

*Lessons Learned from the Bill.com Accounting Community*

# Virtual Firm Eschews Paper Bill Pay for Elevated Convenience and Security from Bill.com

As Dennis Najjar, co-founder of AccountingDepartment.com, explains it, the idea for his firm began to germinate in the last century – namely, 1999. Najjar owned his own practice and noticed that while many companies adopted QuickBooks and brought their bookkeeping in-house, they often returned to outside assistance for technical and professional guidance to recognize the full value of their solutions. A few years later, he met his partner Bill Gerber and launched AccountingDepartment.com, a firm focused on outsourced bookkeeping and controller services for small and midsize businesses.

“We’ve been virtual since day one,” shares Najjar.

The firm’s business model ensures that it can provide highly qualified professionals to help its clients – no matter where the clients or the employees are located.

Understandably, technology plays a key role in their success.

Explains Najjar: “We’re known for technology. Businesses have a tough time managing accounting, let alone handling accounting technologies. We’re always looking for opportunities to help businesses streamline their back offices. A lot of our clients have paper-centric bookkeeping with no systems in place. One of the first things we help clients with is to put together workflows.”

Traditionally, the firm relied on a spreadsheet to collaborate with clients on bill pay.

“Every week, our clients would get a report from us with all the open or new bills listed. They would make notes as to what to pay and when and return it to us. From there, we’d print PDF checks on paper stock, stamp and mail the bills. It worked, but was a very manual and time-consuming process. We knew it was time to start exploring bill pay solutions,” comments Najjar.

## Finding an Efficient and Proven Bill Pay Technology

“We looked at a couple of bill pay solutions, but at the time we weren’t sure which providers would succeed or even be around for the long term. We were attracted to Bill.com because we knew its founder, René Lacerte, had a lot of credibility in our field,” says Najjar. “We had initially evaluated the very first version of Bill.com years ago, but had decided against using it because it didn’t offer the entire functionality we needed. However, about four years ago we ran into Bill.com at an industry conference and took another look.”



### EMPLOYEES

80+

### INDUSTRY FOCUS

Outsourced bookkeeping and controller services

### CLIENTS

400

### BILL.COM SERVICES

Accounts Payable and Accounts Receivable

### INTEGRATIONS

Intuit Quickbooks Desktop and Online

Visit [Bill.com](#) for more information.

Bill.com was particularly attractive due to the fact that it is cloud-based and offered valuable integrations.

“Our whole firm is based in the cloud, and we’ve operated in it since 2004. Any bill pay solution we adopted had to be cloud-based,” Najjar points out. “Additionally, we often take clients off of big, expensive accounting technologies products that they don’t need and help them use QuickBooks on an advanced level. Bill.com offers a solid integration with both QuickBooks Online and QuickBooks Desktop, and that was important to us from a business perspective.”

Continues Najjar: “Bill.com had so much to offer, we had to use it.”

### How Bill.com Works

Bill.com moves labor-intensive, traditionally paper-based bill pay processes to the cloud. Bills are emailed, scanned, faxed or entered into the system. From there, the bills follow a preset, online workflow for review, approval and payment. Reviewers receive automated notifications and reminders to view the bills and their associated documentation. A few clicks from a computer or mobile device can approve or deny payment. Payment is issued through a Bill.com account, offering another layer of security for clients’ valuable payment information. Each action in Bill.com is captured to create an in-depth audit trail.

### Introducing Bill.com to New Clients

AccountingDepartment.com quickly began to roll out Bill.com to its new clients, eliminating the need for traditional and cumbersome tools such as spreadsheets or printed paper notes.

“We committed to cloud-based bill pay by putting almost every one of our new clients on Bill.com,” says Najjar.

The firm designated Bill.com implementation responsibilities to its startup department, a group of 12 talented professionals within the firm.

“Our startup department handles all onboarding of new clients. They had to master Bill.com because they do the setup and training. They learned it all quickly and trained the rest of the staff as well as clients,” describes Najjar.

The firm also made the strategic decision to commit to Bill.com certifications.

As Najjar explains: “Two years ago, we made the decision to commit to Intuit, and more than 50 of our bookkeepers earned their certifications for QuickBooks Online. We took the same step with Bill.com. It’s mandatory for every employee to become certified in Bill.com within their first three months at AccountingDepartment.com. The certifications ensure that our firm and our clients understand how to achieve the most from Bill.com. We also wrote a manual for internal use on how the firm uses Bill.com, including how to scale and standardize clients.”

The startup department ensures that clients of AccountingDepartment.com are up and running quickly with Bill.com.



#### CHALLENGES

Labor-intensive and time-consuming client bill pay process

Need for a cloud-based solution to support virtual operations

#### GOAL

Elevated fraud risk due to paper-based bill pay processes or bank-based ePayments

#### SOLUTION

Bill.com Accounts Payable

#### BILL.COM RESULTS/BENEFITS

Efficient, automated and paperless bill pay workflows

Scalable and mobile cloud-based bill pay solution

Reduced risk of fraud due to permissions-based roles, detailed audit trails and Bill.com security measures

Visit [Bill.com](https://www.bill.com) for more information.

“AP is one of the first things that need to get started right away. We have Bill.com setup within the first three days of onboarding, including designating internal roles and workflow,” Najjar reveals.

### Results with Bill.com

“I have three things that I especially appreciate about Bill.com,” shares Najjar. “The first is the paperless workflow. Our clients can eliminate the paper around Bill.com and create more efficient, automated workflows. Second, we don’t have access our clients’ bank accounts. Many clients want to use free bill pay through banks. But when you do that, you give an employee complete access to your bank account, and that can lead to fraud. Bill.com prevents that with permissions. Finally, Bill.com gives us the ability to have multiple approvers. As businesses grow, different payables need to be reviewed and approved by various people. In the old days you’d circulate bills and corresponding documents around on paper to get approval. Now, we don’t have to wait for paper. With Bill.com, we can see who the approvers are and where the bottlenecks are happening.”

Najjar also appreciates the workflow provided by Bill.com.

“Bill.com offers a plug and play workflow. That’s how I describe it to new clients. It enforces the segregation of duties,” comments Najjar.

The firm’s clients have responded well to Bill.com.

“Right now, we have roughly 100 clients on Bill.com with a very low drop-off. Clients stay on it,” explains Najjar.

The firm uses Bill.com for its own bill pay as well.

“I love to go to my phone and pay bills. I get a notification, look at the bills and documentation and can approve or deny it from my smartphone,” says Najjar. “We share that vision with our clients. You can be on an iPad or phone and handle your bill pay. You’re not strapped to desks. Businesses are trying to become leaner and meaner, and there’s constant pressure on them to be more efficient. Bill.com does that for them.”

As Najjar sums it up: “We knew when we adopted Bill.com that there would be an improvement to our internal processes. We have saved time and eliminated time-intensive manual steps related to bill pay. Now, our clients only have a few short steps. They get the notification, log in, pick and choose what they want to pay, and Bill.com does the rest.”



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