



Spend Essentials

Maximize the value of every dollar spent with Ottimate’s Spend Essentials. Whether you’re buying in bulk or looking for a solution to ensure your utilities are paid on time, every time, Spend Essentials provides you with the tools you need — without the extras you don’t.

What is Spend Essentials?

Spend Essentials is a simple solution that covers incidental payments, issues a location or department card to manage these charges effectively, uses spend to make a one time purchase or to cover recurring transactions that employees may make to avoid reimbursements, and controls expenses by choosing how and what your employees or teams can spend money on — all from your Ottimate system.

Ottimate can help out with more than just your incidental payments. By combining the power of Spend Essentials with VendorPay, you can track and make all your payments in one platform. Whether you are paying an invoice directly on a vendor portal, or covering an employee expense, virtual cards can cover the cost.

The screenshot shows the Ottimate web interface. At the top, there's a navigation bar with 'Home', 'Cards', 'Transactions' (selected), and 'Users'. A user profile for 'Elaine' is visible in the top right. Below the navigation is a search bar for 'Spend Essentials' with a search icon and a 'Filter' button. An 'Export' button is also present. The main content area displays a table of transactions with columns for Date, Merchant, User, and Amount (USD). The table contains four rows of data, with the third row highlighted in green. To the right of the table, a detailed view of the highlighted transaction is shown, including the amount '\$185.99', merchant 'IT Services', a receipt icon, and a 'View Receipt' button. Below this, the status is 'Posted' on '07/25/2024 7:45AM' and the merchant category is 'Computer & Technology'.

Date	Merchant	User	Amount (USD)
7/27/2024	Office Supplies	Elaine M.	\$287.89
7/27/2024	Software Service	Elaine M.	\$55.42
7/27/2024	IT Services	Elaine M.	\$185.99
7/27/2024	Linens Co.	Elaine M.	\$250.10

Eliminate Manual Expense Tracking

Issue corporate cards for any employee and empower them to upload receipts and track mileage from anywhere, effectively eliminating the need to manually track expenses.

Control Spend

Set spending limits and establish complex and precise approval rules based on user, transaction price, merchant, etc.

Real-Time Notifications

Receive real-time notifications as purchases are being made, and request receipts from employees, directly from the app.



Key Benefits of Spend Essentials

Save Time

Spend fewer valuable work hours manually adding incidental spend or petty cash payments to your accounting systems. When you use Ottimate cards, either physical or virtual, those transactions will be automatically tracked and synced with your ERP.

Gain Greater Control Over Spending

With Ottimate you will have visibility and control over the entire expenses management lifecycle. You can create virtual cards for any expense, track spend by department, monitor transactions in real time, set spending limits, and more.

Experience Seamless ERP Integration

With in-app vendor communications & fast, more efficient payment processing, your vendors get paid on time, every time.

Use One Platform For All Your Payments

By combining the power of Spend Management Essentials with VendorPay, you can track and make all your payments in one platform — whether you're paying an invoice directly on a vendor portal, or covering an employee expense on a virtual card.

Easily Pay Recurring Expenses and Bills

Spend Essentials makes it easy to set up recurring cards that automatically reload a preset amount on a monthly or annual basis to be used for recurring expenses that can include: utilities, platform fees, subscriptions, card on file vendors, and more.

A Smarter Corporate Purchasing Card

The Ottimate Card uses AI, mobile technology, and mint-condition transaction data to streamline accounting.

Experience the benefits of having greater visibility and control into company spend, improving budget management, while making it easier for employees and staff to cover incidental payments, issue a location or department card to manage these charges effectively, use spend to make a one time purchase or to cover recurring transactions that employees may make to avoid reimbursements — all from within the Ottimate system.

