Setting Up Clients in the Bill.com Console

Overview

The client setup process

Once your firm's console is set up, it only takes **three** steps to set up a client on Bill.com.

Step 1

Add a client to your console

Step 2

Complete the startup checklist

Step 3

Customize preferences for your client

Client setup checklist

To set up clients efficiently, gather all the information you need before you begin.

Step 1: Add a client to your console

- Company name and address information
- Accounting software used and access to the file

Step 2: Complete the Startup Checklist

- Client's custom Bill.com Inbox email address
- Names and emails of users who will enter, approve, and pay bills

Step 3: Customize preferences for your client

- Client's bank account information for payments
- Client's credit card information for billing

Step 1 – Adding a client to the console

Adding clients to your console is quick and easy. The more clients you have using Bill.com, the more time you'll have to **focus on your highest value services**

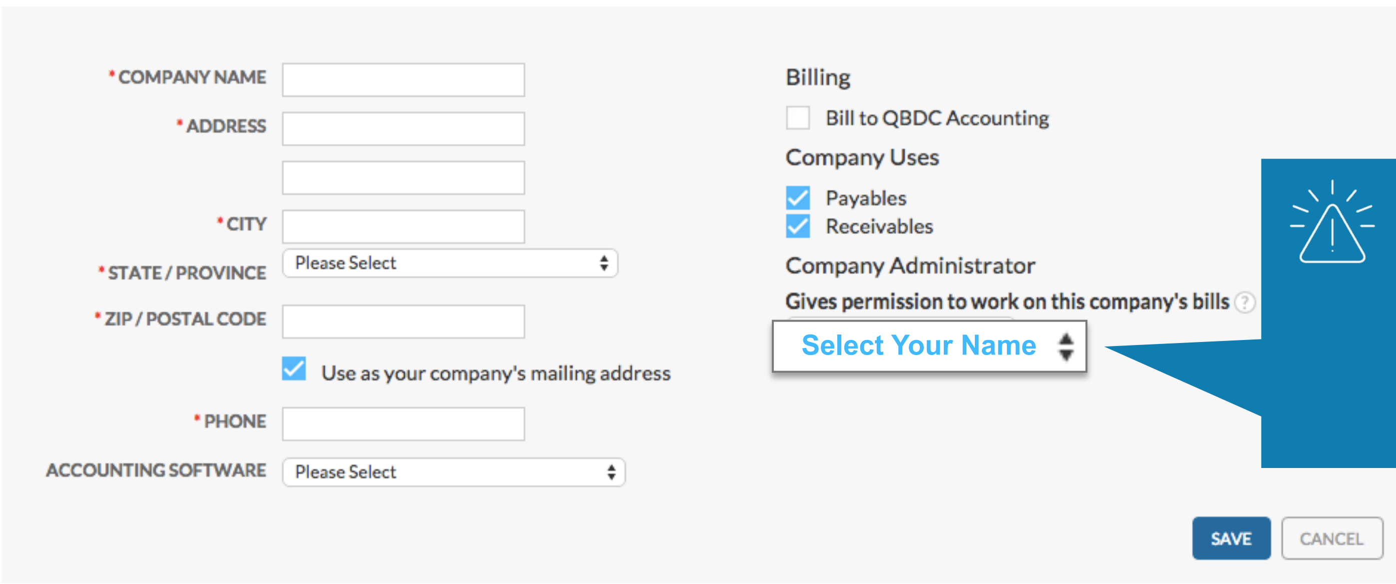
Add a client to your console

Complete the startup checklist

Customize preferences for your client

Adding clients

1. Select the **Clients** tab.
2. Click the **Add Client Company** button.
3. Enter your client's information.
4. Check the **Bill to** checkbox if you want Bill.com to charge your firm for the fees incurred by your client. If not checked, we bill the client directly.
5. Click **Save**.



IMPORTANT
The Administrator should be you. If it is not, you will not be able to access the account to set it up.

Making features available to clients

1. After adding the client, click the **Features** tab.
2. Click **Payables**, **Receivables**, **Data Entry Service**, and/or **Pay Faster**.
3. For each client company and feature, click [**Use it]** to enable the feature.

All Eights	No	[Use it]
Alpha (QBO) Company	No	[Use it]
Amber's Flower Shop	No	[Use it]
Amber's Test	No	[Use it]
Amelia's Test Company	No	[Use it]

Step 2 –The startup checklist

Bill.com setup is a breeze and should take you less than an hour. This is because we pull most of the information needed to populate your client's account from your accounting software.

