

Thank You for Attending the February 2012 Release Webinar

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



February 2012 Release



Agenda

- Introduction & Presenters
 - **Release Date: 2/24/2012 - Downtime: 8pm PT - ~2am PT**
 - Darren - VP Products
 - Henrique - Senior Product Manager - Accounts Receivable
 - Vijay - Senior Product Manager - Accounts Payable
- Release Summary
 - CashView (Beta)
 - Receiving Overpayments / Prepayments
 - Branded Emails
 - Accountant Directory
 - Accountant Training
 - Accountant Selling Tools
- Q&A

CashView (beta) Overview



CashView

Imagine:

1. Tossing your cash management spreadsheet and leveraging Bill.com to do this in the cloud...
but how do I deal with transactions not in Bill.com?
2. Having the control over the system when the inflow and outflows of cash will occur
but these things never happen on the due date.

Now you can do just that:

- Complete management your end to end cash flow in Bill.com
- Add transactions solely for the purpose of tweaking your cash position and for reflecting bills and cash receipts not recorded in bill.com
- Tell the system when cash will actually change by updating the 'Cash Date' of those transactions

CashView - Beta

- **What is it?**

- A short-term-focused cash forecasting tool that:
 - Provides insightful visualizations of your cash position aggregated across all cash accounts
 - Enables you to forecast all inflows and outflows of cash, not just transactions in Bill.com

- **Who's it for?**

- For all our customers

- **Why?**

- Shows you where you are going, rather than where you've been as does your accounting system
- Eliminates your 'cash management' spreadsheet and the weekly process of updating, reviewing and then paying bills and collecting on invoices separately

CashView - Dashboard

• Enable CashView right from your dashboard

• You can switch back to the old calendar, if needed.

To Do List

- Pay: 19 bills **overdue** | 19 bills ready to be paid
- Process 2 documents in Inbox
- Track: 5 invoices **overdue**

Find A Vendor

Find

Getting Started with Bill.com

[Watch Video Tutorials](#)
[Startup Checklist](#)

Quick Links

[Enter bill with documents](#)
[Enter bill without document](#)
[Pay Vendors via ePayment](#)
[Manage users](#)
[View chart of accounts](#)

Bill.com Payment Network

Skip the invitation for your customers who use Bill.com. Have them enter your ID to enable ePayments:

Payment Network ID 0189187674609197

Upload Your Bills ?

- Setup your email
- Setup your fax

Projected Cash Flow for Default Checking

Feb 11, 2012

◀ Week ▶
 Hide unpaid bills/invoices

Sun	Mon	Tue	Wed	Thu	Fri	Sat
5	6	7	8	9	10	11 \$23,762 (\$18,457)
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	March 1	2	3
4	5	6	7	8	9	10

Try Cashview Beta

Try Cashview Beta

Cashview replaces your existing Calendar and offers new and powerful ways to view and manage your future cash position.

[Yes, I'd like to try it!](#) [Learn More](#)
close

CashView - Dashboard

- Once Enabled, note the new navigation
- New Charting makes it easier to see your cash over time - also try out the new calendar

New Sub-navigation

To Do List

- Pay: 19 bills **overdue** | 19 bills ready to be paid
- Process 2 documents in Inbox
- Track: 5 invoices **overdue**

Find A Vendor

Getting Started with Bill.com

Watch Video Tutorials
Startup Checklist

Quick Links

- Enter bill with documents
- Enter bill without document
- Pay Vendors via ePayment
- Manage users
- View chart of accounts

Bill.com Payment Network

Skip the invitation for your customers who use Bill.com. Have them enter your ID to enable ePayments:

Payment Network ID 0189187674609197

Upload Your Bills ?

Setup your email Upload your files:
Setup your fax Choose File No file chosen Upload

CashView Beta ?

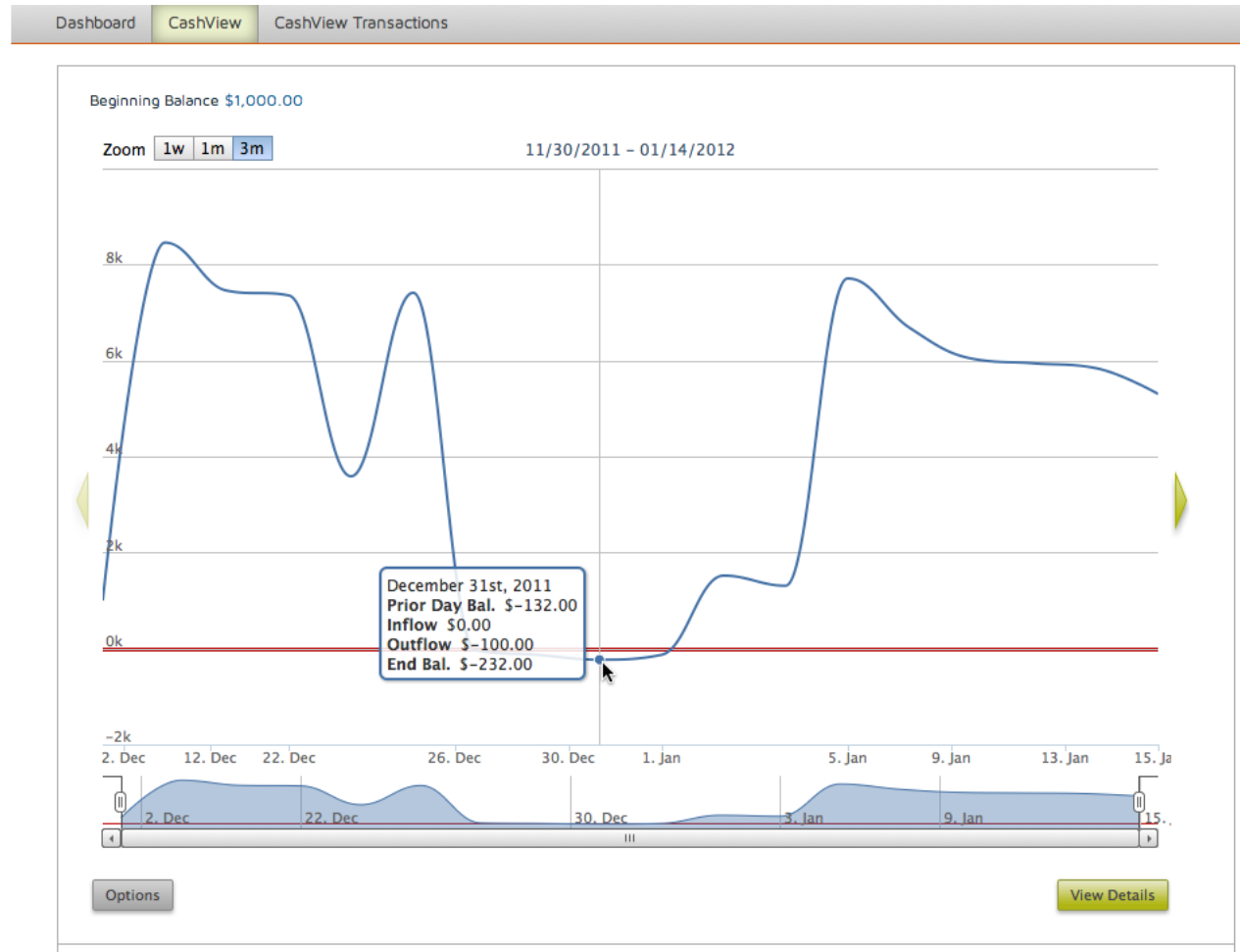
Zoom 1w 1m 3m 11/30/2011 - 01/14/2012

December 22nd, 2011
Prior Day Bal. \$7,455.00
Inflow \$0.00
Outflow \$-100.00
End Bal. \$7,355.00

