

## Bill.com Steps

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

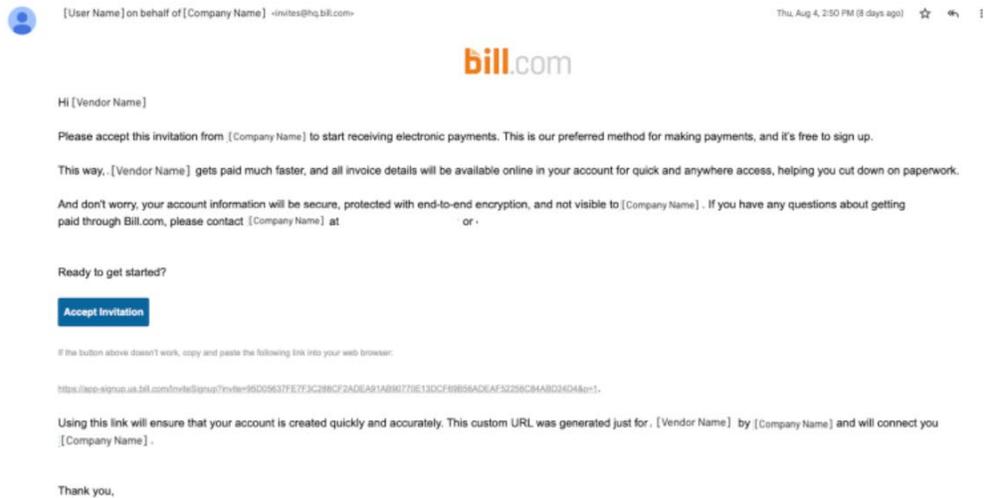
Make sure to wait to create the account until you receive the invitation from SHPE.

Please reach out to [fianance@shpe.org](mailto:fianance@shpe.org) to start the process and with any questions.

### When the vendor accepts your invite

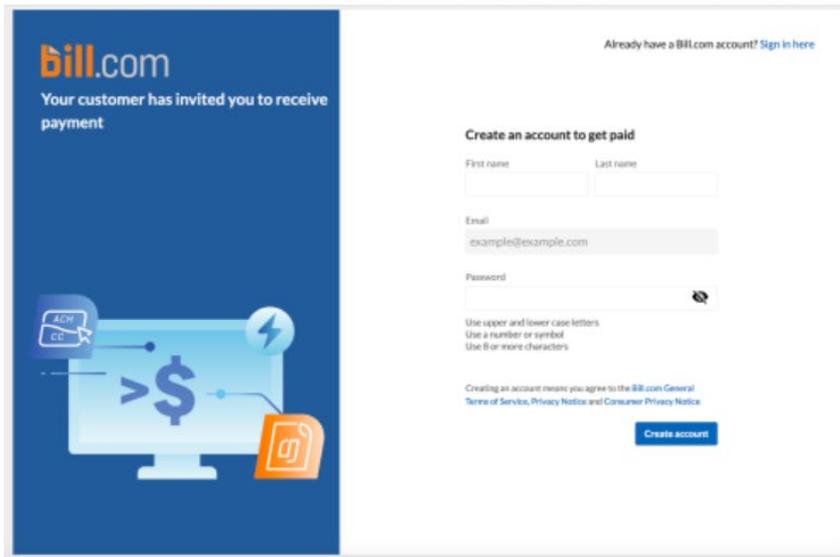


1. In the invite email, they select **Accept Invitation** and will be redirected to the Bill.com signup page  
[Company Name] wants to pay you



