

The
'APPY HOUR
with Liz & Heather
www.theappyhonor.com

Firm Spotlight with Decimal

Decimal



Meet your Hosts



Heather Satterley

Director of Education and Media, Woodard®



Liz Scott

CEO, Liz Scott Training & Consulting



Decimal

Matt Tait

CEO

- Career as an entrepreneur, having previously launched two technology companies
- Focused on helping businesses, making it easier for them to operate while creating great customer experiences
- Launched Decimal with Co-Founder Jacob Cloran to solve financial operations, bookkeeping, and tax for small and medium-sized businesses

Proposals



Payment Processor



Banking



E Commerce



Accounts Payable



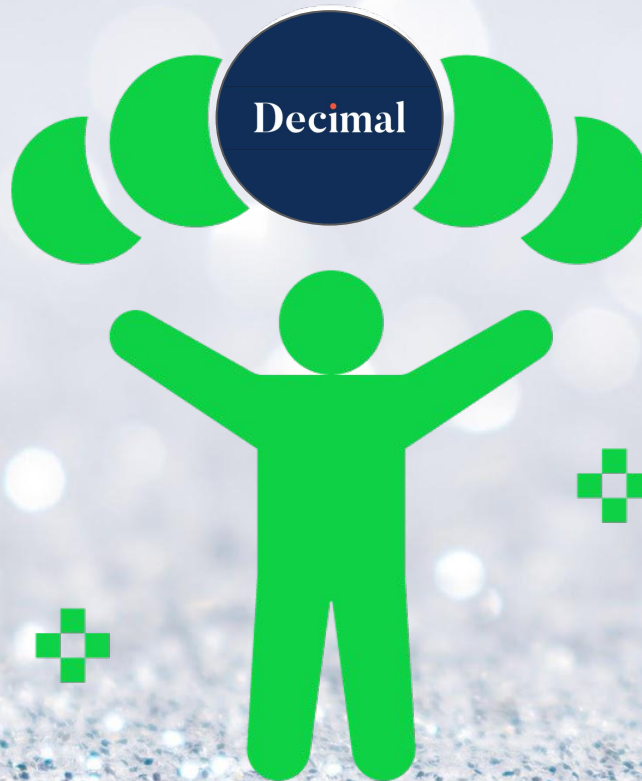
Training

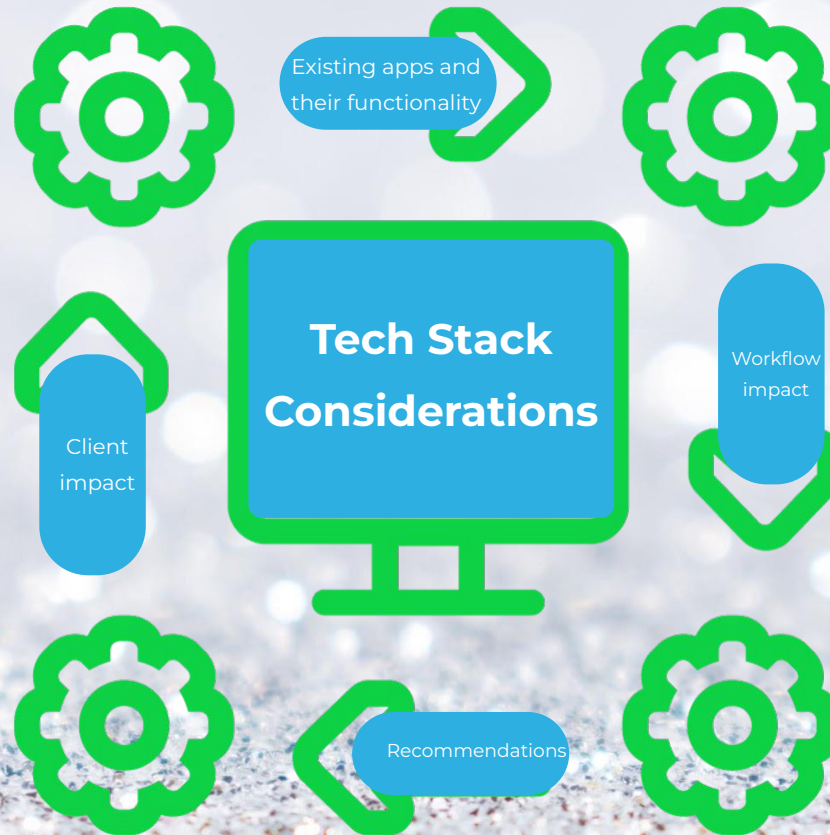


THANK YOU 2024 SPONSORS!

Firm Insights

- **Team Size: 90 Globally**
- **Client Size: 500+**
- **Niche: Home services, Professional services, SaaS**
- **Growth Goals: Triple in the next 3 years!**

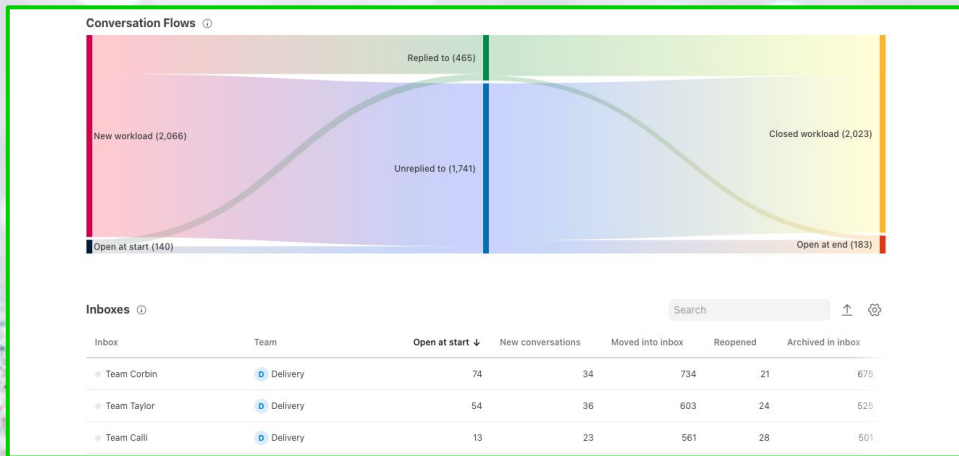
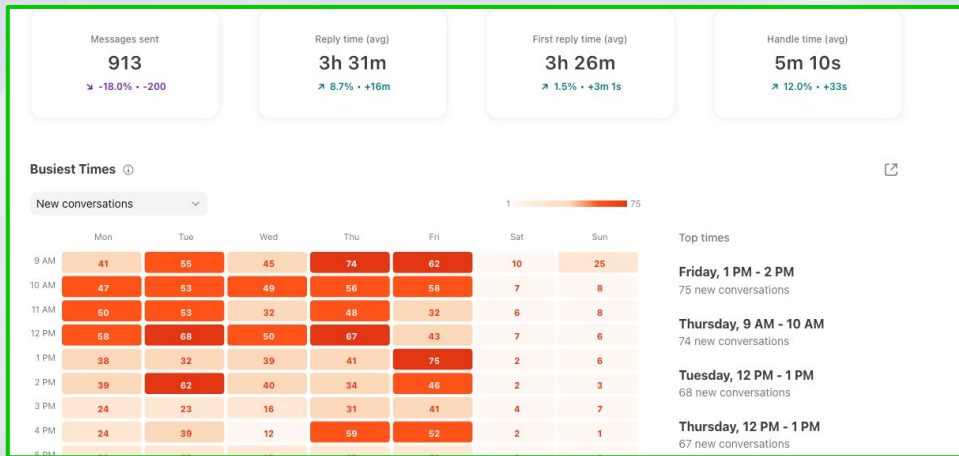






Internal Apps

- Front
- Google Suite
- Sales Force
- CacheFlow
- HubSpot
- Rewind
- 1Password
- ClickUp
- Notion
- Lattice
- Webflow
- Slack



Re: Your Decimal Renewal Is Ready For Signature INBOX

Thank you again, and feel free to reach out if there's anything else we can assist you with!