Change between Chart & new Calendar

CashView Tab

- Click on a day on the Dashboard Chart or click on the CashView tab to see an enlarged view of the Chart or new Calendar



CashView - Options

- Specify the Start date from which you wish to project your cash flows.
- Specify the Starting Cash Balance (typically book balance) that corresponds to that starting date
- Specify the filters

Dashboard CashView CashView Transactions

CashView Settings

Project Cash Flow (up to 3 months)
Start with today, or any day where you have book or bank balances of your cash accounts

Start

Starting Cash Balance
Enter the total book or bank balance of all your cash accounts for the Start date you entered

Inflows
Include these transactions

- Unpaid/partially paid Invoices
- Offline Invoice Payments
- Scheduled Invoice Payments
- Processed Invoice Payments
- Unused Vendor Credits
- Inflow Forecast Transactions

Outflows
Include these transactions

- Unpaid/partially paid Bills
 - Exclude unapproved Bills
 - Exclude denied Bills
- Offline Bill Payments
- Scheduled Bill Payments
- Processed Bill Payments
- Outflow Forecast Transactions

Sync Balances with your accounting system

- For Quickbooks Desktop and Intacct, automatically sync the bank account balance (for the primary payables account balance) if desired

Use Last Sync Dates and Cash Balances [?](#)

Last Sync Date: 

Last Sync Amt:

Enter Balances Manually [?](#)

Start Date: 

Start Balance:

[Learn More](#)

Inflows

Include these transactions

- Unpaid/partially paid Invoices
- Offline Invoice Payments
- Scheduled Invoice Payments
- Processed Invoice Payments
- Unused Vendor Credits
- Inflow Forecast Transactions
- Credit Notes

Outflows

Include these transactions

- Unpaid/partially paid Bills
 - Exclude unapproved Bills
 - Exclude denied Bills
- Offline Bill Payments
- Scheduled Invoice Payments
- Processed Invoice Payments
- Outflow Forecast Transactions

Save

Cancel

CashView - Filters Explained

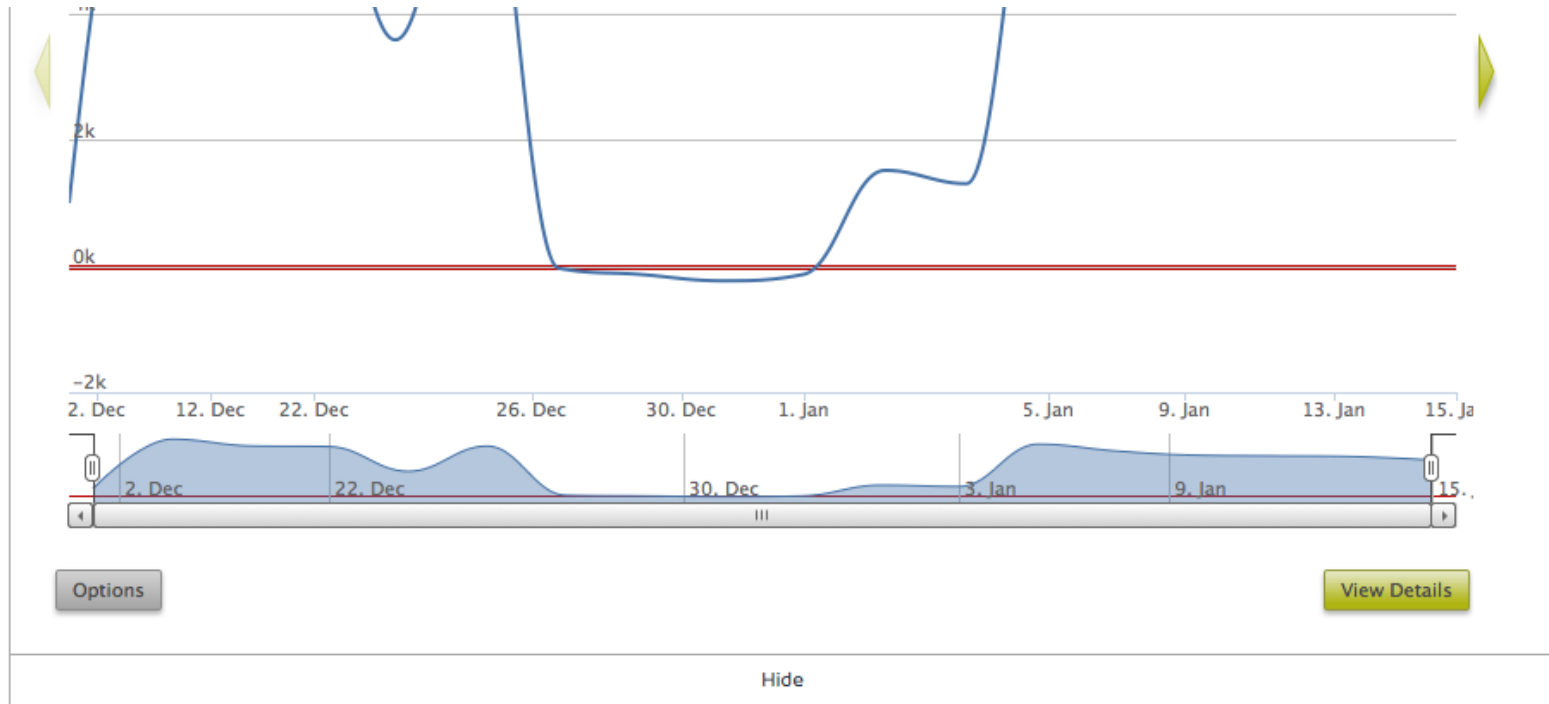
- Inflows
 - Unpaid/partially paid Invoices
 - Include invoices that have any open balance
 - The cash from paid invoices is accounted for as invoice payments
 - Offline Invoice Payments
 - Include any payments that aren't online (e.g. paypal, credit cards, ePayments)
 - Scheduled Invoice Payments
 - Include payments that have been scheduled for an invoice but that have not actually processed
 - Processed Invoice Payments
 - Includes payments that have been processed
 - Unused Vendor Credits
 - Inflow CashView Transactions
 - A new transaction type (more on this later)

CashView - Filters Explained

- Outflows
 - Unpaid/partially paid Bills
 - Include bills that have any open balance
 - The cash from paid bills is accounted for as bill payments
 - Exclude unapproved Bills
 - Don't include the cash impact of unapproved bills
 - Exclude denied Bills
 - Don't include bills that have been denied
 - Offline Bill Payments
 - Include payments that aren't ePayments or Paypal
 - Scheduled Invoice Payments
 - Processed Invoice Payments
 - Outflow CashView Transactions

