

# AHCCMC's Guide to Bill.com



# THIS GUIDE WILL COVER...

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- Bill.com Contact Form
  - Creating an account
  - Setting up your account
  - Navigating Bill.com
  - Changing your settings
  - Contacting Bill.com
- 

# BILL.COM CONTACT FORM IN FLUIDREVIEW

We need to confirm that we are using your preferred email address to send the Bill.com email invitation.

This is the email address that will be used to create a Bill.com account or connect your existing account.

## Bill.com Contact Form

Submit this form no later than **October 2, 2020 at 11:59 p.m.** We highly encourage you to download a copy of this form for your own records.

### About Bill.com

AHCMC has transitioned to a paperless payment process to ensure safety and health during a pandemic. **All AHCMC staff is working remotely until further notice. Please do not mail or hand-deliver any paperwork to the AHCMC office.**

Bill.com is an online system that allows AHCMC to send secure ACH payments to grantees. You will receive an email invitation to set up an account. An account **must** be set up for you to receive FY21 funds.

- Access AHCMC's Bill.com guide [here](#)
- View AHCMC's online tutorial [here](#)

### Contact Information

Please verify the information and email below.

**PLEASE NOTE: This is the email that will be used to set up your Bill.com account.**

If you already use Bill.com, please enter that information and email below.

\*Contact Name:

\*Phone Number:

\*Email:

After you hit "Save & Exit" on this page, be sure to hit the blue "**Submit Your Grant Agreement**" button on the next page!

Save & Continue Editing

Save & Exit

# THE BILL.COM INVITATION

**The Bill.com email invitation is not an automatic process.**

Once you submit the Award Agreement and Bill.com Contact Form, **it may take up to a week to receive the email invitation** to create a new account or connect your existing Bill.com account.

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# THE BILL.COM EMAIL INVITATION

You must receive and accept an email invitation from AHCMC to receive award funds.

Click the blue "Accept Invitation" button in the email to get started.

Arts & Humanities Council of Montgomery County wants to pay you



The Bill.com Team <notificationonly@hq.bill.com>  
To ● Ana-Alicia Ih-Tzai Feng



Thu 7/9/2020 9:09 AM



Please accept this invitation from Arts & Humanities Council of Montgomery County to start receiving electronic payments directly to your bank account. This is our preferred method for making payments, and it's completely free to you.

This way, Ana-Alicia Feng gets paid much faster, and all invoice details will be available online in your free account for quick and anywhere access, helping you cut down on paperwork.

And don't worry, your account information will be secure, protected with end-to-end encryption, and not visible to Arts & Humanities Council of Montgomery County. If you have any questions, please send me an email at [kayem@arrowbookkeeping.com](mailto:kayem@arrowbookkeeping.com) or call me at 301-587-4849.

Ready to get started?



If the button above doesn't work, copy and paste the following link into your web browser:

<https://app.bill.com/inviteSignup?invite=BCBD2B35F6C8257B3A9C7C3656B8B08B07BB442B044469F56081EE48C13A0529&sg=3a0ab763-854f-48e0-89e8-49baae6cb743>

Using this link will ensure that your account is created quickly and accurately. This custom URL was generated just for Ana-Alicia Feng by Arts & Humanities Council of Montgomery County and will connect you to Arts & Humanities Council of Montgomery County.

If you have any questions about getting paid through Bill.com, please contact Arts & Humanities Council of Montgomery County at [kayem@arrowbookkeeping.com](mailto:kayem@arrowbookkeeping.com) or 301-587-4849.  
Thank you,

Kaye McCally on behalf of Arts & Humanities Council of Montgomery County

For your security, double check all email links before clicking them to make sure they're safe. Our links always start with <https://app.bill.com>, <http://www.bill.com> or <http://www.cashflow.bill.com>. Be cautious when sharing your information by email or phone.

Please don't reply to this automated email.

# THE BILL.COM INVITATION

## What if I already have an account?

If you already have a Bill.com account, Bill.com will detect whether the invite was sent to the same email address you use to log into your account.

- After clicking “Accept Invitation” you'll just need to sign into your existing account, and you'll be connected instantly.
- 
- 

# CREATING AN ACCOUNT

Enter the required fields (name, email, and create a password) and click the blue "Create Account" button to continue.

If you already have an account, click "Sign in here" in the upper right-hand corner.



[Already have a Bill.com account? Sign in here](#)

## Create an account to get paid

First name  Last name

Email

Password

Use upper and lower case letters  
Use a number or symbol  
Use 8 or more characters

Creating an account means you agree to the Bill.com General Terms of Service, Privacy Notice and Consumer Privacy Notice

# ACCOUNT SETUP: SECURITY

Enter a **primary phone number** for 2-step verification in addition to your username and password.

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## Security

To protect your account we require your password and phone when you login. [Learn more](#)

Receive code by

Text  Phone Call

Phone number

Send code

# ACCOUNT SETUP: SECURITY

You will be prompted with a text or a voice message to enter a code upon logging in to Bill.com.

The next time you login, checking the “Trust this device for 30 days” box will reduce the need of using a code to every 30 days.



## Confirm your code

Enter the code we sent to your phone

Confirmation code

[Back](#)

[Submit](#)

# A NOTE ABOUT 2-STEP VERIFICATION

Even on devices that you have marked as trusted, these other actions also prompt 2-step verification codes:

- Changing your password
  - Changing your phone number(s)
  - Accessing Bill.com on a different browser
  - Changes to your browser, such as:
    - Disabling browser cookies, using a cookie management extension, or clearing browser data
    - Changing the browser supported language, i.e.: adding a new language
    - Upgrading to a different version of the browser
-

# A NOTE ABOUT ACCOUNT SETUP

During your account set up, Bill.com may ask you required questions about:

- Industry Type
- Business Type
- Accounting Software
- Company Owner

**Fill this out to the best of your abilities. This information is for Bill.com's internal use only, and will have no effect on your account, or on your account's ability to receive grant disbursements.**

After your account setup, you can change your responses to these questions in Settings.

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# ACCOUNT SETUP: ORGANIZATIONS /GROUPS

If you are an organization/group award recipient, pick "I'm with a business."

**DO NOT** pick "I'm an employee."

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What's your relationship to Arts & Humanities Council of Montgomery County?

This will help make sure you get paid properly.

- I'm with a business**  
You are a separate business getting paid by Arts & Humanities Council of Montgomery County.
- I'm an independent contractor**  
You are a 1099 or similar being paid by Arts & Humanities Council of Montgomery County.

- I'm an employee**  
You are a W-2 employee of Arts & Humanities Council of Montgomery County.

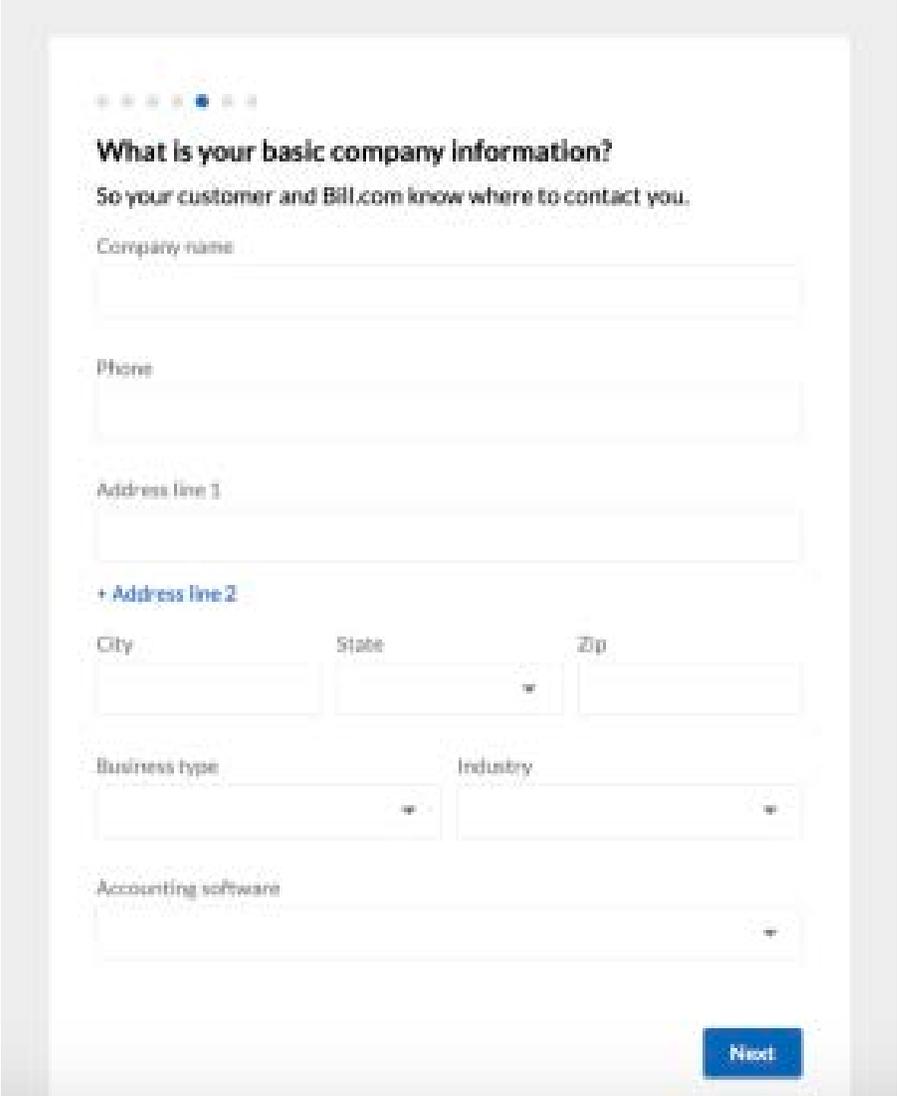
[I'm none of the above](#)

[Next](#)

# ACCOUNT SETUP: ORGANIZATIONS /GROUPS

Enter the required fields and  
click “Next.”

“Business type,” “Industry,” and  
“Accounting software” are for  
Bill.com’s internal use and will  
have no effect on your account.  
You can change your answers  
after set up.



Progress indicator: 1 of 5 steps completed.

