

Routable

Scalable Accounts Payable Automation

SAGE INTACCT OVERVIEW

The easiest way to scale accounts payable

Routable is the easiest way for your team to scale accounts payable through automation and easy controls that let finance teams collaborate with any department.

We're excited to introduce our platform and how we work tirelessly to build the best solution for your Sage Intacct needs.

The screenshot displays the Routable software interface for Evergrow, Inc. The top navigation bar includes the company name 'Foxglove Cafe' and a 'New' button. The main dashboard is titled 'CFO' and features several key metrics:

- Cash & Cash Equivalents:** \$4,027K this month, an increase of +\$92,633 vs. prior month.
- Revenue:** \$177,645 this month, an increase of +\$36,116 vs. prior month.
- CMRR:** \$161,654 this month, an increase of +\$26,112 vs. prior month.

Below the metrics is a 'Deferred Revenue Forecast' chart showing a bar chart of revenue from 'Open' to 'Sep-20'. The y-axis ranges from \$0 to \$40,000. The chart shows a steady increase in revenue over the period.

At the bottom, there is a 'Balance Sheet Summary' table for the current month (04/30/2020) and current quarter (06/30/2020):

	Current Month 04/30/2020	Current Quarter 06/30/2020
Assets		
Current Assets	88,073,876.69	88,041,876.69
Fixed Assets, Net	12,894,740.89	12,894,740.89
Intangible Assets, Net	13,173,414.01	13,173,414.01
Other Assets	84,619.40	84,619.40

Import, email, upload and be API-ready

We want AP to work your way, from 100 → 100,000 monthly payables. Routable gives you the option to email, scan, or upload any bill or batch file.

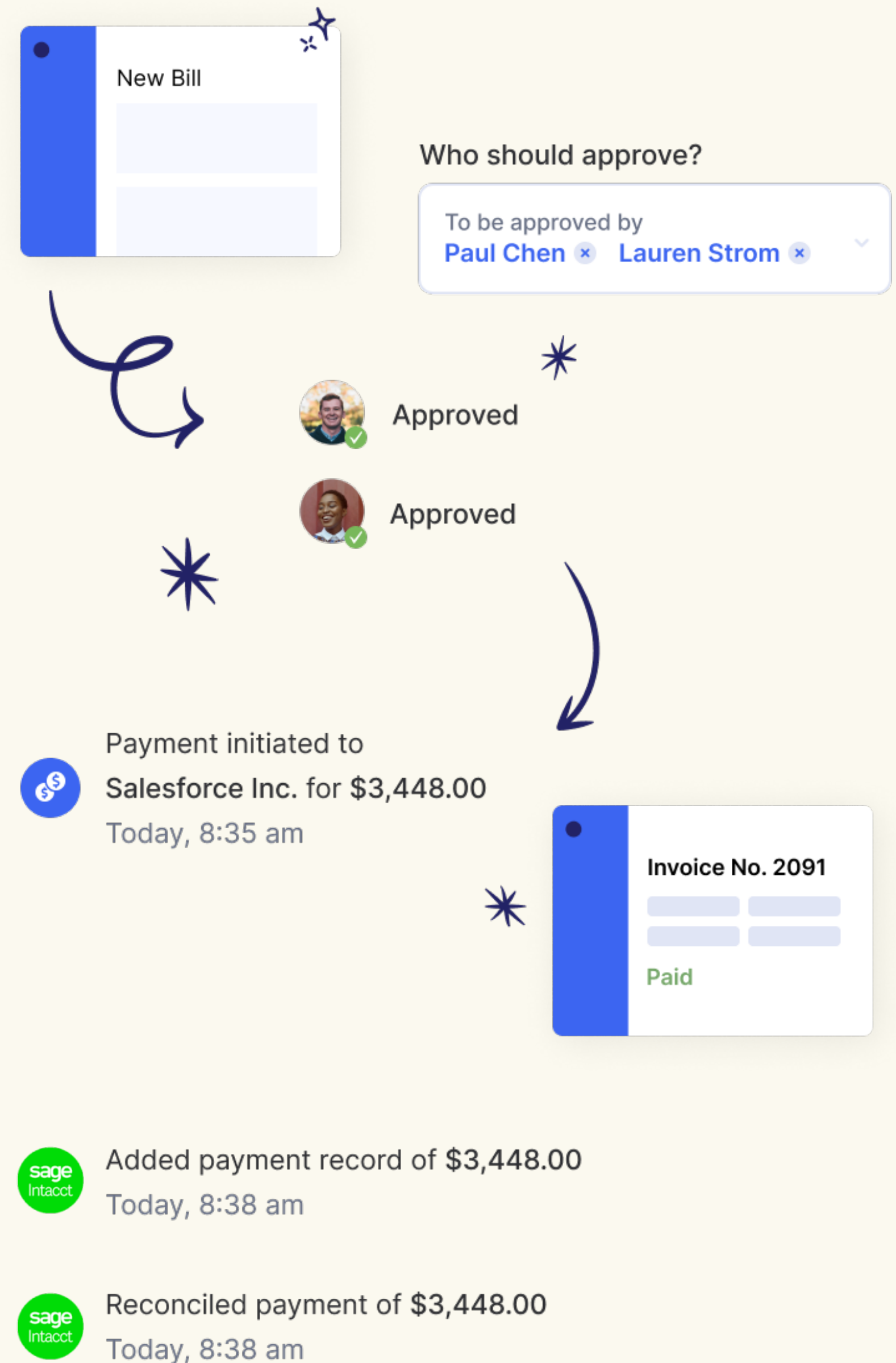
- Automatically forward bills from your email
- Upload CSV files
- Implement our sophisticated API for automated processing

