

PROJECT DEVELOPMENT

Automation: The Modern Employee





Cole Long

Project Development Lead



Peter Lambert

Project Developer

1

Remove tedious routine tasks

2

Speed, efficiency, fewer errors

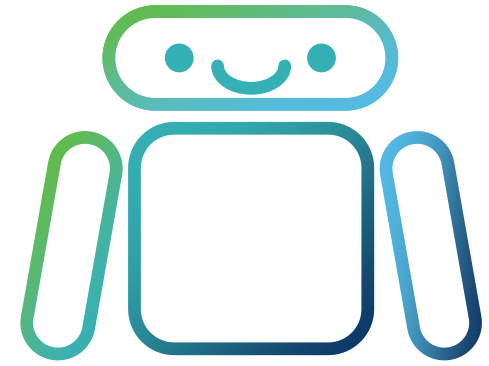
3

Where we connect

4

How do you hire one?

ActivBot



Meet your newest employee



Reliable

- Never misses a day
- Same way, every time



Accountable

- Auditable logs
- Predictable results



Easy to onboard

- You describe the chore
- We build and test it

USE A BOT WHEN

It repeats

You need exact details

The rules are written

USE AI WHEN

It's a one-time ask

A summary will do

You're still deciding the rules

AI tells you what to do. A bot does it.

AI VS AUTOMATION EXAMPLE

A stack of vendor invoices

USE AI

- Summarizes each invoice
- Drafts the predicted coding
- Results vary run to run

A draft for someone to check

USE A BOT

- Applies your rules
- Posts to the ledger
- Logs every step

Posted. Exceptions named.

Remove tedious routine tasks

1

Send W-9 Form

2

Change Case

3

Reduce Attachment Size

4

Extract Attachments

5

AP/AR Batch Processing

SEND W-9 FORM

► Pick the vendors

► Bot emails the W-9

► AP note logged on each

Form W-9 (Rev. June 2026) Department of the Treasury Internal Revenue Service		Request for Taxpayer Identification Number and Certification Go to www.irs.gov/FormW9 for instructions and the latest information.		Give form to the requester. Do not send to the IRS.	
Before you begin. For guidance related to the purpose of Form W-9, see <i>Purpose of Form</i> , on page 2.					
1 Name of entity/individual. An entry is required. (For a sole proprietorship or disregarded entity, enter the owner's name on line 1, and enter the business/ disregarded entity's name on line 2.)					
2 Business name/disregarded entity name, if different from above.					
See Specific Instructions on page 3.	3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. ☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate ☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. ☐ Other (see instructions)			4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 4): Exempt payee code (if any) Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) (Applies to accounts maintained outside the United States.)	
	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions ☐				
	5 Address (number, street, and apt. or suite no.). See instructions.			Requester's name and address (optional)	
6 City, state, and ZIP code					
7 List account number(s) here (optional)					
Part I Taxpayer Identification Number (TIN)					

SEND W-9 FORM

ActivityHD Explorer - Vendors for Demo Casa Blanca CL - Cole Long

Activity System (cnx00-ahd1)

CoNetrix

Demo Casa Blanca CL

Administration

General Ledger

Bank Reconciliation

Accounts Payable

Vendors

Notes

Invoices

Payments

Government

Reports

Setup

Accounts Receivable

Contracts Processing

Fixed Assets

Payroll / Human Resources

Purchasing

Vendors for Demo Casa Blanca CL

Options: Personal

Filters: Column Filters

Code

COLIND

Altex

Testing

Supplier

Net15

2100-0-000...

56481584

63-58943...

9/

2/

1099 Generate Process Example Bot

AP Vendor->AR Customer

Create Note for Missing W9s

Email Vendors for Approval

Reduce Attachment Size

Send W-9 Form

UPFP AP Flash Report

Total: 2

Selected: 1 Balance: 0.00

Order: ▼Created

Hint: Send W-9 form to vendor contacts and create AP Notes

SEND W-9 FORM

Bot - Send W-9 Form for Demo Casa Blanca CL - Cole Long

Steps

Specify Options

Run Bot

View Results

 Answers:

Send W-9 form to vendor and create note record

1) If you include an email address in the Email Address field below then the email is sent to that single addressee. This should only be done for single vendors.

2) If you want to send a W-9 form to multiple vendors, then you should:

- Create Vendor records with Primary Contact and a email for that Primary Contact.
- Run this bot with multiple vendors selected to send W-9 form as an attachment.

3) When the contact responds with a completed W-9 form, then record Filing Status and Federal ID.

4) Attach the completed form to the W-9 Note for safekeeping and documentation.

Email Address:

Signature:

Recall in Days from today:

Banner Options
Optionally set a Banner Type to display a banner on the W-9 Note record. Leave blank for no banner.

Banner Type:

<< Back

Next >>

Finish

Cancel

 **InterActiv**
CONFERENCE

SEND W - 9 FORM

 Bot - Send W-9 Form for Demo Casa Blanca CL - Cole Long

Steps

- Specify Options
- Run Bot
- View Results



Notes for Demo Casa Blanca CL

Options:

Personal

Filters: Lookup:

Number	Note Date	Recall Date	Type	Description
33	9/14/2026 10:30 AM	9/24/2026	W-9	W-9 Form

Total: 1 Selected: 1 Order: Number

<< Back

Next >>

Finish

Cancel

SEND W - 9 FORM

Note - "33" for Demo Casa Blanca CL - Cole Long

Note for Demo Casa Blanca CL

Number: Type: W-9 Form

Description:

Note Event

Date: 10:30 AM

Recall:

User:

References:

Vendor - COLIND

Banner

Caption: Type:

Note:

sent email regarding W-9 form on: 09/14/2026 10:30:18 to: dong@accountingware.com at dong@accountingware.com

Note Custom Attachments Change Logs Other Developer

Edit

SEND W-9 FORM

Vendor - "COLIND" for Demo Casa Blanca CL - Cole Long

 New Edit Save Report Previous Next Bots

 Missing W-9 Form, Recall Date 09/24/2026 (Note: 33)

