

# CIRCULUS

SMB Product Brochure

The screenshot displays the CIRCULUS SMB Product Brochure interface. The browser address bar shows the URL: `app.circulus.io/reports/vendor-balance-detail`. The navigation menu includes: Bills, Vendor Credits, Expenses, Payments, Payees, Reports, References, Admin, Wes Wilkins, and KHarmon. The dashboard features several key sections:

- Quick Links:** Add a Bill, Pay Bills, Manage Vendors, Manage Users, Search Bills.
- To-Do List:** Bills ready for payment (3), Open bills requiring approval (1), Bills ready for review (2), Bills ready for data entry (2).
- Unpaid Bills:** A bar chart showing unpaid bills over time. The Y-axis ranges from \$0 to \$2,000,000. The X-axis shows dates: 12-09-2016, 12-10-2016, 12-30-2016, 12-31-2016, 01-14-2017, 01-31-2017. A significant bar is visible for 12-10-2016, reaching approximately \$1,200,000.
- Account Settings:** Edit User Profile & Settings, Modify Bank Account Info.
- Notification Center:** No messages were found.

A vertical "Live Chat" button is located on the right side of the dashboard.

# PAYABLES. SIMPLIFIED.

## About Circulus SMB

Circulus SMB was created to provide small and medium-sized businesses with the tools to harness the power of an automated online AP workflow. It's our goal to offer a solution that is affordable to any business, while not compromising on technology or features.

We've developed a solution which allows users to streamline processes, enhance data quality, tighten AP controls, and consolidate bill management into a single interface. Above all, we've created a simple-to-use solution which allows customers to focus on doing what they do best - **grow their business.**

Whether you're a major corporation or a small business just getting up and running, the principles of a well-executed AP workflow remain the same. The need for controls, visibility and automation are the driving force behind Circulus SMB. Our platform provides companies of all types with the tools needed to transform legacy processes into a streamlined accounts payable function.

- **Auto-sync data with accounting software**
- **Expedite processing speed**
- **Monitor the entire AP process**
- **Enforce business rules and user roles**

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The system is very user friendly. The support team is great their response time is amazing. This is a very good program and our customers love it.



- Apps.com



# ENTERPRISE TOOLS. SHOESTRING BUDGET.

## Flexible Bill Pay Options

Schedule your process date and choose to pay via ACH or check. Once your payments are processed, the data will be automatically synced with your Quickbooks account. We also support partial payments, and the ability to flag payments made outside of the Circulus SMB platform.

## Quickbooks Integration

With daily automatic data synchronization as well as on-demand sync options, your data is kept up to date across both tools. With 14 unique datapoint integrations, Circulus supports integration with both Quickbooks Online and Quickbooks Desktop.

The screenshot displays the Circulus SMB platform dashboard. At the top, there is a navigation bar with tabs for Bills, Vendor Credits, Expenses, Payments, Payees, Reports, References, and Admin. The user's name, Wes Wilkins, and a dropdown arrow are visible on the right. Below the navigation bar, the dashboard is divided into several sections:

- Quick Links:** A list of actions including "Add a Bill", "Pay Bills", "Manage Vendors", "Manage Users", and "Search Bills".
- To-Do List:** A list of tasks with counts: "Bills ready for payment" (3), "Open bills requiring approval" (1), "Bills ready for review" (2), and "Bills ready for data entry" (2).
- Bill Status:** A donut chart showing the distribution of bill statuses. The legend indicates: "Ready For Review" (light blue), "Ready For Approval" (dark blue), and "Ready For Payment" (grey).
- Notification Center:** A section for messages, currently showing "No messages were found". A sync notification at the bottom indicates "Last Sync at: 01/29/2016 11:16:00 PM" with a "Sync Status: Success".
- Account Settings:** A list of settings including "Edit User Profile & Settings", "Modify Bank Account Info", "Change Subscription Plan", "Edit Quickbooks Sync Settings", and "Edit User Permissions".