**What is your basic company information?**  
So your customer and Bill.com know where to contact you.

Company name

Phone

Address line 1

+ Address line 2

City  State  Zip

Business type  Industry

Accounting software

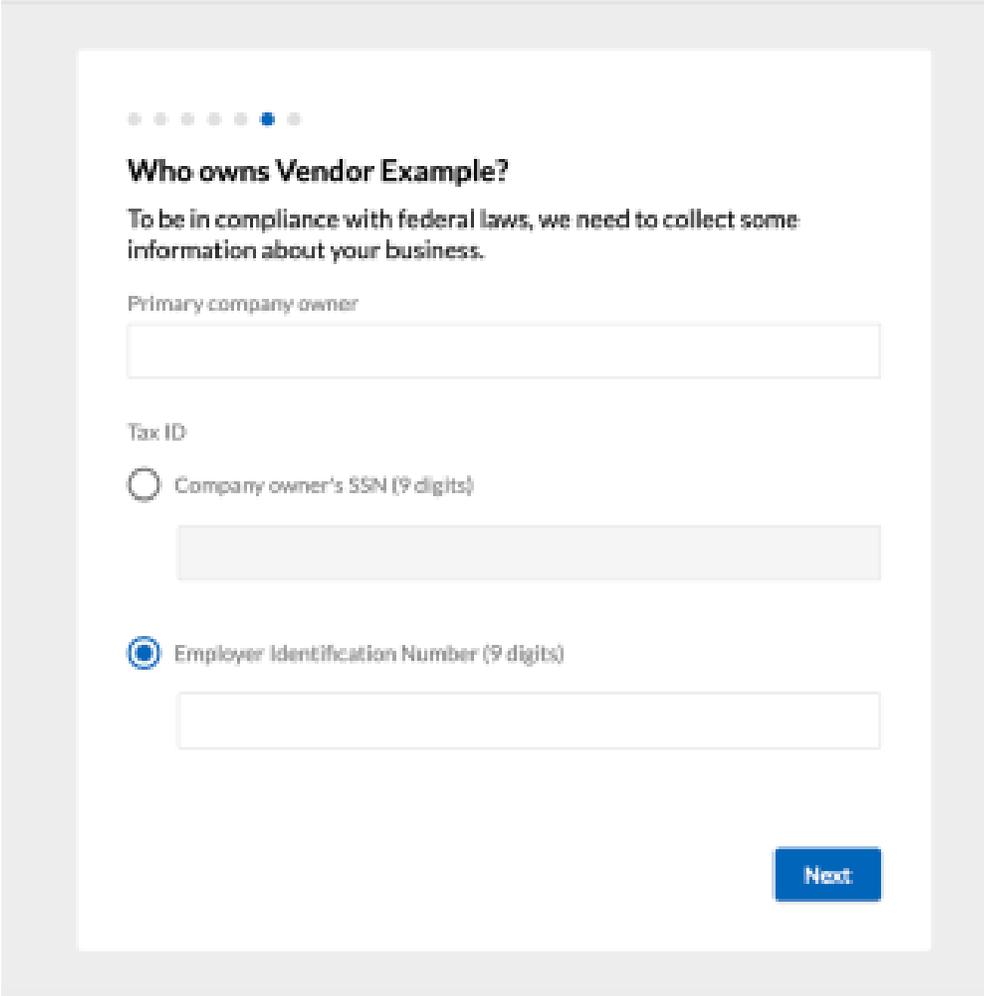
[Next](#)

# ACCOUNT SETUP: ORGANIZATIONS /GROUPS

For “Company owner,” add your organization’s leadership, such as a CEO or President.

Again, this is for Bill.com’s internal use and will have no effect on your account. You can change your answers after set up.

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Progress indicator: 6 dots, 5th dot is blue.

### Who owns Vendor Example?

To be in compliance with federal laws, we need to collect some information about your business.

Primary company owner

Tax ID

Company owner's SSN (9 digits)

Employer Identification Number (9 digits)

[Next](#)

# ACCOUNT SETUP: INDIVIDUALS

If you are an individual award recipient, pick "I'm an independent contractor."

**DO NOT** pick "I'm an employee."



What's your relationship to Arts & Humanities Council of Montgomery County?

This will help make sure you get paid properly.

- I'm with a business**  
You are a separate business getting paid by Arts & Humanities Council of Montgomery County.
- I'm an independent contractor**  
You are a 1099 or similar being paid by Arts & Humanities Council of Montgomery County.

- I'm an employee**  
You are a W-2 employee of Arts & Humanities Council of Montgomery County.

[I'm none of the above](#)

[Next](#)

# ACCOUNT SETUP: INDIVIDUALS

Enter the required fields  
(phone number, address,  
city, state, ZIP code) and  
click "Next."



## What is your contact information?

So your employer and Bill.com know where to contact you.

Pay to name

Ana-Alicia Feng

Phone

required

Address line 1

required

+ Address line 2

City

required

State

Zip

Next

# USER IDENTITY VERIFICATION

In some cases, Bill.com will need additional information to verify your bank account. If so, on the you will see an additional step to complete: **Verify your identity to activate your bank account.**

- **None of the information is saved.** It is simply used for verification.
- Be sure to use your personal information (full legal name, home address, etc.), as we are verifying your identity.
- Each user should complete their own verification. It is not advised to attempt verification on behalf of another user.
- You will have 3 attempts to verify your identity online.

Verifying the identity of a bank user adds security to an account; it helps prevent unauthorized individuals from creating a fraudulent account under the user's name and processing illegal transactions. It is also a legal requirement that identity verification be collected when moving money.

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# ACCOUNT SETUP: BANK INFORMATION

You may see this screen to set up your bank account instead. You can use instant verification (the first option), or manual entry (the second option)

Bill.com has a video tutorial for instant verification of your bank account: <https://help.bill.com/hc/en-us/articles/115005282726>

The screenshot shows a three-step progress bar at the top: 'Company info' (completed with a green checkmark), 'Connect bank account' (current step with a white circle), and 'Bank account details' (pending with a white circle). The main content area is titled 'VERIFY AND CONNECT' and includes the text: 'Whether you sign in or enter info, we'll securely connect your account(s)'. There are two primary options:

- RECOMMENDED SIGN INTO ONLINE BANKING**: 'Using your online banking username and password'. A blue 'Select' button is followed by the text 'Verify instantly!'. This option is highlighted with a green border.
- ENTER BANK ACCOUNT INFO**: 'Using your account and routing numbers'. A blue 'Select' button is followed by the text 'Verify in 1-2 business days'.

At the bottom of the main content area, a disclaimer reads: 'By making a selection you confirm that you have signing authority or permission to authorize transactions on the account.' To the right of the main content is a 'SECURITY MATTERS' box with a shield icon containing a dollar sign and the text: 'Our end-to-end encryption keeps your information safe'.

# ACCOUNT SETUP: BANK INFORMATION

Enter the bank account  
information.

Use the dropdown menu to choose  
the account type and click “Save  
and finish”.

Bill.com will send a test deposit of  
\$0.01 (a penny) to verify the  
account.



 ENCRYPTED

## Add a bank

We'll use this as your primary bank account for Bill.com

Routing number

required

Account number

required

Account holder name

required

Account type

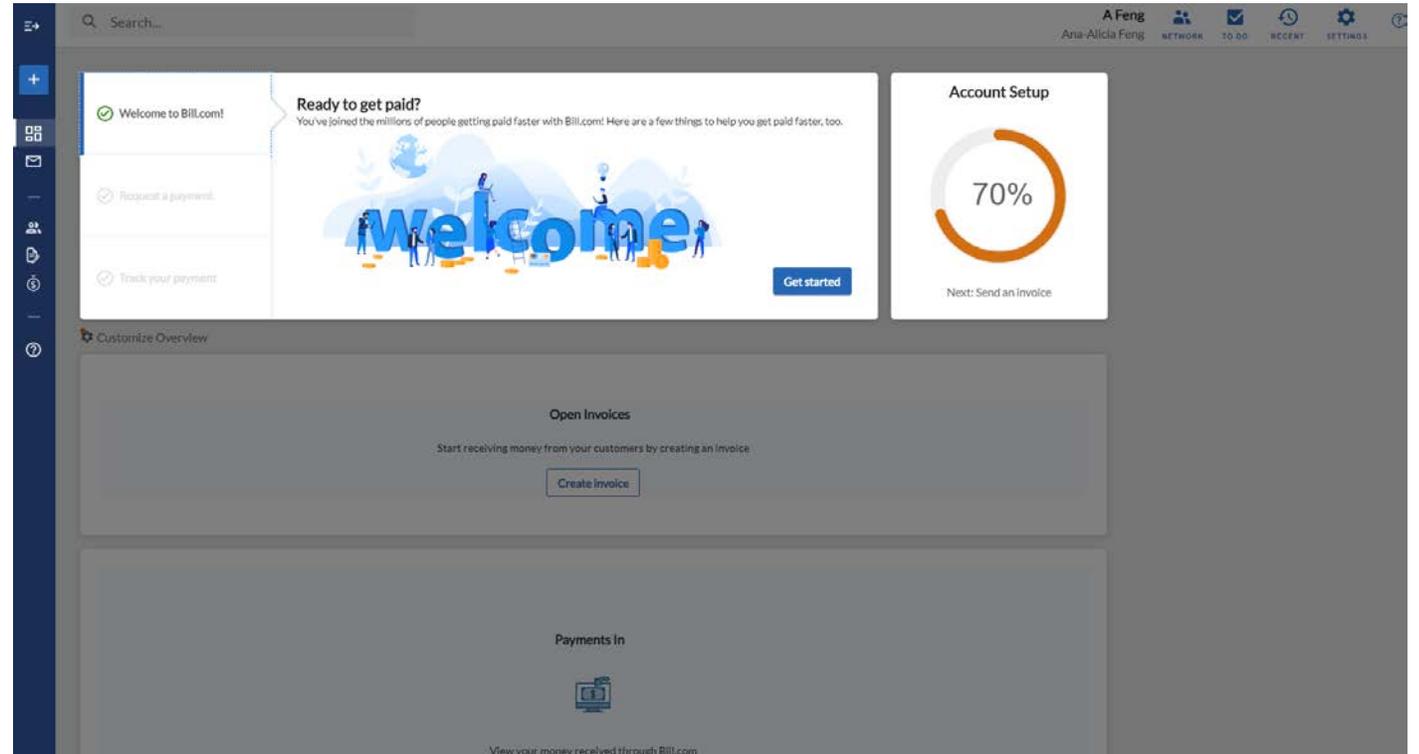
[Need help?](#)

[Save and finish](#)

