Invoices | Bills | Sync Overview

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Summary

Invoices | Bills | Sync
Create and manage invoices and bills. Sync Payables and Receivables data (including vendors, bills, customers, and invoices) with your accounting software system.

Inbox
Upload or email bills, contracts, vendor credits, credit card receipts, or other files and images. Use the files to create bills or vendor credits or associate them with a vendor or customer.

Payables
Manage your vendors, bills, and vendor credits. Pay bills and invite your vendors to get paid electronically.

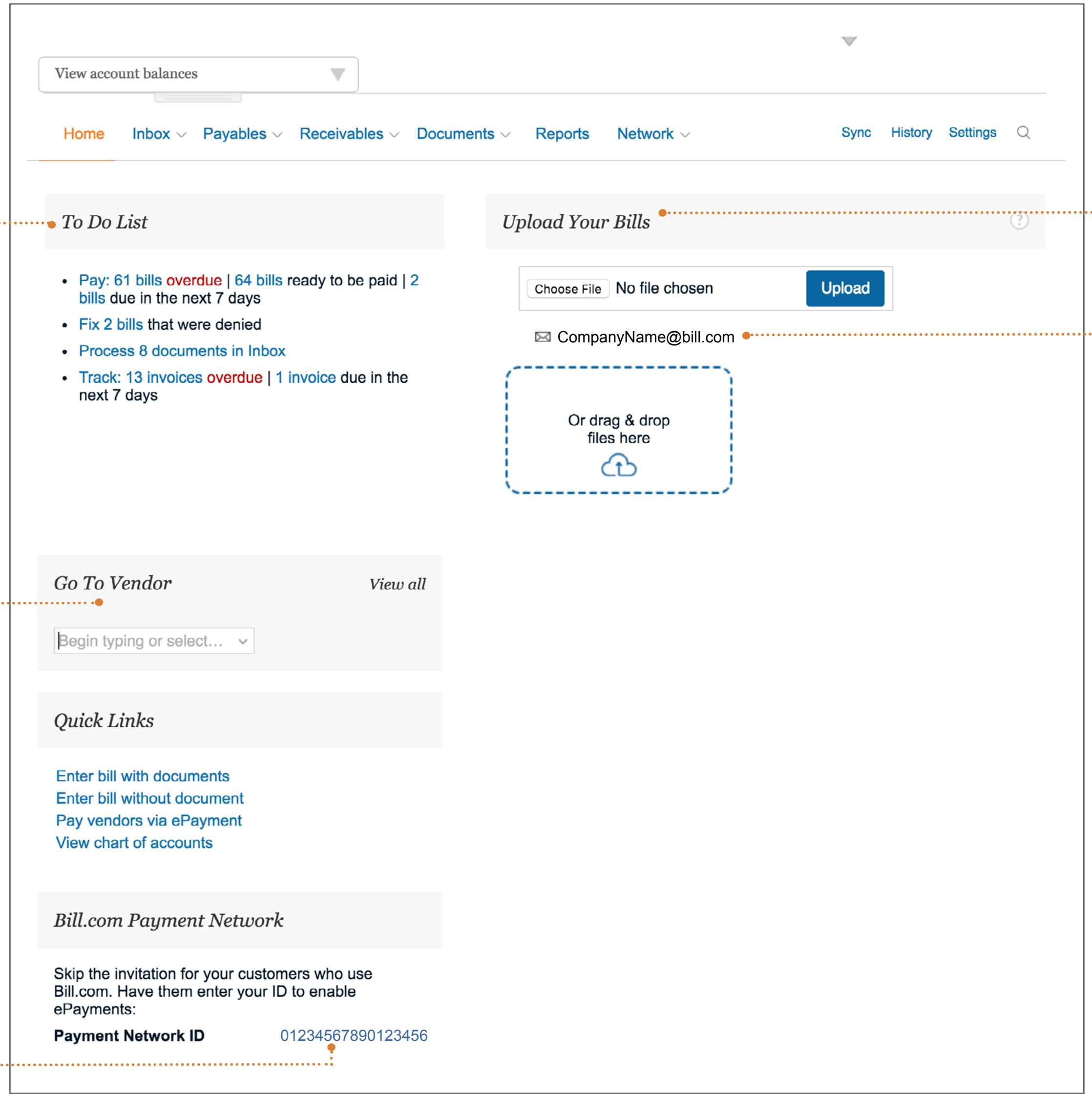
Receivables
Manage your customers, invoices, and customer credits. Send invoices, get paid, and setup automatic reminders for past due invoices.

