**Bill.com Setup Reference Guide Part 4: Using Accounts Receivable**

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#### **Bill.com Accounts Receivable**

With Bill.com AR you can:

* Create, send, and manage invoices
* Collaborate with your team and customers
* Receive payments electronically, and set up auto-charge
* Sync both invoice and payment activity with the most popular accounting software systems

Invoices are organized by customer so you can view outstanding invoices and a complete payment history.

#### **Customizing the Receivables Experience**

Logo, Branded Website Address, and Network Profile

Your logo will be included on your company's Network profile, emails to your vendors and customers, invoices you send to customers, and the website where customers pay you.

* [Adding a Logo](https://help.bill.com/hc/en-us/articles/115005914146)

On the bottom of invoices sent through Bill.com, there will be a URL that points customers   
to where they can pay you.

* [Branded Website Address](https://help.bill.com/hc/en-us/articles/360007497171)

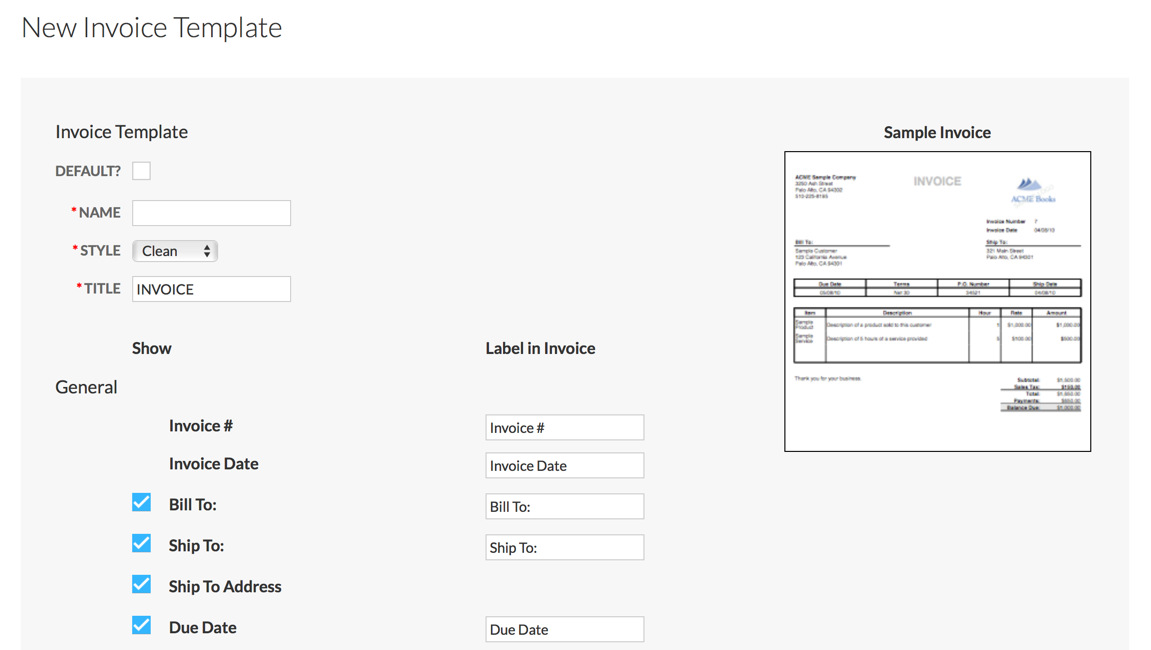
Your Network Profile is how you are represented in the Bill.com Network. Here is where you can display your business contact information, logo, and more. You can also control your profile visibility, allowing or limiting others to search for your business.

* [Network Profile Visibility Settings](https://help.bill.com/hc/en-us/articles/115005952966)

Create an Invoice Template

You can create a custom invoice template that renames fields, removes unnecessary information, and updates the appearance of invoices you send to your customers.

