

INNOVATIVE SOLUTIONS – PEOPLE | PROCESSES | TECHNOLOGY

February 1, 2024



**ENTERPRISE RESOURCING PLANNING
WEB-BASED SOFTWARE
REQUEST FOR PROPOSAL (RFP)
CITY OF SWEENEY, TEXAS**

Prepared by:

Aclarian LLC

4240 West Morrison Avenue

Tampa, Florida, 33629

Office: 855-422-5762

EIN/SS Number: 85-3378848

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1. Executive Summary

Introduction

Aclarian is pleased to present our proposal for implementing our cutting-edge web-based budget and reporting platform for the City. Aclarian began its operations in 2020, developing local government ERP software using the latest modern web technology available, Aclarian offers a robust and customizable solution, tailored to meet the unique needs of diverse municipal and other local government agency clients.



Financials



Cloud



Integration

Company Overview

Aclarian LLC was incorporated in Tampa, Florida in 2020 with a vision of providing powerful public sector software to local government. Our product line has since grown to an extensive list of modules within our ERP solution that range from our core general ledger suite to interactive budgeting, custom reporting, task management, and our lease accounting module for GASB 87 and 96.

Aclarian utilizes a multi-tenant architecture offers businesses a competitive advantage by providing scalability and agility, allowing them to adapt quickly to evolving market demands and scale their operations without significant IT overhead. In contrast, established companies relying on outdated technology may struggle to keep pace with modern business requirements, leading to inefficiencies, higher costs, and limited flexibility in meeting the dynamic needs of today's digital landscape.

Aclarian is driven to excellence in all areas of our business by focusing 100% of our efforts on solving our customers' problems, creating deep client relationships through unparalleled support, and pursuing continued improvement in our software through innovation and customer feedback.

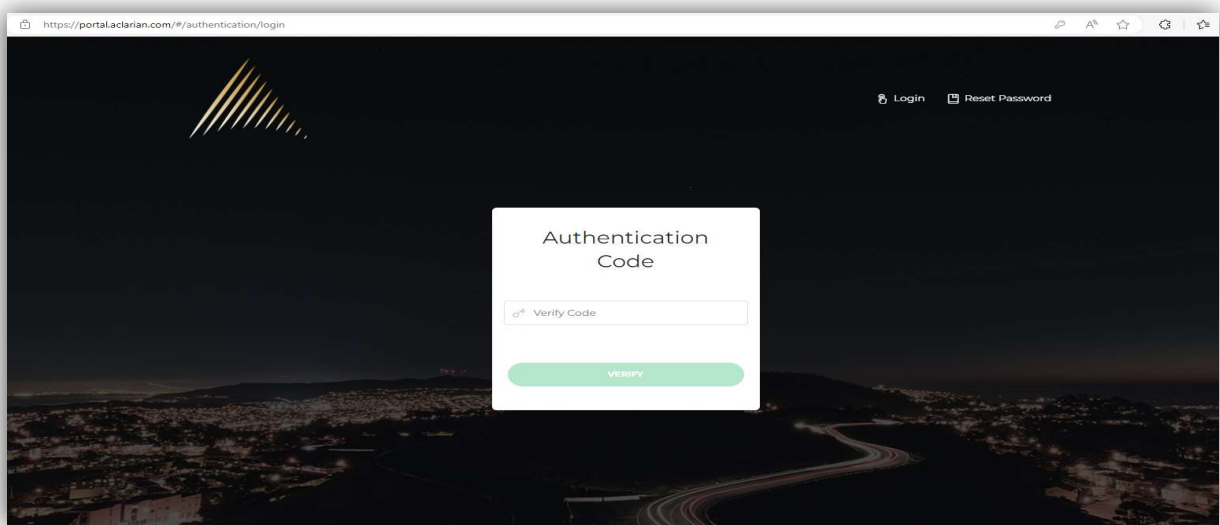
ERP Overview

Since inception, when Aclarian introduced a new, cutting-edge web-based ERP software platform for local government, customers have onboarded with us. Our software uses Angular v13 on the front end (platform designed by Google and used for developing web applications), and Microsoft.NET as the database engine on the back end. Aclarian software provides all the major functions requested in this RFP. We are proposing a web-based solution, easily accessed by any user with internet access and an available.

Aclarian Advantages

- **Web-Based Architecture:** Aclarian's ERP platform operates in the cloud, offering anytime, anywhere access to critical business data. This eliminates the need for costly on-premises infrastructure and ensures flexibility, scalability, and increased operational efficiency—qualities particularly beneficial for government clients with complex structures and remote locations.
- **Customization and Integration:** We understand that every organization has unique requirements, including government agencies with specific regulatory and reporting needs. Therefore, our ERP solution is highly configurable, allowing your team to tailor the software to these distinct requirements. Additionally, we prioritize seamless integration with existing software applications, promoting efficient data exchange and eliminating data silos within your organization, a vital aspect for government entities handling vast amounts of data.
- **User-Friendly Interface:** Aclarian's ERP platform boasts an intuitive and user-friendly interface, reducing the learning curve and enhancing user adoption across the City and government clients. This ease of use improves productivity and empowers employees to leverage the system's full potential quickly, ensuring smooth implementation and uptake.
- **Strong Security Measures:** Data security is paramount in today's digital landscape, especially for government organizations dealing with sensitive information. Aclarian prioritizes data protection and employs robust security measures to safeguard such data. Our platform adheres to industry best practices and regulatory standards, ensuring the confidentiality and integrity of your data as well as compliance with government security requirements.

Aclarian MFA - Authorization Option for additional security.



Conclusion

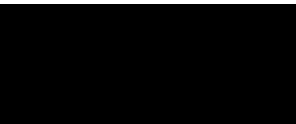
Focused on building modern, scalable, innovative, and configurable accounting software solutions for local governments, Aclarian is well-equipped to meet the evolving needs of the City. We help you optimize operations and achieve long-term success, just as we have done with numerous government clients that have recently onboarded with us over the past few years. Our commitment to excellence ensures that we will work diligently to exceed your expectations and deliver tangible value to the City of and its constituents.

Thank you for considering Aclarian's local government ERP solution. We are eager to discuss the specifics of our proposal further and demonstrate how our platform can revolutionize your business operations, making a positive impact on government efficiency and service delivery.

Contact Information

Aclarian LLC
Matthew Akins
4240 West Morrison Avenue
Tampa, Florida, 33629
Office: 855-422-5762
[REDACTED]

Proposer has executed this RFP in their corporate name by the President, and the corporate seal is affixed and attested by the secretary. The corporate address and state of incorporation is shown below the signature.



Andrew P. Laflin, President
Aclarian LLC

Aclarian LLC - Incorporated in State of Florida

2. Requirements

Please see attached Requirements forms herewith.

Web-based Software

Aclarian's web-based ERP software platform uses Angular v13 on the front end (platform designed by Google and used for developing web applications), and Microsoft .NET as the database engine on the back end. There are no third-party products associated with Aclarian ERP's core modules.

We are proposing a web-based solution, easily accessed by any user with internet access and an available web browser (Google Chrome, Microsoft Edge, etc.), and hosted in the cloud using Microsoft Azure (second largest cloud provider behind Amazon Web Services). No products are to be hosted by the City since Aclarian's ERP solution is a multi-tenant environment hosted in the cloud using Microsoft Azure.

3. Pricing

Please see attached Pricing / Costs forms herewith.



City of Sweeny, TX

Annual Budget: \$ 4,500,000
Population: 3,500

Management - PP, PM, CM	15%
Contingency	10%
Labor Rate (Blended)	\$ 175

Represents Project Planning, Project Management, & Change Management
Unplanned Discovery Items
Blended Labor Rate

Phase I

Major Business Process (Module)	Requirements Gathering	Data Migration & Custom Development	QA Testing	Training	Deployment & Post-Implementation Support	Direct Hours	Mgt Hours	Total Hours	Timeline - Calendar Year 2024
Project Management Phase I							82	82	
General Ledger	20	20	16	8	16	80		80	Mar-Jul
Purchasing	20	10	16	8	16	70		70	Mar-Jul
Payments (A/P)	10	10	16	8	16	60		60	Mar-Jul
Billing/AR	10	10	16	8	16	60		60	Mar-Jul
Projects & Grants	10	10	10	4	16	50		50	Mar-Jul
Cashiering	10	10	10	4	16	50		50	Mar-Jul
Treasury Management (Bank Recon)	10	10	10	4	16	50		50	Mar-Jul
Workflow Management	10	4	4	4	4	26		26	Mar-Jul
User Security	10	4	4	4	4	26		26	Mar-Jul
Municipal Court	10	40	4	4	4	62		62	Mar-Jul
Secure Signatures	5	4	2	2	2	15		15	Mar-Jul
Contingency Phase I							55	55	
Phase I Sub Total:	125	132	108	58	126	549	137	686	Mar-Jul