CashView - Details

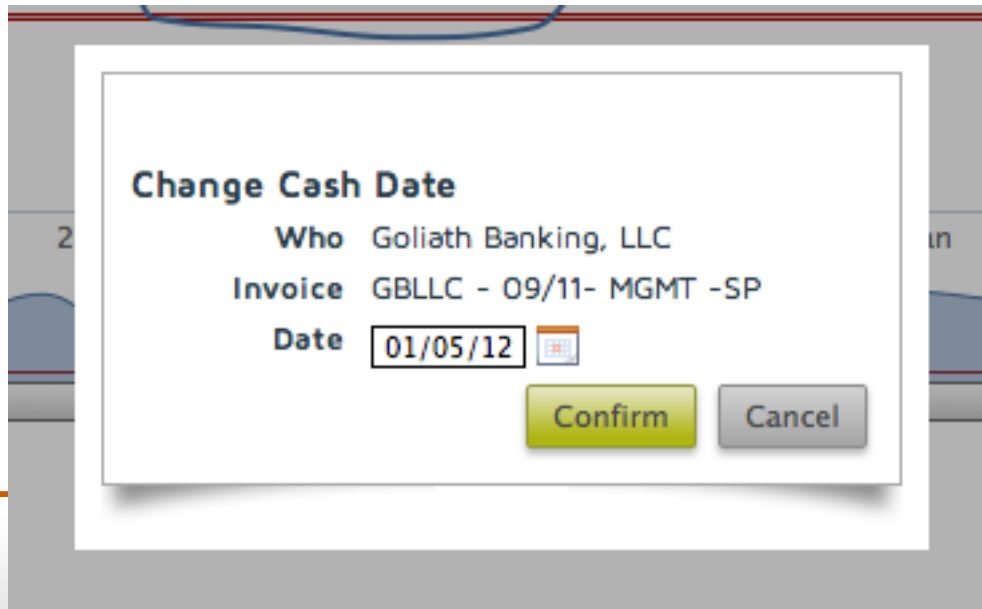
- Clicking on a day or selecting a range and clicking 'View Details' will list all of the related transactions with a running total



Cash Date	Number	Type	Cash Amount	Balance	Actions
2012-01-05	GBLLC - 09/11- MGMT - SP	Invoice	\$6,500.00	\$7,808.93	Change Cash Date
2012-01-05	DCS 00151	Bill	(\$100.00)	\$7,708.93	Pay Change Cash Date

CashView - Actions

- Take action by clicking on a transaction in the detail list
- Actions vary by the transaction type
- Change the 'Cash date' on Bills, Vendor Credits and Invoices based on when they should impact your cash flow



A screenshot of a software dialog box titled "Change Cash Date". The dialog box is white with a thin border and is centered on a grey background. It contains the following text: "Who Goliath Banking, LLC", "Invoice GBLLC - 09/11- MGMT -SP", and "Date 01/05/12" with a small calendar icon to the right of the date field. At the bottom of the dialog box are two buttons: a green "Confirm" button and a grey "Cancel" button.

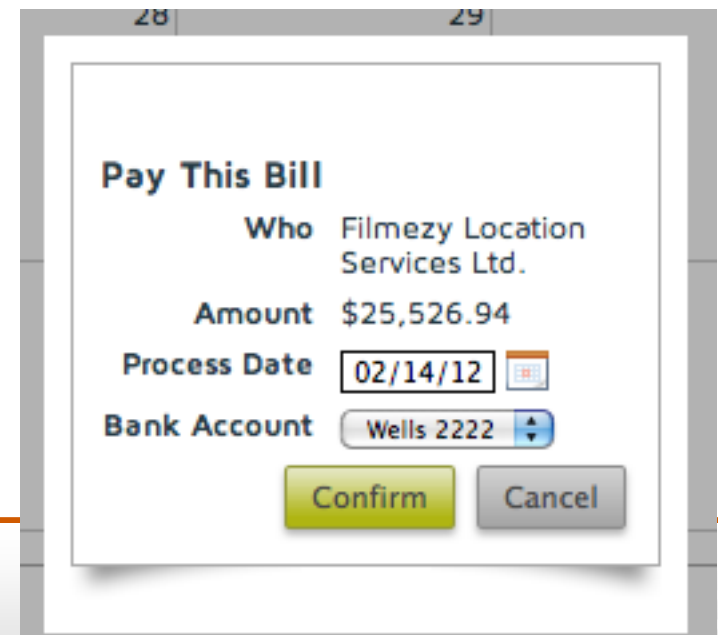
Change Cash Date

Who Goliath Banking, LLC

Invoice GBLLC - 09/11- MGMT -SP

Date 01/05/12

Confirm Cancel



A screenshot of a software dialog box titled "Pay This Bill". The dialog box is white with a thin border and is centered on a grey background. It contains the following text: "Who Filmezy Location Services Ltd.", "Amount \$25,526.94", "Process Date 02/14/12" with a small calendar icon to the right of the date field, and "Bank Account Wells 2222" with a dropdown arrow to the right of the account name. At the bottom of the dialog box are two buttons: a green "Confirm" button and a grey "Cancel" button.

Pay This Bill

Who Filmezy Location Services Ltd.

Amount \$25,526.94

Process Date 02/14/12

Bank Account Wells 2222

Confirm Cancel

CashView Transactions

- Enter CashView transactions to adjust your forecast for inflows and outflow for items not otherwise in Bill.com
 - Payroll
 - Cash receipts
- The Cash Date you enter specifies when that transaction appears on your chart

Dashboard CashView **CashView Transactions**

Cashview Transactions

To add a transaction that isn't in Bill.com, click New. For bill payments and other spending, enter a negative number. And don't worry, these transactions won't affect your books: we use them only to project your expected cash flow.

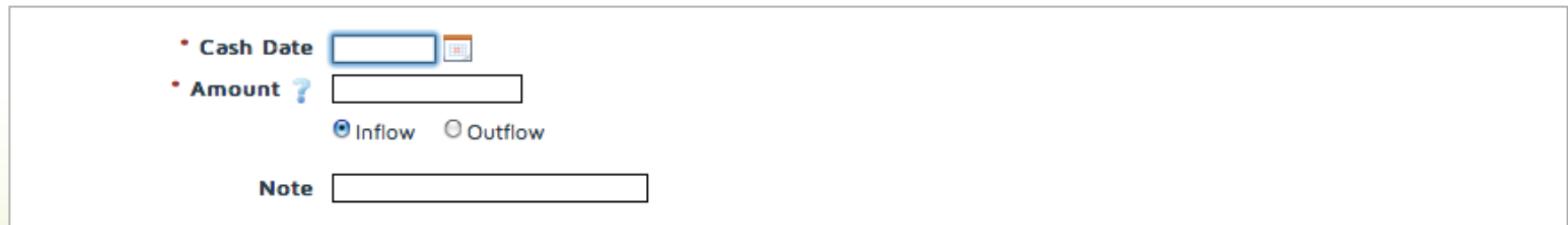
Cash Date to

Cash Date ▼	Number	Amount	Note
01/01/12	3	\$100.00	
12/15/11	1	(\$1,000.00)	Banking Payment not in BDC
01/15/11	2	\$1,500.00	Receipt
01/12/11	4	\$5,000.00	Receipt

