

Guide to Bill.com for AHCMC Grantees



FY21 Grant Agreement and Bill.com Registration Deadline:

*Friday,
October 2, 2020
11:59 P.M.*



THIS GUIDE WILL COVER...

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



BILL.COM CONTACT FORM

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

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 EMAIL INVITATION

To use Bill.com, you must receive an email invitation from AHCMC.

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 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 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.

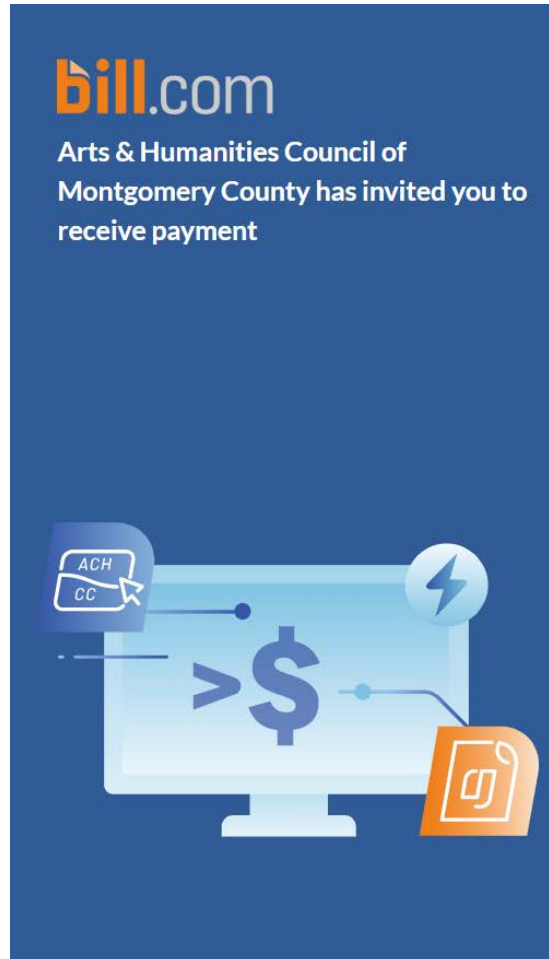
Please don't reply to this automated email.

© 2007-2020 Bill.com, LLC
snwworker3.90.29 128506 OTID0069-0SG



CREATING AN ACCOUNT

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



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.



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



ACCOUNT SETUP: CATEGORY

Both individual and organization/group grantees must pick the first option: "I'm with a business".



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: BASIC INFORMATION

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

Phone

required

Address line 1

required

+ Address line 2

City

required

State

Zip



ACCOUNT SETUP: BANK INFORMATION

Enter the bank
account information for the
grant deposit.

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



 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?](#)

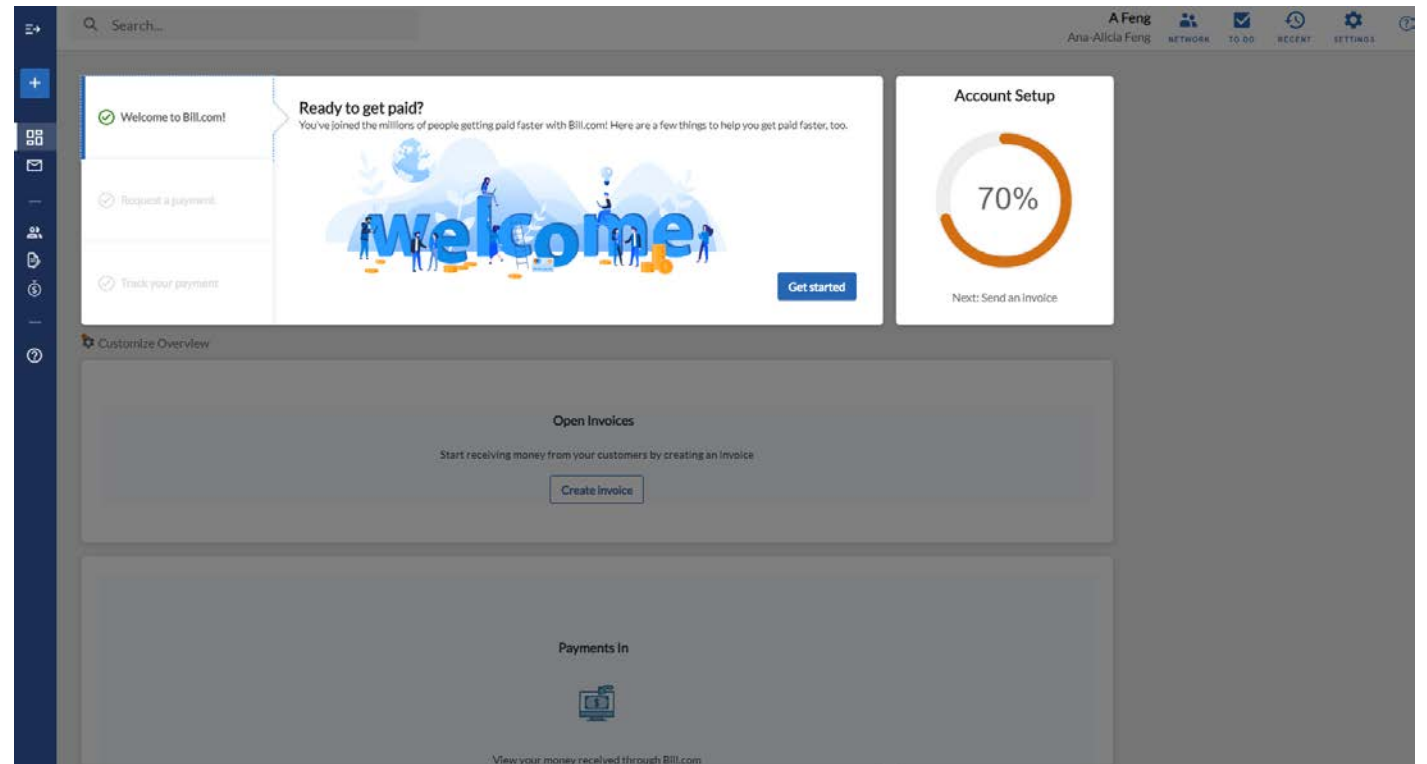
[Save and finish](#)



