

# Guide to Bill.com for AHCMC Grantees



# 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:	<input type="text"/>
*Phone Number:	<input type="text"/>
*Email:	<input type="text"/>

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

Email invitations are not automatic and may take a few days.

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](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/invite/signup?invite=BCBD2B35F6C8257B3A9C7C3656B8808807BB442B044469F56081FE48C13A0529&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.

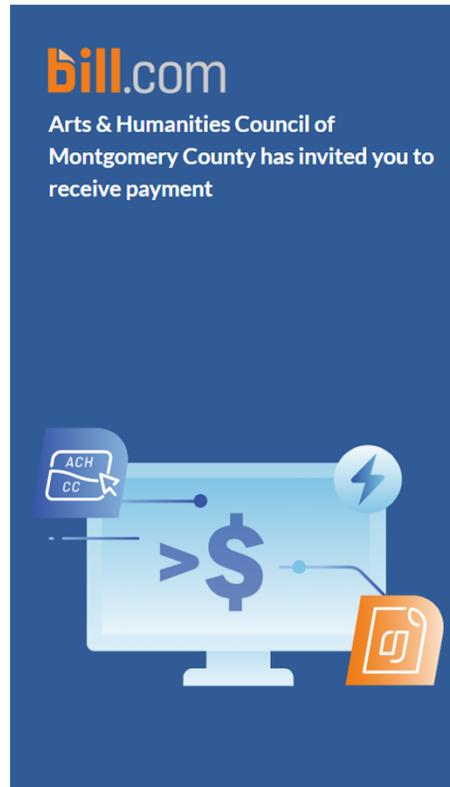
Please don't reply to this automated email.

© 2007-2020 Bill.com, LLC  
snwworker3.90.29 128506 OTID0069-05G

# 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.

---



## 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

In the next 2 steps, Bill.com will ask you a couple of questions for their records.

**The most important and relevant information needed is your name or organization name, address, and bank information.**

All other information is for Bill.com's internal use and will have no effect on your account or on your account's ability to receive grant disbursements.

---

# ACCOUNT SETUP: CATEGORY

Pick either of the first two options. This is for Bill.com's internal use, but your account will look and function the same with either option.

**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: 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

Ana-Alicia Feng

Phone

required

Address line 1

required

+ Address line 2

City

required

State

Zip

Next

# A NOTE ABOUT ACCOUNT SETUP

At this point Bill.com may ask you required questions about:

- Industry Type
- Business Type
- Accounting Software

**Fill this out to the best of your abilities but know that this information is for Bill.com's internal use 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.

---

# 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

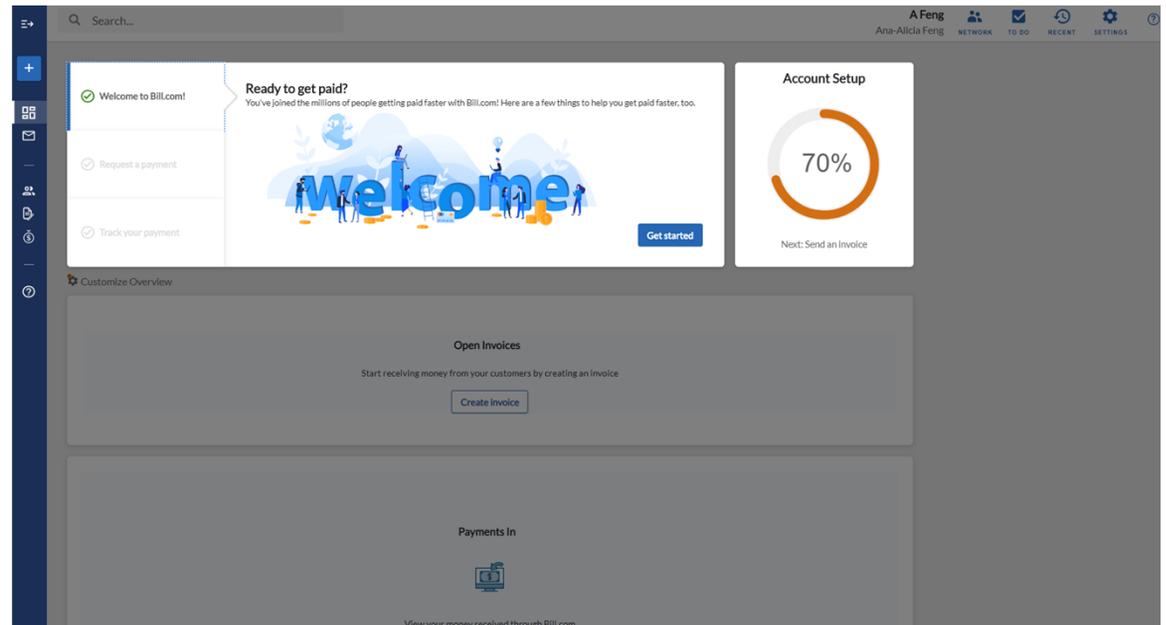
Personal Checking ▼

[Need help?](#) [Save and finish](#)