<input checked="" type="checkbox"/>	Vendor
<input type="checkbox"/>	Fedex Inc. Lauren Michaels
<input type="checkbox"/>	Uber Freight Lee Winston
<input type="checkbox"/>	DHL Corp. Darren Uchiha
<input type="checkbox"/>	Convoy Inc. Riley Brown
Routable	

Be confident in your approval process

Ensure the right stakeholders can easily review and approve bills without slowing down your process.

- Easily select your approvers
- Customize your approver rules
- Communicate and document approvals
- Invite team members to discuss payments with flexible user permissions



We'll automatically update Sage Intacct

Our two-way sync keeps Sage Intacct up-to-date and makes reconciliation significantly less manual.

- Import settings from Sage Intacct
- Keep track of your bills, and transactions
- Reconcile faster our with real-time data sync with Sage Intacct



Payment initiated to Boyer
Construction for \$3,448.00
Today, 8:35 am



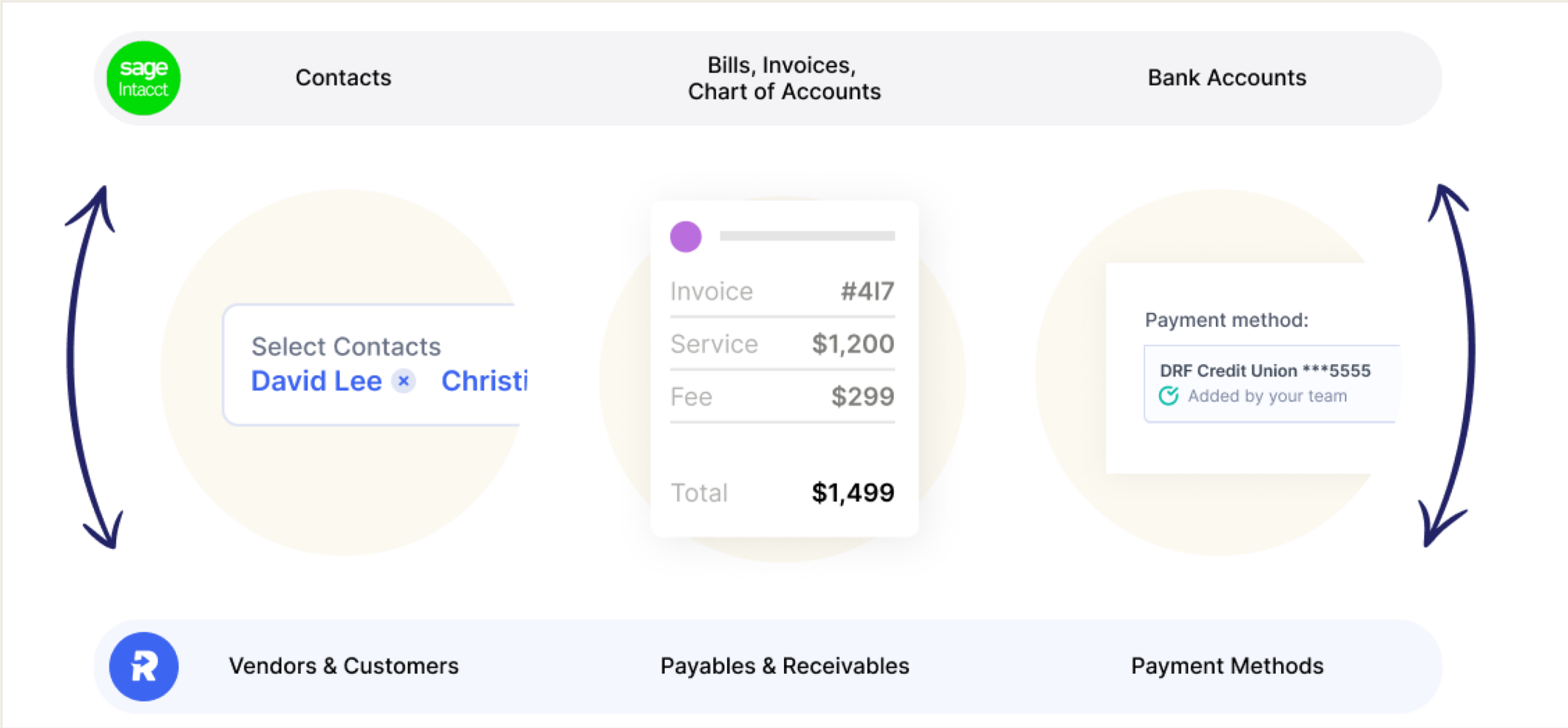
Added payment record of \$3,448.00
Today, 8:38 am



Reconciled payment of \$3,448.00
Today, 8:38 am



No need to press “sync”, it’s automatic



Easily manage hundreds of payments

In your payables dashboard, you can filter your payments to see the items that need your attention and select multiple bills at once to:

- Send, approve, or cancel hundreds of bills
- Manage payment release dates in bulk

The screenshot displays the 'All Payables' dashboard with 325 items. A table lists payables with columns for checkboxes, payee names (e.g., 'Johan's Jerky'), payable details (e.g., 'Bill #1234'), status (e.g., 'Needs approval'), and amounts. An 'Actions' dropdown menu is open, showing options like 'Approve' (26), 'Send' (1), 'Approve and send' (14), and 