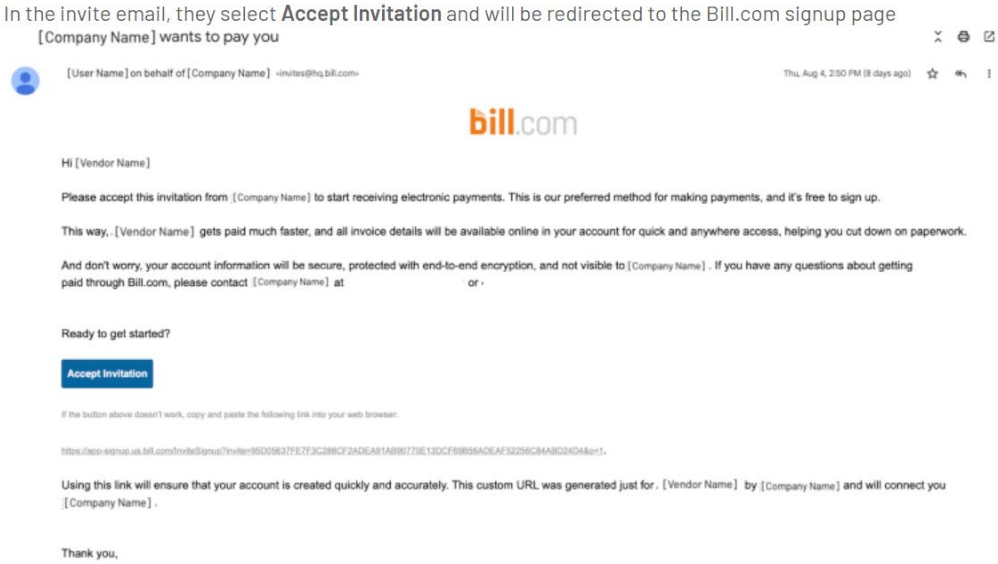
Bill.com Steps

Chapters will need to have a bill.com account in order to receive payments from SHPE.

Make sure to wait to create the account until you receive the invitation from SHPE. Please reach out to fianance@shpe.org to start the process and with any questions.

