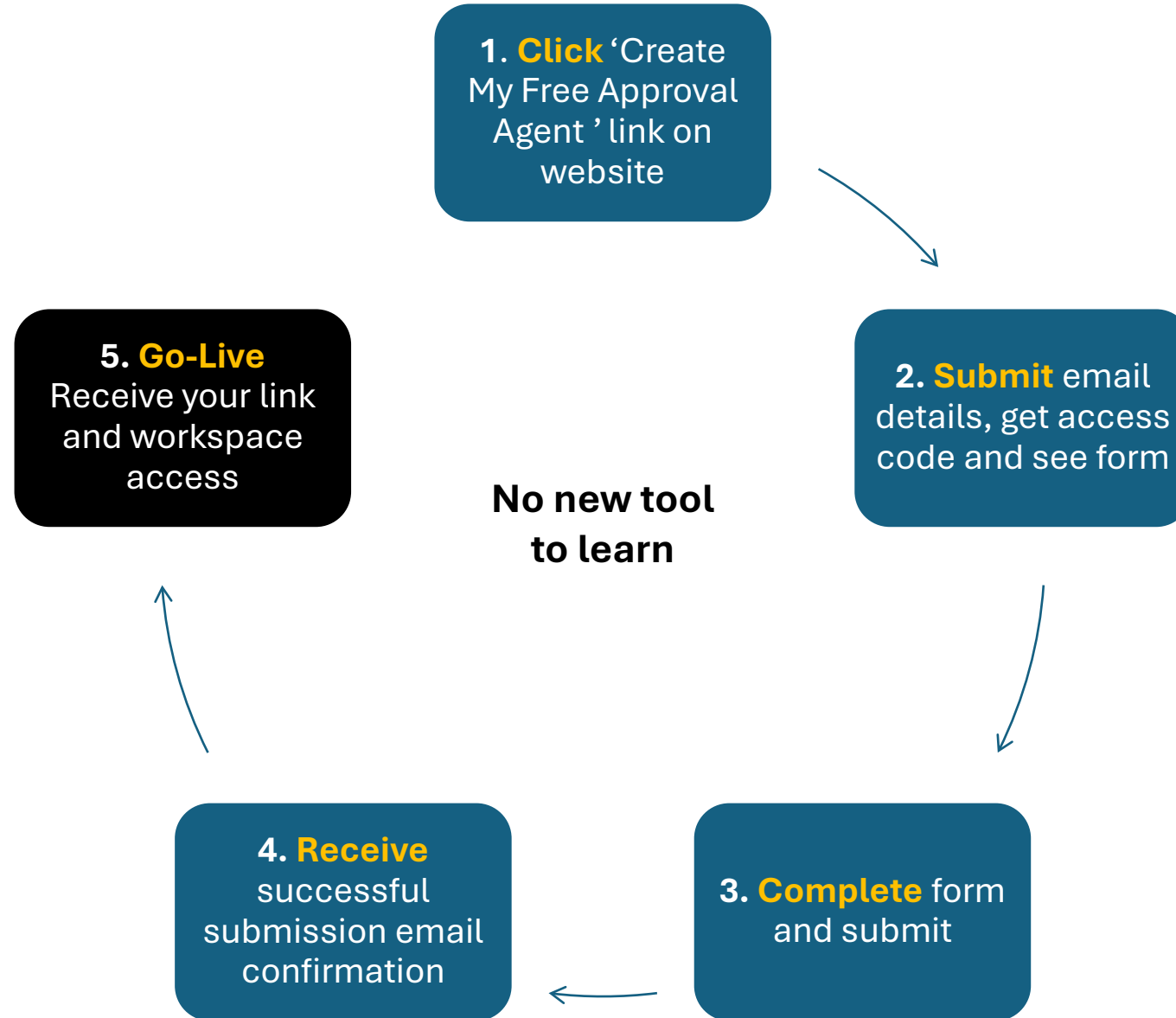


Setting up Your Approvals Agent



Meet Sarah - she completed her 'Create My Free Approvals Agent' form in 10 minutes and her branded approvals agent was live within the hour ...

