

The Approver

Introduction

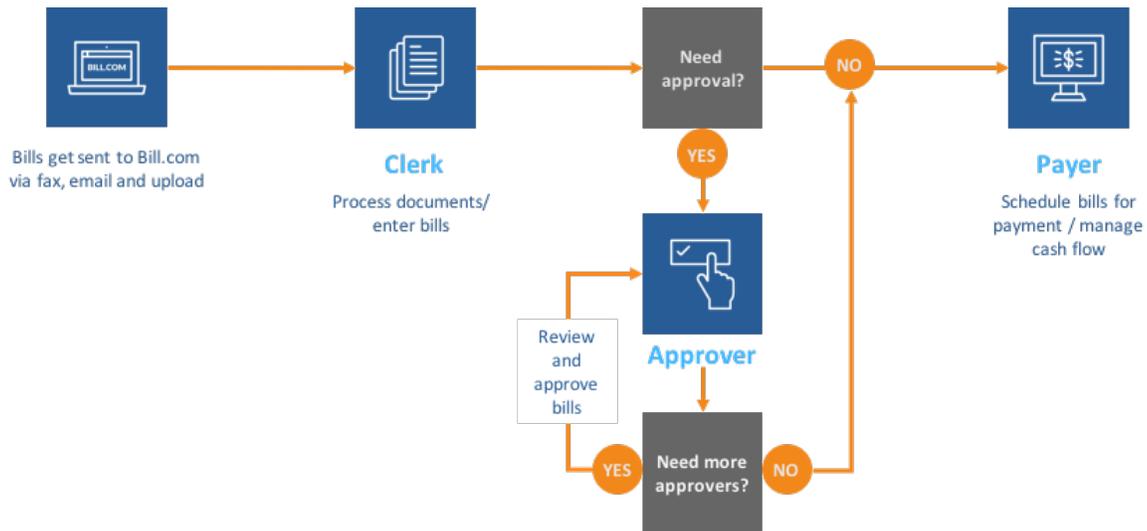
Welcome to Bill.com. We make it simple to connect and do business.

Now you can streamline and automate the bill payment process.

Responsibilities of the Approver Role

Review and approve bills and vendor credits.

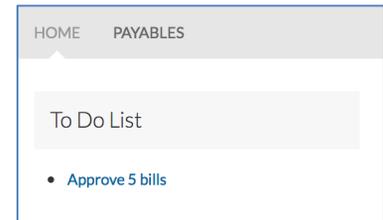
Where the Approver fits in the accounts payable workflow



Approving bills

To Do List

When you log in, your **To Do List** will show bills that are ready for you to approve. Click the link in the To Do List to review the bills.



Reviewing and approving bills

Spencer Farms
18 Country Road
Taylorsville, Indiana 46107
812-345-1998
Fax 812-345-5472
Orders@SpencerFarms.com

TO: Old Train Depot Restaurant
11 Commerce Blvd.
Indianapolis, IN 46163
317-545-6787
Customer ID 180

QUANTITY	ITEM #	DESCRIPTION	UNIT PRICE	DISCOUNT
15 Gallon	42	Milk	\$5.00	
20 Dozen	3	Eggs	\$6.25	
12.5 Pounds	12	Butter	\$2.00	
10 Pounds	56	Cheddar Cheese	\$7.50	

Approve Bill

VENDOR: Spencer Farms
INVOICE #: 2018-03-20 (Last 5 bills)
INVOICE DATE: 03/20/18
DUE DATE: 03/20/18
BILL AMOUNT: \$300.00
APPROVED AMOUNT: \$0.00
DESCRIPTION: Recurring Bill Milk, cream, butter, cheese, eggs

Expenses - \$300.00
Account: 5100 Cost of... Amount: \$300.00 Department: []

Description: []

Approvers - 1
1 Michelle Schiffer (Waiting 03/09/18 10:04 PM)

+ Add More Approvers

NOTE/MESSAGE: []

APPROVE DENY CANCEL

To approve or deny an individual bill:

1. In the **Review** column, click the review icon:
2. On the **Approval** page, select **Approve** or **Deny**.

To approve or deny several bills sequentially:

1. Next to bills, click **Slide Show Approval**.
2. On the **Approval** page, select **Approve**, **Deny**, or **Skip**.

To approve several bills at once:

1. In the **Select** column, select several bills with the checkboxes.
2. Click **Approve**.
3. On the **Confirmation** dialog box, click **OK**.

Reviewing and approving bills with your mobile device

Mobile apps for Apple and Android devices

1. Download the free Bill.com app in the app store.
2. Log in.
3. On your Dashboard, you'll see a quick view of bills you need to approve, grouped by due date.
4. Click on one of the groups to approve bills.

Approving bills

Quick approval: Simply swipe a bill on the list to the right.