# YOUR ACCOUNT HAS BEEN CREATED

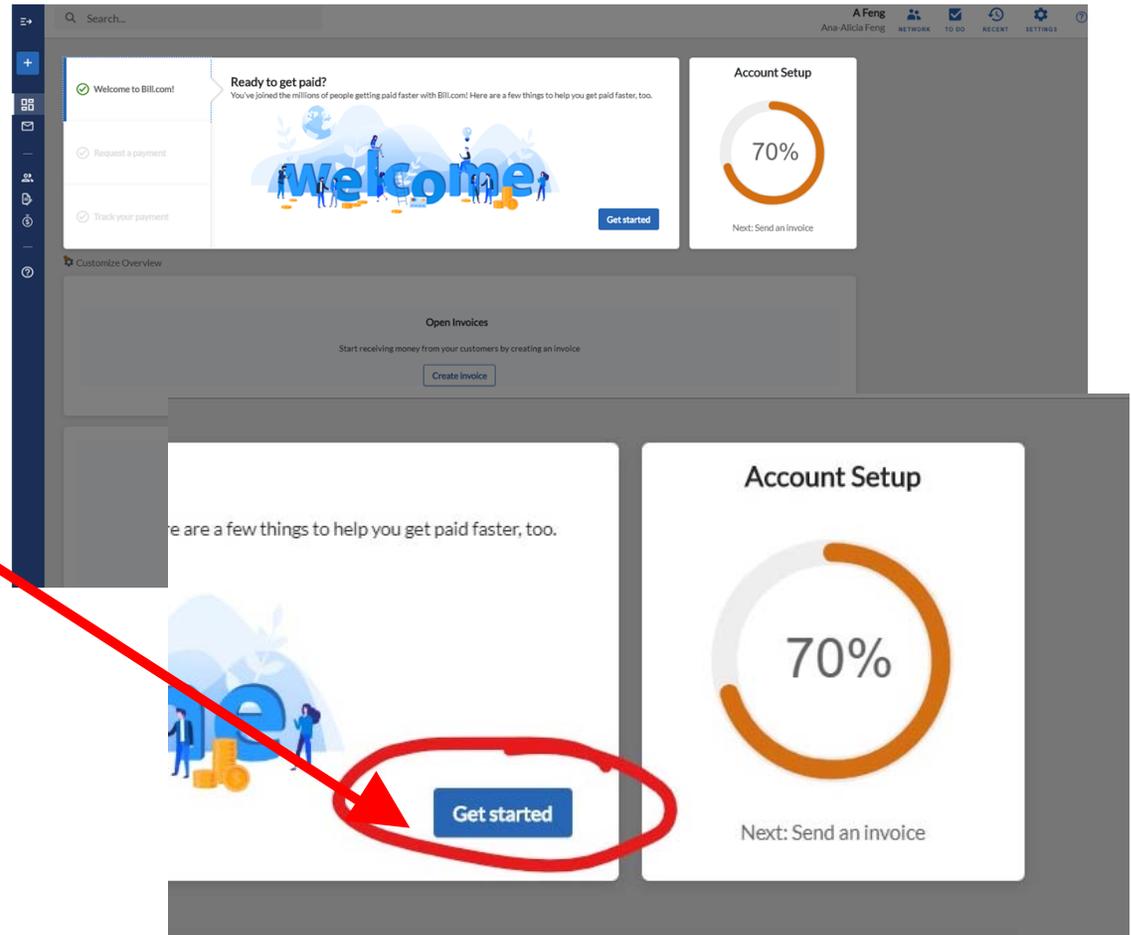
This is the next page after you finish creating your account.

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 interface. At the top, there is a search bar and a user profile for 'A Feng' with the name 'Ana-Alicia Feng' and icons for 'NETWORK', 'TO DO', 'RECENT', and 'SETTINGS'. The main content area is divided into several sections:

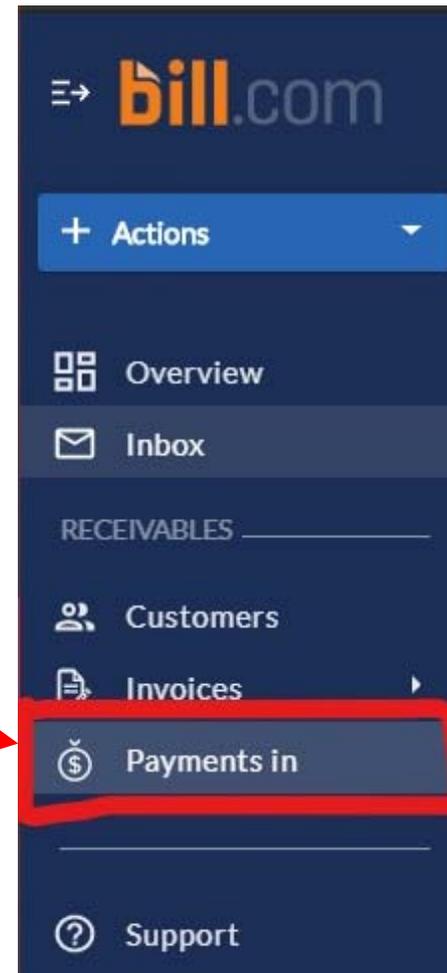
- Welcome to Bill.com!**: A green checkmark icon and a list of actions: 'Request a payment' and 'Track your payment'.
- Have an invoice ready?**: A section for creating an invoice. It includes a 'COMPANY NAME' field with a dropdown menu showing 'Arts & Humanities Council of Montgomery County' and an '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 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, mail, calendar, and settings.

# NAVIGATING BILL.COM: PAYMENTS

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

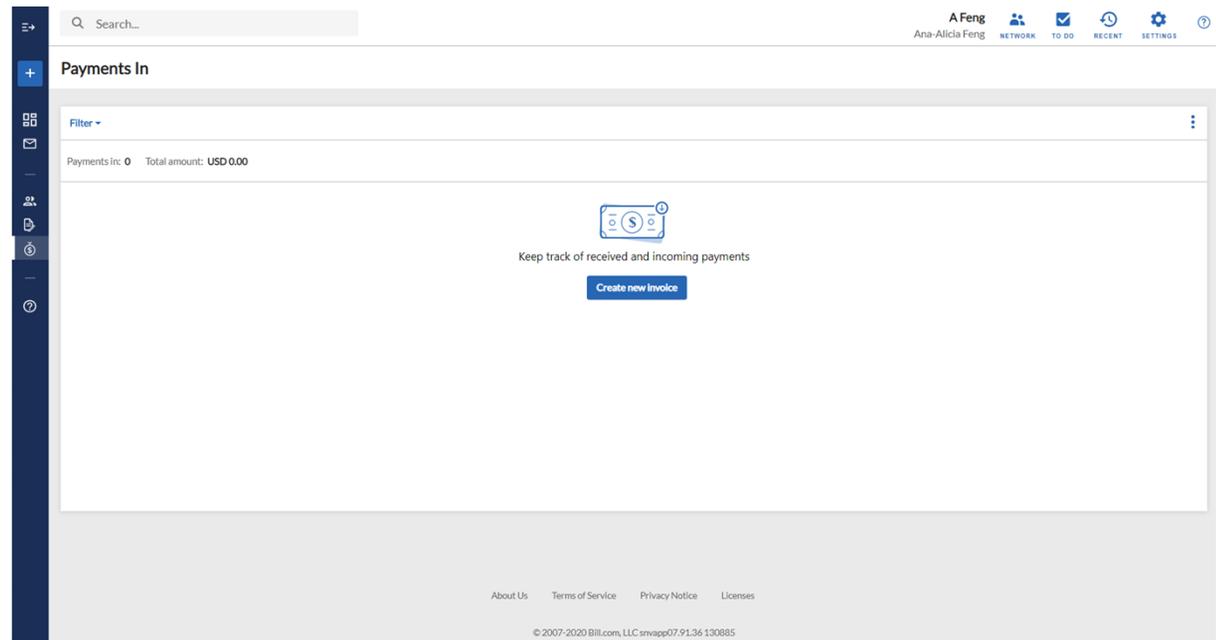
Click on the option that reads "Payments in".



# NAVIGATING BILL.COM: PAYMENTS

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

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



# A NOTE ABOUT INVOICES

**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
-

# SUBMITTING A W-9

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

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

- Send an email to AHCMC's Bill.com email with the W-9 attached ([arthumanitiescouncilofmontgomerycounty@bill.com](mailto:arthumanitiescouncilofmontgomerycounty@bill.com))
- Submit a **blank** invoice within the Bill.com system with the W-9 attached

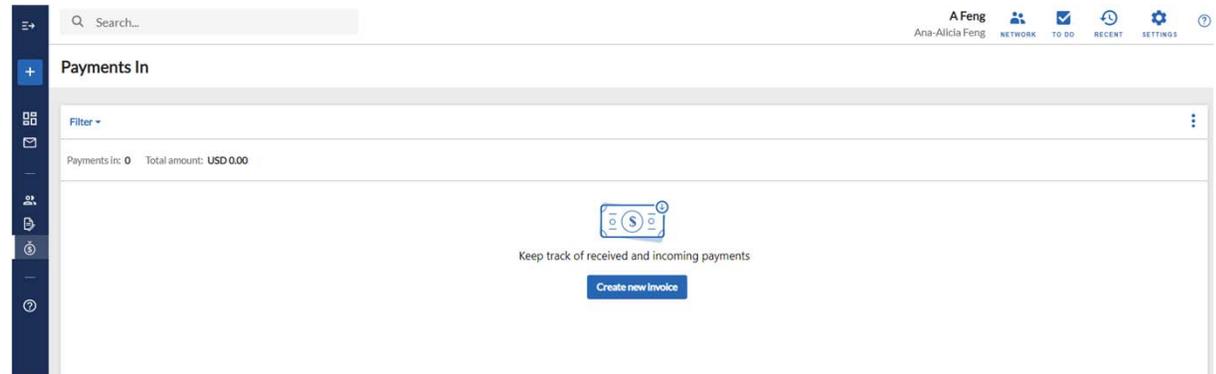
The second method is an option for grantees that do not feel comfortable sending a W-9 by email for security reasons.

