

Do you invoice your  
clients and use  
QuickBooks?



# Getting Paid Shouldn't Be a Pain

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- Paper Invoices / Shipping
- Check / Cash Deposits
- Dual Entry Reconciliation
- No Payment Method on File
- No Auto / Recurring Payments



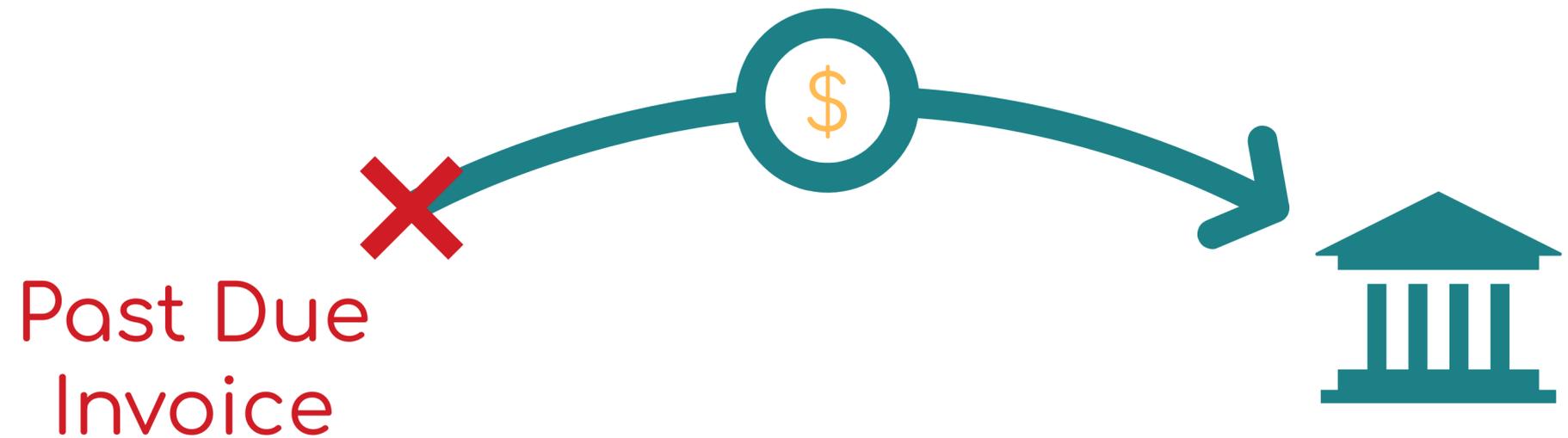
# Get Paid Faster

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Collect Outstanding Invoices



Reduce Bad Debt



\* <https://www.pymnts.com/news/b2b-payments/2021/62-pct-firms-realize-dso-improvement-from-ar-automation/>

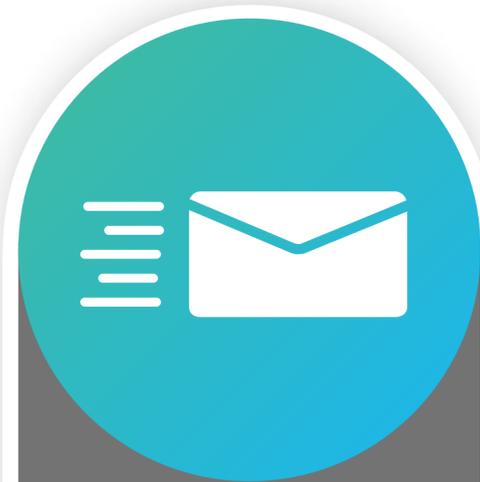
## Create

Create an invoice in your accounting software just like you always have, and let The Genie do the rest.



### Step 1

## Step 2

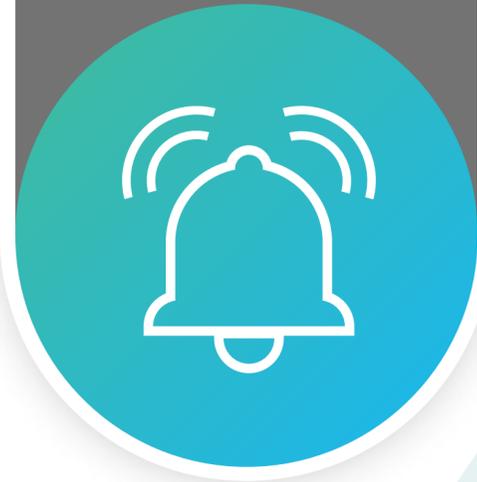


## Send

Invoices go out when you choose and on your letterhead automatically.