YOUR ACCOUNT HAS BEEN CREATED

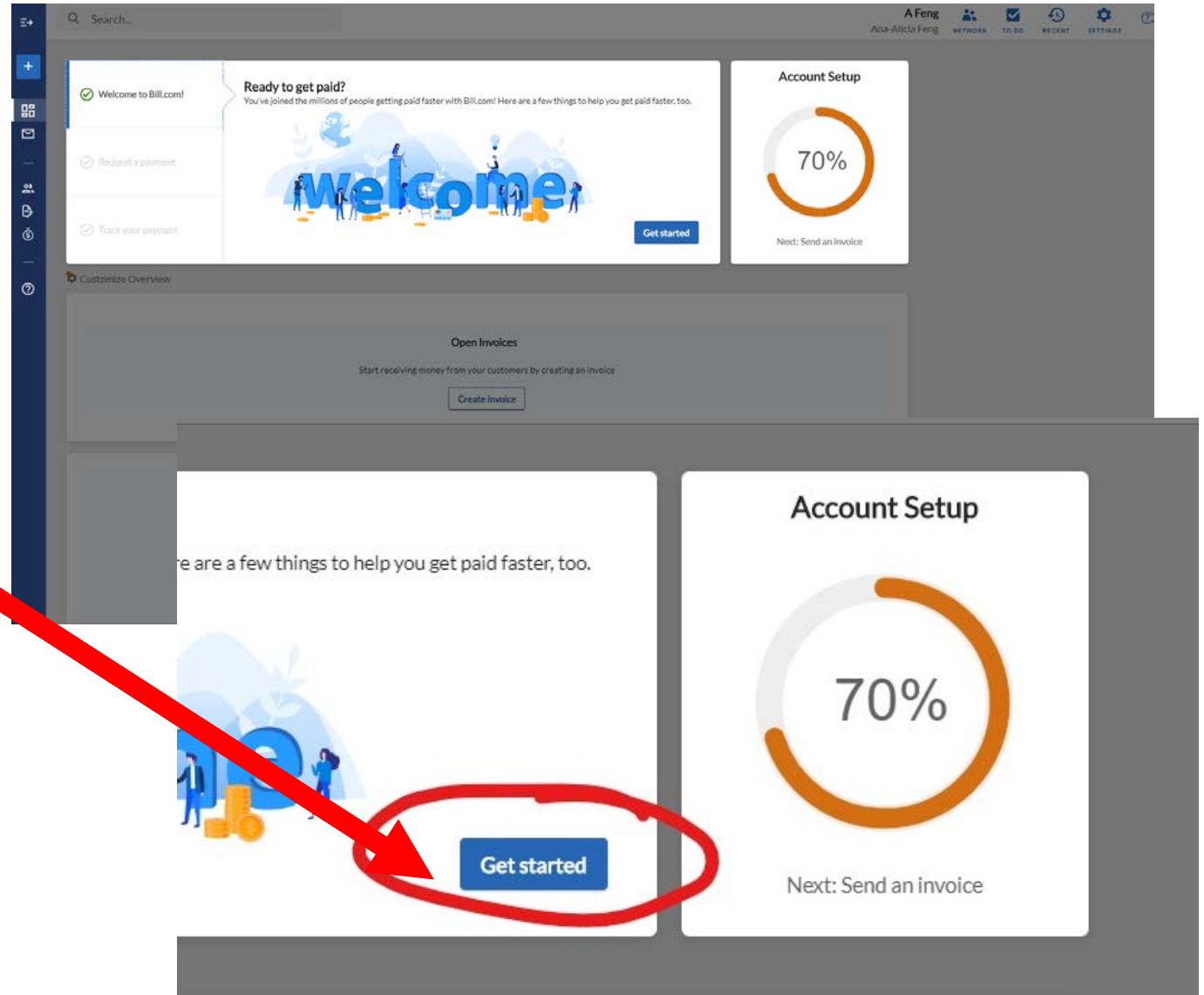
This is the next page after you finish creating your account.

