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Acumatica
The Cloud **ERP**

Preferred Partnership
Ottimate AP Automation AI
For Acumatica

Agenda

How We Differentiate

AP Automation Overview

Capabilities Overview

VendorPay

Integrations

FAQs

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Ottimate's *always* talking with Acumatica.

With an API integration connecting Acumatica and Ottimate, you can be sure that your systems are always in sync.

Never backfill an accounting or AP system again.

Providing:
- deep integration capabilities
- detailed mapping
- and source documentation links

Ottimate keeps everything up-to-date in both directions.

"When I started at Tender Greens, our AP department had three people. Today, even as our business grew from 17 to 24 locations, Ottimate has cut our bookkeeping costs in half — and allowed us to move forward with an AP team of just one employee."

Sean Skuro,
VP of Finance and Accounting, Tender Greens

A Superior User Experience

Click Here: <u>Read The Case Studies</u>

We're an AP-user-first company

According to over 100+ G2 customer reviews, Ottimate offers:

- Industry-inclusive solutions
- Easiest admin & implementation
- Superior product support
- Seamless integrations
- Comprehensive feature updates
- Confidence in AP accuracy

Serving every industry:
Restaurants, Construction, Hospitality, Healthcare, Retail, Automotive, Manufacturing, Accounting & Bookkeeping & more.

Better AP is our First Priority

More than OCR: AI Powered AP
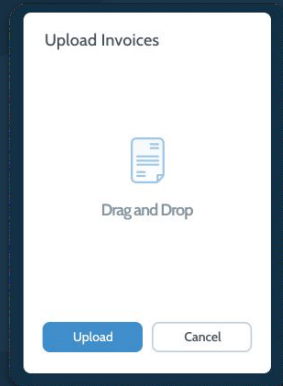- AI powered machine learning
- Deeper, more intuitive automations

In-Demand Features
- Three way PO matching
- Multi-entity management
- Instant capture
- Line-item accuracy
- VendorPay
- No charge for new users
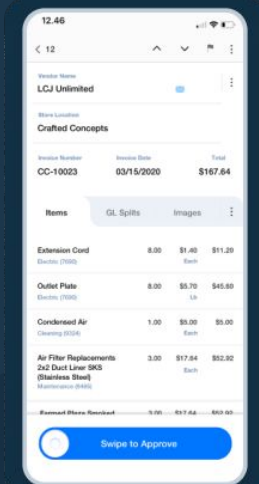- Learns your AP process and improves

Process Automation
- Automatic approval escalation
- Custom workflows
- Multiple dimensions
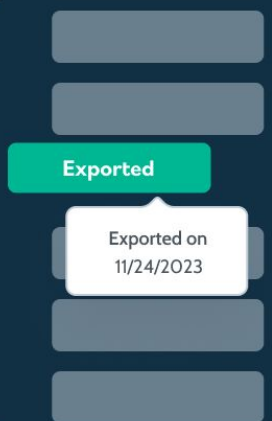- Seamless Acumatica integration via API

Upload   **Manage**   **Sync**

Upload Invoices

Drag and Drop

Upload   Cancel

12.46
< 12
Vendor Name
LCJ Unlimited
Store Location
Crafted Concepts
Invoice Number | Invoice Date | Total
CC-10023 | 03/15/2020 | $167.64

Items   GL Splits   Images

Extension Cord | 8.00 | $1.40 | $11.20
Electric (7000) | | | Each

Outlet Plate | 8.00 | $5.70 | $45.60
Electric (7000) | | | Lb

Condensed Air | 1.00 | $5.00 | $5.00
Cleaning (1024) | | | Each

Air Filter Replacements | 3.00 | $17.64 | $52.92
2x2 Duct Liner 5KS | | | Each
(Stainless Steel)
Maintenance (845)