Documents
View and organize your business documents.

Reports
Generate reports from a list of categories and filter the content that you would like to show.

Settings
Manage your preferences and complete tasks for initial setup of Payables, Receivables, and Accounting Software Sync.

Invoices | Bills | Sync Home



Access bills, invoices and documents that require immediate action.

Upload business documents.

Business documents sent to this email address will appear in your inbox. Establish your inbox email in settings.

Quick access to your vendor list; link to view/ edit existing vendors, add new vendors.

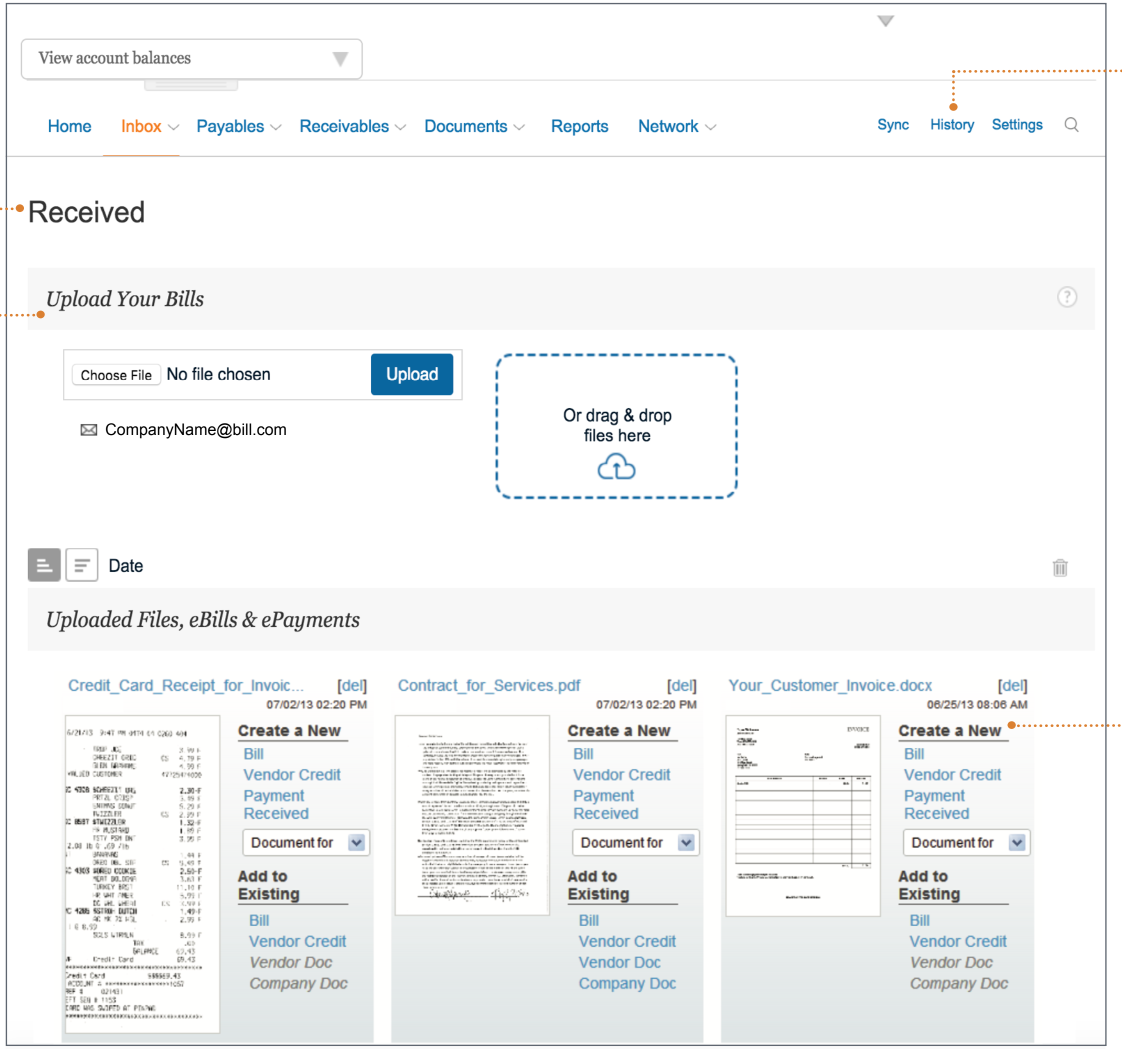
Distribute your Payment Network ID to your customers who use Cash Flow Insight or Bill.com. This unique code allows them to pay you electronically without sharing your bank account.