---

# NAVIGATING BILL.COM: UPLOADING 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: UPLOADING 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: UPLOADING 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)

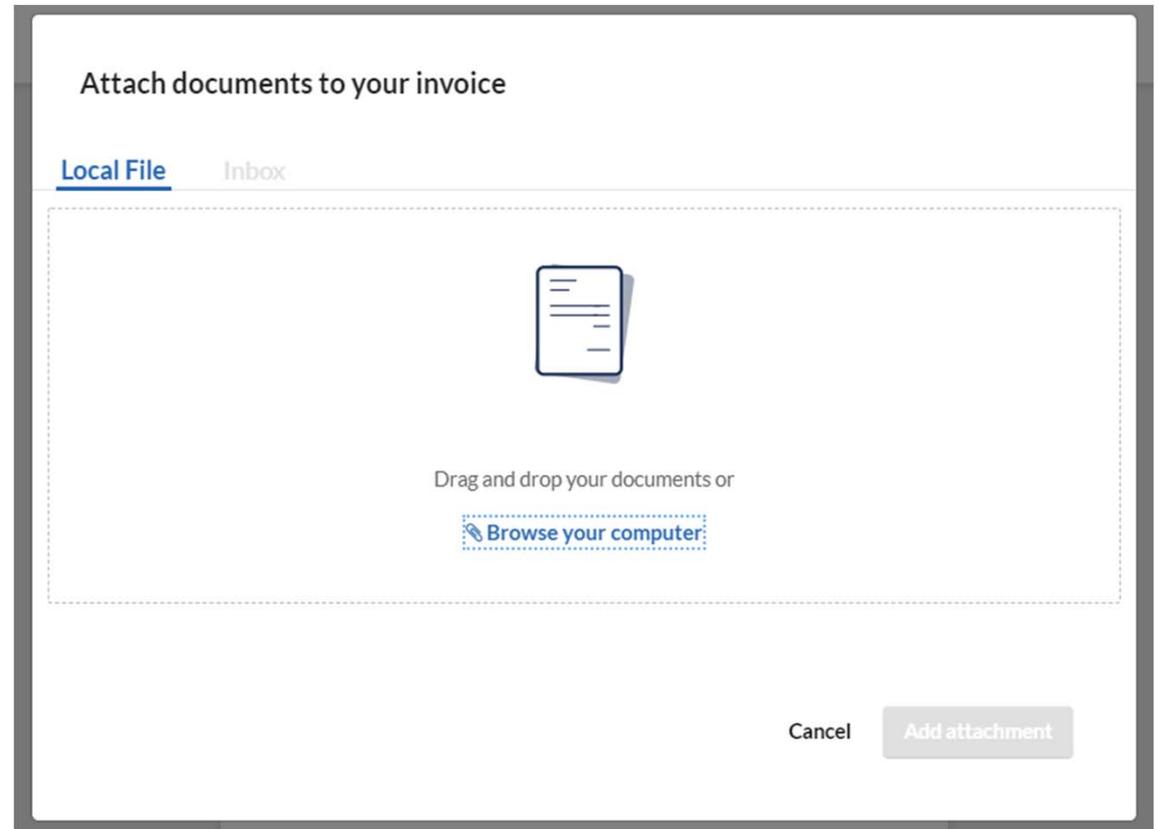
Use advanced invoices (invoice date, payment terms, tax, and more)

Total USD 0.00

# NAVIGATING BILL.COM: UPLOADING 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: UPLOADING 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: UPLOADING 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: UPLOADING 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 \*

cc

Subject \*

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: UPLOADING A W-9 WITH A BLANK INVOICE