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

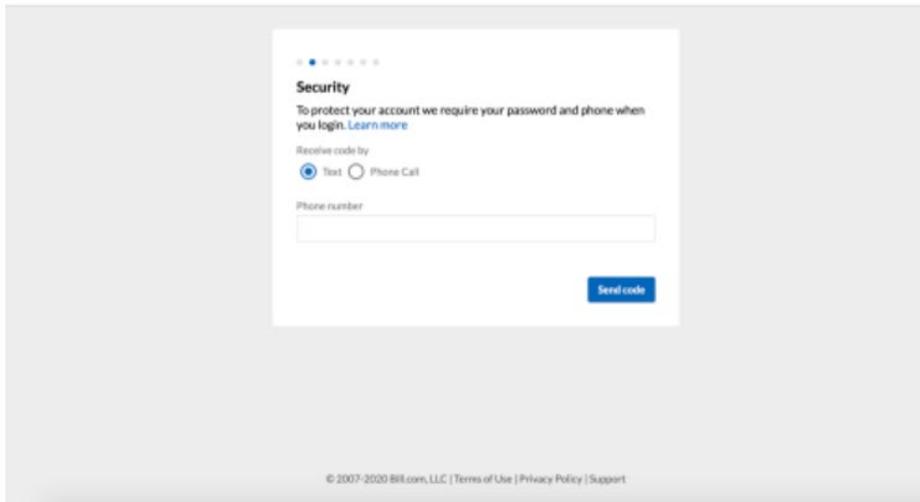


Then:

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

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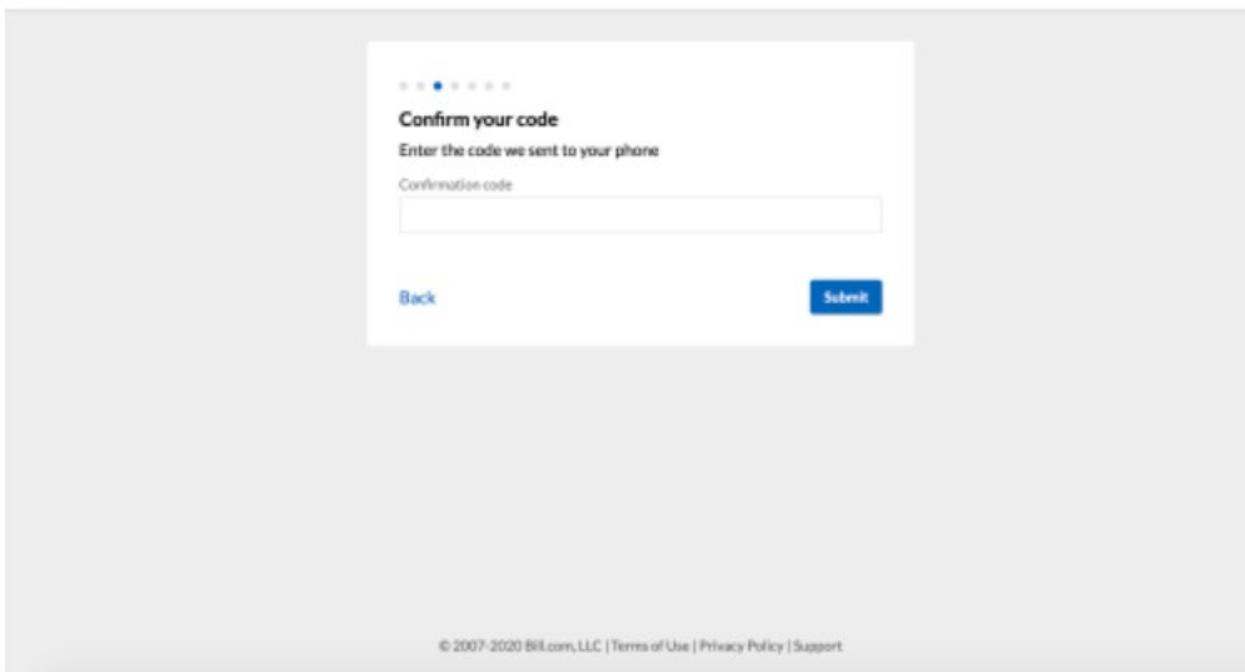


The screenshot shows a white modal window on a grey background. At the top left of the modal is the bill.com logo. Below it is a progress indicator with six dots, the first of which is filled. The heading is "Security". Below the heading is a paragraph: "To protect your account we require your password and phone when you login. [Learn more](#)". Underneath is the text "Receive code by:" followed by two radio buttons: "Text" (which is selected) and "Phone Call". Below that is a text input field labeled "Phone number". At the bottom right of the modal is a blue button labeled "Send code". At the very bottom of the grey background, there is a small copyright notice: "© 2007-2020 Bill.com, LLC | Terms of Use | Privacy Policy | Support".