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



YOUR ACCOUNT HAS BEEN CREATED

Do **NOT** click the blue "Get started" button.



NAVIGATING BILL.COM: DASHBOARD

This is your dashboard, which is equivalent to your homepage on Bill.com.

The screenshot displays the Bill.com dashboard. At the top, there is a search bar and a user profile 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 link to 'Request a payment' and 'Track your payment'.
- Have an invoice ready?**: A prompt to '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' field with a building icon and the text 'Arts & Humanities Council of Montgomery County', and an 'AMOUNT' input field. A 'Create new invoice' button is located at the bottom right of this section.
- Account Setup**: A circular progress indicator showing '70%' completion. Below it, the text reads 'Next: Send an invoice'.
- Open Invoices**: A light blue box with the text 'Start receiving money from your customers by creating an invoice' and a 'Create invoice' button.
- Payments In**: A light blue box with a dollar sign icon.

A 'Customize Overview' gear icon is visible on the left side of the dashboard.



NAVIGATING BILL.COM: PAYMENTS

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

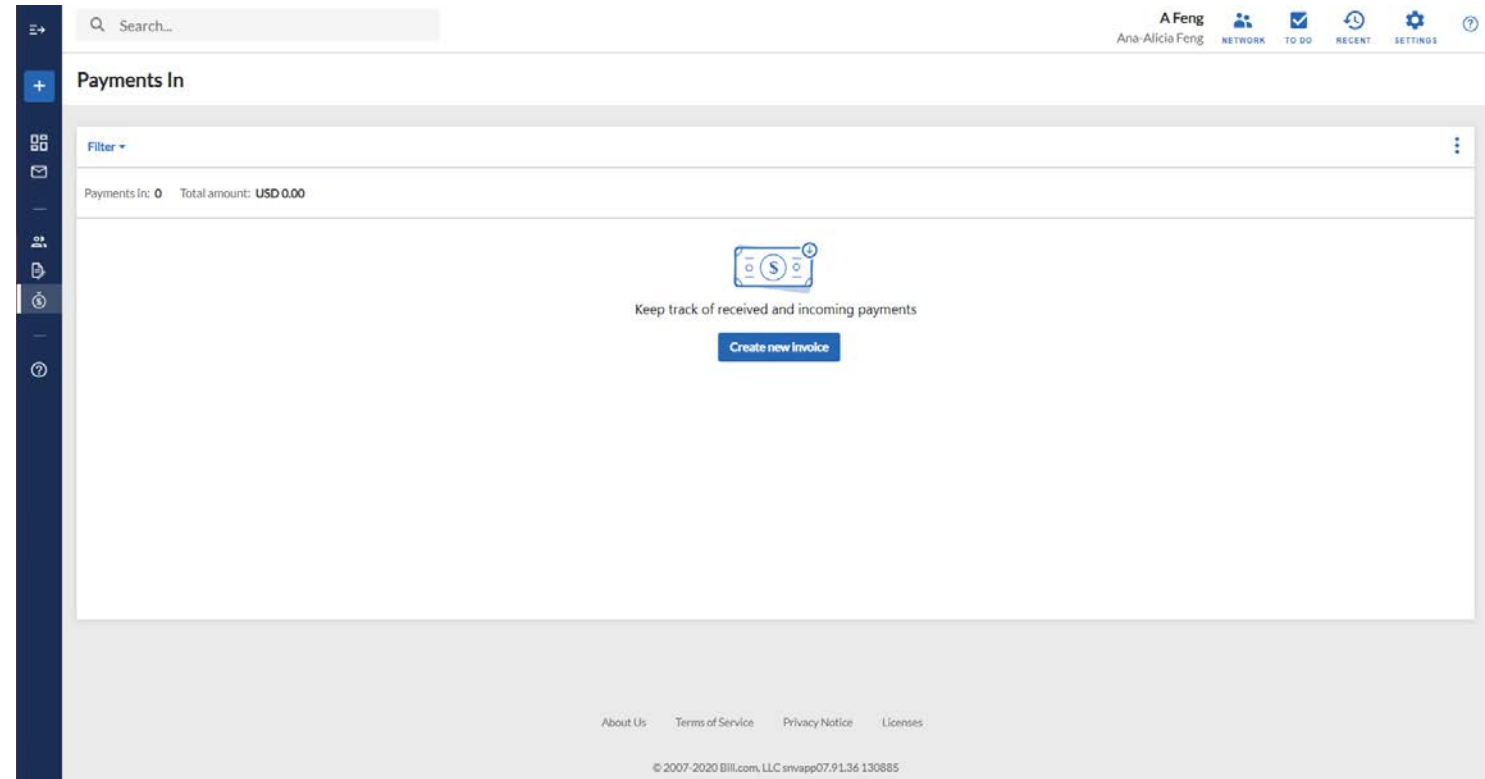
Click on the option that reads "Payments in".



