

Overview

BILL.com is an online platform that facilitates electronic payments and financial transactions. This document provides links to important resources, explains their functions, and answers common questions to help grantees navigate the system effectively.

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Key Resources & How to Use Them

1. **General BILL.com Overview & Security Features** — These links provide an introduction to BILL.com and explain how it ensures secure transactions.
 - [BILL.com Overview](#)
 - [Security Features & Capabilities](#)
2. **Setting Up & Managing Your Account** — These links guide users on managing their accounts, including user access and financial details.
 - [Register for a BILL.com Account](#)
 - [How to Add Users](#)
 - [Updating Bank Account Information](#)
 - [Updating Email Address](#)
 - [Changing Address](#)
 - [Removing Personal Information & Adding Company Info](#)
3. **Understanding Payment Network ID (PNI)**
 - If you are an existing BILL.com user, find your PNI by following these steps:
 1. Log into BILL.com
 2. Select **Settings**
 3. Under **Company Profile**, select **Network**
 4. Select **My Network Profile** and note your **Payment Network ID (PNI)**
 - If you do not have a BILL.com account, register [here](#) and send your PNI to the appropriate contact (grants@sunlightgiving.org). Please ensure your account is set up to your organization, not yourself.
4. **Payment Process & Verification**
 - **Payment Methods:** BILL.com provides the option to select payment via Electronic Fund Transfer (EFT) or check.
 1. Check Payments
 1. Require a check mailing address.
 2. Are mailed within 10 business days.
 2. Electronic Fund Transfer (EFT) Payments
 1. Require a Bill.com account. If your organization does not have a Bill.com account, we will send the contact person you specify an invitation to create a free account.
 2. All banking information will be securely stored and managed from your organization's Bill.com account. Sunlight Giving staff will never request or have access to your banking information.
 3. Processing times for EFT payments between banks may vary from 3-10 days.
 - **Multiple Bank Accounts:** A PNI can be linked to multiple bank accounts, even across different legal entities, so it is important to verify the correct default account for receiving funds.
 - **Payment Confirmation:** Grantees/vendors should verify their bank information and ensure that their account reflects the correct point of contact for their banking details

Frequently Asked Questions (FAQs)

1. **What if I don't receive my invite to BILL.com?**
 - Check your spam/junk mail folder.
 - Check with your finance/payment contact to confirm they received it.
2. **What is the best way to provide my PNI?**
 - Submit your PNI to grants@sunlightgiving.org. Please make sure you have your organization name included with your PNI
 - i. **Ex: Sunlight Giving PNI: 0000000000000000**
3. **How to update bank account information**
 - Under company settings, select "Bank & Payments Accounts", Client "Setup New Bank", and follow prompts. Once a bank account is added, it can only be deactivated and cannot be edited.
4. **Can I have multiple bank accounts under one PNI?**
 - Yes, multiple bank accounts can be tied to the same PNI, even for different legal entities. Ensure you verify the correct account is selected before receiving payments.
5. **How to add users to an account**
 - Under company settings, select "Users & Roles" (bottom left), Click "New" button, and follow prompts.

6. How to change their address

- Under company settings, select “Company Profile” then “Company Information” – Under Company Contact Info user will be able to edit the address.

7. How to update their email address

- This cannot be done with a subscription-free basic account. Keep in mind that the user who receives and accepts the invite will be the account's Admin and can add new users. If this needs to be changed, contact Sunlight Giving to resend the invite to a different email address.

8. How to remove personal information and add company information instead

- In company settings, select the category they need to correct, then edit the field as needed. Some information might not be editable once the account is created.

9. How can I update my payment method?

- Log in to your BILL.com account and update your bank details under Payment Settings.

10. What happens if my payment information is incorrect?

- You must update your bank account information immediately to avoid delays. Sunlight Giving is not responsible for incorrect payments due to outdated details.

11. How do I switch from check payments to electronic payments?

- Connect with Sunlight Giving via BILL.com and ensure your account is linked for ACH transfers.

12. How to change their payment method back to check

- The user must remove the bank account. It should default back to check.

For additional support, refer to [BILL.com Help Center](#) or contact the appropriate finance representative.

Basic Receivables BILL Account Setup

You will receive an invitation to create your own subscription-free basic receivables account with BILL or sign in to an existing BILL account. Alternatively, if you know your Payment Network ID, you can use it to connect in BILL.

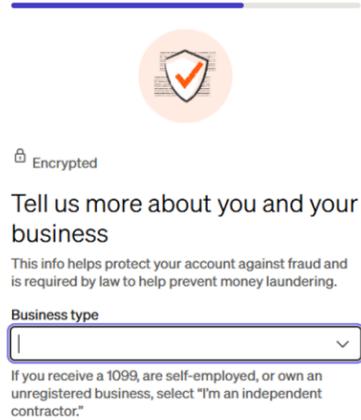
If you are creating a new account, we recommend that the person receiving the invite have authorized access to the organization's bank account.

During setup, answer the prompts below:

1) Skip the Guest Payment



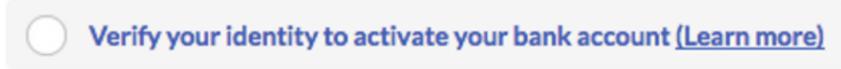
2) Select “Non-Profit” as the Business Type.



3) Follow prompts to enter the organization’s information.

4) Enter banking information in order to receive ePayments (i.e. direct deposits). If this is not provided, Sunlight Giving will provide a check.

5) In some cases, BILL needs additional information to verify your account. If so, on the Overview page, you will see an additional step to complete: Verify your identity to activate your bank account



Resources from BILL Help Center

[Features of a subscription-free Basic Receivables account \(overview\)](#)

[How your invited vendors set up their account](#)

[Add or fix bank account](#)

[Connect from your existing account & locating Payment Network ID \(PNI\)](#)

How to Videos

[How to add user bank](#)

[How to update information](#)