

# Plooto

# Agenda

- What is Plooto?
- Onboarding – Three Simple Steps!
- Integration and How it Works
- Contact Us

# What is Plotoo?

Plotoo is an all-in-one accounts payable and receivable software that gives your business total control over cash management. We simplify manual payment and accounting processes, so you can focus on what's important. Unlock your growth potential today.

# Raised over \$26 Million USD (Series A&B)

**Luge** Capital

 **CENTANA**  
GROWTH PARTNERS

**FINTOP**  
C A P I T A L

**inovia**

# Security is our top priority



ISO 27001  
certified



Microsoft Azure  
for all data hosting



TDS and SSL  
data encryption



2FA: Two-Factor  
Authentication

# What we hear from Accountants & Bookkeepers



# Organizations Already Benefiting Thanks To Their AP/AR Services



20% of Revenue Comes from AP/AR Services



"Offering AP/AR allows us to be a full-service firm for our clients" - **Emma Fougere, CPA**



"Offering AP allows us to be a one-stop shop for our clients, helping with attraction and retention"  
- **Julian Hawkins, FCPA, FCA**



"Good AP/AR Management is the #1 reason for [positive] continuous cash flow for our clients" - **Michelle Felip**



"Automating AP/AR allows us to evolve with the times, instilling confidence and attracting high-quality clients" - **Heather Young**

# Why Plooto ?





### **Cost Savings**

Increase revenue and save your clients money by reducing human error



### **Secure Storage of Payment Information**

No more storing bank information in spreadsheets and physical void cheques. Encrypt and store it in the cloud!



### **Professionalize Your Services**

Be more tech-forward, organized, and differentiated from competitors



### **Time Savings for Your Team and Clients**

Offering automated AP/AR services gives time back to you and your clients



### **Reduce Manual Work**

No more writing cheques, retrieving physical approvals, e-transfers, or manual reconciliation



### **Audit Trails**

Detailed records that can be accessed by you and your clients anytime

# What does that mean for businesses each month?



## Cost Savings

Minimum: \$1,000

Average: ~\$2,500



## Time Savings

Minimum: 8+ Hours

Average: ~14 Hours

# The Reviews are in

**Software Advice** 

**4.5 / 5 Stars**



**4.5 / 5 Stars**



 **Capterra**

**4.5 / 5 Stars**



# What People Are Saying About Plotoo



Alissa Bryden, Founder  
Virtual Heights Accounting

***"I've found Plotoo to be a great partner and instrumental in helping me grow my firm."***



Andrew Abony, Co-Founder  
& CEO Adbloom

***"Plotoo saves us hundreds of hours and thousands of dollars, efficiently handling thousands of payments each month."***



Varun Sehgal, Partner  
Think Accounting

***"For me, Plotoo is the easiest, best integrated, most seamless way to pay customers direct through your accounting software."***



James Allen Partner,  
Chartered Professional  
Accountants

***"[Plotoo] has allowed us to better serve our external clients as we help them implement and grow their own payment solutions."***

# Onboarding in 3 simple steps

1

## **Company Verification**

Tell us a little about the business and submit one Business Registration document.

2

## **ID & Bank Verification**

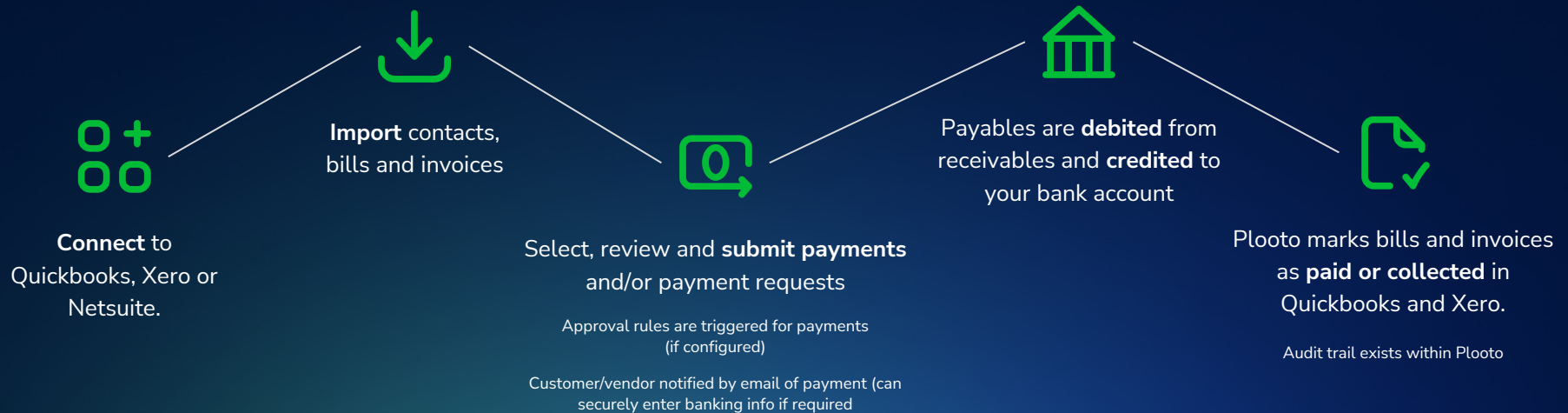
We connect with all major financial institutions and credit unions.