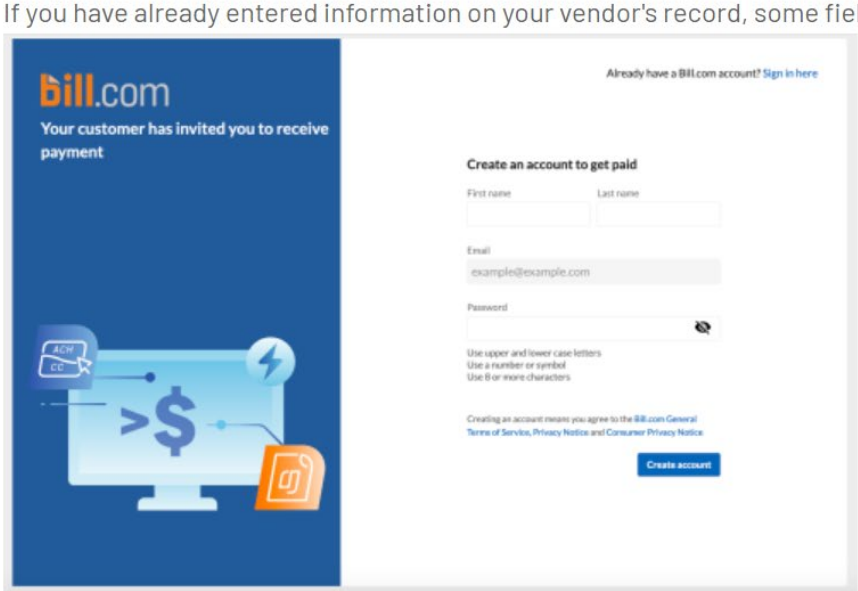
When the vendor accepts your invite

1. In the invite email, they select **Accept Invitation** and will be redirected to the Bill.com signup page



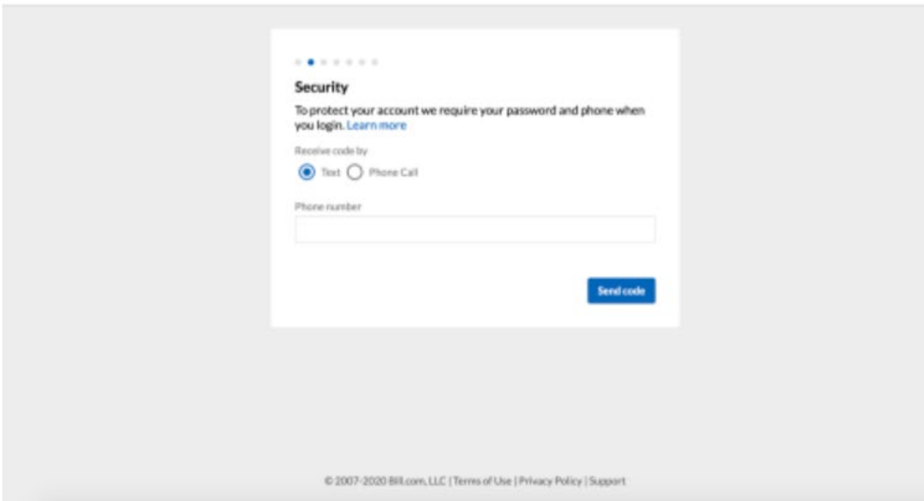
Then:

2. They'll then fill out some information about themselves and create a password, then select **Create account**
   - If you have already entered information on your vendor's record, some fields will be pre-filled



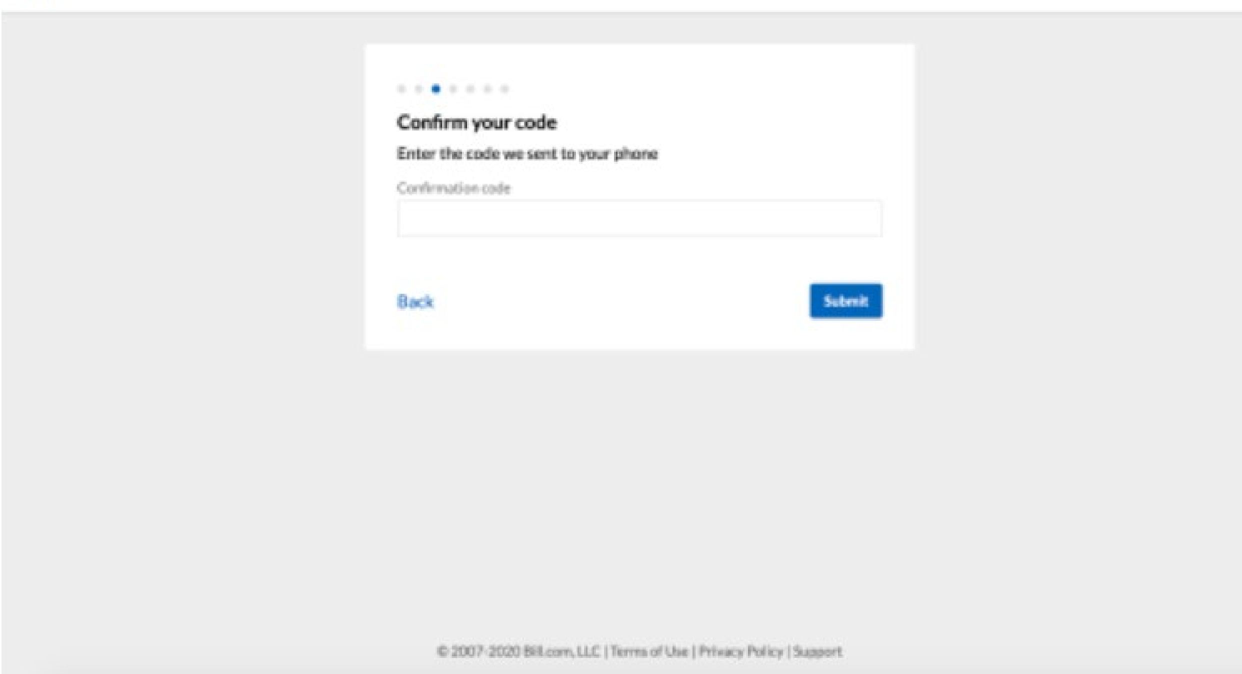
Then:

3. They'll then enter their mobile number for 2-step verification and select **Send code**
    - This is the number where we'll send a code to verify them when they log in, add a bank, or add users



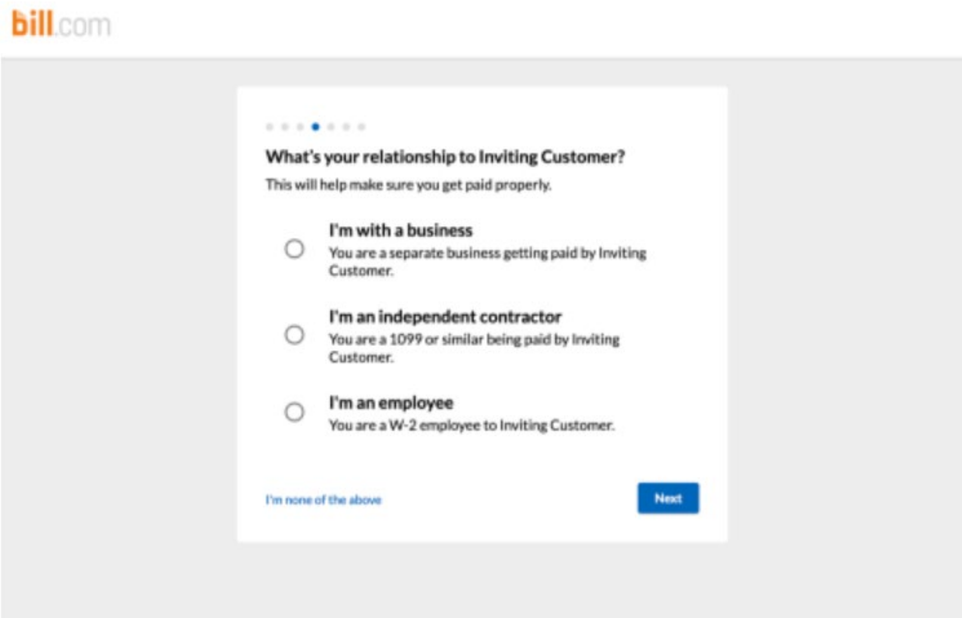
Then:

4. They'll then enter the six-digit code we send them and select **Submit**



Then:

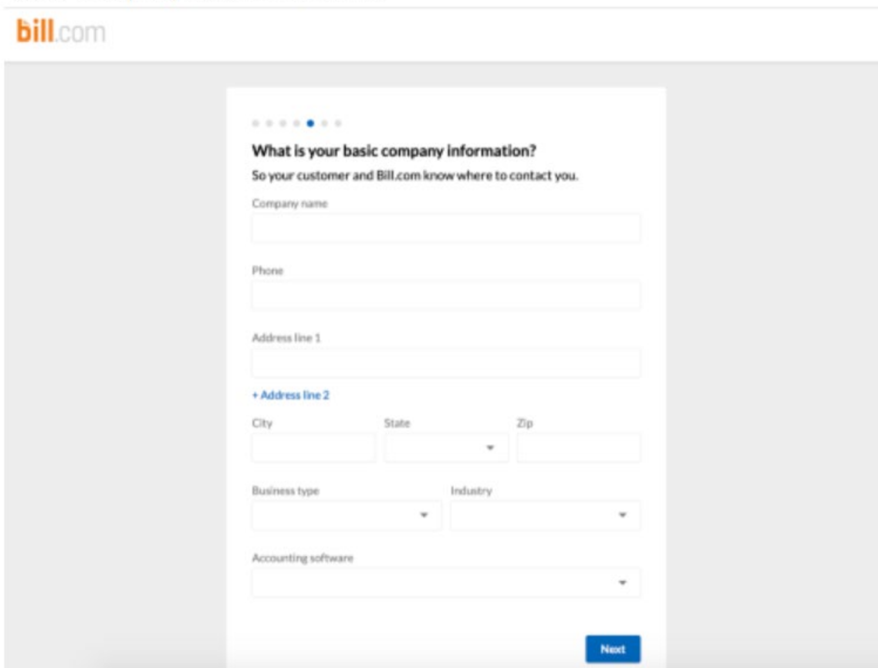
5. They'll then select their account type