* [Creating a new invoice template](https://help.bill.com/hc/en-us/articles/360000023603)

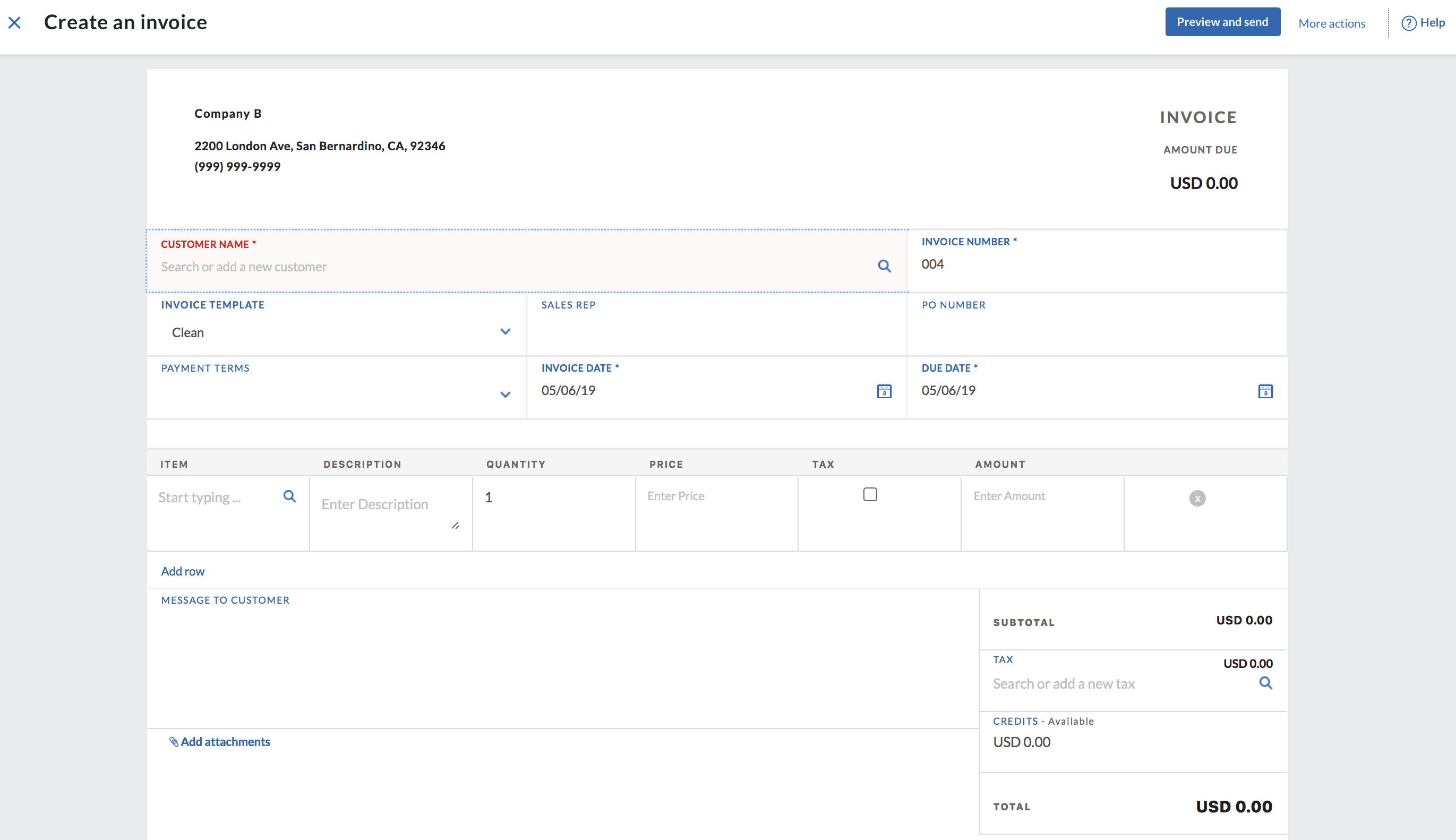


#### Creating and Sending Invoices

During the first sync with your accounting software, Bill.com will pull in your existing customers, items, and other classifications you may use when creating invoices. You can then email or send your invoices via US mail at the time of creation, or at a later date.

Invoices emailed through Bill.com will include your branded website address so the customer knows where to submit payment to you. The email they receive will also include a “Pay Online Electronically” button that points them to the branded website.