'Edit send date'. A 'Select filters' overlay is also visible, allowing users to filter by 'Status', 'Amount due', and 'Total received' with various operators like 'Is any', 'Is between', and 'Is over'. The overlay includes a blue '+' button and 'Cancel' and 'Clear filters' buttons.

Deliver the best vendor onboarding

We worked closely with our customers to create the best onboarding and payment experience for your vendors.

- Custom branded vendor management
- Automated collection of vendor contact information, tax and business info, and payment method
- User-friendly vendor experience

The screenshot shows the 'COMPASS' vendor onboarding interface, specifically the 'Tax Information' step. The breadcrumb trail at the top indicates the progress: 'Get Started' (checked), 'Contact Information' (checked), 'Tax Information' (active), and 'Payment Information' (disabled). The main heading is 'Add your tax information'. There are two radio button options: 'I represent a business' (selected, with subtext 'e.g. Sole prop, LLC, Corporation') and 'I am an individual' (unselected, with subtext 'e.g. Contractor or freelancer'). Below this is the 'Mailing Address' section, which includes input fields for 'Street Address, P.O. Box, C/O*', 'Apt, Building, Floor, etc.', 'Country' (a dropdown menu currently showing 'United States*'), 'City*', 'Select State' (a dropdown menu currently showing 'State*'), and 'Postal code*'. The 'Entity Information' section follows, with a 'Business Type' dropdown menu (showing 'Select business type*'), a 'Legal company name' input field (containing 'It's All Gouda Dairy Farms*'), and a 'Business EIN*' input field. At the bottom, there is a dark 'Continue' button with a right-pointing arrow.

