



## September 2012 Release

Thank you for attending. Today's webinar will be recorded and available for replay.



Pay Bills Usability Enhancements

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# PAYABLES

# Pay Bills Usability Enhancements

## What is it?

- Changes in the options on the Pay Bills page.
- Changes in default page for the “Payer” role.

## Who’s it for?

- For you/your clients who pay bills/record payments in Bill.com

## Why?

- Reduce confusion for you/your clients
- Clarify the different options available when paying outside of Bill.com

# Pay Bills Usability Enhancements

The screenshot shows the Bill.com interface for paying bills. At the top, there are navigation tabs: Home, Inbox, Payables, Receivables, Documents, and Reports. The user is logged in as Vijay Raghuraman at BlueLeaf Consulting. The main navigation bar includes Overview, My Bills, All Bills, Pay Bills (highlighted), View Payments, Vendors, and Manage Recurring. Below this, there are filters for Approval Status (Approved) and Due Date, along with a 'Go' button and a 'Sort By Vendor Name' dropdown. The main content area is titled 'Partially paid bills' and contains a table with the following data:

Bill Information	Due Date	Approval Status	Bill Amount	Previous Payments	Payment Amount	Process Date	Mark As	Select
Blue Apple Design Credits: \$77,123.23 avail. Apply	01/31/12	Approved	\$100.00	\$40.00	\$0.00	08/28/12	Paid	<input type="checkbox"/>

Below the table, there are summary statistics: 'Total Due: \$0.00' and 'Total Selected: \$0.00'. A section titled 'Pay without using Bill.com' offers two options: 'Print check(s) in Peachtree' and 'Mark as already paid'. A 'Next' button is located at the bottom of this section. At the very bottom, a question asks: 'What will my vendors receive? Can I still print checks?'.

Moved the buttons to the center of the page

Clear separation of pay via Bill.com and pay outside of Bill.com

Separated out options for Print check, and Mark as Paid

# Pay Bills Usability Enhancements

The screenshot shows the Bill.com interface for the 'Pay Bills' section. The user is logged in as 'Vijay R912' and is viewing a bill from 'BlueLeaf Consulting (Peachtree...)'. The bill is for \$100.00, with \$40.00 in previous payments and a remaining balance of \$0.00. The bill is marked as 'Paid' on 08/28/12. A dialog box is displayed, informing the user that they are not authorized to pay via Bill.com. The dialog offers two options: 'Pay via Bill.com' (with a 'Pay' button) and 'Pay without using Bill.com' (with radio buttons for 'Print check(s) in Peachtree' and 'Mark as already paid'). A 'Next' button is also present.

Bill.com™ Home Payables Receivables Documents Reports Vijay R912 BlueLeaf Consulting (Peachtree...)

Overview All Bills Pay Bills View Payments Vendors Manage Recurring

Approval Status: Approved Due Date: [ ] to [ ] Go Sort By Due Date

Partially paid bills Select: [ All | None ]

Bill Information	Due Date	Approval Status	Bill Amount	Previous Payments	Payment Amount	Process Date	Mark As	Select
Blue Apple Design Credits: \$77,123.23 avail. Apply	01/31/12	Approved	\$100.00	\$40.00	\$0.00	08/28/12	Paid	<input type="checkbox"/>

inv # - 2005 alert! Check - Arrives by 08/31/12

Total Due: \$0.00 Total Selected: \$0.00

**You are not authorized to pay via Bill.com. Why?**

Pay via Bill.com

Pay without using Bill.com

Print check(s) in Peachtree  
 Mark as already paid

Can I still print checks?

If user is not authorized for Bill.com payments, then clearly indicated on the Pay Bills page

# Pay Bills Usability Enhancements

Bill.com™ Home Payables Receivables Documents Reports Accounting Clerk  
FixIT Consulting

Overview All Bills **Pay Bills** View Payments Vendors Manage Recurring

Approval Status Any : Due Date 12/01/08 to 12/31/08 Go Sort By Due Date

Unpaid bills Select: [ All | None ]

Bill Information	Due Date	Approval Status	Bill Amount	Payment Amount	Process Date	Select
The Demo Coach	12/10/08	Approved	\$3,210.00	\$3,210.00	01/02/09	<input type="checkbox"/>

inv # - 10001 view bill notes Check - Arrives by 01/09/09

Total Due: \$3,210.00 Total Selected: \$0.00

Common Questions

- What will my vendors receive?
- Can I still print checks?