—

Amy Fink
Chief of Staff
[Decimal](#) | [www.Decimal.com](#) | [LinkedIn](#)

...

← Reply

Amy Fink

@taylor signed their agreement to add Synder for invoicing.
@katie will be submitted a ticket for the implementation.

👍 1 🗨️

📁 Archived

Katie Lamb

Ticket created for solutions triage (didn't route through Taylor on this one) ⭐ ↶

👍 1 🗨️

Add a comment or add others with @

External Apps

- Settle
- QuickBooks
- Gusto
- Synder
- Rippling
- Unleashed
- Amazon
- ADP
- Shopify
- Jobber
- CIN7
- Routable
- Taxdome



Purchase order DRAFT 1 of 520

01928389 Created in Settle - Today at 11:31 PM UTC

Details Linked docs

Purchase order created in Settle
Cashflow management for the modern business

Purchase Order

PO # 01928389
PI # 57
Issued on 02/06/2024

Show vendor payment terms

Memo

| # | Item name | SKU | Price | Qty | Total |
|------------|-----------|-----|-------|-----|--------|
| | Name | | 0.00 | 1 | \$0.00 |
| Subtotal | | | | | \$0.00 |
| Tax | | | | | \$0.00 |
| Line Items | | | | | \$0.00 |

Open PO

Create POs faster
No more copy and pasting
SKUs! Procurement with
auto-fill

Effortlessly itemize bills
Track spend without manual
data entry with auto-itemize



Find mismatches without matching
Settle will automatically flag discrepancies to
make sure you aren't getting overbilled

Compare documents 0

Bill Purchase order Goods received note

There are discrepancies between 3 documents. 2 items fully matched, 9 items partially matched or have discrepancies, 11 items are unmatched, meaning unique for certain docs

#0000-01 100% +

Acme Corp

Bill

| # | Item name | SKU | Price | Qty | Item total |
|---|-------------------------|--------|---------|-----|------------|
| 1 | Vans Old Skool White, S | 000 W5 | \$50.00 | 3 | \$150.00 |
| 2 | Vans Old Skool White, M | 000 W6 | \$50.00 | 3 | \$150.00 |

Item name Price Qty Total

| | | | |
|--------------------------|---------|---|----------|
| WG Case Sourdough Long | \$50.00 | 6 | \$300.00 |
| Vans x Disney Collection | \$50.00 | 6 | \$300.00 |
| Authentic Pro | \$50.00 | 6 | \$300.00 |

#0000-01 100% +

Anton's Business

Purchase order

| # | Item name | SKU | Price | Qty | Item total |
|---|-------------------------|----------|---------|-----|------------|
| 1 | Vans Old Skool White, S | 000 W5 | \$50.00 | 3 | \$150.00 |
| 2 | Vans Old Skool White, M | 000 W6 | \$50.00 | 3 | \$150.00 |
| 3 | Levi's Jeans 51 Blue, M | L501 B44 | \$50.00 | 2 | \$100.00 |

Item name Price Qty Total

| | | | |
|--------------------------|---------|---|----------|
| WG Case Sourdough Long | \$50.00 | 6 | \$300.00 |
| Vans x Disney Collection | \$50.00 | 6 | \$300.00 |
| Authentic Pro | \$50.00 | 1 | \$300.00 |

#0000-01 100% +

Goods received note

| Item name | Price | Qty | Total |
|--------------------------|---------|-----|----------|
| WG Case Sourdough Long | \$50.00 | 6 | \$300.00 |
| Vans x Disney Collection | \$50.00 | 6 | \$300.00 |
| Authentic Pro | \$50.00 | 6 | \$300.00 |

Pay how you want
It's your purchasing
power! Easily tap your
financing or bank
when paying a bill

