rev.io

WELCOME
TO **CLIENT SUMMIT**

PATRICK ELLIOTT
VP OF MARKETING

THANK YOU TO OUR SPONSORS

DIAMOND

Wolters Kluwer

PLATINUM

AT&T Partner Exchange®

crexendo® Powered by NetSapiens

trx SERVICES

SILVER

amop®

CERETAX

EISNERAMPER

nuvei

taxconnex®

the business growers

Inteserra A JSI Company

TransNexus®

CHARITY

INTOWN CARES

INTOWN CARES MISSION:
Prevents and reverses homelessness and hunger in Intown Atlanta.

REV.IO LEADERSHIP SPEAKERS

BRENT MAROPIS
CEO

EVAN RICE
PRESIDENT & COO

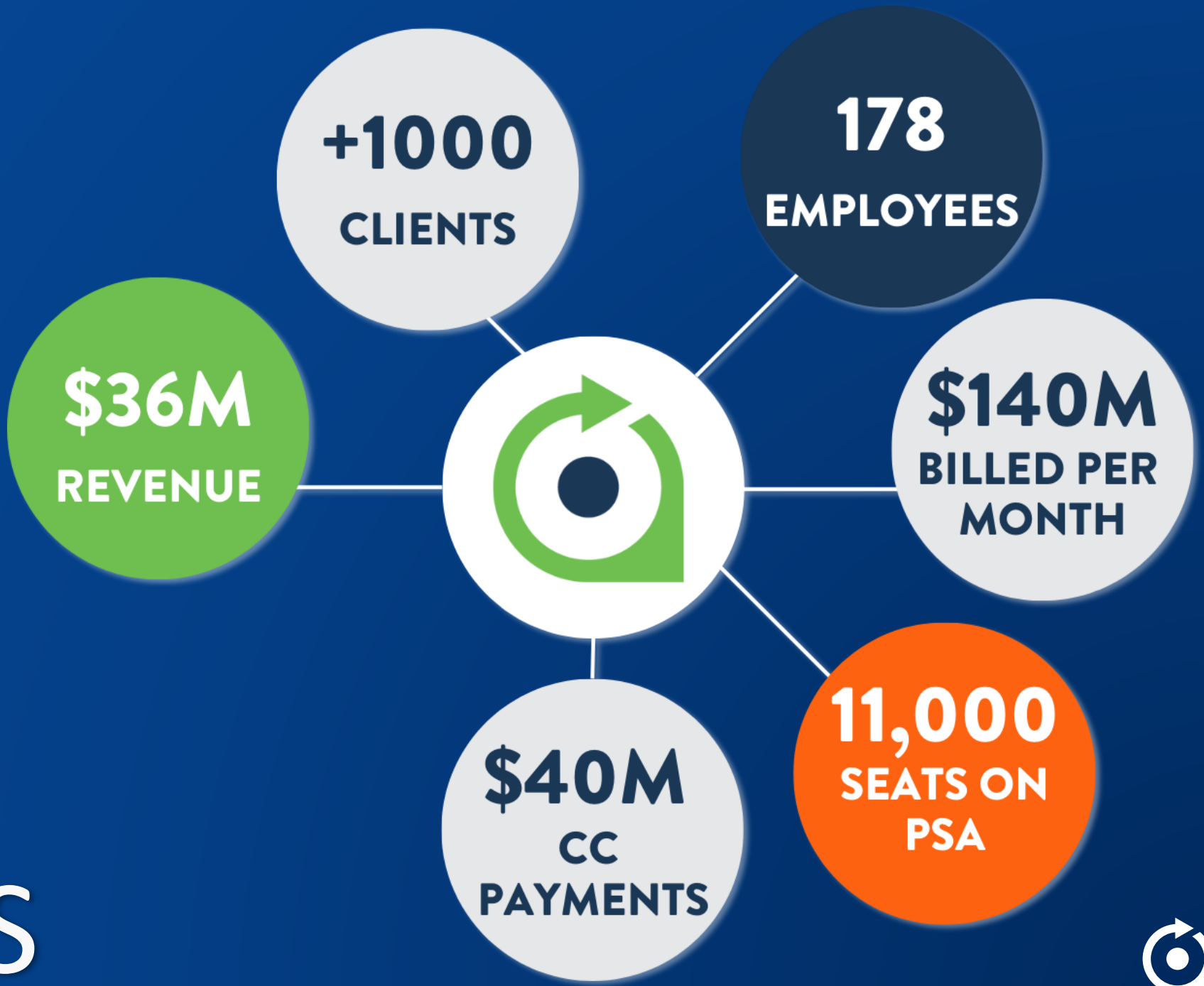
JASON OGLESBY
CTO

SARA BROWN
VP OF PRODUCT

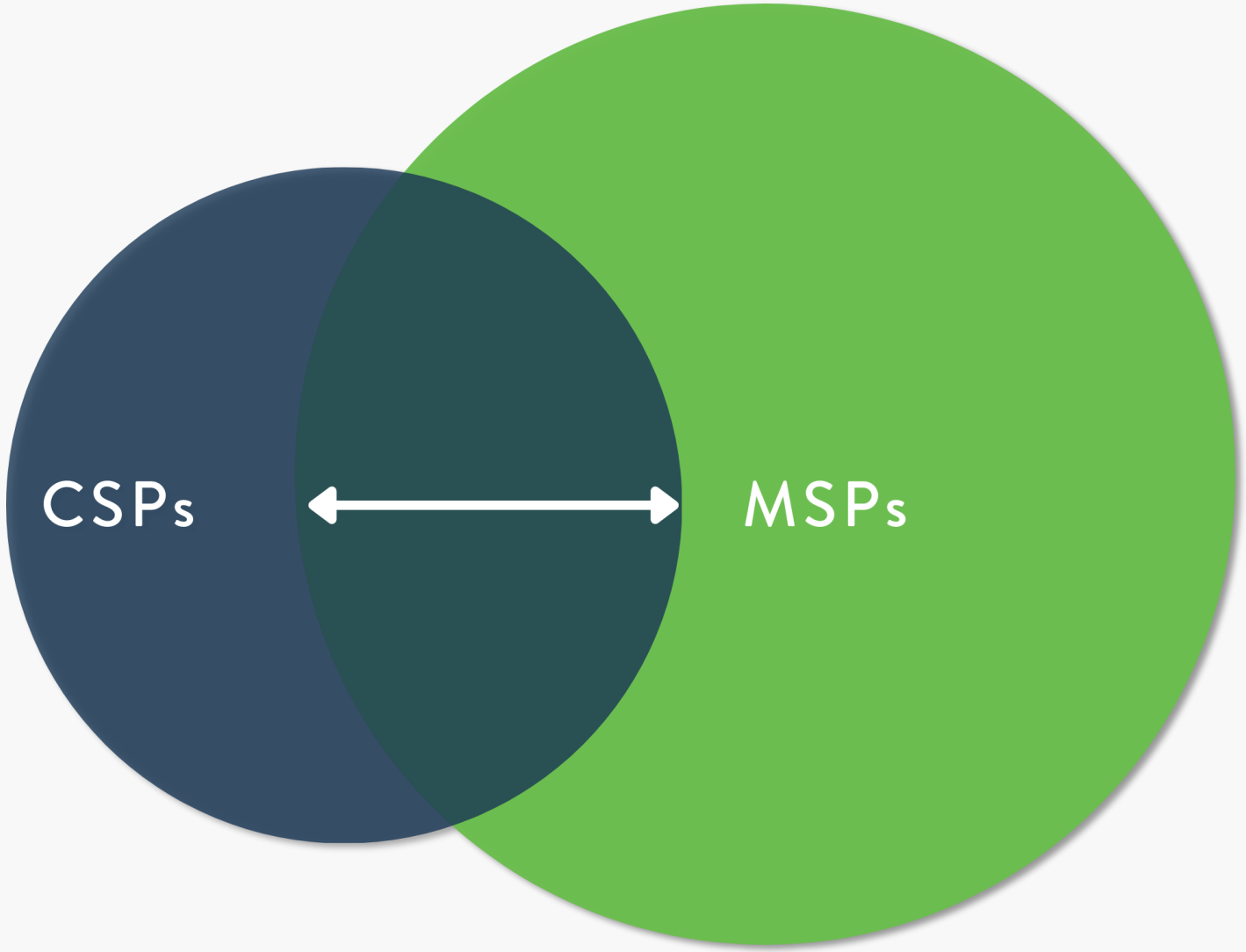
BRENT MAROPIS
CEO

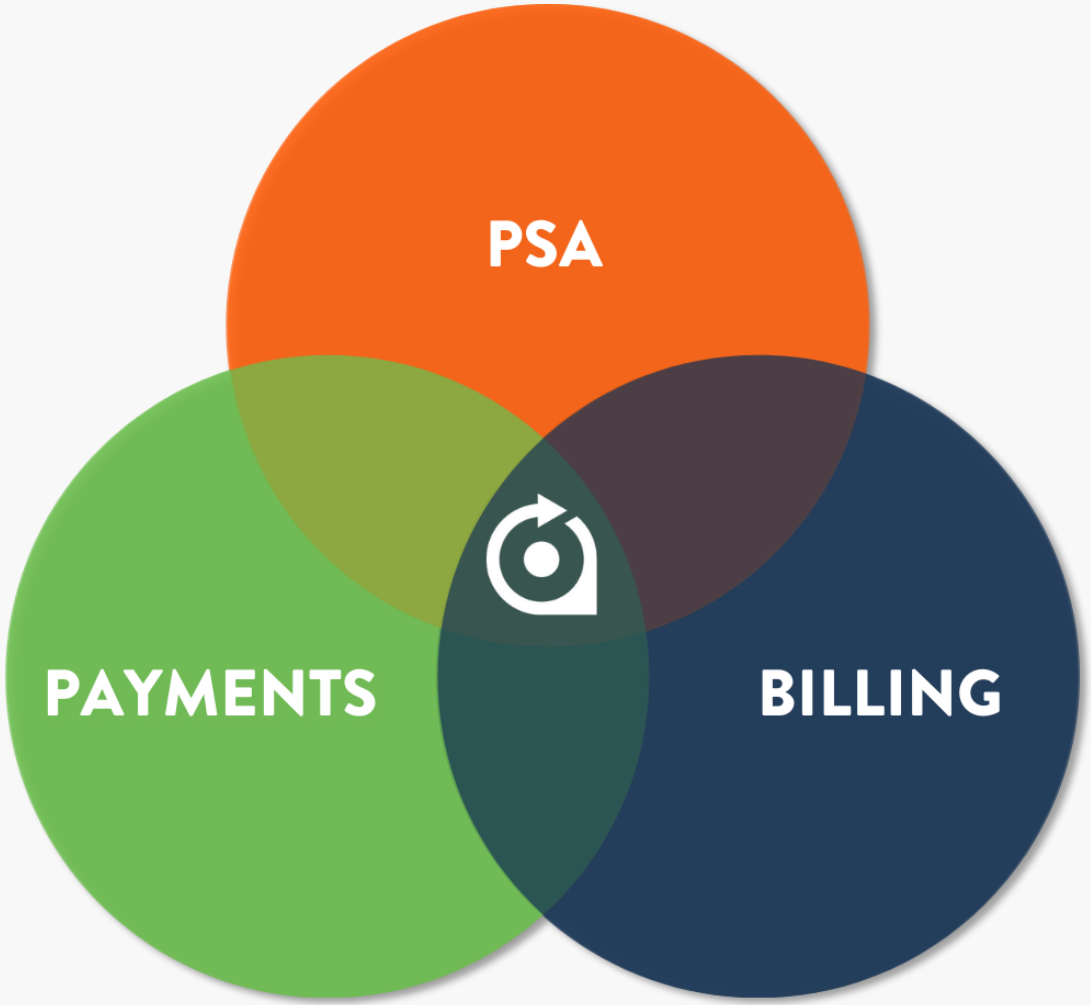
rev.io

BY THE NUMBERS

