeles Clippers | Los Angeles Clippers       | SvcLub    | Lubbock Service | 5/10/2016  | Hold   |                            |
| <a href="#">00130</a> | NQATIV               |                            | SvcLub    | Lubbock Service | 5/10/2016  | Master | NQATIV                     |
| <a href="#">00131</a> | Advertising Inc.     | Advertising Inc.           | SvcLub    | Lubbock Service | 5/10/2016  | Master | Advertising                |

Showing 1 to 16 of 99 entries

ACW - Zach Montandon

https://selfserve-implementation.accountingware.com/PO/Orders/Open

ActivReporter HelpHelp TextPassword PortalWS Self-ServeMy LastPass VaultAspireSwipeClockSwipeclock Support...AspireDocsChatGPTWS Demo Aspire Self...AzureTandemSignups - Summer...WorkforceHub Sug...

ACTiVWSweb services

HomePayroll ManagementInvoicesPurchasing

Orders to ApproveApproved OrdersOpen OrdersClosed Orders

Open Orders

Lookup:

| Number                | Vendor               | Vendor Desc                | Dept      | Dept Desc       | Date       | Status | Description                |
|-----------------------|----------------------|----------------------------|-----------|-----------------|------------|--------|----------------------------|
| <a href="#">00103</a> | HomeDecor            | Home Decorators Collection | SvcLub    | Lubbock Service | 10/28/2014 | Master | holiday decor              |
| <a href="#">00111</a> | Koyal                | Koyal Wholesale Supplies   | SvcDallas | Dallas Service  | 10/20/2014 | Master | holiday decor              |
| <a href="#">00112</a> | Koyal                | Koyal Wholesale Supplies   | SvcLub    | Lubbock Service | 10/20/2014 | Hold   | holiday decor              |
| <a href="#">00113</a> | Koyal                | Koyal Wholesale Supplies   | SvcLub    | Lubbock Service | 11/8/2014  | Hold   | Miscellaneous Catering     |
| <a href="#">00114</a> | Koyal                | Koyal Wholesale Supplies   | SvcDallas | Dallas Service  | 11/20/2014 | Hold   | New Lighting               |
| <a href="#">00116</a> | Koyal                | Koyal Wholesale Supplies   | SvcLub    | Lubbock Service | 11/20/2014 | Hold   | New Lighting               |
| <a href="#">00117</a> | Koyal                | Koyal Wholesale Supplies   | SvcLub    | Lubbock Service | 12/2/2014  | Master | Miscellaneous Decor        |
| <a href="#">00122</a> | Petal                | Petals Plus                | SvcDallas | Dallas Service  | 3/22/2016  | Hold   | floral order for large job |
| <a href="#">00123</a> | Cake                 | Cake Creations             | SvcLub    | Lubbock Service | 4/6/2016   | Master |                            |
| <a href="#">00125</a> | Elite                | Elite Designs              | SvcLub    | Lubbock Service | 5/9/2016   | Master | Set Design for MIOGAW17    |
| <a href="#">00126</a> | Cake                 | Cake Creations             | SvcLub    | Lubbock Service | 5/10/2016  | Master | Cakes for May Birthdays    |
| <a href="#">00127</a> | Los Angeles Clippers | Los Angeles Clippers       | SvcLub    | Lubbock Service | 5/10/2016  | Master | Season Tickets             |
| <a href="#">00128</a> | Los Angeles Clippers | Los Angeles Clippers       | SvcLub    | Lubbock Service | 5/10/2016  | Hold   |                            |
| <a href="#">00130</a> | NQATIV               |                            | SvcLub    | Lubbock Service | 5/10/2016  | Master | NQATIV                     |
| <a href="#">00131</a> | Advertising Inc.     | Advertising Inc.           | SvcLub    | Lubbock Service | 5/10/2016  | Master | Advertising                |

Showing 1 to 16 of 99 entries

ACW - Zach Montandon

8:4891

»Orders to Approve

☐ Include Master

Lookup:

| Number                | Vendor   | Vendor Desc         |
|-----------------------|----------|---------------------|
| <a href="#">00179</a> | ACS      | ACS Services        |
| <a href="#">00194</a> | Petal    | Petals Plus         |
| <a href="#">00195</a> | CoNetrix | CoNetrix Technology |
| <a href="#">00196</a> | CoNetrix | CoNetrix Technology |
| <a href="#">00199</a> | CoNetrix | CoNetrix Technology |
| <a href="#">00200</a> | Petal    | Petals Plus         |
| <a href="#">00202</a> | Amzn     | Amazon              |
| <a href="#">00219</a> | CoNetrix | CoNetrix Technology |

<

countingware.com

>

...

InterActiv

CONFERENCE



# Thank You!

CONNECT WITH OUR SPEAKERS AT [ACCOUNTINGWARE.COM/AGENDA](https://accountingware.com/agenda)