

Quick Start Guide: Basic Plan



This quick start guide is for businesses already enrolled in the BMO Bill Connect Basic Plan.

Let's get started.

1 Add a Vendor or Payee

Manage and pay all your vendors or payees (e.g., your utility company) electronically. Get started by adding a vendor. It only takes a few minutes and will make it easy to pay when your first invoice is due.

How to add your vendors:

1. Go to **Contacts** tab
2. Select **Add Contact**
3. Choose **Add Vendor** from the drop down and follow the prompts.

2 Schedule a Payment^{1,2}

Pay vendors, contractors, or anyone electronically and make printing and signing checks a thing of the past. You don't need a copy of a bill, and you can track payments from the time they're sent to received.

How to make a payment:

Drag and drop an electronic invoice into BMO Bill Connect. Then, follow the instructions to complete the payment.

No bill, no problem. You can still pay a vendor.

1. Select **Schedule Payment** and choose the vendor you want to pay
2. Select **One-time** or **Recurring** and enter the payment information
3. Select **Schedule Payment**

Payment timing:

The timing of your payment depends on how you are making the payment (i.e. check or ACH).

ACH (Standard)

3-5 days

Check

5-7 days

This is an estimate and may vary as it is based on USPS delivery times.

Only Administrators can send an ACH payment. If there is an approver assigned, they are required to approve the payment before the Administrator can release the payment.

3 Set up Recurring Payments^{1,2}

Save time by automating your recurring monthly bills. If you have a vendor that you pay frequently, setting up autopay will guarantee you won't miss a payment. You'll set the amount, frequency and duration for the payments.

How to set up recurring payments:

Select the recurring tab when scheduling a payment. Enter the amount, frequency and duration.

For vendors in the BMO Bill Connect network, you can opt to pay bills automatically as they come into your inbox. Each time a bill comes into your Inbox from that vendor, autopay will detect it, and send the payment for you. To set this up, you'll select the autopay feature on the Vendor Details page (available from the Contacts tab).

4 Add a Customer

Centralize your customer list within BMO Bill Connect. Add a customer by giving us a few simple details about them. You'll be able to track invoices and payments for that customer from their customer record.

How to add your customers:

1. Go to **Contacts** tab
2. Select **Add Contact**
3. Choose **Add Customer** from the drop down and follow the prompts.

5 Create and Send an Invoice

Sending electronic invoices is easy, allows you to get paid faster, and allows for end-to-end visibility.

You can create custom invoices, send them by email, and track the invoice status. Your customers will have the option to pay you electronically and can track payments sent in their own account. If your customer pays you by check or cash, you can mark an invoice as paid for proper tracking.

How to send an invoice:

1. Go to **Send Invoices** tab
2. Select **Create Invoice**
3. Search for or add a customer, and then follow the instructions to complete and send it.

6 Customize Your Account

Customize your inbox email address

The Inbox allows you to receive all your bills and supporting documents in one place which saves time and increases efficiency. You can use your inbox to receive bills directly from your vendors, then quickly initiate payment.

How to customize the inbox email address:

1. Go to the **gear icon** in the top right corner
2. Under **Your Company**, select **Inbox**
3. Enter the desired email and select **Save Email**

You can copy and paste this email for further use with your vendors (you can also copy and paste this email address from the Pay Bills Overview page at any time).

Upload your business logo

Create custom invoices and emails that display your business logo. We'll also display your business logo on the website where your customers pay you.

How to upload a business logo:

1. Go to the **gear icon** in the top right corner
2. Under **Your Company**, select **Logo**
3. Select **Choose File** and then choose the logo file saved on your computer and select **Save**

Branded website address

Create a custom-branded website address that will direct your customers to a customer portal when they select pay invoice electronically on the invoice you send them.

How to set up your branded website address:

1. Go to the **gear icon** in the top right corner
2. Under **Receivables**, choose **Branded Website Address**
3. Enter the desired URL and select **Save**

7 One-time Import of Vendors and Customers from QuickBooks® Online or Xero®

If you use QuickBooks® Online and Xero®, you can complete a one-time import of your vendor and customer contact information from your accounting software into BMO Bill Connect. This will make it faster to pay and invoice them.

How to complete your one-time import from QuickBooks®:

1. Navigate to the **Pay bills** tab and scroll below your payment history
2. You'll see a box titled **Import contacts from QuickBooks**

3. Select **Connect to QuickBooks** and follow the prompts
You can also follow the same syncing prompt from your Contacts page.

How to complete the one-time import from Xero:

1. Navigate to the **Pay bills** tab and scroll below your payment history
2. You'll see a box titled **Import contacts from Xero**
3. Select **Connect to Xero** and follow the prompts
4. You can also follow the same syncing prompt from your Contacts page.

NOTE: The option to complete a one-time import of vendor and customers from QuickBooks® Online and Xero® is only available if QuickBooks or Xero were selected during account set up.

8 Do more with BMO Bill Connect

If you need a more robust dashboard or ongoing sync with your accounting software, our **Advanced Plan** offers additional features that might interest you:

- Collaborate easily, more securely³, and quickly by adding your team
- Add tracking classification to bills
- Assign user-specific roles and permissions and route bills for approval with full control and visibility over the end-to-end process⁴
- Integrate BMO Bill Connect with your accounting software directly (QuickBooks Online, QuickBooks Desktop, or Xero) to avoid double data entry.

For additional details on the advantages of the Advanced Plan, please visit www.bmo.com/billconnect. Upgrade at any time within BMO Bill Connect.

Glossary

Vendors: Suppliers/contractors you pay for goods/services

Customers: Businesses/consumers who pay you for goods/services

Bills: Invoices and documents used to pay a vendor

BMO Bill Connect Network: There are millions of businesses in the Network and connecting with them is a fast, easy and secure³ way to facilitate ACH money movement

For more details, visit www.bmo.com/billconnect



¹ BMO Bill Connect transactions will not count towards business checking deposit account transaction limits. If a BMO Bill Connect payment results in an overdrawn account, overdraft fees will apply. Standard fees apply for all business checking accounts. See your product disclosure for standard business checking product fees.

² Transaction and service fees apply. Please reference the [BMO Bill Connect Pricing Schedule](#) for full details.

³ Visit the [BMO Security Center](#) and your [BMO Bill Connect Terms of Service](#) to learn more.

⁴ Collaborator Users are invited to join the Bill Connect business profile by the Administrator. Collaborators will receive an invitation to Bill Connect and will establish their own user profile, username, and password. Collaborator Users are not authorized to transact on behalf of the business.

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