## Powerful AP Workflow

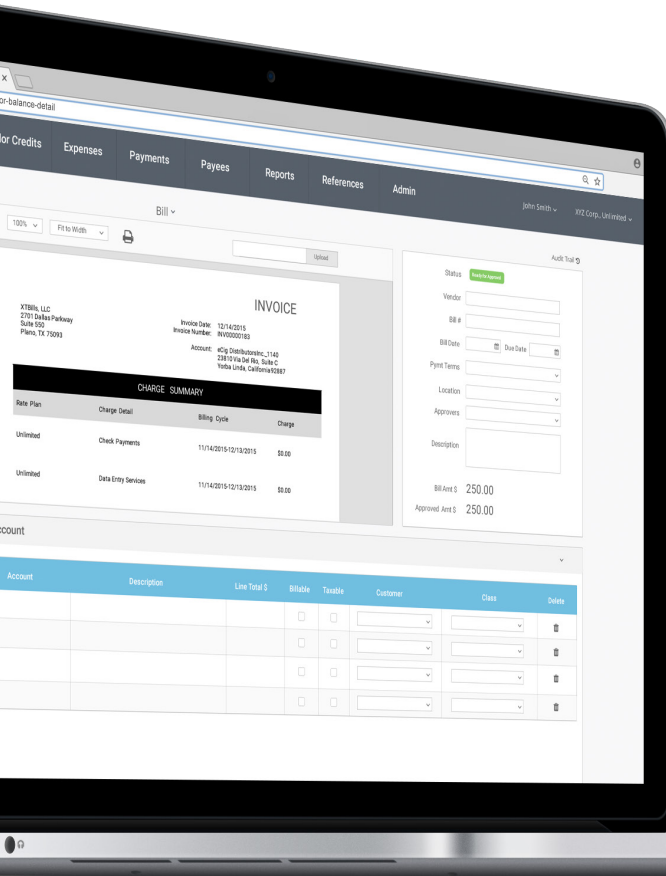
From a simple enter-and-pay process to complex review and approval flows, Circulus can scale to meet your needs. Our detailed role-based permissions allow for checks and balances across the entire AP process, with all activities being timestamped and presented within an intuitive audit trail format.

## AP Reporting Suite

Keeping tabs on your cashflow is critical, and our AP Reporting tools were designed to keep your finger on the pulse of your payables. View payment history, outstanding payments, vendor balances and more, all with a reporting suite that allows you to view, export and share your data.

# BILL PAY HAS NEVER BEEN SIMPLER

Below is an example workflow to show just how simple the process can be. If you need more or less control for your company, no problem. Circulus SMB is extremely flexible and can be configured to fit your needs.



1

## Add a Bill

Bills can be added by emailing attachments to your dedicated inbox, by creating directly within the platform, or by uploading a bill image from your mobile device.

2

## Enter Bill Data

Enter detailed bill data by account or by item, including coding for customers, classes and taxable items. You can even add nets and attachments to each bill for reference. You can even send your bills to us for data entry.

3

## Send for Approval

If you require an approval workflow, simply select as many approvers as you need for a given bill. From there, the bill will appear in each approver's to-do list, and once all approvals are given, the bill will be ready for payment.

4

## Schedule Payment

Choose a specific processing date for each of your bills, your payment method and a bank account from which to draw the funds. **That's it - simple, right?**

## 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

# PRICING

Most Popular

Startup	Business	Corporate	Unlimited
\$17.99/mo.	\$27.99/mo.	\$37.99/mo.	\$57.99/mo.
<b>1 User</b>	<b>3 Users</b>	<b>5 Users</b>	<b>Unlimited</b>
<p>Great For:</p> <ul style="list-style-type: none"> <li>• Solo business owners</li> <li>• Simple enter &amp; pay process</li> </ul>	<p>Great For:</p> <ul style="list-style-type: none"> <li>• Small accounting teams</li> <li>• Companies requiring an approval process</li> </ul>	<p>Great For:</p> <ul style="list-style-type: none"> <li>• Mid-sized accounting teams</li> <li>• Companies requiring an approval process</li> <li>• Companies requiring multiple user types</li> </ul>	<p>Great For:</p> <ul style="list-style-type: none"> <li>• Large accounting teams</li> <li>• Companies requiring an approval process</li> <li>• Companies requiring multiple user types</li> <li>• Companies processing employee expenses</li> </ul>

ACH Payments	Check Payments	Full-Service Data Entry
\$0.45/ea.	\$1.39/ea.	\$0.99/ea. <small>*per bill, maximum of 5 items when itemization is required.</small>

Not just document management. Not just workflow. Not just accounting software sync and not just bill payment. At Circulus SMB, we provide all of these features within a single, secure platform.

	Circulus	Data/OCR Solutions	Accounting Software	Business Banking	Document Hosting
Customizable workflow and bill approval processes	✓				
Execute check & ACH payments from a single portal	✓			✓	
Dedicated bill inbox	✓	✓			✓
Unlimited bill image & support file hosting	✓	✓			✓
Document data entry services	✓	✓			
Quickbooks integration & data sync	✓	✓	✓		
Detailed bill, vendor and user audit trails	✓		✓		
Customizable user permission levels	✓	✓	✓		✓
Detailed AP reporting capabilities	✓		✓	✓	

# FAQ

## **What Do I Get With My 30-Day Free Trial?**

Your Free Trial allows for up to 3 users, in addition to providing 15 complimentary ACH payments, 15 complimentary check payments and 15 complimentary bill data entry services.