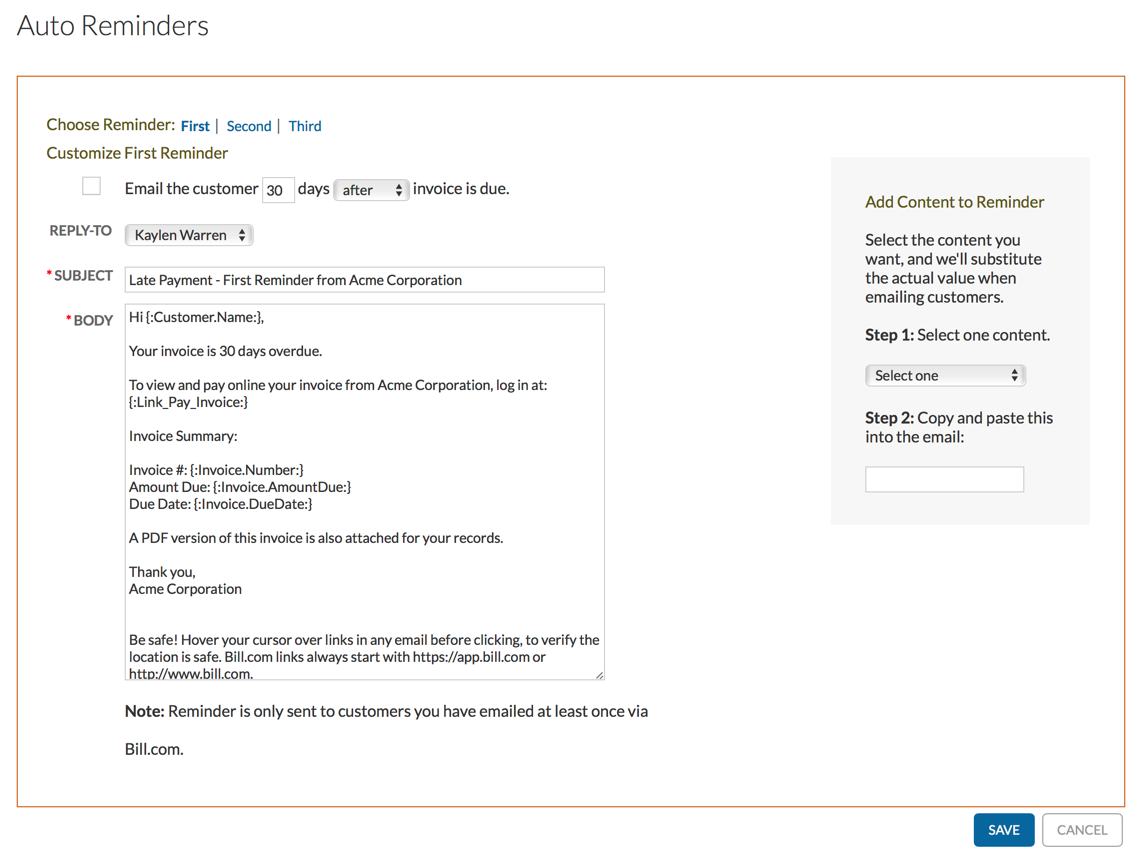
* [Enter invoice and email to customer](https://help.bill.com/hc/en-us/articles/360000022923-Enter-a-new-Invoice#enter-invoice-and-email-to-customer)
* [Enter invoice without sending](https://help.bill.com/hc/en-us/articles/360000022923-Enter-a-new-Invoice#enter-invoice-without-sending)
* [Email, mail or print an invoice](https://help.bill.com/hc/en-us/articles/360000025186-Email-mail-or-print-an-invoice)



Invoice Reminders

Establish auto reminders, or send a manual reminder, to let customers or clients know when an invoice is either past due or is coming up as due.