Update bills for another user to pay later  
 Record as Paid or Print in QuickBooks Save

Removing option to “Update bills for another user to pay later”

# Pay Bills Usability Enhancements

The screenshot shows the Bill.com Payables interface. The top navigation bar includes 'Home', 'Payables', 'Receivables', 'Documents', and 'Reports'. The user is logged in as 'Vijay R912' at 'BlueLeaf Consulting (Peachtree...)'. Below the navigation bar, there are sub-tabs: 'Overview', 'All Bills', 'Pay Bills', 'View Payments', 'Vendors', and 'Manage Recurring'. The 'Overview' tab is selected, displaying several summary tables and a search function.

**Open Bills**

Open Bills	#	Total
Overdue	7	\$24,974.00
Due in Next 7 Days	0	\$0.00
Due in 7+ Days	0	\$0.00
<b>Total</b>	<b>7</b>	<b>\$24,974.00</b>

[Create New Bill](#)

**Payments**

Payments made through Bill.com	#	Total
Next 30 Days	0	\$0.00
Next 7 Days	0	\$0.00
Today	0	\$0.00
Last 7 Days	0	\$0.00
Last 30 Days	0	\$0.00

[Pay Bills](#)

**Waiting for Approval (by days)**

Days	#	Total
0 - 5 Days	1	\$2,000.00
6 - 10 Days	1	\$200.00
> 10 Days	19	\$11,374.76
<b>Total</b>	<b>21</b>	<b>\$13,574.76</b>

**Find A Vendor**

**Waiting for Approval (by approver)**

Approver	#	Total
Darren Linscott	14	\$10,575.00
Vijay Raghuraman	7	\$2,999.76
<b>Total</b>	<b>21</b>	<b>\$13,574.76</b>

On clicking Payables tab, Payers will be taken to Overview page instead of Pay Bills (navigation standardization)



Reporting Enhancements

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# PAYABLES/RECEIVABLES



# Reporting Enhancements

## What is it?

- Make some of the reports easier to export to Excel

## Who's it for?

- For users who need access to information in Bill.com and manipulate it for analysis

## Why?

- Reduce extra work for you in getting information in the right format
- Leverage tools you already use (e.g. Excel) to format the information you need

# Reporting Enhancements

The screenshot shows the Bill.com web interface. At the top, there is a navigation bar with the Bill.com logo and menu items: Home, Inbox, Payables, Receivables, Documents, and Reports. The Reports menu is currently selected. In the top right corner, the user's name 'Vijay Raghuraman' and company 'BlueLeaf Consulting (Peachtree...)' are displayed, along with icons for help, search, and settings.

The main content area is titled 'Reports' and is divided into two sections:

- Payables Reports**: This section contains a search bar and a list of report options: Bill Payments, Unpaid Bills, Vendor Balance, Vendor Balance Detail, AP Aging Summary Report, and AP Aging Detail Report.
- Receivables Reports**: This section contains a search bar and a list of report options: Open Invoices, Customer Activity Summary, Customer Balance, Customer Balance Detail, AR Aging Summary Report, AR Aging Detail Report, Funds Transfer for ePayments Received, Funds Transfer Detail for ePayments Received, and Received Payments.

4 reports available in “Excel friendly” format

- Unpaid Bills
- Open Invoices
- Funds Transfer for Bill.com Payments
- Funds Transfer for ePayments Received

# Reporting Enhancements

Open Invoices report now includes Sales Rep so you can track how each sales rep is doing.

Open Invoices

[Download](#) [Back](#)

Customer	Invoice #	Invoice Date	Due Date	Sales Rep	Aging ▼	Open Balance
John Smith	003	08/27/12	08/10/12	PAL	33	100.00
Acme Co	005	09/04/12	08/24/12	MT	19	1500.00
John Smith	002	08/23/12	08/24/12	PAL	19	300.00
John Smith	004	09/04/12	08/26/12	PAL	17	300.00
Acme Co	006	09/04/12	09/04/12	MT	8	1650.00

# Reporting Enhancements

The screenshot shows the Bill.com web interface. The top navigation bar includes 'Home', 'Inbox', 'Payables', 'Receivables', 'Documents', and 'Reports'. The user is logged in as 'Vijay Raghuraman' at 'BlueLeaf Consulting (Peachtree...'. The main content area is titled 'Reports' and is divided into three sections: 'Payables Reports', 'Export Reports', and 'Receivables Reports'. Each section contains a list of report titles, with some items highlighted in a light grey box.

