

Certified Public Accountants  
Business & Financial Advisors



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**Accounts Payable Automation**

# Housekeeping

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Zoom Video Conferencing was Named a 2018 Gartner Peer Insights Customer's Choice for Meeting Solutions

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**Gartner** Zoom received a 4.69 out of 5 overall customer rating

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Q&A

You asked: 19:41  
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**Figure 1. Gartner Peer Insights "Voice of the Customer" Meeting Solutions Overall Ratings**

Gartner Peer Insights "Voice of the Customer" Meeting Solutions Overall Ratings  
As of January 31, 2018

Eligible Vendors	Gartner Peer Insights Customers' Choice	Gartner Magic Quadrant Position	Number of Reviews	Overall Customer Rating
Zoom Video Communications	customer's choice 2018	Leader	n=686	4.69
Highfive Technologies			n=30	4.40
Lifesize			n=30	4.40
LogMeIn	customer's choice 2018	Challenger	n=163	4.36
Teamviewer			n=42	4.33
BlueJeans Network	customer's choice 2018	Visionary	n=57	4.32
Google	customer's choice 2018	Challenger	n=131	4.27
Cisco	customer's choice 2018	Leader	n=380	4.21
Microsoft		Leader	n=293	4.16
Adobe		Challenger	n=72	4.14

Notes: Vendors with greater than 25 reviews on Gartner Peer Insights in the past one year as of January 31, 2018 are considered eligible vendors. Gartner Peer Insights Customers' Choice announced on February 13, 2018. Gartner Magic Quadrant for Meeting Solutions published on September 18, 2017. Number of reviews and ratings as of January 31, 2018. ©2018 Gartner Inc. All rights reserved.

Source: Gartner Peer Insights (January 31, 2018)

Mean overall rating for eligible vendors in this specific market: 4.33



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# Presented By

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Manager  
Insero & Co. CPAs, LLP



# Polling Question 1

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Did you streamline your bill payment process during the pandemic?

# What's your current process?

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- Do you experience lost time hunting for missing invoices throughout the year or during the annual audit?
- Are your books out-of-date or do they require cleanup?
- Is your process manual, slowed by chasing required approvals and signatures?
- Are segregation of duties in place?

# Is your current process putting your business at greater risk for fraud?

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- ↗ Paper checks
- ↗ No defined workflow
- ↗ Sharing banking account login information
- ↗ Ignoring fraud prevention tools

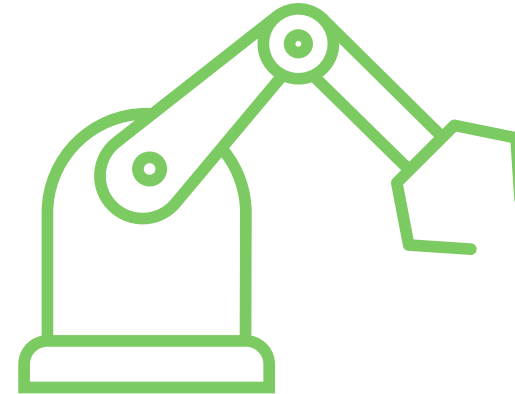




# Automation can help prevent fraud

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- Paperless payment methods
- Bill approval workflows and user permissions
- Separation of duties defined by user roles
- An always on audit trail



# Insero & Co. CPAs LLP and Automation

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BILL formerly Bill.com is just one of the automated solutions Insero uses to help our clients streamline the complexities around their bill management needs



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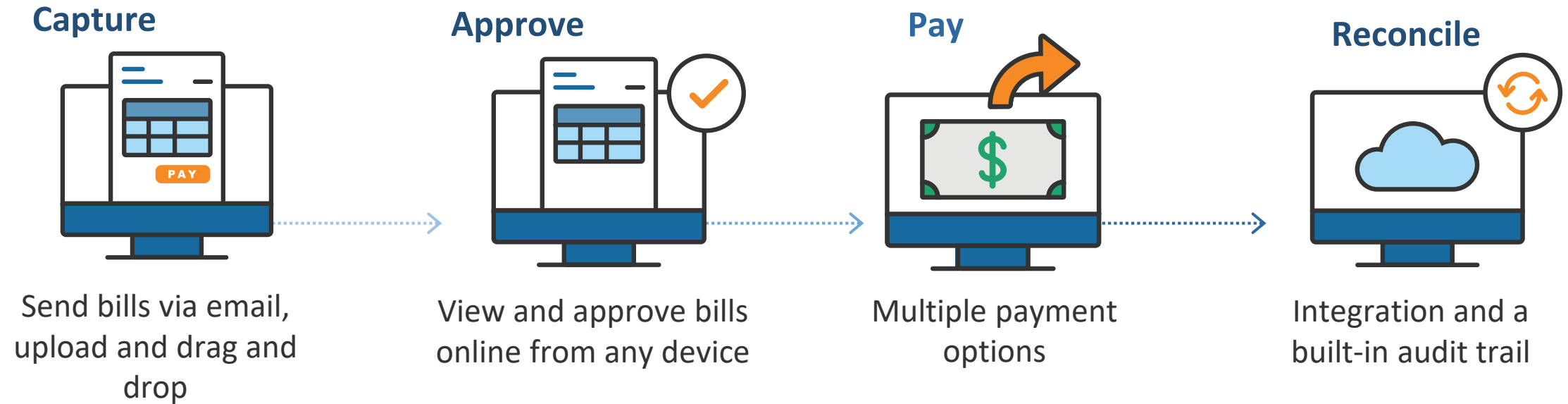
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Customer Validation  
Proven Scale  
Strong Network



**Bill.com continues to be the leading  
SaaS Platform for B2B Payments**

# 4 Steps Simple and Secure



**Paperless**

**Automated**

**Flexible**

**Efficient**

# Bill.com Demo

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# The Automation and AI Solution

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## Easy online bill pay

The simplest way to manage payments



## Transparent cash flow

See important payment details and documents, all in one place



## Mobile collaboration

Convenient access for anytime, anywhere bill management

# Security and Privacy

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Protections that reduce unauthorized account access and check fraud

Encryption of data in motion & at rest consistent with leading industry practices

Physical protections to manage data center risks

Payments made digitally through Bill.com keep bank account and routing information private

SOC 1 and SOC 2 attested

## Polling Question 2

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In your ideal bill payment solution, which of the following would automation and AI help to streamline your process?



# Benefits of Automation and AI



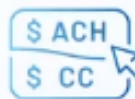
## Unlimited Document Storage & Management

Capture and store all contracts, supporting data, and transactional documents



## AI Invoice and PO Intake

Capture and entry of key invoice and PO data for bill processing



## Payment Flexibility

Multiple options: ACH e-payments, international wires, Vendor Direct virtual card, checks



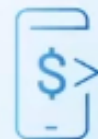
## Integration

On-demand sync with leading accounting software to reconcile payments with full remittance details and audit trail



## Collaboration

Integration and communication with vendors and customers



## Mobile App

Manage AP on the go – take pictures of invoices, approve, pay, and more

# Polling Question 3

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Could automation help streamline your process?

# 2022 Inero Webinar Series

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# Thank You

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