Swipe to Approve

Exported

Exported on
11/24/2023

Simply upload, manage and sync
invoices to Acumatica.
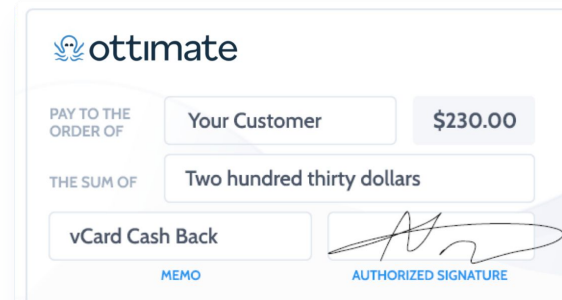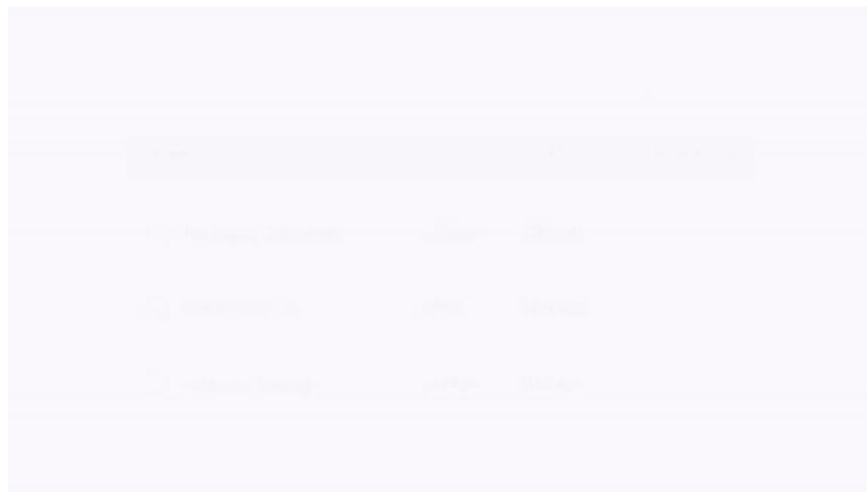
VendorPay

ACH Transfers

Send Payments electronically directly to your vendors' bank via standard or enhanced ACH

Paper Checks

Stop manually handling checks Ottimate prints & sends checks on your behalf

Virtual Cards

Pay your vendors seamlessly & earn cashback with vCards

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Unlimited Customization.
Unmatched Accounts Payable Processes.

Approvals & Routing
Create approval workflows of any complexity, based on any dimension, with access to a complete audit history

GL-Mapping
Map invoice items to your chart of accounts once, after that, Plate IQ will code them correctly to your GL

AI & Machine Learning
Leverage smart technology that learns your business, with line-item digitization & predictive coding

Instant Capture
Upload invoices & get header data & line-item details such as product, cost, & quantity digitized - instantly

Digital Filing Cabinet
Access any invoice, payment, or approval with a searchable database of your AP history

Multi-Entity Management
Gain oversight to multiple locations when it comes to invoice automation and management

ERP Integration
Sync accurate & timely invoice & payment data directly to your ERP, saving teams an average of 450 hrs a year

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Frequently Asked Questions

Q: Does Ottimate support Acumatica's branch and project accounting features?
A: Yes, Ottimate integrates seamlessly with Acumatica, supporting its branch and project accounting features for comprehensive financial management.

Q: Does the integration automatically sync newly added vendors and items?
A: Vendor and item records are synced dynamically from Ottimate as invoices containing the relevant details flow through for processing.

Q: Can custom transaction types in Acumatica be mapped?
A: Yes, we can customize our integration to push details into custom transaction types configured within Acumatica.

Q: What about custom fields and data structures?
A: Our flexible API can be customized to send, receive, and map details into your custom Acumatica fields and data configurations.

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How We Work Support

- ✓ Partner enablement designed to give you everything you need to promote Ottimate.

- ✓ Co-branded marketing opportunities to introduce clients to both brands and services.

- ✓ Partner Portal Access with robust resources and on-demand content.