**Payables Reports**

- Bill Payments
- Unpaid Bills
- Vendor Balance
- Vendor Balance Detail
- AP Aging Summary Report
- AP Aging Detail Report
- Transaction List by Vendor
- Transaction List by Export Status
- Funds Transfer for Bill.com Payments
- Funds Transfer Detail for Bill.com Payments

**Export Reports**

- Thomson Reuters Write-up CS Summary Export
- Thomson Reuters Write-up CS Detail Export
- Accrual Summary Report
- Accrual Detail Report
- Cash Summary Report
- Cash Detail Report
- Unpaid Accrual Summary Report
- Unpaid Accrual Detail Report

**Receivables Reports**

Based on customer feedback, bill payments in scheduled status will be included in a date range with future dates is chosen in following reports:

1. Cash Detail/Summary
2. Accrual Detail/Summary
3. Unpaid Accruals Detail/Summary
4. Thomson Reuters Detail/Summary



Role/Permission Changes

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# CONSOLE

# Console Role/Permission Changes

## What is it?

- Remove some permissions for “Team Member” role


## Who’s it for?

- For console staff users

## Why?

- Based on customer feedback, for Administrative tasks to be done by “Console Admin” role.

# Console Role/Permission Changes



- First Name
- Last Name
- Email  We send instructions to this address
- Time Zone
- Console Role

Console Role: What this staff member can do in the Console

Console Activity	Console Admin	Team Member
Clients - Add Client Company	Yes	No
Features - View	Yes	No
Features - Manage	Yes	No
Billing - View	Yes	No
Billing - Manage	Yes	No
Selling - Demos	Yes	No
Selling - Tools	Yes	Yes
Selling - Directory	Yes	No
Training	Yes	Yes
Logo - Customize	Yes	No
My Staff - View	Yes	Yes
My Staff - Manage	Yes	No
Console Info - View	Yes	Yes
Console Info - Manage	Yes	No

Team Members will not get alerted when a client company is added to/removed from console

Team Members will not have access to the Features tab in the Console to turn on/off Client features (like Payables, Receivables, etc)



Profile Picture

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# PAYABLES/RECEIVABLES/CONSOLE



# Profile Picture

## What is it?

- Show your profile picture in various places in Bill.com (such as Approvals, Notes, Login page)

## Who's it for?

- All users

## Why?

- Lend a personal touch to your day-to-day use of Bill.com, especially for accountants to forge a tighter relationship with clients
- Make payables and receivables more fun!!

# Profile Picture

Home | Inbox | Payables | Receivables | Documents | Reports

Overview | Startup Checklist

My Profile

Details | Email Preferences | Login History | Tasks | Audit Trail

Change Pwd | Edit

**Sarah Lee**  
plam5@hq.bill.com

Upload a Picture  
Or use your Facebook  
profile picture

**Authorized Funding Methods** Bank  
**External Accountant?** Yes  
**Time Zone** Pacific Time (GMT-8)  
**Role** Administrator

Upload your picture  
or use your Facebook  
profile picture!

# Profile Picture

The screenshot displays the Bill.com web application interface. At the top, the navigation bar includes 'Home', 'Inbox', 'Payables', 'Receivables', 'Documents', and 'Reports'. The user is logged in as Kathleen Long at BlueLeaf Consulting. The main content area shows an invoice for 'Blue Apple Design - 3001A'. A 'Notes' section contains two entries from Kathleen Long, dated 08/27/12. Below the notes is a 'Summary' section with a 'Documents' tab selected. The summary table shows a total amount of \$2,000.00. A 'Client' section lists 'FixIT C' and 'Joanna'. An 'Approvers' section shows two approval messages: one from Darren Linscott (Sent) and one from Kathleen Long (New - notes). The total amount is listed as \$2,940.00.

Bill.com™ Home Inbox Payables Receivables Documents Reports Kathleen Long BlueLeaf Consulting (Peachtree...)