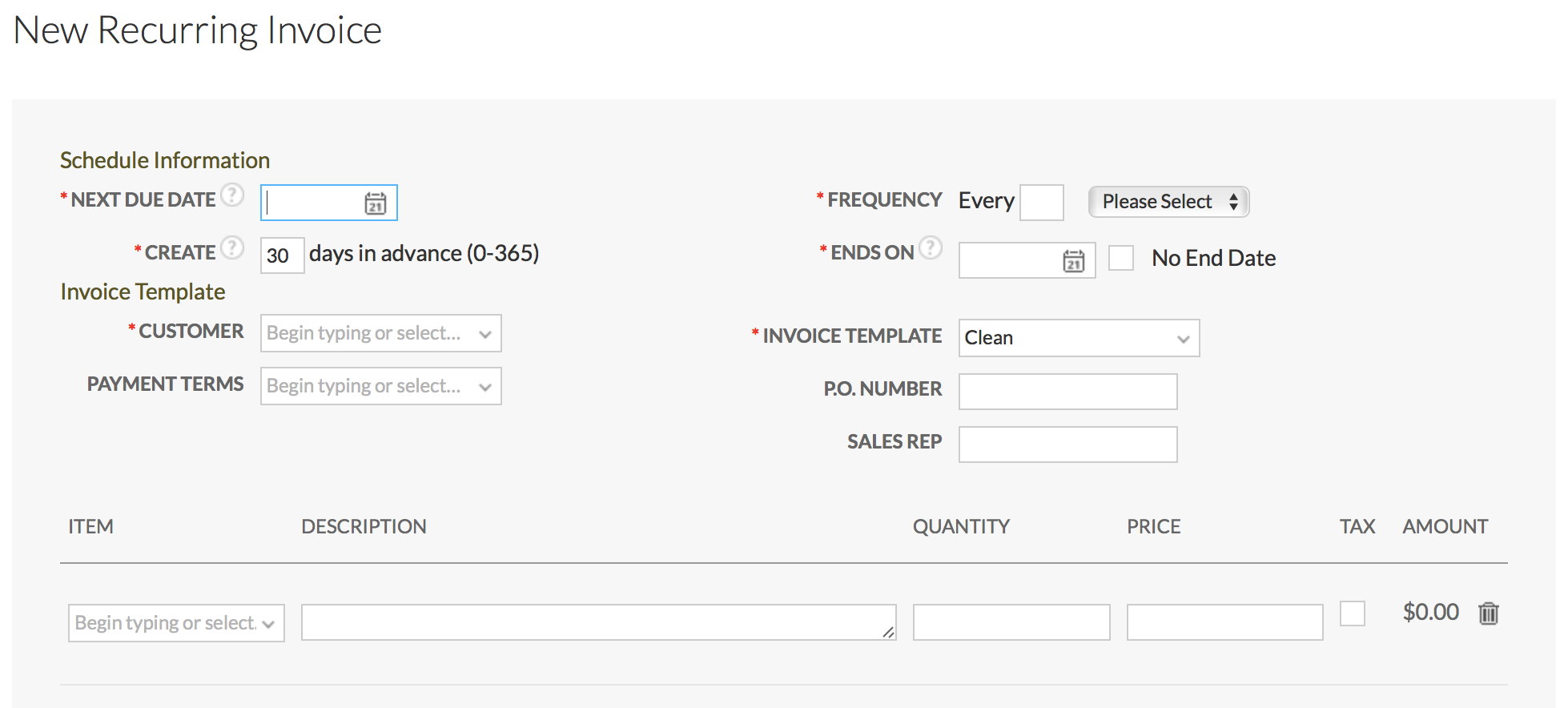
* [Reminders for Invoices](https://help.bill.com/hc/en-us/articles/360000022763-Auto-Reminders-for-Invoices#things-to-know)



Recurring Invoices

Recurring invoices allow you to automate the creation of invoices that occur regularly and are always the same amount.

* [Recurring Invoices](https://help.bill.com/hc/en-us/articles/360000022803-Creating-a-recurring-invoice)



#### **Getting Paid with Bill.com**

Payment Options

There are three methods available for receiving payments in Bill.com:

1. ePayment: $0.49 per ePayment received
2. PayPal: standard PayPal rates apply
3. Credit Card: Vantage credit card processing fees apply

For payments received via PayPal and credit card, you can choose to add a convenience fee

To enable a payment method, take the following steps:

1. Click **Settings**
2. Under Receivables, click **Online Payments**
3. Click **Setup** to the right of the desired payment method
4. Follow the setup prompts and provide any required information

* [Accepting ePayments](https://help.bill.com/hc/en-us/articles/360002013791-Accepting-ePayments)
* [Accepting credit card payments through Vantage](https://help.bill.com/hc/en-us/articles/360000022463-Accepting-credit-card-payments-through-Vantage)
* [Bill.com Receivables payments via PayPal](https://help.bill.com/hc/en-us/articles/360000024786-Bill-com-Receivables-payments-via-PayPal)