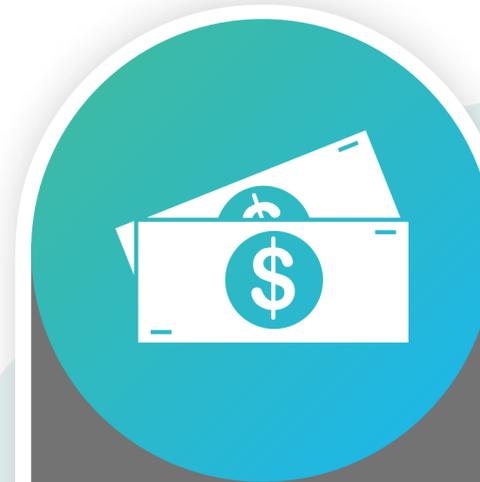
## Collect

Both subscribers & their customers can log-in, make payments, view history, set-up auto pay, from anywhere 24/7.



### Step 3

## Step 4



## Reconcile

Integration saves you time by eliminating duplicate work and making reconciliation easy.



# How Does it Work



Sync



Customize



Create



Email



Accept



Reconcile



# Sync QuickBooks With Biller Genie



Sync



Customize



Create



Email



Accept



Reconcile

- Home
- Customers
- Invoices
- Items
- Reports >
- Control Panel >
- Add-ons >
- Add-ons Marketplace
- Help Center
- Feature Tour

## QuickBooks Online i

### Setup

#### Getting connected to QuickBooks

Welcome!  
You're either connecting to QuickBooks for the first time or your current connection has expired. Click on the "Connect to QuickBooks" button in the next box to get started.

#### Connect

Click to connect!

[Connect to QuickBooks](#)

#### Support

Have a question?  
[Learn about QuickBooks integration](#)  
or  
[contact support.](#)

### Latest Sync Results

|        |                     |
|--------|---------------------|
| Date   | 4/3/2023 7:16:37 AM |
| Status | Disconnected        |



 [Get Started](#) 0



# Customize Invoice Branding



# INVOICE



Amount Due (USD):  
**\$55.00**

**BILL TO:**

JS Contracting  
John Smith  
1234 Zazu Way  
Orlando, FL 32839

**SHIP TO:**

JS Contracting  
John Smith  
1234 Zazu Way  
Orlando, FL 32839



Invoice No: 1001  
Status: Open  
Invoice Date: 03/23/2023  
Due Date: 04/22/2023  
Total: \$55.00

| Product/Service | Quantity | Unit Price | Total   |
|-----------------|----------|------------|---------|
|                 | 1.00     | \$55.00    | \$55.00 |

**Notes**

Subtotal: \$55.00

Tax: \$0.00

Invoice Amount: \$55.00

Previous Payment(s): \$0.00

**Amount Due (USD) \$55.00**



# Build an Invoice in QuickBooks

(with Line Items)



Sync



Customize



Create



Email



Accept



Reconcile

# INVOICE

**BG Test Demo**  
1234567 Bg Test Way  
Miami FL 33137

bgdemo2023@gmail.com

[Edit company](#)

Add logo

Max size: 1 MB

John Smith

Text

### Bill to

John Smith  
JS Contracting  
1234 Zazu Way  
Orlando, FL 32839

Invoice no. 1002

Terms Net 30

Invoice date 04/03/2023

Due date 05/03/2023

[Edit customer](#)

Tags (hidden):

[Manage tags](#)

Start typing to add a tag

Product or service

Amount

## Invoice 1002

[Edit default settings](#)

Customization

Payment options

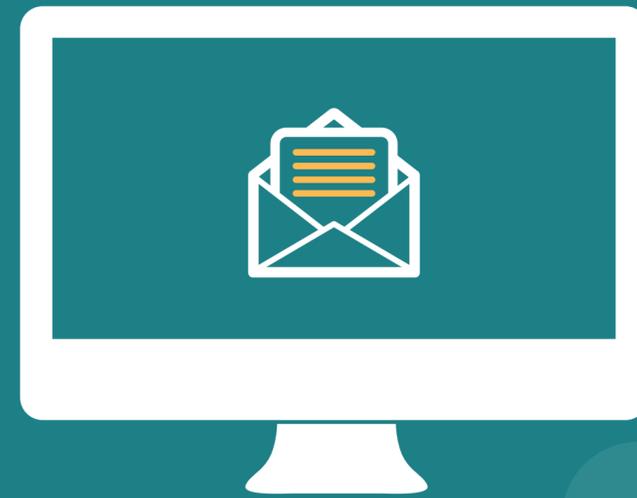
Design

Automation



Save

Review and send



# Invoices are Emailed (Automatically)



Sync



Customize



Create



Email



Accept



Reconcile



# Saved invoices are automatically synced with **Biller Genie**.

Customer

Name and contact

Title: [ ] First name: John Middle name: [ ] Last name: Smith Suffix: [ ]

