Bill.com: Review Vendor Bills for Approval

You have one or more bills waiting for approval. Use this checklist to approve or deny the bills.

☐ **Log in to Bill.com**

Enter your user login credentials. If you have access to more than one company's Bill.com account, click on the appropriate company name

☐ **Review list of bills awaiting approval in queue**

Bill.com > Approvals screen > Bill Approvals tab, view list of bills awaiting approval in your queue.

☐ **Review bill details**

Click on the top **Invoice #** to review the bill document received from the vendor and the transaction information (on the right-side panel) being recorded to the general ledger for this bill. Confirm that all the information is accurate and that the purchase/expense is legitimate.

☐ **View & add notes, if relevant**

In the **Notes** section at the top of the right-side panel, read and/or add any relevant notes as needed. New notes will be seen by any subsequent approvers and the payer.
To tag another user in the note, type the @ sign followed directly by the username of the Bill.com user. This will send that user an email to call greater attention to the note.
If permission permits, you may be able to edit the bill to make any necessary changes or to add additional details to the transaction.

☐ **Approve/Deny/Skip Bills**

Approve: To approve the bill click the **Approve** button.
Skip: Click the **arrows on the left or right side of the screen** to move to the next bill in your queue. You may have a question about the bill and want to contact the vendor before you approve it. Or you may post a note for another Bill.com user in your organization to answer before you approve.
Deny: To Deny the bill, click the **More actions** link and then click **Deny** and then one of the 3 Deny options: **Needs review**, **Duplicate bill**, or **Incorrect bill detail**. Enter a note to explain to the bill creator why the bill was not approved. You may want the information contained in the Bill Details side panel (such as coding or amount, etc) to be changed before you approve. The bill creator will be notified the bill needs review and will see your note. *TIP: To tag another user in the note, type the @ sign followed directly by the username of the Bill.com user. This will send that user an email to call greater attention to the note.*

☐ **Move to next bill**

Click the **arrows on the left or right side of the screen** to move to the next bill in your queue. Alternatively, you may click the X in the upper left corner to close the bill and return to your list of bills awaiting approval. From this list, you may check the box and approve one or more bills without review.