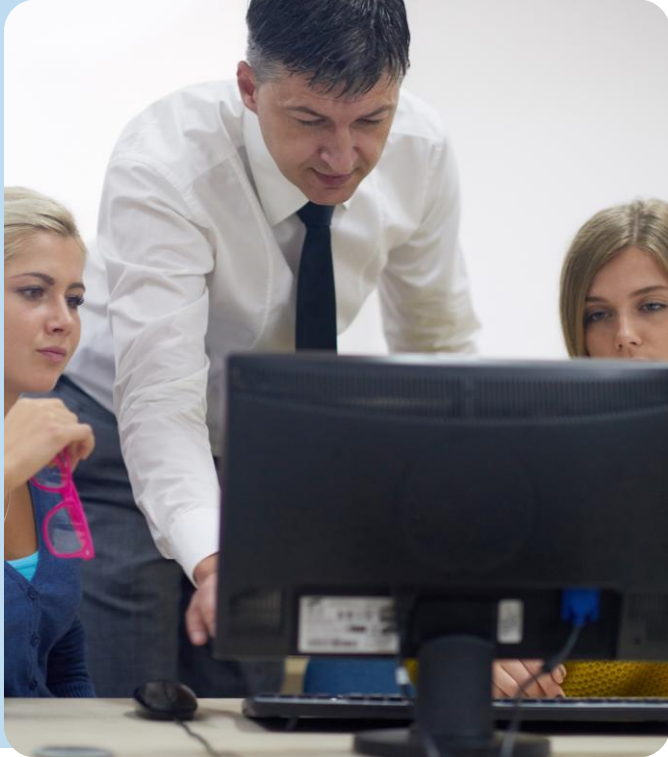


AVIONTÉ CONNECT



Back-Office Operations: Close the Gaps, Power the Growth

- Are your back-office processes fueling growth - or holding it back?
- Learn how to reimagine back-office operations in AviontéBOLD.
- Boost efficiency, cut administrative drag.
- Build a foundation for faster, smarter growth.

Introductions

Welcome to **CONNECT**! Thank you for joining our session.



Becky Fox

LEAD PRODUCT TRAINER

TRAINING



Allison Floeter

SENIOR PROJECT MANAGER

IMPLEMENTATION

The Agenda

- 1 Where Are You Now?
- 2 What's Possible
- 3 Front-to-Back Data Sync
- 4 Invoice Optimization
- 5 Data Accuracy Protocols
- 6 Q&A

Where Are You Now?

Every back-office team has strengths to build on. Let's find yours.



Running Smoothly

Payroll posts on time, invoices go out clean, clients rarely push back.



Room to Grow

Some manual steps you know could be automated. Occasional rework on invoices or rates.



Ready to Transform

Back-office issues are slowing your growth. This session gives you the roadmap.

Wherever you are – this session gives you the next step.

What's Possible

Firms that run optimized back offices in Avionté BOLD see measurable results — fast.

