Bill.com Setup

Tallie can be integrated with Bill.com, where all your reimbursable and non-reimbursable expense reports can automatically create bills to digitally reimburse your team and pay your credit card vendors. To learn more about Bill.com, visit their website.

If you already have a Bill.com account and are integrated with other accounting software such as QuickBooks, QuickBooks Online, Intacct, etc., be sure to synchronize your data first. Once you have primed your Bill.com account with the most updated information, we can link it with Tallie.

Attention QBO users: ensure you sync Tallie with QBO **before** connecting to Bill.com by following this article. Failing to do so may result in sync and export issues that will require us to issue you a new account.

Using this guide, you'll learn:

- How to integrate with Bill.com
- How the sync works

Integrating Tallie with Bill.com

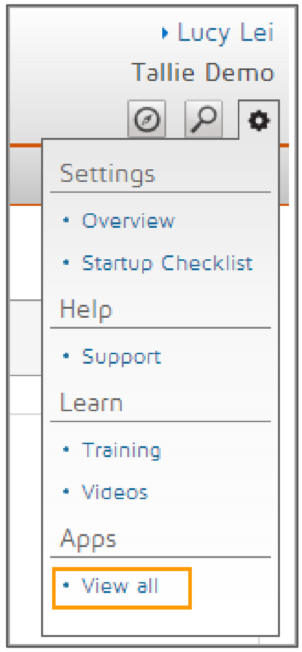
Before you establish the connection between your Tallie and Bill.com, you must:

- Use the same email address in Bill.com and Tallie as an Admin
- Have already logged in to Tallie using that email address

You are now ready to connect Tallie and Bill.com by following the instructions below:

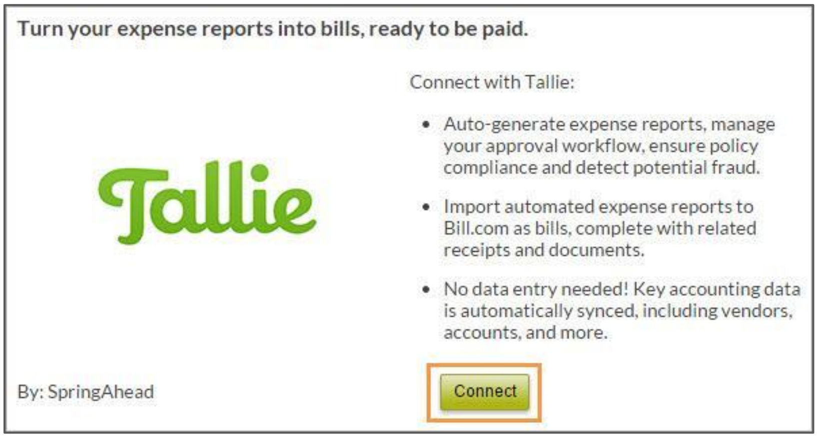
- Log into Bill.com

- Click on the **gear** icon in the top right to open up the settings menu, then under Apps, click **View All**