Phase II

Major Business Process (Module)	Requirements Gathering	Data Migration & Custom Development	QA Testing	Training	Deployment & Post-Implementation Support	Direct Hours	Mgt Hours	Total Hours	Timeline - Calendar Year 2024
Project Management Phase II							62	62	
Human Resources & Payroll	20	20	16	8	16	80		80	Jul-Dec
Utility Billing (UB)	20	20	16	8	16	80		80	Jul-Dec
Service Orders - UB	10	10	8	8	8	44		44	Jul-Dec
Capital Assets Management	10	8	8	4	8	38		38	Jul-Dec
Budgeting	20	8	8	8	8	52		52	Jul-Dec
Permitting	8	8	8	8	8	40		40	Jul-Dec
Code Enforcement	8	8	8	8	8	40		40	Jul-Dec
Custom Reporting	8	8	8	8	8	40		40	Jul-Dec
Contingency Phase II							41	41	
Phase II Sub Total:	104	90	80	60	80	414	103	517	July-Dec

Pricing Summary

Total Hours	229	222	188	118	206	963	240	1,203
Total Estimated Cost								\$ 210,525
Direct Hours Implementation Summary						963		\$ 168,525
Management Summary							144	\$ 25,200
Contingency Summary							96	\$ 16,800
Small Hardware								\$ 1,600
Travel & Per Diem								\$ 3,000
Non-Recurring - Total								\$ 215,125
Discount (%)						55%		\$(118,319)
Non-Recurring Net Total								\$ 96,806
Recurring - Annual Subscription						25		\$ 31,000



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ACLARIAN SOFTWARE PRICING MODEL

SUBSCRIPTION FEES - USER PACKAGE

User Package	Annual	
	Subscription Fee	Total SaaS Fee
1 - 15 users	\$ 16,500	\$ 16,500
16 - 25 users	\$ 14,500	\$ 31,000
26 - 50 users	\$ 12,500	\$ 43,500
51 - 75 users	\$ 10,500	\$ 54,000
76 - 100 users	\$ 8,500	\$ 62,500
101 - 125 users	\$ 7,500	\$ 70,000
126 - 150 users	\$ 6,500	\$ 76,500
151 - 175 users	\$ 5,500	\$ 82,000
176 - 200 users	\$ 4,500	\$ 86,500
Each additional 25 users above 200	\$ 3,500	

4. Implementation Methodology

With our combined team experience of many implementations, we have learned several things to make this process better. Typical examples include:

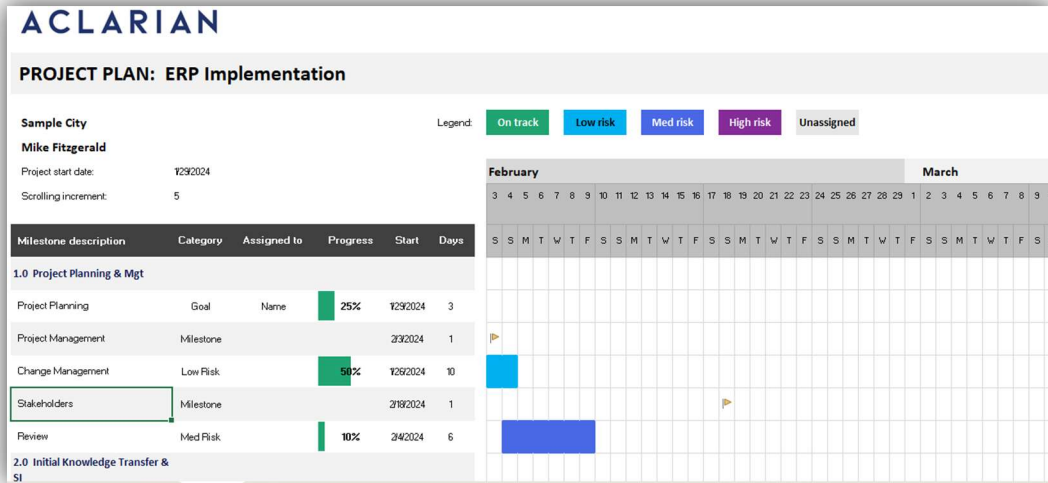
1. **Entity-Wide Buy-In:** It is critical to have all parts of the City informed of the plans and get everyone involved in the solution. Change management includes departments in key activities, such as: Initial Demonstration, Project Kick-off, and Business Process Review Sessions.
2. **Data Conversion /Review:** Mistakes converting data delay projects, cause rework, and negatively affect team member morale. To ensure that there are no data conversion errors, we do two things. First, we review the data with the key stakeholders early in the process. This provides ample time to correct any data conversion issues. Second, for critical systems like Utility Billing and Payroll, we run at least one, and sometimes two, cycles in parallel.
3. **Test Data and Environment:** When problems with data or processes arise late in the project, it is much more difficult to correct them. We believe that providing access to a test system, with your test data, allows for any potential problem identifications and corrections early without impacting the project schedule.
4. **Integrations:** It may be necessary to provide integration to another system that was not planned for. Aclarian makes every effort to help identify integrations. Aclarian also provides “code-less” configurable integrations. These allow for the creation of exports or imports into a wide variety of formats, without writing any software.
5. **Hardware:** Delays in procuring hardware (i.e. payroll/time clocks, inventory scanners) can have disastrous impacts on the project schedule. To head off any delays, we meet with your IT team early in the project to review planned hardware. If new hardware must be purchased, we will collaborate with you to outline the specifications.
6. **Manage the Unexpected:** Aclarian prides itself on being responsive, both in terms of training and development. If an unforeseen issue arises, our “Never let a customer fail” motto guides our response. We work together to find a way to resolve the problem and keep the project on schedule.

Aclarian Implementation Methodology

Step	Description	Task	Description	Deliverable
1	Project Planning & Management			
		1.1	Project Planning	Contract, SOW, ESC, Project Manager, Project Team, SME
		1.2	Project Management	Project Plan, Status Reports, Issues & Enhancements Log
		1.3	Change Management	Stakeholder Assessment, Communications Plan
2	Initial Knowledge Transfer & Software Install			
		2.1	Software Install/Environments	Set up Client instances, URL's
		2.2	Project Team & SME Initial Trai	Project Room Set up, Kickoff Training
3	Design			
		3.1	Business Process Workshops	New Business Processes Plan
		3.2	Policy & Procedures Review	Client P & P Plan, Internal Controls, Narratives
		3.3	Workflow	Workflow Plan
		3.4	User Security & Roles	User Security Plan
		3.5	Integration	Integration Plan
		3.6	Reporting & Dashboards	Report Plan
		3.7	Web Portals	Web Portal Plan
4	Development			
		4.1	Configuration	Chart of Accounts, Tables, Data Management, Workflow,
		4.2	Conversion	Historical Data, Vendors, Customers, PO's, Employees, etc.
		4.3	Interfaces	Direction, Frequency, Initial Test
		4.4	Enhancement Builds	Forms, Reports
5	Testing			
		5.1	Unit/Initial Testing	Test Plan, Test Scripts
		5.2	Integration Testing	
		5.3	Performance Testing	
		5.4	User Acceptance Testing	Client Acceptance & Sign off Transmittal
7	Training			
		7.1	Training	Training Plan, Training Materials, Training Certificates
8	Go-Live			
		8.1	Go-Live	Cut Over Plan, Post Go-Live Plan
9	Post Production Support			
		9.1	Post Production Support	Issues & Enhancements Log, Final Acceptance & Close Out

Aclarian Implementation Plans

As part of any significant engagement Aclarian utilizes an approach based on the Project Management Institute’s “Project Management Body of Knowledge (PMBOK).”



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TRAINING PLAN

TIME	SESSION 1	SESSION 2	SESSION 3	SESSION 4	SESSION 5
	Day Name Date Location	Day Name Date Location	Day Name Date Location	Day Name Date Location	Day Name Date Location
09:00 - 09:30					
09:30 - 10:30					
10:30 - 10:45	Break	Break	Break	Break	Break
10:45 - 11:15					
11:15 - 11:45					
11:45 - 01:15	Lunch	Lunch	Lunch	Lunch	Lunch

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February 18, 2024



CHANGE MANAGEMENT PLAN
SAMPLE CITY, FLORIDA

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INNOVATIVE SOLUTIONS – PEOPLE | PROCESSES | TECHNOLOGY

February 18, 2024



REPORT PLAN
SAMPLE CITY, FLORIDA

Prepared by:
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EIN/SS Number: 85-3378848

Phased Approach

Software implementations can be categorized as a “phased approach” or “big bang” approach. The appropriate approach can be determined during contract negotiations and/or Project Planning step. Best practices lean towards a phased approach, so that both the client and Aclarian can match resources more efficiently. This allows the client to be able to dedicate resources to the implementation, while simultaneously running the day-to-day demands of the municipality.

Phase Timeline

Phase I will be conducted during the months of March through July 2024 and Phase II will be conducted during August through December 2024.

