



ACCOUNTANT PRODUCT OVERVIEW

Solve client bill pay challenges efficiently and profitably.

Accounting firms using the Bill.com intelligent business payments platform save time and gain control with a streamlined end-to-end experience.

Why Bill.com?

- 1 Boost efficiency and profitability**

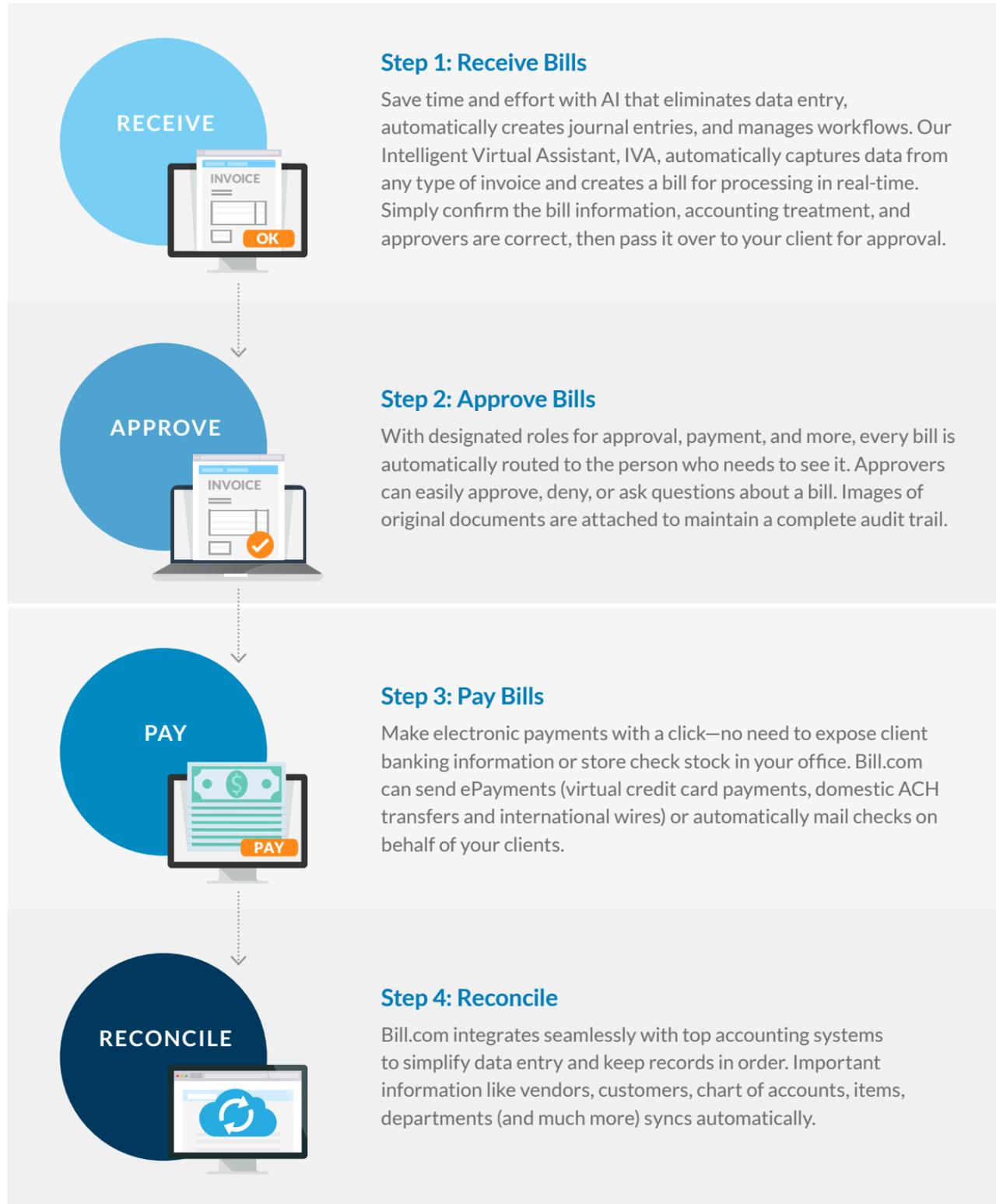
Reduce the time you spend managing client bills by at least 50%. You'll work more efficiently and increase your margins at the same time.
- 2 Deliver more value to your clients**

Give clients the simplicity and control they want while solving their AP and AR headaches with an intelligent payments platform.
- 3 Protect your clients and your firm**

Pay bills securely, without worrying about fraud. Bill.com protects you at the client and payment levels.