Vendor for Demo Casa Blanca CL

Code: COLIND **Description:** Cole Test

Class
| | ▶

Identification
Customer #: |
Filing Status: | ▼
Federal ID: |
State ID: |
Other ID: |

Controls
☐ Miscellaneous ☐ On Purchase Hold
☐ Require PO Number ☐ On Payment Hold
Maximum Invoice: |
Maximum Payment: |

Invoice Grouping
☐ Location
☐ Location, AP Account
☐ One Invoice per Payment
☒ Process Default

Duplicate Invoice Controls
☒ Invoice Number
☐ Date
☐ Amount
☐ AP Account
Vendor Like: |

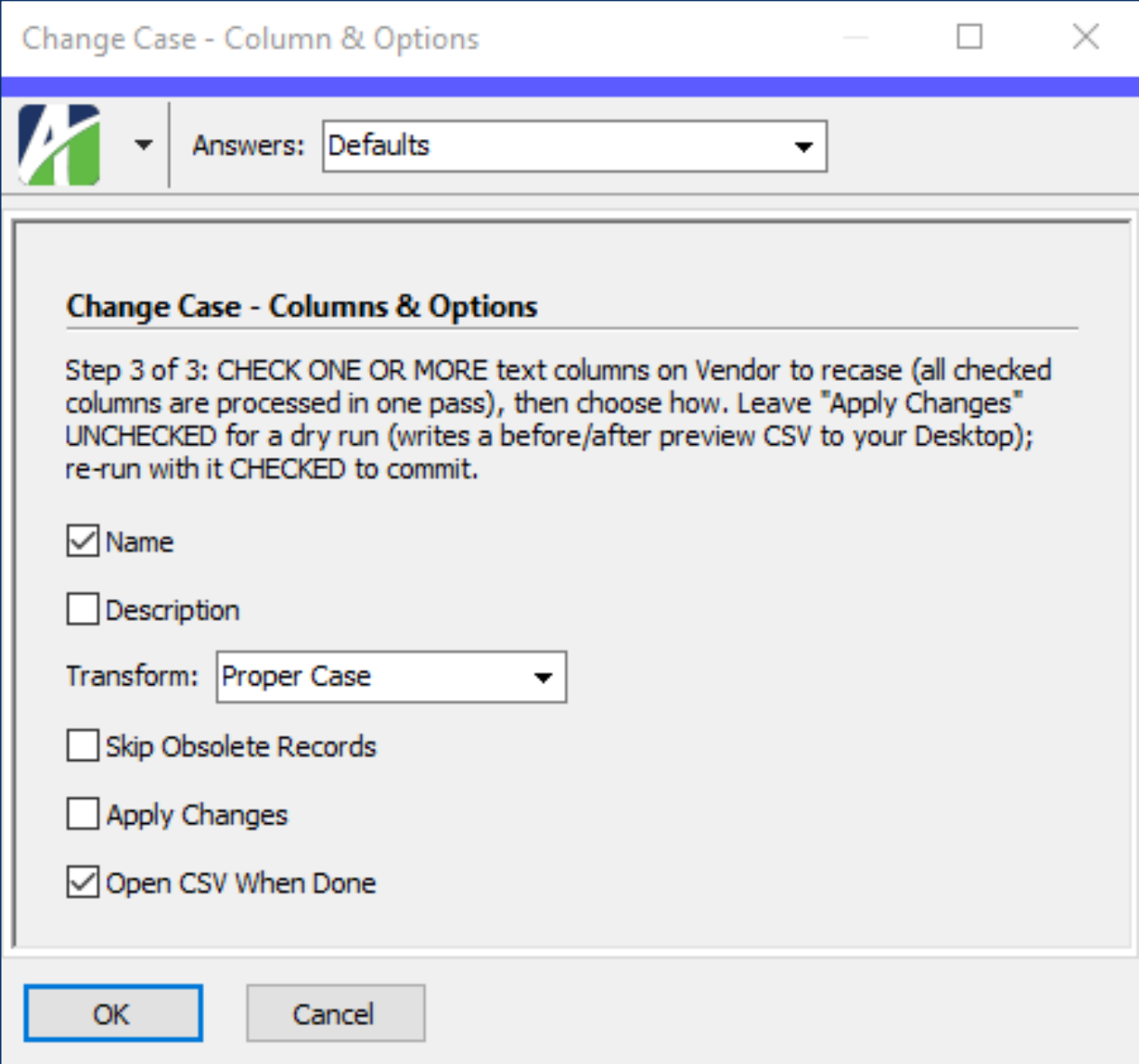
Last Contractor Report: | 
☐ Separate 1099 Form

Vendor Defaults PO Custom Data Links Locations Contacts Notes Invoices Payments 1099s Purchases Orders AI | ▶

Read

CHANGE CASE

Check the columns to recase, then pick the transform.



Change Case - Column & Options

Answers: Defaults

Change Case - Columns & Options

Step 3 of 3: CHECK ONE OR MORE text columns on Vendor to recase (all checked columns are processed in one pass), then choose how. Leave "Apply Changes" UNCHECKED for a dry run (writes a before/after preview CSV to your Desktop); re-run with it CHECKED to commit.