Show Inactive Cashview Transactions

Adjusting your CashView with CashView Transactions - 2

- Enter a negative amount or select the 'outflow' radial to indicate an outflow of cash
- Add a note to remind yourself what it was for
- Note that CashView transactions don't impact your Chart/Calendar if they are before your start date
- These transactions don't affect your books

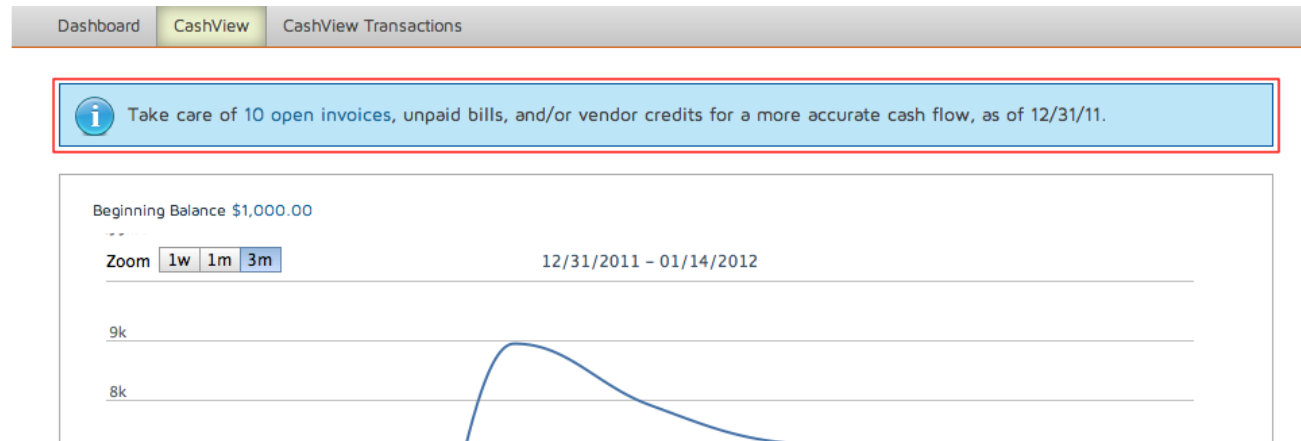


The screenshot shows a form for entering a transaction. It includes a 'Cash Date' field with a calendar icon, an 'Amount' field with a question mark icon, and radio buttons for 'Inflow' (selected) and 'Outflow'. There is also a 'Note' text area.

Save Cancel

Adjust Outdated Transactions

- If you have open transactions that are before your start date, you will be informed with this message
- Click on the link to display the list
- Change the Cash Dates to when you expect the transaction to impact your cash flow



Dashboard CashView CashView Transactions

Options Show Chart

i The open transactions below don't appear on your CashView Chart, because they have a Cash Date before the Start Date.

Cash Date	Number	Type	Cash Amount	Actions
2011-12-04	FIC - 09/11 - CS	Invoice	\$7,455.00	Change Cash Date
2011-12-22	DCS 00145	Bill	(\$100.00)	Change Cash Date
2011-12-23	LWD - 10/15/11	Bill	(\$8,000.00)	Change Cash Date
2011-12-23	GBLLC - 09/11 - CS	Invoice	\$4,232.17	Change Cash Date
2011-12-24	DCS 00146	Bill	(\$100.00)	Change Cash Date
2011-12-24	FL - 09/11 - IT	Invoice	\$3,925.00	Change Cash Date
2011-12-27	09/19/11	Bill	(\$7,344.91)	Change Cash Date
2011-12-27	DCS 00147	Bill	(\$100.00)	Change Cash Date
2011-12-29	DCS 00148	Bill	(\$100.00)	Change Cash Date
2011-12-31	DCS 00149	Bill	(\$100.00)	Change Cash Date

Receiving Overpayments and Prepayments

Receivables



Receiving Overpayments / Prepayments

Imagine:

1. You received a check of \$1,000.00 for an invoice that was \$999.00.
2. Your customer wants to pre-pay next month's rent in your payment portal (e.g. he is going on vacation).
3. You want to collect donations (churches / associations / etc).

Before:

- You would have to create an invoice before receiving / entering the payment in Bill.com.

Now you can:

- Receive or enter payments even if there are no open invoices.

Receiving Overpayments / Prepayments

- **What is it?**
 - You can now receive over payments and pre-payments
 - Then you can apply the credit from the overpayment/pre-payment to future invoices
- **Who's it for?**
 - Any company that may receive payments greater than the original invoices or receive pre-payments or donations
- **Why?**
 - Receive a check where the customer rounded up the amount due
 - Receive pre-payments for rents, ad campaigns and any other services
 - Collect donations for churches, associations or other non-profits

Entering Overpayments and prepayments

- When entering a payment, if the amount is greater than the open invoices, the unapplied amount will remain as a customer credit

The screenshot shows the 'Enter Customer Payment' window with the following fields:

- Customer: Charles
- Amount: 90.00 (with an 'Apply' button)
- Payment Date: 02/09/12
- Payment Type: Check
- Reference Number: 4911
- Deposit To: 12000 Undeposited
- Memo: (empty)

Below the fields is a table for 'Apply Payment To':

Invoice #	Due Date	Amount	Due	Paid	Select
300	02/09/12	\$89.00	\$89.00	\$89.00	<input checked="" type="checkbox"/>

At the bottom of the window, a box highlights the text: **Unapplied amount: \$1.00**

To the right is an image of a check with handwritten details:

- Number: 4911
- Date: 2/19
- Amount: 90
- Reference: 90-1536/1222
- Amount written: \$ 90.00
- Text: 00/100 DOLLARS

Viewing Credits from Overpayments

- We highlight if a customer has credits available and you can apply them.

Enter Customer Payment

Customer Payment

• Customer Credits Available: \$100.00 (Apply)

Charge Customer
 Record Manual Payment

Apply Customer Credits

Customer: Matt Mc

Credits Available:

Amount	Reference Number	Payment Date	Payment Type	Available Amount
\$100.00	Bill.com ePayment	02/10/12	ePayment	\$100.00
Total credits available: \$100.00				(Apply)

Apply Credits To:

Invoice Number	Invoice Date	Due Date	Amount	Amount Due	Credit Amount	Select
602	02/10/12	02/10/12	\$150.00	\$150.00	<input type="text" value="\$100.00"/>	<input checked="" type="checkbox"/>

Applying Credits to New Invoices

- When you create a new invoice, you will see the credits available. Check the box to apply them.