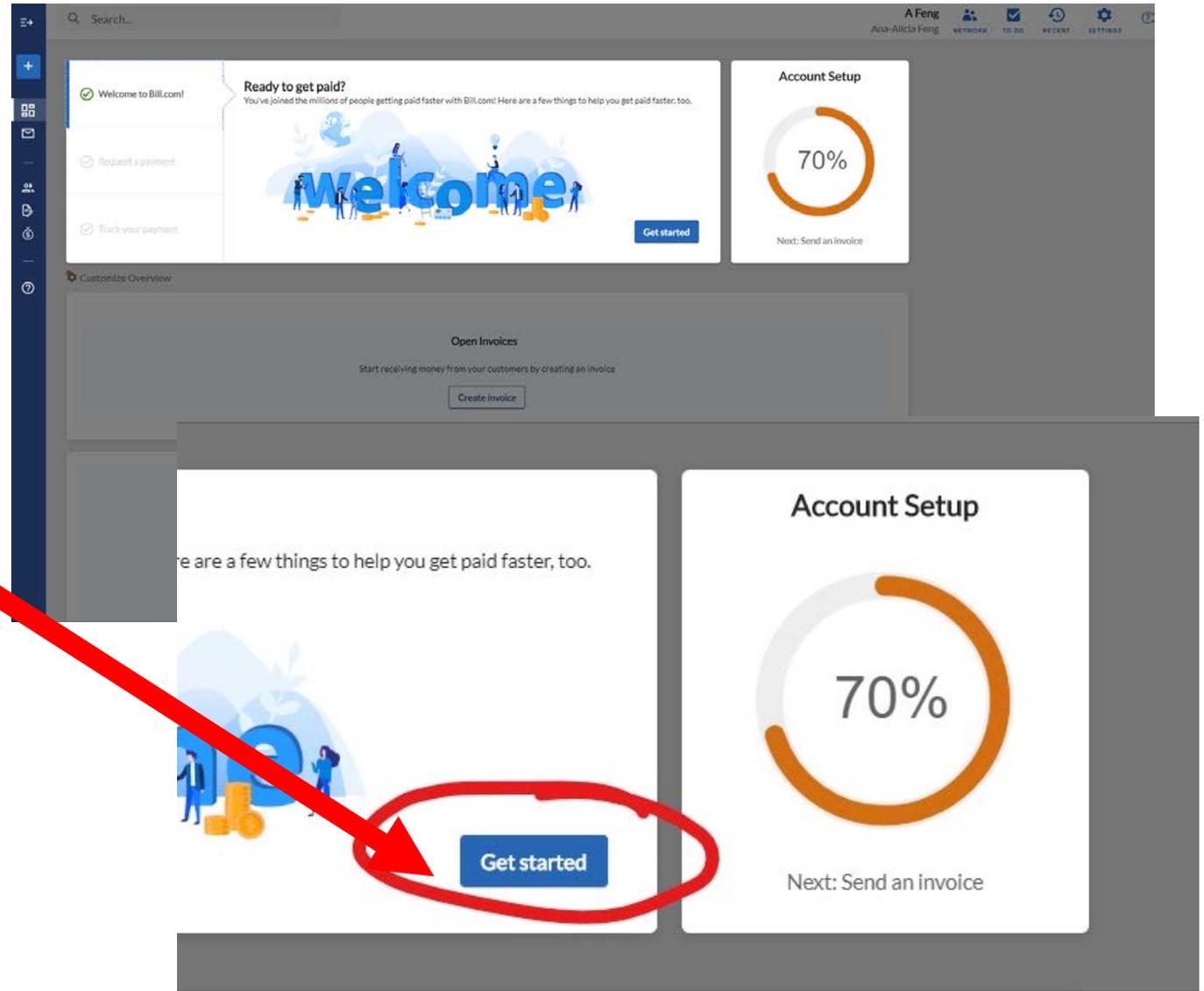
# YOUR ACCOUNT HAS BEEN SET UP!

This is the next page after  
you finish creating your  
account.

Click anywhere on the  
grayed-out space to be able  
to fully view the dashboard.



Do NOT click  
the blue "Get  
started"  
button.



# NAVIGATING BILL.COM

This is your dashboard on Bill.com and the page you will see every time you log in.

Do not be alarmed by the message indicating that your account is “70% set up.”

The screenshot displays the Bill.com dashboard interface. At the top, there is a search bar and user information for 'A Feng' (Ana-Alicia Feng) with navigation links for NETWORK, TO DO, RECENT, and SETTINGS. The main content area is divided into several sections:

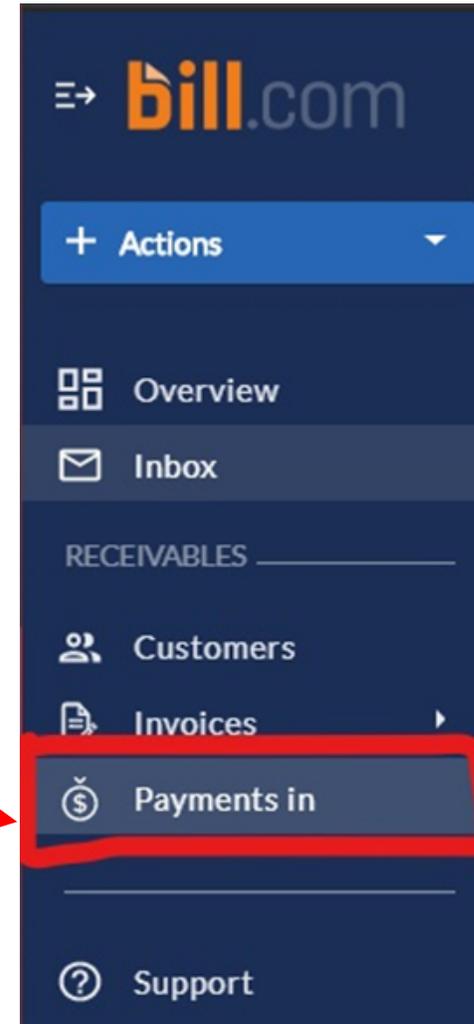
- Welcome to Bill.com:** A green checkmark icon and a 'Request a payment' button.
- Have an invoice ready?:** A section with the text 'Create an invoice in a few clicks—we'll send it to your customer's Bill.com account automatically, ready for them to review and pay.' It includes a 'COMPANY NAME' dropdown menu (set to 'Arts & Humanities Council of Montgomery County'), an 'AMOUNT' input field, and a 'Create new Invoice' button.
- Account Setup:** A circular progress indicator showing '70%' completion, with the text 'Next: Send an invoice' below it.
- Open Invoices:** A section with the text 'Start receiving money from your customers by creating an invoice' and a 'Create invoice' button.
- Payments In:** A section with a blue icon representing a payment.

A vertical sidebar on the left contains navigation icons for home, add, dashboard, messages, and settings.

# NAVIGATING BILL.COM: PAYMENTS

Hover over the dark blue navigation bar on the left-hand side until it expands.

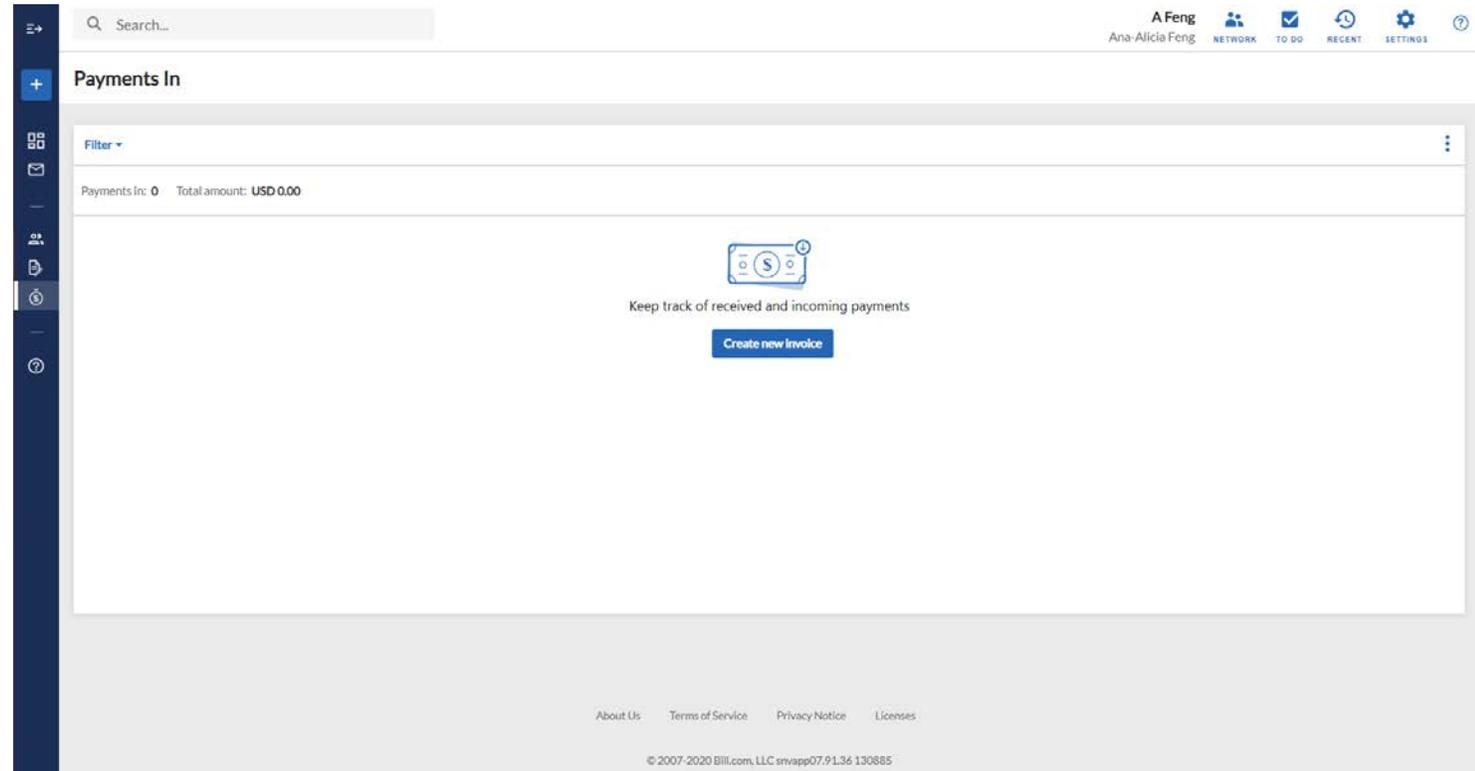
Click on the option that reads "Payments in".



# NAVIGATING BILL.COM: PAYMENTS

This is where you will see deposits once they are made.

This page will be blank until AHCMC authorizes the award disbursement to your bank account.



