

What does eb2b solve for?

Big Y

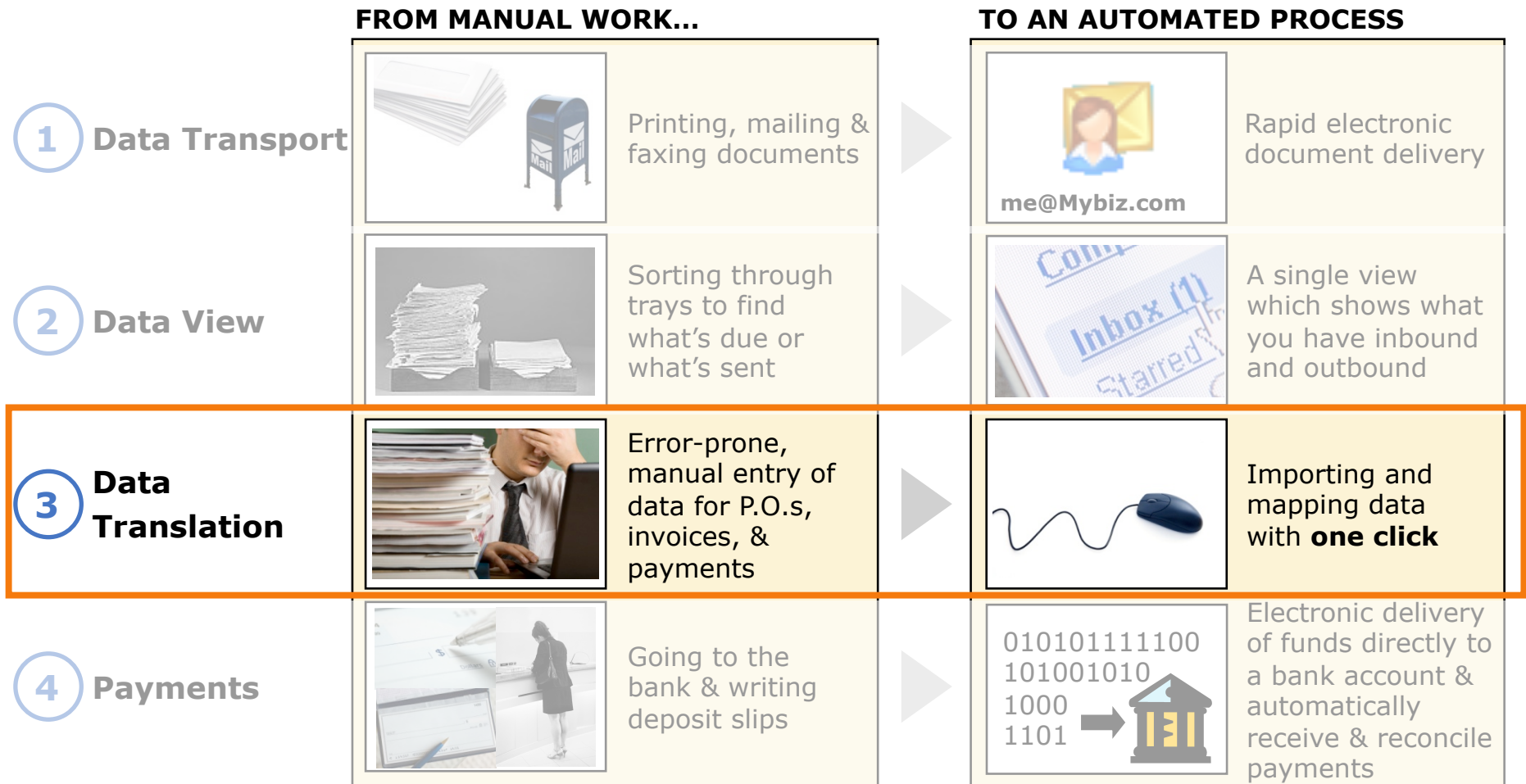
Reduce the **time** customers spend transacting with business partners by creating a delightfully **easy** and **inexpensive** alternative to current solutions.

Key Goals

- Minimize user data entry
- Automated handling of business transactions
- Drive attach to IMS payments and other services

... eventually leading to information exchange via a social network which increases customer productivity and confidence

Where to focus innovation and where to take advantage of existing solutions



Getting from data sent to data in QuickBooks

Data Translation Steps



Description

- Getting data in to be parsed
- Identifying the type of data, which form it is, and who it's from
- Apply right heuristics, rules or templates
- Map data, items, accounts, etc.
- User checks for accuracy and makes any corrections
- Add new rules or templates
- Local memorization + User contribution
- Save the accurate, corrected data into QuickBooks

Example

- Sent data
- Scan
- Browse
- Drag & Drop
- Poll e-mail and pull text/ attached files
- Word document Invoice from Rock Castle Construction
- Total is in the lower right, map the nearest number to "Amount Due"
- Due Date is wrong – user manually maps to upper left corner
- Remember "Due Date" for Word Invoice from Rock Castle is in upper left

