



Harnessing the Butterfly Effect

Small Shifts Create Monumental Outcomes
for Accounts Payable

MEKORMA



Ora Goldman

Founder / CEO

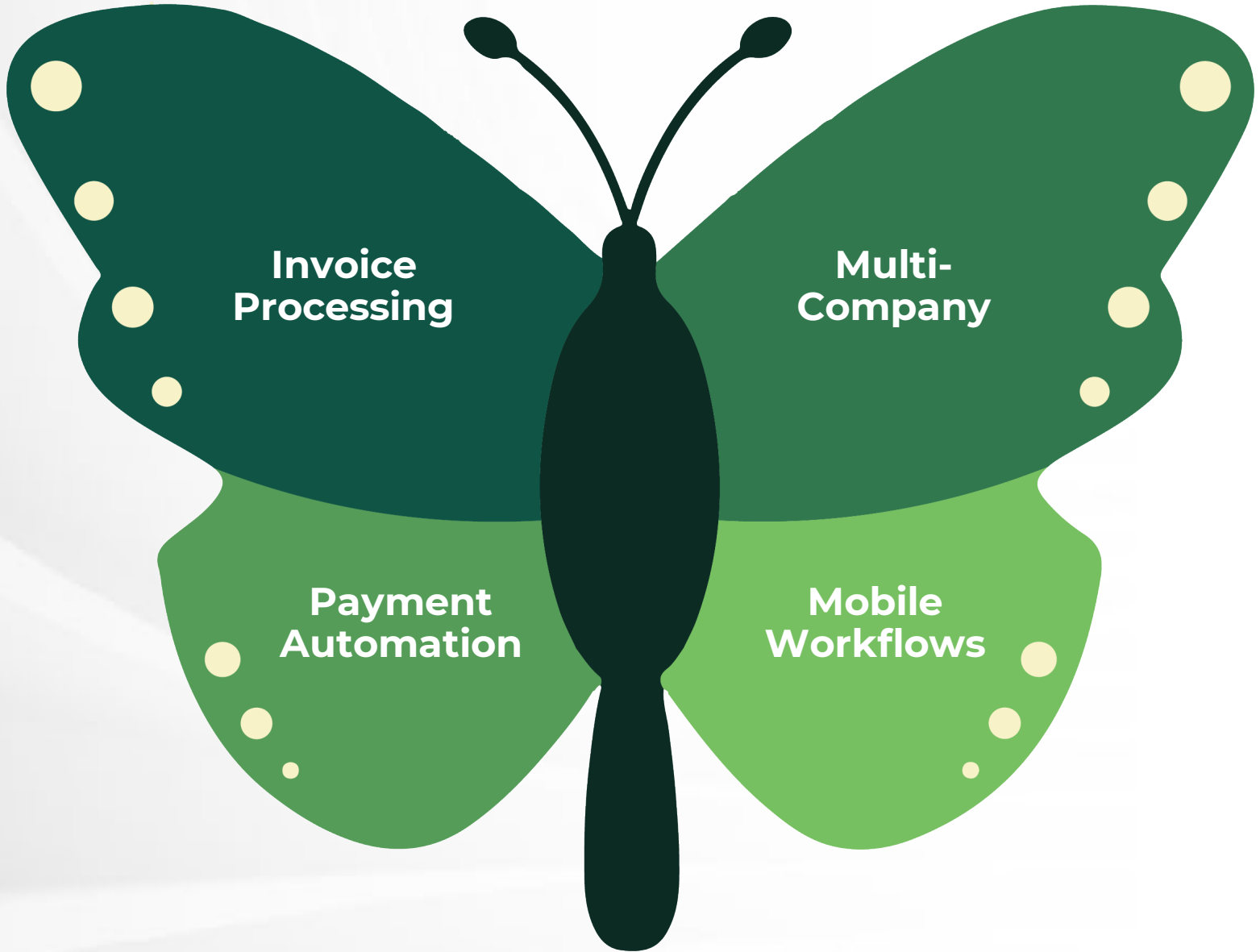


Brendan Coffey

Partner Engagement Manager

AGENDA

- ▶ The Butterfly Effect in AP
- ▶ An HVAC Company's Big Impacts
 - ▶ Invoice Processing
 - ▶ Multi-company
 - ▶ Mobile Workflows
 - ▶ Payment Automation



Case Study: *HVAC Company*

Challenges

- Shared service AP department runs 8 vertically-integrated HVAC companies.
- Their finance department relied on check-based payments, but they faced challenges in scaling their back-office processes to support growth in new markets.
- The Accounts Payable (AP) team was bogged down in manual and redundant processes, including logging into each company's system separately and chasing signatures for check payments. The team processed up to 30 batches and 250 checks weekly. Vendor requests for electronic payments added to their burden, and maintaining vendor banking data was a concern.