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

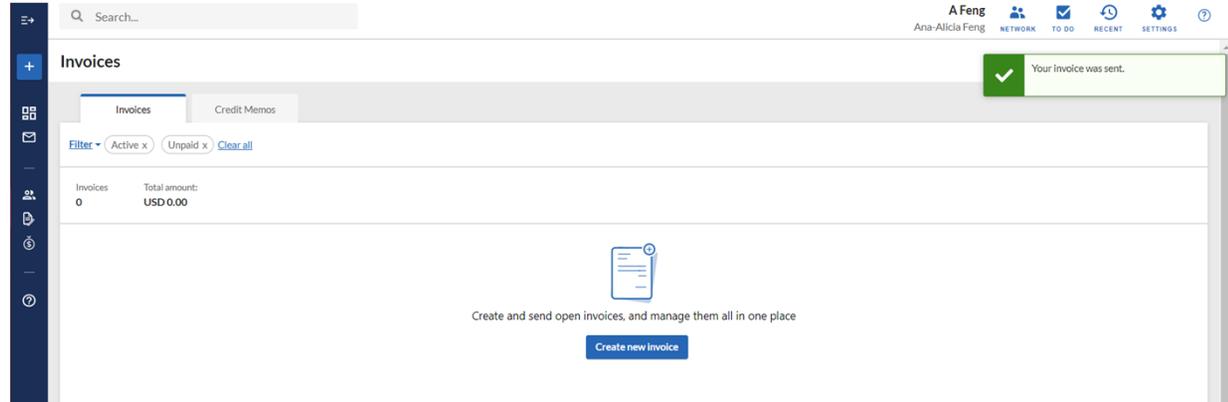
If you wish to cancel this invoice, click the blue "x" in the upper left-hand corner until you see your Bill.com dashboard again.

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 two buttons: 'Edit' and 'Send'. Below the buttons, there is a message: 'Your invoice will be sent in the Bill.com Network' followed by 'We'll send this invoice to Arts & Humanities Council of Montgomery County and notify you once it has been paid.' Below this is an 'OPTIONAL—NOTIFY OTHERS BY EMAIL' section with a toggle switch and the text 'Send this invoice to additional email addresses.' Underneath is an 'Attachments:' section with a file named 'FY21\_Grants Awarded.pdf'. The main part of the interface is a preview of an invoice. 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. The 'Bill To:' section lists 'Arts & Humanities Council of Montgomery County, 801 Ellsworth Drive, Silver Spring, MD 20910, United States'. A 'Due Date' box shows '09/30/20'. On the right side of the invoice preview, there is a table with the following data:

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

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

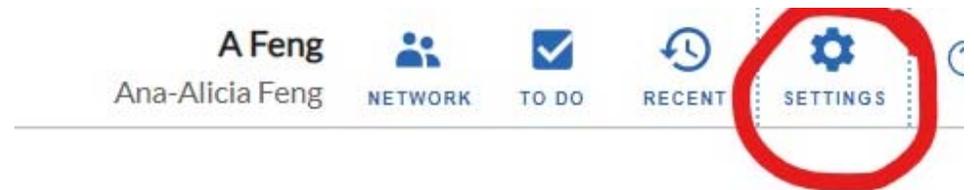
When your invoice is sent, you will see a green confirmation message in the upper right-hand corner.



# SETTINGS

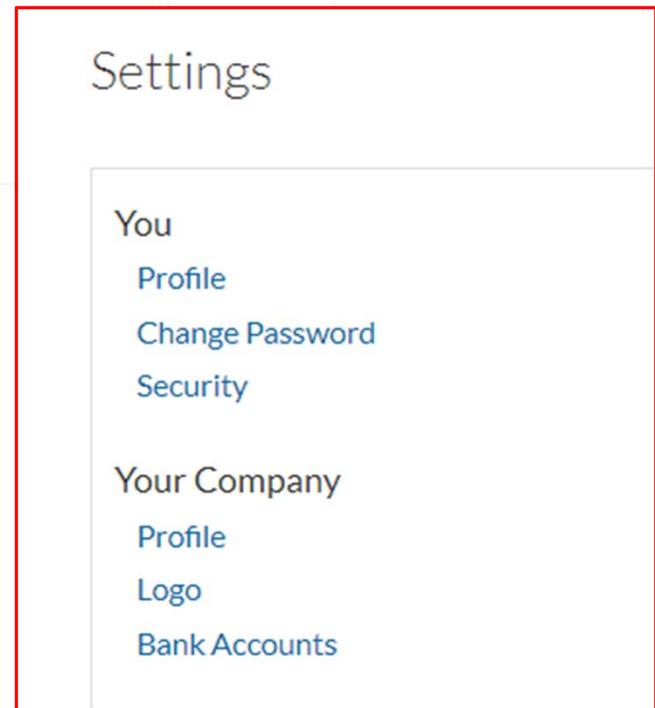
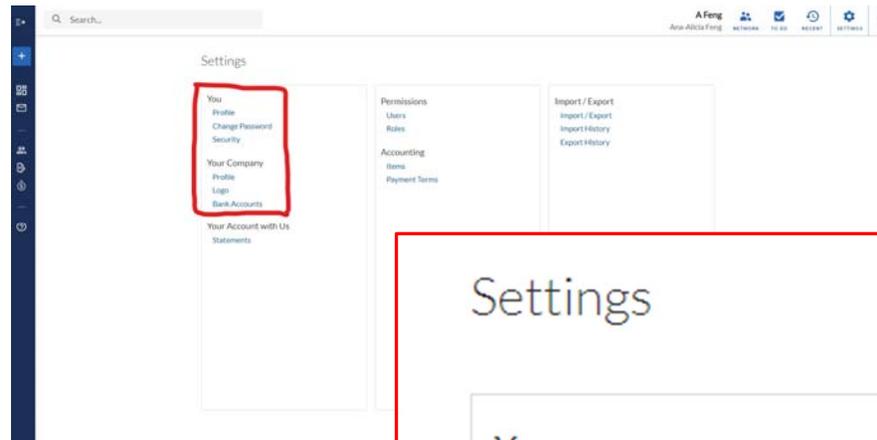
Need to edit your profile,  
password, or bank  
account?

