

CLIQO OVERVIEW

Approvals for Business Central, done in Microsoft Teams

Cliqo is an approval engine for Microsoft Dynamics 365 Business Central. Invoices, requisitions and expenses are approved in Microsoft Teams, and the approved documents integrate back into Business Central automatically. People who only submit or approve don't need a Business Central licence.

Four modules, one approval engine

01

Requisitions
Staff raise requisitions in Cliqo. Once approved they are created as Purchase Orders in Business Central, and receipts post G/L accruals that reverse on invoice.

02

Expenses & Corporate Credit Cards
Receipts captured on a phone, corporate card statements completed by each cardholder, and approved claims created as Purchase Invoices.

03

Invoice Approval
Purchase Invoices and Credit Memos from Business Central or Cliqo, routed by your rules and signed off in Microsoft Teams.

04

Invoice Capture NEW
Part of Invoice Approval. Email or upload supplier invoices and Azure AI Document Intelligence creates the Purchase Invoice or Credit Memo.

Coming soon: Timesheet Approval, through the same engine.

How it fits together

In Cliqo	Approved in	Lands in Business Central as
Requisition	Microsoft Teams or email	Purchase Order
Goods or services received	-	G/L accrual, reversed on invoice
Expense claim or card statement	Microsoft Teams or email	Purchase Invoice
Supplier invoice or credit note	Microsoft Teams or email	Purchase Invoice or Credit Memo

The Cliqo Workflow Engine

Every module runs on the same engine. Build your approval rules once, from simple sign-off limits to line-level budget checks, and they work across requisitions, expenses and invoices.

Easy to use

No more fighting with Business Central's workflows. Build rules in minutes and drag them into order.

Rules on line details

Route each line by its dimensions, such as department or project, as well as amounts, budgets and your own groupings.

Test before go-live

Run a workflow end to end without notifying real approvers.

The whole app in Teams

Approve, and browse Cliqo itself, without leaving Microsoft Teams. Email approvals too.

No Business Central licence

Unlimited approvers, synced straight from Microsoft Entra ID.

Multi-company & multi-currency

One setup across your companies and environments.

Why finance teams choose Cliqo

- ✓ **Lower licence costs.** Occasional approvers don't need Business Central licences.
- ✓ **Faster approvals.** Requests reach people in Microsoft Teams, where they already work.
- ✓ **Accurate month-end.** Accruals post on receipt and reverse on invoice automatically.
- ✓ **Less keying.** Invoice Capture creates supplier invoices from PDFs.
- ✓ **Up and running in hours.** A guided setup connects Cliqo to your tenant.

Security & hosting

- ✓ Hosted in the UK, GDPR compliant.
- ✓ Sign-in with OAuth 2.0 through Microsoft Entra ID.
- ✓ All communication over TLS 1.2+.
- ✓ Role-based access control and audit logs.
- ✓ Full details at cliqo.co.uk/trust-centre.

Pricing

A monthly platform fee covering all modules, plus a fee per completed transaction with volume discounts applied automatically. One sandbox environment is always free. Current prices: cliqo.co.uk/pricing.

See Cliqo with your own scenarios

Book a 30-minute demo, or start with one free sandbox environment.

cliqo.co.uk/book-a-demo