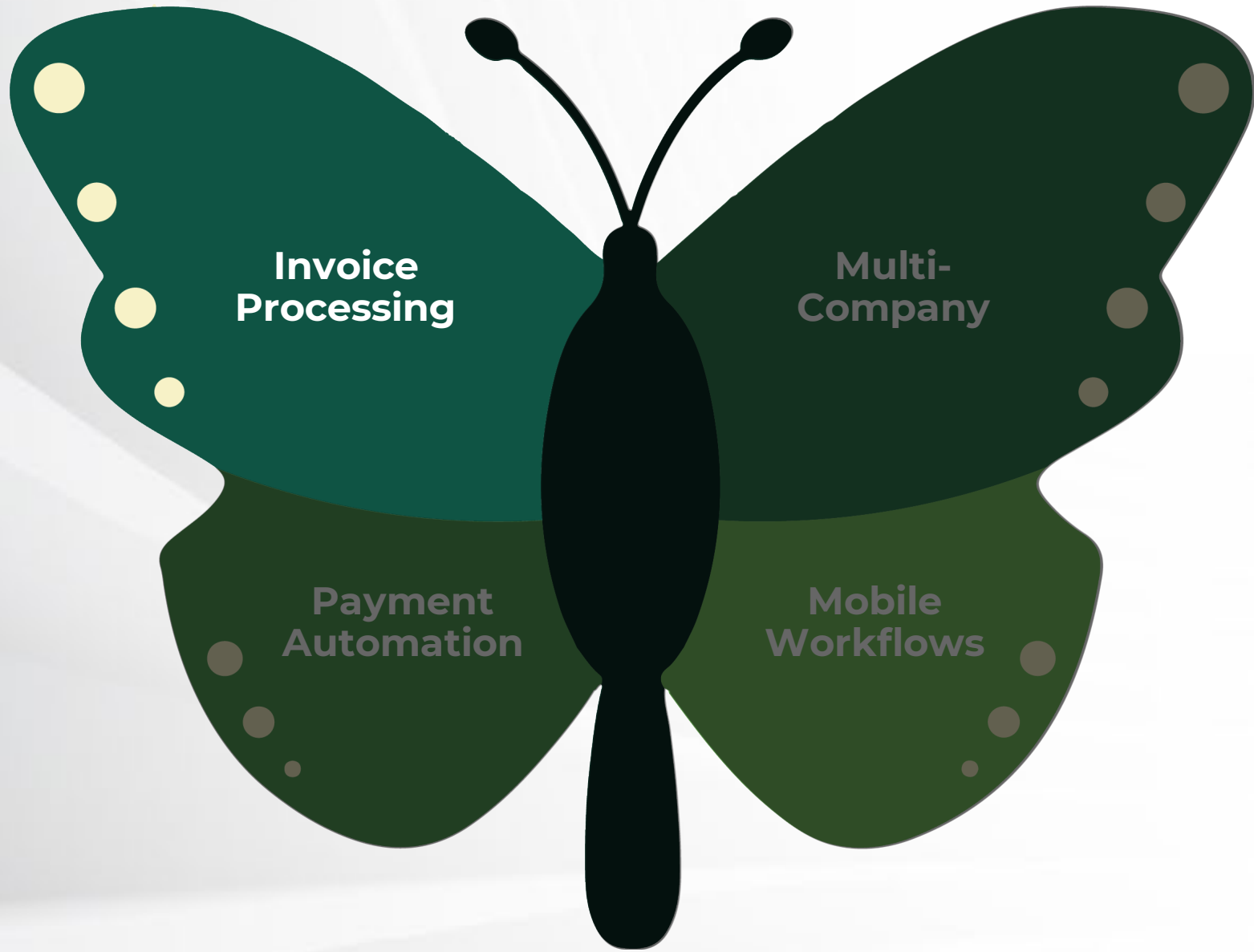
Industry: Industrial Machinery Manufacturing