User has just imported an invoice

INTUIT. Easy Pay Welcome Carl [Logout](#)

Search for Vendor [Import Invoices](#)

Invoices (3 new) View Pending Invoices

View Approve Reject Select Template Templates Ward, Salmon & Partners - Services Invoice

<input type="checkbox"/>	Date Due	Vendor
<input checked="" type="checkbox"/>	06 / 11 / 1999	Ward, Salmon & Pa...
<input type="checkbox"/>	06 / 30 / 1999	New World Imports
<input type="checkbox"/>	Due on Receipt	B2B Supplies

Mapped Fields

- Vendor Name
- Date
- Amount
- Balance Due
- Item Description
- Tax
- Address

(Red = required fields)

[Ward, Salmon & Partners]
Chartered Accountants
 [20 Queen Street West
 Suite 1400
 Toronto, Ont.
 M5N 2S3]
 Telephone (416) 595-2356 Fax (416) 595-2244 E-mail info@wardsalmon.com

Atlantic Airlines Limited
 107 Pember Road
 Richmond Hill
 Ontario
 L4C 3T6
Attention: Mr. Vince Irving, President

INVOICE

No: [5AAL-2384]
 Date: [May 11, 1999]
 Page: 1 of 1

GST # R13390819A

Professional services rendered for the year ended June 30, 1998 including:

- Preparation of Financial Statements
- Preparation of Federal and Provincial Income Tax Returns
- Advising management on various matters during the year

[Our fee for services rendered]	[\$ 1,150.00]
[GST @ 7.0%]	[80.50]
[Balance Due]	[\$ 1,230.50]

Reviewing tagged data

INTUIT. Easy Pay Welcome Carl [Logout](#)

Invoices (3 new) View Pending Invoices

View ? Approve Reject Select Template Templates Ward, Salmon & Partners - Services Invoice ?

	Date Due	Vendor
<input checked="" type="checkbox"/>	06 / 11 / 1999	Ward, Salmon & Pa...
<input type="checkbox"/>	06 / 30 / 1999	New World Imports
<input type="checkbox"/>	Due on Receipt	B2B Supplies

Mapped Fields

- Vendor Name
- Date
- Amount
- Balance Due
- Item Description
- Tax
- Address

(Red = required fields)

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Attention: Mr. Vince Irving, President

GST # R9036018A

Professional services rendered for the year ended
 June 30, 1998 including:

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[Our fee for services rendered]	[\$	1,150.00]
	[GST @ 7.0%]	[80.50]
	[Balance Due]	[\$ 1,230.50]

Editing tagged data – expanding to include more information

INTUIT. Easy Pay Welcome Carl [Logout](#)

Search for Vendor

Invoices (3 new) View Pending Invoices

View [dropdown] [?] Approve Reject Select Template Templates Ward, Salmon & Partners - Services Invoice [?]

Date Due	Vendor
<input checked="" type="checkbox"/> 06 / 11 / 1999	Ward, Salmon & Pa...
<input type="checkbox"/> 06 / 30 / 1999	New World Imports
<input type="checkbox"/> Due on Receipt	B2B Supplies

Required Fields Mapped

- Vendor Name
- Date
- Amount
- Balance Due
- Item Description
- Tax
- Address

(Red = required fields)

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 [Page:] [1 of 1]

GST # R12390618A

Professional services rendered for the year ended June 30, 1998 including:

- Preparation of Financial Statements
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- Advising management on various matters during the year

Our fee for services rendered	[\$ 1,150.00]
[GST @ 7.0%]	[80.50]
[Balance Due]	[\$ 1,230.50]

Tagged data expanded to include additional information on the form

INTUIT. Easy Pay Welcome Carl [Logout](#)

Invoices (3 new) View Pending Invoices

View Approve Reject Select Template Templates Ward, Salmon & Partners - Services Invoice

	Date Due	Vendor
<input checked="" type="checkbox"/>	06 / 11 / 1999	Ward, Salmon & Pa...
<input type="checkbox"/>	06 / 30 / 1999	New World Imports
<input type="checkbox"/>	Due on Receipt	B2B Supplies

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Page: 1 of 1

GST # R10360618A

Professional services rendered for the year ended June 30, 1998 including:

Preparation of Financial Statements	
Preparation of Federal and Provincial Income Tax Returns	
Advising management on various matters during the year	
Our fee for services rendered	[\$ 1,150.00]
	[GST @ 7.0%] [80.50]
	[Balance Due] [\$ 1,230.50]

▼ Required Fields Mapped

Vendor Name

Date

Amount

Balance Due

Item Description

Tax

Address

(Red = required fields)

Mapping un-tagged data

INTUIT. Easy Pay Welcome Carl [Logout](#)

Search for Vendor

Invoices (3 new) View Pending Invoices

View Approve Reject Select Template Templates Ward, Salmon & Partners - Services Invoice

