




# Single Invoice Billing

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GreatAmerica Financial Services  
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## Agenda

- Introduction to GreatAmerica
- Single Invoice Billing Options
- Flat Rate - Things to Consider

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## HELPING YOU GET THERE SINCE 1992

- Largest independent family owned small-ticket equipment finance company in the United States
- Tenured Leadership Team
- 600 Employees
- Industry Immersed; Customer Centric

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## Adding value

<b>PathShare</b> HR SERVICES	<b>COLLABRANCE</b>	<b>INTEGREAT</b> WEB SERVICES
<b>SERVICE LEADERSHIP INDEX</b>   <b>SLIQ</b> (ROI, WORK)	<b>S-L GAMIT</b> GROUPS	<b>info-zone.com</b>
<b>HaaR</b>	<b>DocuSign</b>   <b>SNAPSHOT</b>	<b>Partnership Program</b>

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## Innovation Is Not Enough

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## INTEGRATE™ WEB SERVICES

Interact with GreatAmerica while remaining in your primary business application  
(Enhances ease of scaling and accuracy)

<b>Sales</b>	<ul style="list-style-type: none"> <li>• Calculate payments/rate factors</li> <li>• Submit/update/status of credit applications</li> <li>• Generate and electronically sign lease documents</li> <li>• Submit invoices/CPI worksheets for funding</li> </ul>
<b>Dealer Money</b>	<ul style="list-style-type: none"> <li>• Submit/extract meter readings/invoice numbers</li> <li>• Insert additional dealer charges to bill</li> <li>• Post remittance money</li> </ul>
<b>Other</b>	<ul style="list-style-type: none"> <li>• Create buyout/upgrade quotes</li> <li>• Return invoice and agreement images</li> <li>• Retrieve portfolio information</li> </ul>

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## Helping Our Partners

















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**ECI e-automate**

	FUNCTIONALITY	BENEFITS	TIME SAVINGS	IMPROVED ACCURACY
<b>Invoice &amp; Meter Submission</b>	Dealers create invoices in their system and GreatAmerica does the rest. Three times a day, we extract invoice and meter information.	<ul style="list-style-type: none"> <li>No additional steps for the dealer beyond their own invoicing process</li> </ul>	X	X
<b>Automated Cash Posting</b>	Automatically posts remittance money to e-automate.	<ul style="list-style-type: none"> <li>Saves time because dealer only needs to post exceptions</li> <li>Get your money faster with daily remittance</li> </ul>	X	X

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## Accuracy Is The Ultimate Goal

	FUNCTIONALITY	BENEFITS	TIME SAVINGS	IMPROVED ACCURACY
<b>Usage Validation</b>	Compares our independent usage calculation to the invoiced amount in e-automate and we notify the dealer of discrepancies.	<ul style="list-style-type: none"> <li>Stops billing errors before an invoice is ever sent to a customer</li> <li>Simplifies the remittance process when dollar amounts match</li> </ul>	X	X
<b>Maintenance Validation</b>	Compares the maintenance amount invoiced within e-automate to what is billed by GreatAmerica and we	<ul style="list-style-type: none"> <li>Decreases billing errors by correcting contract info</li> </ul>	X	X
<b>Contract Validation</b>	Compares contract details in e-automate to GreatAmerica and we notify the dealer of discrepancies.	<ul style="list-style-type: none"> <li>Eliminates billing errors, including future ones as a result of escalations</li> <li>Ensures accurate contract set-up</li> </ul>		X

*"Our partnership with GreatAmerica not only helps us grow, they've also been an instrumental part of our operational efficiency. Our technology integrations have freed up the equivalent of nearly one headcount, allowing us to scale faster and more profitably."*



**Scott Dewar**  
Executive Vice President  
All Copy Products

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## New Compass Integration


Seamlessly Interact with GreatAmerica within Compass Sherpa!

