



# 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**.

**\* COMPANY NAME**

**\* ADDRESS**

**\* CITY**

**\* STATE / PROVINCE**

**\* ZIP / POSTAL CODE**

☒ Use as your company's mailing address

**\* PHONE**

**ACCOUNTING SOFTWARE**

**Billing**

☐ Bill to QBDC Accounting

**Company Uses**

☒ Payables

☒ Receivables

**Company Administrator**

Gives permission to work on this company's bills ?

Select Your Name

**SAVE** **CANCEL**



**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.

## Get Started

### QBO Sync

Bring information about your payables and/or receivables from your accounting software into Bill.com



#### 1st Sync

Do this before anything else: you'll save a lot of typing and avoid creating any duplicates [Show more](#)

### Bills and Documents

Email, fax, or upload your bills to us, along with any supporting docs



#### Inbox

Everything goes to your Inbox, where you tell us if it's a bill or something else [Show more](#)

### Payables

Here's what you need to pay bills online



#### Bank account

The bank account you'll be using to pay bills [Show more](#)



#### Approval

Tell us if anyone (other than you) approves a bill before you pay it [Show more](#)

### Receivables

Here's what we need for you to get paid by customers online



#### Logo

Upload your company logo [Show more](#)



#### Branded website address

Include your company name in the URL where customers can pay



#### How you want to get paid

Customers can pay directly from their bank account

### Roles and Permissions

Tell us who works on your bills



#### Employees, co-workers, and accountants

Who (other than you) has permission to enter bills, create invoices, and manage payments



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.

A modern office hallway with glass walls and doors. The floor is polished and reflects the overhead lights. In the background, people are working at desks. The overall atmosphere is professional and bright.

# Thanks

**Bill.com**<sup>®</sup>

Magically Simple Business Payments