60–80%

Less time on
manual processing

300–500%

ROI in
the first year

15–25%

More available
cash flow

23,000+

Invoices per staff
member annually

TODAY

73% invoice error rate · \$15–26 cost per invoice · 7–17 days to resolve

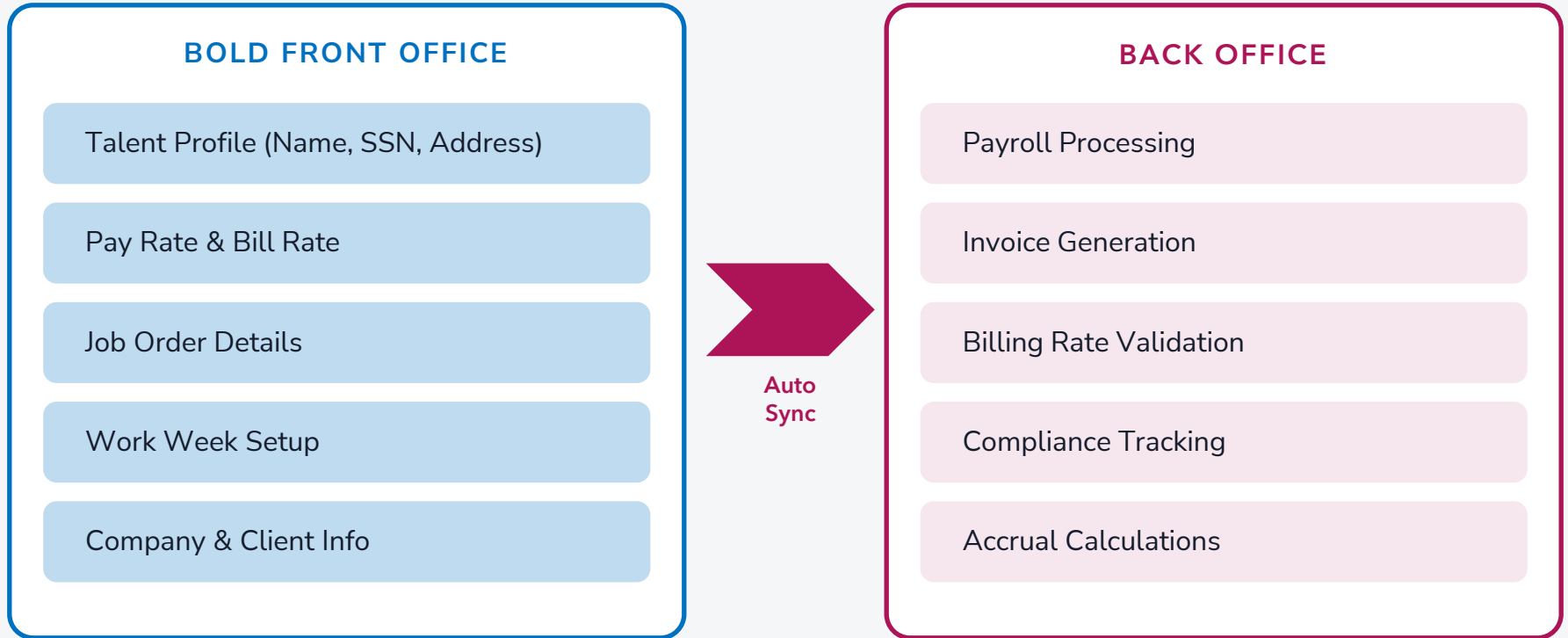
WITH BOLD

Under 5% error rate · \$1–5 cost per invoice · 1–3 days to resolve

Strategy 1: Front-to-Back Data Sync

Clean data in. Clean results out.

Strategy 1: Front-to-Back Data Sync



Strategy 2: Invoice Optimization

Setup that prevents disputes before they start.

Strategy 2: Invoice Optimization

Invoice Style

Avionté Default or custom — match client preference

Auto Email Monthly Statements

Reduces manual follow-up on outstanding balances

Group Invoice By

Job Title, Employee ID, or Week Worked/Employee

Payment Terms

Default Net 10 Days — adjust per client contract

Sort Invoice By

Week Worked or Supervisor

Max Invoice Amount

Useful for clients with per-invoice caps

Separate Invoice By

Controls department consolidation on the invoice

01

Billing Setup

Billing Preferences

Configure your Billing Preferences at a Company or Department level.



Amazon Warehouse

1270 Eagan Industrial Rd Suite 150, Eagan, MN 55121 | 8009001000

Invoice Settings

Control how invoices are structured and formatted.

Invoice to Department *

Corporate



Invoice Style *

Avionte Default Invoice

Separate Invoice By

Assignment ID X

BranchName X

DepartmentName X



Display Items

PO Number X

WeekWorked X

Group Invoice By

Select an option

Sort Invoice By

Select an option

Order: Employee ID X BranchName X PO # X

- ☐ Show Daily Hours
- ☐ Show Time Card
- ☐ Show Web Time Card
- ☐ Show Past Invoice

Order: PO # X DepartmentName X BranchName X

Delivery & Distribution

Manage how invoices are sent and shared.