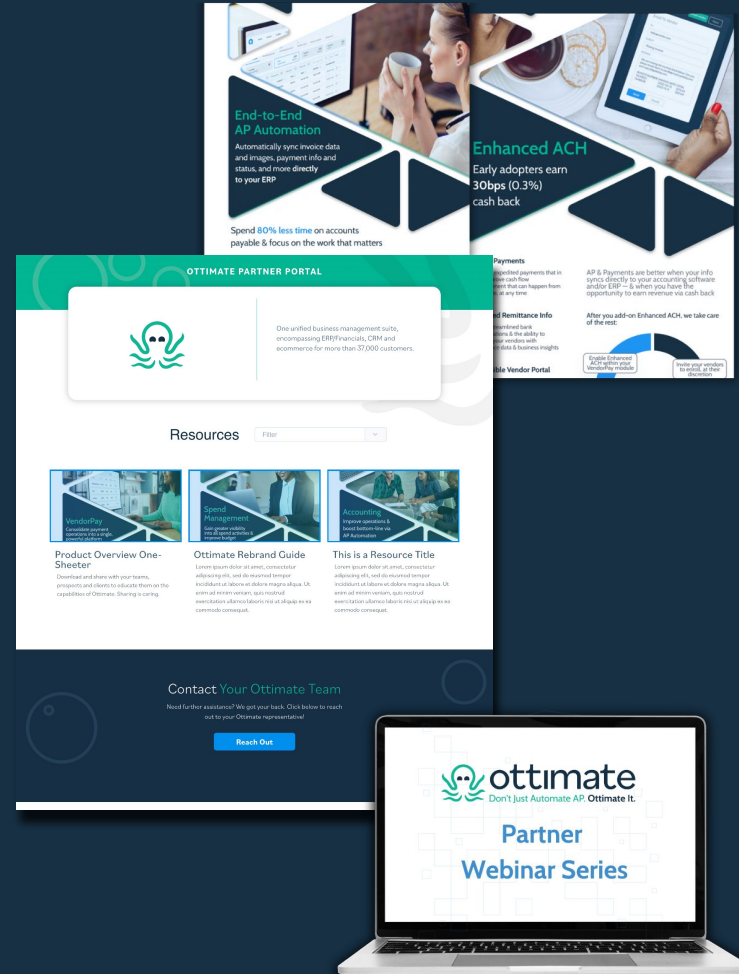- ✓ Sales alignment built for early and sustainable success

The Team Behind You

- Experienced **Partner Manager**
- Dedicated **Channel Marketing Manager**
- Assigned **Sales Enablement Manager**
- Extensive **Technical and Sales Support**
- Joint Go-to-Market Planning
- Sales Enablement Sessions & Collateral
- Meetings and QBRs for consulting and strategy sessions
- Continued Education through new releases and updates

Marketing Support & GTM Strategy

- ✓ Sales Enablement/Training and Support

- ✓ **Coming Soon:** Portal to branded marketing resources

- ✓ Social Announcements and Events

- ✓ Brand inclusion in Ottimate marketing

- ✓ Dedicated content support for partners

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Don't Take Our Word For It.

Hear it from our partners!

Recognizing the need to provide customers with invoice processing and AP solutions, we wanted to partner with a leader in this industry. Ottimate has a strong track record in this domain and through creating a distinctive, seamless integration between our two systems, we can guarantee that our customers benefit from superior software."

Co-Founder
opsi

From invoice automation to paying vendors, Ottimate makes it seamless, compliant and effortless. Our clients who use Ottimate grow larger businesses because they spend more time on the activities that keep customers coming back! I recommend it wholeheartedly if you are a start up or mature business.

CEO
Franchise Consulting Group

"In our short time together so far we have all gotten on calls to work through our partnership agreement, deliver good demos, discuss incentives to close deals, discuss participating at trade shows,... You guys have been absolutely fantastic to work with and it has been a refreshing change from our other vendors."

Director
Acumen

CARDENAS | double Kwik | IGA | SPROUTS FARMERS MARKET | Foodtown Shop Foodtown. That's Smart! | FLORES | Holiday Inn | W HOTELS | WHG | Graduate HOTELS | CAVA Mezze Grill | TORCHYS