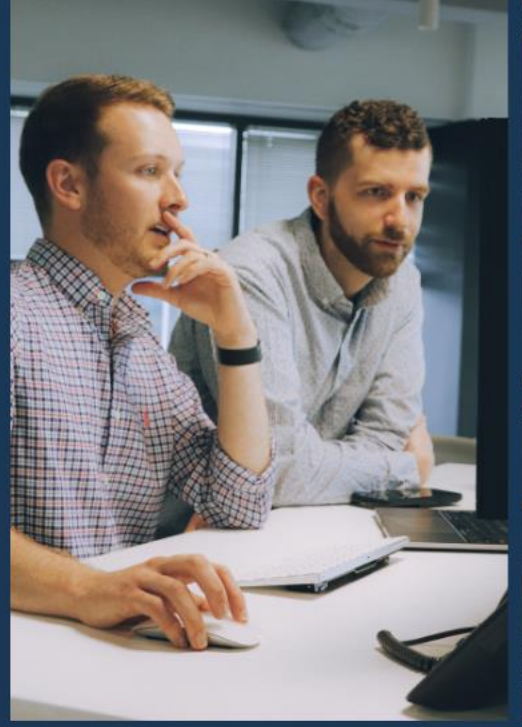


TELECOMMUNICATIONS + MANAGED SERVICES ARE BLENDING





ONE PLATFORM FOR ALL

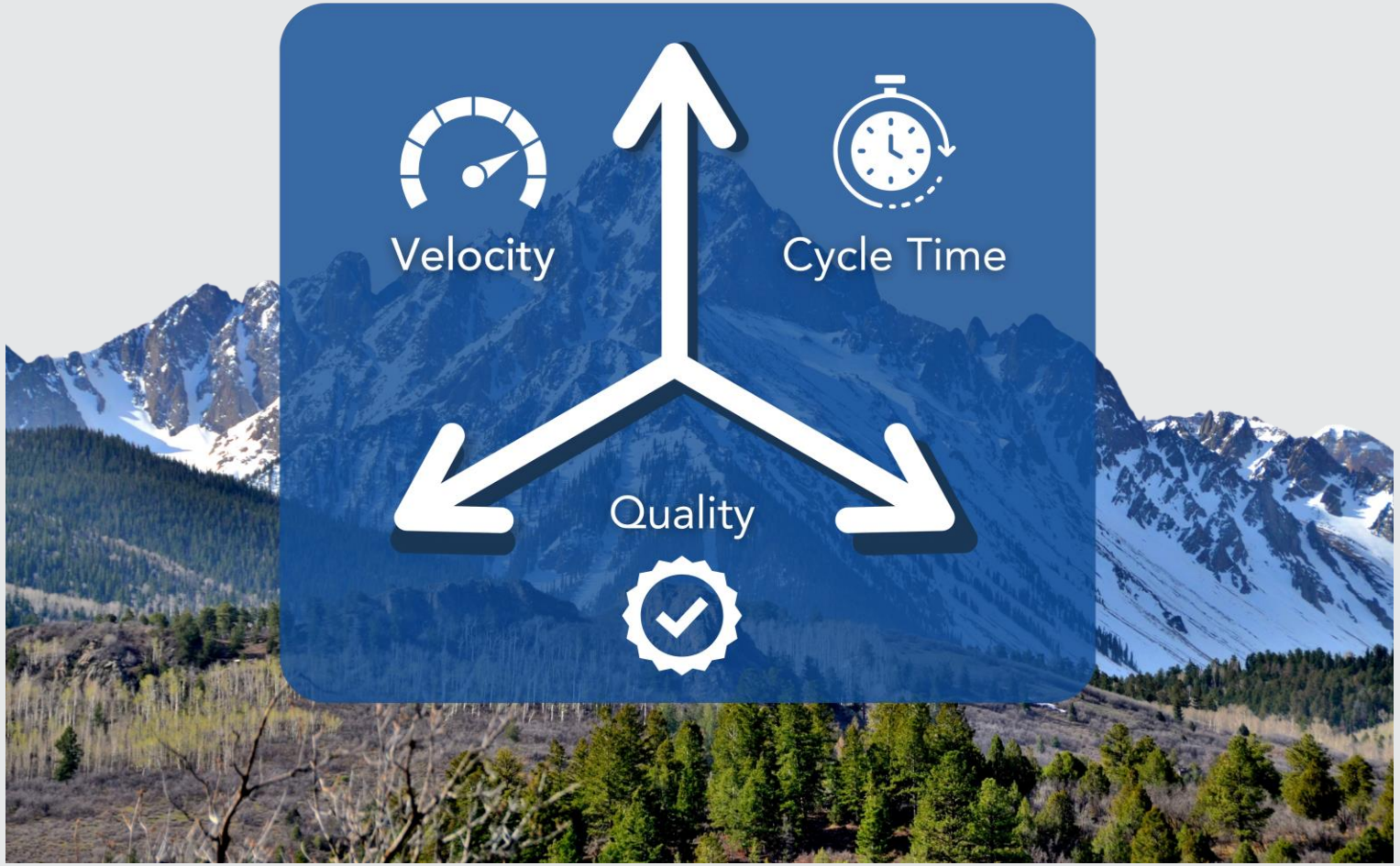


2024 THEME
RELENTLESS

rev.io
BILLING
ACCOUNT MANAGEMENT
BUSINESS AUTOMATION
ANALYTICS

JASON OGLESBY
CTO

PRIORITIES FOR DEVELOPMENT



ELEVATE

SARA BROWN
VP OF PRODUCT

YEAR IN REVIEW

Tigerpaw®

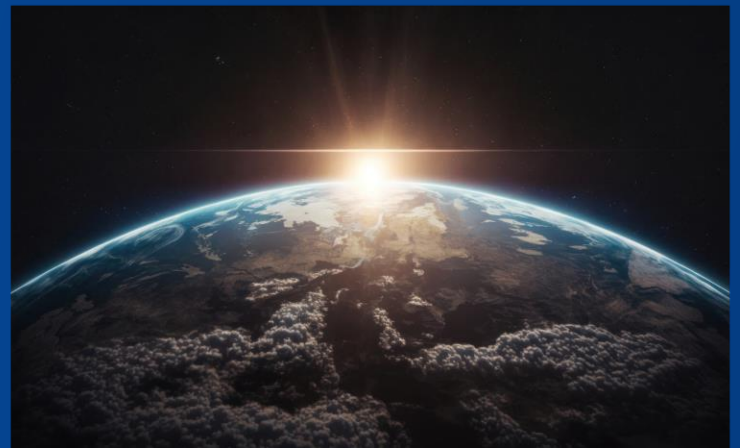
rev.io PSA

Quote to Contract + Quote to Agreement

PSA-to-Billing Integration

Field Service App

REV.IO ROADMAP



rev.io BILLING

- Payments
- International
- Package Based Quantities

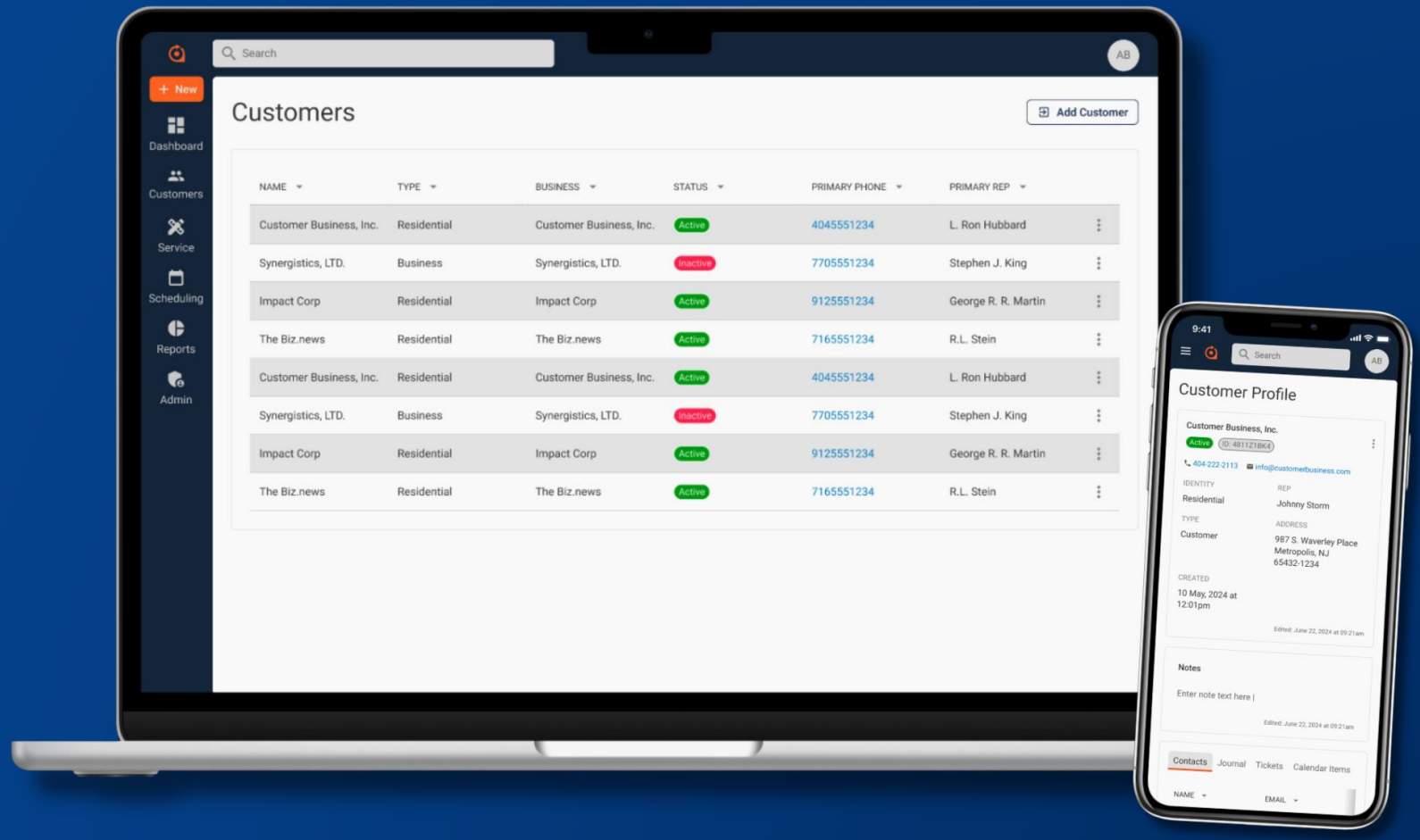
rev.io ODIN

webex by cisco

rev.io
PSA
LATER
NEXT
NOW

COMING UP THIS MORNING

YOUR FIRST LOOK AT REV.IO PSA ON THE WEB!