Inbox

View your uploaded business documents. File these documents according to document type.

Upload and assign files and documents that you have received.

Upload business documents.



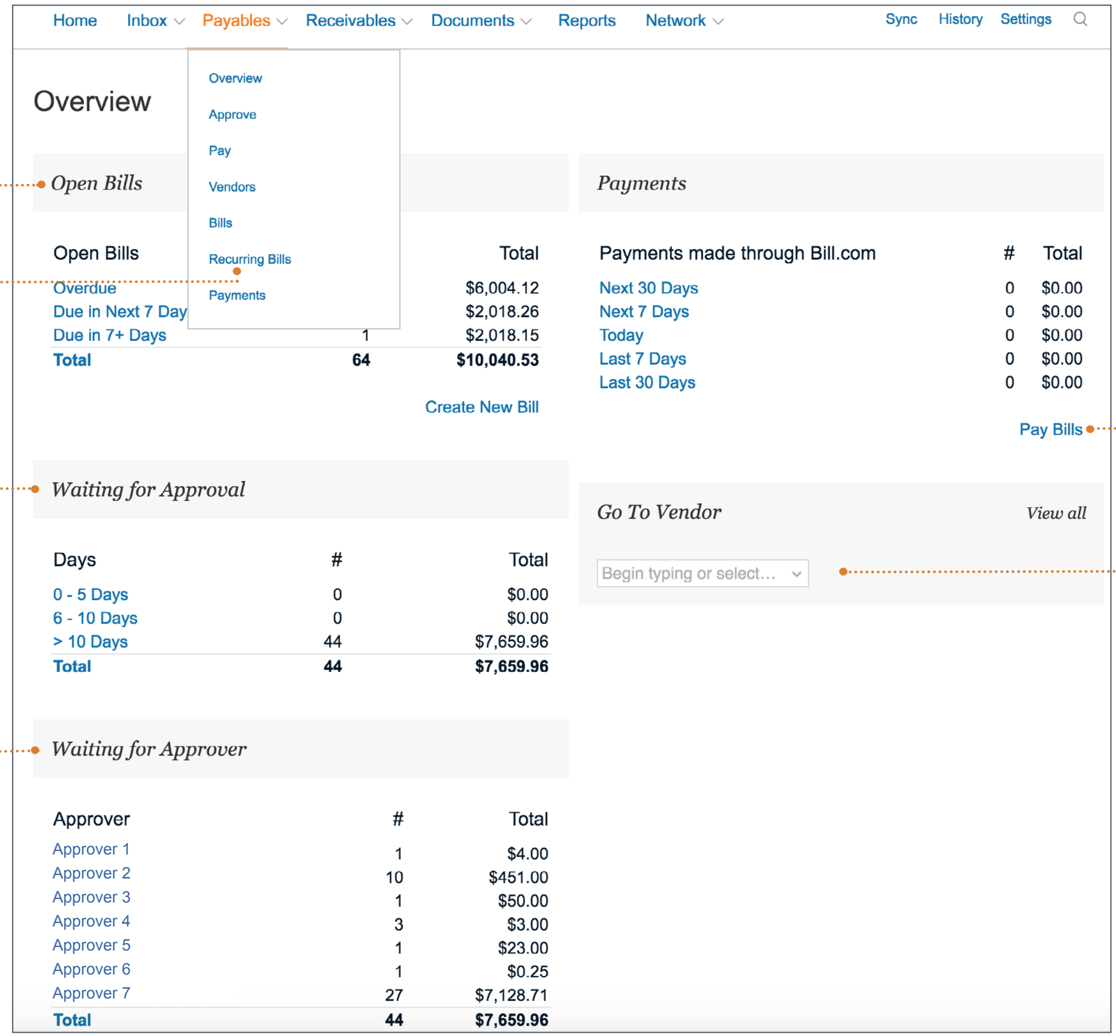
Create a bill record from the associated document. The document will attached to the bill.

Payables

Access bills and documents that require immediate action.

Create and manage bills that are scheduled to repeat.

Check the status of bills that require approval before being paid.



Launch the Pay tab to make a payment for an open bill.

Quick access to your vendor list; link to view/ edit existing vendors, add new vendors.

