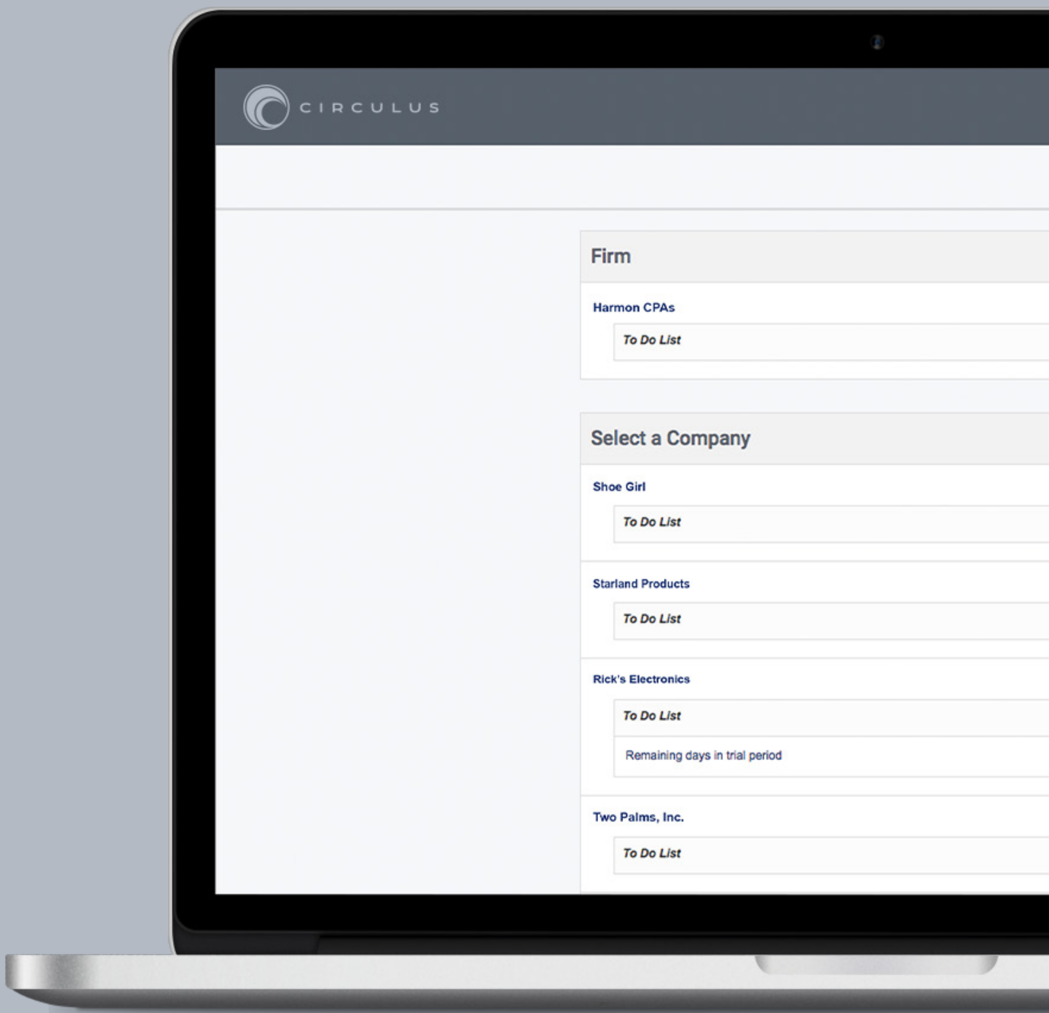
C I R C U L U S

ACCOUNTANT PROGRAM 2017



OVERVIEW

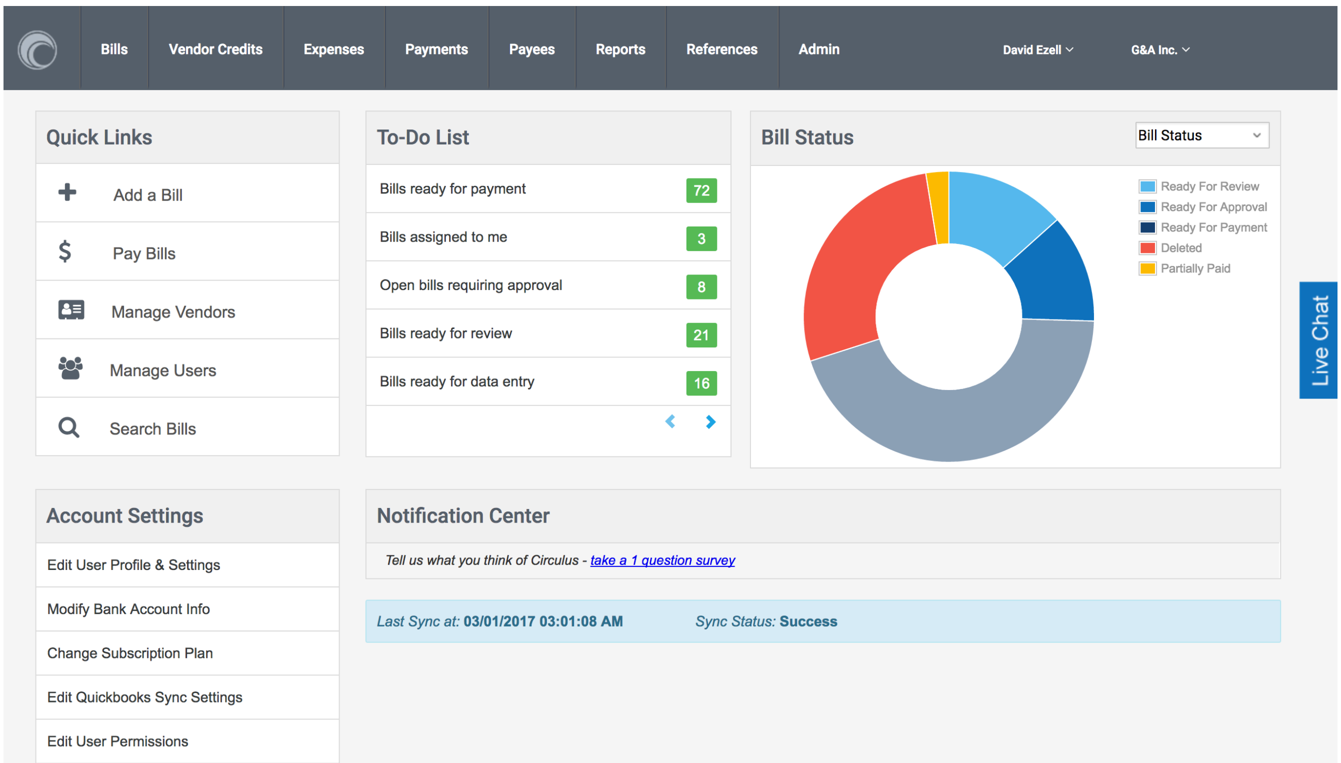
We understand that accounting professionals are always on the lookout for ways to enhance client value.

What We Add

- Easy access to our AP platform
- Scalable and affordable technology
- Various workflows that provide controls