New Invoice

• **Customer** Details | Last 5 invoices

• **Invoice Number**

• **Invoice Date** 📅

Payment Terms

• **Due Date** 📅

• **Invoice Template**

P.O. Number

Sales Rep

Item	Description	Quantity	Price	Tax	Amount
<input type="text" value="Civil Engineering : C"/>	<input type="text" value="Civil Engineering"/>	<input type="text" value="2.5"/>	<input type="text" value="\$100.00"/>	<input type="checkbox"/>	\$250.00 ✘

[+ Add more items](#)

Subtotal \$250.00

How do I add Sales Tax? **Sales Tax**

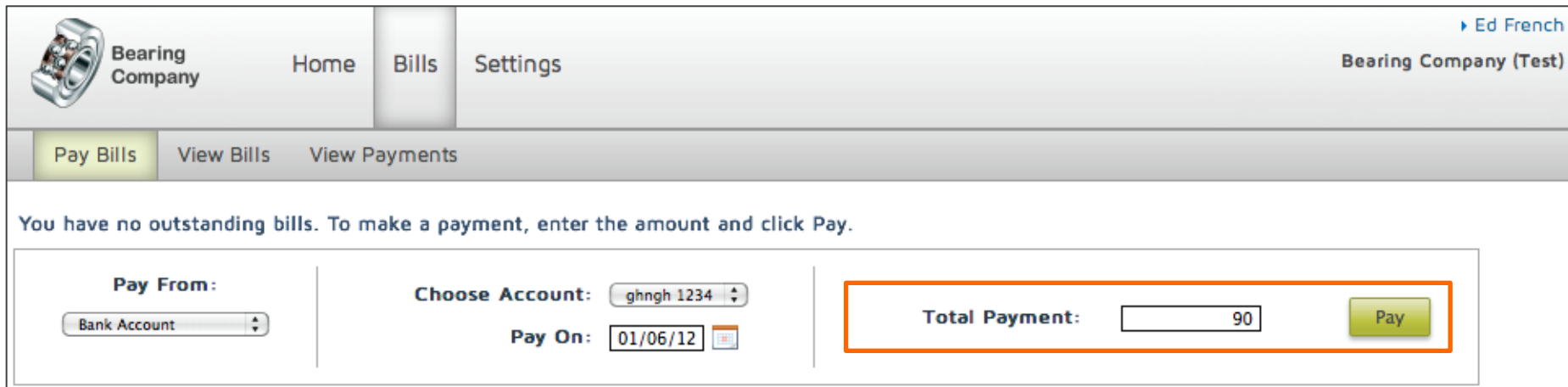
\$0.00

Credits Available \$100.00

Balance Due \$150.00

Your Customers: Overpay / Prepay

- When your customers pay you via the portal, they can overpay the amount due or pay you even if there is no open invoices (e.g. donations)



The screenshot shows a web interface for 'Bearing Company'. The top navigation bar includes 'Home', 'Bills', and 'Settings'. The user is logged in as 'Ed French' and the account is 'Bearing Company (Test)'. Below the navigation, there are three tabs: 'Pay Bills', 'View Bills', and 'View Payments'. The main content area displays the message: 'You have no outstanding bills. To make a payment, enter the amount and click Pay.' Below this message is a payment form with the following fields: 'Pay From:' with a dropdown menu showing 'Bank Account'; 'Choose Account:' with a dropdown menu showing 'ghngh 1234'; 'Pay On:' with a date input field showing '01/06/12' and a calendar icon; and a 'Total Payment:' field with a text input containing '90' and a green 'Pay' button. The 'Total Payment' field and the 'Pay' button are highlighted with an orange border.

Your Customers: Viewing Credits

- When your customer logs into your payment portal, they will see if there are any credits available.
- We will automatically apply them when they make a new payment.

The screenshot shows a customer's payment portal for 'Bearing Company'. The top navigation bar includes the company logo, 'Home', 'Bills', and 'Settings' links, and the user's name 'Ed French' and account name 'Bearing Company (Test)'. The main content area is divided into three sections: 'Summary', 'Contact Support', and 'Bills'. The 'Summary' section contains a table with account balances and a 'Credits Available: \$100.00' box highlighted in orange. The 'Contact Support' section provides the company's address and phone number. The 'Bills' section shows a table of outstanding bills.

Summary	
Current Balance	\$0.00
Total Scheduled Payments	\$0.00
Open Balance	\$0.00
Pay Outstanding Bills Auto Pay your bills Credits Available: \$100.00	

Bills	
Outstanding Bills	0
Unpaid Bills	0
Partially Paid Bills	0
Bills Scheduled to be Paid	0

Contact Support
Bearing Company (Test)
3200 Ash Street
Palo Alto, CA 94306
Phone: 510-225-8195

- Profile
- Bank Accounts
- Auto Pay is Off

Branded Emails



Branded Emails

Imagine:

1. You want your customers and vendors to see your branding on emails you send them.
2. **Accountants with a console:** You want your clients to see your brand in the emails we send to them (To Do's, approvals, etc).
3. You want emails to be more easily readable (better tables, shorter links, etc)

Before:

- Other than emails sent to your customers, there was no branding on emails send via Bill.com.

Now you can:

- Add your brand (some cases) / better email format.

Branded Emails

- **What is it?**

Branding on all emails sent using Bill.com:

- **Your Brand:** on emails you send to your customers and vendors.
- **Your Firm's Brand:** on emails you / your clients receive if your company or client's companies are under of a console.
- **Bill.com Brand:** on emails your receive (if not under of a console).

- **Who's it for?**

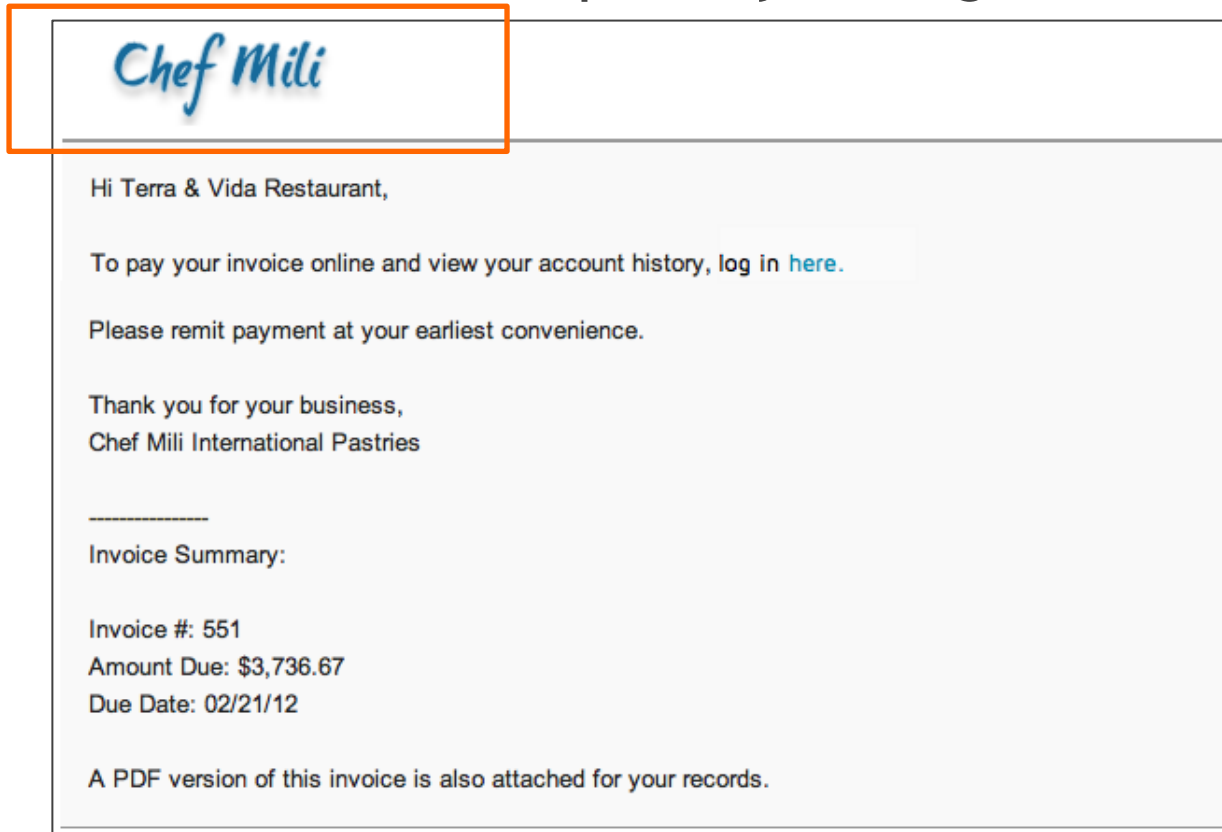
- All users receiving emails sent via Bill.com