NAVIGATING BILL.COM: PAYMENTS

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

This page will be blank until AHC MC authorizes the payment to your bank account.



A NOTE ABOUT PAYMENTS

DO NOT invoice AHCMC for your grant award.

AHCMC will submit payment to your bank account after we have received:

- Funding from the Montgomery County Government
- Your FY20 Final Report (if applicable)
- Your signed FY21 Grant Agreement
- Your Bill.com Contact Form
- The creation of your Bill.com account

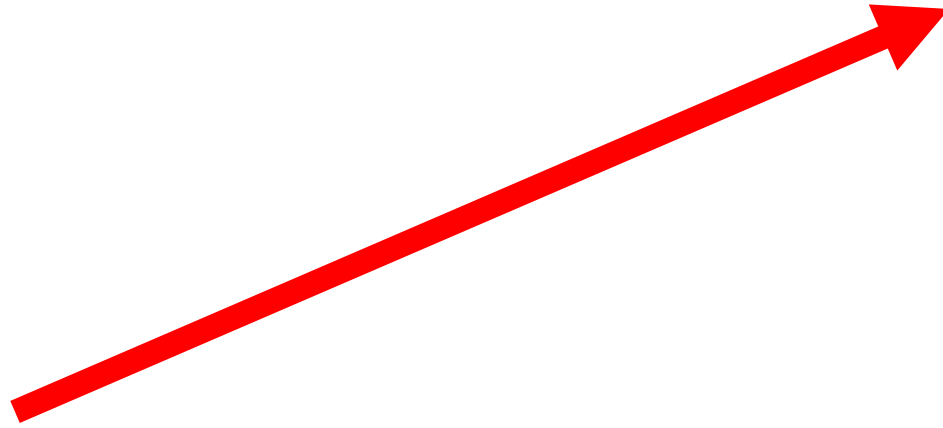
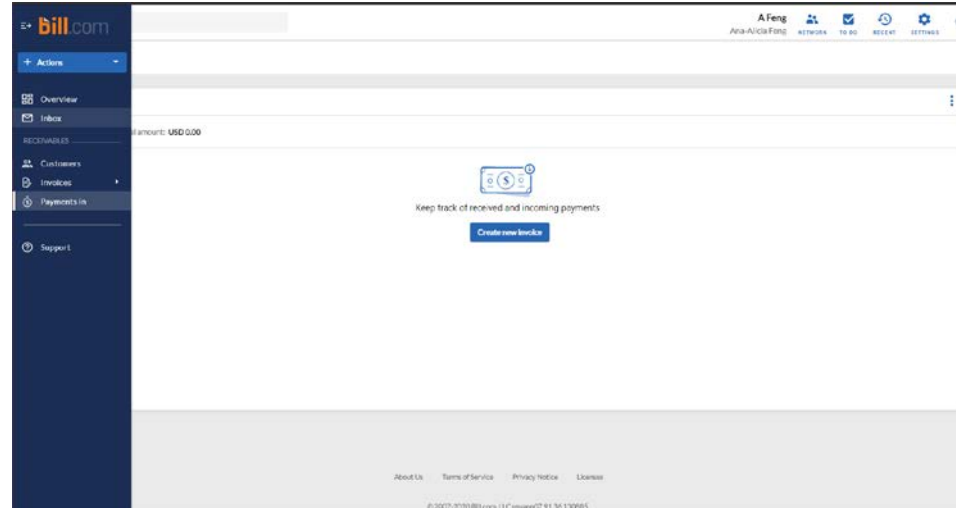


NAVIGATING BILL.COM: UPLOADING A W-9

**If you are an ASPG, PCBPG,
WCPG, or ARSG grantee, you
will need to upload a W-9.**

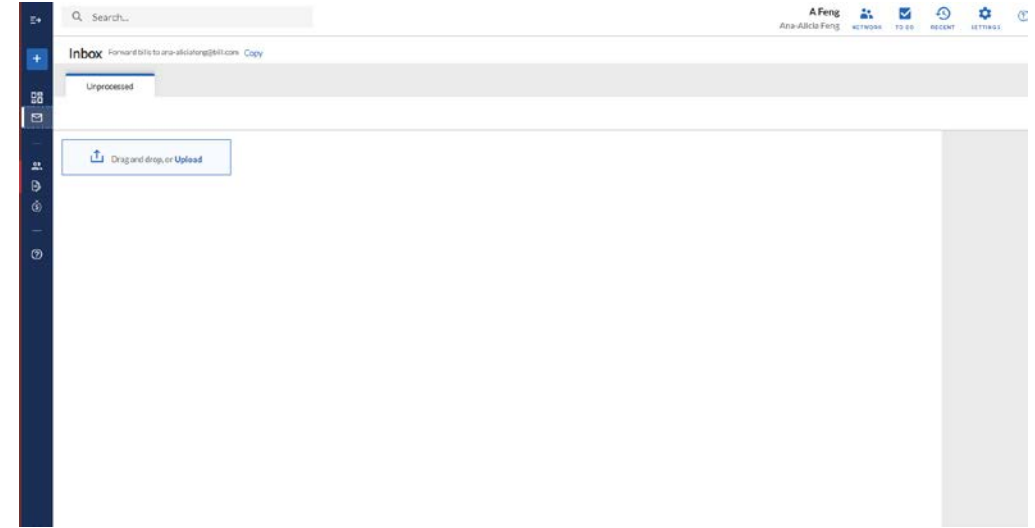
Hover your cursor over the
dark blue navigation bar
on the left-hand side until
it expands.

