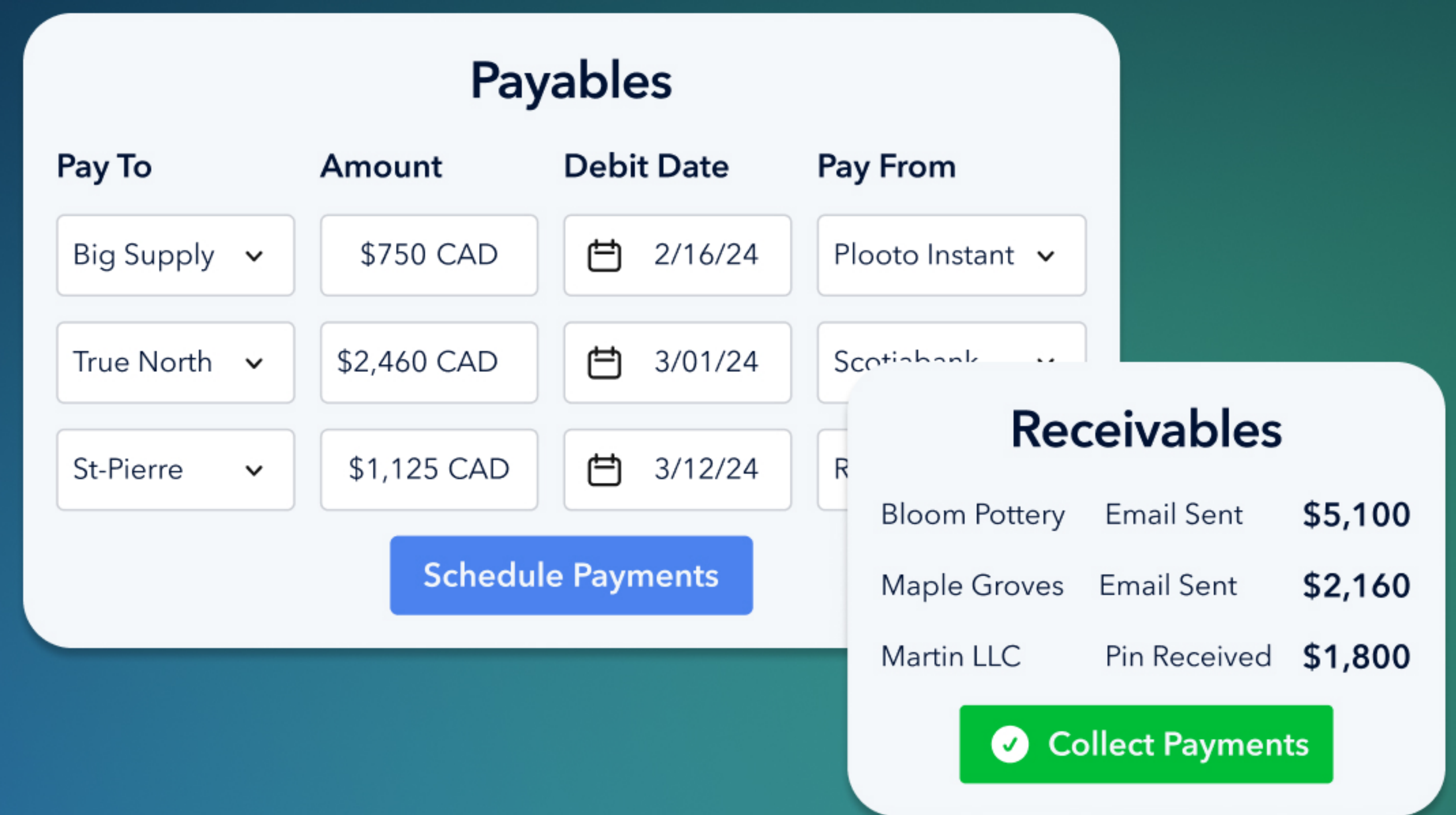


# Plotoo

## Automating payments means time saved for everyone







Plotoo's payment automation platform helps accounting firms and their clients manage their AP and AR all in one place.







## Expand your services with Plotoo


Plotoo's cloud-based platform lets you automate invoice entry, payables, receivables, and approval workflows in one place. Integrations with leading accounting software like QuickBooks Online and Desktop, Xero, and NetSuite, mean you'll never have to manually reconcile your clients' books again.