- ☒ Name
- ☐ Description

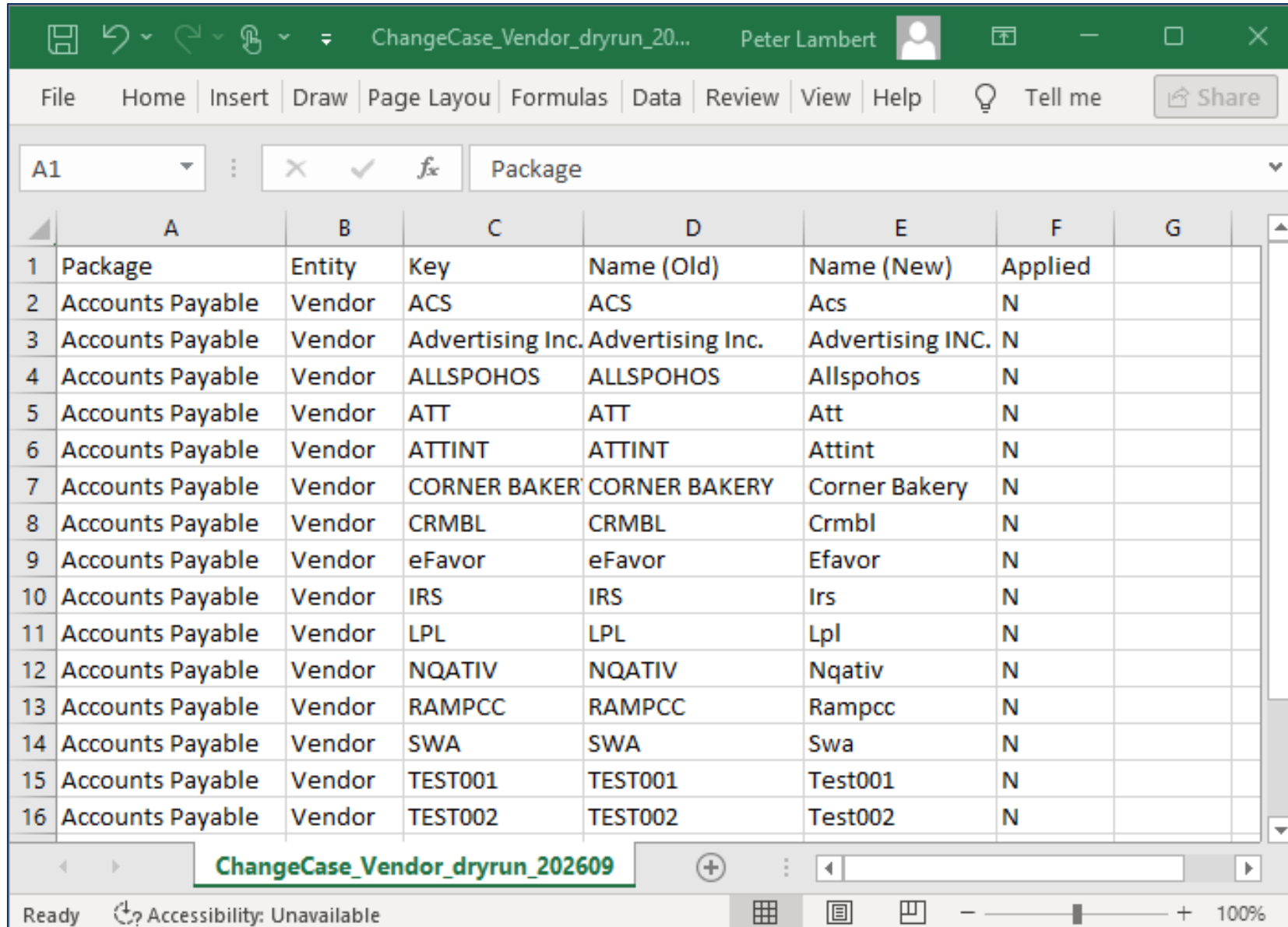
Transform: Proper Case

- ☐ Skip Obsolete Records
- ☐ Apply Changes
- ☒ Open CSV When Done

OK Cancel

CHANGE CASE

Dry run first: before and after in a CSV, nothing committed

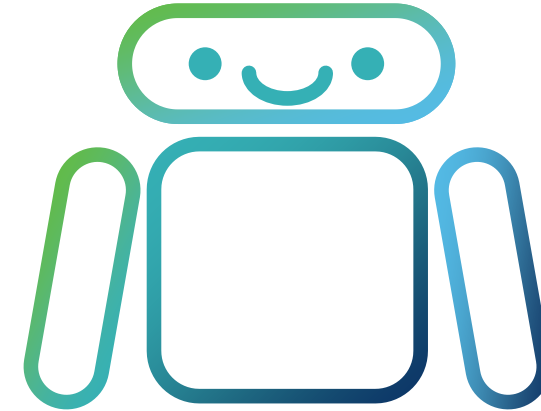


The screenshot shows a Microsoft Excel window with the title bar 'ChangeCase_Vendor_dryrun_20...' and the user 'Peter Lambert'. The ribbon includes 'File', 'Home', 'Insert', 'Draw', 'Page Layout', 'Formulas', 'Data', 'Review', 'View', 'Help', 'Tell me', and a 'Share' button. The active cell is A1, and the formula bar shows 'Package'. The spreadsheet contains a table with 7 columns: A (Package), B (Entity), C (Key), D (Name (Old)), E (Name (New)), F (Applied), and G (empty). The table lists 16 rows of vendor data, all with 'Accounts Payable' as the package and 'Vendor' as the entity. The 'Applied' column contains 'N' for all rows.

	A	B	C	D	E	F	G
1	Package	Entity	Key	Name (Old)	Name (New)	Applied	
2	Accounts Payable	Vendor	ACS	ACS	Acs	N	
3	Accounts Payable	Vendor	Advertising Inc.	Advertising Inc.	Advertising INC.	N	
4	Accounts Payable	Vendor	ALLSPOHOS	ALLSPOHOS	Allspohos	N	
5	Accounts Payable	Vendor	ATT	ATT	Att	N	
6	Accounts Payable	Vendor	ATTINT	ATTINT	Attint	N	
7	Accounts Payable	Vendor	CORNER BAKER	CORNER BAKERY	Corner Bakery	N	
8	Accounts Payable	Vendor	CRMBL	CRMBL	Crmbl	N	
9	Accounts Payable	Vendor	eFavor	eFavor	Efavor	N	
10	Accounts Payable	Vendor	IRS	IRS	Irs	N	
11	Accounts Payable	Vendor	LPL	LPL	Lpl	N	
12	Accounts Payable	Vendor	NQATIV	NQATIV	Nqativ	N	
13	Accounts Payable	Vendor	RAMPCC	RAMPCC	Rampcc	N	
14	Accounts Payable	Vendor	SWA	SWA	Swa	N	
15	Accounts Payable	Vendor	TEST001	TEST001	Test001	N	
16	Accounts Payable	Vendor	TEST002	TEST002	Test002	N	

The status bar at the bottom shows 'Ready', 'Accessibility: Unavailable', and a zoom level of 100%.