# A NOTE ABOUT INVOICES & DISBURSEMENTS

**DO NOT invoice AHCMC  
for your grant award.**

**\*Please note that it can  
take up to **10 days** for  
your bank account to  
reflect the deposit.\***

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AHCMC will process the award disbursement  
after we have received:

- Funding from the Montgomery County Government;
  - Outstanding requirements with AHCMC, such as final reports;
  - Your signed Award Agreement;
  - Your Bill.com Contact Form;
  - Your w-9, if applicable; and
  - The creation of your Bill.com account
- 

# DELAYED DISBURSEMENT?

If you have already signed, completed, and submitted the Award Agreement, created a Bill.com account, and successfully connected with AHCMC, there could be a few factors delaying the award disbursement.

- You have not submitted a W-9, if applicable.
- You have accepted the invitation but have not completed the account setup.
- You have accepted the invite and set up an account but have not yet added a bank account.
- You have accepted the invitation, set up an account, and added a bank account, but the bank account has not yet been verified.
- You have accepted the invitation, set up an account, and added a bank account, but the account was not valid.

**Please check that you have completed all the necessary steps before checking with AHCMC grants staff.**

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# SUBMITTING A W-9

*\*Individual award recipients and organizations without 501(c)(3) status will need to submit a W-9\**

**There are two methods to submit a W-9:**

- Upload it directly in [FluidReview](#), AHCMC's online grants portal; **or**
- Submit a **blank** invoice within the Bill.com system with the W-9 attached

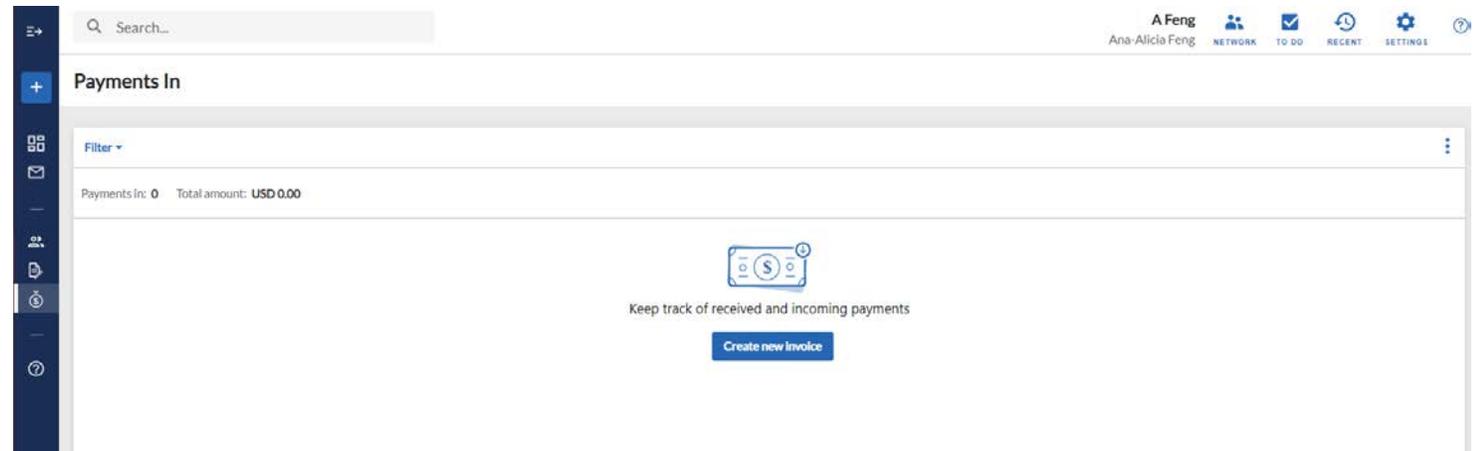
The second method is an option for grantees that do not feel comfortable sending a W-9 by email for security reasons.

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# NAVIGATING BILL.COM: SUBMITTING A W-9 WITH A BLANK INVOICE

There are several ways to create an invoice in Bill.com.

From the "Payments In" page, click the blue "Create new invoice" button in the middle of the page.



# NAVIGATING BILL.COM: SUBMITTING A W-9 WITH A BLANK INVOICE

Do not change any of the  
pre-filled fields.

Make sure to type "o" (zero)  
for the amount.

Add your grant category in  
the description.

### INVOICE

Customer name \*  
Arts & Humanities Council of Montgomery County

Invoice Number \*  
002

Amount \*  
USD 0.00

Due Date \*  
09/30/20

[Add an attachment](#)

Description  
W-9 for FY21 Artists & Scholars Project Grants (ASPG)

Use advanced invoices (invoice date, payment terms, tax, and more)

Total USD 0.00

# NAVIGATING BILL.COM: SUBMITTING A W-9 WITH A BLANK INVOICE

To add your W-9, click “Add an attachment.”



### INVOICE

Customer name \*  
Arts & Humanities Council of Montgomery County

Invoice Number \*  
002

Amount \*  
USD 0.00

Due Date \*  
09/30/20

[Add an attachment](#)

Description  
W-9 for FY21 Artists & Scholars Project Grants (ASPG)

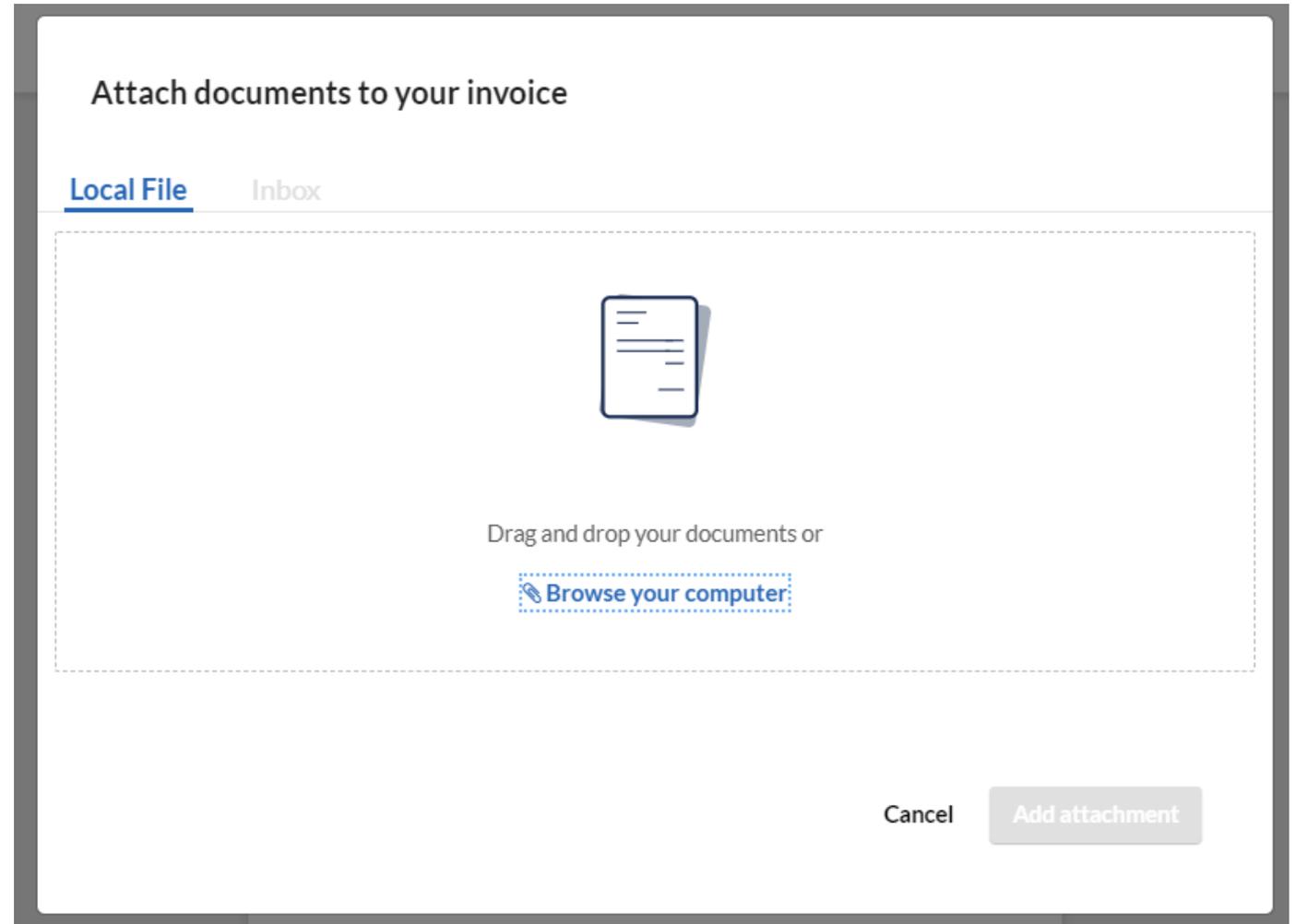
Use advanced invoices (invoice date, payment terms, tax, and more)

Total USD 0.00

# NAVIGATING BILL.COM: SUBMITTING A W-9 WITH A BLANK INVOICE

Click "Browse your computer"  
to upload your W-9.

If you've used Bill.com's Inbox  
feature to upload your W-9,  
use the tab at the top to select  
that document.



# NAVIGATING BILL.COM: SUBMITTING A W-9 WITH A BLANK INVOICE

This is what your uploaded file  
will look like.

Click the blue "Preview and  
send" button in the upper  
right-hand corner.



### INVOICE

Customer name \*  
Arts & Humanities Council of Montgomery County

Invoice Number \*  
003

Amount \*  
USD 0.00

Due Date \*  
09/30/20

[Add an attachment](#)

AHC-NewLogo-2.png

Description  
W-9 for FY21 Artists & Scholars Project Grants (ASPG)

Use advanced invoices (invoice date, payment terms, tax, and more)

Total USD 0.00

# NAVIGATING BILL.COM: SUBMITTING A W-9 WITH A BLANK INVOICE

You will have a chance to  
preview the invoice before  
sending.

× Send Invoice Edit Send ?

**Your invoice will be sent in the Bill.com Network**  
We'll send this invoice to Arts & Humanities Council of Montgomery County and notify you once it has been paid.

**OPTIONAL—NOTIFY OTHERS BY EMAIL**   
Send this invoice to additional email addresses.

Attachments:  
[FY21\\_Grants Awarded.pdf](#)

**Ana-Alicia Feng**  
1208 Potomac Valley Road  
Rockville, MD 20850  
2405436089

**INVOICE**

<b>Invoice #</b>	002
<b>Invoice Date</b>	09/30/20
<b>Amount Due:</b>	\$0.00

**Bill To:**  
Arts & Humanities Council of  
Montgomery County  
801 Ellsworth Drive  
Silver Spring, MD 20910  
United States

<b>Due Date</b>
09/30/20

# NAVIGATING BILL.COM: SUBMITTING A W-9 WITH A BLANK INVOICE

In the preview stage, you have the option of emailing a PDF copy of the invoice and W-9 to yourself and/or others (if part of an organization).

