

THE CONRAD PREBYS FOUNDATION

Guide: Creating an account with Bill.com

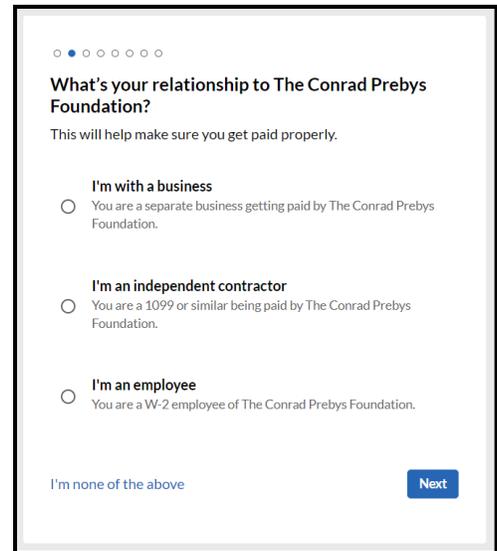
Note: This account is FREE to receive payments from the Foundation and other organizations.

1. A Foundation member will invite you to Bill.com, the platform used for grant transfers.
 - a. The invitation will be sent to the email address that was used for the application.
2. You will receive an email from Bill.com with the following subject line: The Conrad Prebys Foundation wants to pay you
 - a. Click on the icon in the email that says, "Accept Invitation".
3. Your web browser will open a link to Bill.com's account creation page.

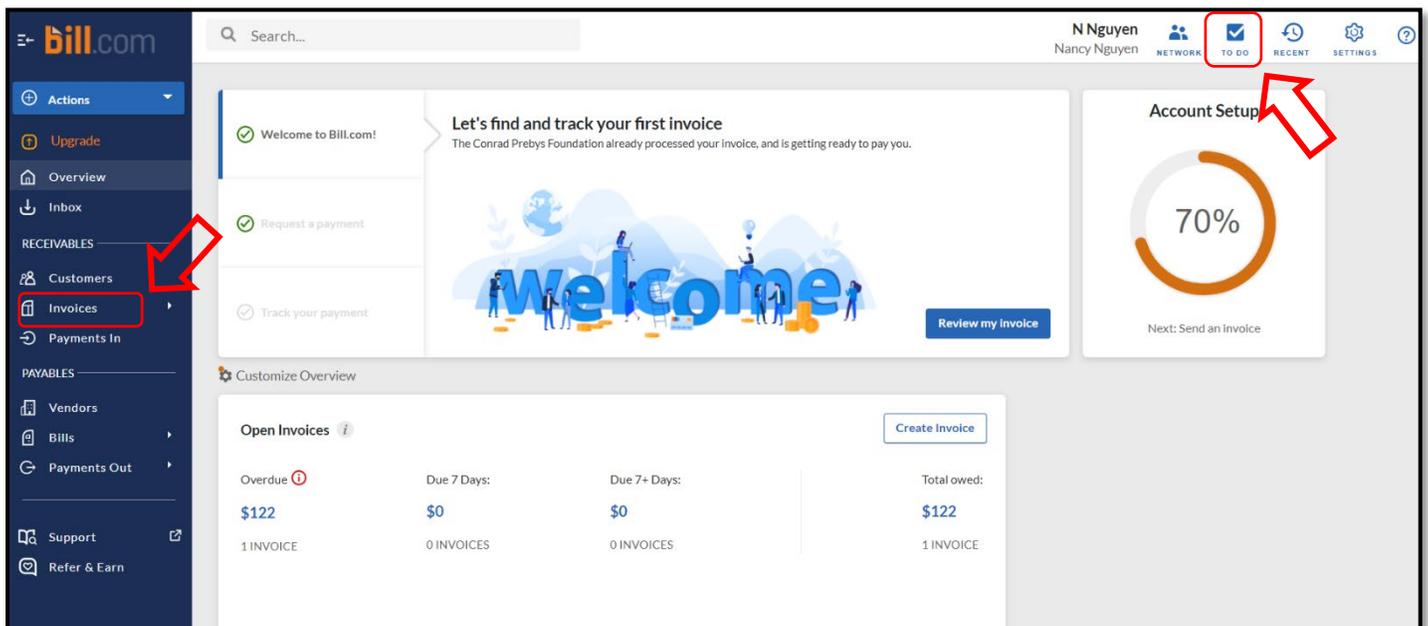
4. You will be requested to complete the indicated fields.
 - a. Note the email address that the invite was sent to will auto-populate.
5. Once all the fields are filled in, select "Create Account" to proceed.
 - a. You will receive another email with the option to track your payment on Bill.com
6. On the next screen, for additional account security, you will be requested to provide a phone number to receive a unique code.
 - a. This phone number will be linked to your account.
 - b. You can choose to receive this code by text or phone call.
 - c. Press "Send Code" to proceed.
7. You will be prompted to enter the unique code.