- ▶ Full-resolution scans attached to your records
- ▶ Recompresses in place
- ▶ Original kept as backup



REDUCE ATTACHMENT SIZE

AP Invoice - "Corpay - 11" for Demo Casa Blanca CL - Cole Long

AP Invoice for Demo Casa Blanca CL

Batch: Corpay Vendor: Altex Testing Invoice #: 161918
Entry #: 11 Description: Altex - 161918

Attachments

Scanned Invoice AS-104477.pdf (37 MB)

1 of 3

ACME SUPPLY CO
1200 Industrial Parkway, Suite 40
Lubbock, TX 79401

BILL TO
Casa Blanca Community College
Accounts Payable
PO Box 8810, Lubbock, TX 79408

QTY	DESCRIPTION
12	Copy paper, 20 lb, case
4	Toner cartridge, black
30	Binder clips, assorted
6	Hanging folders, letter, box
15	Ballpoint pens, dozen
10	Sticky notes, 12 pack

REC
AUG 18

Invoice Extra GL Custom Notes Asset Costs Attachments Change Logs Other Developer
Read

AP Invoice - "Corpay - 11" for Demo Casa Blanca CL - Cole Long

AP Invoice for Demo Casa Blanca CL

Batch: Corpay Vendor: Altex Testing Invoice #: 161918
Entry #: 11 Description: Altex - 161918 Date: 9/11/2026

Attachments

Scanned Invoice AS-104477.pdf (214 KB)

1 of 3

ACME SUPPLY CO
1200 Industrial Parkway, Suite 40
Lubbock, TX 79401

INVOICE
Invoice # AS-104477
Date 08/14/2026
Terms Net 30

BILL TO
Casa Blanca Community College
Accounts Payable
PO Box 8810, Lubbock, TX 79408

QTY	DESCRIPTION	UNIT	AMOUNT
12	Copy paper, 20 lb, case	12.00	\$10.00
4	Toner cartridge, black	80.00	356.00
30	Binder clips, assorted	3.15	94.50
6	Hanging folders, letter, box	24.80	148.80
15	Ballpoint pens, dozen	7.25	108.75
10	Sticky notes, 12 pack	11.40	114.00

RECEIVED
AUG 18 2026 AP

Invoice Extra GL Custom Notes Asset Costs Attachments Change Logs Other Developer
Read

EXTRACT ATTACHMENTS

Filter the records, select the ones you want

ActivityHD Explorer - AP Invoices for Demo Aspire - ACW - Peter Lambert

Activity System (CustAct2) Demo Aspire

Administration General Ledger Bank Reconciliation Accounts Payable Vendors Notes Invoices Payments Government Reports Setup Accounts Receivable Contracts Processing Fixed Assets Payroll / Human Resources Purchasing Sales and Service

AP Invoices for Demo Aspire

ActivCapture-Invoices Extract Attachments

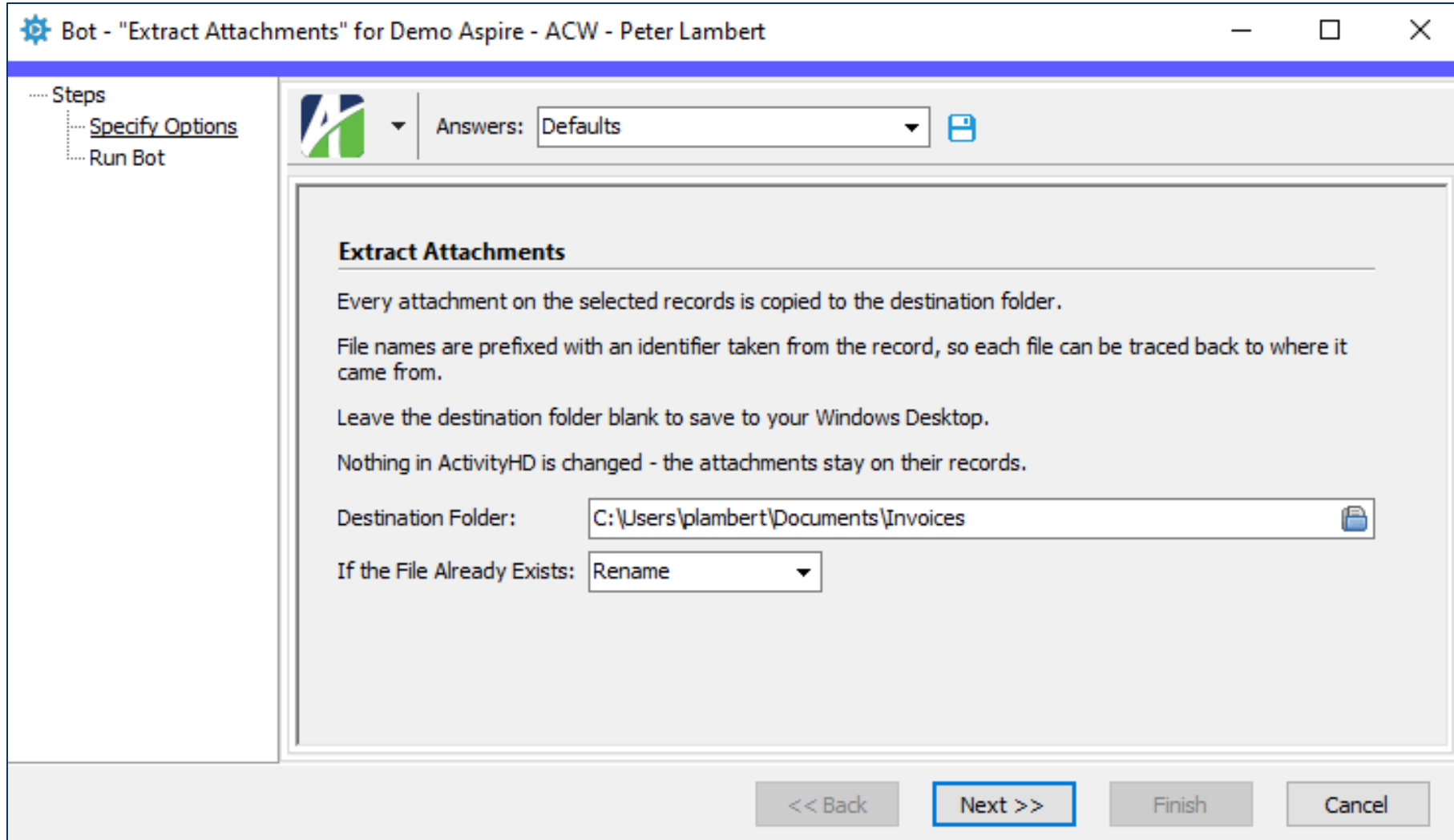
Filters: Lookup:

Batch - #	Status	Merge #	Vendor	Vendor Description	Invoice #	Date	Due Date	Amount	Dept
TM - 34	Hold		CRMBL	Crumble Cookies	INV-77234	6/23/2026	8/22/2026	56.74	Mktg
Test - 16	Hold		Food	Food Giant	INV-58147	6/20/2026	8/19/2026	1,061.58	Test
TM - 55	New		Food	Food Giant	INV-58147	6/20/2026	8/19/2026	1,061.58	Admi
Ramp - 8	New		Conquest	Conquest	DEMO-Conq...	7/15/2026	8/15/2026	1,075.00	Admi
Ramp - 9	New		BakerOff	Baker Office Products	DEMO-Baker...	7/15/2026	8/15/2026	412.55	
Ramp - 10	New		Abiding	Abiding Hope Luthera...	DEMO-ABID...	7/15/2026	8/15/2026	250.00	
TM - 41	Hold		eFavor	eFavorMart.com	INV-63159	6/9/2026	8/8/2026	597.05	Mktg
TM - 36	Hold		Landry	Dallas Landlord test	INV-36617	6/8/2026	8/7/2026	1,794.82	Mktg
Ramp - 4	New		Abiding	Abiding Hope Luthera...	91702	7/6/2026	8/5/2026	277.48	
Test - 13	Hold		Elite	Elite Designs	INV-71697	6/20/2026	8/4/2026	1,442.36	Test
RefundOve...	Paid	1011	CoNetrix	CoNetrix Technology	2345	8/3/2026	8/3/2026	-1,300.00	NoAp
TM - 51	Hold		eFavor	eFavorMart.com	INV-80565	6/19/2026	8/3/2026	405.17	Test
ZLM - 20	Paid	1012	CoNetrix	CoNetrix Technology	678	8/3/2026	8/3/2026	5,000.00	NoAp
Test - 6	Hold		House	Dallas House of Flowers	INV-45508	6/2/2026	8/1/2026	978.45	Test
Test - 5	Hold		CRMBL	Crumble Cookies	INV-52831	6/16/2026	7/31/2026	79.16	Test
Ramp - 5	New		RAMPCC	Ramp Credit Card Exp...	072726	7/27/2026	7/27/2026	4,672.58	
TM - 38	Hold		Disc	Disc Jockeys of Dallas	INV-64409	6/27/2026	7/27/2026	1,694.73	Mktg
ActiveCapt...	Hold		Paint	The Paint Store	TPS-55821	7/14/2026	7/24/2026	425.76	Test
TM - 28	Hold		Choice	Choice Billboards	INV-63316	6/20/2026	7/20/2026	3,559.79	Mktg
ZLM - 17	New		Petal	Petals Plus	12345	7/10/2026	7/20/2026	1,500.00	Mktg
TM - 39	Hold		DJArtist	DJ Artist	INV-71917	6/19/2026	7/19/2026	204.54	Mktg
TM - 52	Hold		Elite	Elite Designs	INV-98583	6/19/2026	7/19/2026	1,203.69	Test
ZLM - 15	New		Petal	Petals Plus	8675	7/9/2026	7/19/2026	1,500.00	Mktg
Test - 10	Hold		DJArtist	DJ Artist	INV-97047	6/18/2026	7/18/2026	1,203.49	Test
Ramp - 6	New		RAMP_Reimb	RAMP Reimbursements	071726	7/17/2026	7/17/2026	287.16	
Test - 12	Hold		eFavor	eFavorMart.com	INV-35530	6/17/2026	7/17/2026	595.55	Test
TM - 37	Hold		DiscLand	Discount Landscaping	INV-75113	6/16/2026	7/16/2026	447.61	Mktg
ActiveCapt...	Hold		Meridian	Meridian Valley Denver	MVD-20760	7/14/2026	7/14/2026	608.77	Test

Total: 1,184 Selected: 14 Amount: 13,112.78 Balance: 9,412.78 Order: Due Date Hint: Save record attachments to a folder on your computer

EXTRACT ATTACHMENTS

Pick a destination folder and how duplicates are handled



The screenshot shows a software window titled "Bot - 'Extract Attachments' for Demo Aspire - ACW - Peter Lambert". On the left, a "Steps" pane lists "Specify Options" and "Run Bot". The main area has a header with a logo, a dropdown menu set to "Answers: Defaults", and a save icon. Below this is a section titled "Extract Attachments" containing explanatory text: "Every attachment on the selected records is copied to the destination folder. File names are prefixed with an identifier taken from the record, so each file can be traced back to where it came from. Leave the destination folder blank to save to your Windows Desktop. Nothing in ActivityHD is changed - the attachments stay on their records." At the bottom of this section, there is a "Destination Folder:" label followed by a text box containing "C:\Users\plambert\Documents\Invoices" and a folder icon. Below that is an "If the File Already Exists:" label followed by a dropdown menu set to "Rename". At the very bottom of the window are four buttons: "<< Back", "Next >>" (highlighted with a blue border), "Finish", and "Cancel".

Bot - "Extract Attachments" for Demo Aspire - ACW - Peter Lambert

Steps

- Specify Options
- Run Bot

Answers: Defaults

Extract Attachments

Every attachment on the selected records is copied to the destination folder.

File names are prefixed with an identifier taken from the record, so each file can be traced back to where it came from.

Leave the destination folder blank to save to your Windows Desktop.

Nothing in ActivityHD is changed - the attachments stay on their records.