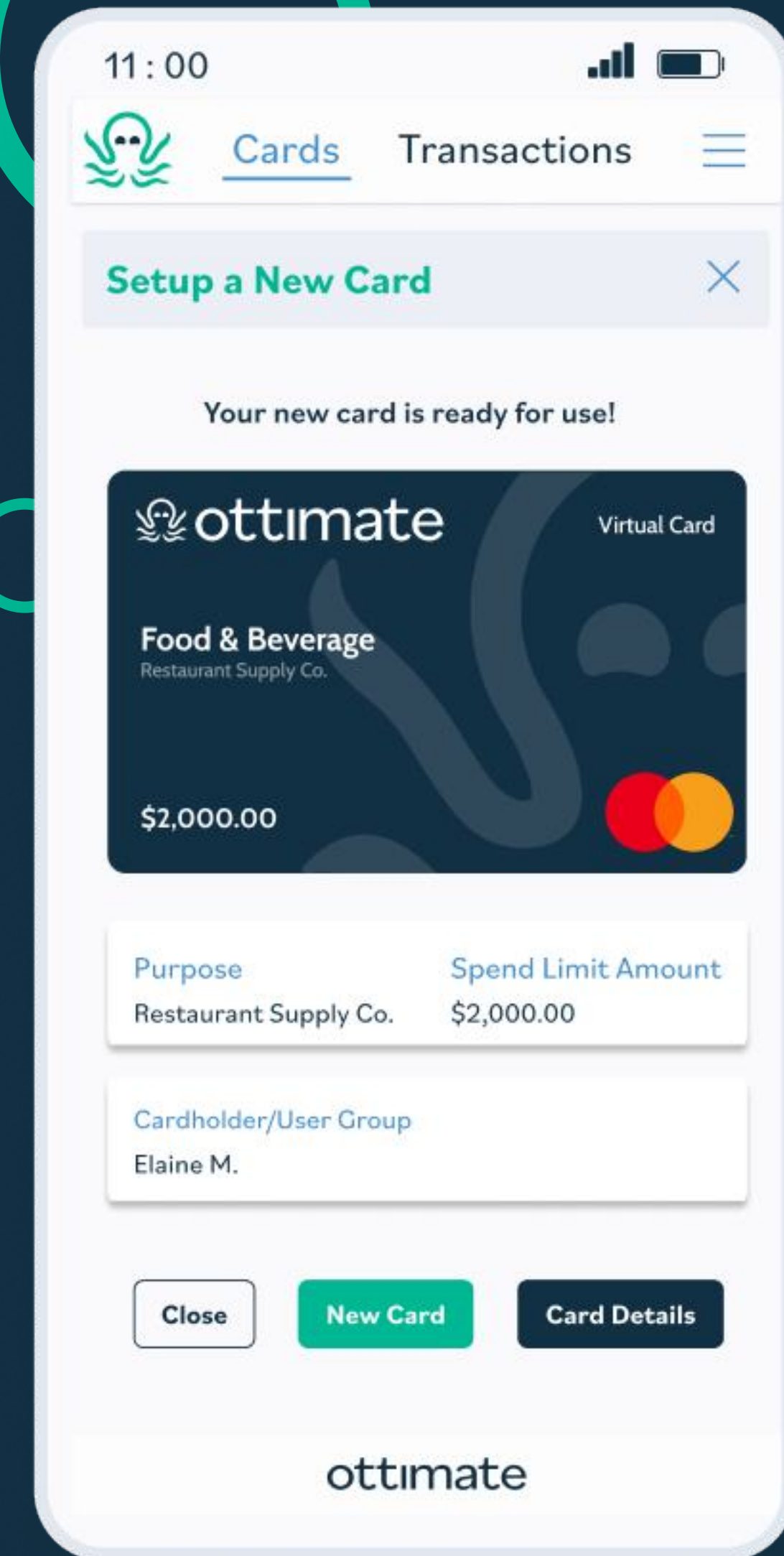


Virtual Cards

Virtual cards offer a secure and convenient way to make payments without the need for physical credit cards. Virtual card payments streamline accounts payable processes, reduce the risk of fraud, and enhance security for your transactions.

Virtual Cards for Corporate Spend Benefit the Entire Team

- ✓ **For Controllers**
Issue and edit cards on-demand to start controlling your spend before it happens.
- ✓ **For Employees**
Enjoy all the convenience of a corporate card, anywhere you use a card.
- ✓ **For Everyone**
With The Ottimate Card, any business can set up a corporate expense card program.



Integrate With any Accounting System or ERP

Here are just a few of the systems we integrate with:



Our Reviews Speak for Themselves

“I like that it is very easy to use and navigate through. I like the dashboard, as it breaks down all bills into different categories. There are reports you can download and view to track your spending.”

Nicole P.

The image displays three G2 award badges in a row, each with a G2 logo at the top. The first badge on the left says "Users Love Us" with a star below it. The middle badge says "Easiest To Do Business With Enterprise" with "FALL 2024" below. The rightmost badge says "High Performer" with "FALL 2024" below. A green button at the bottom right says "Visit G2".

Customer Success Stories

Don't Take Our Word For It

Hear what our clients have to say!



Having all of the information in one place, including statement, invoices, images, and account details, has been life changing for all positions.

The amount of work time saved in our stores has created much more opportunity for growth and new tasks.

Caroline G.
G2 Verified, Mid-Market User



Most corporate cards out there don't work for us because of stringent cash balance requirements.

Ottimate's corporate debit cards are way simpler. I can issue one with a single click, control the card's rules myself, and monitor all of my purchase activity in real time.

Jake Vandermeer
CFO, Clutch Coffee



Clean and easy view of all expenses.

I can see every invoice in a library on my phone at an instant... so many problems resolved by this!

Toby S.
Owner, Hospitality



Next Steps

Ready to get started with
Spend Essentials?

[Book a Demo](#)

Have any questions? Please reach out
to the Ottimate team:



www.ottimate.com