Click the second option,
which reads "Inbox."



NAVIGATING BILL.COM: UPLOADING A W-9

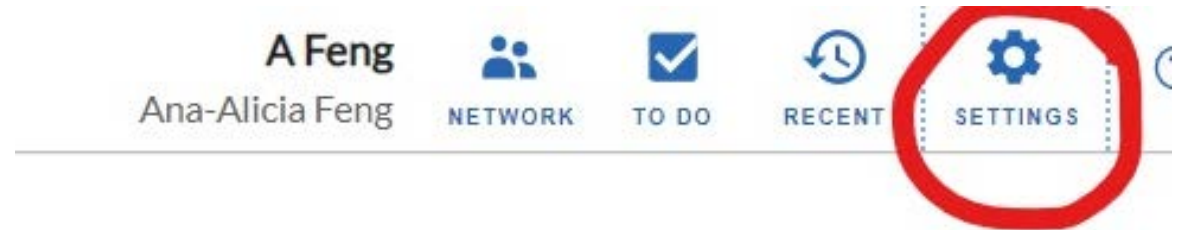
Click the word "Upload"
bolded in blue to upload
your W-9, if required.



SETTINGS

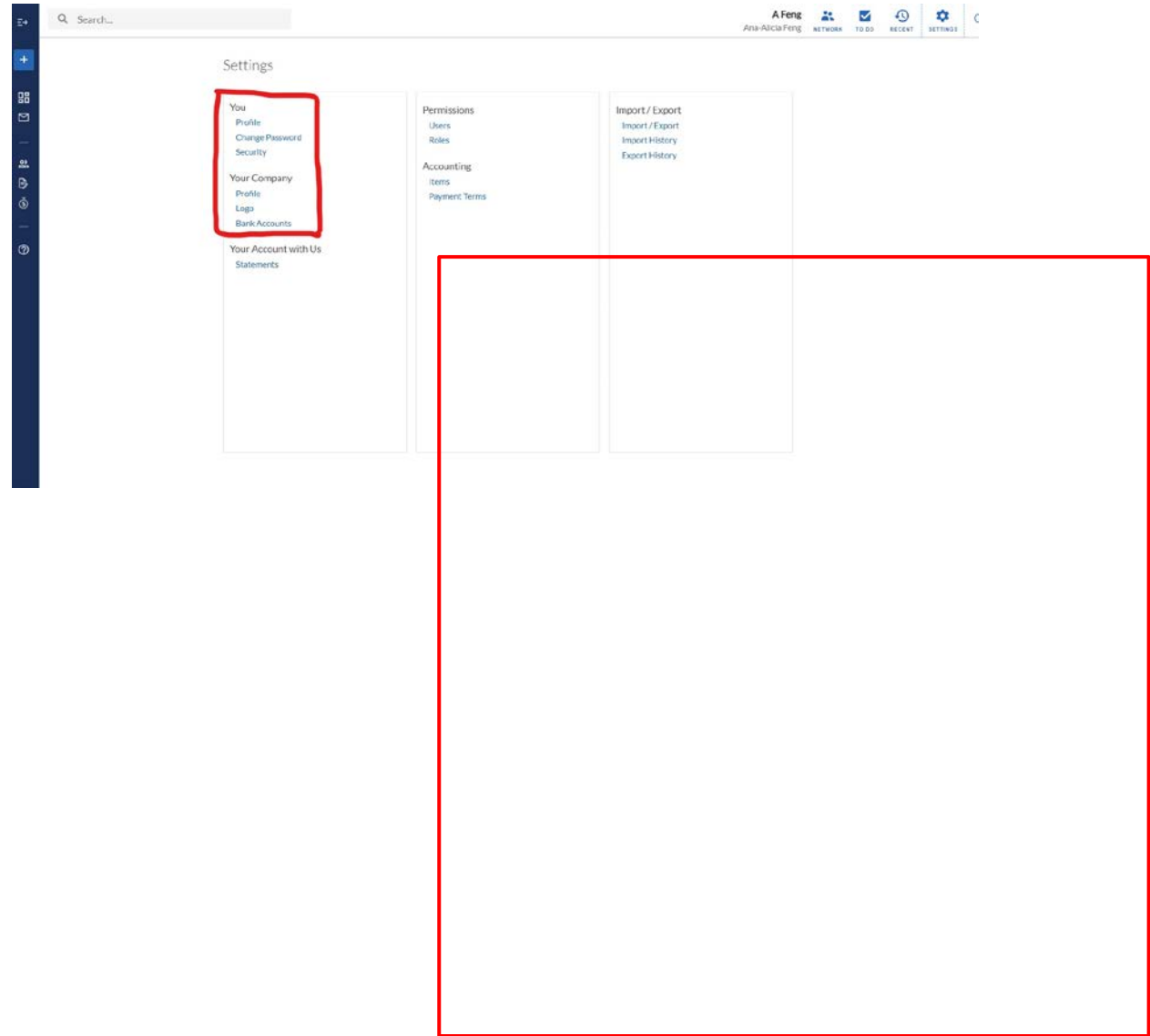
Need to edit your profile,
password, or bank
account?