You will select “I'm an Independent Contractor”. Please note you will be required to submit your personal information such as your SSN.

Then:

6. Then they enter some information about
    - Their company and select **Next**

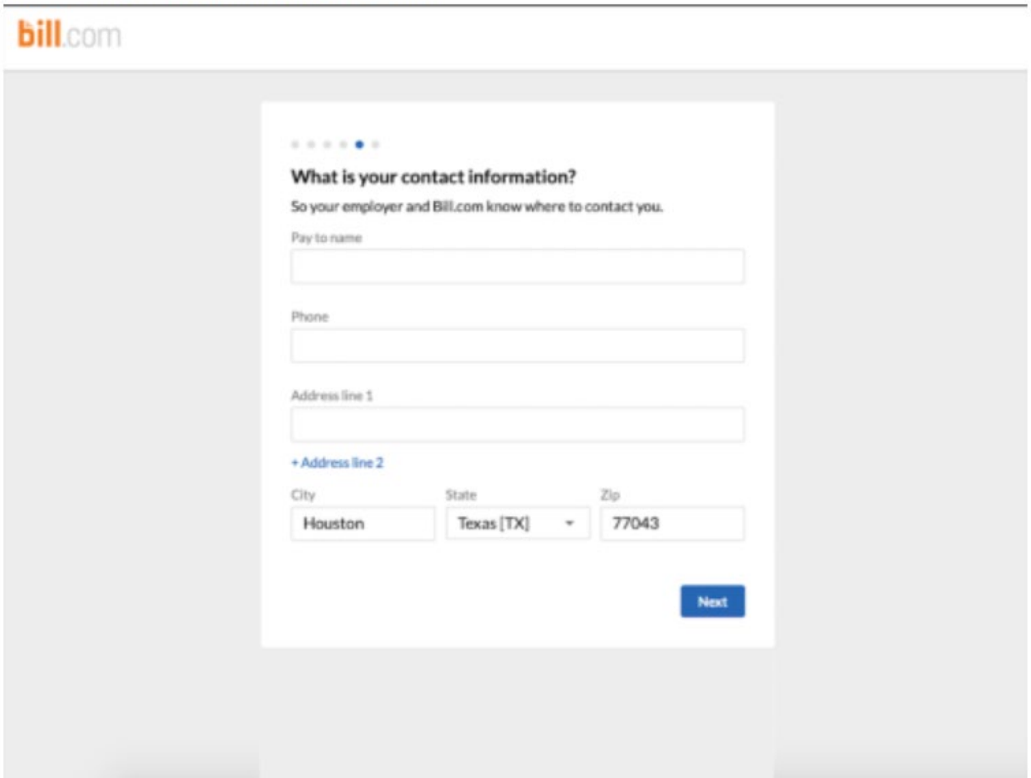


You will “Add your Personal Information”

- Under “Industry”- please choose field what best describes you. For Example: Education.
- Under Accounting Software – please choose “ No to using a software”

Then:

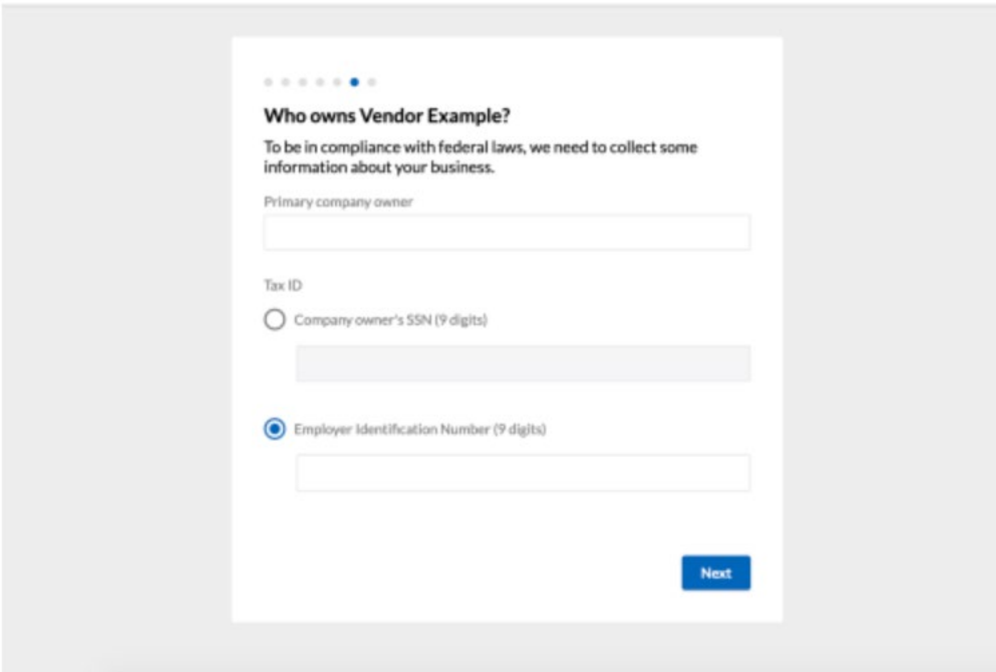
- Or themselves and select **Next**



You will continue to “Add your Personal Information”

Then:

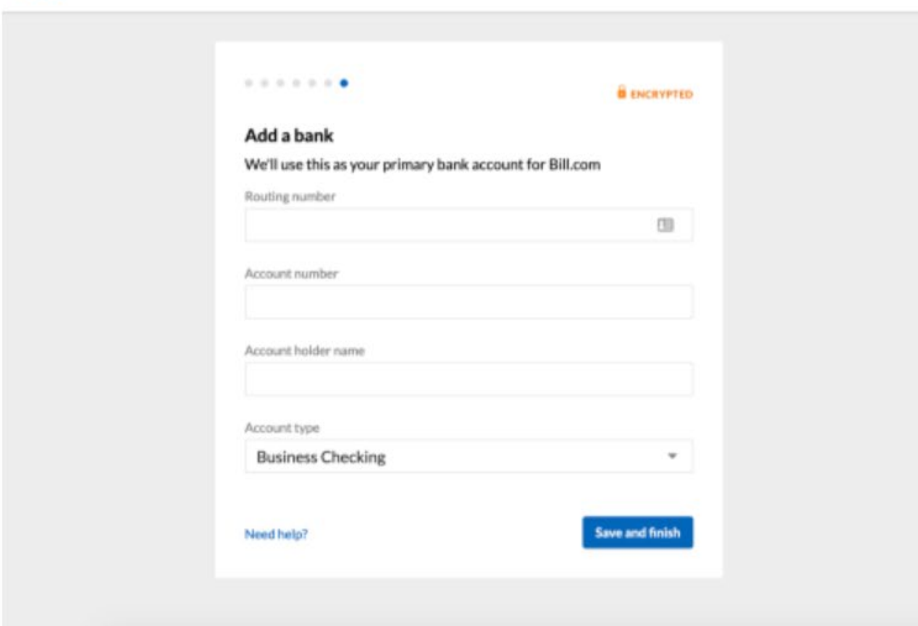
7. If they're with a business, they'll need to enter the company owner's information
    - This information is required by federal compliance laws



You will continue to "Add your Personal Information"

Then:

8. They'll then enter their bank account information
    - We'll send a test deposit of $0.01 (a penny) to verify their bank account



And that's it! Their subscription-free Basic Receivables account is ready to accept payments from you.

You will "Add your Bank Information"

Then you will click on button: “Save and Finish”