

bill.com[™]

Bill.com Wealth Management and Family Office Solution Support & Onboarding



Bill.com is a Leader in Financial Process Automation

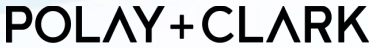
OVER 80%
OF THE TOP-100 U.S.
ACCOUNTING FIRMS

LEADING
U.S. FINANCIAL
INSTITUTIONS

>\$100B
PROCESSED
ANNUALLY

MILLIONS
PAYING &
GETTING PAID

Partners



Standard vs Premium Support

SUPPORT SERVICES	Standard	Premium
Enablement Resources 24/7 access to extensive online library for reference and download, developed by subject matter experts for self-paced learning.	✓	✓
Chat Support Online communication with U.S.-based Success Advocates to answer product-related questions.	✓	✓ *
Email Support Email communication with U.S.-based Success Advocates at a pace that fits your needs.	✓	✓ *
Phone Support Live phone support with U.S.-based Success Advocates, including a pre-call account review and issue diagnosis to accelerate resolution.		✓
Account and Process Review Custom review of your organization's bill creation, approval, payment, and sync process, plus guidance on other features to optimize AP/AR workflows.		✓
User Onboarding & Training Training for new and current administrators through sessions covering account implementation, core tasks, and new features.		✓

* Priority chat and email support

Onboarding Process

30 Minutes

Consultation

Review Bill.com features and workflow

Discuss your unique business needs

Document accounting software configuration and workflows

1.5 - 2 Hours

Activation

Complete setup of your Bill.com account based on business needs and required workflows

Add bank account

Integrate accounting software sync

1 Hour

Training

Train the trainer

Walk through Bill.com functionality

Understand training deck

Know where to find training videos

30 Minutes

Health Check*

Account Health Assessment

Q & A Session

Schedule Additional Training Sessions - if needed

* If requested

For more information
(schedule a demo or try it risk-free):

<https://www.bill.com/wealth-management>