Email Invoices To

Add Email Address



Emails Added (1): Kevin.Tompkins@avionte.com X

Print Invoice

02

Talent Accruals



zzCarla zzWinters

Only wants part-time work

Talent ID 1234567890 **Work Office ID** 0987654321

Last 4 SSN: 4444

Active Temp

Active

Login Username: zz640199
or Login Email: cjwinters@email.com

Contact Information

Email cjwinters@email.com

Phone +1 651 555-0095

Address

515 Willow Way
Eagan, MN 55123
United States of America
Geo: 240371490, County: DAKOTA,
City: EAGAN

Expressed Email Consent:
Not given

Text Message Consent:
Opt In

Operational Information

Person Debbie Smith
(Avi Staffing-US) Eagan HQ

Start Date Feb 25, 2026
End Date Mar 19, 2026
Rate 0.00

Resume Education Work History Documents Comments Profile Activities Custom Fields Tasks Onboarding Placements References Restrictions History Contribution Deduction **Accrual** Tax Interviews Timesheets

← Back to Accruals List

Sick Leave

Details History Notes

☒ Active

Accrual Plan Sick Leave	Plan Name Sick Leave
Rate Type Per Hour	Max Accrual Balance 48
Rate 0.0334	Pay Period Limit 0
☐ Unlimited Carryover	
Allowed Carryover 48	Yearly Limit 48
Suppression Days 0	Initial Balance 0
Start Date 05/07/2026	End Date mm/dd/yyyy
Yearly Date Type Calendar Date	Yearly Date 07/07/2026
Balance 0	Amount Used YTD 0

Customer Name —

Cancel Save

03

Weekly Process

Avionte | Weekly Process

AVIONTÉ Weekly Process

Start Page Weekly Process

Main Menu

- Assignment
- Agency
- Email
- Back Office
 - Time Entry
 - Payroll
 - Billing
 - Invoice
 - AR
 - Paycheck
 - Weekly Process**
 - Import Export
- Report
 - Reports
- Administration
 - Weekly Process**

Accounting Period

06/28/2026

Accounting Period Summary

Description	Value
Accounting Period	Jun 28 2026 12:00AM
Status	OPEN
Staffing Supplier	Avi Staffing
Warning	4
Created By	avi-trnblld.Sup1
Created Date	Jun 29 2026 9:37AM

Shortcuts

GL

 Close Accounting Period

Accounting Period Status

 Accounting period date: 6/28/2026 12:00:00 AM can not be closed. There are 4 Warnings. Please approve all Warnings.

OK

THREE-POINT VERIFICATION PROTOCOL

Before Payroll

- ✓ Confirm work week is correct
- ✓ Verify hours match approved timesheets
- ✓ Check pay rates against the order

Before Invoicing

- ✓ Confirm bill rates match client contract
- ✓ Verify POs are current
- ✓ Check invoice grouping settings

After Both

- ✓ Run the reconciliation report
- ✓ Investigate any variance found
- ✓ Clear before moving to next cycle

NEW 2026: Talent Accruals now live in BOLD Talent Profile | WC Codes manageable by office in BOLD

Strategy 3: Data Accuracy Protocols

A system that catches errors — not people.

Strategy 3: Data Accuracy Protocols

The four error patterns that cost staffing firms the most — and how BOLD addresses each one.

Incorrect Work Week Assignments

Paying talent for the wrong period causes payroll disputes and compliance risk.

BOLD solution: Work week setup syncs from Front Office automatically.

Time Entry Discrepancies

Mismatched hours between timesheets and invoices delay payment and erode client trust.

BOLD solution: Weekly Process screen flags variances before posting.

Client Rate vs. Pay Rate Mismatches

Unsynchronized pay updates and billing errors eat into margin.

BOLD solution: Rate templates enforce sync between order and invoice.

Outdated Minimum Wage Rates

Every legislation change is a compliance risk if rates aren't updated.

BOLD solution: WC codes and tax settings are centrally managed in BOLD.