## **Can My Account Have Multiple Companies?**

Certainly. It's as simple as adding a new company from within your account and completing the company profile. Each company will have its own subscription and billing period, as well as being linked to its own Quickbooks Online or Quickbooks Desktop account.

## **How Does Circulus Charge My Account?**

Upon completion of your trial period and entry of credit card information, you will be immediately charged for your first month of service. Each month after that, you will be billed for the upcoming month's platform access in addition to the previous month's balance of ACH payment, check payment, and data entry transaction fees.

## **Do I Need Quickbooks to Use Circulus?**

At this time, an active Quickbooks Desktop or Online account is required to utilize the full bill payment capabilities of Circulus. We are hard at work crafting additional accounting software integrations and standalone options, so stay tuned.

## **How Are My Bill Payments Processed?**

We are partnered with one of the largest and most established banks in the United States in order to process check and ACH payments made via Circulus. All payments are FDIC insured, and we have implemented industry leading services to monitor web security, privacy, and PCI compliance.

## **When Will My Payments Arrive?**

Our daily cutoff time to process bills is 5pm Central Time, Monday-Friday. Once processed, payments will typically be received into vendor bank accounts within 3 business days for ACH payments, and in-hand within 3-5 business days for check payments.

## **Can I Make International Payments?**

Unfortunately, we do not support international payments at this time. All payments must be made to and from US bank accounts.

## **Do You Have an Accountant Program?**

Of course! We have a great relationship with accountants and bookkeepers. Our accountant program is a great way to get your clients to make the leap to cloud-based AP automation.

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The customer service team goes above and beyond with any issues you have and are extremely responsive to any/all questions. I highly recommend this app!



- Apps.com

# ALL THE BELLS

(with whistles thrown in for free)

## WORKFLOW

- Intuitive dashboard
- Account setup wizard
- Editable review, approval and payment workflow
- Editable account notification settings
- Document change audit logs
- 5 editable user profile settings
- Payment lead time settings
- Add and edit vendors and vendor settings

## INTEGRATION

- Complimentary Quickbooks integration
- Supports Quickbooks Online and Desktop
- Daily and on-demand data synchronization
- Detailed account sync logs
- Flexible conflict handling options
- 14 integrated data points
- Sync data lookup tables from Quickbooks account

## AP MOBILE APPLICATIONS

- Review, approve and pay bills
- Take bill photos directly from your device
- Send bill images to Circulus for data entry
- Upload bill images from device image library
- Access your bill activity calendar
- Add bill comments and notes

## REPORTING

- Export, email & print reports
- Bill, payment, and uncashed check reports
- Vendor balance reports
- Aging reports

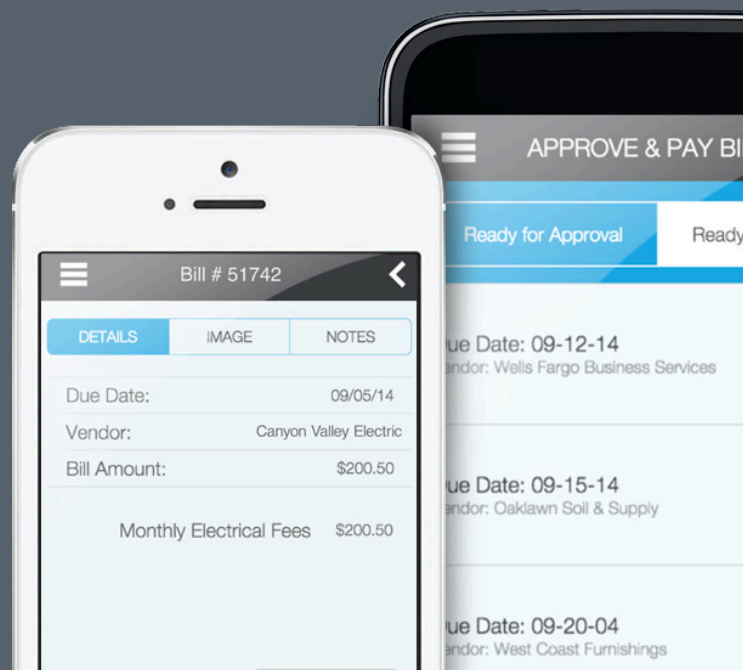
## SUPPORT

- Complimentary toll-free support
- Live chat support
- Email support
- Robust Knowledge Center
- Video Tutorial Center

## PRIVACY & SECURITY

- TrustE Certified
- Norton Secured SSL
- FDIC insured bill payments
- SOC I Type II Attestation
- 256 bit SSL encryption

Mobile applications available at:



WE **ARE** AUTOMATION

C I R C U L U S

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