- **Why?**

- More readable format / tables (html emails).
- Your brand in your customers/vendors or client's communications.
- Consistent brand on emails.

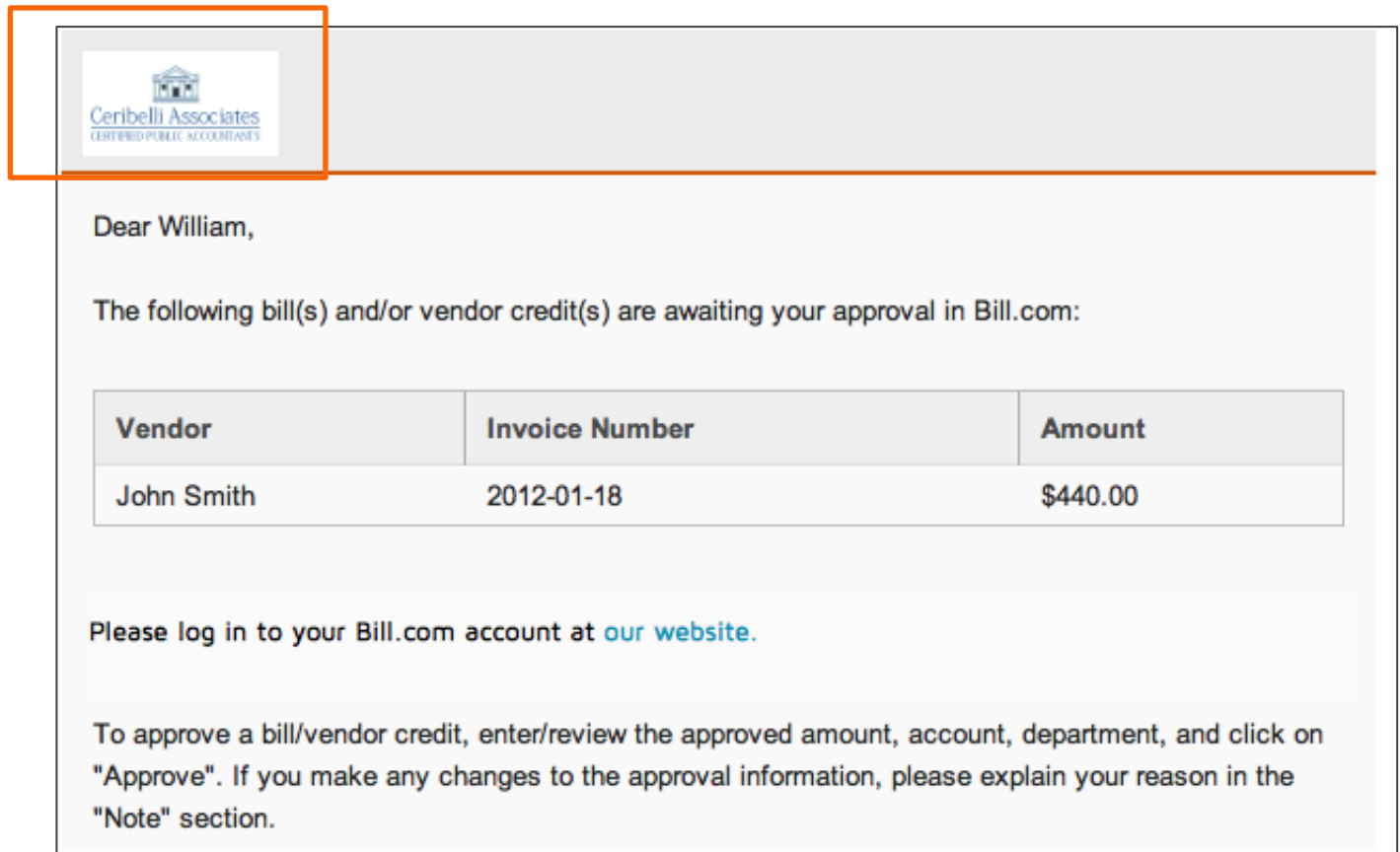
Your Brand - Your customers / vendors

- Emails sent to your customers and vendors will have your brand on it. Make sure to upload your logo into Bill.com*



Your Brand - Your clients

- Emails we sent to your clients (accounts under your console) will have your brand on it *.



Dear William,

The following bill(s) and/or vendor credit(s) are awaiting your approval in Bill.com:

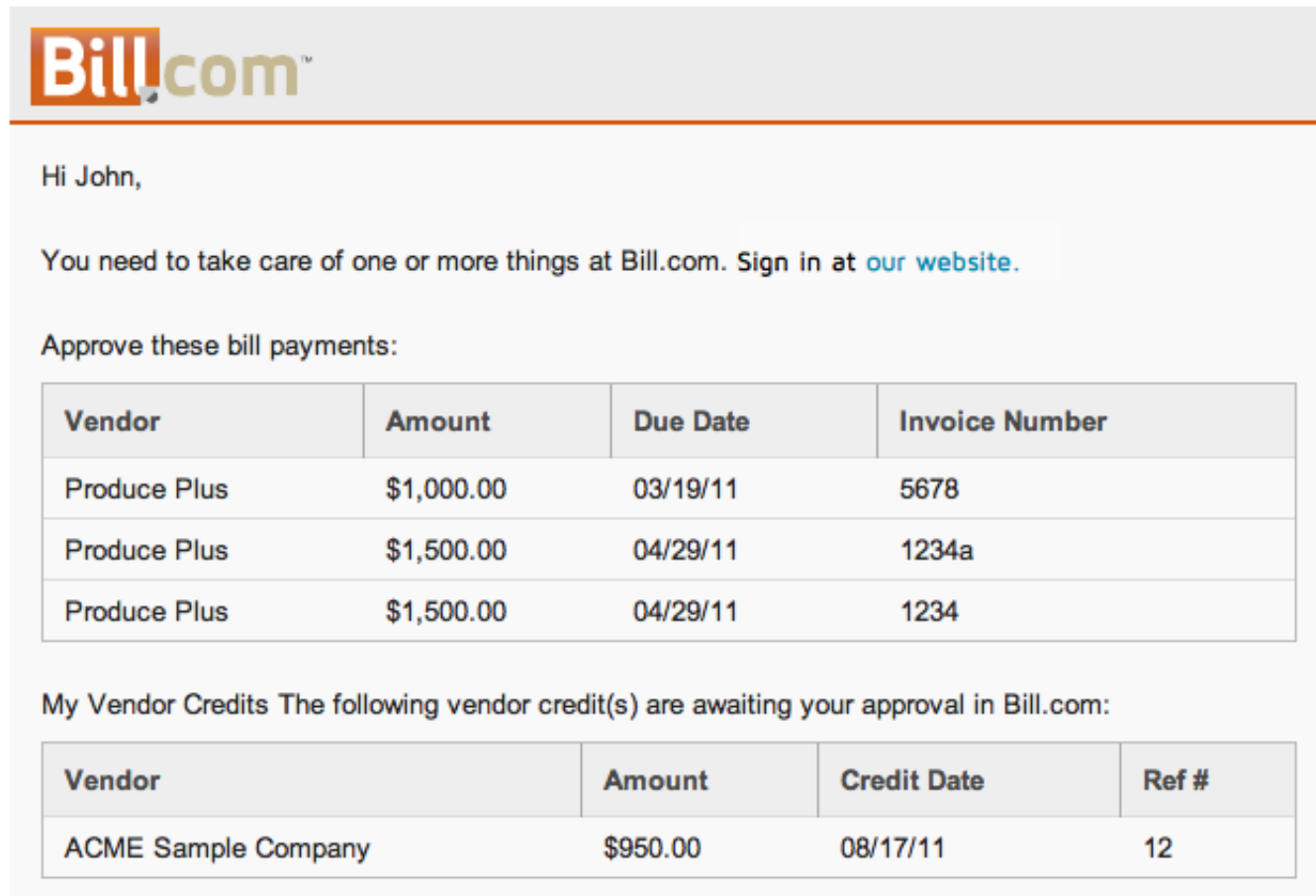
Vendor	Invoice Number	Amount
John Smith	2012-01-18	\$440.00

Please log in to your Bill.com account at [our website](#).

To approve a bill/vendor credit, enter/review the approved amount, account, department, and click on "Approve". If you make any changes to the approval information, please explain your reason in the "Note" section.

Bill.com Brand

- The emails you receive (if your company is not part of a console) have the Bill.com logo and html formatting.



Bill.com

Hi John,

You need to take care of one or more things at Bill.com. Sign in at [our website](#).

Approve these bill payments:

Vendor	Amount	Due Date	Invoice Number
Produce Plus	\$1,000.00	03/19/11	5678
Produce Plus	\$1,500.00	04/29/11	1234a
Produce Plus	\$1,500.00	04/29/11	1234

My Vendor Credits The following vendor credit(s) are awaiting your approval in Bill.com:

Vendor	Amount	Credit Date	Ref #
ACME Sample Company	\$950.00	08/17/11	12

Accountant Training

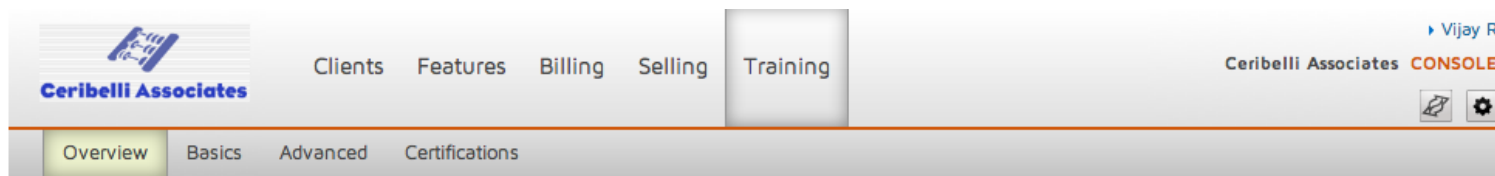


Bill.com Accountant Training

- **What is it?**
 - Comprehensive training for accountant firm staff
- **Who's it for?**
 - For accounting firms
- **Why?**
 - For firms to help provide the best service to existing/new clients
 - Equip firms with an action plan to grow their practice

Bill.com Accountant Training

Access training by logging to your Console. Click on the Training tab.



Get the most out of Bill.com!

Basics

Videos that explain how to get started, handle clients' payables and receivables, and keep track of how much cash they have on hand. [More](#)

Advanced

Expert

An online course that explains how to customize and automate for greater efficiency, and how to handle special payables and receivables situations. Complete this course to earn Bill.com Expert Certification (we recommend you first review the Basics) [More](#)

Certifications

Recognition that you've completed some (or all) of our Advanced training. Get recognized for your expertise by displaying our Expert and/or Guru certifications on your blog, website, or other areas of your business. [More](#)

Bill.com Accountant Training

Basics: Video tutorials that explain how to get started, handle clients' payables and receivables, and keep track of how much cash they have on hand.

The screenshot shows the Bill.com Accountant Training console. At the top, there is a navigation bar with the Bill.com logo on the left and the user name 'Vijay 13' on the right. Below the navigation bar, there are tabs for 'Clients', 'Features', 'Billing', 'Selling', and 'Training'. The 'Training' tab is selected. Below the tabs, there are sub-tabs for 'Overview', 'Basics', 'Advanced', and 'Certifications'. The 'Basics' sub-tab is selected. The main content area displays a list of video tutorials under the heading 'Watch these videos to start handling clients' payables and receivables'. The tutorials are organized into three sections: 'Manage clients', 'Get started', and 'Settings'. Each section includes a viewing time and a list of video titles.

Watch these videos to start handling clients' payables and receivables

Manage clients
Viewing time: 15 minutes

1. Where it happens: the Console
2. Your bill
3. Your price plan
4. Your statements
5. What clients use
6. Add clients
7. Add your logo and a URL
8. Add users
9. Add roles and permissions
10. Create a demo
11. List in our Directory

Get started
Viewing time: 10 minutes

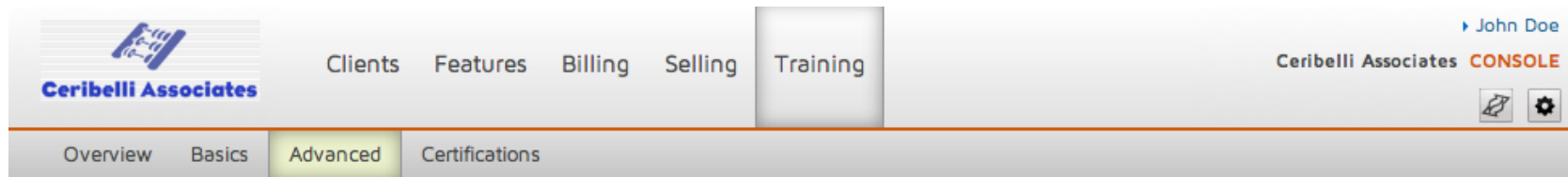
1. Overview
2. Inbox
3. Payables
4. Receivables
5. Sync with accounting

Settings
Viewing time: 10 minutes

1. Overview
2. Inbox
3. Payables
4. Receivables
5. Sync with accounting
5. Accounting preferences
6. Your account with us

Bill.com Accountant Training

Expert: This course explains how to customize and automate for greater efficiency, and how to handle special payables and receivables situations.