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8. Depending on the method you chose, you will either receive a text or phone call with the unique code.
9. Insert the code in the field labelled “Confirmation code” and press “Submit”.
10. On the next screen, you will be requested to select what type of relationship you have with the Foundation.
 - a. Select “I’m with a business”.
11. The next step will request you to enter information based on your previous selection regarding your relationship to the Foundation.
 - a. Enter your organization’s federal tax ID number (TIN).
12. Finally, you will be required to enter the bank information where you would like the payment sent.
 - a. You will receive an email confirming your bank account has been added.
13. Once completed, your browser will direct you to



A screenshot of a web form titled "What's your relationship to The Conrad Prebys Foundation?". The form has a progress indicator at the top with six dots, the first of which is filled. Below the title is a sub-header "This will help make sure you get paid properly." There are three radio button options: "I'm with a business" (selected), "I'm an independent contractor", and "I'm an employee". At the bottom, there is a link "I'm none of the above" and a blue "Next" button.

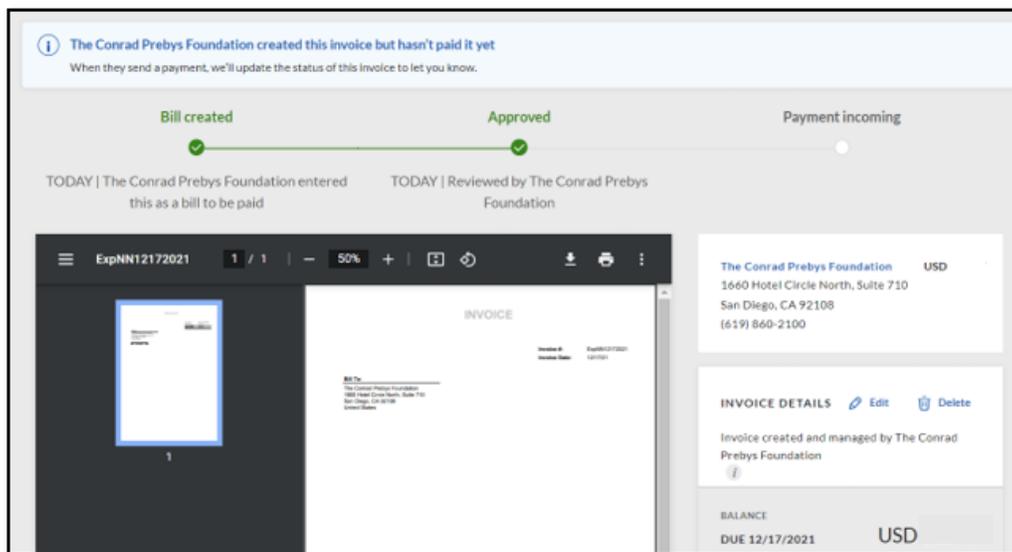
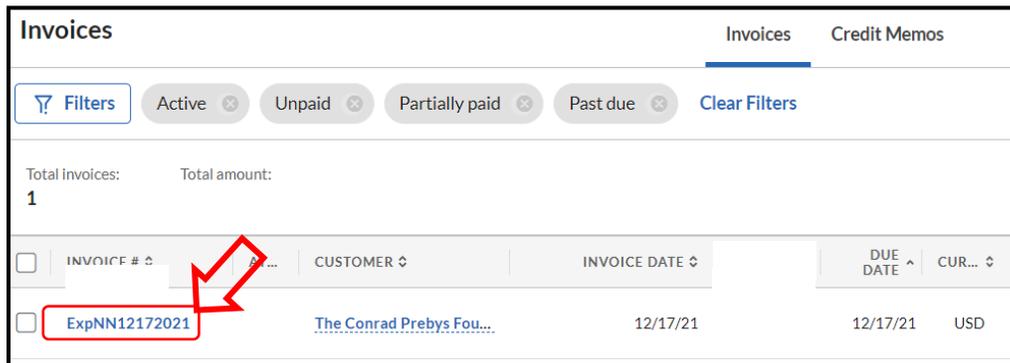


Bill.com’s dashboard.

14. From here, you have an array of menu options on the left-hand side of the dashboard as well as on the top-right-hand side. You can select the **To Do** icon from the top-right menu which will allow you to see any items that are pending or require your attention.
15. You will receive an email when your payment has been made by the Foundation.

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16. In Bill.com, click **invoices** from the left-side menu to access your open invoices and payments that are owed to you.
17. Click the invoice number to expand the invoice details as well as see the status of your payment.



NOTES

- Please do NOT send an invoice to the Foundation. Once we have your contract and have processed internal controls, we will issue payment.
- Within a few days of setting up the account, Bill.com will issue payment testing. (They will deposit and then withdrawal a few cents.) This is not facilitated by the Foundation and is separate from the "Penny Test" the Foundation will issue after the account had been set up and connected to the Foundation.
- Any transaction from the Foundation to the Organization, through Bill.com with have the Foundation's name listed in the transaction description in your bank account.
 - Ex: "The Conrad Prebys DES:Receivable ID:02..."