Overview My Bills All Bills Pay Bills View Payments Vendors Manage Recurring

Blue Apple Design - 3001A

Notes view all ✕

Kathleen Long I think this is for the July invoice..let me check with Nora. I will get back by August 27, Monday..  
08/27/12 12:47 PM

Kathleen Long OK checked with Nora, looks good to me!  
08/27/12 12:51 PM

Write a note... Add

Summary Documents | Approvers | Payments |

Open Document Options

BlueApple

Client: FixIT C  
145 Je  
Palo Alt

Amount \$2,000.00

Date: MM.DD.  
From: Joanna

Invoice #: 00289

Description: Design and Producti  
Additional Templates

Vendor: Blue Apple Design  
Invoice Number: 3001A (Last 5 bills)  
Payment Terms: Due upon receipt  
Invoice Date: 08/23/12  
Due Date: 08/23/12  
Credits Applied: \$0.00  
Status: Unpaid  
Description: For Logo Design  
- Apply Credits


Approvers: [add]  
Darren Linscott  
Approval message - [del] Sent  
Kathleen Long  
Approval message - [del] New - notes

Total: \$2,940.00

Shown in Notes

# Profile Picture

**Bill.com**

 Login

Email

Password

[Forgot password?](#)

[Don't have an account? Sign up risk free!](#)

**Command and Control**  
your cash flow,  
payables and receivables –  
anytime, anywhere.




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app4.28.1 27665.1

On your login page

# Profile Picture

The screenshot shows the Bill.com user management interface. At the top, there is a navigation bar with the Bill.com logo, menu items (Home, Inbox, Payables, Receivables, Documents, Reports), and a user profile for Kathleen Long. Below the navigation bar, there are tabs for Overview and Startup Checklist. The main content area is titled 'Users' and contains a table with columns for Name, Role, Authorized Funding Methods, and Email. A 'New' button is located in the top right corner of the table. Below the table, there is a checkbox labeled 'Show Inactive Users'.

Name	Role	Authorized Funding Methods	Email
 Rene Lacerte	Payer	None	vraghuraman+912@hq.bill.com
 Kathleen Long	Administrator	Bank	vraghuraman13@hq.bill.com
 Darren Linscott	Approver	None	vraghuraman+60@hq.bill.com

Show Inactive Users

List of users

- First Name,  
Last Name is  
now  
consolidated as  
Name columns  
in User List



Usability Feature

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# FEEDBACK

# Feedback

## What is it?

- Users can submit product feedback

## Who's it for?

- All users

## Why?

- Your feedback helps make our product better!!

# Feedback

Bill.com™ Home Inbox Payables Receivables Documents Reports Vijay Raghuraman BlueLeaf Consulting (Peachtree...)

Dashboard Cash Forecast Forecast Transactions

**To Do List**

- Pay: 7 bills **overdue** | 1 bill ready to be paid
- Approve 7 bills | 1 vendor credit
- Fix 2 bills that were denied
- Process 4 documents in Inbox
- Review 1 pending ePayment invitation(s)
- Review 9 uncashed check(s) (> 20 days)
- Track: 13 invoices **overdue**
- Express Pay Setup: pending test transaction

**Upload Your Bills**

test111810@test.cashview.com Upload your files:

Setup your fax Choose File no file selected Upload

**Cash Forecast**

August 2012

Bill.com™ Home Inbox Payables Receivables Documents Reports Vijay Raghuraman BlueLeaf Consulting (Peachtree...)

Dashboard Cash Forecast Forecast Transactions

**To Do List**

- Pay: 7 bills **overdue** | 1 bill ready to be paid
- Approve 7 bills | 1 vendor credit
- Fix 2 bills that were denied
- Process 4 documents in Inbox
- Review 1 pending ePayment invitation(s)
- Review 9 uncashed check(s) (> 20 days)
- Track: 13 invoices **overdue**
- Express Pay Setup: pending test transaction

**Upload Your Bills**

test111810@test.cashview.com Upload your files:

Setup your fax Choose File no file selected Upload

**Cash Forecast**

August 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25

**Feedback**

Rate this page ★★★★★

Comment

OK to contact you?

Send

Support

- Easy way to submit product feedback
- Please don't use for support





Send attachments with invoices

---

# RECEIVABLES

# Attach Docs To Invoice Email

- **What is it?**
  - Easily attach documents as part of the invoice flow and send those attachments as part of the email (in addition to making them available in the portal)
- **Who's it for?**
  - Customers/Clients who use AR and need to email attachments to their customers
- **Why?**
  - Makes the feature more prominent: some subscribers don't even know how to share documents with their customers
  - Sends the document within the email body: makes it easier for customers to view since they don't need to log into the portal
  - Ease of Use: you can add documents right in the workflow. Previously you would have three steps: create invoice, add docs, then send the invoice

# Attach Docs To Invoice Email

We now allow you to attach documents directly to the invoice email (and they are also available in the portal)

Option is not available when emailing more than 1 invoice at the same time.