Then:

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

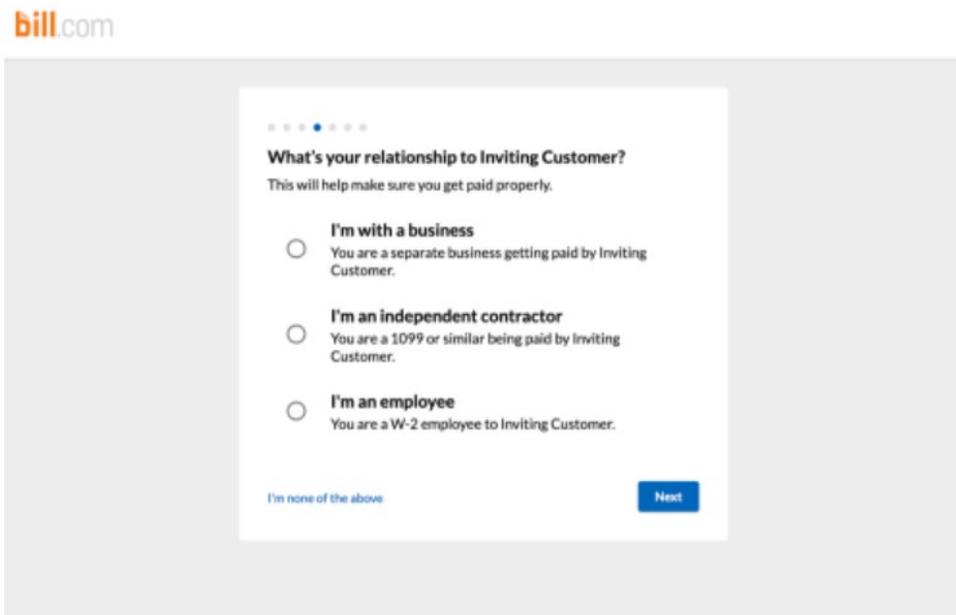
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The screenshot shows a white modal window on a grey background. At the top left of the modal is the bill.com logo. Below it is a progress indicator with six dots, the second of which is filled. The heading is "Confirm your code". Below the heading is the text "Enter the code we sent to your phone". Underneath is a text input field labeled "Confirmation code". At the bottom left of the modal is a blue link labeled "Back". At the bottom right of the modal is a blue button labeled "Submit". At the very bottom of the grey background, there is a small copyright notice: "© 2007-2020 Bill.com, LLC | Terms of Use | Privacy Policy | Support".

Then:

5. They'll then select their account type



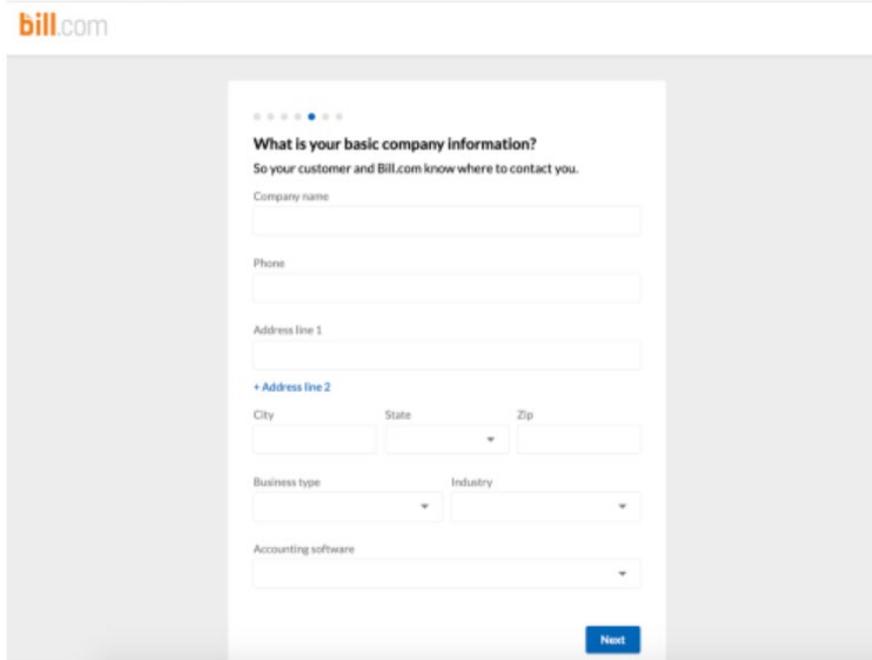
The screenshot shows the Bill.com logo at the top left. Below it is a white form with a progress indicator at the top (five dots, the second is filled). The form title is "What's your relationship to Inviting Customer?" followed by the instruction "This will help make sure you get paid properly." There are three radio button options: "I'm with a business" (with subtext "You are a separate business getting paid by Inviting Customer."), "I'm an independent contractor" (with subtext "You are a 1099 or similar being paid by Inviting Customer."), and "I'm an employee" (with subtext "You are a W-2 employee to Inviting Customer."). At the bottom left is a link "I'm none of the above" and at the bottom right is a blue "Next" button.