	Date Due	Vendor
<input checked="" type="checkbox"/>	06 / 11 / 1999	Ward, Salmon & Pa...
<input type="checkbox"/>	06 / 30 / 1999	New World Imports
<input type="checkbox"/>	Due on Receipt	B2B Supplies

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 [Date:] [May 11, 1999]
 [Page:] [1 of 1]

GST # RY0390618A

Professional services rendered for the year ended
 May 31, 1999 including:

- Memo Preparation of Financial Statements
- Preparation of Federal and Provincial Income Tax Returns
- Advising management on various matters during the year

Our fee for services rendered]	[\$ 1,150.00]
[GST @ 7.0%]	[80.50]
[Balance Due]	[\$ 1,230.50]

Required Fields Mapped

- Vendor Name
- Date
- Amount
- Balance Due
- Item Description
- Tax
- Address

(Red = required fields)

Previously un-tagged data is now tagged

INTUIT. Easy Pay Welcome Carl [Logout](#)

Invoices (3 new) View Pending Invoices

View Approve Reject Select Template Templates Ward, Salmon & Partners - Services Invoice

	Date Due	Vendor
<input checked="" type="checkbox"/>	06 / 11 / 1999	Ward, Salmon & Pa...
<input type="checkbox"/>	06 / 30 / 1999	New World Imports
<input type="checkbox"/>	Due on Receipt	B2B Supplies

Required Fields Mapped

- Vendor Name
- Date
- Amount
- Balance Due
- Item Description
- Tax
- Address
- Memo

(Red = required fields)

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 [Date:] [May 11, 1999]
 [Page:] [1 of 1]

GST # R12390619A

Professional services rendered for the year ended June 30, 1998 including:

[Preparation of Financial Statements Memo

Preparation of Federal and Provincial Income Tax Returns

Advising management on various matters during the year

Our fee for services rendered] [\$ 1,150.00]

[GST @ 7.0%] [80.50]

[Balance Due] [\$ 1,230.50]

Bill is entered and ready to be paid

INTUIT. Easy Pay Welcome Carl Logout

Search for Vendor Select Payment Method (3 Pending Invoices for review) Import Invoices

Bills (3 new) View Pending Cleared Due on or before A/P 20001 'Accounts Payab

Pay From <select account> Balance Pay Amt. Due 1230.50 Amt. to Pay 1230.50 3 of 10 >> view all

<input type="checkbox"/>	Date Due	Vendor	Currency	Ref. No.	Disc. Date	Amount Due	Disc. Used	Amount to Pay
<input checked="" type="checkbox"/>	06 / 11 / 1999	Ward, Salmon & Partn...	USD			1230.50	0.0	1230.50
<input type="checkbox"/>								
<input type="checkbox"/>								

QuickBooks Bill Select Template

[\(view original\)](#) Vendor Terms Number of Credits
 Address Suggested Discount Total Credits Available
 Date
 Discount Date
 Memo Professional services rendered for the year ended June 30, 1998

Expenses	\$0.00	Items	\$1,250.00					
Item	Description	Qty	U/M	Cost	Amount	Customer:Job	Bila...	Class
Subs:Painting	Painting	10		25.00	250.00	Ecker Designs:Office Expansion	<input type="checkbox"/>	New Construction
Subs:Insulating	Install insulation	20		25.00	500.00	Ecker Designs:Office Expansion	<input type="checkbox"/>	New Construction
Subs:Drywall	Install drywall	5		25.00	125.00	Ecker Designs:Office Expansion	<input type="checkbox"/>	New Construction
Subs:Plumbing	Plumbing	15		25.00	375.00	Ecker Designs:Office Expansion	<input type="checkbox"/>	New Construction

Select PO Receive All Show PO Time

Paying the Bill

The screenshot shows the Intuit Easy Pay interface. At the top, it says "INTUIT. Easy Pay" and "Welcome Carl Logout". Below that is a search bar for vendors and a "Select Payment Method" button. A notification says "(3 Pending Invoices for review)" and there is an "Import Invoices" button. The main section is titled "Bills (3 new)" and shows a table of bills. The first bill is due on 06/11/1999 for 1230.50 from Ward, Salmon & Partn... The "Set Up Payment Method" dialog box is open, showing options for Turbo Pay (recommended), Credit Card, Wire Transfer, and Print Check. The Turbo Pay option is selected, and fields for Date, Amount, Account, Routing number, and Account number are visible. The "Submit Payment" and "Cancel" buttons are at the bottom of the dialog.

Date Due	Vendor	Currency	Ref. No.	Disc. Date	Amount Due	Disc. Used	Amount to Pay
06 / 11 / 1999	Ward, Salmon & Partn...	USD			1230.50	0.0	1230.50

Set Up Payment Method

Date Amount Account

Ending Balance

Turbo Pay (recommended) ←

Routing number

Account number

Credit Card

Wire Transfer

Print Check

An ACH Network of Payors and Payees

- Free accounts for all Intuit users
- Low transaction fees (Free- 50c/txn.)