

Who approves what: an approval matrix you can fill in today

Dollar thresholds × department × category, plus escalation and delegation, so the owner only sees what's above their line.

Foxpedite does this automatically

A matrix in a spreadsheet tells people who should approve; it can't stop a purchase that skips it. Foxpedite routes every request by these rules:

- ✓ **The matrix becomes routing rules** in the visual workflow builder: amount × department × category.
- ✓ **Escalation timers and delegation** built in, so nothing waits on someone who's out.
- ✓ **Approve from the email**, with every step in the audit trail an auditor will ask for.
- ✓ **Draft-Stage Budget Lock**: approvers see the budget impact at the request, not at month-end.

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1-page guide to the Excel template

For controllers & owners

Worked example: 50 people (illustrative)

The example matrix (EXAMPLE DATA, illustrative)

Tier	Amount (total incl. tax + shipping)	Who approves	Quotes
T1	Under \$500	No approval; card or petty cash with receipt	0
T2	\$500 – \$2,499.99	Department head	0
T3	\$2,500 – \$9,999.99	Department head, then controller	2
T4	\$10,000 – \$49,999.99	Controller, then CEO	3
T5	\$50,000+	CEO + board / owners, signed contract	3

Category rules sit on top

Capex from \$2,500 jumps to T4 and adds the CEO. Software at any amount adds IT (security review; **annual** value counts). Contractors from \$1,000 need a W-9 and insurance on file. Grant-funded spend adds the grants manager.

FOXPEDITE AUTOMATES THIS each rule is one condition in the workflow builder.

Escalation

Waiting more than 24 business hours goes to the controller; 48 hours at controller level goes to the CEO. Write the timer down, or "pending" becomes a place purchases go to die.

FOXPEDITE AUTOMATES THIS the timer runs itself and moves the approval up.

Delegation (the vacation problem)

Every approver has a named backup and a dollar cap while covering. Out-of-office dates go in the table; the checker routes automatically for the purchase date.

FOXPEDITE AUTOMATES THIS delegation with a dollar cap is built in.

Four rules that make it work

- Nobody approves their own request.
- Splitting a purchase doesn't change the tier.
- Thresholds use total value, and annual value for subscriptions.
- People must be able to find the matrix in under 10 seconds.

TRY IT: APPROVAL CHECKER TAB

Example scenario: \$7,800 Operations equipment purchase → amount says T3, but the capex rule forces **T4**: controller + CEO, 3 quotes, capex form. Change the date to when the ops director is out and the checker names the covering approver and their limit.

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