- ACH/Check bill payment automation
- Detailed audit trails providing transparency
- Unlimited electronic document storage and management

What We Remove

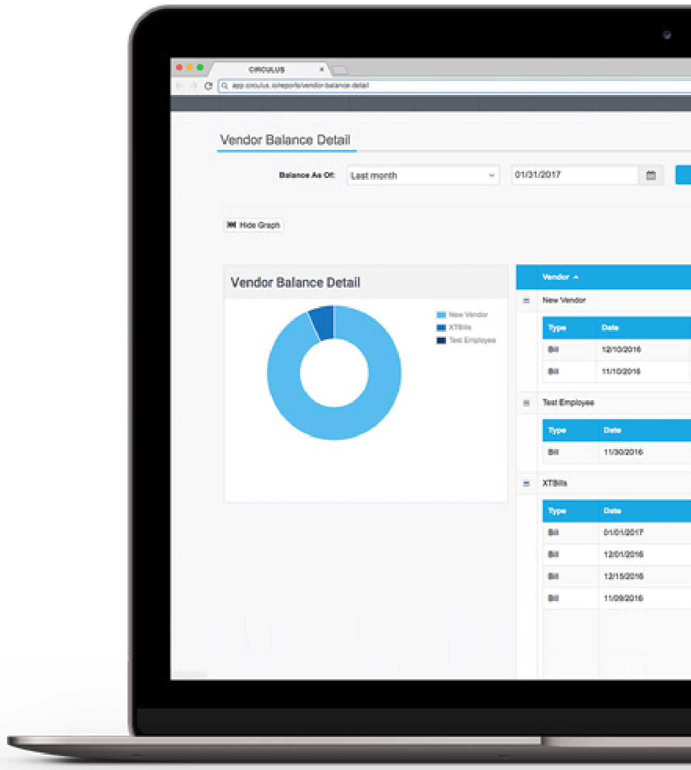
- A grueling manual paper process
- Various fraud risk at the bill and vendor payment levels
- Poor time management
- Archaic business practices by providing cloud-based technology