We're Sending Your Invoices

**From** Henrique Ceribelli

**To** ceribill@gmail.com

Send me a copy of this email

**Subject** You have an invoice from My Company due on 09/06/12

**Attachments**

Attached Document(s)	File Size
<input checked="" type="checkbox"/> signed_quote.pdf	18 KB
18 KB total	

[Attach Document](#)

**Body**

Hi {Customer.Name:},

To pay your invoice online and view your account history, log in below:  
{Link\_Pay\_Invoice:}

Please remit payment at your earliest convenience.

Thank you for your business,  
My Company

-----  
Invoice Summary:

Invoice #: 006  
Amount Due: \$100.00  
Due Date: 09/06/12

A PDF version of this invoice and supporting documents are also attached for your records.

**Add Content to Reminder**

Select the content you want, and we'll substitute the actual value when emailing customers.

Step 1: Select one content.

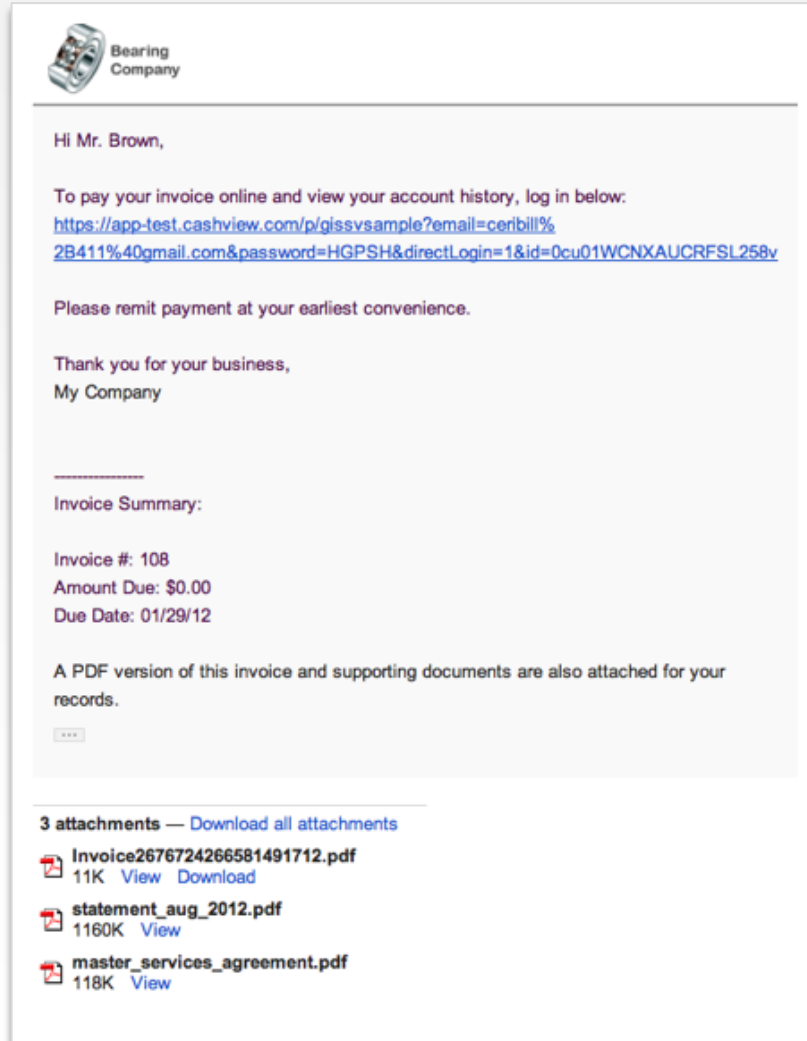
Select one

Step 2: Copy and paste this into the email:


Send Cancel

# Attach Docs To Invoice Email

Your customers receive a email with the invoice and supporting documents attached



The screenshot shows an email from Bearing Company. The email content includes a greeting to Mr. Brown, a link to log in to the account, a request for payment, and an invoice summary. The invoice summary lists the invoice number as 108, the amount due as \$0.00, and the due date as 01/29/12. Below the summary, it states that a PDF version of the invoice and supporting documents are attached. At the bottom of the email, there is a section for attachments, listing three PDF files: Invoice2676724266581491712.pdf (11K), statement\_aug\_2012.pdf (1160K), and master\_services\_agreement.pdf (118K).

