Acumatica
The Cloud ERP

Save Time and Improve Data Accuracy with Automated Bank Feeds

Connect Acumatica to more than 14,000 financial institutions. Schedule bank transaction imports to Acumatica. Link savings, checking, and corporate credit card accounts to cash and expense accounts inside Acumatica. Eliminate manual reconciliation and matching with default settings, artificial intelligence, and machine learning.

SCHEDULED IMPORTS
Schedule bank feed imports for savings, checking, corporate credit cards, investments, loans, or other financial accounts. Connect to multiple banks with varying import schedules per account.

SMART MATCHING
Powered by artificial intelligence with embedded machine learning, real-time activity downloads provide automated smart matching to existing transactions. Dashboards and reports highlight transactions that require attention.

SECURE ACCESS
Bank Feeds is powered by Plaid, the industry-leading connection platform used by thousands of financial institutions and businesses globally. Connections and data transfers use Multi-Factor Authentication (MFA), Advanced Encryption Standard (AES 256), and Transport Layer Security (TLS) for all information exchanges.

> "It used to take us hours to keep up with the volume of transactions from two different banks and two different credit card companies … Now everything imports automatically every morning."
>
> -Jessica Pace, Director of Operations, SB Tactical

Establish secure connection credentials to safely and securely connect to your financial institutions to automate bank feeds and account reconciliation.

KEY BENEFITS

ELIMINATE MANUAL IMPORTS
- Schedule bank feed imports to occur automatically based on flexible, user-defined schedules.
- Smart matching powered by Artificial Intelligence with Machine Learning eliminates mundane reconciliation for recognized transactions.

SETUP IN MINUTES
- Connect to financial institutions in minutes with your corporate or personal credentials.
- Link financial accounts to General Ledger accounts with a few clicks.
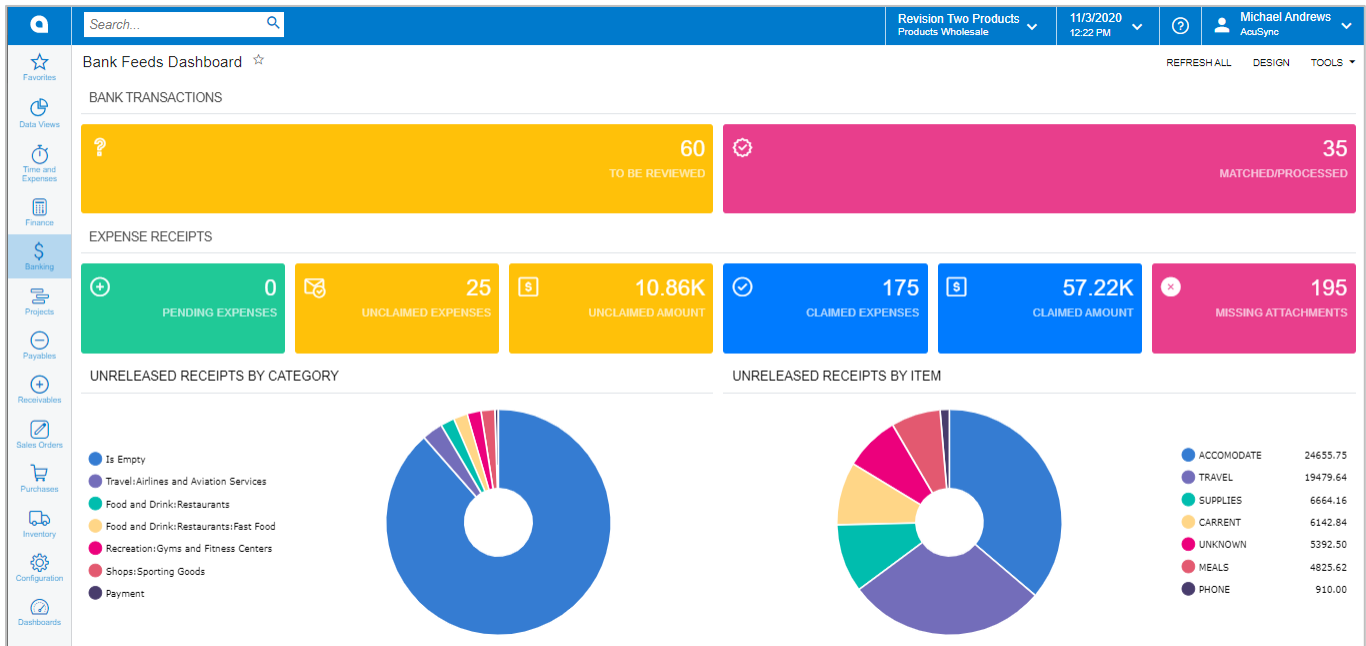
STREAMLINE EXPENSES
- Use Bank Feeds with Advanced Expense Management to automate expenses for corporate credit cards.
- Advanced Expense Management streamlines business expenses with flow through to customer projects for review and customer billing.

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BANK FEEDS FEATURES AND CAPABILITIES

Bank Integration	Powered by Plaid, Bank Feeds supports over 14,000 financial institutions globally.
Secure Connections	Multi-Factor Authentication (MFA), Advanced Encryption Standard (AES 256), and Transport Layer Security (TLS) ensures safety and security for all information exchanges.
Transaction Matching	Default settings, artificial intelligence, and machine learning automatically match bank transactions with Acumatica transactions.
Manage by Exception	Unmatched transactions are conveniently displayed in dashboard views for review and manual matching or categorization in Acumatica.
Audit Logs	Bank feed updates are logged at the record and field level in Acumatica, providing traceability for all financial data transactions.
Flexibility	Advanced mapping and custom data provider connections provide flexibility to automate virtually any business scenario.

Manage expenses with configurable dashboards, real-time data, embedded analytics, and exception-based notifications.

ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations. **Business Resilience. Delivered**.

To learn more how Acumatica can help you manage your business, contact Summit Business Systems today: 905-771-7090 | summitbusinss.com

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