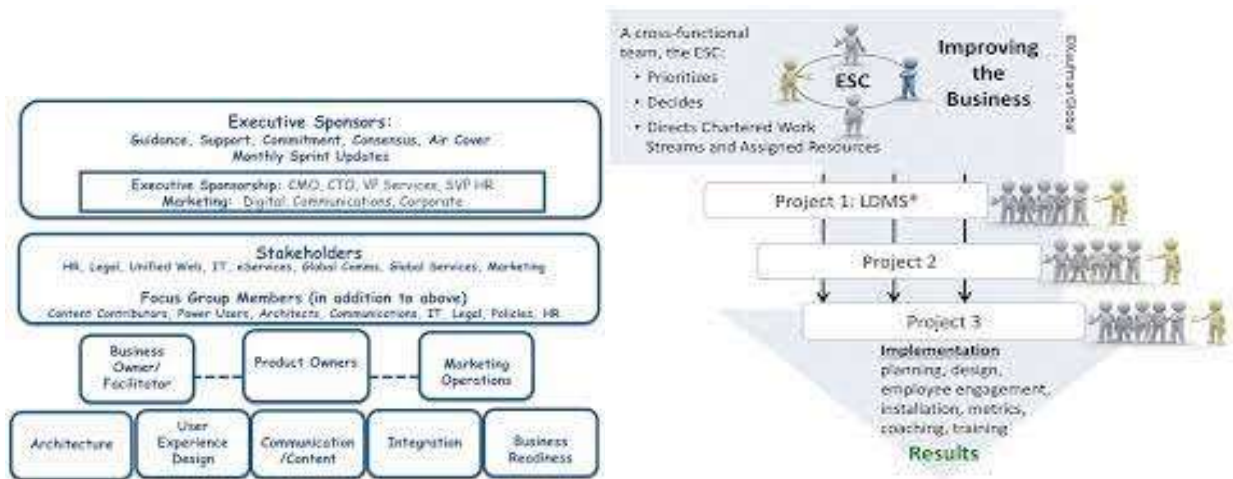
Phase I	March	April	May	June	July
Module					
Project Management Phase I					
General Ledger					
Purchasing					
Payments (A/P)					
Billing/AR					
Projects & Grants					
Cashiering					
Treasury Management (Bank Recon)					
Workflow Management					
User Security					
Municipal Court					
Secure Signatures					
Contingency Phase I					

Phase II	Aug	Sept	Oct	Nov	Dec
Module					
Project Management Phase II					
Human Resources & Payroll					
Utility Billing (UB)					
Service Orders - UB					
Capital Assets Management					
Budgeting					
Permitting					
Code Enforcement					
Custom Reporting					
Contingency Phase II					

Executive Steering Committee

A steering committee is a form of corporate governance made up of high-level executives, authorities, or stakeholders who provide strategic oversight and guidance to one or more projects within an organization. When these people meet, it's called a Steering Committee meeting.

Your company's executive steering committee may have a wide range of responsibilities, including establishing organizational structure for your company's projects, and delegating the authority necessary to accomplish those projects. Executive steering committees also develop vision and mission statements for projects being completed for your business. They also report progress on the organization's projects to company leadership according to a timetable you establish.



Project Manager

The project manager is an essential part of most projects, as these are the professionals who keep the project on schedule and within budget. Project managers act as the representative between project team members and project stakeholders, communicating with both groups to ensure everyone is aware of expectations and can understand more about how a project is faring. Sometimes, a project manager also uses a project coordinator or assistant to accomplish their tasks, which may include:



Project Team

A project team is a group of individuals who are working on a shared project together, with shared goals and objectives. Everyone on the project team has a responsibility to perform their tasks and contribute to the success of the project. Because there are usually several individuals on the project team, you may find a mixture of experts with varying skills, abilities and experiences, and it's common for a project team to be cross-functional or to comprise people from different teams within the organization.

A project team can also include both Aclarian and City employees, stakeholders, and subject matter experts. Depending on the project, you may have team members who work full-time or part-time on the project. Some individuals may be involved throughout the project, while others are only part of the project team during a specific phase.

On a project team, each member has certain responsibilities or specific tasks that help contribute to the success of the project. That's why it's important to have varying roles on the project team.

User Report

Clients
City of Madeira Beach

SEARCH RESET

Page Size: 20

SAVE GRID LAYOUT EXPORT CLEAR FILTERS

First Name	Last Name	Email	Title	Client	Access Type
Alexandria	Lollis	alollis@madeirabeachfl.gov	Administrative Assistant	City of Madeira Beach	Standard Access
Andrew	Morris	amorris@madeirabeachfl.gov	Long Range Planner	City of Madeira Beach	Standard Access

Forms Workflow Report

Page Size: 20

SAVE GRID LAYOUT EXPORT CLEAR FILTERS

Module	Form Name	# of Approvers	First Approver	Second Approver	Third Approver	Fourth Approver	Fifth Approver	Sixth/Final App...
Payments	Check Request	4	Department Head	Approvals > \$2,500	Impact Fee Fund Appr...			Karen Paulson
Purchasing	Change Order	4	Department Head	Andrew Laffin	Robin Gomez			Karen Paulson
Purchasing	Purchasing Requisition	4	Department Head	Andrew Laffin	Robin Gomez			Karen Paulson
Purchasing	Bid Form	4	Department Head	Robin Gomez				Karen Paulson
Capital Assets	Capital Asset Disposal ...	3	Andrew Laffin	Robin Gomez				Patrick Cade
Licensing	Business License	3	Lisa Scheuermann	Andrew Morris				Geraldine Nilles
Payments	Invoice Approval Form...	3	Department Head	Approvals > \$2,500				Karen Paulson

Project Team Roles

The proposed Aclarian project team will consist of the following roles with a high-level overview of tasks to be performed:

Project Manager

- Will lead client software implementation efforts and ensure an overall successful implementation.
- Will provide primary consultation to the City on complex issues and considerations.
- Will manage completion of the Aclarian ERP implementation to include project reports and status updates.

Software Consultant

- Will assist the Project Manager on all implementation activities and will coordinate assignment, completion, and testing of development tasks for each module.
- Perform tasks as assigned on the Aclarian ERP Implementation Forms and Checklist.
- Will lead onsite training efforts with all applicable City staff.

Software Technical Team

- Complete assigned development tasks, such as data conversion import activities, custom development of various forms, or setting up particular configurations as requested by the City.

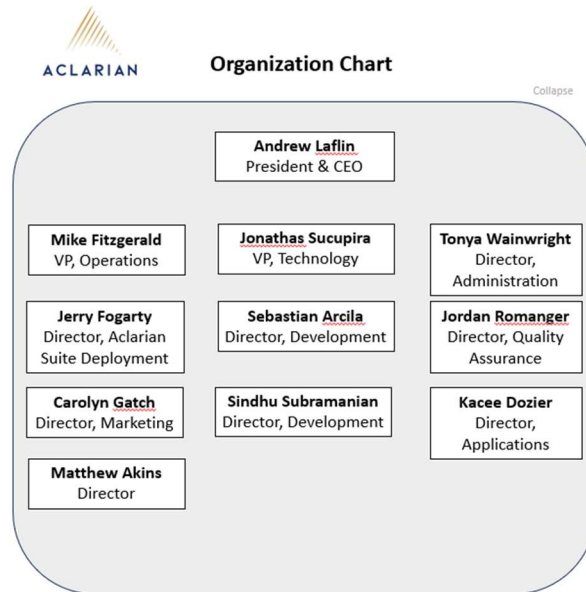
Quality Assurance Team

- Perform software testing on completed tickets applicable to the City during implementation and communicate results to the assigned Software Consultant.

Subject Matter Experts

A subject matter expert (SME) participates from each primary functional area of the City. A subject matter expert plays a crucial role on a project team by providing in-depth knowledge, specialized skills, and valuable insights related to a specific area, ensuring the team has the necessary expertise to make informed decisions and achieve project success.

5. Support Strategy



Texas Team

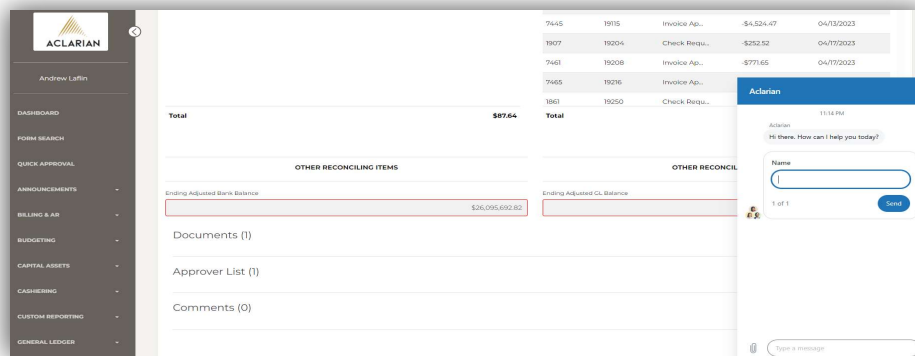
Aclarian maintains a dedicated Texas team with three team members strategically located in Dallas and Houston, ensuring prompt and efficient customer service, ongoing support, and onsite visits as needed to guarantee the successful implementation of their web-based software.