 Bearing Company

Hi Mr. Brown,

To pay your invoice online and view your account history, log in below:  
<https://app-test.cashview.com/p/gissvsample?email=cerbill%2B411%40gmail.com&password=HGPSH&directLogin=1&id=0cu01WCNXAUCRFSL258v>

Please remit payment at your earliest convenience.

Thank you for your business,  
My Company

-----




Invoice Summary:

Invoice #: 108  
Amount Due: \$0.00  
Due Date: 01/29/12

A PDF version of this invoice and supporting documents are also attached for your records.

...

3 attachments — [Download all attachments](#)

-  Invoice2676724266581491712.pdf  
11K [View](#) [Download](#)
-  statement\_aug\_2012.pdf  
1160K [View](#)
-  master\_services\_agreement.pdf  
118K [View](#)



Broadcast messages to customers

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# RECEIVABLES

# Broadcast message to your customers

- **What is it?**
  - Send notes to multiple customers at the same time, without sending out an invoice
- **Who's it for?**
  - Customers/Clients who use AR and need to message their customers
- **Why?**
  - Useful to onboard new customers before sending their first invoice, so they know what to expect
  - Offers a very easy way to send a message about such things as terms of service or other notices that are the same for all customers

# Broadcast message to your customers

Click on the 'Message Customer' list on the Receivables Overview Page or Customer List

### Open Invoices

Open Invoices	#	Total	
Overdue	11	\$8,379.00	<a href="#">Send Reminder</a>
Due in Next 7 Days	1	\$10.00	<a href="#">Send Reminder</a>
Due in 7+ Days	3	\$30.00	<a href="#">Send Reminder</a>
<b>Total</b>	<b>15</b>	<b>\$8,419.00</b>	<a href="#">Send Reminder</a>
Invoices To Email	6		<a href="#">Send Email</a>
Invoices To Print/Mail	7		<a href="#">Print/Mail</a>

Last Sync Time with QuickBooks: 02/06/12 04:43 PM

[Create New Invoice](#)

### Payments Received

Payments Received in Bill.com	Total
Today	\$0.00
Last 7 Days	\$10.00
This Month (Aug)	\$40.00
Last Month (Jul)	\$50.00

Payments Scheduled in Bill.com	Total
Next 7 Days	\$0.00
All Future Payments	\$0.00

[Enter Payment](#)

### Customers

Find Customer  [Go](#)

[Message Customers](#) [New Customer](#)

Overview Invoices Recurring Invoices Payments **Customers** Items

[Message Customers](#) [Merge Duplicates](#) [New](#)

Customer: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) | [\[all\]](#)

Customer	City	State	Email	Phone	Payment Methods	Auto Charge
<a href="#">Ceribelli</a>	San Jose	California [CA]		408-333-3333	Bank	None
<a href="#">DRL.Bill.com</a>	San Jose	California [CA]	<a href="#">derl@gmail.com</a>	408-370-3763	Check	None
<a href="#">Ideal Printing</a>	San Jose	California [CA]	<a href="#">idealprinting@test.cashview.com</a>	408-333-3333	Check	None

# Broadcast message to your customers

Add a message, select customers and click 'next'

Send Public Note to Customers

Enter a note and select the customers you wish to notify

\* Note

Select: [ All | None ]

Customer: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | [all]

Customer	City	State	Email	Select
Ceribelli	San Jose	California [CA]	<input type="text" value="satisfactorytest@gmail.com"/>	<input type="checkbox"/>
DRL.Bill.com	San Jose	California [CA]	<input type="text" value="satisfactorytest@gmail.com, derl@gmail.com"/>	<input type="checkbox"/>
Ideal Printing	San Jose	California [CA]	<input type="text" value="idealprinting@gmail.com, idealprinting@test.cashview.com"/>	<input type="checkbox"/>
Judy's Printing Serivces	SAN JOSE	California [CA]	<input type="text" value="judyprinting99@gmail.com"/>	<input type="checkbox"/>
Mary's Landscaping	San Mateo	California [CA]	<input type="text" value="maryslandscaping@gmail.com"/>	<input type="checkbox"/>
Portal Bank Test	San Jose	California [CA]	<input type="text"/>	<input type="checkbox"/>
RackLite	San Jose	California [CA]	<input type="text" value="satisfactorytest@gmail.com"/>	<input type="checkbox"/>
Sippies Pizza	Sippies Pizza	Maryland [MD]	<input type="text" value="tdo+3@hq.bill.com, sippiespizza@gmail.com"/>	<input type="checkbox"/>
Skip's Pizza	asdf	sdfs	<input type="text"/>	<input type="checkbox"/>