**If you are uncomfortable sending a W-9 by email, do not choose this option.**

**Your invoice will be sent in the Bill.com Network**  
We'll send this invoice to Arts & Humanities Council of Montgomery County and notify you once it has been paid.

**OPTIONAL—NOTIFY OTHERS BY EMAIL**   
Send this invoice to additional email addresses.

Reply-to  
Ana-Alicia Feng  Send a copy to me

To \*  
We'll send individually-addressed emails

cc

Subject \*  
You have an invoice from Ana-Alicia Feng due on 2020-09-30

Email body \* [Edit](#)

Hi Arts & Humanities Council of Montgomery County,  
Please remit payment at your earliest convenience.

Thank you,  
Ana-Alicia Feng

-----  
Invoice Summary:  
Invoice #: 003  
Amount Due: USD 0.00

# NAVIGATING BILL.COM: SUBMITTING A W-9 WITH A BLANK INVOICE

Click the blue “Send” button in the upper right-hand corner when you are ready.

If you wish to cancel this invoice, click the blue “x” in the upper left-hand corner until you see your Bill.com dashboard again.

The screenshot shows the 'Send Invoice' interface in Bill.com. At the top left, there is a close button (an 'x') and the text 'Send Invoice'. At the top right, there are 'Edit' and 'Send' buttons, along with a help icon. The main content area contains a message: 'Your invoice will be sent in the Bill.com Network' with a sub-message: 'We'll send this invoice to Arts & Humanities Council of Montgomery County and notify you once it has been paid.' Below this is a toggle switch for 'OPTIONAL—NOTIFY OTHERS BY EMAIL' with the text 'Send this invoice to additional email addresses.' Underneath is an 'Attachments:' section with a file named 'FY21\_Grants Awarded.pdf'. The bottom half of the screen shows a preview of the invoice itself. The invoice header includes the name 'Ana-Alicia Feng' and address '1208 Potomac Valley Road, Rockville, MD 20850, 2405436089'. The word 'INVOICE' is prominently displayed. To the right, a table shows 'Invoice # 002', 'Invoice Date 09/30/20', and 'Amount Due: \$0.00'. Below that, the 'Bill To:' information is listed: 'Arts & Humanities Council of Montgomery County, 801 Ellsworth Drive, Silver Spring, MD 20910, United States'. At the bottom of the preview, a 'Due Date' box shows '09/30/20'.

× Send Invoice

Edit Send ?

Your invoice will be sent in the Bill.com Network  
We'll send this invoice to Arts & Humanities Council of Montgomery County and notify you once it has been paid.

OPTIONAL—NOTIFY OTHERS BY EMAIL  
Send this invoice to additional email addresses.

Attachments:  
FY21\_Grants Awarded.pdf

**Ana-Alicia Feng**  
1208 Potomac Valley Road  
Rockville, MD 20850  
2405436089

**INVOICE**

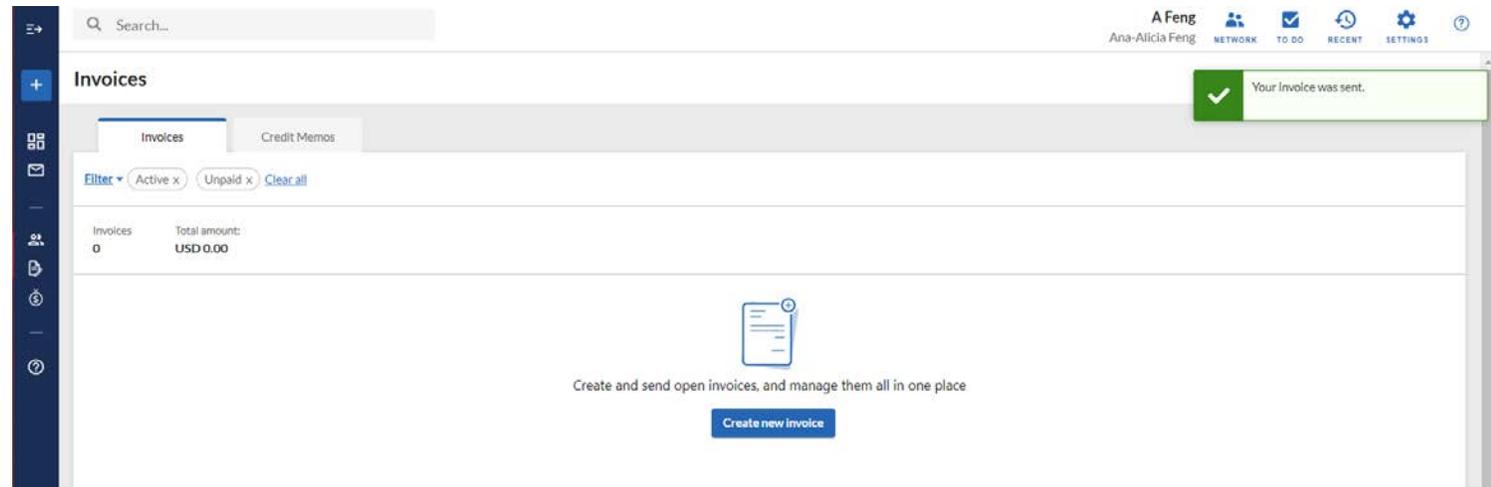
Invoice #	002
Invoice Date	09/30/20
Amount Due:	\$0.00

**Bill To:**  
Arts & Humanities Council of  
Montgomery County  
801 Ellsworth Drive  
Silver Spring, MD 20910  
United States

Due Date
09/30/20

# NAVIGATING BILL.COM: SUBMITTING A W-9 WITH A BLANK INVOICE

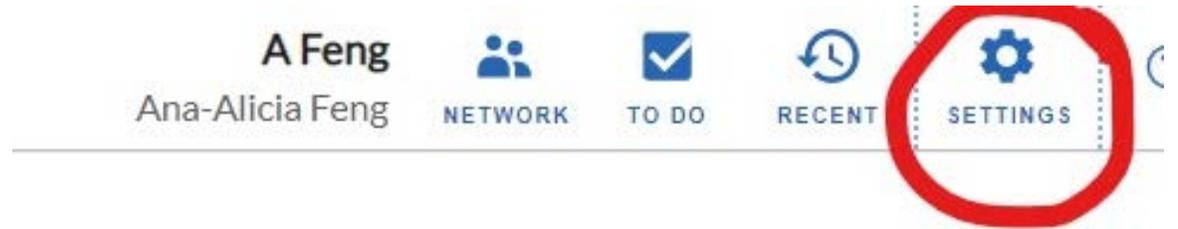
When your invoice is sent, you will see a green confirmation message in the upper right-hand corner.



# SETTINGS

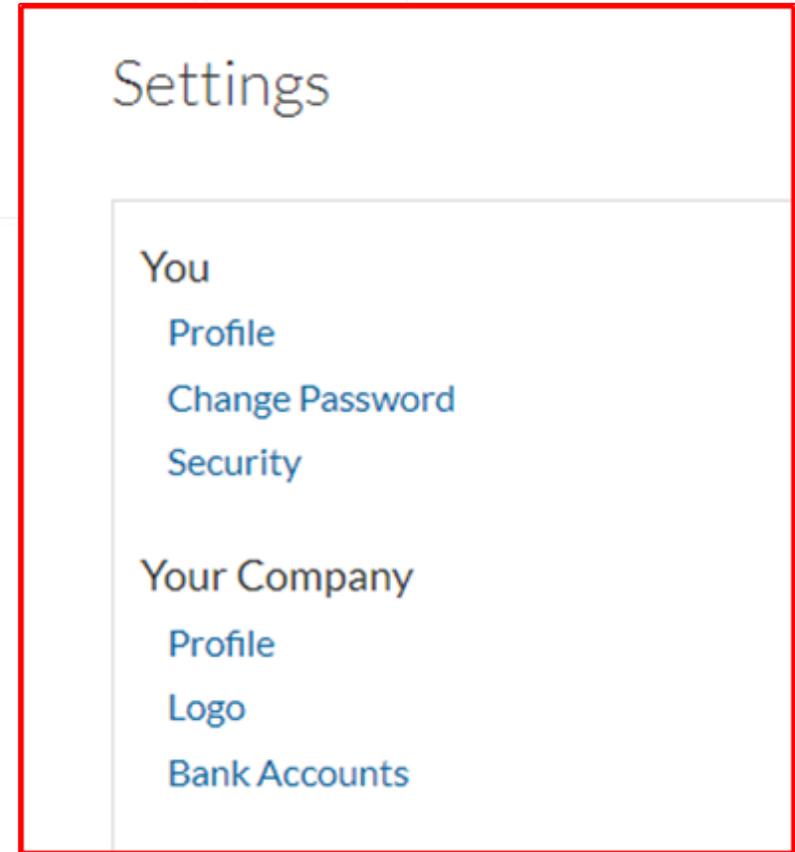
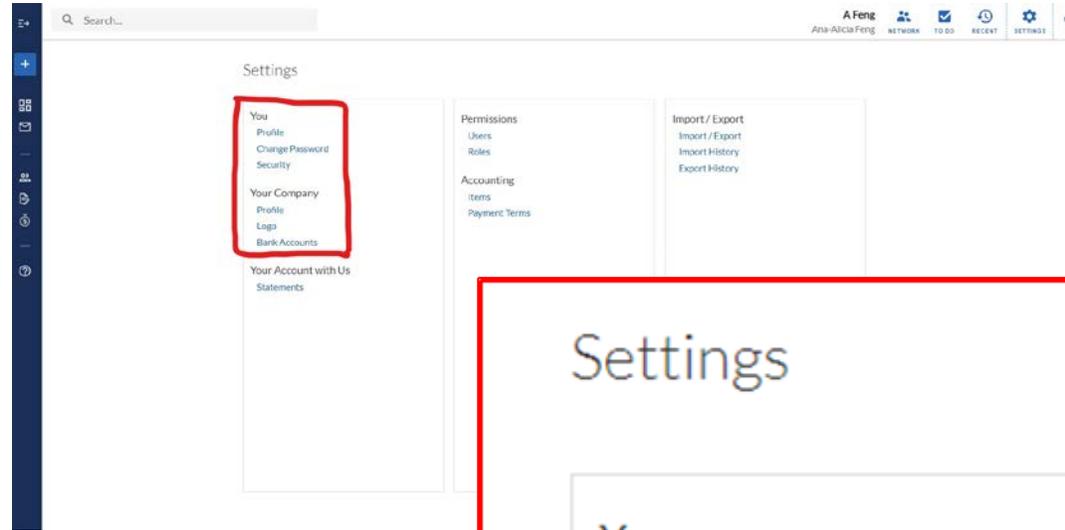
Need to edit your profile,  
password, or bank  
account?