WORKING. BETTER.

Your clients look to you for guidance and expertise.
With cloud-based automation, the benefits are not only many,
but also easily demonstrable to your clients.

- Eliminating confusion and discrepancies with auto-detection of duplicate invoices
- Providing multiple workflow options per client, allowing the ability to assign the best fit for their particular needs
- Assigning and delegating bill review, approval and payment process per client user type
- Providing an enormous amount of granular audit data, including time-stamped records of any and all actions applied to vendor and bill data



The Result?
Benefits For Both You And Your Clients

1

Upgrades
No need for upgrades, as Circulus is a SaaS solution.

2

Visibility
By increasing visibility and 24/7 access to client data, process bottle-necks, inaccuracies can be virtually eliminated.

3

Ease of Use
Easy audit trail tracking, clean books, and the ability to easily scale your client's business.

BENEFITS

What makes us tick.

From setting strategic goals and objectives, to communicating frequently, we are dedicated to providing you with a variety of benefits.

BENEFITS	
Easy integration with both QuickBooks Desktop and QuickBooks Online	✓
Simple implementation with multiple account sync options	✓
Complimentary support for both you and your clients	✓
Product & road-map communication	✓
Dedicated team training	✓

We're Here for You

Help is only a call, click, or email away. Our dedicated support team is available Monday-Friday, 9am - 5pm Central Time. In addition, our robust Knowledge Center is full of helpful tips, user guides and instructional videos designed to get you up and running with Circulus in no time.

- ✓ **Live Chat**
- ✓ **Toll-Free Support**
- ✓ **Email Support**
- ✓ **Complimentary Onboarding**

GETTING STARTED

We want to make onboarding as easy as possible.
This handy checklist should help you get started.

FIRST THINGS FIRST

- [ ] Decide who will ultimately take ownership of the Circulus account
- [ ] Integrate your client's QuickBooks account
- [ ] Set your QuickBooks Sync settings
- [ ] Define your Workflow settings and create your Circulus inbox ID
- [ ] Have that user complete the ID verification and set-up the company bank account

WORKFLOW SETUP

- [ ] Invite vendors to register their bank account for ACH payments
- [ ] Adjust any configurable user permissions to fit requirements for user roles
- [ ] Add any users who will need access to Circulus and set their permissions

TESTING

- [ ] Create your first bill in Circulus, and perform a manual sync
- [ ] Check the QuickBooks account and confirm that the newly created bill synchronized
- [ ] After paying your first bill, sync and verify that the payment ID appears in the memo field of the payment details in QB
- [ ] Generate an “Unpaid Bills” report in the Client’s QuickBooks account, and cross-reference the reported bills with the bills that synced in Circulus
- [ ] Cross-reference the first bill payment information listed in Circulus with the payment information in your Client’s QuickBooks Account

ONGOING MANAGEMENT

- [ ] Pay any partially paid bills that do not sync from QuickBooks initially outside of Circulus
- [ ] Forward bills to your bill inbox

PRICING

Per Subscription

$20.50

For Unlimited Users,
Accountants log-in
at no cost

TRANSACTIONAL FEES

Check Payments $1.39/each

Pay using physical checks, including Positive Pay security and in-depth remittance detail.

ACH Payments $0.45/each

Quick, affordable and secure; ditch the checkbooks and take advantage of the many benefits of ACH payments.

Data Entry Services $0.99/bill

Data entered with 99% accuracy by 9:30AM CST the next business day.
*Per bill, maximum of 5 line items with itemization is requested.

Accounting Software Integration Included

Integrate your Circulus account with your QuickBooks Desktop or QuickBooks Online account.

WE **ARE** AUTOMATION

CIRCULUS

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