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".

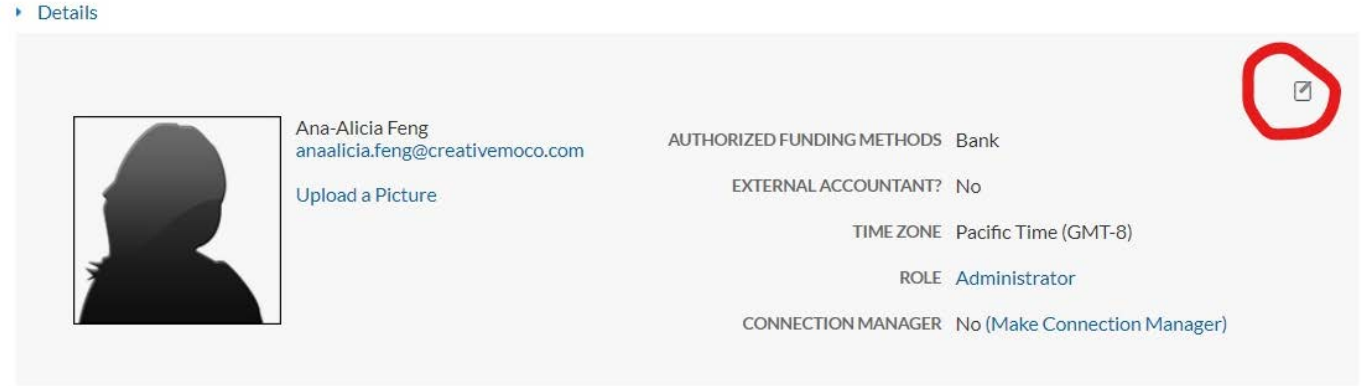


SETTINGS: YOUR PROFILE

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 the user's name and email, a placeholder for a profile picture, and various system settings. A red circle highlights a small icon in the top right corner.

Ana-Alicia Feng
anaalicia.feng@creativemoco.com

Upload a Picture

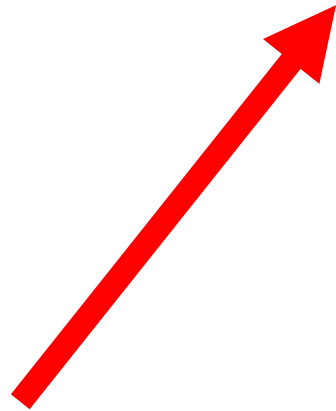
AUTHORIZED FUNDING METHODS Bank

EXTERNAL ACCOUNTANT? No

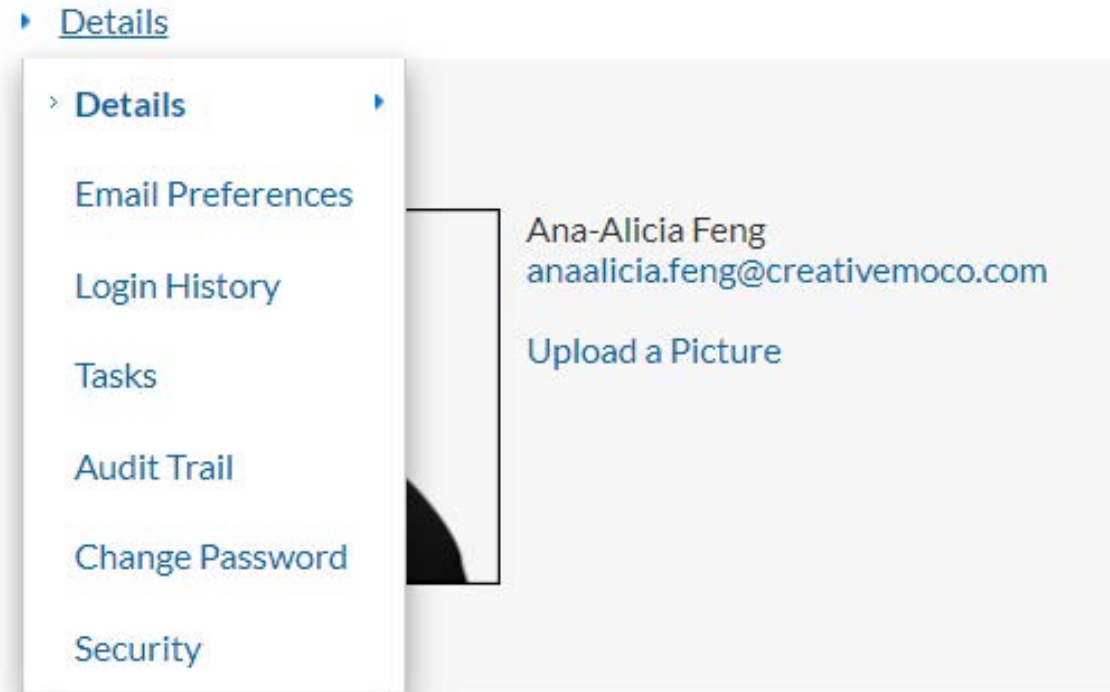
TIME ZONE Pacific Time (GMT-8)