Click on the label that  
reads "Settings" in the top  
right-hand corner.



# SETTINGS

You'll see a list of options such as Profile, Change Password, Bank Accounts, etc.



# SETTINGS: YOUR PROFILE

Click on the first "Profile"  
under the header "You".



## Settings

You

[Profile](#)

[Change Password](#)

[Security](#)

Your Company

[Profile](#)

[Logo](#)

[Bank Accounts](#)

# SETTINGS: YOUR PROFILE

You can change your name by clicking the icon on the top right-hand corner.

You also have access to email preferences and login history by hovering over "Details" in the top left-hand corner.

▸ Details



The profile card displays a silhouette placeholder for a profile picture on the left. To its right, the user's name and email address are listed. Below the name is a link to 'Upload a Picture'. On the right side of the card, several system settings are listed: 'AUTHORIZED FUNDING METHODS' (Bank), 'EXTERNAL ACCOUNTANT?' (No), 'TIME ZONE' (Pacific Time (GMT-8)), 'ROLE' (Administrator), and 'CONNECTION MANAGER' (No (Make Connection Manager)). A red circle highlights a small square icon in the top right corner of the card.

Ana-Alicia Feng  
anaalicia.feng@creativemoco.com

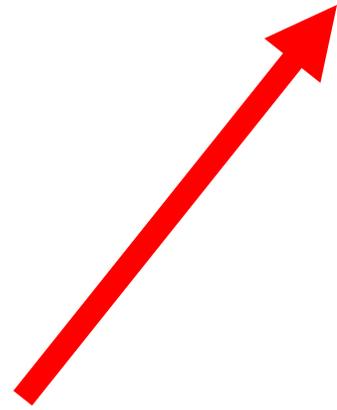
AUTHORIZED FUNDING METHODS Bank

EXTERNAL ACCOUNTANT? No

TIME ZONE Pacific Time (GMT-8)

ROLE Administrator

CONNECTION MANAGER No (Make Connection Manager)



▸ Details

- > Details ▸
- Email Preferences
- Login History
- Tasks
- Audit Trail
- Change Password
- Security

Ana-Alicia Feng  
anaalicia.feng@creativemoco.com

Upload a Picture

# SETTINGS: COMPANY PROFILE

Back on your general "Settings" page, click on the second "Profile" under the header "Your Company".

**All grantees, individuals and organizations/groups, are considered "Companies" on Bill.com.**

---

## Settings

You

[Profile](#)

[Change Password](#)

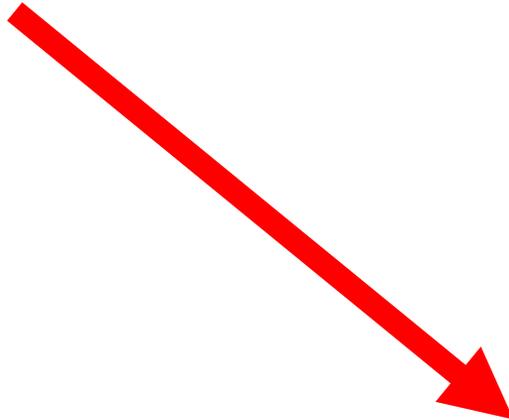
[Security](#)

Your Company

[Profile](#)

[Logo](#)

[Bank Accounts](#)



# SETTINGS: COMPANY PROFILE

This section allows you to control your profile visibility and edit your company name and address.

## Company Profile

### Settings

Control your network profile visibility. [Learn more](#)

- Public [Recommended]  
Your profile will be shareable with anyone outside of the Bill.com Network. Checks issued by you through Bill.com will contain a link to your profile, where your vendors can sign up to get paid by you electronically.
- Limited  
Other logged-in Bill.com members will be able to search for you, eliminating the need for others to invite you via email or Payment Network ID.
- Private  
Your profile can only be seen by Bill.com members who know your Payment Network ID, which you provide.

### Company Information

Provide information about your company.

Visible outside Bill.com

* COMPANY NAME	<input type="text" value="Ana-Alicia Feng"/>	
* DISPLAY NAME <sup>?</sup>	<input type="text" value="Ana-Alicia Feng"/>	<input checked="" type="checkbox"/>
* PHONE	<input type="text" value="REDACTED"/>	<input type="checkbox"/>
URL	<input type="text" value="https://www.bill.com/network/REDACTED"/>	<input checked="" type="checkbox"/>
COMPANY LOGO	<a href="#">Add a logo</a>	
ABOUT	<input type="text"/>	<input type="checkbox"/>

### Company Location

* COUNTRY	<input type="text" value="United States"/>	<input type="checkbox"/>
* ADDRESS	<input type="text" value="REDACTED"/>	

# SETTINGS: COMPANY PROFILE

This is also where you can find  
your Payment Network ID, if  
necessary.

## Company Profile

Details

Settings

Private

Company Information

COMPANY NAME Ana-Alicia Feng

DISPLAY NAME Ana-Alicia Feng

PHONE [REDACTED]

URL [REDACTED]

COMPANY LOGO [Add a logo](#)

ABOUT

Company Location

COUNTRY United States

ADDRESS [REDACTED]

CITY [REDACTED]

STATE / PROVINCE [REDACTED]

ZIP / POSTAL CODE [REDACTED]

Other Info

COMPANY CURRENCY USD - United States Dollar

INDUSTRY [REDACTED]

BUSINESS TYPE [REDACTED]

PURPOSE OF USE [REDACTED]

NUMBER OF EMPLOYEES [REDACTED]

TIMEZONE Eastern Time (GMT-5)

PAYMENT NETWORK ID [REDACTED] ⓘ

# SETTINGS: USERS

If you want to add additional users to your account from your organization, or if you've changed your email address, you'll need to add another user.

Click "Users" under the header "Permissions".

## Settings

### You

- [Profile](#)
- [Change Password](#)
- [Security](#)

### Your Company

- [Profile](#)
- [Logo](#)
- [Bank Accounts](#)

### Your Account with Us

- [Statements](#)

### Permissions

- [Users](#)
- [Roles](#)

### Accounting

- [Items](#)
- [Payment Terms](#)

### Import / Export

- [Import / Export](#)
- [Import History](#)
- [Export History](#)

### Permissions

- [Users](#)
- [Roles](#)

### Accounting

- [Items](#)
- [Payment Terms](#)

# SETTINGS: USERS

Click the blue “New” button in the top right-hand corner to add a new user.

Users

NEW

NAME	ROLE	AUTHORIZED FUNDING METHODS	CONNECTION MANAGER	EMAIL
 Ana-Alicia Feng	Administrator	Bank	No	anaalicia.feng@creativemoco.co...

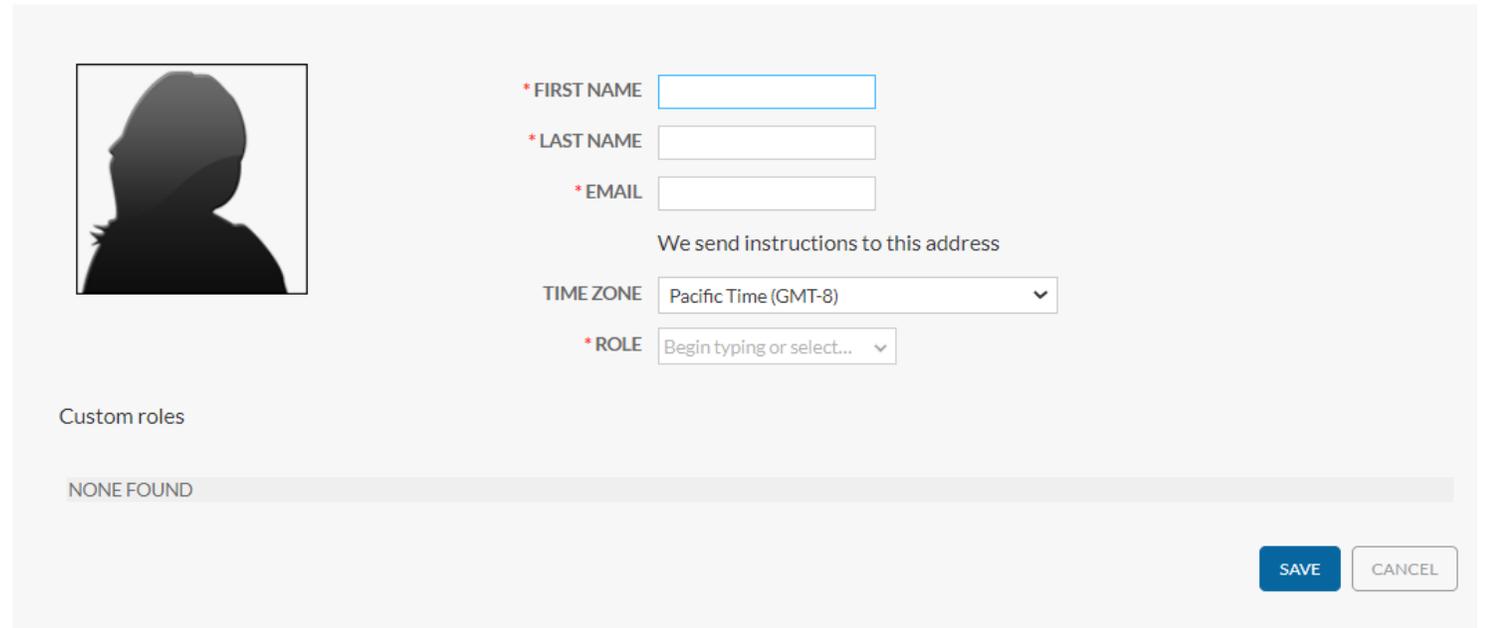
Show Inactive Users

# SETTINGS: USERS

Fill out the required fields for the new user.

If you are just changing email addresses, you'll need to delete your old user profile after this step.

## Users



The form is titled "Users" and is used for creating or editing a user profile. It features a profile picture placeholder on the left, which is a black silhouette of a person's head and shoulders. To the right of the profile picture are several input fields:

- \* FIRST NAME: A text input field.
- \* LAST NAME: A text input field.
- \* EMAIL: A text input field. Below this field is the text "We send instructions to this address".
- TIME ZONE: A dropdown menu currently showing "Pacific Time (GMT-8)".
- \* ROLE: A dropdown menu currently showing "Begin typing or select...".

Below the input fields is a section titled "Custom roles" which contains the text "NONE FOUND". At the bottom right of the form are two buttons: "SAVE" (a blue button) and "CANCEL" (a white button with a grey border).