EVAN RICE
PRESIDENT & COO

DIAMOND KEYNOTE

Wolters Kluwer

PLATNIUM KEYNOTES

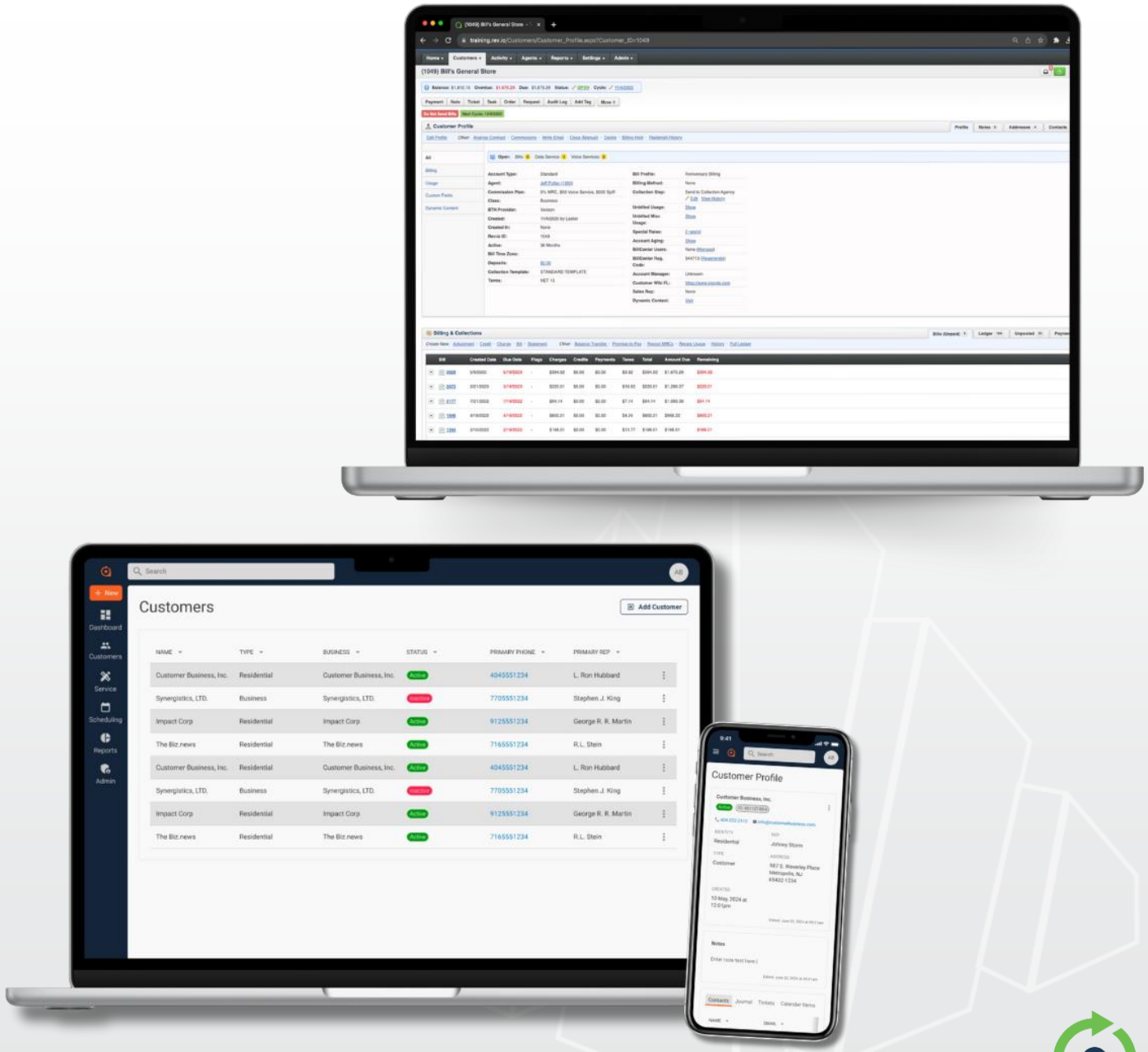
AT&T Partner Exchange®

crexendo® Powered by NetSapiens®

trx SERVICES

SPONSOR FAST PITCHES

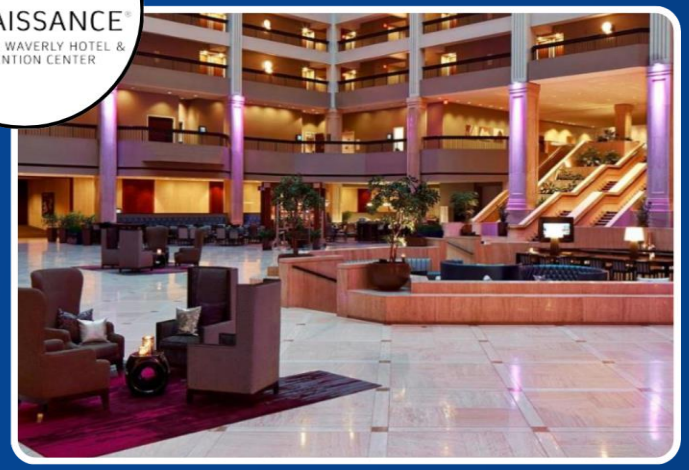
TAILORED SYSTEM **LEARNING**



INDUSTRY EXPERT PRESPECTIVES

HEAR FROM REV.IO EXPERTS AND OUR PARTNERS

TONIGHT'S NETWORKING EVENTS



Partners in your success: the power of precision in protecting your business

Chris Kane
Head of Sales
CCH Tagetik, Indirect Tax

Wolters Kluwer

Speaker

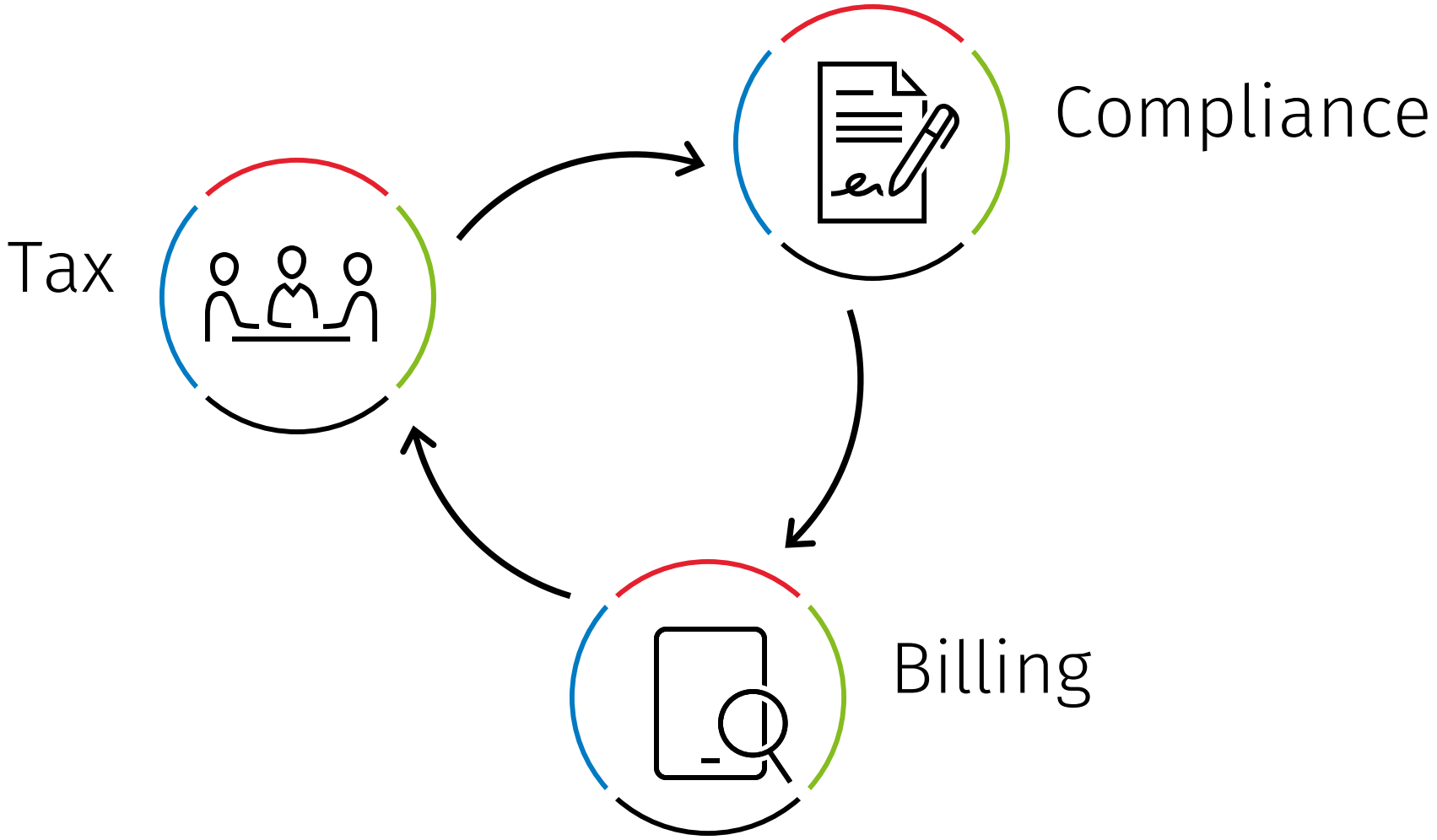
Chris Kane

Chris Kane is a sales leadership expert with 25 years of experience in large multinational organizations. He currently leads the Sales and Use Tax sales team and consults with clients in making better-informed decisions in tax management and compliance processes. Chris has extensive experience in ERP integration, eCommerce integration, channel sales development, and business intelligence consulting. Prior to joining Wolters Kluwer, Chris spent 16 years with IBM.

Chris Kane

Head of Sales – Corporate Tax
CCH® Tagetik, Indirect Tax

Strong partnerships enhance customer experiences



Rev.io Wolters Kluwer Partnership

- 100+ Common clients
- 13+ Years of partnership
- A robust, state-of-the-art solution with seamless integrations
- Effortless onboarding process for clients

rev.io

Wolters Kluwer

Wolters Kluwer

When you have to be right

Telecom tax solution
CCH® SureTax®

Telecom tax expertise
Where tradition of CCH® meets innovation of CCH® Tagetik

103
years

Since the first sales tax reforms were **enacted in the USA in 1921**

18+
years

Rates and rules database **trusted by IRS**

Serving customers in

180+

countries. Operations in 40+ countries

Approximately

20,000+

employees worldwide

$5.9

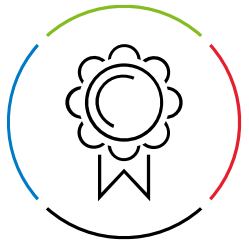
billion in revenue

Values

How we behave

Focus on customer success

Customers are at the center of everything we do



Make it better

We're committed to continuous improvement and innovation

Aim high and deliver

We're responsible for the right results

Win as a team

We're stronger together

Solving the biggest telecom tax problems with expertise

Expertise:

- 35 + full time tax attorneys and CPAs dedicated to researching and updating tax rates
- In-house research team
- Expert implementation and consulting services
- U.S.-based support team
- Globally recognized as the leading source for telecom taxation

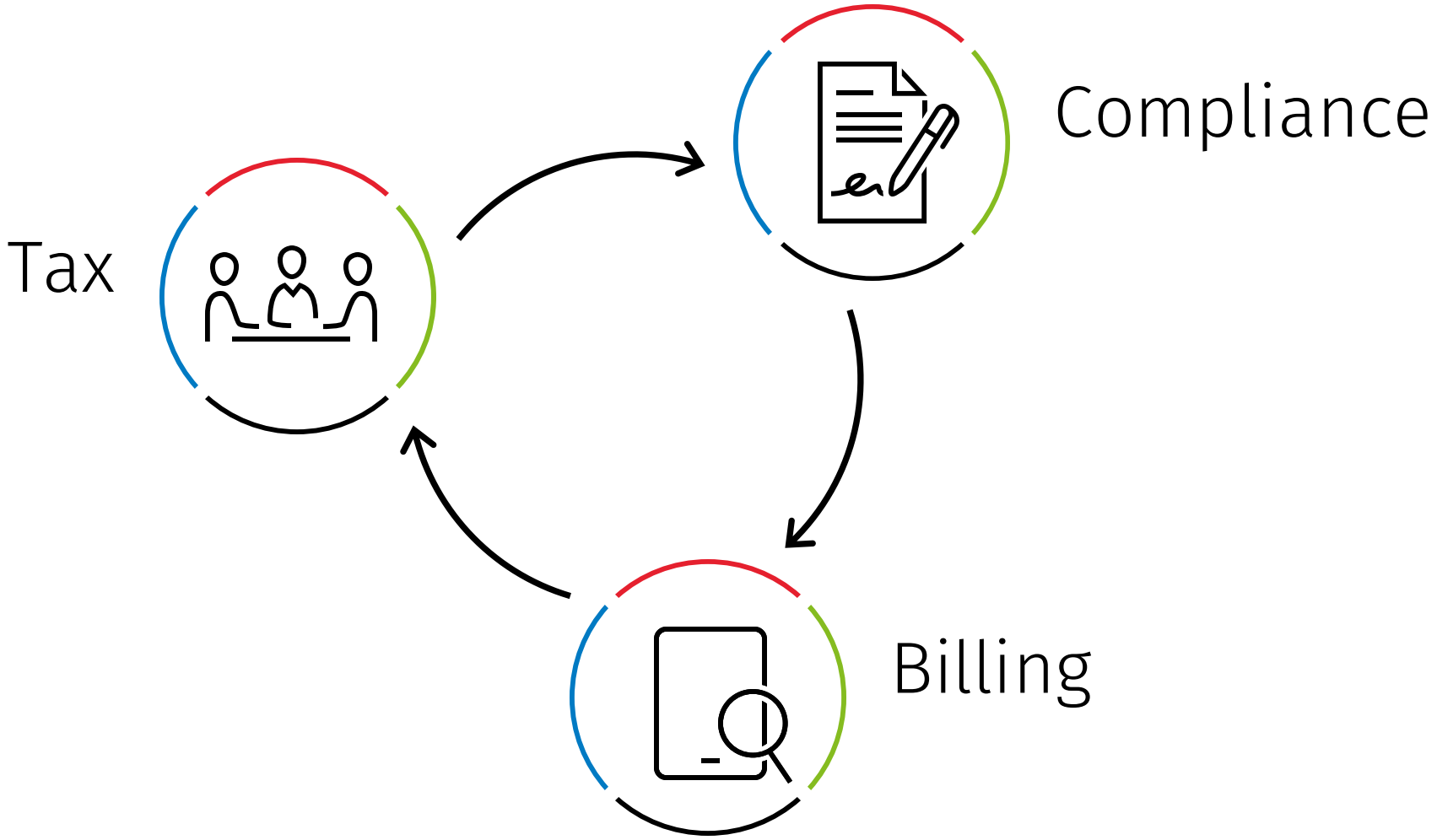
Technology:

- CCH® SureTax® has been integrated with Rev.io since 2016
- Hosted on Microsoft Azure
- API and batch processing options
- Flexible parent/child hierarchy and bundling
- Robust platform supporting everyone from Tier 1 to small telecom providers