-  Calculate monthly payments based on your specific programs for greater accuracy
-  Submit applications directly into the GreatAmerica credit system for increased efficiency
-  Easily check the status of any submitted credit application
-  Generate lease documents automatically
-  **NEW:** Send digital documents for easy signing
-  Manage your lease portfolio with proactive alerts including identifying upgrade opportunities and end of term quoting

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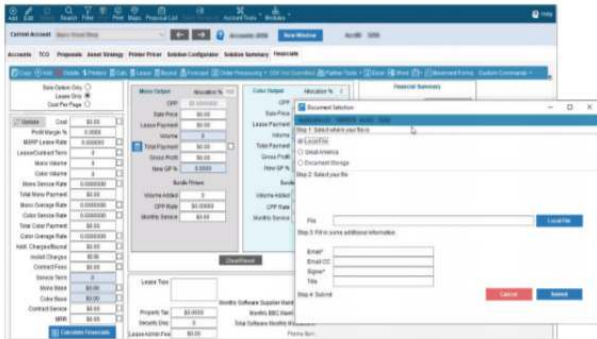
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## Digital Signature Feature

*NEW: Send Digital Signature*




- Stay in your own system.
- Eliminate unnecessary steps.
- It's free!


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## Bundled Billing – Experience & Stability You Can Count On



**Over \$2 Billion**  
In earning  
assets




**223,460 Contracts Serviced**  
101,888 of them being  
bundled agreements  
(\$392 million passed through in 2019)




**Uninterrupted**  
origination, earning  
asset and revenue  
growth since inception

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## Single Invoice Billing Options

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## Are you providing a personalized experience?

Purposeful Growth	Immersive Innovation
Frictionless Experience	Rewarding Work

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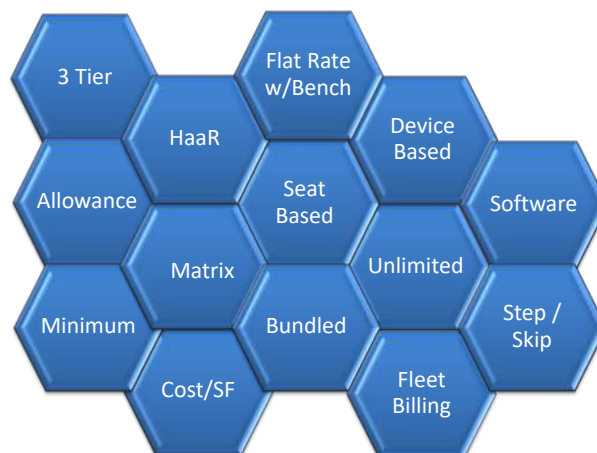
## Single invoice solutions

To lead the industry in creating programs providing single invoice solutions to meet end users' needs and match your go-to-market

### 3 primary approaches

- Variable Billing
- Situational Needs
- Flat Rate Billing

**So many options to  
create a single  
invoice!**







## Let's Talk Flat Rate

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## Flat Rate

- Utility Companies
- Mobile Phone Companies
- Law Firms
- Automotive Repair/Service Companies
- Car Wash Companies

*Consumers understand the concepts and appreciate the ease*

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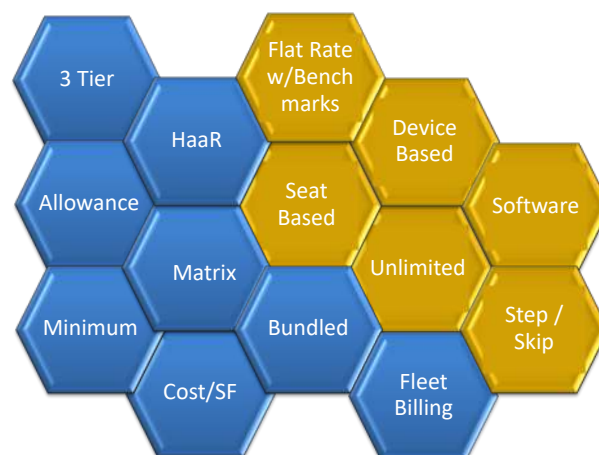
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## Why Flat Rate Billing?