Pay domestic or international vendors

We're committed to building the best international business payments experience, for your company and vendors.

- Support for SWIFT and Local Transfers
- Clear guidelines to sync payments, bank transfers, and FX rates right to Sage Intacct

• Pending

Approve Edit Cancel More

Payable Vendor My details

Balance

Amount due £3,293.00 EGP

Amount paid (by me) £0.00 EGP

Conversion rate \$1.00 USD = £1.29 EGP

Fee \$4.30 USD

Estimated converted amount \$10,277.30 USD

This estimation is using current exchange rates. Rates and fees could be different at time of payment.

Bill status

Awaiting Payment

Approvers

1st approval (one required)

Select unique roles for tighter permissions

We support four user roles: **Administrator**, **Creator**, **Approver**, and **Collaborator**, giving you control over what your team members can and cannot do in Routable.

- Strengthen your internal controls
- Have greater flexibility over your team's permissions
- Clearly define your team's roles and responsibilities

Team member management

Manage your team and set custom permissions for each team member

Team members (4)

Invites (2)

Inactive (3)

Team members

Team member	Role
 Desiree Bates (me) desiree@geraniumfarms.com	 Administrator
 Anna Smith anna@geraniumfarms.com	 Creator
 Bea Thomas bea@geraniumfarms.com	 Approver
 Xiomara Harris xiomara@geraniumfarms.com	 Collaborator

Need to scale beyond 1,000 payments?

We have two great options for scaling mass payouts while maintaining your controls.

Upload and send payments from a file ⌵ \$25,768 Sage Intacct connected ⌲ ✕

- Upload file
- Review**
 - Optional fields
 - Matching
 - Delivery options
 - Summary**
- Confirmation

Summary

Total **\$11,932,875.46** ⬆️ 100,358 payments 📅 99,768 scheduled ★ 4,736 ready to send

All payments to be created

Showing 1-15 of 100,358

Vendor	Due date	Amount due	Send date	
Lilly's Water Company	02/05/2021	\$ 1,024,686.00	02/05/2021	👁
ACME Corporation	02/05/2021	\$ 7,678.50	02/07/2021	👁
The Supply Co	02/05/2021	\$ 7,678.50	02/07/2021	👁
ABC Company	02/05/2021	\$ 7,678.50	02/07/2021	👁

Leverage an API-first experience to scale fast

We've launched a new API experience that is compatible with any environment and helps you customize your Ratable experience faster and help you scale beyond 1,000 payments per month.

- New SDK support
- Guides for embedding Ratable into your own app or platform
- Easily integrate Ratable / Ratable's accounting software syncing capabilities into your app

The screenshot shows a documentation page for Ratable. At the top, there's a header with the Ratable logo and the title "Create your first Payable". Below the title is a subtitle: "Learn how to create your first vendor and payable in a few easy steps." The main content area is divided into two columns. The left column contains a list of steps: "1. Retrieving a Team Member", "2. Retrieving an Account", "3. Create a Company", and "4. Create a Payable". The "1. Retrieving a Team Member" step is currently selected and expanded. It contains text explaining that many requests require an `acting_team_member` parameter and provides the API endpoint `/v1/settings/team-members`. Below this text is a "Next" button with a right arrow. The right column is titled "Python" and contains a code block showing a Python script that uses the `requests` library to make a POST request to the Ratable API. The script defines headers, an `acting_team_member` ID, and a `withdraw_from_account` ID. The JSON body of the request includes fields for `acting_team_member`, `contacts` (with email, first_name, last_name, and phone_number), `is_customer`, `is_vendor`, `display_name`, and `type`. Below the Python code, there's a JSON response snippet showing the structure of a "Payable" object, including fields like `id`, `attachments`, `amount`, `amount_due`, `amount_paid`, `approved_at`, `bill_number`, and `due_date`.

Book a time to learn more

Our team is ready to chat! Whether you'd like a demo or a technical deep dive, a Routable team member will be ready to assist you.

