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

bill.com

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

CPA.com | intuit quickbooks | xero | sage Intacct | ORACLE NETSUITE

armanino | EISNERAMPER | POLAY+CLARK | FRIEDMAN+HUEY

Standard vs Premium Support

bill.com

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	1.5 - 2 Hours	1 Hour	30 Minutes
Consultation	**Activation**	**Training**	**Health Check***
Review Bill.com features and workflow	Complete setup of your Bill.com account based on business needs and required workflows	Train the trainer	Account Health Assessment
Discuss your unique business needs	Add bank account	Walk through Bill.com functionality	Q & A Session
Document accounting software configuration and workflows	Integrate accounting software sync	Understand training deck	Schedule Additional Training Sessions - if needed
		Know where to find training videos	* If requested

For more information
(schedule a demo or try it risk-free):
https://www.bill.com/wealth-management