Product	Use	Helpful because...	Controls ...	Cost & other

Bill.com
 	
Accounting in QBs:
Dr. Exp
   Cr. AP
Input invoice
 	
Dr. AP
   Cr. bill.com clearing
Dr. bill.com clearing
   Cr. Cash (many)
Bill payment
Clearing account provides payment detail by invoice
	Process invoices
	
	Process Receivables
		Syncs with Quickbooks
		Electronic storage - no more AP files, vendor files, no filing
		File w-9s with vendors
		Easy communication tool on bills
		Set up monthly bills
		Receivables easily processed.
		Set up in Quickbooks, email payee easily, tracks timing
		Make banks recs easier
			Can see all bills outstanding, know what's overdue
			Everyone sees who is approving, notes, where charged
			When payments made, email to those you set up (AP makes payment, Treasury gets email)
			Can easily separate the duties of paying bills and ability to input bills to system.
				$49 per user per month for feature user
				$10 approver user
				$.49 epayments
				$1.49 checks
				
				We were drowning in paper and 4 locations made approvals and getting bills paid timely a challenge. Email traffic was unwieldy

DocuSign	Signing anything Offer letters Onboarding docs	Set up templates (offer letter w benefits summary) Reminder to signer Track progress	Can cc: others that need to know, ease of doing so. Filing easy, people like it	Approximately $1 per document with the nonprofit discount Customer service really helpful
Tallie	Employee Reimbursements AMEX card	App to upload pictures of receipts Syncs to QBs	Approvers set up centrally Documentation easy to save	Pay per report rather than # of users. $9 per <u>active</u> user per month
Salesforce	Program tracking Personnel files	Easily customizable Email template helpful for onboarding	Access set up Settings	Free for up to 10 users