Add a client to your console

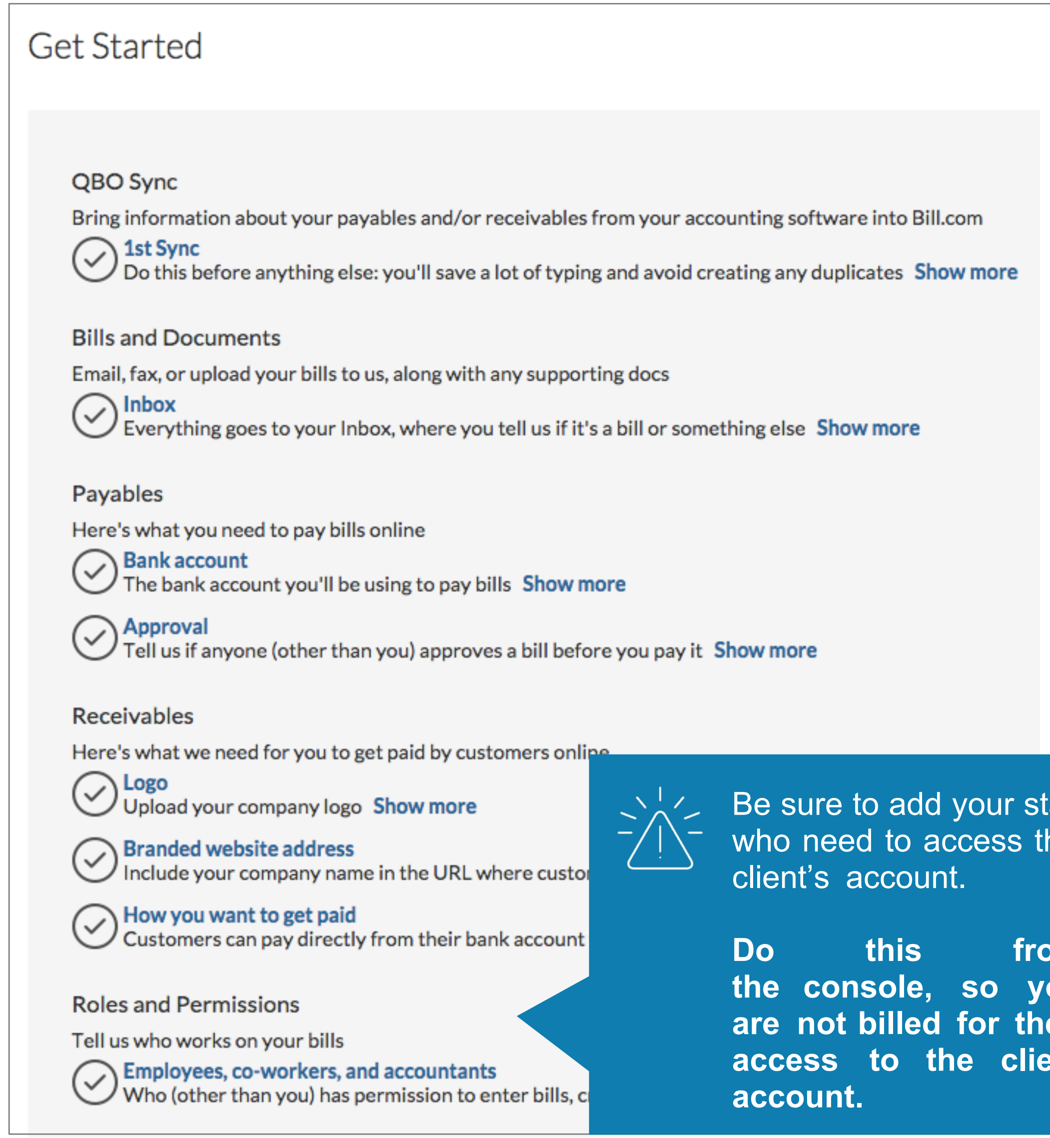
Complete the startup checklist

Customize preferences for your client

Startup checklist

1. Access each client's Bill.com account by clicking your name at the top right of every Bill.com page for a list.
2. Within each account, click the **Gear** icon > **Startup Checklist**.
3. Click applicable items to complete the setup tasks for each feature.

The Startup Checklist will display what you have completed and the remaining tasks.