- Predictable monthly spend for end users
- Protect revenue in declining print environments
- Easy to layer other products and services
- Reduced administration for end user and you  
– *Pros Elite: \$1mm revenue/admin*

## Many Flat Rate Options








## Standard Invoice

Invoice Detail				
Agreement 003-0123456-000: Equipment Description		Amount	Tax	Total
Ref./PO #	1 Standard Payment	610.42	0.00	610.42
				<b>\$610.42</b>

**If end user exceeds, benchmarks**

3 Excess Usage For Mono Benchmark	3.00	0.18	3.18
4 Excess Usage For Color Benchmark	48.00	2.88	50.88


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## Unlimited Clicks

- Truly “unlimited”
- No protection in the finance agreement
- Requires understanding of service and supply agreements



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[illegible]

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## Seat Based Billing

(SBB) An agreed upon payment based on a specified number of users per month that covers hardware, service and supplies for all covered devices in the end users environment.



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## SBB Agreement

EQUIPMENT AND PAYMENT TERMS			<input type="checkbox"/> SEE ATTACHED SCHEDULE	
TYPE, MAKE, MODEL NUMBER, SERIAL NUMBER, AND INCLUDED ACCESSORIES	NOT FINANCED UNDER THIS AGREEMENT	BEGINNING METER READING		
		BLACK	COLOR	
8 Canon ImageRunners	<input type="checkbox"/>	0	0	
12 HP Printers	<input checked="" type="checkbox"/>	8213	2259	
	<input type="checkbox"/>			
	<input type="checkbox"/>			

EQUIPMENT LOCATION:

TERM IN MONTHS: 36 MONTHLY BASE PAYMENT AMOUNT: 3,668 (PLUS TAX) BASE NUMBER OF USERS: 115

MONTHLY CHARGE PER ADDITIONAL USER: 31.90 (PLUS TAX)

**ADDITIONAL CHARGES FOR IMAGES IN EXCESS OF BENCHMARKS**  
MONTHLY PER USER IMAGE BENCHMARKS: MONOCHROME: 960 COLOR: 240

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## Standard Invoice

### Invoice Detail


Agreement 003-0123456-000: Equipment Description		Amount	Tax	Total
Ref./PO #	1 Standard Payment	610.42	0.00	610.42
				<b>\$610.42</b>

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## What Should You Consider As You Create Your Flat Rate Program?

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## Dealer Benefits

- Differentiation
- Bundled payment protection (rent + svc)
- Reduced time of internal resources
- Protection from decreases in print volume

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## Benefits To The End User

- Simplicity!
- Predictable cost/easy to budget
- Fewer invoices to process (savings!)
- Ease of doing business
- Comprehensive solution for all your products and services

***Thus ascribing more value to your brand***

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## Risks

- Incorrect print estimates (underpriced)
- Allocation of mono-to-color shifts
- Lack of flexibility to make corrections
- Significant print decreases (overpriced)
- Multi-device environments w/out rules

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## Frequent Discussion Points

- Benchmarks and/or Thresholds
- Escalations or Corrections
- Flat rate for printers only
- Clients to target and avoid
- Sales Rep Compensation

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## Who Is Doing It?


### Konica Minolta's One Rate

- Branch only at this time
- Working with Nexera on a DaaS offering

### Sharp's Project S Rate

- Silent since Sharp show in October


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## Where Can I Get More Help?



- **GreatAmerica Rep**
- **Nexera**
- **Manufacturer Reps**
- **Clover**

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## From Business Modeling to Sales Mentorship



- **Experienced:**
  - SBB Road Shows with GAL
  - SBB Dealer Training & Mentorship
  - Helped Pioneer Flat-rate & SBB
- **Focused:**
  - Flat-rate programs is all [www.westmcdonald.co](http://www.westmcdonald.co) does!
  - Driven to help Office Equipment Dealers to win with flat rate


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## Contact West to Learn More

 [www.westmcdonald.co](http://www.westmcdonald.co)

 [flatrate@westmcdonald.co](mailto:flatrate@westmcdonald.co)

 (647)992-6775

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## Questions?




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