## Why accountants and bookkeepers love Plotoo

-  **Time savings**  
Automate non-billable activities and save time that you can spend on growth.
-  **Professionalize and expand**  
Be your client's one-stop shop with a competitive, full-service offering.
-  **A personal relationship**  
Our customer success managers provide hands-on guidance and training as you onboard your clients.
-  **Error elimination**  
Two-way sync eliminates errors and increases accuracy, while protecting your reputation.
-  **Risk reduction**  
Approval rules and audit trails ensure payments aren't completed without client approval.
-  **Stay competitive**  
Offer a compelling end-to-end service that helps you acquire, retain, and get more value from clients.


## Why your clients will love Plotoo, too


-  **Cash flow confidence**  
Post-dating payments and real-time tracking allows you to easily maximize their cash flow.
-  **Focus on what matters**  
Safely delegating payments without sharing banking credentials means more time focused on growth.
-  **Secure payment practices**  
Securely manage vendor and customer banking information (no more spreadsheets, no more void cheques).
-  **Easy onboarding**  
Get up to speed on their cash flow through an intuitive, easy-to-use experience.



**Varun Sehgal**  
Partner at Think Accounting

"For any business with a recurring fee model, Plotoo is a no brainer. It eliminates paper, smooths out cash flow, reduces AR headache, and so much more. For modern businesses running in the cloud, Plotoo is a must!"

 **15 hrs** saved / month

 **\$2,500** saved / month



# Plooto



**10K+**  
Customers



**800+**  
Accounting firms



**2.4m+**  
Transactions annually



ISO 27001  
certified



Microsoft Azure  
for all data hosting

**1001**

TDS and SSL  
data encryption



2FA: Two-Factor  
Authentication

## Pay with

ACH/EFT/Cheques for Domestic or Cross-Border transactions within the US, Wires for International payments, and Commercial Credit Card. Plooto Instant exists for CAD/USD transfers to accelerate payment timelines.



## Get paid with

ACH/EFT for Domestic Transactions or Cross-Border transactions within the US, Credit Card for Domestic or International payments. Recurring and Pre-Authorized Debit Agreements options are available for all receivable methods.



## Choose the **right solution** for you and your clients

**Go**

**\$9**

per client / month

Manage low client payment volumes  
with basic approval workflows

- ✓ Automatic two-way sync with QuickBooks Online and Xero
- ✓ Streamline invoice processing with Plooto Capture (OCR)
- ✓ Set a basic approval workflow with 1 designated approver
- ✓ Conduct up to 5 domestic transactions per month from 1 connected bank account
- ✓ Use a commercial credit card to pay vendors via ACH, EFT, or cheque with Pay by Card
- ✓ Send international payments with competitive exchange rates
- ✓ Accept payments with Pre-Authorized Debits (PAD) and credit card
- ✓ Invite and collaborate with an unlimited number of clients and users

*Go available for client accounts only*

**Grow**

**\$32**

per client / month

Scale payment and approval operations  
with custom workflows

Everything on Go, plus:

- ✓ Automatic two-way sync with QuickBooks Desktop
- ✓ Set custom approval workflows with multiple rules and unlimited approvers
- ✓ Connect and transact from an unlimited number of bank accounts
- ✓ Conduct an unlimited number of transactions per month
- ✓ No transfer fees on international payments
- ✓ Save on transactions with optional payment packages

**Pro**

**\$99**

per client / month

Implement complex payment operations  
with advanced controls

Everything on Grow, plus:

- ✓ Set controls on who can make changes to payment methods
- ✓ Set controls on who can make changes to approval rules
- ✓ Manage user access with single sign-on (SSO)
- ✓ Access priority customer support



Looking for Oracle NetSuite?  
Connect with our sales team.

### Unlock special savings

- Receive a **free Plooto subscription** for your firm by adding just 3 clients to Plooto
- Offer **up to a 20% discount on a Plooto subscription** to all your clients

Restrictions apply. Learn more by visiting [plooto.com/pricing](https://plooto.com/pricing).

Learn more at [plooto.com](https://plooto.com)



★★★★★



★★★★★



★★★★★