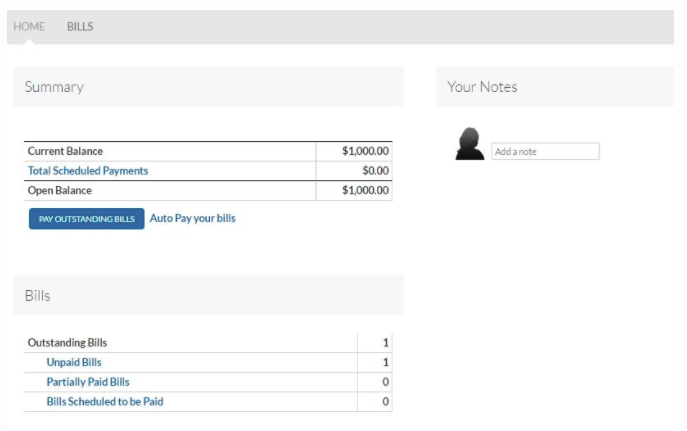
The Customer Portal

When an invoice is sent through Bill.com, it will include a link to your branded Bill.com website, also known as the Customer Portal. The Customer Portal allows customers to view and pay their invoices.

Customers will be able to choose from the payment methods you’ve enabled, and payments made through the Customer Portal will automatically be applied to the invoices on your end.

If desired, customers can also enable Auto Charge from within the Portal (see page 12).

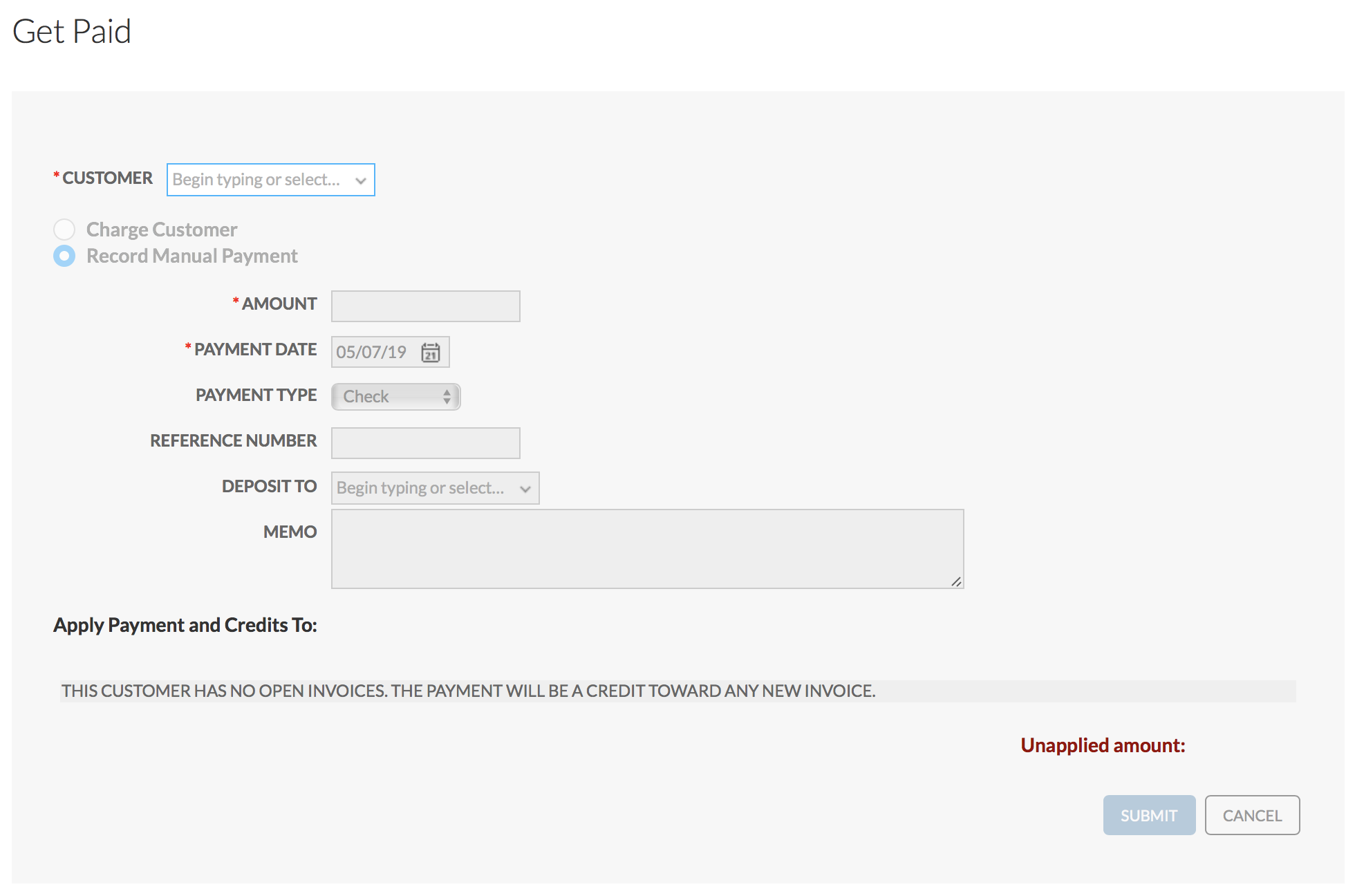
* [Receivables via the Customer Portal](https://help.bill.com/hc/en-us/articles/360000024926-Receivables-via-the-Customer-Portal)
* [Portal accounts: what the customer sees](https://help.bill.com/hc/en-us/articles/360000022643-Portal-accounts-what-the-customer-sees/)