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".



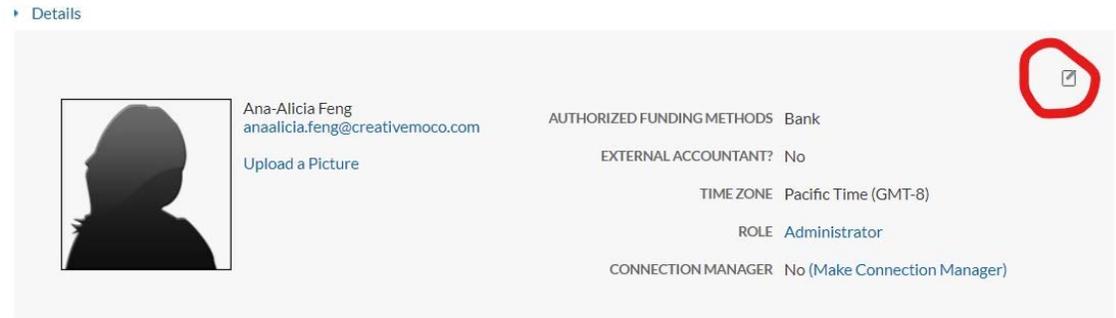
## Settings

- 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

Ana-Alicia Feng  
anaalicia.feng@creativemoco.com

Upload a Picture

AUTHORIZED FUNDING METHODS Bank

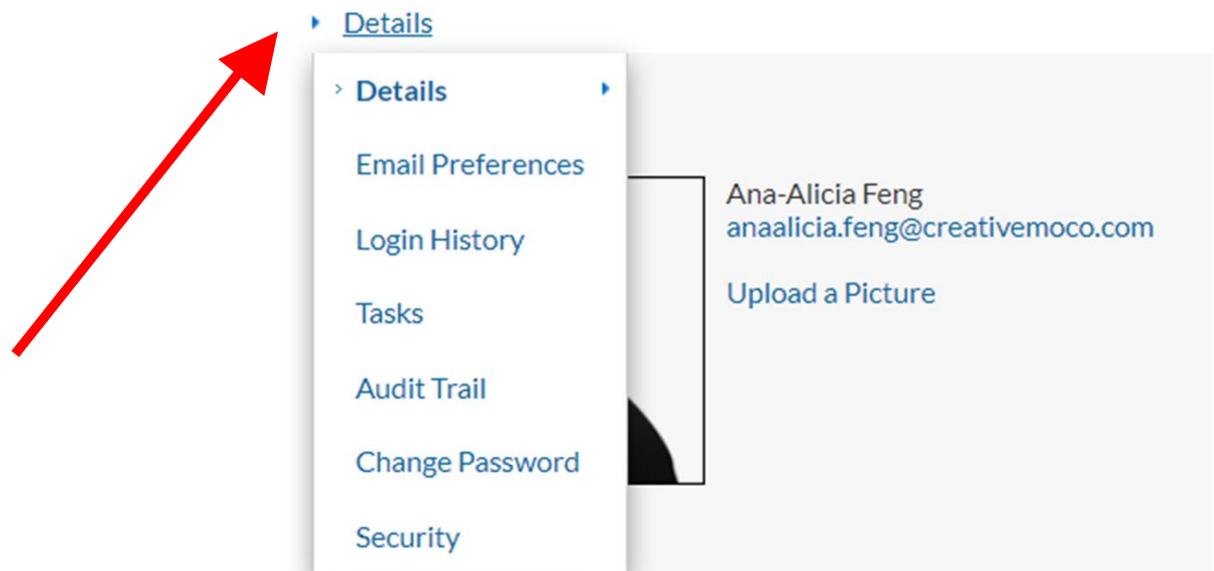
EXTERNAL ACCOUNTANT? No

TIME ZONE Pacific Time (GMT-8)

ROLE Administrator

CONNECTION MANAGER No (Make Connection Manager)

A red circle highlights a small icon in the top right corner of the profile card.