# OPTIONAL: BACKUP 2-STEP VERIFICATION

You can setup a backup phone number in case you don't have access to your primary phone number.

This is OPTIONAL but adds another layer of security to your account.

## My Profile



To view and use sensitive information, you'll receive a security code on your phone. **Enter your backup 2-Step Verification Method**

### Details



Ana-Alicia Feng  
anaalicia.feng@creativemoco.com

[Upload a Picture](#)

AUTHORIZED FUNDING METHODS Bank

EXTERNAL ACCOUNTANT? No

TIME ZONE Pacific Time (GMT-8)

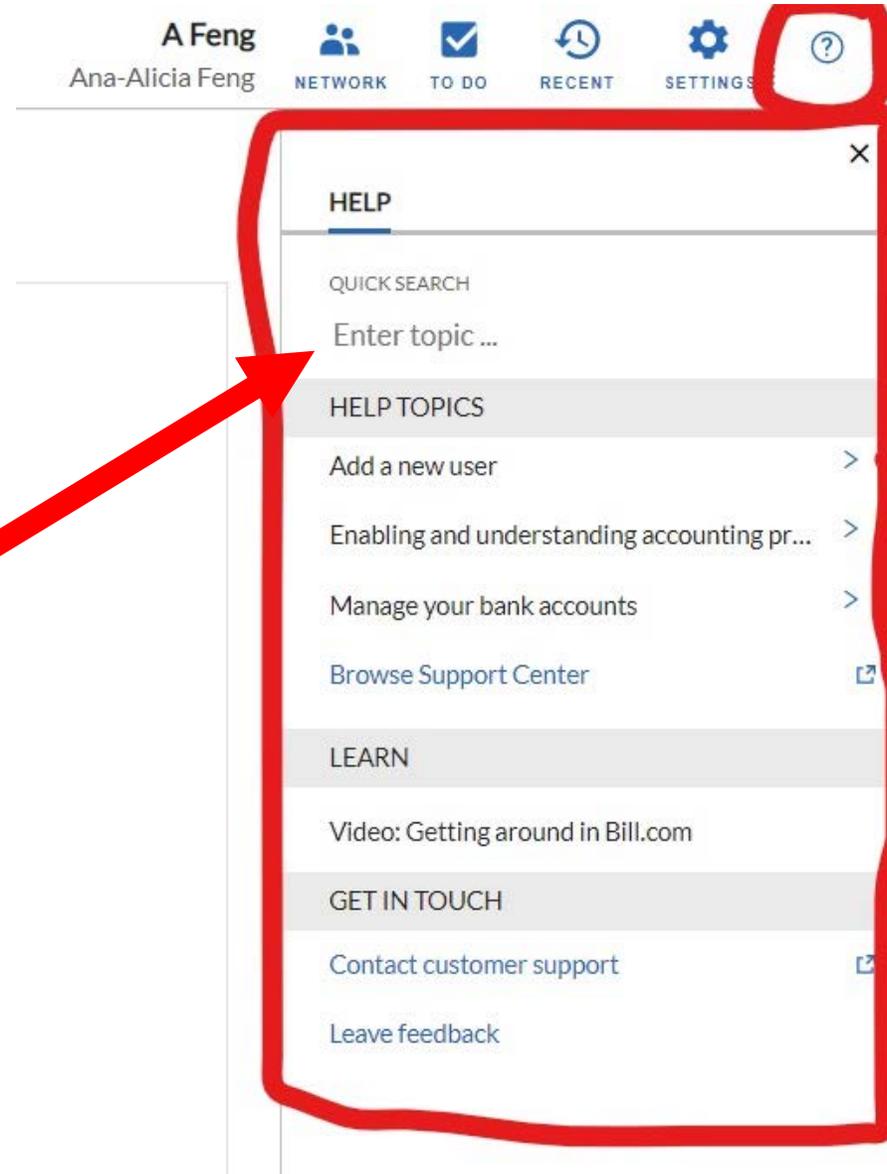
ROLE Administrator

CONNECTION MANAGER No (Make Connection Manager)

# CONTACTING BILL.COM: HELP CENTER

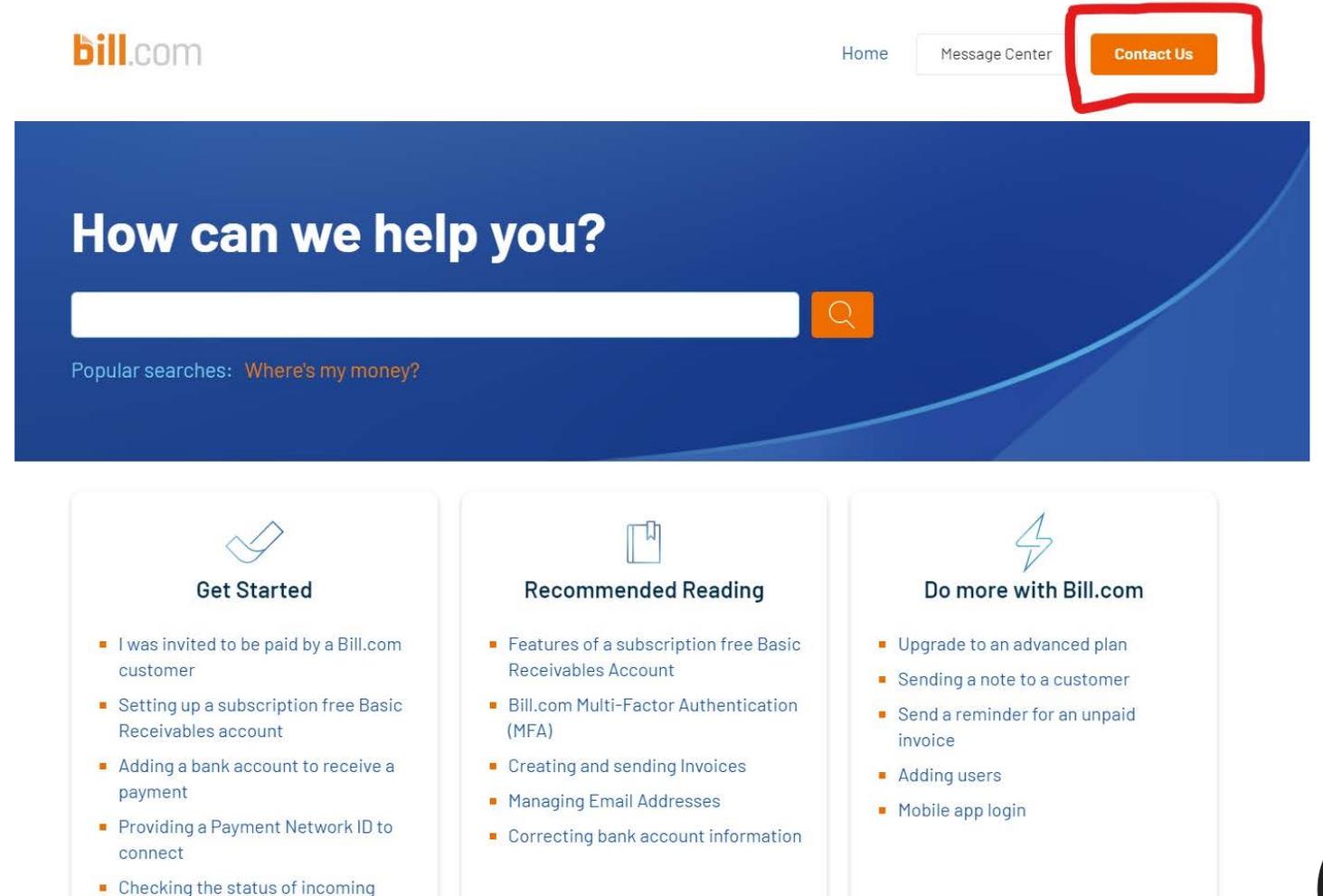
In the top right-hand corner,  
Bill.com has a Help Center.

Click on the question mark  
and enter your topic of  
interest to search the Help  
Center articles.



# CONTACTING BILL.COM

Search for help articles or click the orange “Contact Us” button in the upper right-hand corner.



The screenshot shows the Bill.com website interface. At the top left is the Bill.com logo. In the top right corner, there are three navigation links: "Home", "Message Center", and "Contact Us". The "Contact Us" button is highlighted with a red rectangular box. Below the navigation bar is a dark blue banner with the heading "How can we help you?". Underneath the heading is a white search input field with an orange search icon to its right. Below the search field, it says "Popular searches: Where's my money?". Below the banner are three white cards with rounded corners. The first card is titled "Get Started" and features a checkmark icon. The second card is titled "Recommended Reading" and features a document icon. The third card is titled "Do more with Bill.com" and features a lightning bolt icon. Each card contains a list of links to help articles.

**bill.com** Home Message Center **Contact Us**

## How can we help you?



Popular searches: [Where's my money?](#)

### Get Started

- I was invited to be paid by a Bill.com customer
- Setting up a subscription free Basic Receivables account
- Adding a bank account to receive a payment
- Providing a Payment Network ID to connect
- Checking the status of incoming

### Recommended Reading

- Features of a subscription free Basic Receivables Account
- Bill.com Multi-Factor Authentication (MFA)
- Creating and sending Invoices
- Managing Email Addresses
- Correcting bank account information

### Do more with Bill.com

- Upgrade to an advanced plan
- Sending a note to a customer
- Send a reminder for an unpaid invoice
- Adding users
- Mobile app login

# CONTACTING BILL.COM

If you clicked "Contact Us," a pop-up box will appear in the bottom right-hand corner.

Type in your question and click the "Ask Question" button at the bottom.

The screenshot shows the Bill.com website interface. At the top left is the Bill.com logo. To the right are navigation links for "Home", "Message Center", and "Contact Us". Below the navigation is a blue banner with the text "How can we help you?" and a search input field. Below the search field are "Popular searches" including "How do I give a customer my PNI?". The main content area is divided into three columns: "Get Started" with a checklist of tasks, "Recommended Reading" with a list of articles, and a "Need additional assistance?" pop-up box. The pop-up box contains a "Close" button, a heading "Need additional assistance?", a paragraph of text, a list of example questions, a text input field with the placeholder "Type in your question here.", and an "Ask Question" button. A red arrow points to the input field, and a red box highlights the "Ask Question" button. At the bottom of the pop-up is the text "Powered by Solvvy".

# CONTACTING BILL.COM

Bill.com will first pull up relevant articles. If you still wish to contact support, click the navy blue “Contact Support” button at the bottom.