3

## **Connect your Accounting Software**

Seamless integrations with QuickBooks, Xero or Oracle NetSuite!

# The Cloud-Based Solution for AP/AR Services











# Pricing plans that scale with your business

Go

\$9

CAD/month

Everything you need to start automating payments  
Automatic two-way sync with









-  Automatic two-way sync with QuickBooks
-  Automatic two-way sync with Xero
-  Streamline invoice processing with Plotoo Capture (OCR)
-  Set basic approval workflows with 1 approver
-  Work with 1 accountant user
-  Conduct 5 domestic transactions per month (\$1 each)
-  Send international payments with competitive exchange rates
-  Accept payments with Pre-Authorized Debits (PAD) and credit card

Grow

\$32

CAD/month

Scale up your finance operations with custom  
payment workflows




-  Automatic two-way sync with QuickBooks
-  Automatic two-way sync with Xero
-  Streamline invoice processing with Plotoo Capture (OCR)
-  Set custom approval workflows with unlimited approvers
-  Work with unlimited accountant users
-  Conduct unlimited domestic transactions per month (\$0.5 each)
-  Send international payments with competitive exchange rates
-  Accept payments with Pre-Authorized Debits (PAD) and credit card

Pro




Contact us

CAD/month

Gain complete control over your complex  
payment operations

-  Automatic two-way sync with QuickBooks
-  Automatic two-way sync with Xero
-  Automatic two-way sync with Oracle NetSuite

Full platform access, plus

-  Implement dual controls on user actions
-  Manage user access with single sign-on (SSO)
-  Access priority customer support

Coming soon

-  Invoice approvals
-  Multi-level approvals
-  Multi-step approvals
-  Departmental approvals

# Why adopt Plotoo now?



Mitigate human errors with integrations and automatic reconciliation



Plotoo grows with your business. Set up an account in less than an hour!



Start protecting your payments before something goes wrong with 2FA and Payment Approvals



Your clients, vendors and suppliers will love you!



Plotoo ensures you have a tight handle on your cash flow management



No risk to try it out! Get started with Plotoo while we're top-of-mind!



# There's more:

## Partner discounts and benefits



### Client Subscription Discounts!

10% - 20% on the base subscription. We'll give your firm a free subscription after your 3<sup>rd</sup> client!



### Dedicated Support from Ploto

One-on-one dedicated support, training sessions, custom resources and group webinars.



### Partnership & Marketing

Be featured on our website, social content, participate in webinars and more!

# Contact us

Partners@plooto.com

1-844-475-6686 (Option #1)

## Start transacting with Plooto!

- Add your client's account
- Verify their company and any users
- Connect their bank account
- Send a test payment as part of your client's 10 free domestic transactions
- Start saving dozens of hours and hundreds of dollars each week!

The screenshot displays the Plooto dashboard interface. On the left, a sidebar menu includes 'Set Up Payments', 'Payment Approvals' (with a red badge showing 3), 'Pending Payments' (with a red badge showing 7), 'Completed Payments', and 'Foreign Exchange Calculator'. Below this is the 'Plooto Instant' section, which shows 'BALANCES' for CAD at \$25,000.00 and USD at \$8,500.00, with a 'Transfer Funds' button and a 'Manage Accounts' link.

The main content area is titled 'Payment approvals' and includes the text: 'These payments need you or your team members authorization before they can be debited.' Below this, there are two tabs: 'Payments Awaiting My Approval (3)' (active) and 'All Payments Awaiting Approval (7)'. The active tab contains a table with the following data:

Contact	Requested Debit Date	Amount	
Plooto Instant (CAD)	May 12	7,500 CAD	<input type="checkbox"/>
Intrepid Travel	May 14	500 EUR	<input type="checkbox"/>
Saga Innovations	June 1	2,400 USD	<input type="checkbox"/>

Thank you.