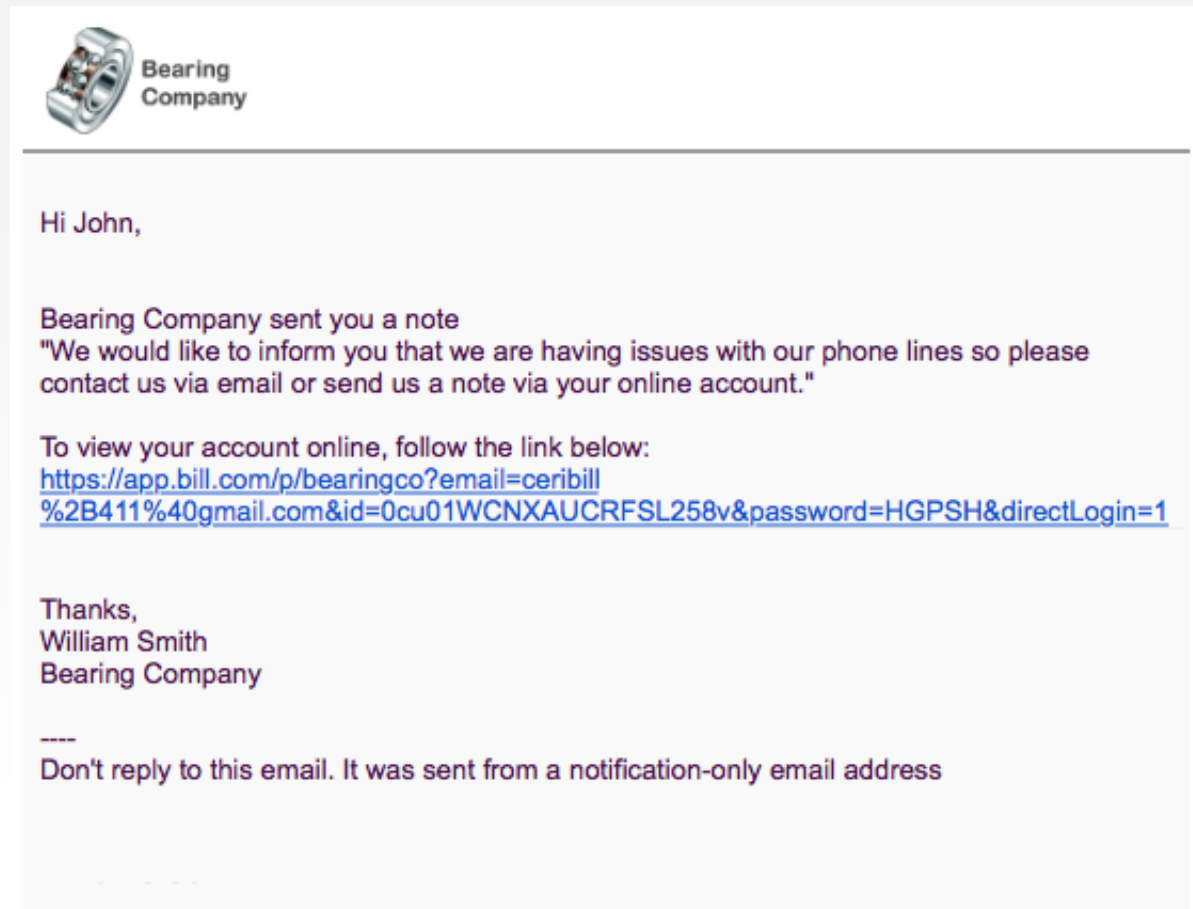
Next Cancel



# Broadcast message to your customers

Your customers receive an email with your note.

There is also a link to view their account online.





Re-apply payments received

---

# RECEIVABLES

# Re-apply payments received

- **What is it?**
  - Ability to re-apply payments received or recorded
  - Any changes made are synced to QuickBooks Windows and QuickBooks Online
- **Who's it for?**
  - Customers/Clients who use AR and need to change the invoices applied to the payment received
- **Why?**
  - Your customer paid in the portal but he/she selected the wrong invoice to paid (e.g. paid new invoice instead of an older one)
  - You recorded a payment or charged a customer but applied it to the wrong invoices

# Re-apply payments received

To update any payment received or recorded in Bill.com, click Edit.

