

1810 EMBARCADERO RD. PALO ALTO, CA 94303

# **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**

Approve Bill         VENDOR Spencer Farms         18 Country Road         19 Country Road         11 Commerce Bivd.         11 Commerce Bivd.         12-345-9787         Orders@SpencerFarms.con         Description         Recurring Bill Milk, cream, butter, chr         1000/18         DELIVERY         PAYMENT         15 Gallon         20 Dozen         30 Dozen         31 Ferse         1006/18										
VENDOR         Spencer Farms           18         Country Road           11         Commerce Bivd.           12         Contant Restaurant           11         Contant Restaurant           11         Contant Restaurant           11         Contant Restaurant           12         Contant Restaurant           13         Contant Restaurant           11         Second Restaurant           11         Second Restaurant           1106/18         Los Cont           11         Second Restaurant           1006/18         Second Restaurant           100								Approve Bill		
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#### To approve or deny an individual bill:

- 1. In the **Review** column, click the review icon:  $\square$
- 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**.

HOME PAYABLES
To Do List
Approve 5 bills



## 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**.

HOME	INBOX	PAYABLES	RECEIV
OVERVIEW	START	UP CHECKLIST	
Setting	gs		
Mouse ov	er each circ	cle to see what y	ou're read
You			
Profile			
Email P	references		
Change	Password		
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- 3. Select the edit icon <sup>I</sup> then select/deselect your preferences.
- 4. Save your changes.

Email Preferences
Details
Instant notification
We immediately email you when:
<ul> <li>A bill or vendor credit needs approval from you: or gets denied</li> <li>A bill is ready to be paid: it has all the necessary approvals (but hasn't been scheduled to be paid yet)</li> <li>A bill is scheduled to be paid: nothing else needs to be done</li> </ul>
The inbox for sOshiology Music Company receives something new: an eBill, an ePayment, or a file that's been uploaded, emailed, or faxed
You've been invited to connect, your invitations are accepted, and upon receiving other network updates V A note from your customer or vendor is shared with you
If anyone on your staff changes your company name or address, we notify you immediately.
Periodic summary
We email you a To Do list summary $\odot$
<ul> <li>Daily (Monday - Friday)</li> <li>Weekly on:</li> </ul>
Monday Tuesday Wednesday Thursday Friday
Monthly on: 1,15
○ Never
SAVE