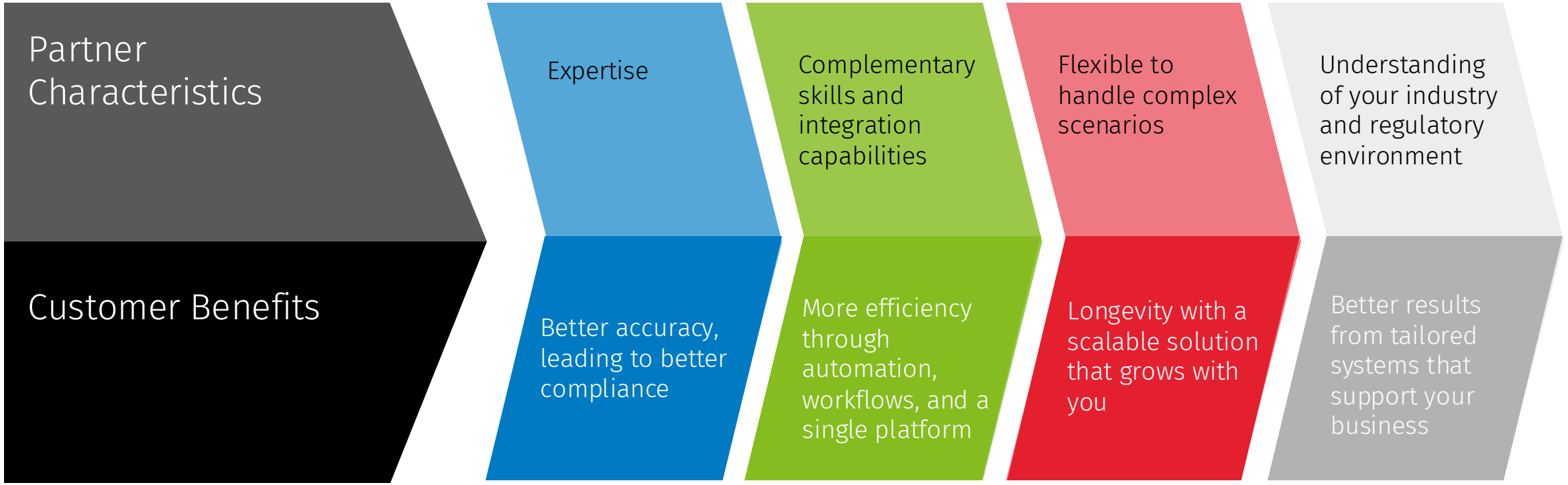
Partnerships:

- Rev.io
- Compliance partnerships

Strong partnerships enhance customer experiences



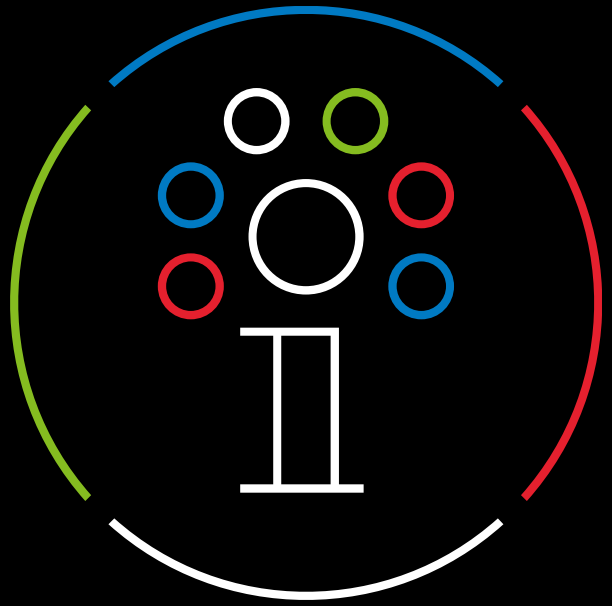
A competitive advantage with the right partners



Strong partnerships are kind of like a s’more

Strong partnerships enhance customer experiences

What percent of businesses claim that tax rate or rule errors are the reason for penalties?



Answer

48%

Of businesses claim tax rate or rule errors are the #1 reason for penalties

TAKEAWAY:
Ensure calculation accuracy

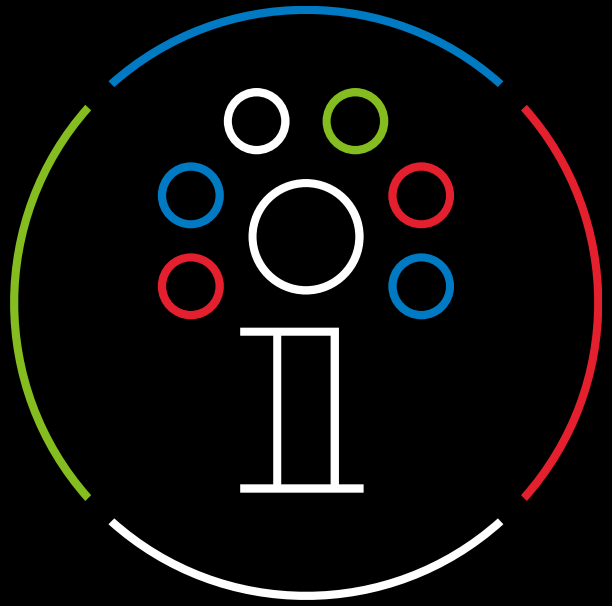
* Source: Aberdeen Group, 2016 | Percentage of Respondents | n=261

An example: it's not just about technology

Tax Type	Lifeline Exemption	Residential Customer
	Tax Cost	Tax Cost
CA Emergency 911 Surcharge	$0.00	$0.30
CA PUC Fee	$0.36	$0.45
CA Public Purpose Program Fee	$0.00	$1.11
CA State 988 Fee	$0.00	$0.08
	$0.36	**$1.94**
		$1.58

* Tax line charges that are different between Lifeline and Residential

True or false…



Most of a bundled VoIP service is not applicable to FUSF tax.

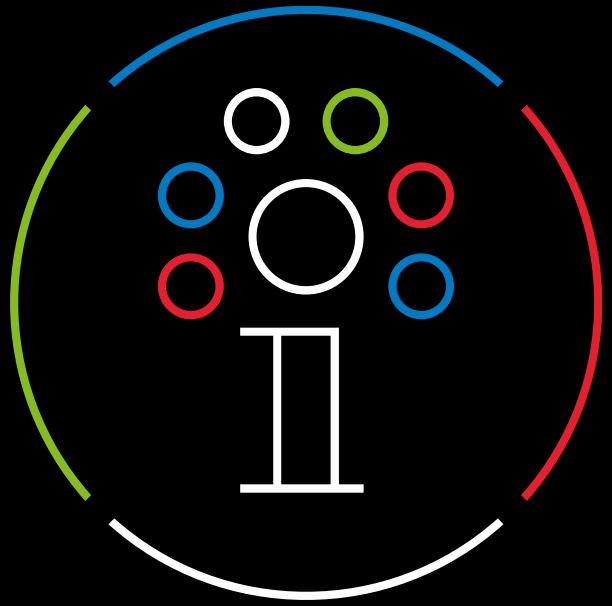
Better strategies powered by technology

- Example: VoIP product for $19.00
  - Bundled, you're paying ~$6.00 in FUSF taxes
  - Unbundled, you're paying ~$2.50
  - Certain components of that bundle aren't subject to FUSF
  - Most of the bundle likely to not be assessable

Wolters Kluwer

rev.io

True or false…



AI will replace tax auditors.

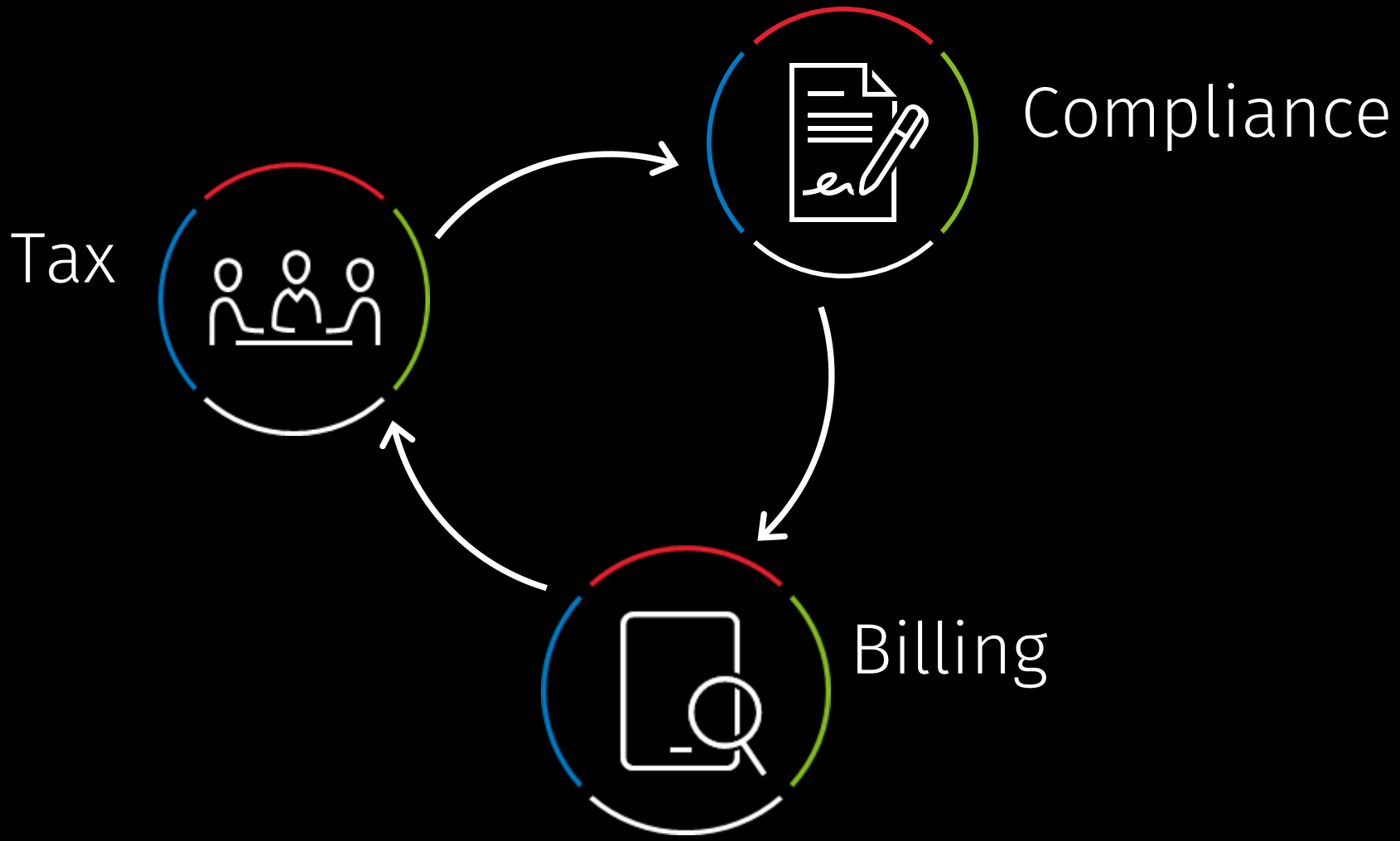
New sheriff in town – the AI Auditor

- Even the most basic of AI tools can be used to track down delinquent taxpayers
  - You have "tele" in your company name
  - You're filing sales tax
  - Are you filing Excise tax?
- Bottom line: pay now or pay later

Wolters Kluwer

rev.io

Strong partnerships enhance customer experiences



Talk to us TODAY!

Join our breakout session:

Telecom tax complications or questions? Get expert answers at our roundtable!

Tuesday, September 10th
2:45 – 3:30 PM
Wilton Conference Room

Stop by booth #10 to discuss your sales tax needs!

Visit our website:
CCH® SureTax® for Communications Tax

BREAK AND SPONSOR HALL

CLIENT SUMMIT

rev.io

SPONSOR
FAST PITCHES

the business growers

KNOW • GROW • SCALE

CERETAX

TransNexus®

taxconnex®

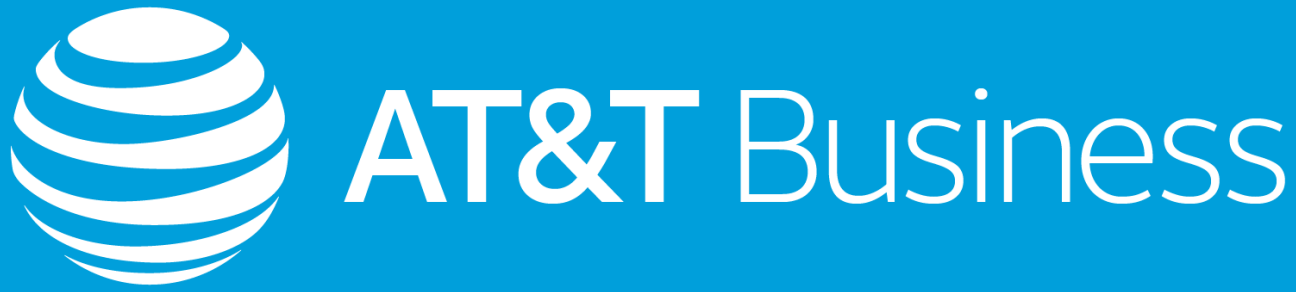
now it's all on us

amop®

Inteserra

A JSI Company

nuvei


AT&T Business

Owning the customer & building equity value!