Ongoing Support

The Aclarian Support Team will address:

- Issues, answer user questions, and continue training and education initiatives.
- Will monitor system performance, gather feedback, and implement necessary enhancements or updates.
- Can be contacted by phone, email, or a Help Desk chat feature within the ERP portal during regular business hours, and the Help Desk chat feature after hours.
- Provide troubleshooting and training services to all users, with an expected response time of 3 minutes or less.

Below is a picture of the Aclarian Help Desk chat support popup that is available to all users.



6. Other Information

Proposer Team

Our team of highly skilled professionals includes experienced CFOs, accountants, financial analysts and developers who are well-versed in the unique challenges faced by government agencies and businesses alike. By outsourcing your CFO and accounting functions to Aclarian, you can tap into our extensive knowledge and industry best practices, enabling you to make informed financial decisions, optimize resource allocation, and drive sustainable growth.

Name	Professional Designations	Government Years	Total Professional Years	Expertise
Andrew Laflin	CPA	10	19	Audit and Software
Mike Fitzgerald	MBA, CGFO, CPPO	22	37	Financial Operations and Software
Jerry Fogarty			24	Banking
Olga Swinson	CPA	37	37	Government
Beverly Fullington		45	45	Government
Matthew J. Akins	MBA, Series 50, Series 65	15	18	Structured Finance
Jordan Romager	MS	5	5	Software
Kacee Dozier		2	10	HR / Payroll
Jonathas Sucupira		4	15	Software and Development
Totals		145 Years	210 Years	

Please find resumes for each consultant on the following page in this section. Consultant names provided are subject to resource availability. City has the right to interview and select project manager.

Andrew P. Laflin, CPA

Aclarian LLC (www.aclarian.com)

President / CEO



Profile

After spending 17 years in public accounting and serving as a former audit partner of a large regional accounting firm, Andrew joined Aclarian in 2020, providing implementation and training services to local governments of Aclarian's web-based local government ERP software. This solution provides users with a modern, efficient alternative to traditional government accounting systems and eliminates manual, redundant business processes typically found in a local government's current technology environment.

Andrew also provides outsourcing, consulting, and advisory services entirely devoted to serving local governments. Andrew is a frequent speaker at various local and state-wide conferences throughout the Country, primarily affiliated with the Florida Government Finance Officers Association (FGFOA).

Client experience

City of Cape Coral	Hillsborough County Aviation Authority
City of Moore Haven	Hillsborough Transit Authority (HART)
City of Lake Worth Beach	Lee County Metropolitan Planning Org.
City of Madeira Beach	Manatee County
City of New Port Richey	Pasco County
City of Port Richey	Pinellas County
City of Safety Harbor	Pinellas Suncoast Transit Authority
City of Fellsmere	Sarasota County
City of Temple Terrace	AmSkills (Education / NonProfit)
Clearwater Downtown Development Board	Tampa Bay Area Regional Transportation Auth.
Collier County	Tampa Hillsborough Expressway Authority
Forward Pinellas	Village of Indiantown
City of Hampton	Town of Redington Beach
City of Bushnell	Glades County
City of Sarasota	Osceola County

Education

- Bachelor of Arts in Accounting, University of Notre Dame, Notre Dame, Indiana
- Master of Accountancy, University of South Florida, Tampa, Florida

Professional Development

- American Institute of Certified Public Accountants (AICPA)
- Certified Public Accountant in the state of Florida (CPA)
- Government Finance Officers Association (GFOA)
- Florida Government Finance Officers Association (FGFOA)

Mike Fitzgerald, MBA, CGFO, CPPO

Aclarian LLC (www.aclarian.com)

Vice President, Operations
Tampa, FL



Profile

Mike has over 34 years of public and private finance experience. He currently serves as Vice President of Outsourced Services for Aclarian LLC, providing outsourcing, consulting, and advisory services entirely devoted to Florida local governments.

Mike has held various COO / CFO / Managerial roles in private equity firms, Anheuser-Busch, KPMG, Booz Allen & Hamilton, local governments and as an officer in the United States Air Force. Mike has served as a Treasurer, Finance Director, Accounting Manager, Administrative & Fiscal Manager, Budget Supervisor roles in various departments – Accounting, Public Works, Water, Facilities, Parking, Transportation, Stormwater. He has expertise in many ERP platforms to include Oracle and SAP.

His government experience is listed below.

Client Experience

- | | |
|------------------------------------|------------------------------------|
| Broome County | Hillsborough County |
| City of Lake Helen | Miami/Dade County |
| City of Lake Worth Beach | Nassau County (NY) |
| City of Madeira Beach | New York Board of Education |
| City of Fellsmere | United States Air Force (USAF) |
| City of Tampa | United States Army (USA) |
| Government Accounting Office (GAO) | United States Navy (USN) |
| Government Printing Office | Special Operations Command (SOCOM) |

Education

- Master Business Administration, University of Tampa, Tampa, FL
- Bachelor of Arts, University of South Florida, Tampa, FL

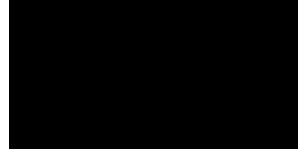
Professional Development

- Florida Government Finance Officers Association (FGFOA)
- Certified Government Financial Officer (CGFO)
- Certified Public Procurement Officer (CPPO)
- President for the Government Finance Officers Association - Hillsborough

Jerry E. Fogarty, III

Aclarian LLC (www.aclarian.com)

Director, Suite Deployment
Tampa, FL



Profile

After spending 9 years helping run a family business, Jerry spent the next 15 years working with small businesses as a Commercial Banker and most recently as a CFO in the healthcare industry. As CFO, Jerry helped the company streamline its balance sheet and uncover untapped revenue sources. This led to a record year for the company, with revenues increasing by 170%. Jerry joined Aclarian in 2022 as a lead implementation consultant utilizing his customer service and finance experience from his years in commercial banking.

Client Experience

City of Fellsmere
Hillsborough Tax Collector
City of Lake Helen

Osceola Tax Collector
Tampa Bay Water
Manatee County

Education

- Bachelor of Science, University of Florida, Gainesville, FL

Professional Development

- Raymond James University
- Richardson Sales Performance Training Company
- St. Meyer & Hubbard

Jordan Romager, MS

Aclarian LLC (www.aclarian.com)

Director, Quality Assurance



Profile

Jordan comes from a project/grant and customer service management background with 8 years of program leadership, customer service, research/design, and statistical analysis software experience. Working in social services management for 5 years, Jordan gained extensive knowledge of both the back and front end of social service and government organization management, with a high focus on financial management and program improvement initiatives utilizing software solutions. She has served as a Program Manager with multiple companies and successfully implemented new processes and technologies to improve outcomes. Jordan joined the Aclarian team in 2022 to lead Quality Assurance efforts and bring program management and research methodology/design expertise to software implementations and development.

Client Experience

City of Fellsmere
Hillsborough Tax Collector
City of Lake Helen

Osceola Tax Collector
Tampa Bay Water
Manatee County

Education

- Master of Science, *Western Washington University*, 2019
- Bachelor of Arts, *Illinois State University*, 2016

Professional Development

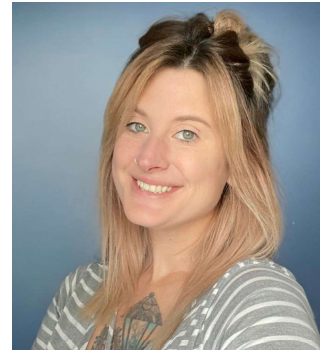
- Program Manager, *Opportunity Council*, 2020-2022
- Program Coordinator, *Northwest Youth Services*, 2018-2020

Kacee Dozier

Aclarian LLC (www.aclarian.com)

Director, Applications

Tampa, FL



Profile

Kacee comes from a service management background with over 10 years of quality assurance and customer service experience. Working in account management for the last 8 years, Kacee has an extensive knowledge of both the back and front end of software systems, with a high focus on Human Resource and Payroll Management. She has served as an Account Manager with multiple companies with a variety of different backgrounds and needs. Kacee joined the Aclarian team in 2023 for Quality Assurance and ERP Software Progression.

Client Experience

City of Fellsmere

Hillsborough Tax Collector

City of Lake Helen

Osceola Tax Collector

Tampa Bay Water

Manatee County

Education

- Associate's Degree, The Art Institute of Tampa, Tampa, FL

Professional Development

- Aramark, Account Manager, 2014-2019
- Compass Group, Account Manager, 2019-2023

Jonathas Sucupira

Aclarian LLC (www.aclarian.com)

Vice President, Technology
Houston, TX



Profile

Over 15 years of experience working with legacy and bleeding-edge technologies, including leveraging big data, mobile architectures, customer engagement, and enterprise-scale software implementations (SAP, Microsoft Dynamics, and Salesforce). Jonathas joined Aclarian at inception, leading the efforts to design and build a highly scalable ERP system.