ROLE Administrator

CONNECTION MANAGER No (Make Connection Manager)



▸ Details



The profile card is shown with a dropdown menu open over the 'Details' link. The menu lists several options: Details, Email Preferences, Login History, Tasks, Audit Trail, Change Password, and Security.

▸ Details

> Details

Email Preferences

Login History

Tasks

Audit Trail

Change Password

Security

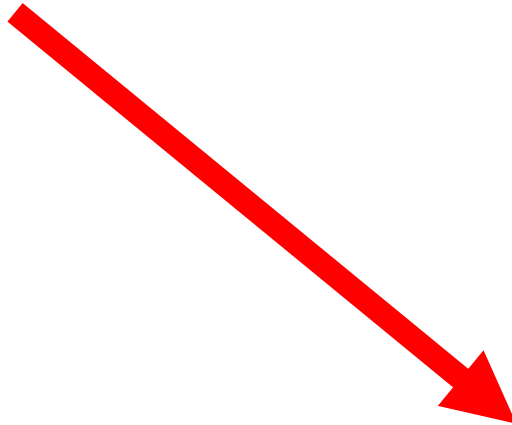
Ana-Alicia Feng
anaalicia.feng@creativemoco.com

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: 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 [?]	<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	Add a logo	
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: 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

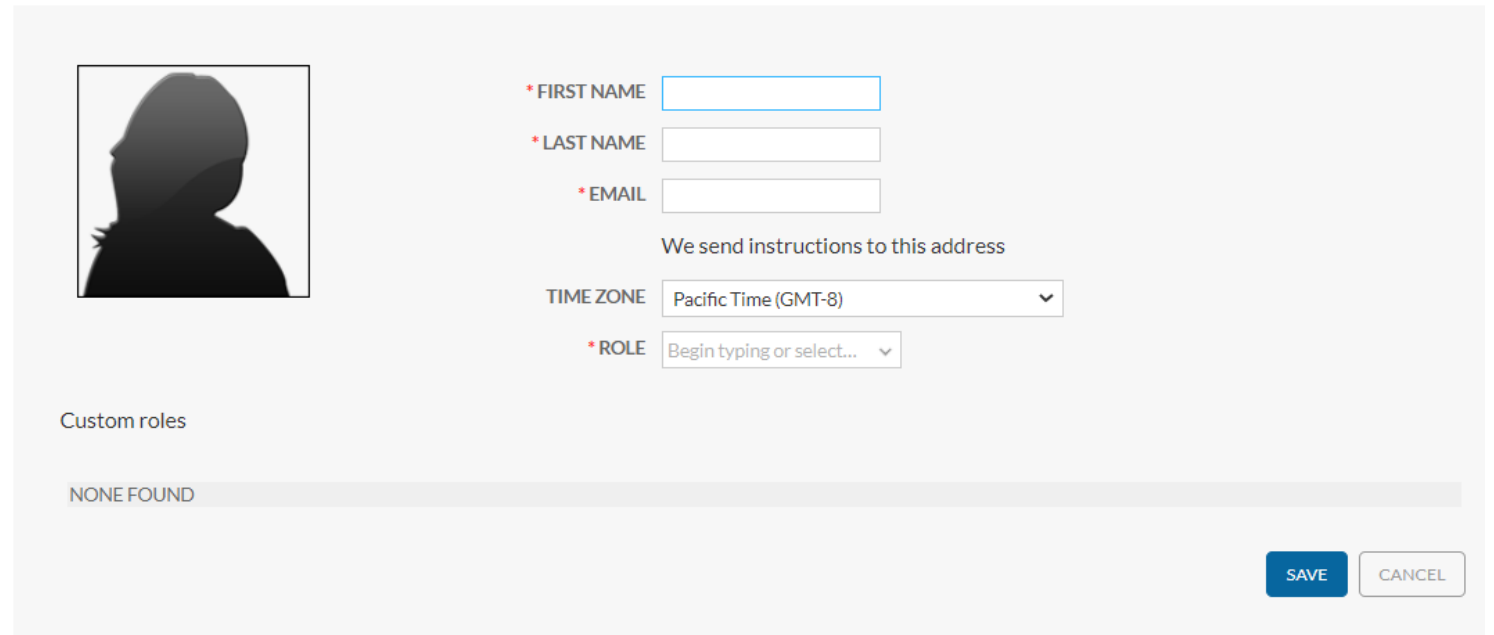


SETTINGS: USERS

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