Jeff Zimmerman aka JZ

Business Development Manager
AT&T Partner Solutions

Channel first culture

AT&T Partner Exchange is a **first-of-its-kind** reseller program that puts you, the solution provider, in the driver's seat.

700+ Solution Providers in our program

100+ awards for innovation & leadership

Channel-focused sales and support

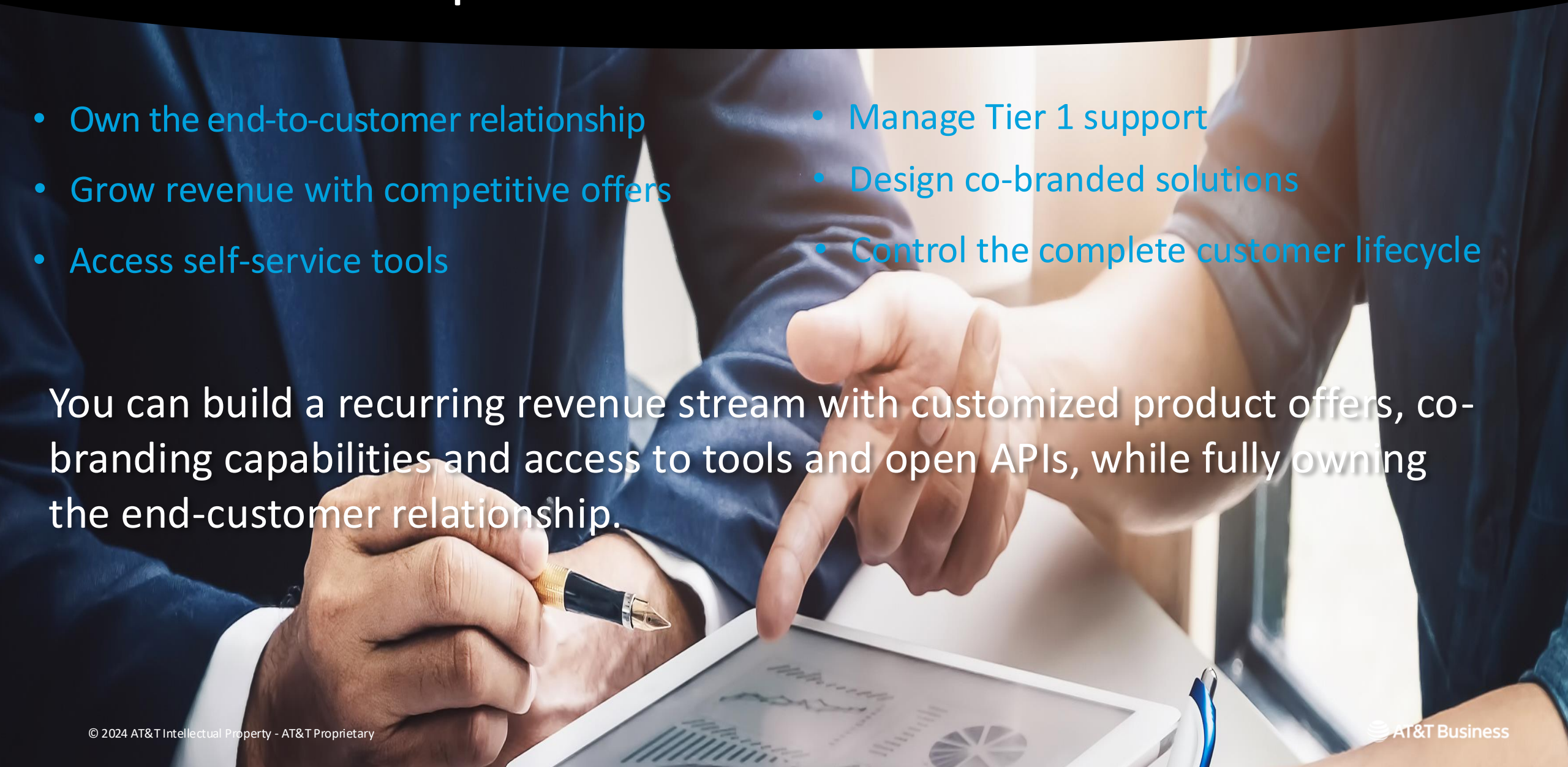
Strategic mobility & network solutions

Innovative tools & APIs to simplify workflows

Reseller-specific training programs

© 2024 AT&T Intellectual Property - AT&T Proprietary

You own the experience



- Own the end-to-customer relationship
- Grow revenue with competitive offers
- Access self-service tools
- Manage Tier 1 support
- Design co-branded solutions
- Control the complete customer lifecycle

You can build a recurring revenue stream with customized product offers, co-branding capabilities and access to tools and open APIs, while fully owning the end-customer relationship.

© 2024 AT&T Intellectual Property - AT&T Proprietary

Strategic Solutions

Tap into a robust product portfolio, layer in your value-added services and deliver tailored solutions to your customers, all powered by a network designed for the future.

IoT & Mobility

- Wireless Wide Area Network:
  - Internet Air
  - Fixed Wireless
  - Broadband on Wireless
- Smartphones & Tablets
- International Options
- IoT Professional Services

Ethernet

- Switched Ethernet
- Switched Ethernet on Demand
- Dedicated Point-to-Point Ethernet
- Dedicated Ethernet
- Ethernet Private Line – WAN

Internet & Network

- Managed Internet Services
- Internet Access
- Virtual Private Network
- Dynamic Defense

Voice & Collaboration

- IP Flexible Reach

© 2024 AT&T Intellectual Property - AT&T Proprietary

Enablement & Support

Flex your marketing muscle with easy-to-use, scalable tools, marketing funds, and training designed to drive sales results.

24x7 Portal Access

- Marketing resources
- Rate cards
- Fiber lists
- Quote and order
- Support Center

Development Funds

- Marketing
- Billing and Tax Compliance
- Automation Through APIs
- Management Platforms
- Network Operations Center

Training

- Online Training
- Webinars
- Podcasts

© 2024 AT&T Intellectual Property - AT&T Proprietary

Ecosystem Partners

AT&T Ecosystem Partners offer a comprehensive suite of resources to help elevate solution providers' marketing strategies and streamline business operations

Marketing

Marketing as a Service (MaaS) partners can provide custom marketing campaigns & prospecting tools designed to generate new leads for your business.

Billing & Tax

Help you calculate taxes & fees for your customers & understand State and Federal obligations as a carrier & ease the burden of compliance while mitigating the risk of audits, fines and penalties.

APIs

Help you use Application Programming Interfaces (APIs) to create connections between business systems, enabling near-instant transmission of information.

Management Platform

Management software platform to handle pricing, quoting, order flow, service and support and more.

Network Operations

Network Operations Center (NOC) and tier 1 troubleshooting to manage your customer’s service needs.

© 2024 AT&T Intellectual Property - AT&T Proprietary

© 2024 AT&T Intellectual Property - AT&T Proprietary

AT&T Partner Exchange®

Start your journey

Contact our team of professionals to learn how you can start your journey with AT&T Partner Exchange.

Contact

jz3651@att.com

Website

https://partnerexchange.att.com

AT&T Business

Partner Panel

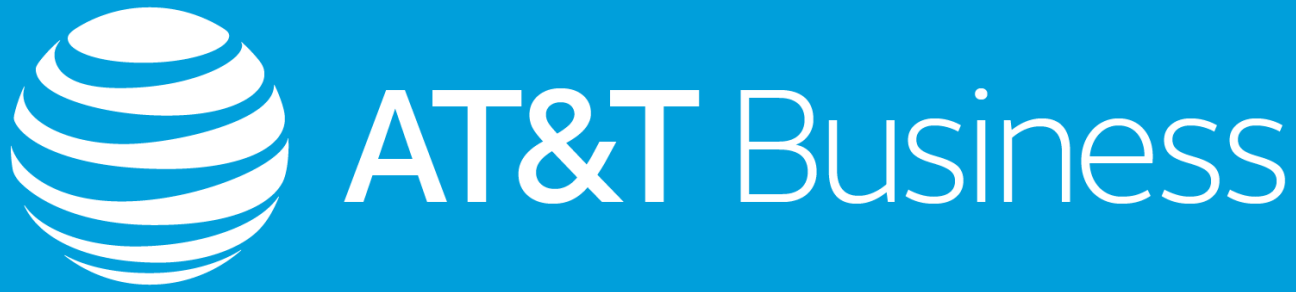
Michael McCrary

AT&T
Director Sales Engineering

Rickie Richey

Altaworx & AMOP
Founder and CEO

© 2024 AT&T Intellectual Property - AT&T Proprietary


AT&T Business

BREAK AND SPONSOR HALL

CLIENT SUMMIT

rev.io

SERGE DOUDY
DIRECTOR OF PRODUCT

rev.io

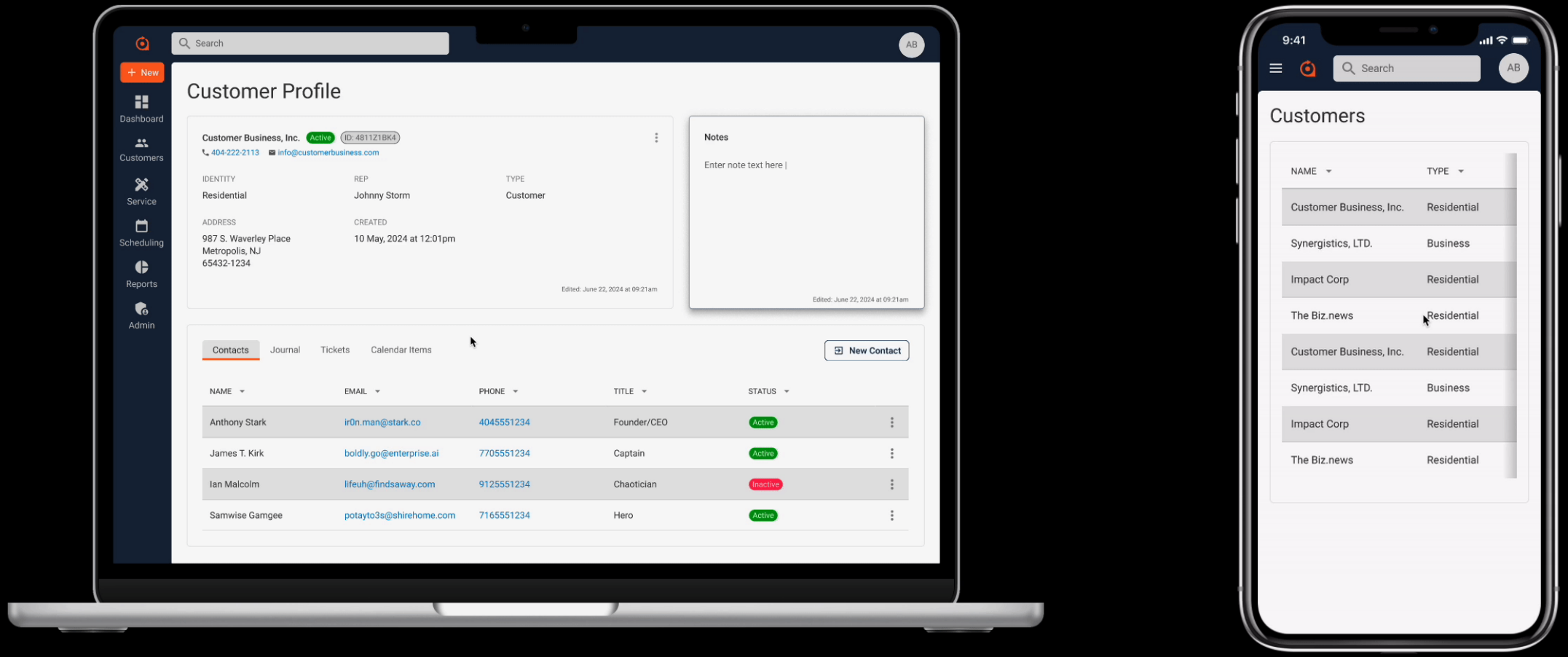
rev.io PSA

REV.IO PSA WEB PRODUCT VISION

To create the ultimate PSA experience by building the industry's only API- and AI-first PSA, with native complex communications billing capabilities for managed service providers with voice, mobile, and collaboration service offerings.

This platform will allow our clients to manage their business from quote-to-cash for their simplest to most complex offerings and grow revenue efficiently by providing integrated payments and advanced business intelligence to optimize the profitability of each transaction, project, and customer.