Home

Message Center

Contact Us

## How can we help you?



Popular searches: [Where's my money?](#)



### Get Started

- I was invited to be paid by a Bill.com customer
- Setting up a subscription free Basic Receivables account
- Adding a bank account to receive a payment
- Providing a Payment Network ID to connect
- Checking the status of incoming



### Recommended Reading

- Features of a subscription free Basic Receivables Account
- Bill.com Multi-Factor Authentication (MFA)
- Creating and sending Invoices
- Managing Email Addresses
- Correcting bank account information

← Edit Question

Close

Q: Type in your question here.

A: Bill.com and Tax1099: Frequently asked questions (FAQ)

Here are some frequently asked questions about how Tax1099 works with Bill.com.

Click each question to review the answer listed below:

- How do I connect Tax1099 with my Bill.com account?
- Where do I find the link to the Tax1099 app in Bill.com?
- How do I mark vendors as 1099 in Bill.com?
- How do I assign Chart of Accounts to 1099 categories?

Contact Support

Powered by Solvvy

# CONTACTING BILL.COM

You will have the option of sending an email or engaging with a support person in real time via chat.

The screenshot shows the Bill.com website interface. At the top, there is a navigation bar with the Bill.com logo, a 'Home' link, a 'Message Center' button, and a 'Contact Us' button. Below this is a dark blue header with the breadcrumb 'Support > Account Setup > Bank Account Setup' and a search bar. The main content area explains that if a bank rejects an ePayment transaction, the account is marked as invalid and provides instructions on how to resolve the issue. It lists five common return codes: R01 (Insufficient Funds), R02 (Account Closed), R03 (No Account/Unable to Locate Account), R16 (Funds not available), and R09 (Company/Customer Address Not Authorized). A 'Contact Support' overlay is visible on the right side, offering options to 'Email' or 'Chat' with support. The overlay also includes a 'View Solutions Again' button and a 'Close' button. At the bottom of the overlay, it says 'Powered by Solvvy'.

bill.com

Home Message Center Contact Us

Support > Account Setup > Bank Account Setup

If a bank rejects an ePayment transaction or a test transaction when adding a bank account, the bank account is marked as invalid and inactivated in Bill.com. You will need to check the reason code by following the steps below, and re-add the bank once you have addressed the issue based on the reason code, or add a different bank.

**Details for why a bank account was invalidated**

1. Click **Settings**
2. Under **Your Company**, click **Bank Accounts**
3. Click the **bank account number** that displays **Invalid** under **Verification Status**
4. Hover over **Details** and click **Audit Trail**

The bank return code is displayed in the **New Value** field and often includes details explaining the code. This code explains why the funds were rejected by the receiving bank.

We process ePayments via ACH (Automated Clearing House) and cannot deposit to some accounts. For example, we cannot deposit to accounts that do not accept ACH in CCD format. We send business bank to business bank files, which also work for personal bank accounts.

**5 most common return codes**

**R01** - Insufficient Funds - the available balance is not sufficient to cover the dollar amount of the debit entry.

**R02** - Account Closed - a previously active account has been closed by customer or customer's bank.

**R03** - No Account/Unable to Locate Account - the account structure is valid and passes editing process, but the account is not an open account.

**R16** - The account and/or its funds are currently not available.

**R09** - Company/Customer Address Not Authorized - BPEI has been notified by Depositor/Company account that Account is not authorized.

< View Solutions Again Close

**Contact Support**  
Ways to contact our support team

**Email**  
We will be in touch as soon as possible. >

**Chat**  
Chat directly with a support advocate. >

Powered by Solvvy

# CONTACTING BILL.COM: EMAIL

If you choose to send an email, fill out this form and click submit. A Bill.com support person will respond as soon as they can.

## Submit a request

CC

Add emails

Subject \*

Description \*

Can't find my United Bank

Please enter the details of your request. A member of our support staff will respond as soon as possible.

Phone Number

Issue Type \*

Attachments

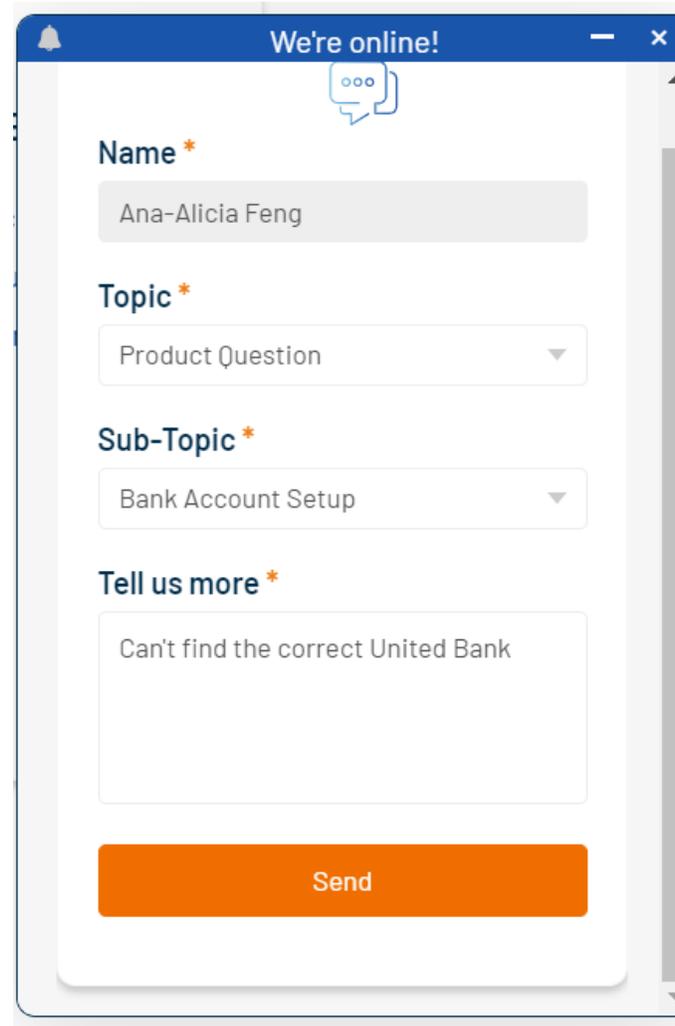
Add file or drop files here

Submit

# CONTACTING BILL.COM: CHAT

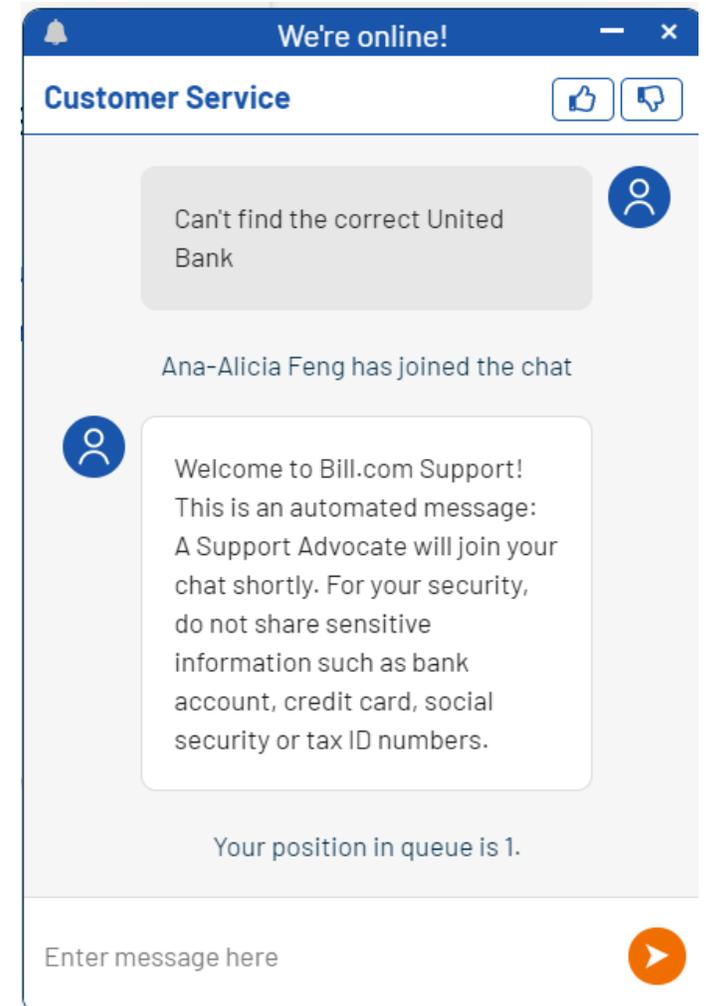
If you choose to start a chat, select your topic, sub-topic, specify your question, and click "Send."

The Customer Service chat will open and a Bill.com support person will join the chat shortly.



A screenshot of a web browser window titled "We're online!". The page shows a chat start form with the following fields:

- Name \***: A text input field containing "Ana-Alicia Feng".
- Topic \***: A dropdown menu with "Product Question" selected.
- Sub-Topic \***: A dropdown menu with "Bank Account Setup" selected.
- Tell us more \***: A text area containing "Can't find the correct United Bank".
- Send**: A large orange button at the bottom.



A screenshot of the Bill.com chat interface. The window title is "We're online!". The header shows "Customer Service" with a thumbs up and thumbs down icon. The chat history includes:

- A grey message bubble: "Can't find the correct United Bank" with a user icon on the right.
- A system message: "Ana-Alicia Feng has joined the chat".
- A white message bubble with a blue user icon on the left: "Welcome to Bill.com Support! This is an automated message: A Support Advocate will join your chat shortly. For your security, do not share sensitive information such as bank account, credit card, social security or tax ID numbers." Below this bubble, it says "Your position in queue is 1."

At the bottom, there is a text input field labeled "Enter message here" and an orange send button.

# HELPFUL LINKS

Below are links to help articles on Bill.com's website.

- Setting up an account: <https://help.bill.com/hc/en-us/articles/115005387243#connect-with-an-invite-from-your-customer>
  - Adding a bank account: <https://help.bill.com/hc/en-us/articles/115005282726>
- 
- 

# QUESTIONS?

## EMAIL THE AHC MC GRANTS TEAM

### **Ana-Alicia Ih-Tzai Feng**

Grants Program Coordinator

[AnaAlicia.Feng@creativemoco.com](mailto:AnaAlicia.Feng@creativemoco.com)

(301) 565-3805 ext. 21

### **Karen Judson**

Grants Program Manager

[Karen.Judson@creativemoco.com](mailto:Karen.Judson@creativemoco.com)

(301) 565-3804

### **Takenya LaViscount**

Grants Director

[Takenya.LaViscount@creativemoco.com](mailto:Takenya.LaViscount@creativemoco.com)

(240) 839-4519