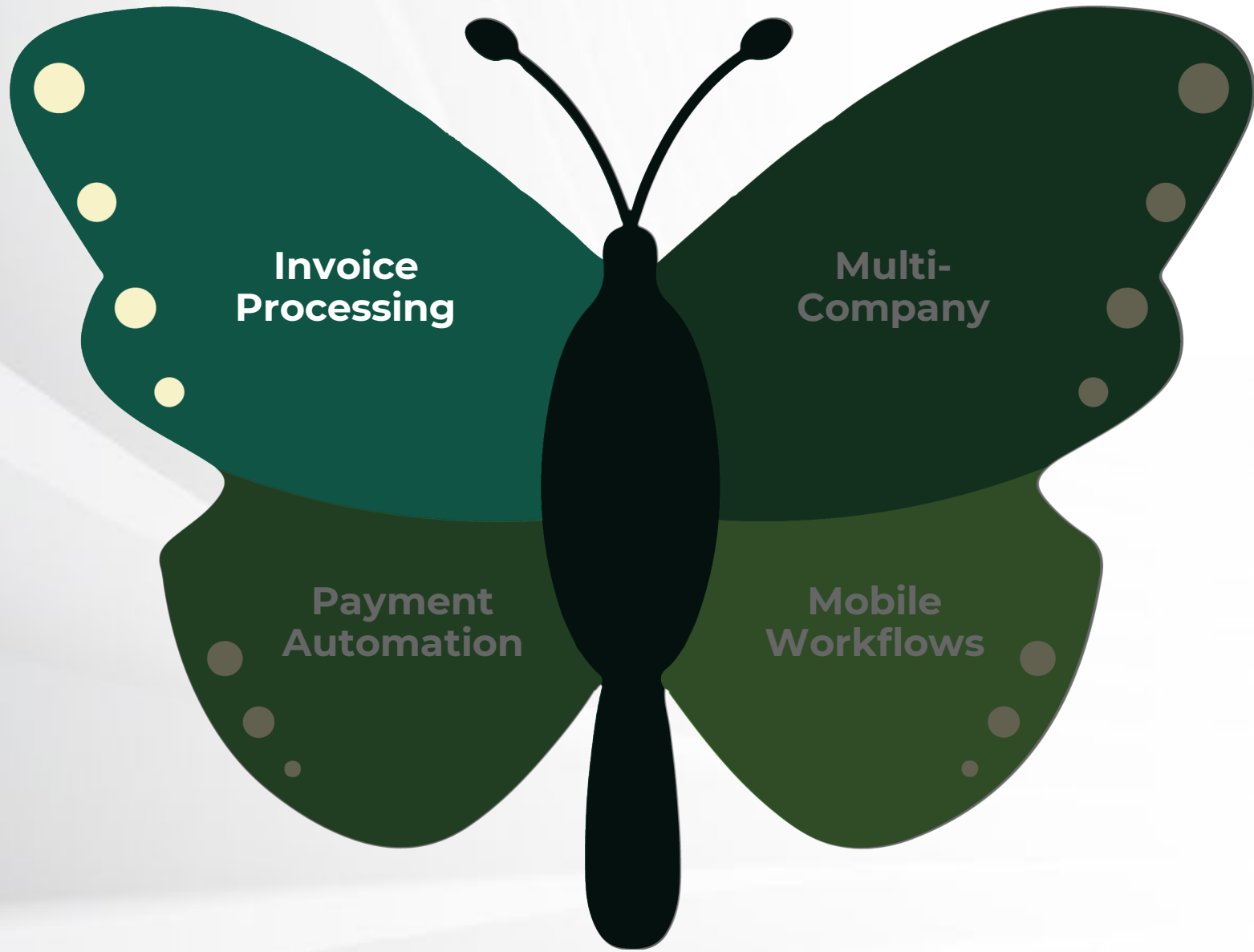
ERP: Great Plains

Vertical: HVAC Distribution Service

Annual Revenue: \$300 Million

Live Date: January 2021





**Invoice
Processing**

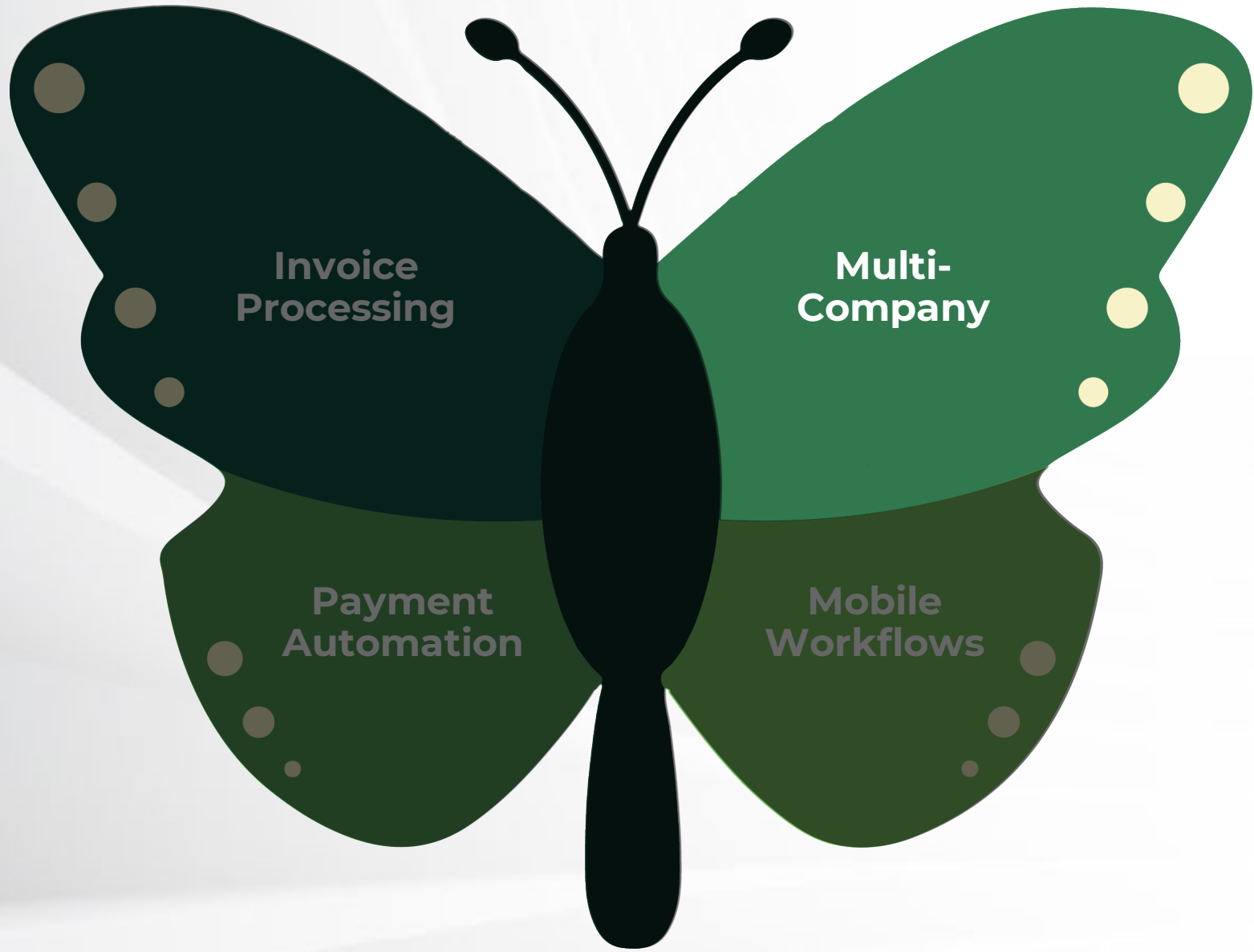
**Multi-
Company**

**Payment
Automation**

**Mobile
Workflows**



**Reduced days to pay
from 10 to 3, capturing
discounts**