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**



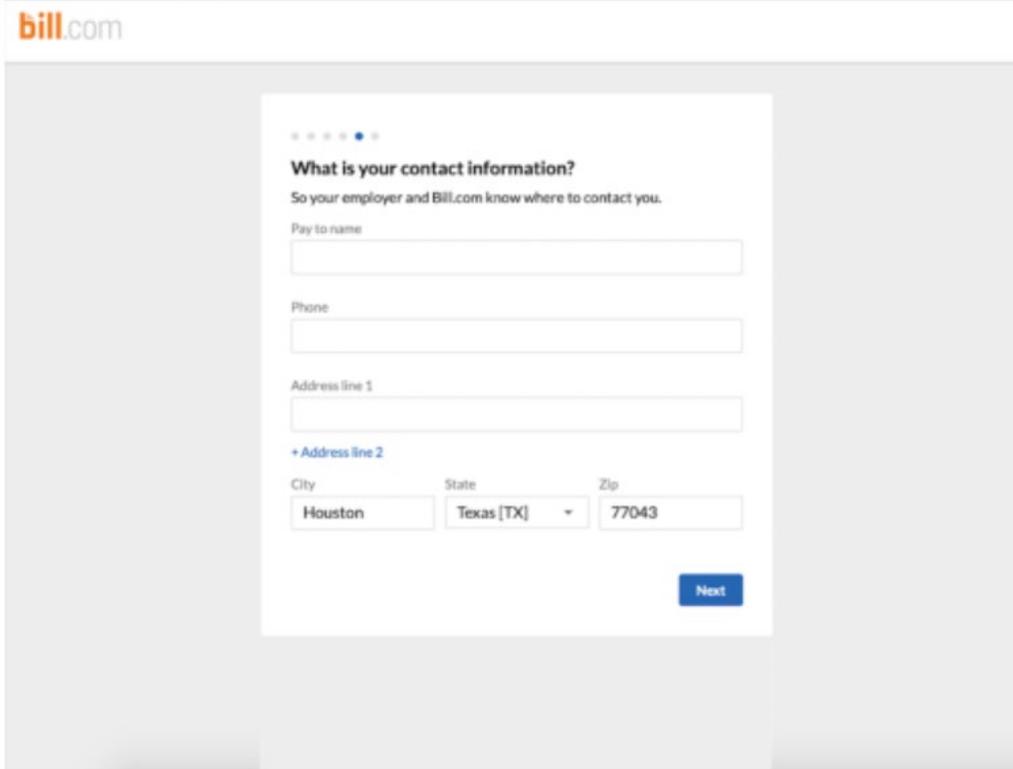
The screenshot shows the Bill.com logo at the top left. Below it is a white form with a progress indicator at the top (five dots, the second is filled). The form title is "What is your basic company information?" followed by the instruction "So your customer and Bill.com know where to contact you." The form contains several input fields: "Company name", "Phone", "Address line 1", "+ Address line 2", "City", "State" (a dropdown menu), "Zip", "Business type" (a dropdown menu), "Industry" (a dropdown menu), and "Accounting software" (a dropdown menu). At the bottom right is a blue "Next" button.

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**



The screenshot shows the bill.com logo at the top left. Below it is a white form titled "What is your contact information?" with a sub-header "So your employer and Bill.com know where to contact you." The form contains several input fields: "Pay to name", "Phone", "Address line 1", and "+ Address line 2". Below these are three fields for "City", "State", and "Zip". The "City" field contains "Houston", the "State" dropdown is set to "Texas [TX]", and the "Zip" field contains "77043". A blue "Next" button is located at the bottom right of the form.

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

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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

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

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ENCIPHERED

Add a bank

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

Routing number

Account number

Account holder name

Account type

Business Checking

Need help?

Save and finish

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"