Purchase order OPEN 1 of 520

Foshan Sitzone Furniture Co., LTD.
Uploaded manually - Today at 3:33 PM UTC

Sync Disabled by Book Close Date

Details Linked docs

Purchase order added by Cathryn Stenning
02/06/24, 3:33 PM

Status Open

PO details

PO # ***
PI # ***
Issued on ***

Memo

| # | Item name | SKU | Price | Qty | Unit/UM | Total |
|------------|-----------|-----|-------|-----|---------|--------|
| | Name | | 0.00 | *** | Unit | \$0.00 |
| Subtotal | | | | | | \$0.00 |
| Tax | | | | | | \$0.00 |
| Line Items | | | | | | \$0.00 |

Delivery

Ship to

Shipping method

Receive by

Shipping terms

Contact details

Payment details

Payment amount *
135,897.80

% of inv.
100%

Currency *
USD

\$135,897.80 to cover bill liability

Pay from my bank account Finance payment

Payment method *
ACH (US only) \$0.40

Repay Settle from *
Citi - Account for Return *9898

Settle will pay vendor ... 02/07/2024

Extend for *
30 days

You don't have payment terms saved for this vendor.
Add terms

Payment timeline

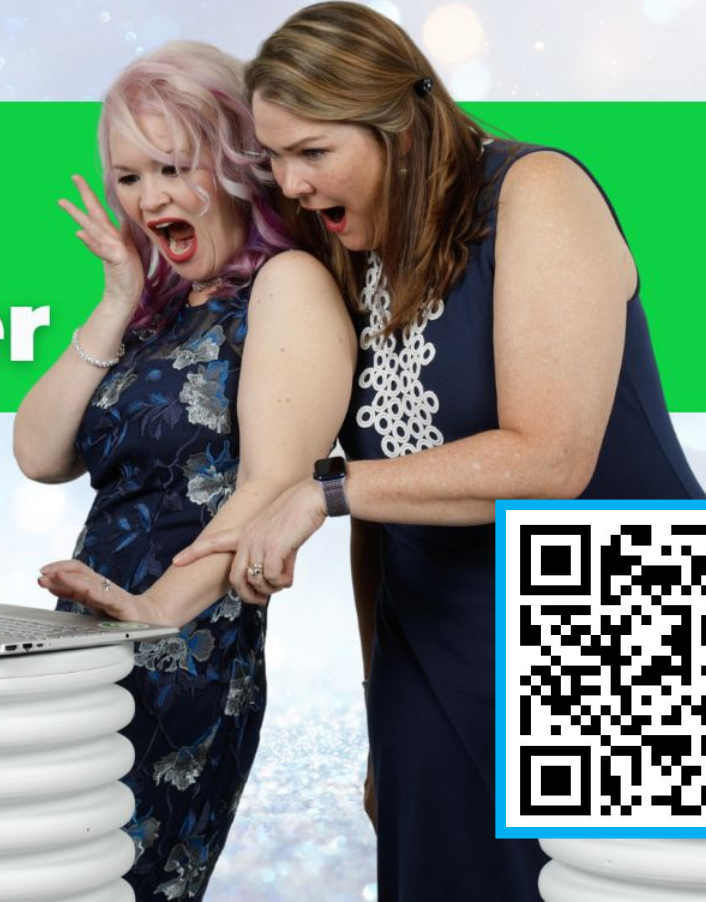
Settle will pay vendor \$135,897.80 USD 02/07/24

ETA to vendor 02/07/24 - 02/12/24

Cancel Proceed

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YOUTUBE CHANNEL**

The 'Appy Hour with Liz & Heather





The 'Appy Hour Lounge Facebook Group

Upcoming Episodes

03/12/24 Deep Dive into Settle: Bill Pay, Purchasing, & Financing

03/26/24 Exploring the capabilities of AI Bots with Liz & Heather

04/09/24 TBD

Deep Dive into



March 12th, 2024 4:00 PM EST