A user profile form with a silhouette placeholder for a profile picture. The form includes input fields for First Name, Last Name, and Email, each with a red asterisk indicating it is required. Below the email field is a note: "We send instructions to this address". There are dropdown menus for Time Zone (set to "Pacific Time (GMT-8)") and Role (set to "Begin typing or select..."). A section for "Custom roles" shows "NONE FOUND". At the bottom right are "SAVE" and "CANCEL" buttons.

* FIRST NAME

* LAST NAME

* EMAIL

We send instructions to this address

TIME ZONE

* ROLE

Custom roles

NONE FOUND

SAVE CANCEL



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

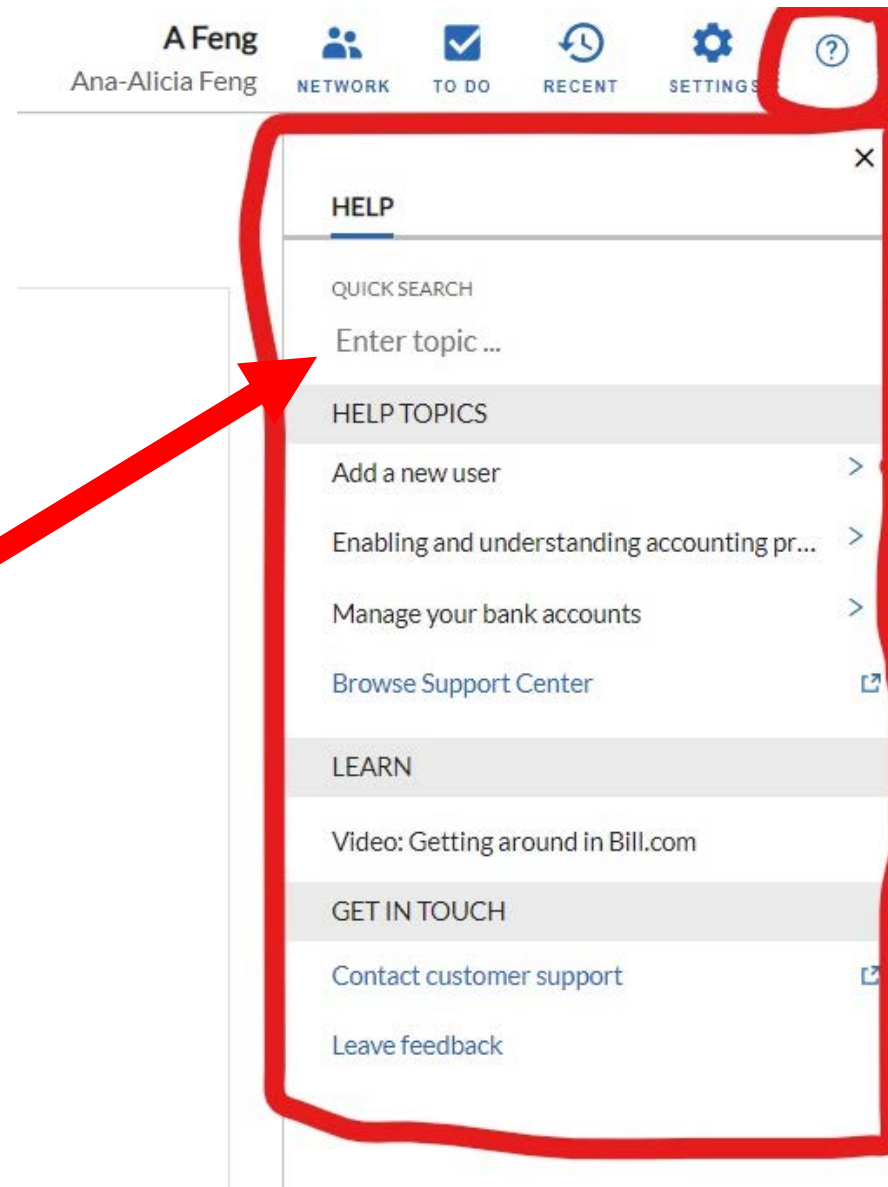
CONNECTION MANAGER No (Make Connection Manager)



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.



QUESTIONS?

EMAIL THE AHC MC GRANTS TEAM

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