Jonathas is highly valued for his ability to create strategies and processes to ensure enterprise-wide collaboration and that technology drives operating efficiency. He has recruited, motivated, and mentored a high-performance global team of developers.

Client Experience

City of Fellsmere
Hillsborough Tax Collector
Glades County
City of Moore Haven
City of Lake Helen

Osceola Tax Collector
Tampa Bay Water
City of Madeira Beach
Orlando MetroPlan
Manatee County

Education

Bachelor of Science, Florida State University, Tallahassee, FL

Professional Development

Wonderdev, LLC
Go Innovations LLC
Steady
Toptal
CDE INC
Bloomin' Brands

Founder and Principal Architect
Chief Technology Officer
Senior Consultant
Senior Consultant
Consultant
Solutions Architect

Harrison Hogan

Aclarian LLC (www.aclarian.com)

Dallas, TX
Manager, Southwest Territory



Profile

Dedicated and results-driven professional with a Bachelor of Science in Integrated Marketing & Communications from the University of Mississippi. Proven expertise in the technical industry with experience as a National Technical Recruiter at Signature Consultants and subsequently as a Government Technical Recruiter at Tech Valley Talent.

Recently transitioned into the role of Sales Manager at Aclarian LLC in November 2023, demonstrating adaptability and a keen ability to excel in dynamic environments. Adept at leveraging a background in marketing and communications to drive sales strategies and foster lasting client relationships. Committed to delivering innovative solutions and achieving business objectives through effective leadership and collaboration.

Education

- Bachelor of Science, *University of Mississippi*, 2020

Professional Development

- Government Technical Recruiter, *Tech Valley Talent*, 2022-2023
- National Technical Recruiter, *Signature Consultants*, 2021-2022

Completed Projects

Client	Year	ERP	Total Budget (\$)	Population
City of Madeira Beach, FL	2021	Full	39.5M	3,880
Hillsborough County Tax Collector	2023	Full	40.5M	1,478,000
MetroPlan Orlando	2023	Full	170.2M	317,800
City of Fellsmere, FL	2023	Full	37.5M	4,916
City of Lake Helen, FL	2023	Full	4.6M	2,863
Glades County, FL	2023	Full	52.6M	12,130
Osceola County, FL	2023	Full	1.9B	388,660
City of Moore Haven, FL	2022	Full	4M	1,600
Manatee County, FL	2023	Lease Accounting	2.1B	399,710

Client References

Proposer name:	Aclarian LLC
Customer name:	Hillsborough County Tax Collector
Available for a site visit?	Yes
Customer contact:	Justyna Swiebocki
Customer phone number:	[REDACTED]
Customer E-mail address	[REDACTED]
System which Solution Replaced	Great Plains
Describe Nature of Project and Services Provided to This Client:	
Full ERP implementation and integration with Grant Street Group software for tax collection. Custom forms and reporting.	
Configuration of Solution Implemented (Hardware, Software):	
Web-based and cloud-based solution.	

Proposer name:	Aclarian LLC
Customer name:	Osceola County
Available for a site visit?	Yes
Customer contact:	Irina Timmerman
Customer phone number:	[REDACTED]
Customer E-mail address	[REDACTED]
System which Solution Replaced	Tyler
Describe Nature of Project and Services Provided to This Client:	
Full ERP and custom reporting with web portals.	
Configuration of Solution Implemented (Hardware, Software):	
Web-based and cloud-based solution.	

Proposer name:	Aclarian LLC
Customer name:	Brevard County Tax Collector
Available for a site visit?	Yes
Customer contact:	Cindy Speece
Customer phone number:	[REDACTED]
Customer E-mail address	[REDACTED]
System which Solution Replaced	Tyler
Describe Nature of Project and Services Provided to This Client:	
Full ERP and financial reporting.	
Configuration of Solution Implemented (Hardware, Software):	
Web-based and cloud-based solution.	

Proposer name:	Aclarian LLC
Customer name:	Glades County
Available for a site visit?	Yes
Customer contact:	Tasha Morgan
Customer phone number:	[REDACTED]
Customer E-mail address	[REDACTED]
System which Solution Replaced	Great Plains
Describe Nature of Project and Services Provided to This Client:	
Full ERP and financial reporting.	
Configuration of Solution Implemented (Hardware, Software):	
Web-based and cloud-based solution.	

Proposer name:	Aclarian LLC
Customer name:	City of Madeira Beach
Available for a site visit?	Yes
Customer contact:	Patrick Cade
Customer phone number:	[REDACTED]
Customer E-mail address	[REDACTED]
System which Solution Replaced	Tyler
Describe Nature of Project and Services Provided to This Client:	
Full ERP and custom reporting with web portals.	
Configuration of Solution Implemented (Hardware, Software):	
Web-based and cloud-based solution.	

Sample Software Agreement

Aclarian Software License Agreement

This Software License Agreement (“Agreement”) is made and entered into on this XX day of MONTH, YEAR (“Effective Date”), between Aclarian LLC, a Florida limited liability company (“Licensor”), and SAMPLE ENTITY (“Licensee”). Either party may be referred to individually as the “Party” or collectively as “the Parties.”

WHEREAS:

Licensor owns all right, title, and interest in the Software (as defined below); and Licensee desires a license to use the Software.

NOW, THEREFORE:

The Parties have agreed to the following terms and conditions:

I. Definitions. Terms used in this Agreement have the following meaning:

- a. “Proprietary Information” shall be defined as all proprietary or non-public information owned or created by Licensor, including the Software, and any know-how, trade secrets, data, materials, inventions, copyrights, trademarks, or discoveries that are necessary or substantially related to the Software.
- b. “Software” shall be defined as the accounting program known as “Aclarian,” and any software products related thereto provided by its affiliated subcontractors or third-party vendors, including but not limited to human resources and payroll related software, as well as any technical information or documentation relating thereto.

II. Grant of License.

a. **Scope of License.** Licensor grants to Licensee a non-exclusive, limited license to use the Software solely for the internal business purposes of employees of Licensee that are involved in the accounting, financials, and operations of Licensee. Licensee’s rights in the Software shall be limited to those expressly granted in this Agreement. Licensee shall not distribute, rent, resell, lease, sublicense, or otherwise disclose or transfer the Software to any third party (including but not limited to competitive businesses) without Licensor’s express written consent, and subject to additional license fees. Licensee shall not modify, reverse engineer, decompile, or create derivative works of the Software. Any use which exceeds the scope of the license grant shall constitute a breach of this Agreement, and shall be subject to emergency injunctive relief and the payment of any related attorneys’ fees and court costs incurred by Licensor. Licensor acknowledges that Licensee shall be the sole and exclusive owner of the financial, accounting and customer information input into the Software for Licensee’s use.

b. **Maintenance and Support.** For the duration of this Agreement, Licensor will provide, at no charge to Licensee, maintenance and support. Maintenance refers to modifications, such as patches, corrections, and updates, as needed to ensure the software is functioning as intended. With regard to Support, Licensor shall use commercially reasonable efforts, commensurate with the severity level, to achieve its support response and resolution targets with respect to resolving errors. An error is defined as a verifiable and reproducible failure of the Licensor’s software product to operate as intended under normal use, and where the error is directly attributable to the Licensor’s software product as updated with current modifications. Support is available through the interactive “Help” feature within the Licensor’s software.

Support does not include implementation of the Licensor’s standard software product, onsite or remote training, or development and installation of custom enhancements specifically requested by the

Licensee in addition to the standard software product. Pricing for implementation services, onsite and remote training, and custom enhancements is disclosed in Exhibit A

III. Term and Termination.

a. Term. The Licensee's use of the software shall commence as of the Effective Date and shall automatically renew on the one (1) year anniversary of the Effective Date, and on the anniversary of the Effective Date each year thereafter, for subsequent one (1) year term(s); *provided, however* that Licenser or Licensee may provide written notice of termination at least sixty (60) days prior to the anniversary of the Effective Date, with such termination effective on the anniversary of the Effective Date.

b. Licenser may increase the Fees pursuant to this Agreement by providing at least sixty (60) days' written notice to Licensee. In that event, Licensee may provide written notice of termination of this Agreement within sixty (60) days thereafter, prorated for any partial month, as applicable. If no such termination right is exercised within sixty (60) days, the Fees increase is deemed accepted by Licensee. Licenser shall not refund or prorate the Fees if Licensee earlier terminates this Agreement for any reason other than an increase in Fees.

c. Upon termination, Licenser shall disable Licensee's account on the Licenser's web-based software application.

IV. Payment.

a. In exchange for the grant of license to use the Software as outlined herein, Licensee agrees to pay the license fees and implementation costs ("Fees") outlined on attached Exhibit A. Additional costs pertaining to implementation, training, and customization services are also included in Exhibit A. Implementation shall not begin until payment for implementation services is received in full if Licensee elects the fixed fee option for implementation.