Payments Received

Details | Documents | Fundings | Invoice Payments | Disbursements | Audit Trail Cancel Payment

Edit

**Invoice Payment Information**

Customer Paul Mc  
Payment Date 08/28/12

Customer Paul Mc  
Amount \$110.00  
Payment Date 08/28/12  
Payment Type Check  
Reference Number 123  
Deposit To 1010 Undeposited Fur  
Memo Check received on 08/28/12

Apply Payment To:

Invoice Number	Invoice Date	Due Date	Amount	Amount Due	Amount Paid	Select
5067	09/11/12	09/21/12	\$110.00	\$110.00	\$110.00	<input checked="" type="checkbox"/>
5064	09/04/12	09/14/12	\$110.00	\$110.00	\$0.00	<input type="checkbox"/>

Unapplied amount: \$0.00

Save Cancel



Invoice departments for QuickBooks Online

---

# RECEIVABLES

# Invoice departments for QuickBooks Online

- **What is it?**
  - You can track invoices by departments (classes in QBO)
  - Departments on the invoice line item are synced to QuickBooks Online
- **Who's it for?**
  - Customers/Clients who use AR, departments/classes and QuickBooks Online
- **Why?**
  - You create invoices in Bill.com and you need to track them by department/classes

# Invoice departments for QuickBooks Online

If you use Departments, you can track your invoice line items by department.

New Invoice

Customer:  Details | Last 5 invoices

Invoice Template:

Invoice Number:

P.O. Number:

Invoice Date:

Sales Rep:

Payment Terms:

Department:

Due Date:

Item	Description	Department	Quantity	Price	Tax	Amount
<input type="text" value="Hours"/>	<input type="text" value="Trade Show"/>	<input type="text" value="Sales"/>	<input type="text" value="1"/>	<input type="text" value="\$400.00"/>	<input type="checkbox"/>	\$400.00
<input type="text" value="Hours"/>	<input type="text" value="Logo Design"/>	<input type="text" value="Marketing"/>	<input type="text" value="3"/>	<input type="text" value="\$100.00"/>	<input type="checkbox"/>	\$300.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	\$0.00

[+ Add more items](#)

Subtotal: \$700.00

How do I add Sales Tax? Sales Tax:

Balance Due: \$700.00

Customer Message:

Send Via:  Email  Now  Later

Print/Mail



QuickBooks Windows, QuickBooks Online, Intacct, Sage  
50/Peachtree

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## **SYNC ENHANCEMENTS**



# Sync Enhancements

- **What is it?**
  - QuickBooks for Windows: simplified first-time sync, streamlined on-going sync for fewer errors
  - QuickBooks Online: simplified first-time sync, streamlined on-going sync for fewer errors
  - Intacct: streamlined on-going sync for fewer errors
- **Who's it for?**
  - Customers/clients who sync with QuickBooks Online, QuickBooks Windows or Intacct
- **Why?**
  - Sync is crucial to saving you time, we're constantly making improvements

# Sync Enhancements

We've streamlined on-going sync for fewer errors with QuickBooks Online, QuickBooks Windows and Intacct.

Sync Status


Status | Setup | Preferences | History

We're updating your data with changes.

Updating...

**Bill.com**

- Vendors
- Customers / Jobs
- Departments (QBO "classes")
- Bills
- Vendor Credits
- Invoices
- Payments
- Funds Transfers



**QuickBooks Online**

- Accounts
- Vendors
- Customers / Jobs
- Items
- Departments (QBO "classes")
- New Unpaid Bills

# Sync Enhancements

## Support for Sage 50/Peachtree 2013

The screenshot displays the Bill.com user interface. At the top, the Bill.com logo is on the left, and navigation links for Home, Inbox, Payables, Receivables, Documents, and Reports are in the center. On the right, the user's name 'Kathleen Long' and company 'BlueLeaf Consulting (Peachtree...)' are shown, along with icons for help, search, and settings. Below the navigation bar, there are tabs for 'Overview' and 'Startup Checklist'. The main content area is titled 'Setup' and includes a sub-tab for 'Preferences'. A highlighted box contains the following information:

**Your Accounting Software** Peachtree ([Change](#))

**What Is Bill.com Sync?**  
It's a way to keep your Peachtree file up-to-date with your Bill.com activity, without a lot of typing. [Learn more](#)

[Download Bill.com Sync.](#)

[Step-by-step instructions ?](#)

**System Requirements**

- Windows 7/Vista/XP/2008 Server/2003 Server/2000 Server
- Peachtree Complete/Premium/Accountant/Quantum 2009 and later



# Q&A

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