Be sure to add your staff who need to access this client's account.

Do this from the console, so you are not billed for their access to the client account.

Step 3 – Customize preferences

Customize the account based on your and the client's preferences.

Add classes (departments), customers, jobs, and items fields to bills, and determine if vendors will get one single payment or separate payments for multiple bills for the same vendor.

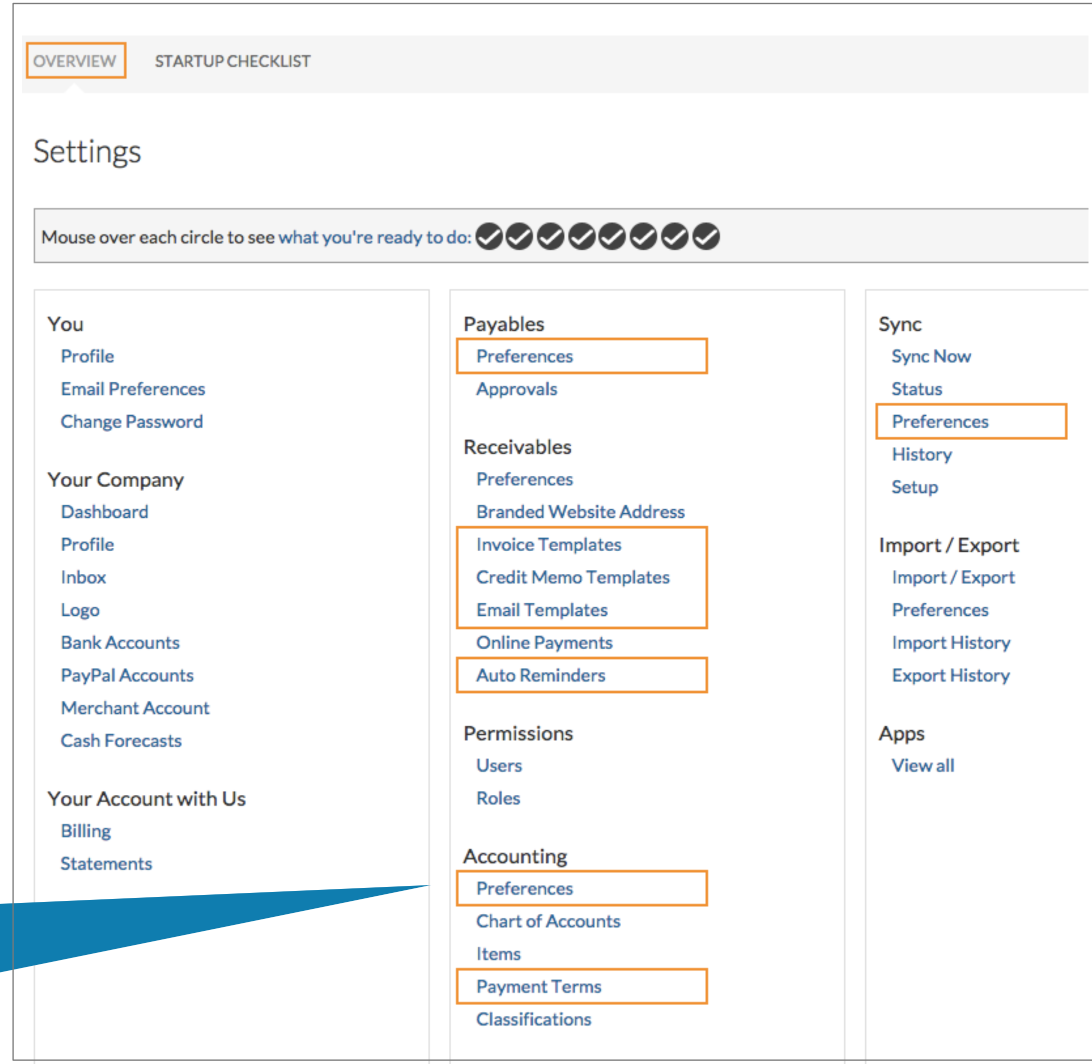
Add a client to your console

Complete the startup checklist

Customize preferences for your client

Customize preferences

1. Within each account, click the **Gear** icon > **Settings**.
2. Click to set up **Preferences** for each feature group.



Accounting preferences differ based on settings for sync. Refer to support.bill.com for more info about syncing with your clients' accounting software.


Thanks
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