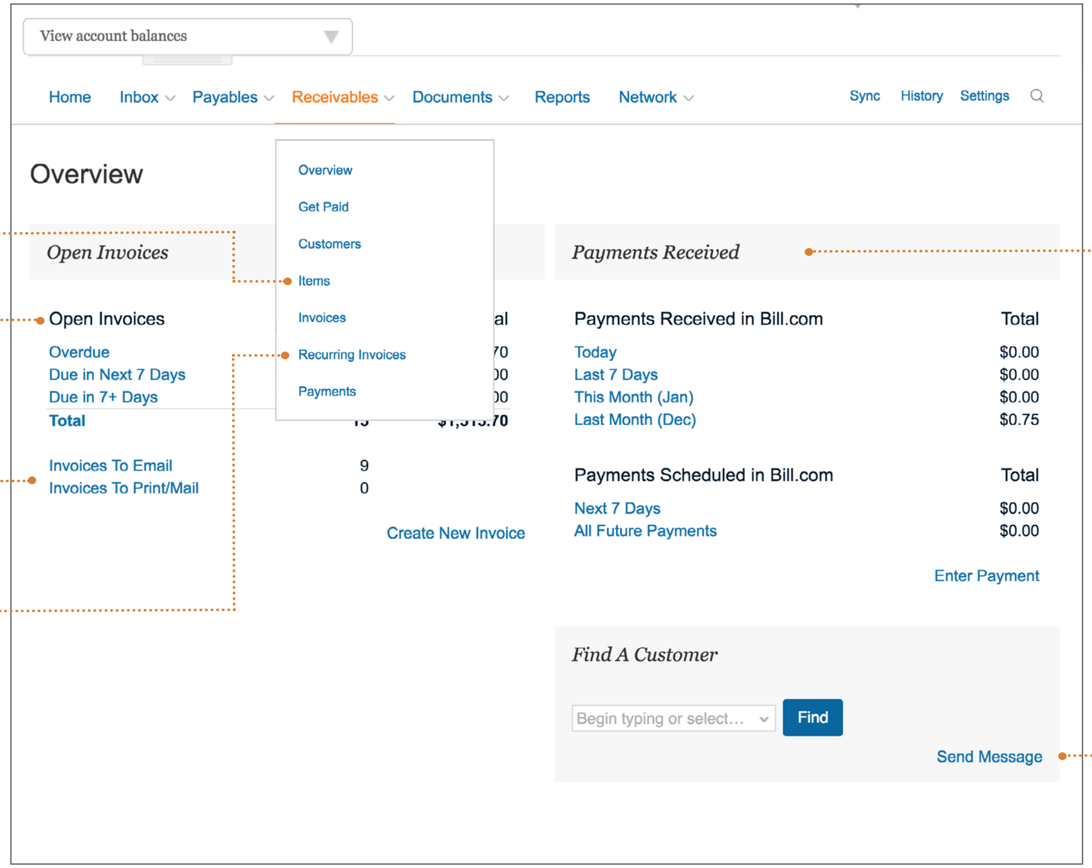
Receivables

Create a catalog of line-items that you can add to your invoices.

View a summary of invoices that have not yet been paid.

View a list of queued invoices which are ready to be sent. Send them all with one click.

Create and manage invoices that are scheduled to repeat.



View payments that have been received and scheduled within the Receivables tool.