Charging a Customer

You can also charge a customer directly from your end if there is a payment method setup for them.

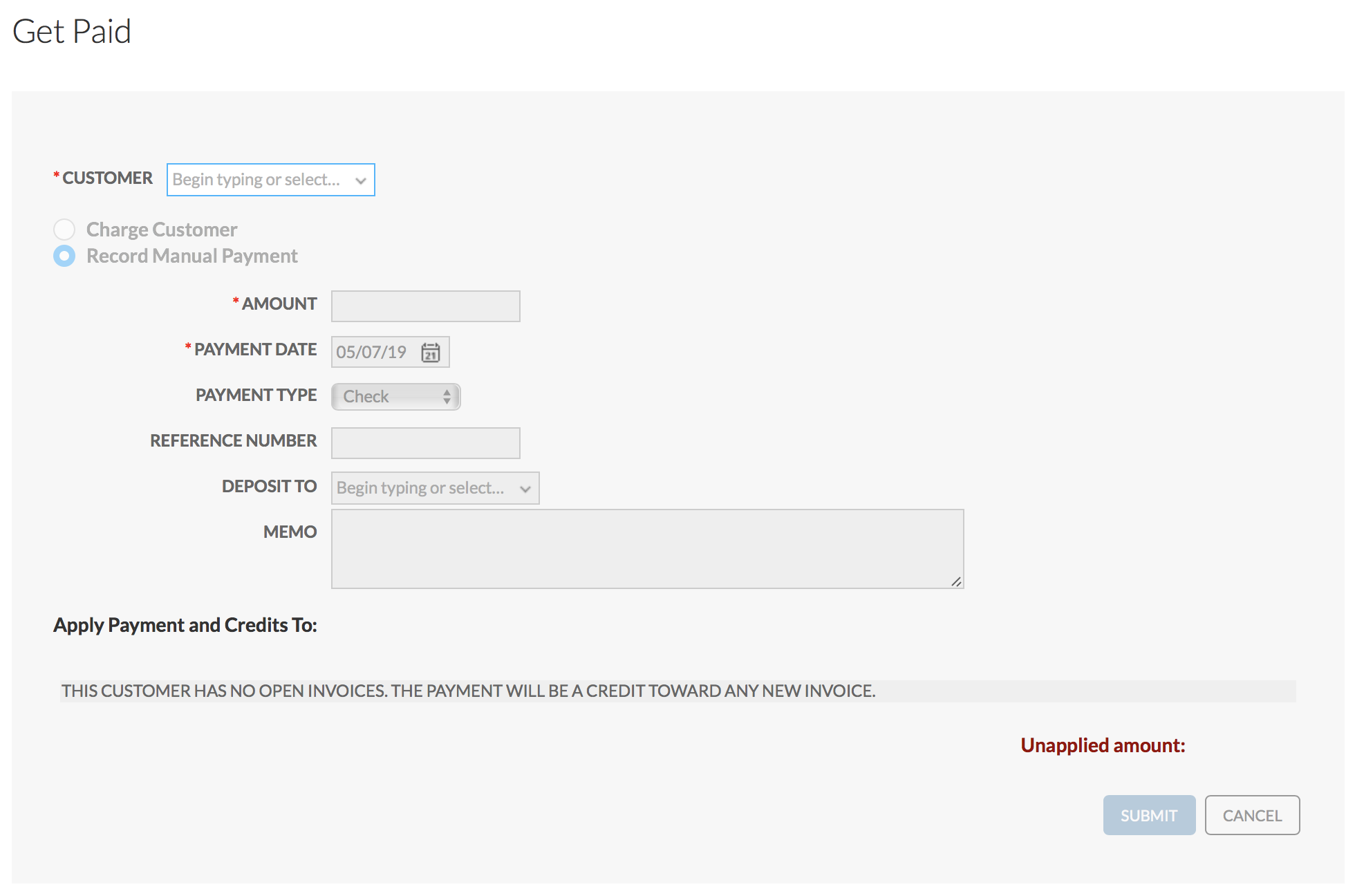
* [Getting signed authorization from customers](https://help.bill.com/hc/en-us/articles/360000022583-Getting-signed-authorization-from-customers)
* [Updating a customer's credit card information through Vantage](https://help.bill.com/hc/en-us/articles/360000024946-Updating-a-customer-s-credit-card-information-through-Vantage)
* [Adding a customer's bank account](https://help.bill.com/hc/en-us/articles/360000024486-Adding-a-customer-s-bank-account)
* [Charging a customer](https://help.bill.com/hc/en-us/articles/115005970006-Charging-a-customer)