PSA WEB DEMO


Search
AB
New
Dashboard
Customers
Service
Scheduling
Reports
Admin
Customer Profile
Customer Business, Inc.
Active
ID: 4811Z1BK4
404-222-2113
info@customerbusiness.com
IDENTITY
Residential
REP
Johnny Storm
TYPE
Customer
ADDRESS
987 S. Waverley Place
Metropolis, NJ
65432-1234
CREATED
10 May, 2024 at 12:01pm
Edited: June 22, 2024 at 09:21am
Notes
Enter note text here
Edited: June 22, 2024 at 09:21am
Contacts
Journal
Tickets
Calendar Items
New Contact
NAME
EMAIL
PHONE
TITLE
STATUS
Anthony Stark
ir0n.man@stark.co
4045551234
Founder/CEO
Active
James T. Kirk
boldly.go@enterprise.ai
7705551234
Captain
Active
Ian Malcolm
lifeuh@findsaway.com
9125551234
Chaotician
Inactive
Samwise Gamgee
potayto3s@shirehome.com
7165551234
Hero
Active

9:41
Search
AB
Customers
NAME
TYPE
Customer Business, Inc.
Residential
Synergistics, LTD.
Business
Impact Corp
Residential
The Biz.news
Residential
Customer Business, Inc.
Residential
Synergistics, LTD.
Business
Impact Corp
Residential
The Biz.news
Residential

CONTINUE THE CONVERSATION

Daryl Nathanson
Sr. Product Owner

Loren Landry
Product Owner

Marsha Blobaum
Product Owner

- **Meet our Rev.io PSA Product Owners**
- **See demos of critical data flows in Rev.io PSA and our mobile app**
- **Bookmark and follow our Roadmap progress at content.rev.io/roadmap**
- **AI and Power BI reporting capabilities**

Josh Owen
VP of Data & Analytics

Complete our PSA Web Feature Prioritizations Survey

- Provide your critical input on the most important functionality
- Submit your survey to enter a drawing for a $500 gift card!

JOIN OUR PILOT PSA WEB PROGRAM

You will be able to have early-access to a PSA

Web demo environment to:

- **Explore the tool at your convenience**
- **Provide your feedback and input in real time**
- **Earn early access into our Pilot Program via QR code**

crexendo®
Powered by NetSapiens®

OUR COLLECTIVE PURPOSE IN ENABLING
“INDEPENDENT EXPERIENCE PROVIDERS”

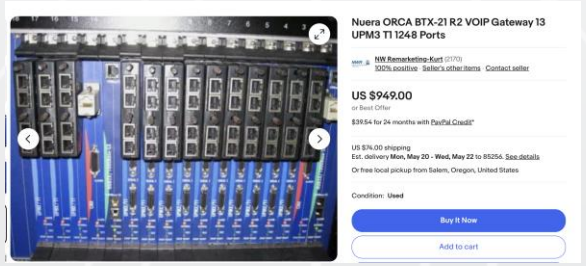
Anand Buch
Chief Strategy Officer & General Manager, Software Division
Crexendo, Inc (NASDAQ:CXDO)

MY TELECOM CONTEXT:

I BLAME IT ON THIS GUY!

PCSI®
A Cirrus Logic Company

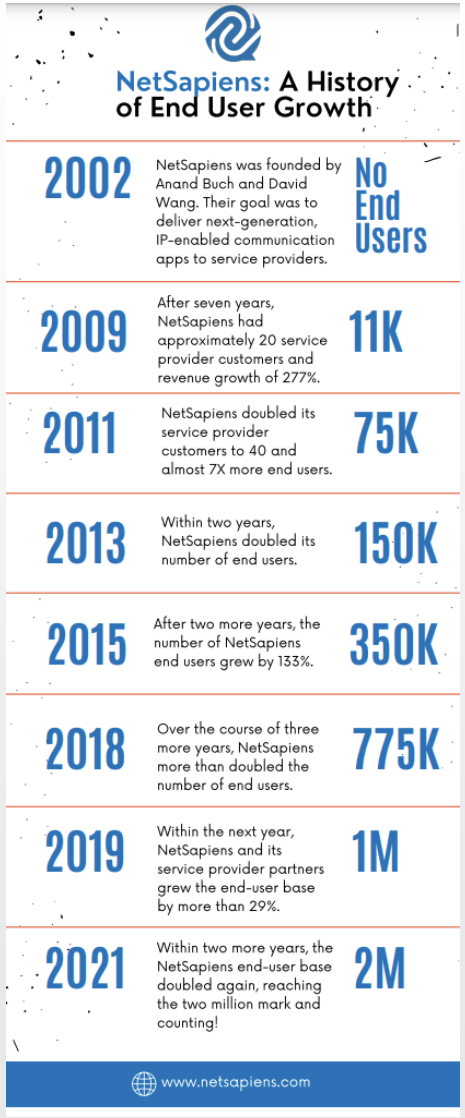
NUERA™



THE NETSAPIENS JOURNEY:
THE PURPOSE

Envisioning an industry in which competitive service providers of all sizes are able to join together as a collective force

THE NETSAPIENS JOURNEY: THE PROGRESS



Throughout the Years

A Brief History of NetSapiens Accomplishments & Milestones

2006
SNAPsolution Launch

2007-2010
- Go to Market
- Execute
- Iterate/Fine-Tune

2011
First UGM

2012-2015
- Product Usability
- Extensibility
- Business
- Fundamentals

2016
>100 Service Providers

2017-2020
- UC/UE Evolution
- Client Scale
- Company Scale

How many different names can I give it :

- SIP B2BUA, SIP Proxy Server
- Media Server, Media Switch
- Call Control Server/Platform
- VoIP Switch
- Softswitch (Class4/5)
- Feature Server/SBC
- UC Platform -> UC&C Platform
- xCAAS platform
- The list goes on...

BLAST FROM THE PAST….

THE FORK IN THE ROAD

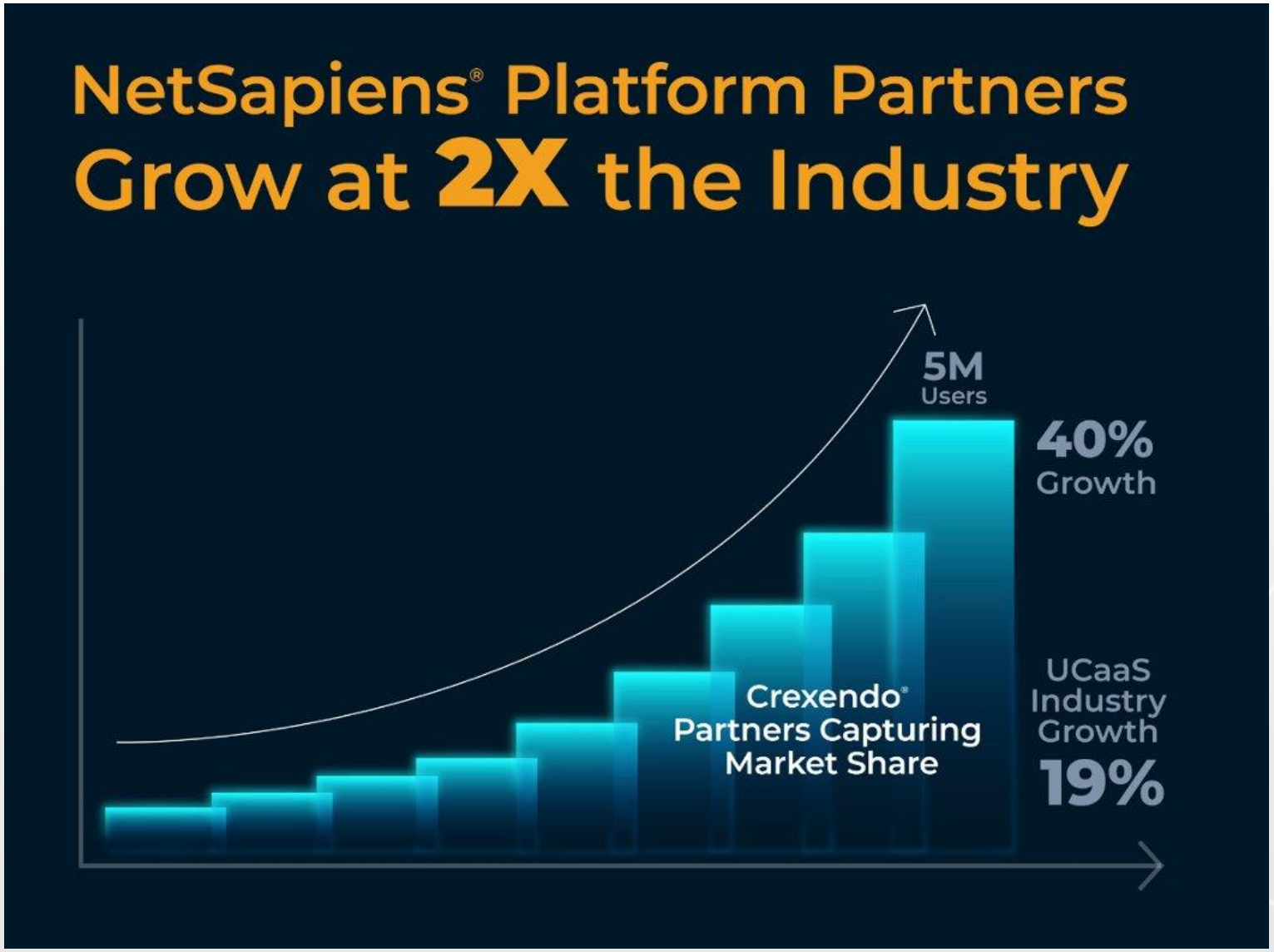
3. ***Sustainable Growth Financing Plan***

   What excited me about 2020 from a market perspective also 'scared' me, UC&C has become front and center, I subscribe to Andy Grove's notion that "only the paranoid survive". Hence, given we are 'on the radar', it is that much more critical that we have a strong enough balance sheet to compete and thrive and hence most importantly help our service providers grow in the marketplace.

THE NETSAPIENS JOURNEY:

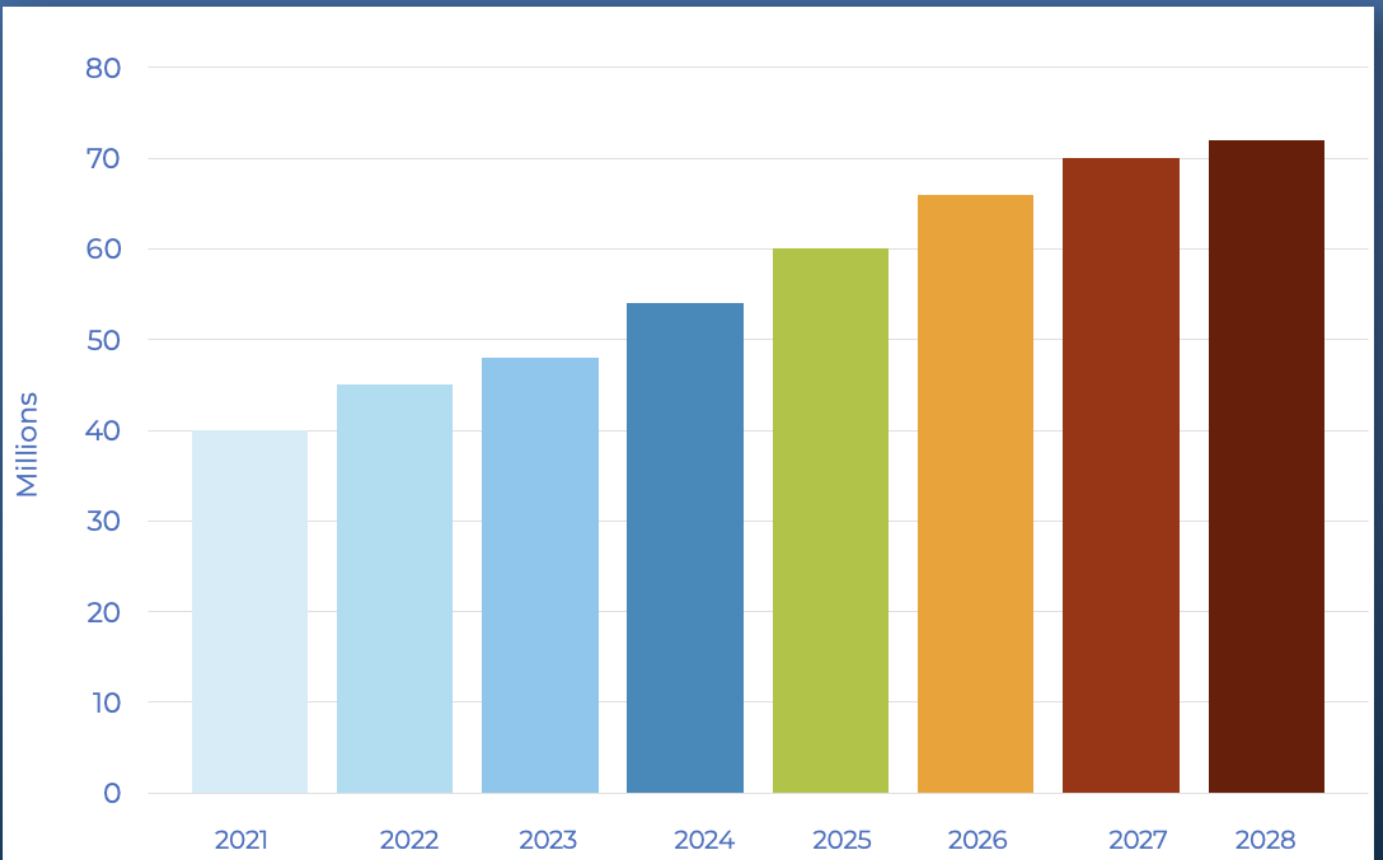
THE NEXT PHASE

WHERE WE ARE TODAY



Extending the 'OS' to enable "Independent Experience Providers"