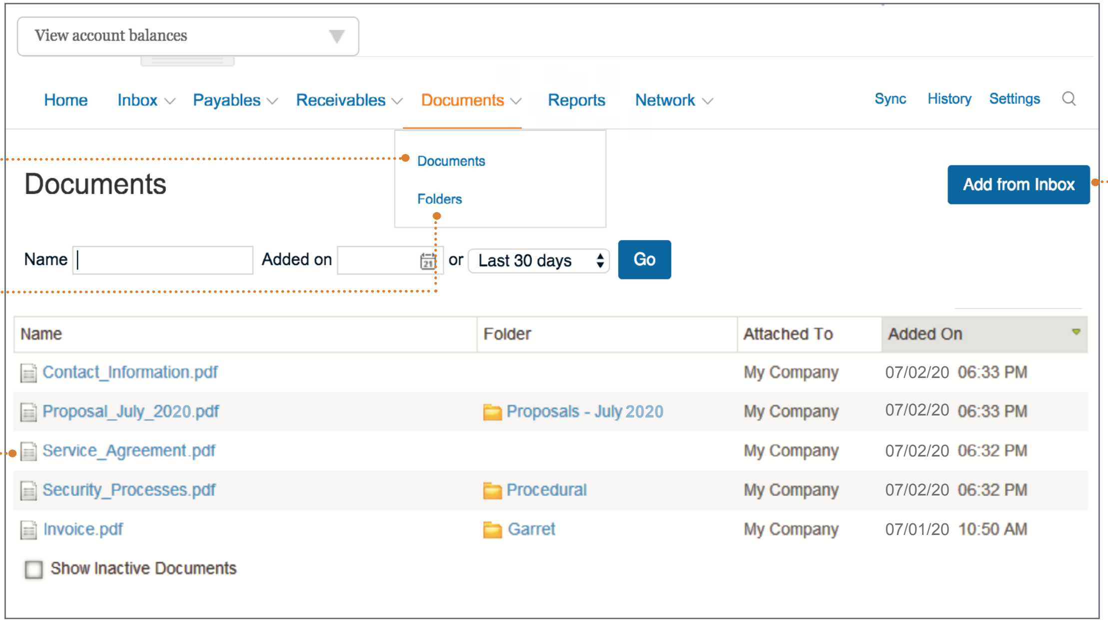
Send an email message to some or all of your customers.

Documents

View documents that you have uploaded from your inbox.

Organize your documents by using folders.

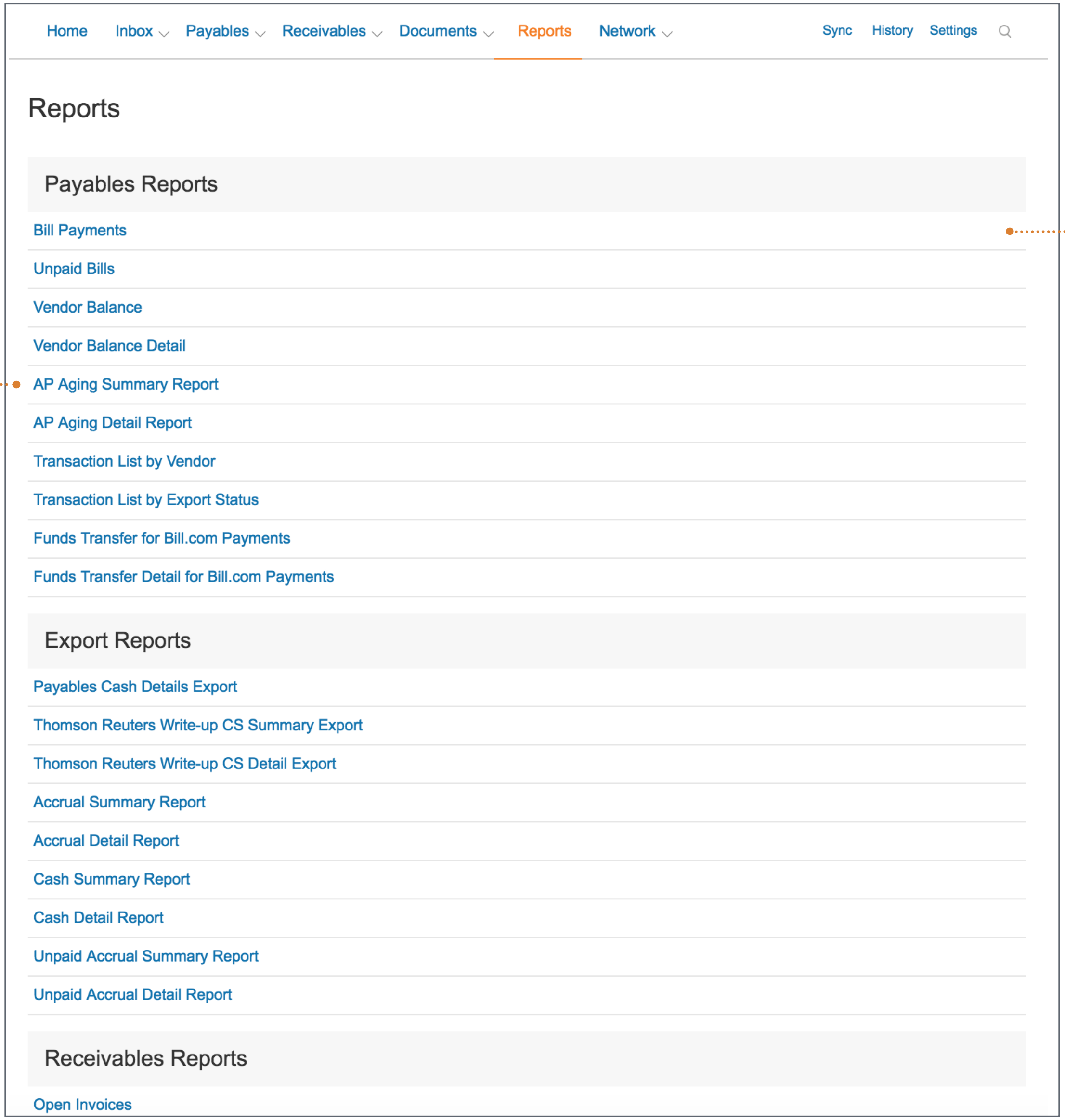
Select a document to view the details.