V. Data Security and Privacy.

a. In the course of providing the Software and related services under this Agreement, Licenser will employ information security and physical security safeguards, procedures and practices to protect the privacy and security of Licensee's data that Licenser receives, accesses, uses, creates, or discloses. Such safeguards shall be at least equal to industry standards and be reasonably appropriate to protect against accidental or unlawful destruction, loss, alteration or unauthorized third party disclosure or access of Licensee's data. Licenser shall make a good faith effort to detect, respond to, and mitigate data security incidents, and to notify Licensee of any such incidents involving Licensee's data as soon as reasonably practicable and in accordance with applicable laws.

VI. General.

a. Modifications and Additions. No modifications or additions to the terms and conditions of this Agreement shall be binding unless in writing and acknowledged by both Parties.

b. Limitation of Liability. Licenser's total cumulative liability to Licensee from all causes of action and under all theories of liability will be limited to and will not exceed the total amount of the fees paid pursuant to this Agreement.

c. Assignment. Either Party may transfer and assign this Agreement to a successor entity or assignee in the event of the purchase of all or substantially all of the assets or ownership interests of the Party. Written notice shall be provided to the other Party in the event of a sale or merger.

d. Notices. All notices provided in connection with this Agreement will be in writing, and will be delivered by (i) certified or registered mail, postage prepaid and return receipt requested or (ii) courier and will be deemed effective upon receipt at the address set forth above, or (iii) by e-mail with return receipt requested.

To Licensee:

ENTITY NAME, Attn: Contact Name

ENTITY ADDRESS

ENTITY EMAIL

To Licensor:

Aclarian LLC, Attn: Andrew Laflin

4240 W Morrison Ave, Tampa, FL 33629

e. IN WITNESS WHEREOF, each of the Parties have caused its duly authorized representatives to execute this Agreement as of the date below.

Licensor

Licensee

Name: Andrew Laflin

Title: President

Date: _____

Name: Contact Name

Title: Contact Title

Date: _____

APPENDIXES

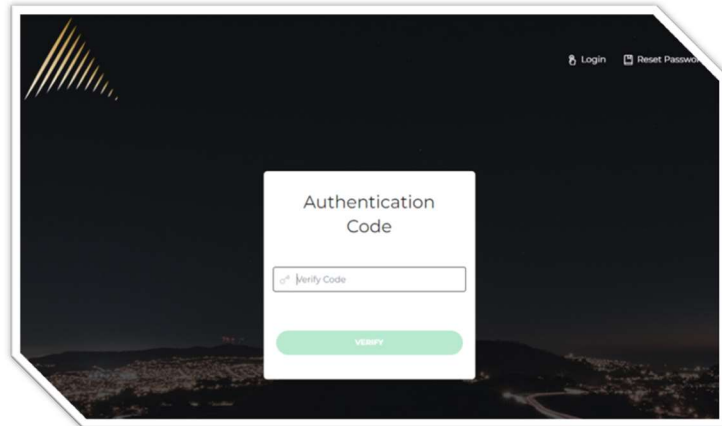
Appendix A - Aclarian Software Screenshots

System Access Controls

Accessibility – Installed product versus web-based product

Security Controls at Login:

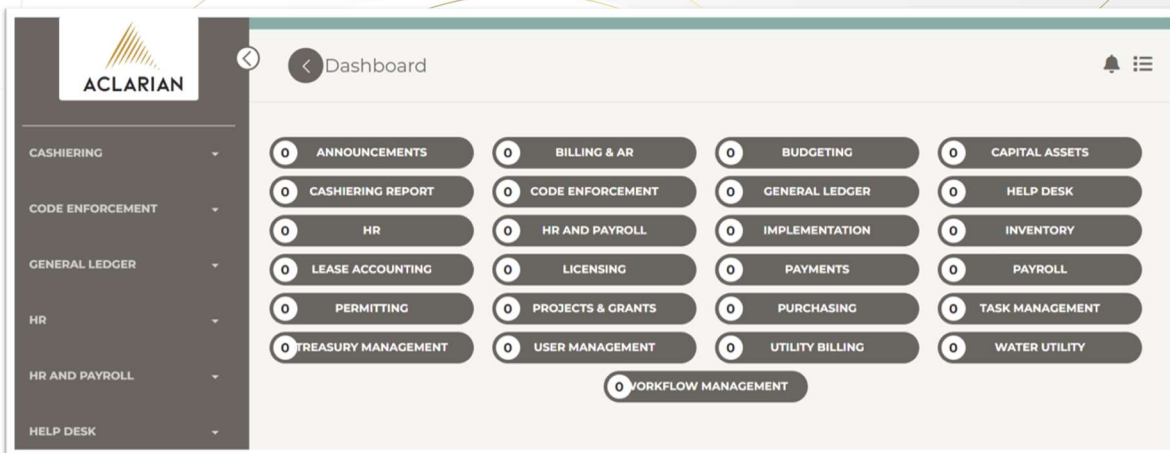
- Establish minimum password length
- Set days to password expiration
- Enable Multi-Factor Authentication
- Single Sign-on (SSO) option



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General Navigation - Dashboard

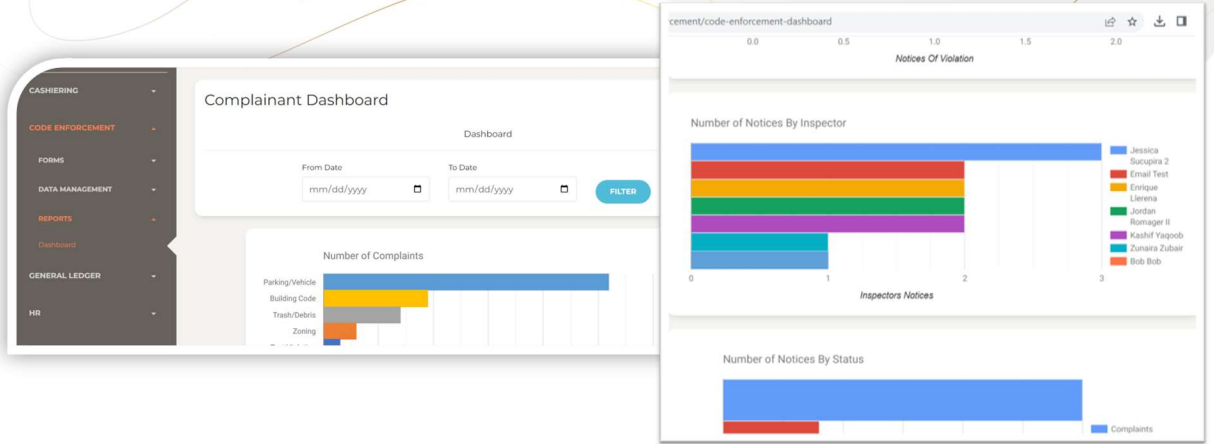
Dashboard view – Review all items awaiting your approval.



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Dashboard View – Charts & Graphs

Charts & graphs to actively monitor items in realtime.



User Management – Dashboard Preferences

Allows users to determine what charts, graphs, tables, and other summarized data they want presented on their individual dashboards

The screenshot shows a 'Dashboard Preferences' form with four checked items, each with an 'Include' button and a dropdown menu:

- Departmental Percentage Spend by Account Pie Chart
Include: Finance
- Departmental Budget Vs Actual By Account
Include: Finance
- Departmental Total Vs Used By Purchase Order
Include: Legal Services, Finance
- Budget Vs Actual Summary By Department
Include: City Manager, Information Technology, Legal Services, Human Resource...

A 'SAVE' button is located at the bottom left of the form.



Reporting Capabilities

Reporting Wish List

- User interactivity – determine columns to include/exclude and filter data
- Easily can export to Excel
- Ability to drill down into transaction data
- Save grid layout for future use

Complainant Listing

SAVE GRID LAYOUT EXPORT

Action	Case # ↑	Status	Name	User Defined ...	User Defined ...
VIEW FORM	1				
VIEW FORM	2	In Review	Ut dignissimos bland	Quas veniam ut quo	West
VIEW FORM	3		Ratione suscipit eni		
VIEW FORM	4	Closed	Griffin		North
VIEW FORM	5	Open			East
VIEW FORM	6		test		
VIEW FORM	7	Closed			West
VIEW FORM	8		Quos laudantium rep		



User Management – Roles and Access

User Access Considerations

- Ability to initiate new transactions
- Ability to view transactions
- Ability to update records
- Ability to review reporting data

Copy roles from another user?

Yes No

Use template from custom roles?