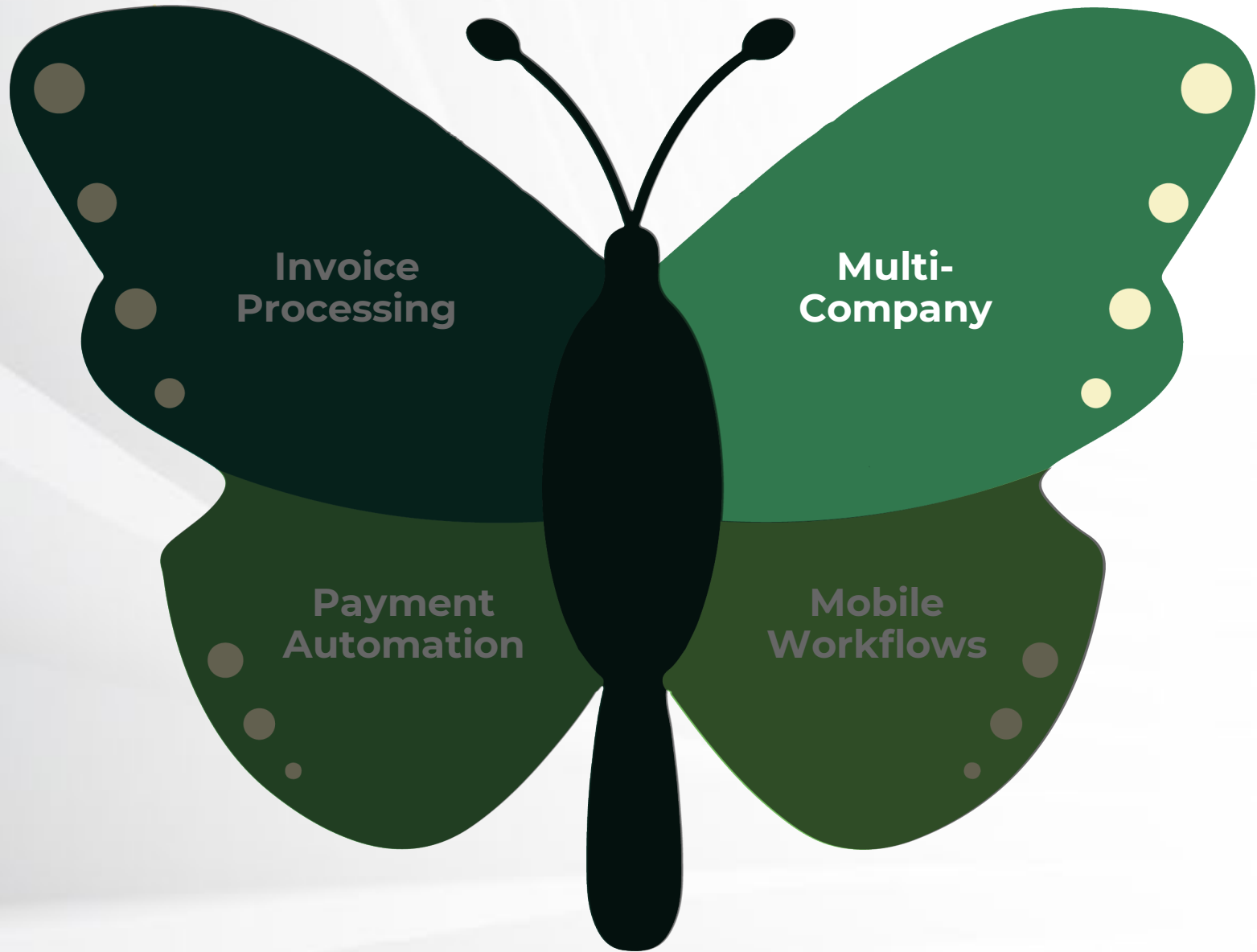


Invoice
Processing

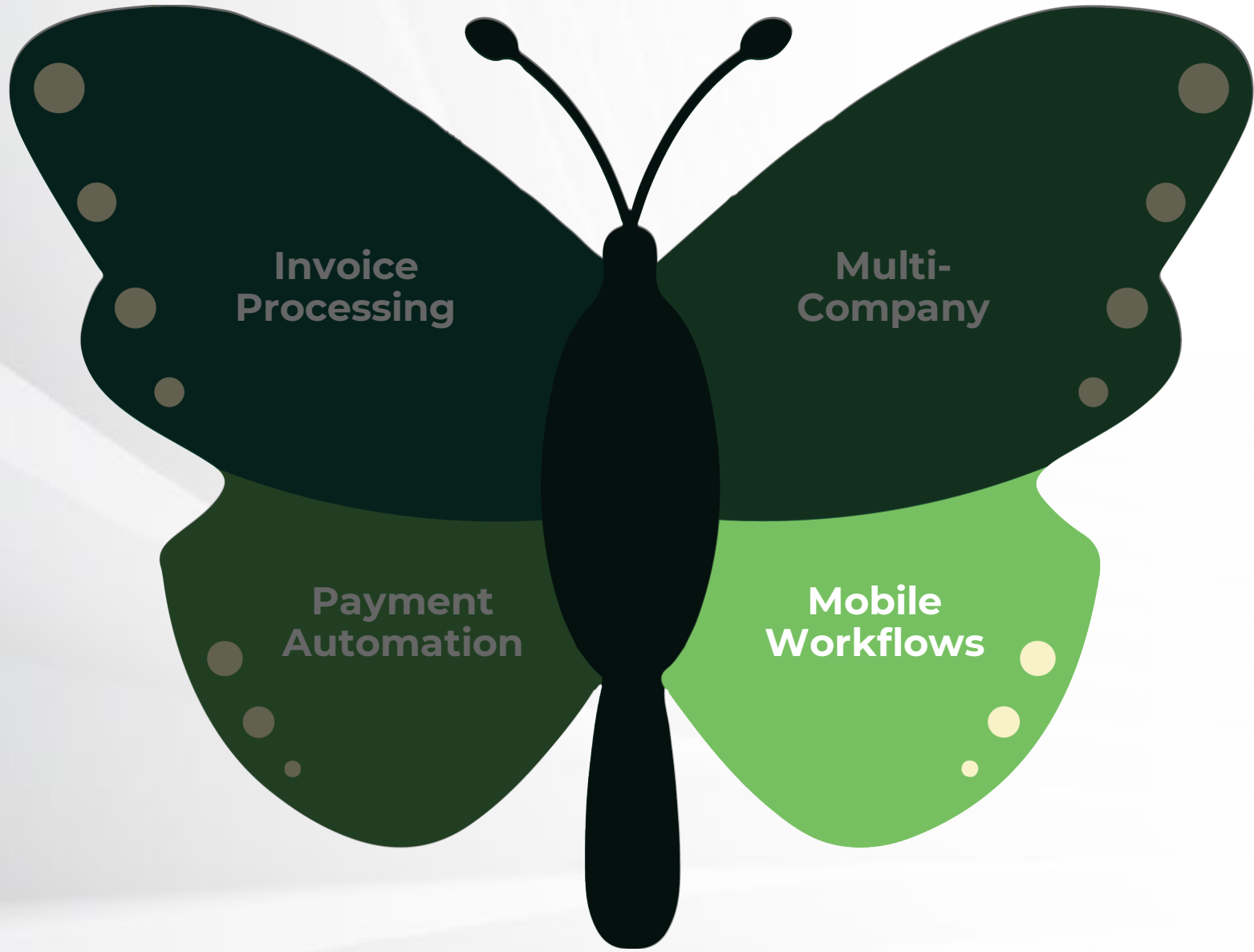
Multi-
Company

Payment
Automation

Mobile
Workflows



75% AP staff time saved on payment day

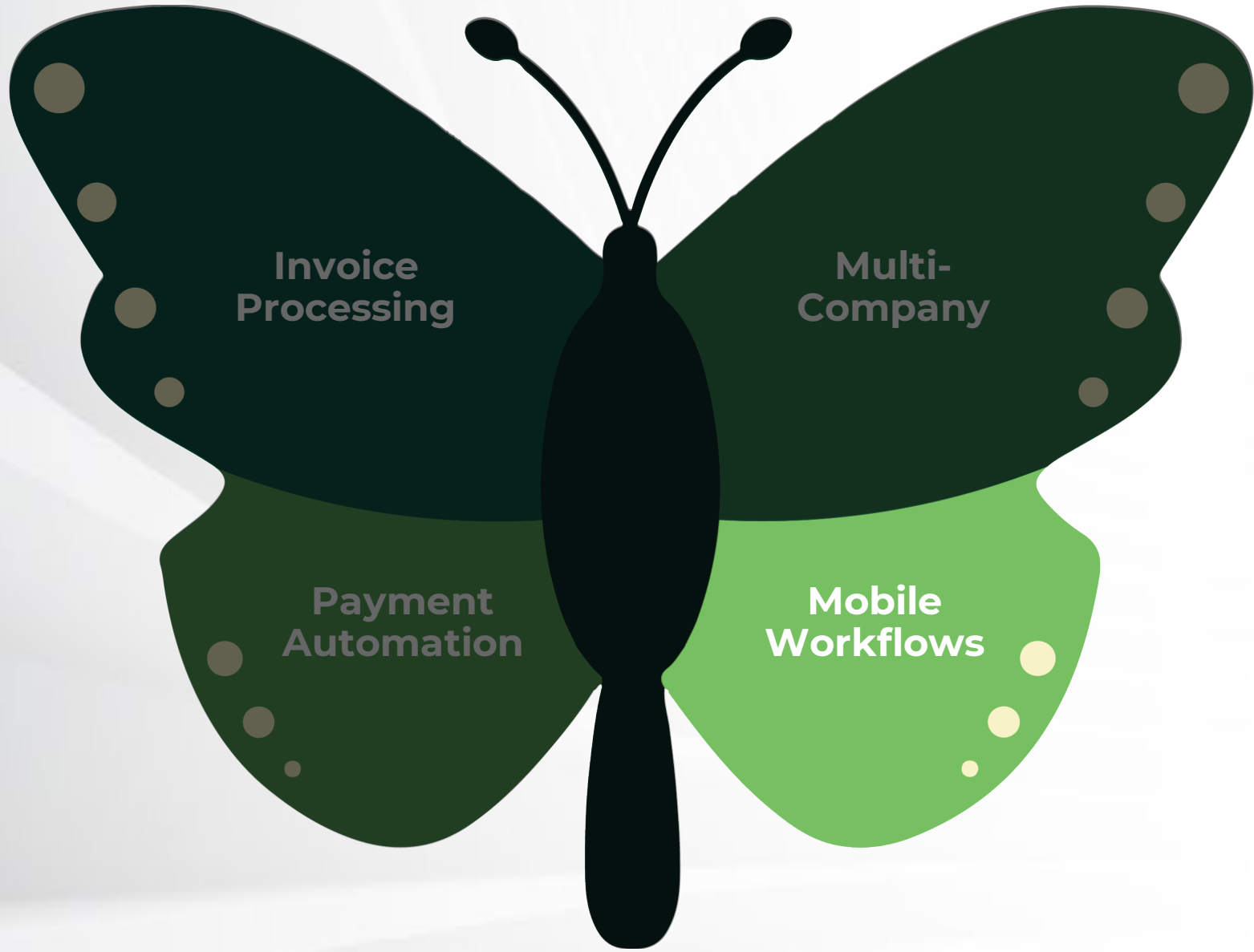


Invoice
Processing

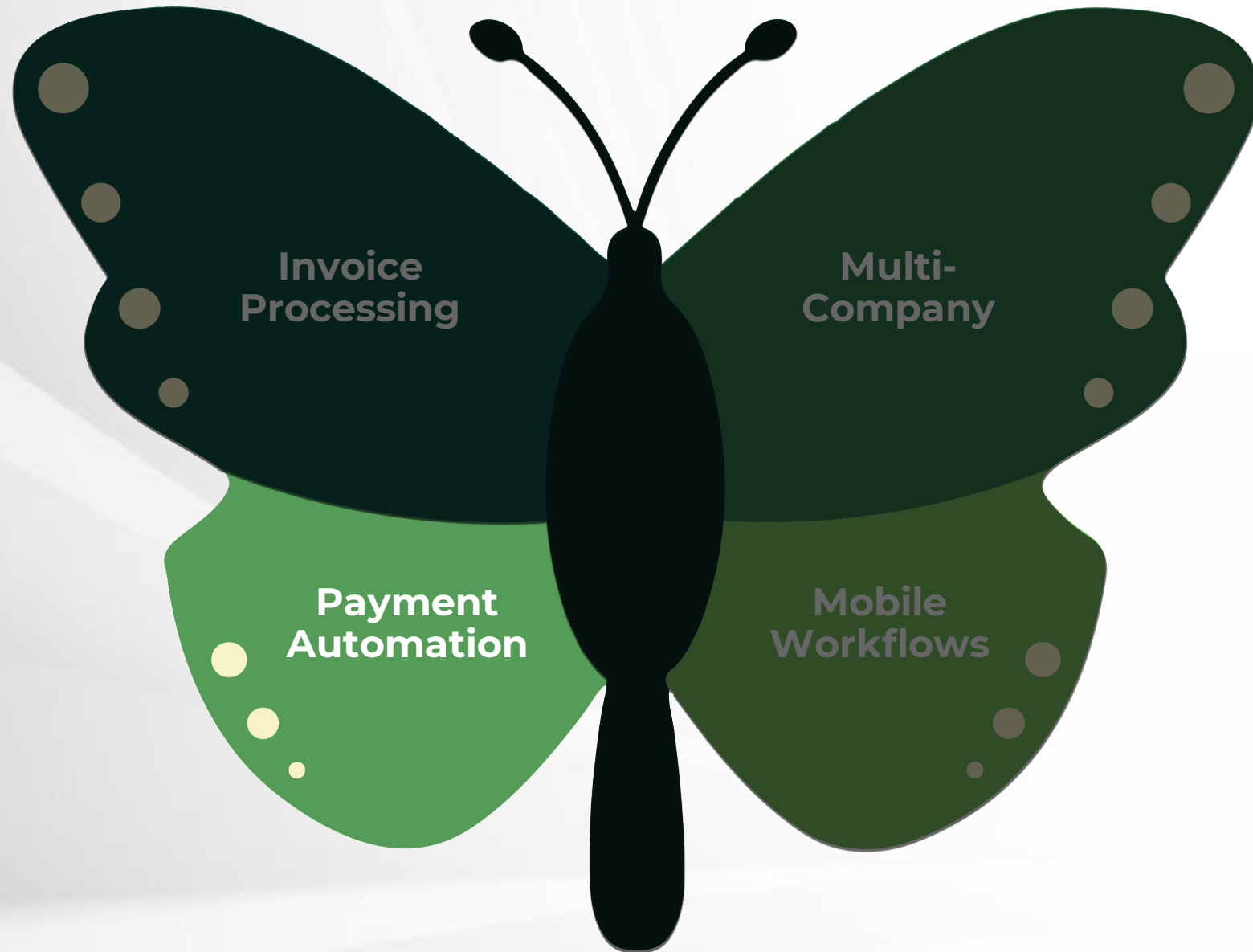
Multi-
Company

Payment
Automation

Mobile
Workflows