Company name: JS Contracting Customer display name\*: John Smith

Email: jstest@billergenie.com Phone number: (111) 222-3333

Mobile number: (444) 555-6666 Fax: [ ]

Other: [ ] Website: [ ]

Name to print on checks: John Smith

Is a sub-customer

Save



billergenie

- Home
- Customers
- Invoices
- Sales Receipts
- Items
- Reports
- Control Panel
- Add-ons
- Add-ons Marketplace
- Help Center
- Feature Tour

Sync

## Customers > Invoices

| Current                         | 1-30 Days Late                  | 31-60 Days Late                 | 61-90 Days Late                 | 90+ Days Late                   | Total Outstanding |
|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|-------------------|
| \$55.00 1 Total                 | \$0.00 0 Total                  | \$0.00 0 Total                  | \$0.00 0 Total                  | \$0.00 0 Total                  | \$55.00           |
| <a href="#">Click to Filter</a> | Avg. Days Late 0  |

Invoices Open Export to CSV

Search Invoices

Search by invoice number, first name, last name, business name, display name, amount

| Invoice Number | Display Name | Invoice Date | Due Date  | Total   | Payments | Open Balance | Status  |
|----------------|--------------|--------------|-----------|---------|----------|--------------|---------|
| 1001           | John Smith   | 3/23/2023    | 4/22/2023 | \$55.00 | (\$0.00) | \$55.00      | Current |

« < 1 > » 10 1 records total

Get Started





**JM QBO DEMO Account** <no-reply@billergenie.com> [Unsubscribe](#)  
to me ▾

2:23 PM (2 hours ago)



**LOGO TEXT HERE**  
SLOGAN HERE

## STATEMENT

JM QBO DEMO Account



**INVOICES**

1



**AMOUNT**

\$1.00



**DATE**

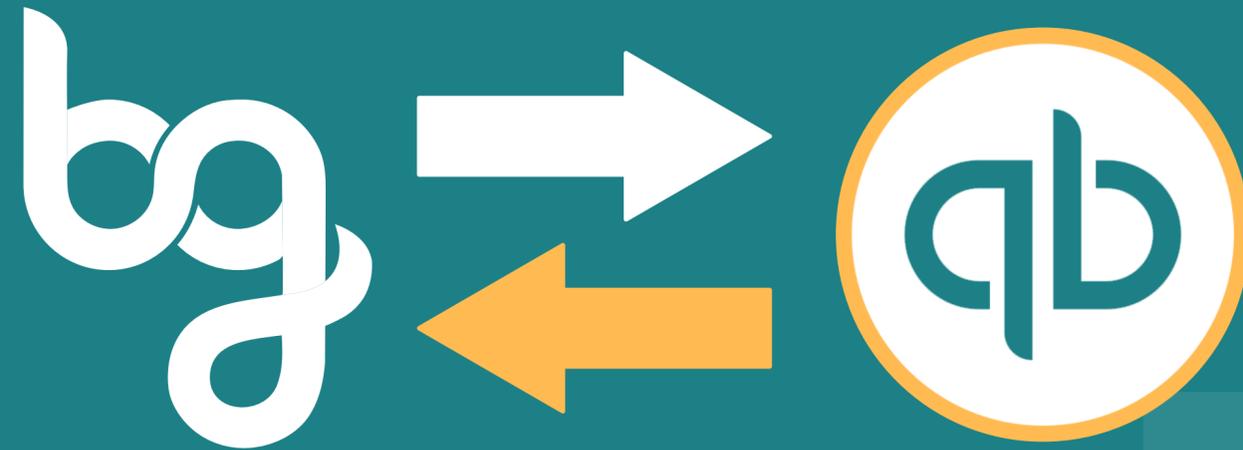
04/03/2023

**VIEW & PAY**



# Accept Any Payment From Any Device





# Invoices are Reconciled in Real Time





## Minimize Administrative Work

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- Streamlined invoicing
- Automated reconciliation
- 100% data integrity





vs.



|  |  | Features:                      |
|---|---|--------------------------------|
| ✓   | ✗   | Enable Autopay                 |
| ✓   | ✗   | Store Multiple Payment Methods |
| ✓   | ✗   | Custom Invoices                |
| ✓   | ✗   | Level II & III Optimization    |
| ✓   | ✗   | Offset Payment Acceptance Cost |

## Get Started

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1. Sign up for Biller Genie.
2. Sync your account.
3. Sync your Accounting Software.

Automate invoice collection and **Get Paid Faster**