How it Works

Bill.com eliminates the back-and-forth between you and your clients, simplifying the process from start to finish. Here's how it works:



Bill.com Features

Entry

- ✓ Add bills via email, scan, drag-and-drop upload, or Earth Class Mail
- ✓ Import bills directly from Hubdoc and Receipt Bank
- ✓ Import expense reports directly from Expensify and Tallie
- ✓ Automatically extract invoice data to create bills with IVA
- ✓ Complete recurring transactions with Smart Data Entry
- ✓ Unlimited online document storage

Approval

- ✓ System-defined roles for clear separation of duties
- ✓ Configure custom user roles
- ✓ Require mandatory approvers
- ✓ Set approval thresholds by bill amount
- ✓ Require minimum number of approvers
- ✓ Automatically approve recurring bills for a streamlined process
- ✓ Image of original documents attached to bill
- ✓ Approvers can add notes or questions to a bill
- ✓ Approver name, date, timestamp, and notes become permanent part of transaction
- ✓ Present PO details from Sage Intacct and Oracle NetSuite to bill approvers

Payment

- ✓ Pay with ePayment (ACH transfer)
- ✓ Send international wire payments in US Dollars or local currency (select countries)
- ✓ Pay with Vendor Direct virtual credit payments
- ✓ Pay with check, sent on clients' behalf
- ✓ Link to multiple bank accounts
- ✓ Generate a payment in seconds to a known vendor, even if you don't have an invoice.
- ✓ Select future payment process dates
- ✓ Make partial payments
- ✓ Bulk pay multiple invoices at once
- ✓ Track bills paid outside of Bill.com
- ✓ Void a payment
- ✓ Schedule automatic payments for recurring bills
- ✓ Set payment limits for companies and individuals

Reconciliation

- ✓ Seamless integration with QuickBooks Online, QuickBooks Desktop, Xero, Sage Intacct, and Oracle NetSuite
- ✓ Import/export sync with MS Dynamics GP and Sage 50
- ✓ Out-of-the-box reports for bill payments, unpaid bills, vendor balances, aging, funds transfer, and transaction lists
- ✓ Create vendor 1099 forms with Tax1099 integration
- ✓ Auto-void check after 90 days
- ✓ See image of cleared checks

Security

- ✓ Strict physical security protections at Bill.com server locations
- ✓ Firewalls and intrusion-detection devices block electronic access to servers
- ✓ Data is encrypted in motion and at rest consistent with leading industry practices
- ✓ Redundant servers protect all data and ensure quick disaster recovery
- ✓ Roles and permissions limit access to data and documents—clients and accountants only see what they need to
- ✓ Payments made digitally through Bill.com keep your bank account and routing information private
- ✓ Multi-factor authentication (MFA) prevents fraudulent access to Bill.com accounts
- ✓ Bill.com uses AI for sophisticated risk assessments that protect firms and clients from business email compromises, account takeovers, fraudulent invoices and vendors, and more
- ✓ Protect against check fraud through automated Positive Pay service
- ✓ Regular completion of SOC 1 (Type 1) and SOC 2 (Type 2) audits by a reputed third-party firm
- ✓ SSL encryption certificates issued by trusted certification authorities
- ✓ All funds are FDIC-insured
- ✓ PCI DSS Compliance as a Service Provider by a Qualified Security Assessor (QSA)

EVERYTHING IN ONE PLACE

The Bill.com Accountant Console is your online center for managing bill pay, showing all your clients in a single view and giving you one-click access to every account.