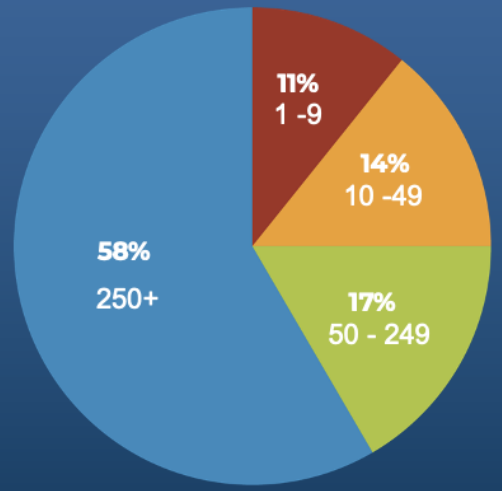
MARKET INSIGHTS



25m New UCaaS users added over the next five years

31m

Size of UCaaS SME user base in 2028

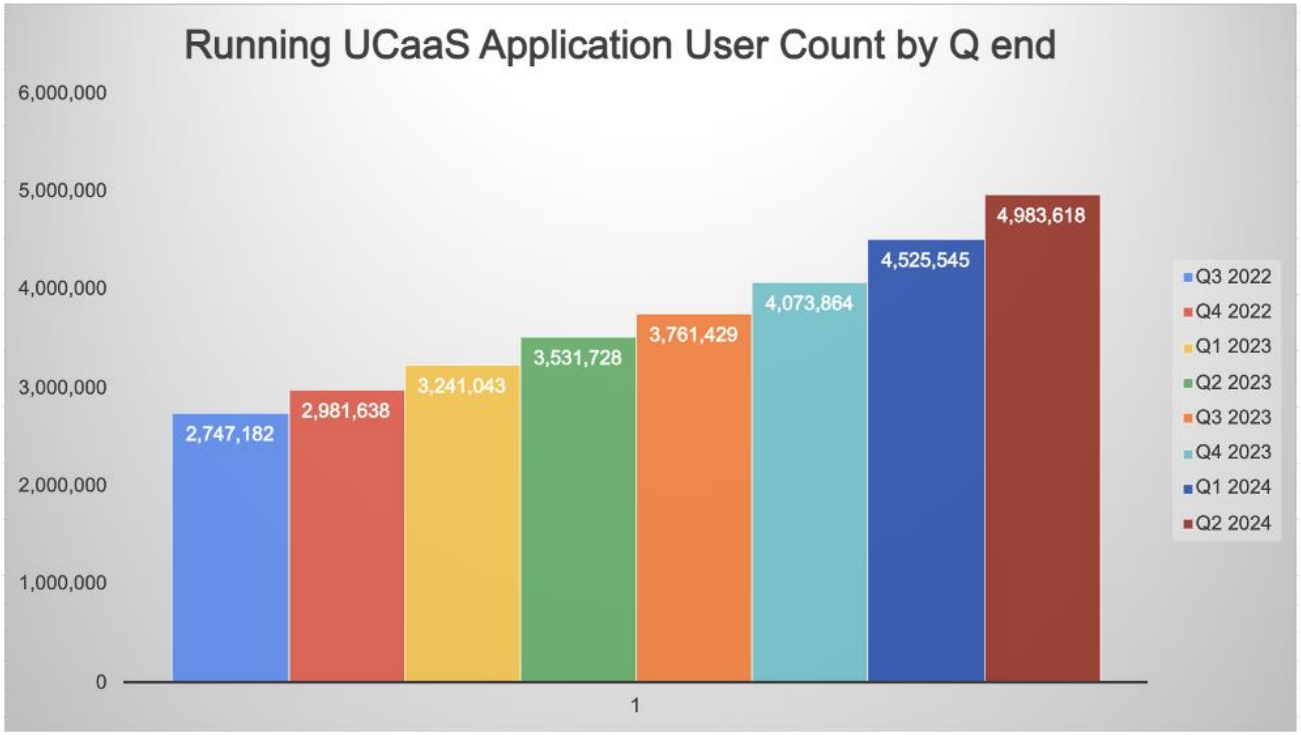


crexendo® ride the cloud

Source: Company Data

Nasdaq: CXDO

COMMUNITY INSIGHTS



>5m Application Users added

>200k

Domains Added

21

New Providers entered Community in 2023

>10%

of Provider Community now International

crexendo® ride the cloud

Source: Company Data

Nasdaq: CXDO

Strategy without tactics is the slowest route to victory. Tactics without strategy is the noise before defeat.
Sun Tzu
quotefancy

OUR COLLECTIVE OPPORTUNITY

OUR COLLECTIVE OPPORTUNITY

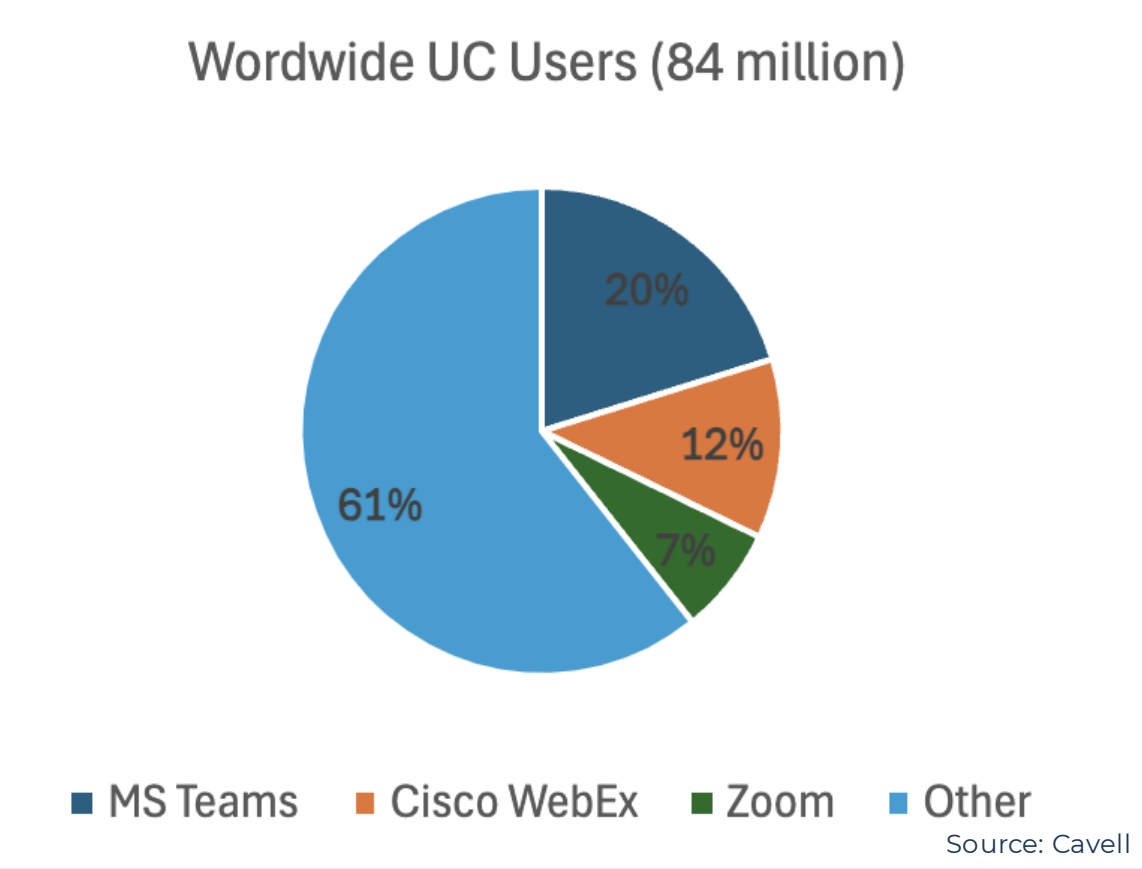
TRUSTED CONTINUED DIGITAL TRANSFORMATION

- Seamless Distributed/Hybrid Workplace
  - Cloud Conversion as a Foundation

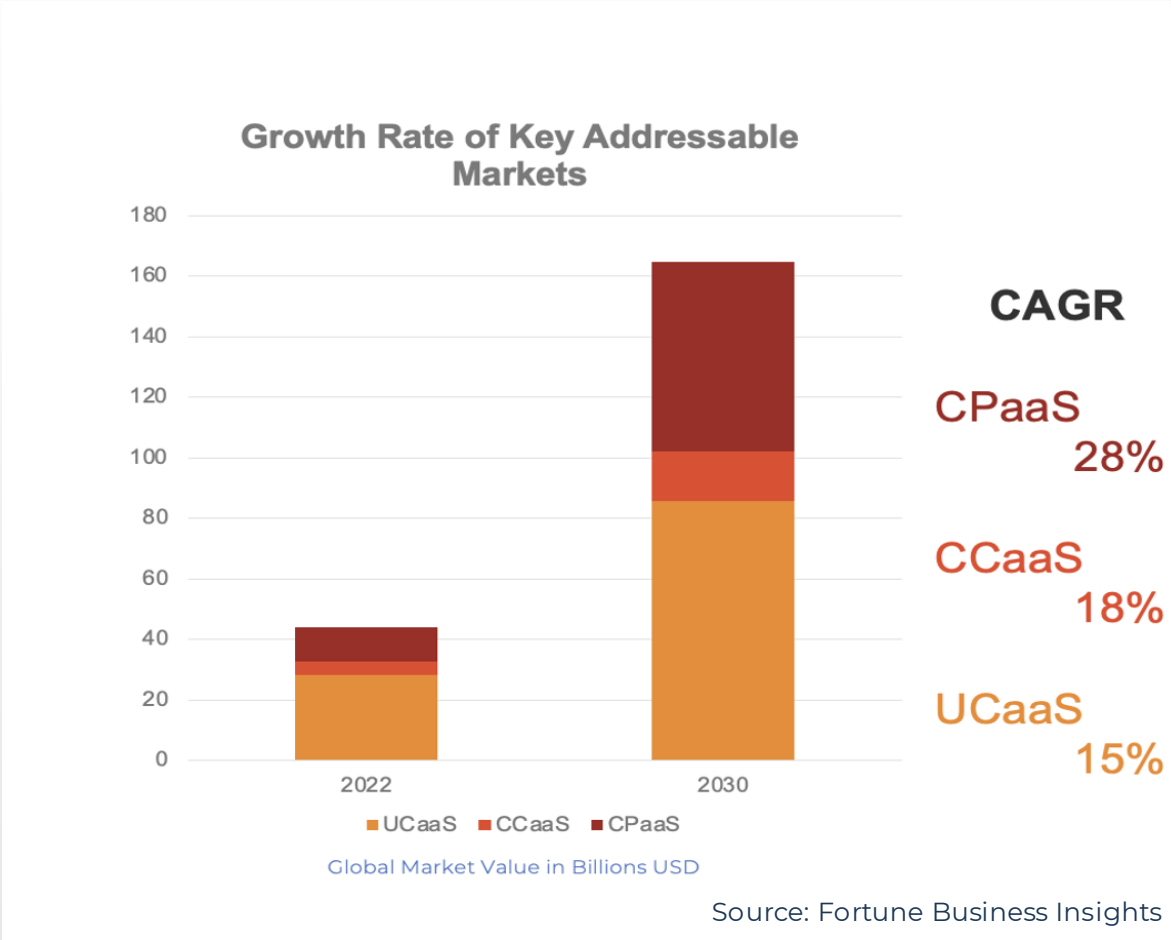
- “Your Domain/Channel” Specific Solutions
  - Differentiate, Differentiate, Differentiate
    - HINT: EXPERIENCE, EXPERIENCE, EXPERIENCE!