For more details about the bill:

1. Click a bill on the list to view details.
2. Click Approve at the bottom of the bill.

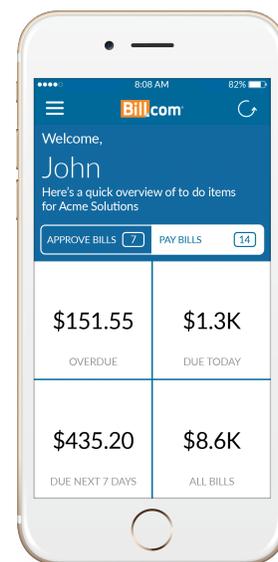
Denying bills

Quick deny:

1. Swipe the bill to the left.
2. Add a note explaining why you denied the bill.

For more details about the bill:

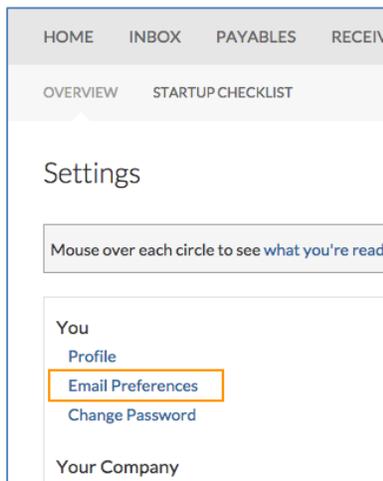
1. Click a bill on the list to view details.
2. Click Deny at the bottom of the bill.
3. Add a note explaining why you denied the bill.



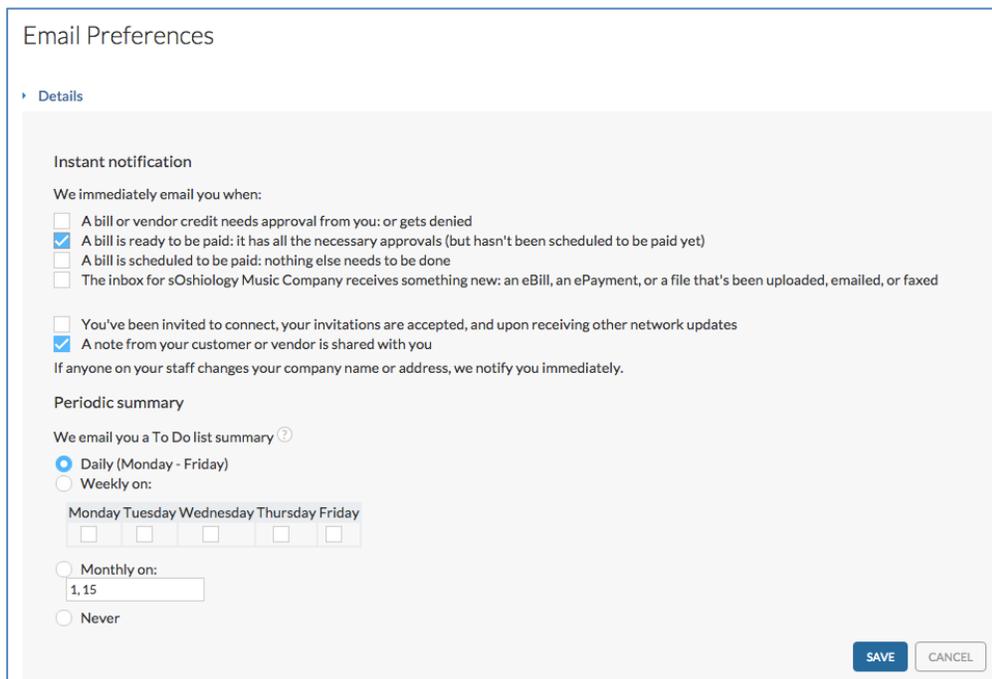
Setting your personal email notification preferences

You can choose how often you would like to receive email reminders and alerts.

1. Select **Gear** icon > **Settings** > **Overview**.
2. In the **You** section, select **Email Preferences**.



3. Select the edit icon  then select/deselect your preferences.
4. **Save** your changes.



The screenshot shows the 'Email Preferences' page. It has a 'Details' section. Under 'Instant notification', there are four checkboxes: 'A bill or vendor credit needs approval from you: or gets denied' (unchecked), 'A bill is ready to be paid: it has all the necessary approvals (but hasn't been scheduled to be paid yet)' (checked), 'A bill is scheduled to be paid: nothing else needs to be done' (unchecked), and 'The inbox for sOshiology Music Company receives something new: an eBill, an ePayment, or a file that's been uploaded, emailed, or faxed' (unchecked). There are also two checkboxes for network updates: 'You've been invited to connect, your invitations are accepted, and upon receiving other network updates' (unchecked) and 'A note from your customer or vendor is shared with you' (checked). Below this is a note: 'If anyone on your staff changes your company name or address, we notify you immediately.' Under 'Periodic summary', there is a question mark icon and a note: 'We email you a To Do list summary'. There are three radio button options: 'Daily (Monday - Friday)' (selected), 'Weekly on:', and 'Monthly on:'. The 'Weekly on:' option has a row of checkboxes for Monday, Tuesday, Wednesday, Thursday, and Friday. The 'Monthly on:' option has a text input field with '1, 15' and a 'Never' option. At the bottom right, there are 'SAVE' and 'CANCEL' buttons.