Details

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

Ana-Alicia Feng  
anaalicia.feng@creativemoco.com

Upload a Picture

A red arrow points from the text on the left to the 'Details' link in the dropdown menu.

# SETTINGS: COMPANY PROFILE

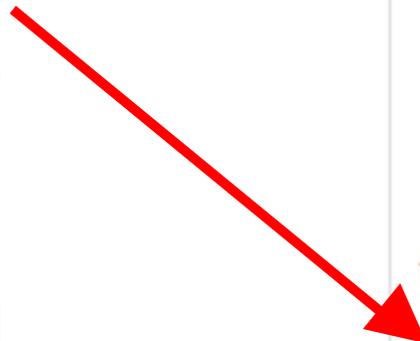
Back on your general "Settings" page, click on the second "Profile" under the header "Your Company".

**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

\* DISPLAY NAME

\* PHONE

URL

COMPANY LOGO [Add a logo](#)

ABOUT

Company Location

\* COUNTRY

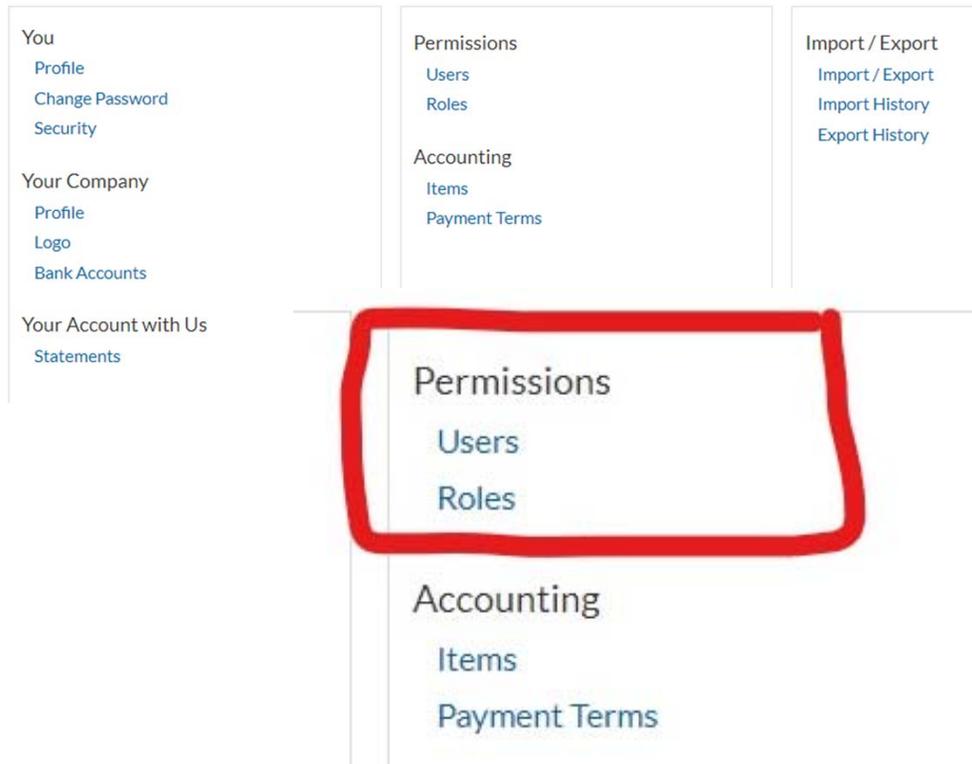
\* ADDRESS

# 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



The screenshot shows a settings menu with three columns. The first column contains 'You' (Profile, Change Password, Security), 'Your Company' (Profile, Logo, Bank Accounts), and 'Your Account with Us' (Statements). The second column contains 'Permissions' (Users, Roles), 'Accounting' (Items, Payment Terms), and 'Accounting' (Items, Payment Terms). The third column contains 'Import / Export' (Import / Export, Import History, Export History). A red box highlights the 'Users' link under the 'Permissions' header in the second column.

You	Permissions	Import / Export
<a href="#">Profile</a>	<a href="#">Users</a>	<a href="#">Import / Export</a>
<a href="#">Change Password</a>	<a href="#">Roles</a>	<a href="#">Import History</a>
<a href="#">Security</a>	Accounting	<a href="#">Export History</a>
Your Company	<a href="#">Items</a>	
<a href="#">Profile</a>	<a href="#">Payment Terms</a>	
<a href="#">Logo</a>		
<a href="#">Bank Accounts</a>		
Your Account with Us		
<a href="#">Statements</a>		