**Setting up your
branded Approvals
Agent could not be
easier**



Sarah clicks the 'Create My Free Approval Agent' link on the website. Up pops the authentication link. Sarah follows the instructions, receives a unique access code by email and submits

Create My Approvals Agent

Description Create My Approvals Agent *



Create My Approvals Agent

Thank you for choosing 'The Approvals Agent'. Within 60 minutes of submitting the form you will receive (i) access to your workspace; and (ii) access to your workspace. This logo will be shown on the form used by your colleagues to take control of all your activity. If you upload your organizations company name will be on the form.

Unless specified, your unlimited usage agent will allow you to route approvals to different people. If you need more than one approver or if you want to route approvals to different people, please contact us via hello@ask.kim to discuss your requirements (however complex). Choose 'Approvals Agent Plus' if you want more detailed data and complete control, select 'Approvals Agent'.

You are one hour from joining the

Section 1: Your Details

(i) Your Name *	(ii) Your Role *	(iii) Your Email *	(iv) Date of Request *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="August 05, 2025"/>  

User Access

Welcome to 'Create My Approvals Agent'. We take protecting your data seriously. Enter your email & follow the instructions to request an access code.

Email Address: *

Up pops the 'Create My Free Approval Agent' form

Create My Approvals Agent

Description

Create My Approvals Agent*

Create My Approvals Agent

Thank you for choosing 'The Approvals Agent'. Your answers to the questions below will be used to create your branded agent. Within 60 minutes of submitting the form you will receive: (i) the weblink that you can share with your colleagues to take control of all your approvals; and (ii) access to your workspace so that you or your named person can track all activity. If you upload your organizations logo this will be shown on the form used by your colleagues. If you do not upload a logo your company name will be on the form.

Unless specified, your unlimited usage agent will be in English. This free version allows one approver. If you need more than one approver or if you want to route approvals to different people (i.e. HR requests to HR, sales requests to MD ... etc) please contact us via hello@ask.kim to discuss your requirements (however complex Approvals Agent can manage it). Please select the approval workflow you want. Choose 'Approvals Agent Plus' if you want more detailed data and reporting. If you want a very simple user experience with fewer questions, but still retaining complete control, select 'Approvals Agent'.

You are one hour from joining the fast growing 'Approvals Agent Club'!

Section 1: Your Details

(i) Your Name

*

(ii) Your Role

*

(iii) Your Email

*

(iv) Date of Request

*





August 05, 2025

Submit

Cancel

**Sarah
completes
section 1
of the form**

Create My Approvals Agent



Description

Create My Approvals Agent*

your requirements (however complex Approvals Agent can manage it). Please select the approval workflow you want. Choose 'Approvals Agent Plus' if you want more detailed data and reporting. If you want a very simple user experience with fewer questions, but still retaining complete control, select 'Approvals Agent'.

You are one hour from joining the fast growing 'Approvals Agent Club'!

Section 1: Your Details

(i) Your Name*

Karl Chapman

(ii) Your Role*



Finance Director

(iii) Your Email*

karl.chapman@kimtechnologies.com

(iv) Date of Request*

August 05, 2025



(v) Company Name*



Kim Technologies Inc

(vi) Your Country*

United States|

(vii) To Protect Your Data, in Which Country Do You Want Your Data Stored?*

USA



Section 2: Information Required

(i) Please list the departments / functions that your teams work in*

Submit

Cancel

5

Sarah completes section 2 and submits

Create My Approvals Agent

Description

Create My Approvals Agent

Karl Chapman

karl.chapman@kimtechnologies.com

(iv) Is the Workspace User (the person who can see all requests made) the same person as the Approver?

Yes

(vii) What do you want to call your Approvals Agent?

Approvals Assistant

(viii) Choose your language

English

(ix) Have you uploaded a logo?

Yes

(x) What is your website URL?

www.kimdocument.com

(xi) Do you want 'Approvals Agent' or 'Approvals Agent Plus'?