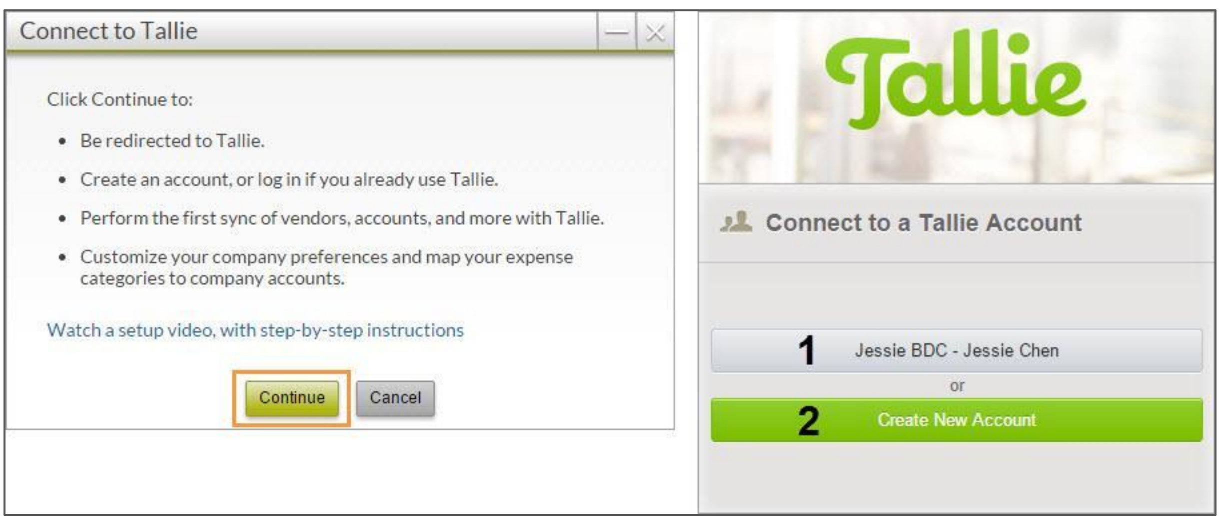


- Click on the **Tallie app**

- Click **Connect**



- Click **Continue**. You'll have the options to either link this Bill.com account to an existing Tallie account (based on your email address) or create a new one.



1. If you wish to link to an existing account, select the first option:
    a. Enter your Tallie log in credentials for Tallie.
    b. Review billing information.
    c. And then, the accounts will be connected.

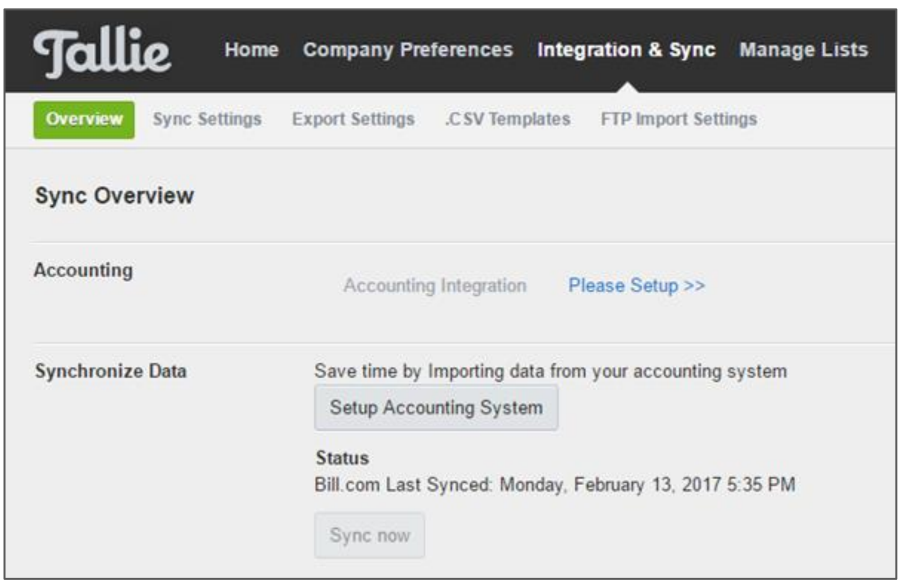
2. If you would like to create a new Tallie, select **Create New Account**:

a. Verify the pre-populated information.
b. Review Tallie's billing information.
c. Both accounts will be connected thereafter.

And that's it! You're now configured to export expense reports to Bill.com!

How the Sync Works

- The sync between Bill.com and Tallie occurs **bi-directionally:**
  - New information added in Tallie will **immediately** be reflected in your Bill.com account.
  - New information added to Bill.com will come into Tallie **every hour**.
  - To perform a sync instantly, go to Tallie's **Integration & Sync** page, and click **Sync Now.**



- Lists that are synced between Tallie and Bill.com include the Chart of Accounts, Customers and Projects, Classes, Items, and Vendors.