Yes No

Items Dashboard Preferences Roles

ANNOUNCEMENTS

Forms

Announcements

Visible Edit Form Form Search - All Forms Skip Approver

CODE ENFORCEMENT

Forms Data Management Reports

Complainant Listing

Visible Edit

Violation Type Management

Visible Edit

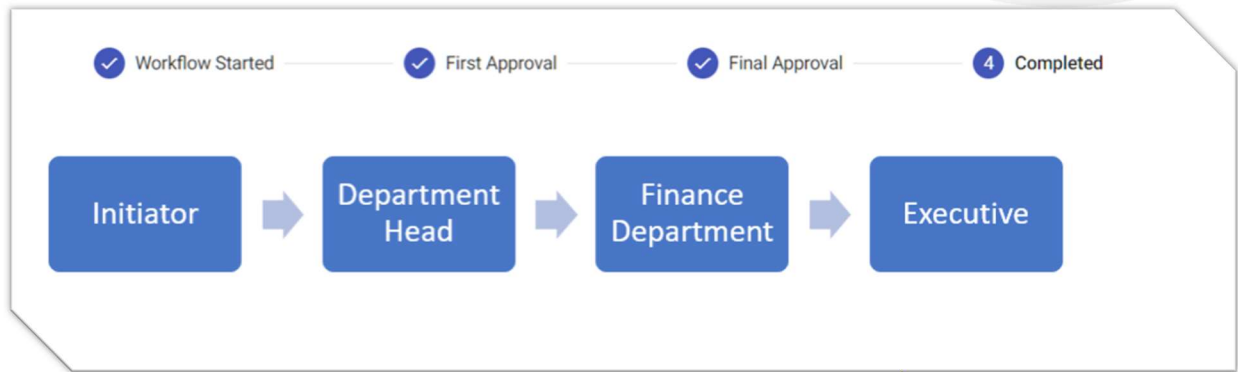
Code Enforcement Configuration

Visible Edit



Workflow

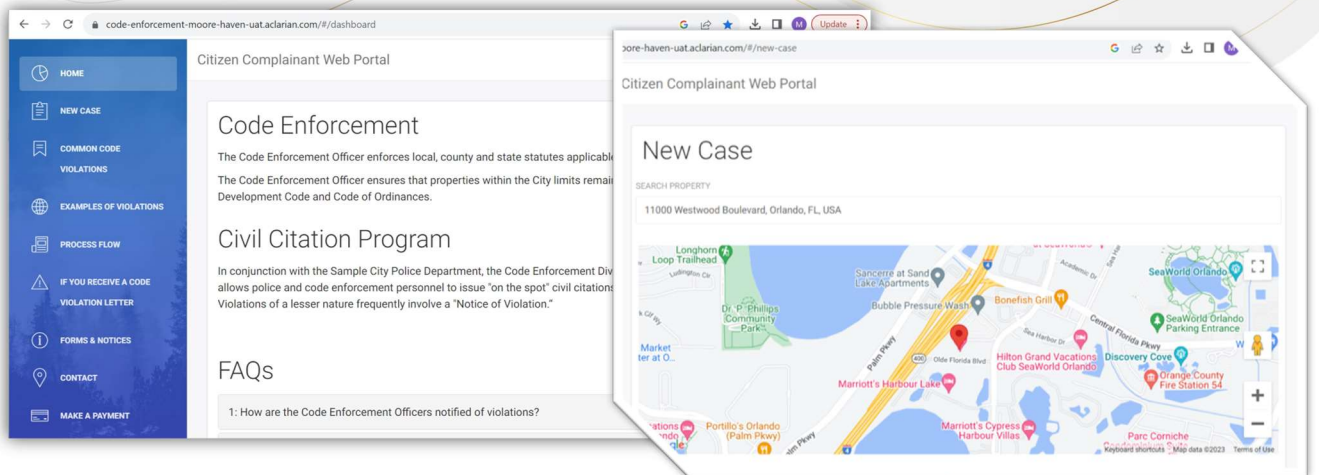
- Flexibility to set up workflow by individual, department head, group, threshold approver, fund, project ID, grant ID, vendor ID, purchase order number, and more.
- Designate temporary substitute approvers.



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Citizen Web Portal – Code Enforcement

Allow complainants to submit violations directly into your local government system.



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Configuration

Establish relevant User Defined configurations: i.e.,

- Violation Types
- Law Enforcement Number
- Geographic Zones

The image shows two screenshots of the ACLARIAN configuration interface. The top screenshot is titled "Configuration" and shows a sidebar with menu items: CASHIERING, CODE ENFORCEMENT, FORMS, DATA MANAGEMENT, Code Enforcement Configuration, Complaint Listing, and Violation Type Management. The main content area is titled "Customizable Dropdown Option Management" and features a table with columns for Name, Description, and Action. The table contains three rows: 1. North, 2. South, and East. A red circle highlights the "ADD NEW OPTION" button, and a red arrow points to the "SAVE CHANGES" button. The bottom screenshot is titled "Violation Types" and shows a table with columns for VIOLATION TYPE, CODE ORDINANCE, DESCRIPTION, ACTIVE, and ACTION. It lists three violation types: "Keeping of Livestock or Fowl Prohibited", "Lot Cleaning & Property Maintenance", and "Front, side, and rear yard landscaping shall be maintained in accordance with the City's standard at the time". A red arrow points to the "ADD NEW" button.

Simply "Add New Option" and "Save Changes".



The image displays four screenshots of the "Personnel Detail Report" interface. The top screenshot shows the report title and a table of personnel details with columns for Name, Title, Department, and Subunit (Yes/No). The middle-left screenshot shows a table with columns for Allocation %, Total Hours, Pay Rate, and Special Pay. The middle-right screenshot shows a table with columns for COLA %, Retirement Type, Group Insurance Type, and Workers' Comp Rate. The bottom-right screenshot shows a summary table with columns for Retirement Amount, Group Insurance Amount, and Workers' Comp, along with a list of items like Search, Wages, Total Wages, Retirement Amount, Group Insurance Amount, Workers' Comp Amount, and FTE.

Budget Balance Management

[+ IMPORT BUDGET](#)
[+ NEW BUDGET](#)

Fiscal Year: 2023

Fund	Account ↑	Account Description	Original Budget	Revis
General Fund	001.1000.366000	Donations	\$0	\$2,
General Fund	001.1000.369900	Other Miscellaneous Rev...	\$0	\$2,
General Fund	001.1000.512000	Salaries & Wages	\$254,261	\$2!
General Fund	001.1000.514000	Overtime	\$0	\$0
General Fund	001.1000.521000	Social Security	\$19,451	\$1!
General Fund	001.1000.522001	ICMA 401(a) Plan	\$27,136	\$2'
General Fund	001.1000.523000	Group Insurance	\$34,050	\$3.
General Fund	001.1000.523003	Group Insurance - Depe...	\$10,000	\$1!

Monthly Budget Forecasting

[+ IMPORT BUDGET](#)
[+ NEW BUDGET](#)

Fiscal Year: 2024

Monthly Actual Forecast October	Monthly Actual Forecast Nove...	Monthly Actual Forecast Decem...	Mont
\$0	\$0	\$0	\$0
\$2,969.25	\$2,969.25	\$2,969.25	\$2,
\$0	\$0	\$0	\$0
\$0	\$0	\$0	\$0
\$5,938.51	\$5,938.51	\$5,938.51	\$5,
\$0	\$0	\$0	\$0
\$0	\$0	\$0	\$0

Import GL Accounts

Upload File

No file chosen

Follow this Sample

	A	B	C	D
1	Account	Debit	Credit	Comment
2	110 0000 104000		11	Comment 1
3	110 0000 104000		11	Comment 2
4	110 0010 012000		22	Comment 3
5	110 0010 522001		22	Comment 4

Bank Reconciliation Form

Year

2023

Month

October

ADJUSTED BANK BALANCE

Unadjusted Bank Balance

\$ 0.00

Ref #	Description	Amount	Date
0	REMOTE DEP...	\$17,240.80	10/12/2022
	CORP PAY ...	-\$599,679.00	10/06/2022
	V MC PYMT ...	-\$38,689.49	10/25/2022
	GLOBAL DEP...	\$376.12	10/03/2022

ADJUSTED GL BALANCE

Unadjusted GL Balance

\$21,795,728.47

Check #	JE #	Description	Amount	Effective Date
1620	50691	AP Invoice...	-\$412.50	10/05/2022
6551	50694	AP Invoice...	-\$2,802.50	10/05/2022
1508	50772	Check Requ...	-\$208.63	10/05/2022
6528	50777	Check Requ...	-\$1,566.00	10/05/2022

Project & Grant Close Form

Requested By:

Is It Project or Grant?:

Need to Close:


Select:

Closing Date:

Closing Reason:

Create An Asset?:

Assign Asset Form Completion:


 Drag and drop files here

Tuition Reimbursement Payment

Employees:

Tuition Form:

Date:

COURSE TITLE	TUITION FEE	BOOK COSTS	DESCRIPTION
TUITION FEES			<input type="text"/>
BOOK COSTS			<input type="text"/>
TOTAL AMOUNT:			<input type="text"/>

UPLOAD SUPPORTING DOCUMENTATION HERE

File 1:

ADD ATTACHMENT

Appendix B - Aclarian Module Descriptions



ACLARIAN MODULE DESCRIPTIONS

Module Name	Major Processes	Included Features
Announcements		Send a private message to a single user or an announcement to an entire department or all users within the entity using the Announcements from. Notifications of new unread announcements are clearly identified through an icon in the top right corner of the Aclarian portal. The Announcements module is an effective means for individuals to communicate important messages to other users within the organization in a secure manner.
Billing & A/R		Create invoices on customized template with client logo. 'Email Invoice' option automatically sends invoices and reminders to customers via email. Create an online billing and payment web portal for customers to make payments online. Includes automatic GL entries for invoice creation and payments made online.
Budgeting		Establish relevant budget configurations, such as entity-wide pay increases (COLA), retirement percentages, health insurance costs per employee, etc. Personnel costs are automatically calculated based on employee data inputs. Customized reporting can be export to PDF, Word, or Excel and used for creating the annual budget document for adoption.
Capital Assets		Perform inventories and scan equipment, vehicles, etc. containing bar codes using a cell phone or tablet. Maintain a picture of the scanned item with record of scan history. Within capital outlay reporting, associate capital asset additions with capital outlay entries and easily identify potentially unrecorded assets. Attach and store equipment and vehicle registration information and repair and maintenance documentation within individual asset records in Aclarian's Asset Management for well-organized status tracking.
Central Cashiering		All customer collections from various billing sources logged in the Central Cashiering module and segregated by user (cashier), which as a strong internal control measure, allows for reliable reconciliation and close out procedures by each cashier. Allows for batching by transaction type, namely cash, checks, credit card, and ACH payments, to maximize efficiency in bank reconciliation procedures.
Code Enforcement		Aclarian's code enforcement module allows users to create and manage cases, assign case officers, track progress, and set deadlines for compliance. As a mobile-friendly module, code enforcement officers can access data, capture evidence, and report violations directly from their smartphones or tablets. For violations that require fines or fees, Aclarian's integrated payment processing feature simplifies the collection process, allowing violators to pay fines directly online through an integrated web portal.
Custom Reporting		Generate schedules, tables, and statements based on general ledger balances and data from Budgeting, Capital Assets, and other modules as needed that can be used to effortlessly create sections of the Annual Comprehensive Financial Report (ACFR), budget book, or other financial reporting deliverables as requested by stakeholders, including creditors, elected officials, and senior management.
General Ledger	Chart of Accounts, Fund, Department, Account, Project/Grants, Crosswalks, Historical Data Conversion and Reporting	Aclarian's journal entry form includes Excel import option for journal entry line items, and schedule recurring entries with automatic reminders to the assigned user. Aclarian's reporting tool, AG Grid, is a fully-featured and highly customizable JavaScript data grid. It allows for custom filtering, customizable appearance, data export to CSV or Excel, grouping/aggregation, and has a look and feel that is almost identical to data filtering and producing pivot tables in Excel for the trial balance, balance sheet, revenues & expenses report, budget versus actual report, and GL detail transaction report.



ACLARIAN MODULE DESCRIPTIONS, CONTINUED

Module Name	Included Features
Human Resources	<p>Post and receive job applications online. Make annual benefit elections or changes to existing elections due to qualifying events. Easily manage employee status changes, such as departmental transfers, position changes with pay increases, leave of absences, and more. Complete custom-designed performance evaluation forms for employees...all of which send notifications via email and dashboard and go through workflow approval.</p>
Implementation	<p>Make the ERP software implementation more streamlined and organized through the implementation module, which consists of a standard form for each module to be implemented. Each implementation form consists of a series of questions and data requests which will provide the Aclarian development team sufficient information to prepare the module according to each client's exact specifications. The implementation forms also provide a secure means to transmit data files needed in the data conversion process.</p>
Integrations	<p>The Aclarian Integrations module will display the status of file transfers from external software applications that interface automatically with the Aclarian ERP system typically through API call or SFTP upload. This module can also store additional data from other applications and provide reporting using AG Grid in accordance with user specifications.</p>
Inventory	<p>Scan items in and out of inventory using a QR Code. Manage pricing and quantity for each inventory item and easily generate reports that can be exported to Excel displaying balances and activity by item.</p>
Lease Accounting	<p>The New Capital Lease Form is an intuitive, easy to use form that, when completed, will generate a capital lease record under GASB 87 or 96. Aclarian's library of reports includes all information needed to efficiently record journal entries each period based on the accumulation of all activity from each individual lease, as well as capture and report all necessary disclosure information derived from each Capital Lease Form and summarized within the report.</p>
Payments	<p>Scan receipts and record itemized transactions in the purchasing/credit card form. Instruct vendors to submit invoices online via a custom-built online Vendor Portal, and the invoice information entered automatically creates an Invoice Approval Form (including attachments). Aclarian's Auto-Pay payment processing service automatically sends vendor payments via mailed check or via electronic ACH, as well as automatically transmit a Positive Pay file to the client's banking institution.</p>
Payroll	<p>Employees can enter time via an easily accessible time clock that starts and stops with a single button click and can be affixed at a client location. Employees can request time off using a form with workflow approval, which automatically logs the even on the employee's timesheet. Tracking time, managing personal time off, and processing payroll has never been so easy.</p>
Permitting	<p>Aclarian's permitting module enhances efficiency, accuracy, and compliance while simplifying the overall permitting workflow. Applicants can submit permit requests online, and automated workflows and notifications route applications to the appropriate users for review and approval. Applicants and stakeholders can track the status of permit applications in real-time via Aclarian's permitting web portal. Automated notifications can inform applicants of the progress and approval status, reducing the need for manual follow-ups.</p>
Projects & Grants	<p>Track project and grant activity using assigned project and grant numbers that will be included in the GL string. Easily track revenues and expenses by project and grant through integration with the general ledger. Dictate notes and respond to comments regarding project status within Project/Grant Management; add sub-tasks and close projects and grants through simple form creation. Also included is project burdening via integration with Aclarian Payroll timesheet as projects and grants are created, allowing employees to charge time to applicable projects and grants as applicable.</p>



ACLARIAN MODULE DESCRIPTIONS, CONTINUED

Module Name	Major Processes / Forms	Included Features
Purchasing	Purchasing Methodology, Purchase Requisition, Change Order, Bid Form, Vendor Management and Reporting	Purchase Requisition Forms can be customized according to a specific procurement policy (form can require documentation of written bids, quotes, or other documentation for sole source or emergency purchases, etc.). Enable vendors to register to do business with the entity online via a link to the entity's website, which will automatically populate a New Vendor Form. Allow for workflow approval of bids and contracts and manage contract status (such as upcoming expiring contracts and insurance requirements) through Contract Management.
Task Management		Employees can manage tasks ranging from the Finance team preparing for the year end audit to the Public Works and Utilities departments establishing and assigning work orders using custom developed forms to assign to individuals and approvers via workflow. Work Order Forms include Google Maps and Google Earth views when entering property addresses.
Templates		Create templates for recurring tasks and save as well as edit in the future or even delete if needed. Common templates include journal entries, cash receipts, payment requests, and more. Once created, the template will be included in the template list within the applicable form and can be selected as needed.
Treasury Management	Investments, Debt, and Bank Reconciliation	Perform bank reconciliations efficiently within Aclarian's Treasury Management module. Either manually Import transaction files from the bank, or Aclarian can automatically receive daily BAI2 or CSV files directly from the bank containing deposit and withdrawal transactions. Amounts per bank and per GL with matching check numbers, amounts, or other possible unique identifiers will automatically be matched. Complete monthly bank reconciliation forms based on transaction matching results within the Bank & GL Transaction listing.
Training		Watch a multitude of instructional videos from Aclarian's vast training library that typically range from two to ten minutes in length. Training videos are available for all modules and provide demonstrations with explanation on how to complete forms, manage data records, and generate reports within a module. All training videos are organized by module.
User Management		Authorized employees can manage access for users by restricting the modules, forms, data management items, and reports that each user can access. Allow certain users to skip approvers, edit forms currently in workflow approval, and view all forms for a particular form section within Form Search.
Utility Billing		Manage and streamline the billing processes for utilities such as water, electricity, gas, and other services within a single platform. Aclarian utility billing supports automated meter reading (AMR) or smart meter integration to capture accurate and real-time consumption data. It includes a customer portal allowing customers to view invoice and consumption history, offers various online payment options, and provides auto-notify options to customers to receive notifications via email, text, and/or automated voice call. And Aclarian's print/mail and lockbox features provide utilities with an outsourced alternative to mail invoices to customers and collect and record mailed payments to a dedicated lockbox.
Workflow Management		Set workflow approvers and sequence (first approval, second approval, third approval, etc.) for any form within any module in the system. Also, create workflow groups (such as Capital Assets Approvals Group or Accounts Payable Processing Group) and determine the number of approvals required as a workflow step for each created workflow group. Set thresholds for approvals within a workflow group, define project managers within the Projects & Grants module, and more.