# PivotEQ
From Pivot Payables

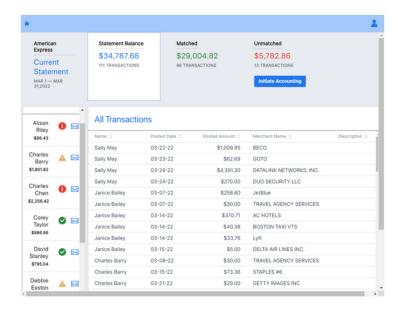💳 CREDIT CARD RECONCILIATION MADE EASY

Welcome to PivotEQ from Pivot Payables.

PivotEQ is a Credit Card Reconciliation tool for SAP Concur Expense customers using Company Paid Credit Cards.

# PivotEQ: How does it work?

**01**

Spender uses their Company Paid Credit Card

**02**

Spender files expenses on Expense Report

PivotEQ Process:

1 - Spender uses their Company Paid Credit Card

2 - Spender files expenses on their Expense Report in SAP Concur

3 - PivotEQ automatically compares Credit Card transactions from SAP Concur to the Card Statement

4 - PivotEQ automatically sends customized email reminders to cardholders with outstanding transactions

5 - PivotEQ uses Intelligent Accounting to create Journal Entries for the Accruals, AND correcting entries once the transactions are posted the following month

# PivotEQ:
# Transaction View



PivotEQ Transaction View (User Interface)

Users can review the full Statement Period, Matched Expenses, and Unmatched Expenses. When they are ready, they can Initiate Accounting to prepare the Journal Entries for posting.

# PivotEQ:
# Email Reminders



PivotEQ Email Reminder Examples
Email Highlights:
- Fully customizable
- Timeline based (can be triggered to send based on Statement End Date and/or Statement Accounting Deadline
- Visual cues
- Unique greetings
- Company-branded
- Specific call-to-action
- Direct link to login to SAP Concur
- 'Why we ask' Accounting blurb
- Progressive urgency

**TESTIMONIAL**

**"PivotEQ has had tremendous impact!**
- **Previous process, manually review expense reports with unsubmitted transactions – then copy into an email to each individual.**
- **I would do this weekly until they submitted!**
- **Now employees read the PivotEQ emails and get the expense reports submitted on time!"**

                        **- Carolyn Conroy, Finance Manager, Vantage Partners**

Case Study/Customer Success Story
Vantage Partners is an SAP Concur Expense customer with ~54 cardholders.
They shared the following on the impact PivotEQ has made for their business:
"PivotEQ has had tremendous impact!
Previous process, manually review expense reports with unsubmitted transactions – then copy into an email to each individual.
I would do this weekly until they submitted!
Now employees read the PivotEQ emails and get the expense reports submitted on time!"
-  Carolyn Conroy, Finance Manager, Vantage Partners

Carolyn explained that previously, it was common to have ~10 unsubmitted card expenses for each cardholder at the end of the month. That's 540 transactions!
In month two of using PivotEQ, they had 20 outstanding transactions.
By month three, just 10.
In month four, 2 transactions.
And by their fifth month, only a single transaction was outstanding.
All this, without Carolyn having to lift a finger!