What's New in 2026

Two back-office enhancements in BOLD you can put to work today.



NEW 2026

Deductions & Contributions Unified Setup

Configure deductions and contributions in one unified screen inside BOLD — no more switching to Classic. Faster setup, fewer errors, full visibility.



NEW 2026

Talent Accruals in BOLD Profile

View, add, edit, and adjust accruals directly inside the BOLD Talent Profile. No Classic switching required. Live balance display with full audit history.

90-Day Implementation Roadmap

TARGET: Under 5% invoice error rate within 90 days

THIS WEEK

1

Pull last 30 days of invoices.
Count every correction. That
is your baseline.

NEXT 2 WEEKS

2

Map your top three error
types to a root cause. Name
it to fix it.

MONTH ONE

3

Fix the setup. Update invoice
configs, verify rate
templates, confirm sync
rules.

MONTHS 2 THROUGH 6

4

Run the protocol every cycle.
Track error rates weekly.

Measuring Success

Reports to Run — Monday Morning Actions

REPORTS TO RUN

-  **Invoice Error Report**
Track correction rates week over week.
-  **Payroll Invoice with a Gap Report**
Lists paychecks or invoices with time gaps in the sequence.
-  **Accrual History Report**
Verify accuracy per talent — now accessible in BOLD.
-  **Minimum Wage Rate AQ**
Audit minimum wage rates by city, state, and date range.

MONDAY MORNING ACTIONS

-  Pull your last 30-day invoice error count.
-  Review your top client's billing setup — confirm it matches their contract.
-  Assign one person to own the back-office verification checklist.

Partnerships: Extend What You Just Built



The Work Number by Equifax

Use When

Your team spends time manually responding to employment and income verification requests.

Automated employment and income verifications at no cost to Avionté payroll customers. Full tracking of who requested what and when.



SmartFund by Kanmon

Use When

Invoice cycles create cash flow gaps, and you still need to make payroll.

Flexible funding tied directly to invoices already processed in Avionté Back Office. Available through the BOLD Marketplace.



ADP Employment Tax

Use When

Managing multi-state payroll compliance is keeping your team in reactive mode.

Automated tax deposits and filings across every jurisdiction with built-in error detection.

The Puzzle Is Complete

WE STARTED HERE

- Strong client growth
- Effective recruitment
- Excellent market reputation
- Missing: Operational Excellence



WE END HERE

- Strong client growth **AMPLIFIED**
- Effective recruitment **SUPPORTED**
- Excellent reputation **REINFORCED**
- Operational Excellence **ACHIEVED**

73% → <5%
Invoice Error Rate

\$1.2M+
Annual Savings

6 Months
To Complete Transformation

Thank You

Help shape future content by rating this session.

1. Open the Bizzabo app and select Agenda
2. Locate the Session: **Back Office – Close the Gaps**
3. Rate and leave feedback

Rate the session



Leave further feedback...

SEND

Cancel

Questions?

Resources and Next Steps

Page 1 of 2

RESOURCE	DESCRIPTION	LINK
Back Office Billing Setup Guide	Invoice options, finance charges, payment terms configuration	LINK
Accruals in BOLD Talent Profile	How to view, add, edit, and adjust accruals in BOLD Talent Profile	LINK
Weekly Process Overview	Step-by-step payroll and billing weekly process with error-checking checkpoints	LINK
Active Assignments Missing Hours AQ	Three-point pre-payroll, pre-invoice, and post-cycle checklist	LINK

Resources and Next Steps

Page 2 of 2

RESOURCE	DESCRIPTION	LINK
Deductions and Contributions Setup	Guide to the unified Deductions and Contributions setup in BOLD (2026 enhancement)	LINK
ADP Employment Tax Integration	Integration overview, benefits, and setup for multi-state payroll compliance	LINK
SmartFund by Kanmon	Using Avionté SmartFund — flexible funding tied directly to processed invoices	LINK
Equifax Work Number Overview	Automated employment verification integration — setup and client benefits	LINK