- Client Experience
  - Trusted digital transformation expertise versus ‘vanilla’ broader market player
    - Focus on finding the 20%!

COMPETITIVE LANDSCAPE/ ADDRESSABLE MARKETS



Source: Cavell



Source: Fortune Business Insights

PROVIDER GROWTH AREAS FOR THE NEXT 12 MONTHS

“Alongside AI, there’s an emphasis on integrating key business applications and enhancing contact center and customer experience (CX) services. As the line between unified communications and contact center solutions continues to blur, delivering holistic, seamlessly integrated platforms tailored for exception end-user experience will likely be a point of emphasis”

Source: CCA Survey of Members

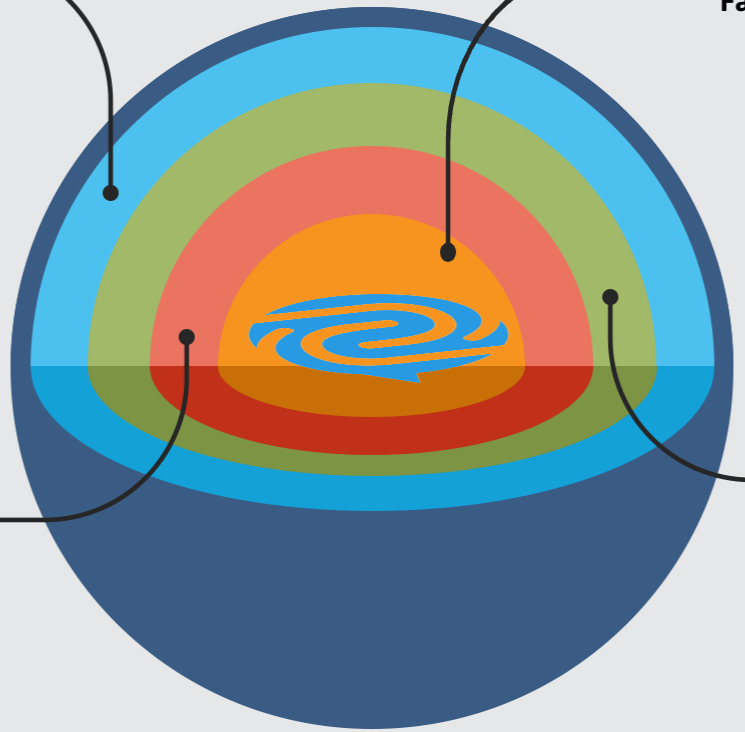
ECOSYSTEM TO DELIVER EXPERIENCES

Community of 225+ Independent Service Providers

Experiences
Delivered by..
"Experience Providers"
(Retail, Channel, Vertical, Contextual)

Operating System
Facilities Based
Or
Hosted
Or
Hybrid

netsapiens



Applications
Out of the Box
or
via Ecosystem
or
Provider built

rev.io

Application Users
UCaaS Use Cases
and/or
CCaaS Use Cases
and/or
CPaaS Use Cases
and/or
xCaaS Use Case
and/or ....

>5 million application seats across 200k+ Domains

crexendo® ride the cloud

THANK YOU!

Anand Buch

Chief Strategy Officer & General Manager, Software Division

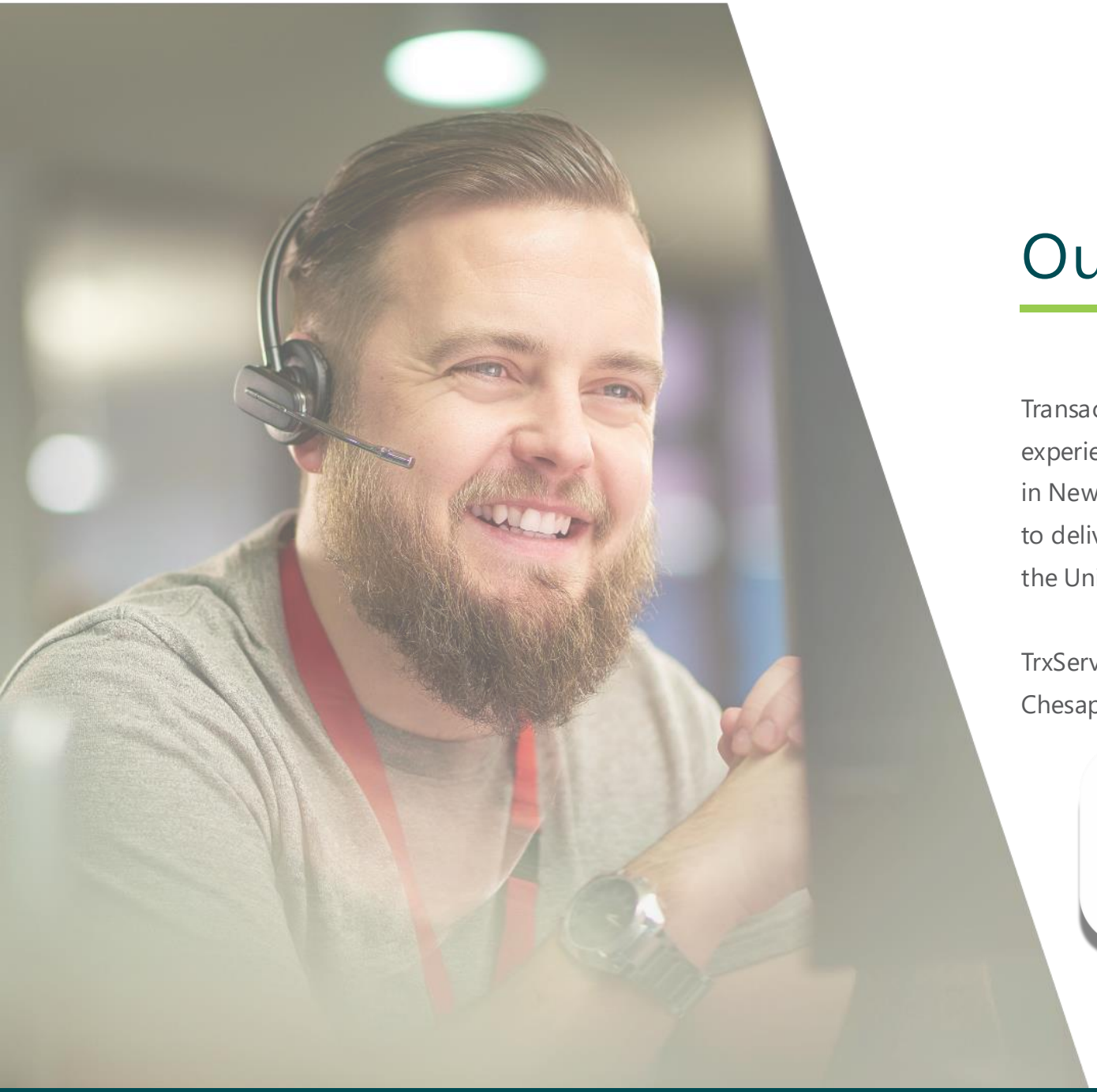
Crexendo, Inc (NASDAQ:CXDO)

Future of Financial Services

trx SERVICES

rev.io

www.trxservices.com



Our Company

Transaction Services is a leading provider in payments, with many decades of experience serving our customers from our headquarters in Atlanta and offices in New Jersey, North Carolina, Pennsylvania, and Colorado. Our commitment is to deliver superior products and world-class service to all customers throughout the United States.

TrxServices LLC is a registered ISO/SP/TPP of West America Bank, CA | Chesapeake Bank, VA | Esquire Bank, NY.

$12.2B
Annual Volume

20+ years
Leadership Tenure in Payments

+300
Integrated Software Vendors

Our Vision within PSA & Rev.io Billing

- Provide Rev.io customers a simple & single banking platform through their business management system to drive efficiencies and deliver frictionless customer experiences and economies of scale
- Be the fintech development & investment partner for all of Rev.io customers' needs
- Development Partner
- Investment Arm for the Future of Financial Services

trx SERVICES

Why TRX?

Suite of Fintech Services

Leave the complicated financial services ecosystem to us.

Growth Through Fintech

A fintech partner differentiates your business through financial services.

Integrated Experiences

- Streamlined merchant tools with our suite of solutions
- All-in-one platform
- Only solution integrated for Payables & the future of Financial services

Fintech- Roadmap

Accounts Receivable Integration

Our robust accounts receivable solution helps streamline invoicing, track payments, and manage customer relationships. It provides a centralized hub to efficiently handle all your A/R needs.

Accounts Payable Automation

Automate your accounts payable processes with our cutting-edge solution. It simplifies vendor enrollment and management, invoice processing, and payment approvals to drive greater efficiency and cost savings.

Q3/Q4 2024

1

Payments Microservice

A singular platform within Rev.IO Billing, PSA, and TBS for all of your recurring, one-time payment, and reporting solutions within your ERP & Billing Platform

2

Payables

The enhanced payables functionality will provide advanced bill payment capabilities, streamlined approval workflows, and seamless integration with your existing Rev.IO billing systems.

3

Agent Commissions

The agent commission feature will simplify the management of sales commissions, helping you accurately track, calculate, and disburse payments to your sales team.

Financing

Our new financing module will offer a range of capital solutions to support your business growth, including term loans, lines of credit, and invoice factoring.

Revenue Automation

trx SERVICES

All of your Financial Data & Processes in One-Place

- Merchant Processing History
- Accounts Payable
- Lending
- Query, Push, or Post ANY and ALL data into your platform
- Streamline your Financial experience

Integrations into your ERP & Accounting System

- Simplified Reconciliation
- Integrated into the major accounting tools
- Automation to reduce errors caused by manual processes to go above and beyond
- The only provider with a suite of solutions for Rev.io

Robust Reporting

- Statements, Processing, Data, Analytics, ACH Rejects, Chargebacks
- Automated Reporting
- Event based reporting
- Integrated ticketing system
- Enterprise Hierarchy Management

Secure, Easy & Cost Effective

- Microservice for Fintech
- Move Credit Cards and ACH to a streamlined payment solution
- Don't miss a day of taking payments
- Bundle and Leverage all services to drive down cost.

+35
Hours saved
per month

All in One Platform

~$50k
Savings

Streamline Payments

Accounts Receivable

Integrated Card Payments
Accept all major credit cards securely and efficiently inside of your CRM, POS, and ERP System.

Surcharging & ACH
Enable surcharging and direct bank transfers for seamless, low-cost payments to reduce on processing fees and improve cash flow.

Digital Payments
Digitize your customer experience with Mobile Payments, Online Payments, Text to Pay, Invoice Payments.

Recurring Billing
Automate your billing services with our robust recurring billing system and tokenization.

Retail Financing
Make high-ticket items more affordable. Enhancing customer satisfaction and loyalty with financial flexibility. Remove burden and risk and get paid next day.

Commercial Financing
Improve cash flows with more affordable access to capital to use towards acquisitions, inventory, revolver, etc.

Accounts Payable

Automate Accounts Payable
Remove the burden of paying partners/agents, vendor and supplier payments leverage our integrated solution drive efficiencies for your business.

New Revenue Stream
No Fees for Virtual Cards! We actually pay you a rebate on all card volume.

Automate Your Payments
We manage all of your payments to agents, suppliers and vendors from sending checks, paying ACH, and creating virtual cards.

Reduce Cost
Eliminate manual tasks, gain efficiencies. Leave your vendor and supplier enrollment to us. We will call all of your vendors and suppliers to optimize your program.

Gain Security
Multi-layer fraud protection and reduced credit exposure. Enhanced Chargeback rights.

Control Spend
Improve cash flow challenges with having control of when and how you pay your providers.

Value Added Services - Future

Embedded Banking

Use Rev.io as your business management suite with comprehensive banking features:

- Bank Account Management
- Funding & Lending
- Money Movement
- Business Valuations

Fraud Prevention

Protect your business revenue by deflecting chargebacks and stopping chargeback fraud in its tracks with AI & Machine Learning

- Pre-Dispute Alerts
- Order Insights
- Chargeback Responses
- Comprehensive Analytics
- Card Testing

Identity

Utilize AI and Machine Learning to not only stop bad actors, but also improve business onboarding, customer identification, etc.

- Identity Verification
- Bust Out Fraud
- Refund Fraud
- Linked Analysis
- Business Verification

All in One Platform

Funding & Lending

Identity & Fraud

Business Accounting

Chargeback Alerts

What's Next?

To learn more come to our deep dive session tomorrow (Wed., Sept. 11th).

Integrated Financial Solutions
in the Rev.io Platform - With TRX
10:00 AM – 10:45 AM
at Wilton

trx SERVICES

LUNCH

BREAKOUT SESSIONS START AT 1:45PM!