

Complete Controller: Delivering Success with an Innovative Solution From MineralTree

Company Background

Name: Complete Controller

Industry: Software

Accounting System: QuickBooks

Company Size: 51-200

Payment Volume: 7,000 annually

Providing accounting services to small businesses, non-profits, family trusts and households nationwide, Complete Controller is a turnkey solution for CPA firms looking for a Client Accounting Services (CAS) solution. The company leverages technology and skilled accountants to provide financial empowerment through accurate, timely, and cost effective management of business and personal bookkeeping and record keeping tasks.



The Challenge: Exposure to risks & lack of visibility

CEO Jennifer Brazer recalls a time in the not too distant past when, despite having protocols in place, the lack of standardization across bank partners left vulnerabilities in the billpay process. "Complete Controller would integrate with each customer's bank to perform billpay services on their behalf. Each bank had differing capabilities leaving no way to standardize this process." she said.

Inconsistency in the process from one customer's bank account to the next left the door open to unnecessary risks, both for Complete Controller and their customers. Taking no action would leave Complete Controller in a position where becoming a truly scalable solution for their customers would always be mired in risk. Subsequently, this could have devastating effects on the trust and loyalty of those customers which was something Jennifer and her team were not willing to leave to chance.

Several banks could provide direct integration with Quickbooks but others were limited, lacking even the ability to access the billpay module online with a sub-user account. Each scenario presented its own unique challenges, requiring specific protocols customized to each customer and their bank.

Internally the bill approval process consisted of submitting open bills to the customer for written approval to pay. This also created individualized reports and customer preferences.

"Protocols were put in place requiring both written and verbal authentication for payments that exceeded our amount limits, but we had no way to control or enforce those restrictions leaving us exposed to risk if a staff member failed to follow the protocol." describes Jennifer.

The Solution: Enhanced Experience with MineralTree

With the billpay process inconsistent and lacking true controls the need to mitigate fraud risk and provide quality, trustworthy services was critical, and Jennifer and the Complete Controller team knew it.

"We had three driving factors when considering MineralTree", said Jennifer, "Mitigate risk by creating an auditable system for bill pay approvals, introduce innovative technology to our customers, and increase the efficiency of our AP management process."

By white labeling the MineralTree solution the Complete Controller team has eliminated the tedious need for multiple entries, increasing efficiency and reducing risk with enhanced security.

For mid-sized accounting services with multiple accounting teams serving multiple clients using multiple banks, MineralTree just makes sense.

- Jennifer Brazer,
CEO, Complete Controller

With MineralTree, Complete Controller now offers an innovative solution to their customers. One that provides secure, two-factor authenticated transactions for fraud

protection and clear visibility across all of their customers accounts; all while optimizing back office efficiency.

Jennifer added, "For mid-sized accounting services with multiple accounting teams serving multiple clients using multiple banks, MineralTree just makes sense."

In Summary (TLDR)

Complete Controller had an inconsistent billpay process with poor visibility and security.

Implementing MineralTree's solution they were able to:

- **Mitigate risk with two-factor authentication**
- **Increase visibility with near real-time API level connection**
- **Increase efficiency of their AP management process with greater controls & segregation of duties**
- **Offer innovative technology to their customers**



Take the Next Step

For more information about how MineralTree Invoice-to-Pay and SilverPay can help your business streamline the payment process, call us today at (617) 299-3399 or email info@mineraltree.com