100% more flexibility in approving invoices and payments

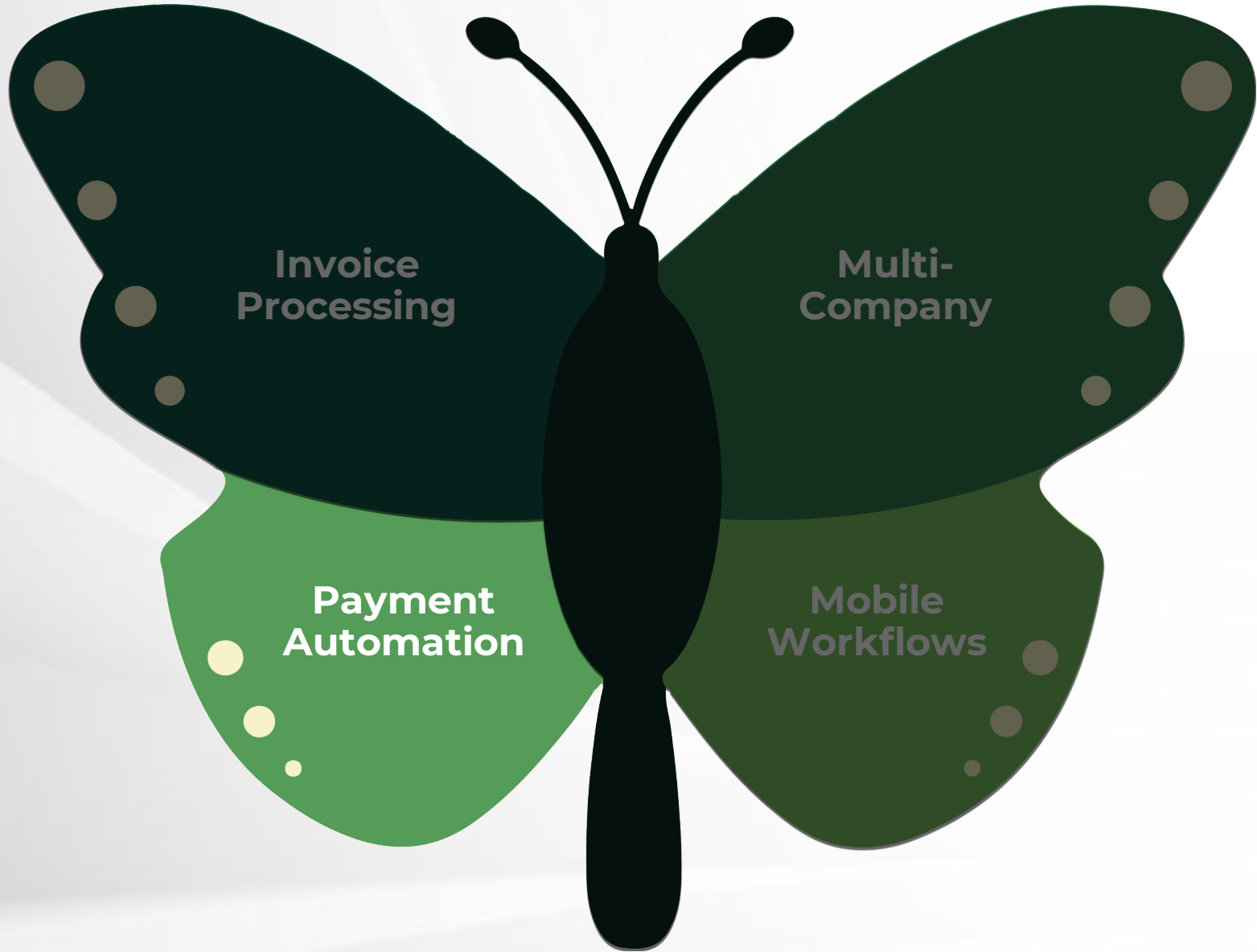


Invoice
Processing

Multi-
Company

Payment
Automation

Mobile
Workflows



2/3 vendors converted
from check to electronic
payments

Why Mekorma?

Here's what made us successful for our client:

- Mekorma functionality embedded right within their ERP system