Recording Payments Received Outside of Bill.com

If you receive a customer payment outside of Bill.com, you can still record the payment information in Bill.com

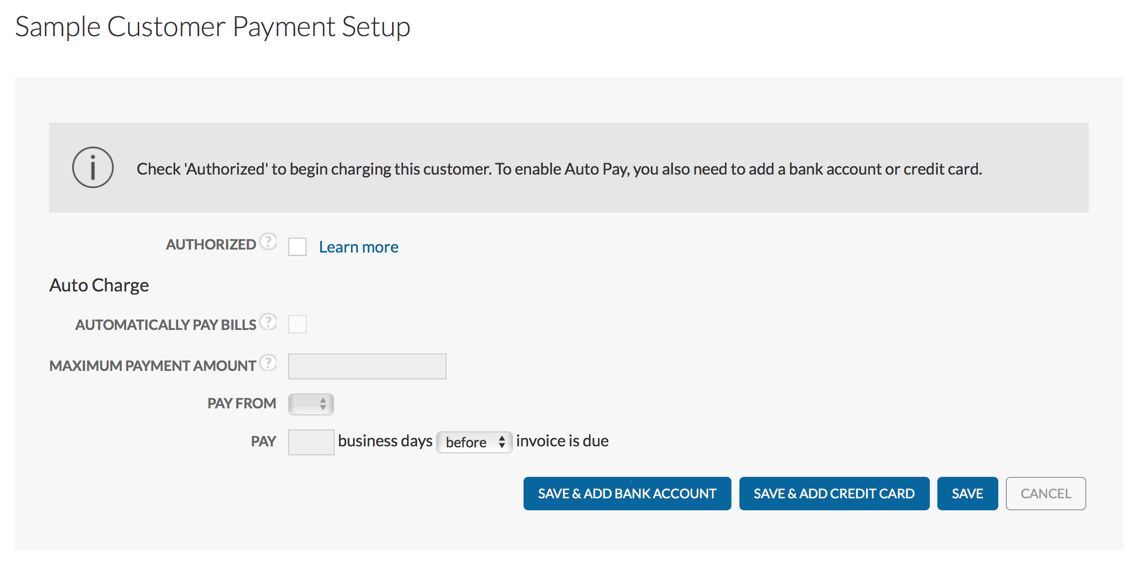
* [Record a manual payment on an invoice](https://help.bill.com/hc/en-us/articles/360000023383-Record-a-manual-payment-on-an-invoice)



Auto Charge

Auto Charge allows you to automatically charge customers for their open invoices. **Tip**: Set up recurring invoices to be automatically created by the system then Auto Charge can take care of the rest!

* [Auto Charge for Customers](https://help.bill.com/hc/en-us/articles/115005970086-Auto-Charge-for-Customers)