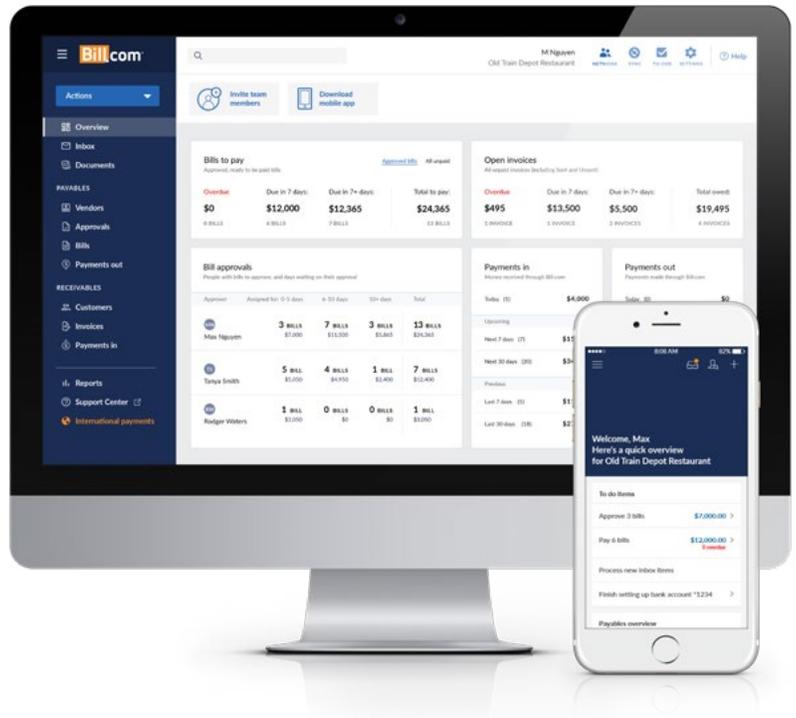
- ✓ Client account admin tools
- ✓ Master to-do list for all clients
- ✓ Staff access and login controls
- ✓ Staff training and certification tools
- ✓ Marketing, sales, and firm growth resources

Stay Connected

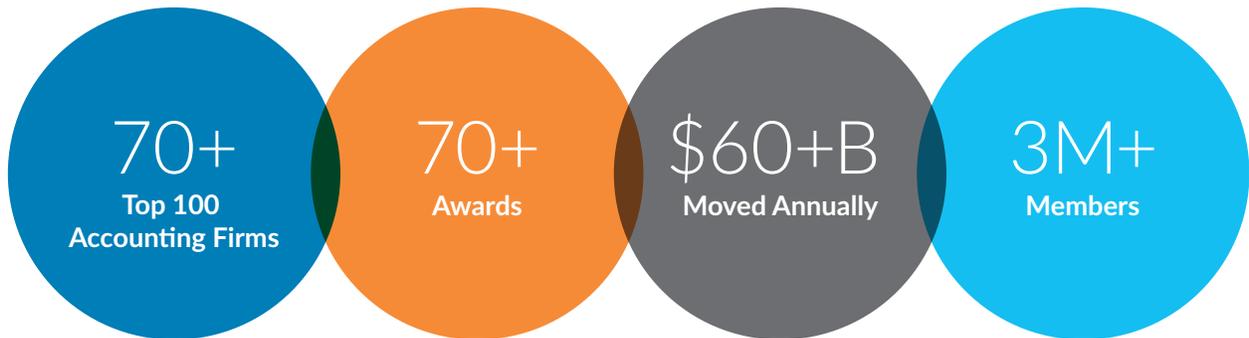
Our mobile app makes bill pay easier than ever, no matter where you are.

- Work with your clients and staff on the go
- Swipe right to approve bills, swipe left to deny
- See complete payment details with a tap of a finger
- Pay quickly and easily— even multiple bills at once!

AVAILABLE FOR iOS
AND ANDROID



A LEADER IN BUSINESS PAYMENTS



See how Bill.com works for your firm.

Request a demo or sign up for a risk-free trial at bill.com/for-accountants