- Mekorma integrated with their existing workflows
- Intuitive user experience helps the team learn and use automation features easily.
- Our responsive Professional Service and Support Teams
- Our self-service support portal
- Experience with over 5000 customers in Dynamics





\$148K received to-date via rebates



Sustainable, rapid growth—3 companies acquired with no additional AP overhead



\$30K/yr saved in the AP function



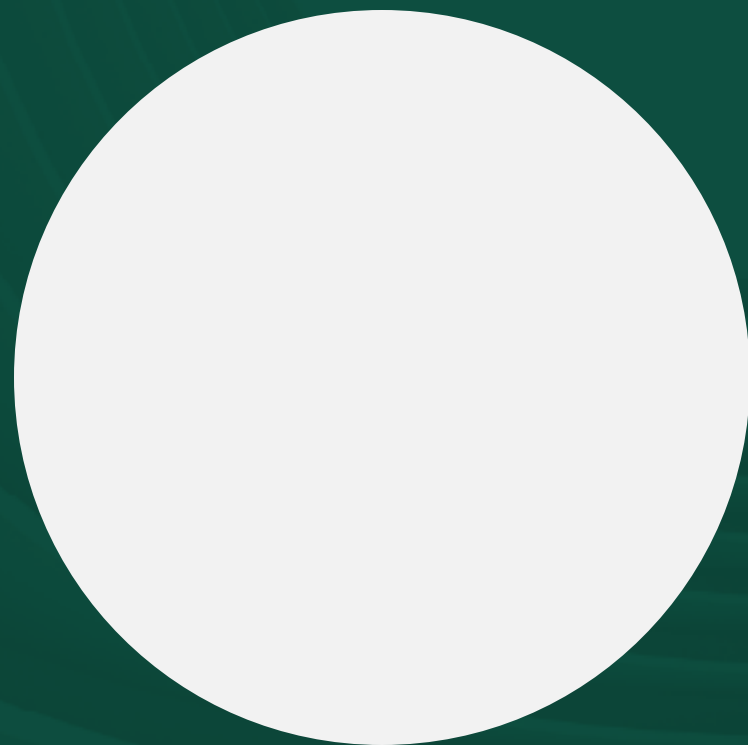
Accounting Manager received a promotion



No need to commute to office on payment day



3 trees saved each year, and counting



MEKORMA

Payment Hub for D365 Business Central

Join the Early Access Program

Be at the forefront of financial management with our early access release of Mekorma Payment Hub, offering advanced check printing and multi-company processing features. Join now to be an integral part of this evolution!



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THANK YOU

Any Questions?

Come visit us at **Table #46** and get an **AP Health Check**



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