Go to your inbox to add new documents. Assign documents to a specific vendor, customer, or folder.

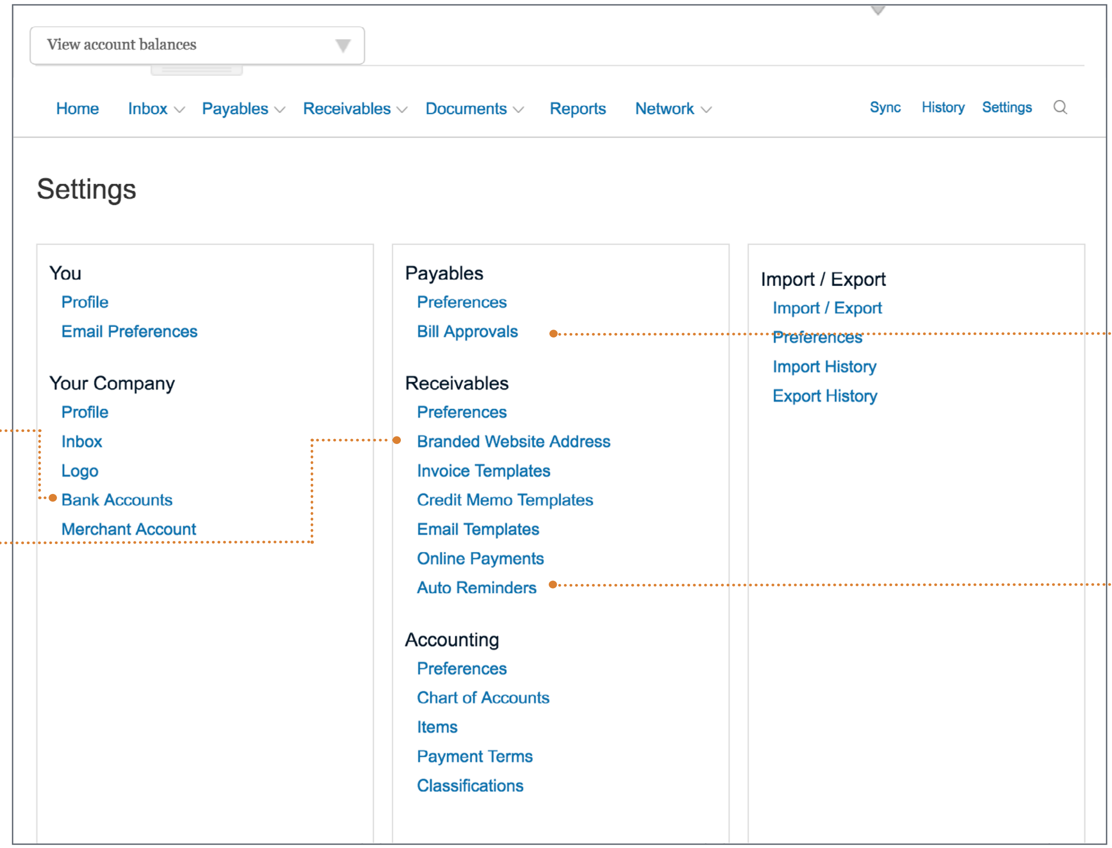
Reports

Select a report, enter date range and other filter options and choose format (html, pdf, csv/excel) to generate the report.



Scroll down for a full list of reporting categories, including Payables Reports, Export Reports, and Receivables Reports

Settings



Designate your default Payables and Receivables accounts.

Customize the payment portal website URL your customers can access to view their outstanding invoices and make payments.

Setup approval workflow and policies for specific approvals required based on amount of bill.

Setup invoice reminders for your customers.