Destination Folder: C:\Users\plambert\Documents\Invoices

If the File Already Exists: Rename

<< Back Next >> Finish Cancel

EXTRACT ATTACHMENTS

Every file logged, duplicates renamed, nothing overwritten

Bot - "Extract Attachments" for Demo Aspire - ACW - Peter Lambert

Steps
Specify Options
Run Bot

Progress: The Bot completed for 14 AP Invoices
Status: Process Complete

Item	Message
Initializing	---Created the destination folder: \\Client\C\$\Users\plambert\Documents\Invoices ---Extracting attachments to \\Client\C\$\Users\plambert\Documents\Invoices ---If a file name is already taken: Rename ---
TM - 34	---This bot has no file-name rule for 1099 Transmissions (Accounts Payable), Bank Statemen... ---
Test - 16	---\\Client\C\$\Users\plambert\Documents\Invoices\INV-77234.pdf
TM - 55	---\\Client\C\$\Users\plambert\Documents\Invoices\INV-58147.pdf
TM - 41	---\\Client\C\$\Users\plambert\Documents\Invoices\INV-58147-24764.pdf
TM - 36	---\\Client\C\$\Users\plambert\Documents\Invoices\INV-63159.pdf
Ramp - 4	---\\Client\C\$\Users\plambert\Documents\Invoices\INV-36617.pdf ---\\Client\C\$\Users\plambert\Documents\Invoices\Ramp_Invoice_91702_1.pdf ---\\Client\C\$\Users\plambert\Documents\Invoices\Ramp_Invoice_91702_2.txt
Test - 13	---\\Client\C\$\Users\plambert\Documents\Invoices\INV-71697.pdf
TM - 51	---\\Client\C\$\Users\plambert\Documents\Invoices\INV-80565.pdf
Test - 6	---\\Client\C\$\Users\plambert\Documents\Invoices\INV-45508.pdf
Finalizing	--- ---Finished - 10 attachments extracted from 9 records. ---Destination: \\Client\C\$\Users\plambert\Documents\Invoices ---Bot complete!

- ▶ Select the invoices
- ▶ Each invoice merged by the bot
- ▶ Detail descriptions follow to every line
- ▶ Detail in the GL, the way GP posted it

AP/AR BATCH PROCESSING

AP Invoice - "pay - 437" for Demo Implementation - ACW - Cole Long

New Read Save Report Previous Next Distribution Approve Merge Pay Void Bots Options: Defaults

AP Invoice for Demo Implementation

Batch - #: **pay - 437** Vendor: **FedEx** FedEx Corporation Invoice #: 85472165 Amount: 433.40
Merge #: 1,198 Description: **Freight Bill** Date: 9/16/2026 Balance: 433.40

Invoice
Status: Outstanding ☐ Merge Hold
Owner: ☐ Payment Hold
PO #:
Source: Manual
Payment Location: Main
FedEx Corporation
PO Box 56423
Dallas, TX 75234
USA

Approval
Dept: NoApproval
Status: Submit

GL
AP Account: 2100-00-A
Accounts Payable
GL Date: 9/16/2026
GL Batch: pay437
GL Entry: pay437 - 1
GL Merge #:

Payment Terms
Terms: Net15 Due: 10/1/2026 Basis: 433.40
Discounts: (none)

GL Detail

Line	Source	Account	Account Description	Event	Debit	Credit	Unit	Description	Memo
1	Invoice	2100-00-A	Accounts Payable			433.40	\$		
2		5260-00-A	Freight Exp,Corp		100.00		\$	Corporate Office - New Hire	
3		5260-00-A	Freight Exp,Corp		153.37		\$	Corporate Office	
4		5260-02-A	Freight Exp,Dallas		180.03		\$	Dallas Office	
Unit: \$					Debit: 433.40			Entry Totals...	
9/1/2026 to 9/30/2026 Dollars					Credit: 433.40				

Invoice Extra GL Approval History Custom Payments Notes Asset Costs Attachments Change Logs Other Developer

Edit

AP/AR BATCH PROCESSING

GL Detail									
Line	Source	Account	Account Description	Event	Debit	Credit	Unit	Description	Memo
1 Invoice		2100-00-A	Accounts Payable			433.40	\$		
2		5260-00-A	Freight Exp,Corp		100.00		\$	Corporate Office - New Hire	
3		5260-00-A	Freight Exp,Corp		153.37		\$	Corporate Office	
4		5260-02-A	Freight Exp,Dallas		180.03		\$	Dallas Office	
Unit: \$					Debit:	433.40			
9/1/2026 to 9/30/2026					Credit:	433.40	Entry Totals...		

Journal Entry for Demo Implementation

Batch: pay437 **Entry #:** 1 **Description:** Freight Bill

System-Journal Source: AP-Invoice Activity Source: 2026-09-30 ☐ Closing ☐ Reverse ☐ Hold

Journal Detail												
Line	Source	Account	Account Description	Event	Budget	Date	Reference	Debit	Credit	Unit	Description	Memo
1		2100-00-A	Accounts Payable			9/16/2026	Invoices		433.40	\$		
2		5260-00-A	Freight Exp,Corp			9/16/2026	Invoices	253.37		\$	Corporate Office - New Hire	Corporate Office
3		5260-02-A	Freight Exp,Dallas			9/16/2026	Invoices	180.03		\$	Dallas Office	