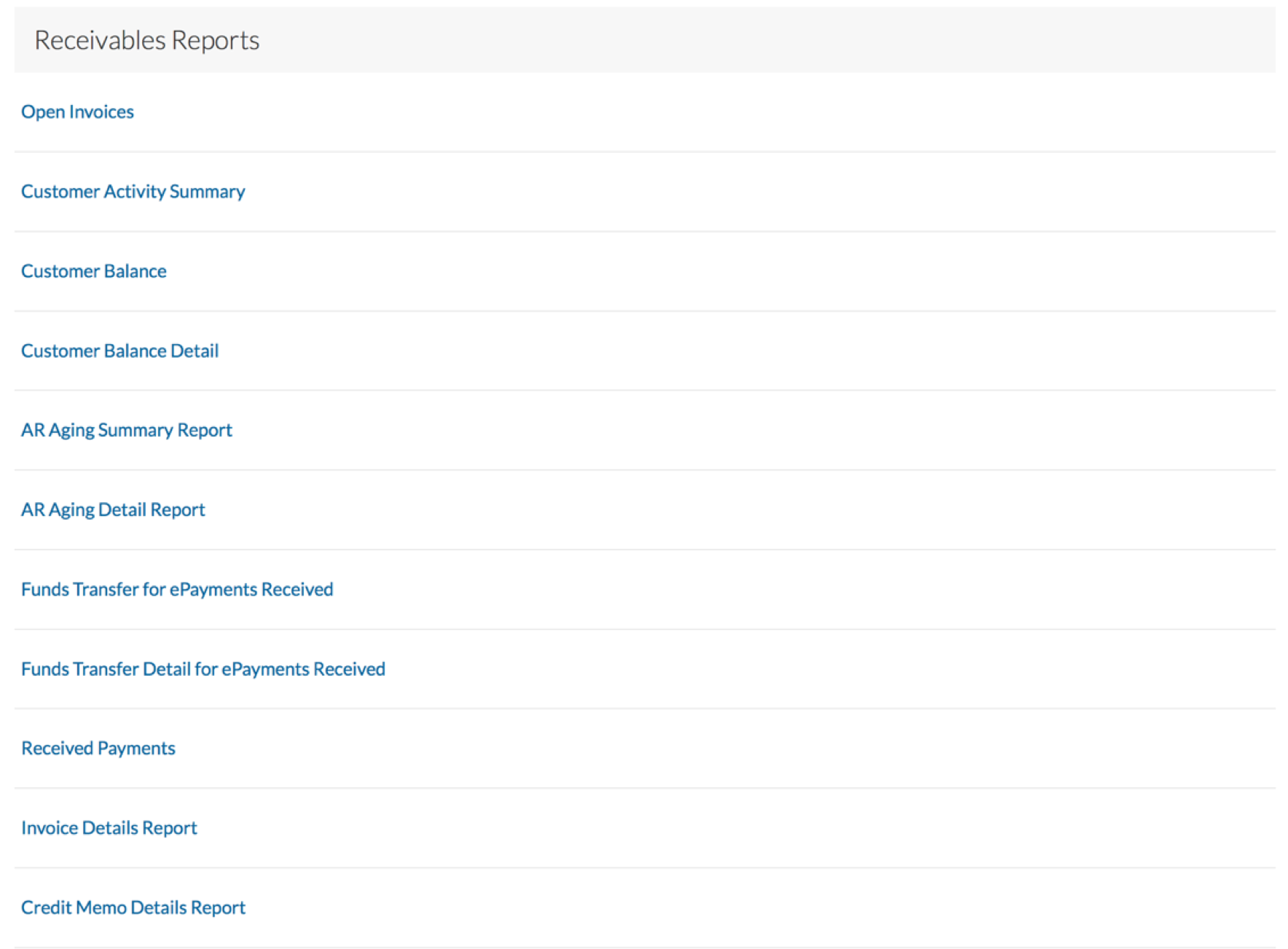


#### Reporting

Bill.com offers several reports to assist with managing your Receivables

For more complex reporting needs, you’ll use your accounting software   
as it allows for greater customization

* [Reports Overview](https://help.bill.com/hc/en-us/articles/360000023723-Reports-Overview)



#### The Bill.com Mobile App – Managing Receivables

**The Bill.com mobile app is available for both   
iOS (Apple) and Android devices**

* Allows you to work on the go and keep   
  your back office in your back pocket
* Manage customers and items
* Create invoices with ease
* Keep track of payments received
* And more…
* [Bill.com Mobile App for Android](https://help.bill.com/hc/en-us/articles/115005898163-Bill-com-Mobile-App-for-Android)
* [Bill.com Mobile App for iOS](https://help.bill.com/hc/en-us/articles/115005914906-Bill-com-Mobile-App-for-iOS)

#### **Contacting Support for Receivables Help**

Support can be accessed from the bottom of the left panel in Bill.com

* Self-service articles (available 24/7)
* Chat (weekdays from 5 am to 6 pm PT)
* Email (response within 1-2 business days)