Get the most out of Bill.com!

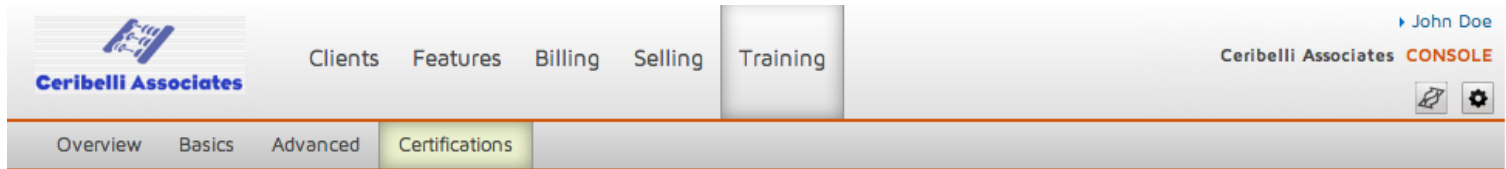
Expert [Go to the training](#)

This course explains how to customize and automate for greater efficiency, and how to handle special payables and receivables situations. [More](#)

Guru (coming soon): This course explains how to improve the way that clients do their payables and receivables, and how to develop your accounting practice for greater profitability.

Bill.com Accountant Training

Certifications: Once certified, show your certification logos on your blog, website etc and get priority placement in the Bill.com Accountant Directory.



Based on your completion of our online courses, here is your certified level of expertise with Bill.com

Get Certified



Complete our online course and get recognized for your expertise! Show the Bill.com Expert logo on your blog, website, and other areas of your business.

Get Your Company Certified



Complete our online course (you or a staff member), and your company will be "Bill.com Certified". Show the Bill.com Certified logo on your blog, website, and other areas of your business. We'll show it in your Bill.com Accountant Directory listing and give you priority placement.

Accountant Directory

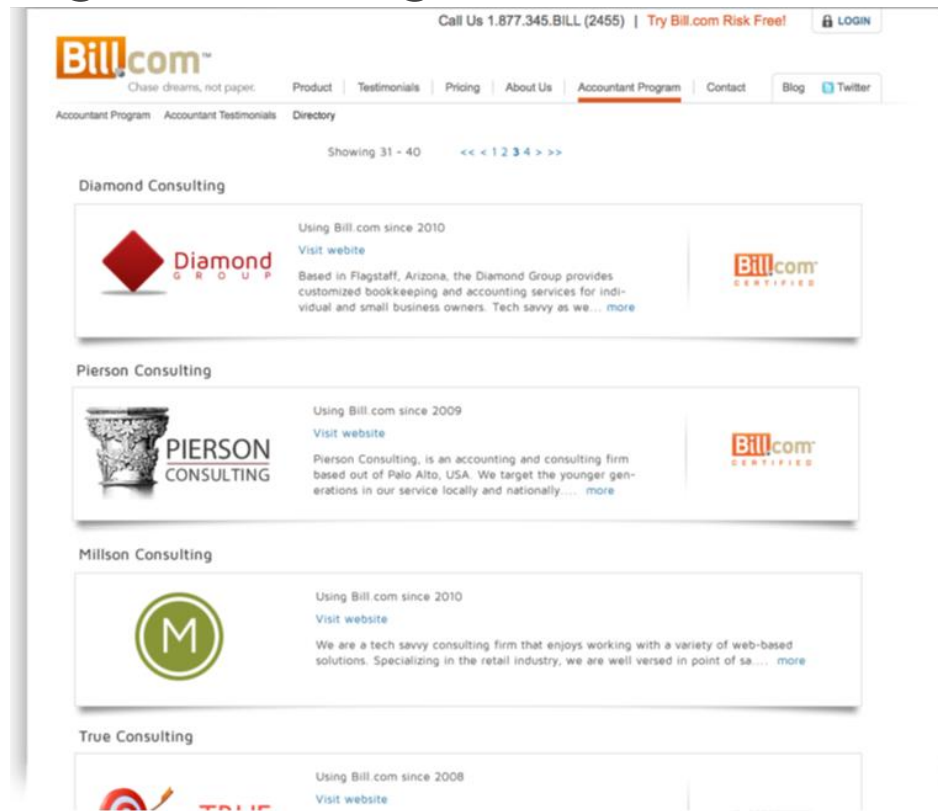


Bill.com Accountant Directory

- **What is it?**
 - A list of accounting firms who are using Bill.com
- **Who's it for?**
 - For accounting firms and businesses.
- **Why?**
 - For firms to stand out as “next generation” accounting firms
 - For businesses to discover accounting firms who can help streamline and automate their payables, receivables and cash flow.

Bill.com Accountant Directory

Accounting Firms: showcase your brand to businesses across the US looking for “next generation” accountants.



The screenshot displays the Bill.com Accountant Directory page. At the top, there is a navigation bar with the Bill.com logo and the tagline "Chase dreams, not paper." The navigation menu includes links for Product, Testimonials, Pricing, About Us, Accountant Program (which is highlighted), Contact, Blog, and Twitter. A search bar and a "LOGIN" button are also visible. Below the navigation, the page shows a list of accounting firms, with the first three being Diamond Consulting, Pierson Consulting, and Millson Consulting. Each firm's entry includes its logo, a brief description of its services, and a "Visit website" link. The "Bill.com CERTIFIED" logo is also present next to each firm's name.

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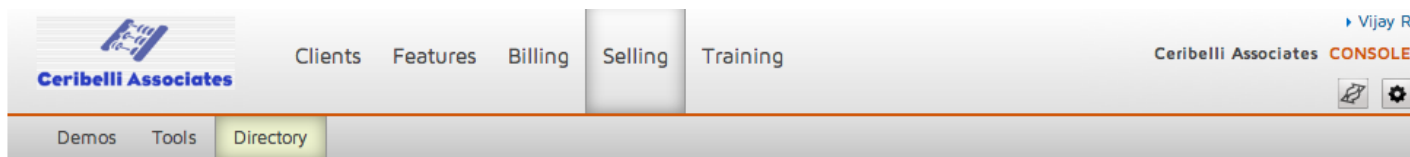
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Bill.com Accountant Directory

Manage your listing by logging to your console and clicking on Selling tab, Directory.



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Ceribelli Associates is a full-service accounting firm that has been in the heart of San Jose since 1980. Our clients range from individuals to internet startups, long-time family businesses, successful entrepreneurs, partnerships and established corporations.

We provide solutions for growth, management, and sharing of financial resources. We are advisors and counselors, as well as, accountants, tax preparers and bookkeepers - available to help you to achieve maximum success and profitability.

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