Speed, efficiency, fewer errors

REKEYING



Avoids typos and errors

MAPPING



Converts to ActivityHD
accounts and attributes

WAITING



Runs on a schedule, before
anyone logs in

SCHEDULED BOTS

3 AM

3:30 AM

8 AM



The bot runs

Notification email is sent

Records in ActivityHD

SEND W9 FORM: MANUAL VS AUTOMATION

BY HAND

___ minutes each

Look up the
vendor

Find the blank
form

Attach it

Send the email

Write the note

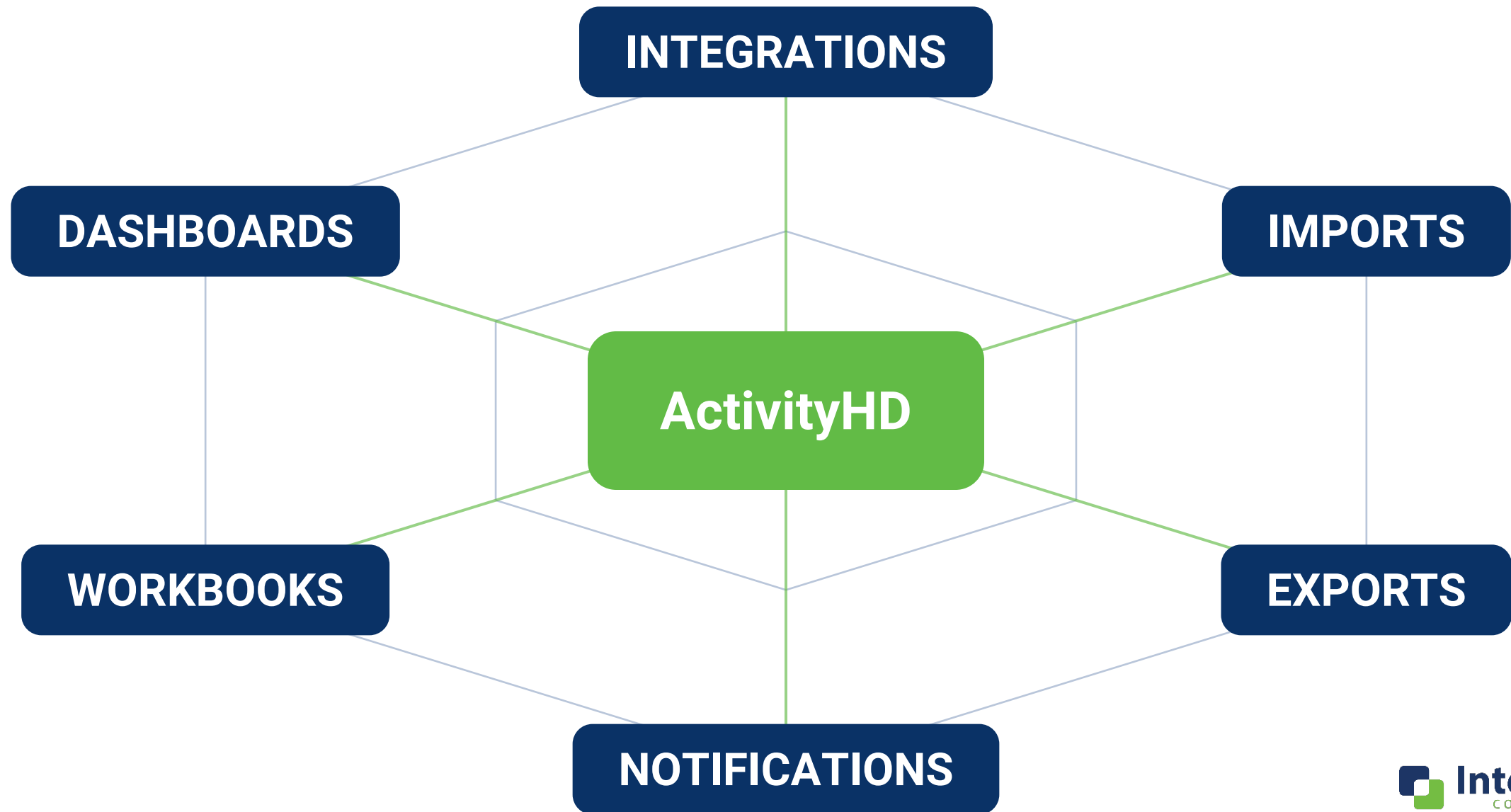
WITH A BOT

One run, all of them

Select the
vendors

Run it

Where we connect



INTEGRATIONS

AP & PAYMENTS

Ramp

CorpayOne

Emburse

Concur

Checkkeeper

TICKETING & ARTS

Tessitura

PatronManager

Etix

PAYROLL & HR

BambooHR

WorkforceHub

RESTAURANTS

Toast

Craftable

Ecotrak

CONSTRUCTION & IT

Procore

ConnectWise

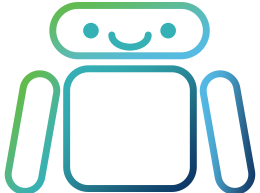
Halo

CRM & SALES

HubSpot

Salesforce

+ the one YOU need



IMPORTS

PAYROLL

ADP

Paychex

Paylocity

Paycom

TIME & UNION

Curtain Time

AEA

AFM / Local 47

IATSE

TRANSACTIONS

Bank Feeds

Credit Card

SOURCE FILE



MAPPING



ACTIVITYHD RECORD

EXPORTS

EXCEL

CSV

PDF

FIXED-WIDTH

JSON

+ any others

The formats you need, customized for you

COPY TO EXCEL

- Copy the HD View
- Manipulate data
- Quick pulls

RUN A REPORT

- Readable format
- Visual design
- Distributable

AUTOMATE IT

- Combine views
- Adjust formats
- Customized data

Records

Reports

ViewReports

DataSources

▶ Emails for scheduled bots

▶ Emails distributing reports

▶ Notes, logs, and banners



Vendor Invoice Sync

Status update for Sample Company

Summary

- Errors: 1
- Updates: 3

Errors

- Invoice 88301 rejected: period 09 is closed for posting

Updates

- Imported 142 vendor invoices
- Merged 138 invoices into AP batch 2026-09
- Attached 142 receipt images to their invoices