# 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...

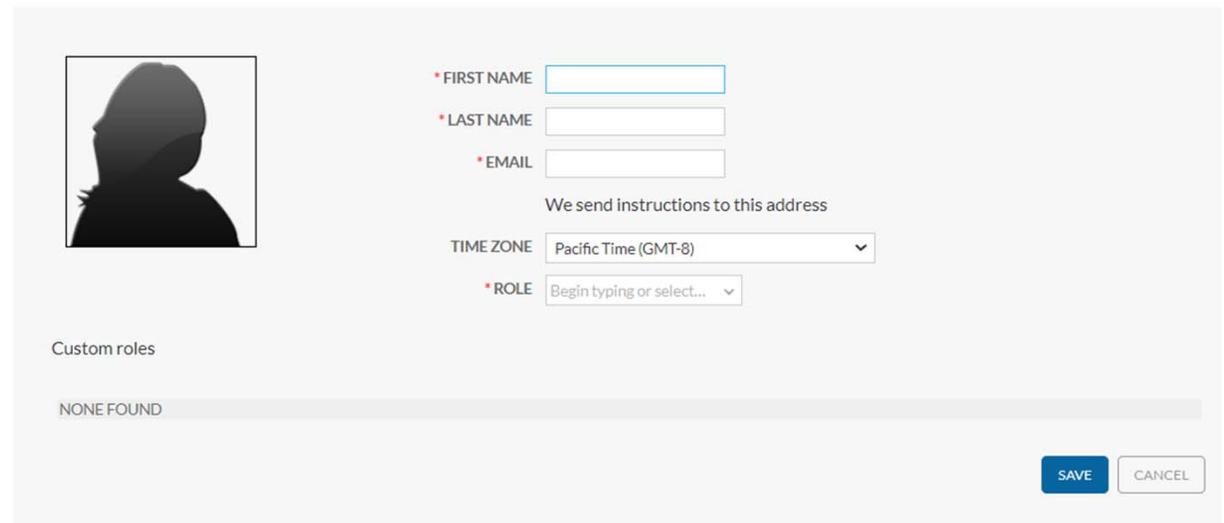
Show Inactive Users

# 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 screenshot of a user profile form. On the left is a placeholder for a profile picture, showing a black silhouette of a person's head and shoulders. To the right are several input fields: 'FIRST NAME', 'LAST NAME', and 'EMAIL', each with a red asterisk indicating it is required. Below these is a note 'We send instructions to this address' followed by a 'TIME ZONE' dropdown menu currently set to 'Pacific Time (GMT-8)'. At the bottom of the form fields is a 'ROLE' dropdown menu with the text 'Begin typing or select...'. Below the form fields is a section titled 'Custom roles' which contains the text 'NONE FOUND'. At the bottom right of the form are two buttons: a blue 'SAVE' button and a white 'CANCEL' button with a grey border.

\* 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)

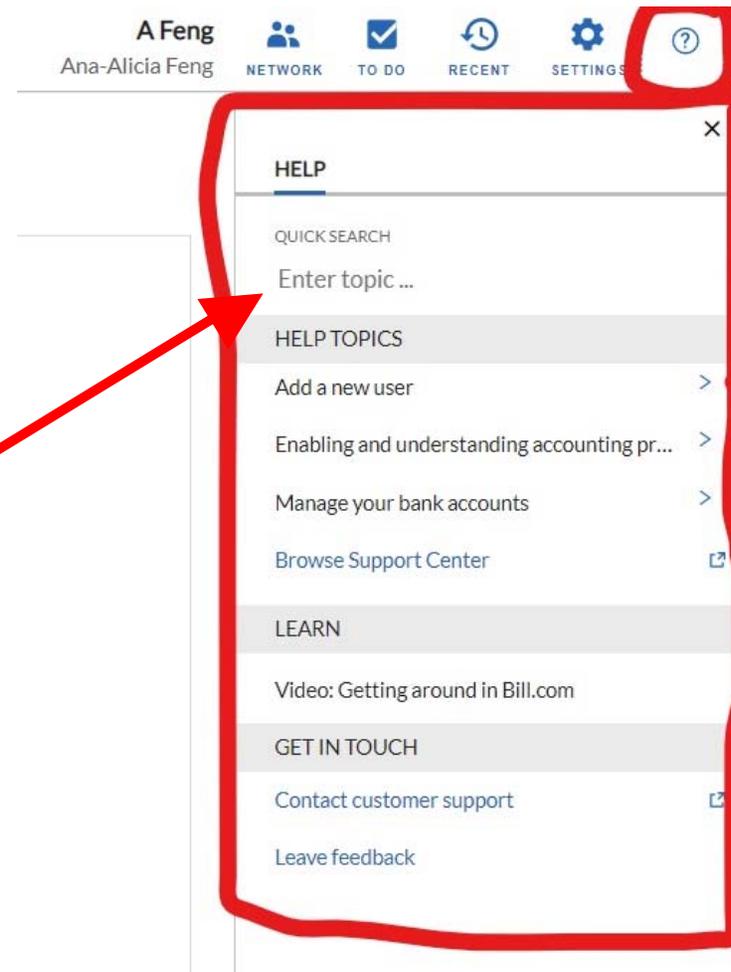
ROLE Administrator

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

### **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