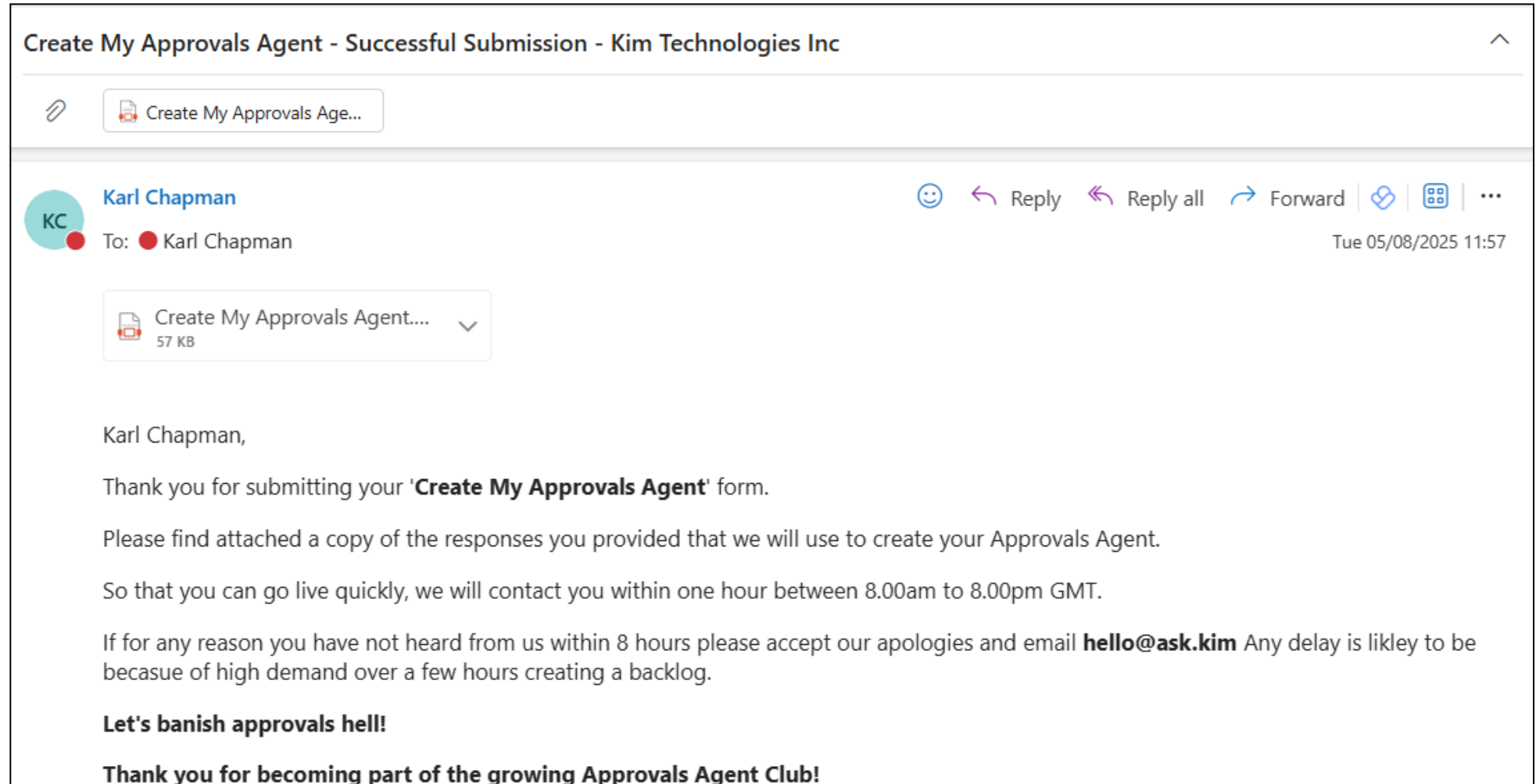
Approvals Agent

Nearly there! Please submit. You will receive a successful submission email with a copy of your responses for your records. We will be in touch soon with your Agent. Welcome to a simpler world!


Submit


Cancel

**Sarah receives
an email
confirming
successful
submission**











Within an hour Sarah receives the details that take her Approvals Agent live

Your Approvals Agent is Ready to Use!  Restricted



Karl Chapman

To:  Karl Chapman

 Reply Reply all Forward

Tue 05/08/2025 12:06

Karl Chapman,

Please find attached a briefing document that contains:

1. A link to your branded Approvals Agent
2. A draft email that you can use to distribute this Agent link to your staff for their use
3. A user guide for your team (although no training is actually required)
4. Guidance on how you can use the Approvals Agent workspace to monitor and report on all approval request sand decisions

By separate email you will also receive an invitation to your Approvals Agent workspace (see the attached guidance).

If you have any issues or questions please email hello@ask.kim

Welcome to the Approvals Agent Club!

Invisible Solutions. Visible Results.
The Task Automation Platform

It is that simple ...



and everyone is happy!