This email was automatically generated on 9/16/2026



Add data to
a Workbook



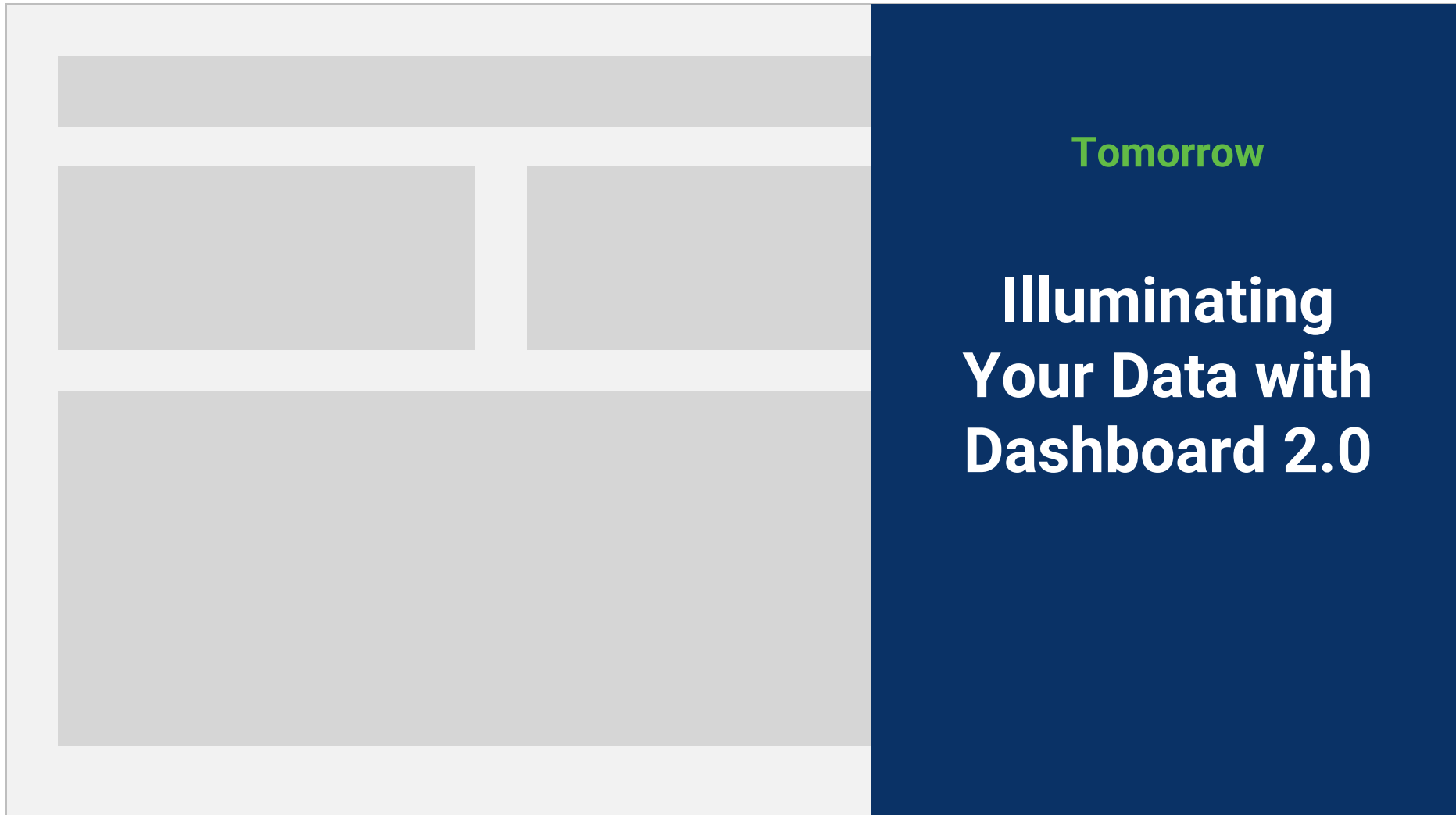
Customize
as needed



Click a
button to
import



See data
posted in
ActivityHD



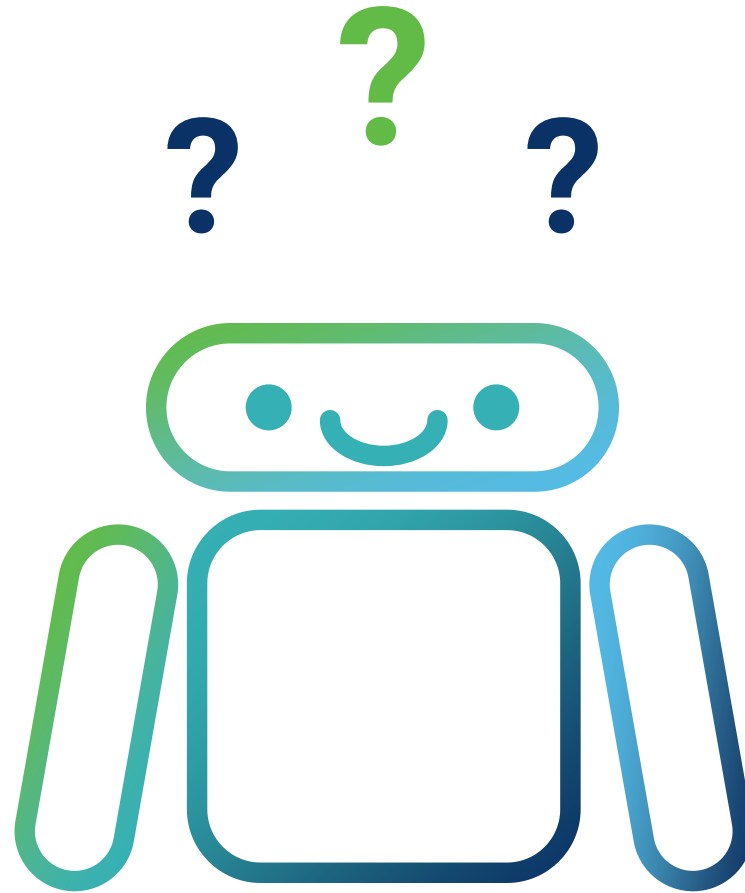
How do you hire one?

sales@accountingware.com

Describe your problem
Ask for a quote
Use your new favorite tool!

For any and every tedious process there
is only one reason a bot isn't out there:

We haven't been asked yet.



**Fill out the
survey to enter
to win prizes!**



TRACK
1

NEXT SESSION:

Troubleshooting Financial Designs

with Sarah Acosta

TRACK
2

NEXT SESSION:

Find It, Filter It, Report It: Getting the Most from AHD

with Zach Montandan & Stefanie Rosales

Thank You!

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