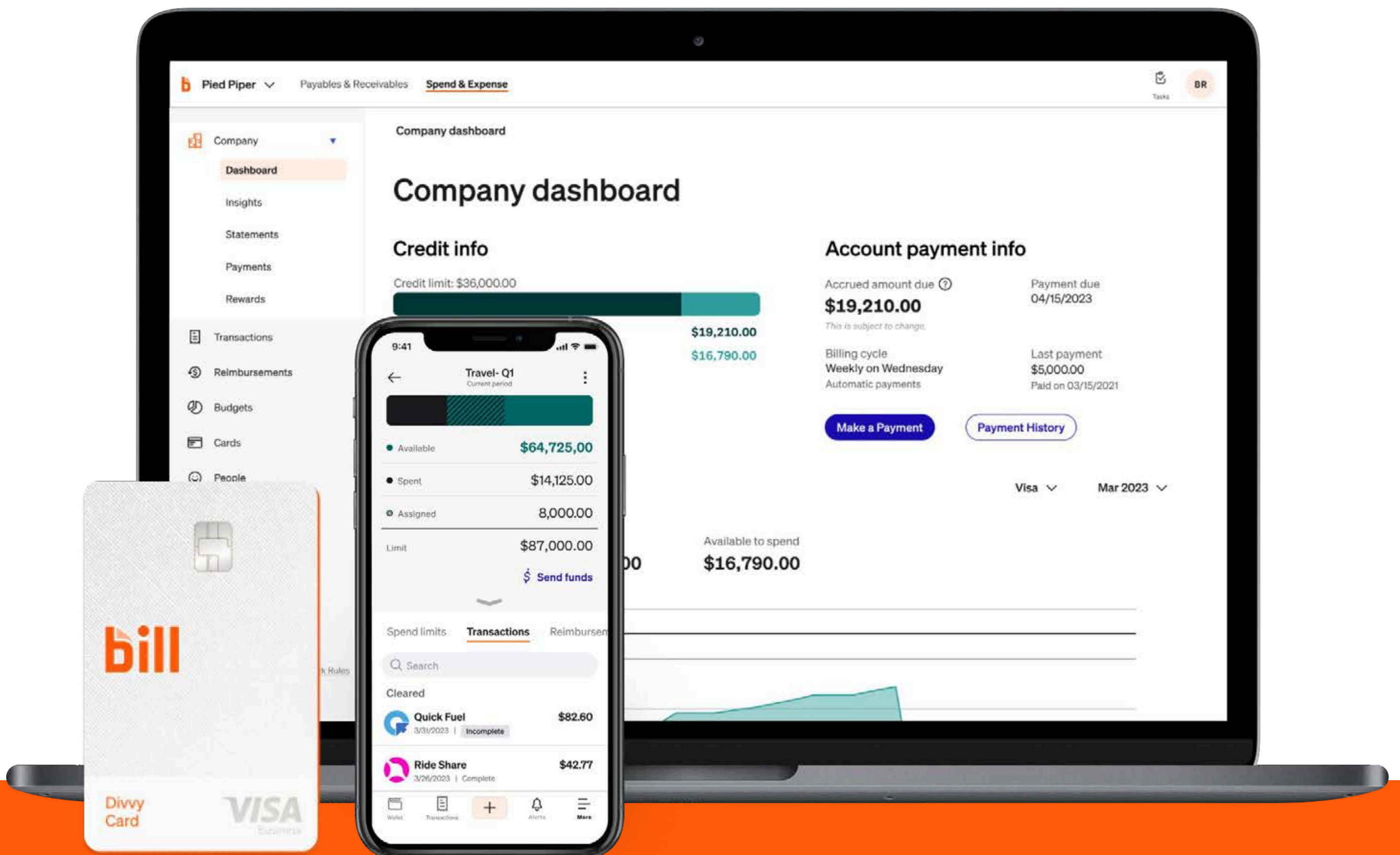


# Best practices when implementing BILL Spend & Expense for clients

A step-by-step guide





# Introduction

Switching a client to BILL Spend & Expense shouldn't be a daunting prospect. This holds true if they have less than 10 employees or more than 100. To help you get started, these are the best practices we've learned from helping accounting firms like yours onboard more than 10,000 clients to BILL Spend & Expense.

*Note: We recommend the accounting firm or outsourced accountant/finance team drive the steps below. After the initial set up and implementation, you can expect your firm to take more of an advisory role.*

## STEP 1

# Collect a roster of employees

The first step is collecting a roster of all employees at your client's organization. This makes it easier to order the needed employee cards and get everyone added to the system quickly.

## Cards

With BILL Spend & Expense, every employee at a company can receive a company card at no cost without the risk of unauthorized spending. Because the company maintains control over who can spend and when, we've found that it's always better to have a card and not need it than to need a card and not have one. Having a roster will make the ordering process easier.

With a roster, we can order all the needed cards and have them shipped before employees know they've been added to BILL Spend & Expense or they've been given access to the software. This way your client can have the cards in hand the minute employees are onboarded and trained.







## Account Set Up

Even if your client would prefer to not give every employee a card, if they intend employees to use virtual cards in BILL Spend & Expense (for example, an employee running digital ad spend who will use virtual cards for these charges), we will need the employee's info to add them to the account.

Best of all, if we have a full roster of employees, we can bulk import users into BILL Spend & Expense to get your client up and running even faster.

### STEP 2

## Identify internal champions

Just like having internal champions for BILL Spend & Expense in your firm, having internal champions at your clients' organization can be the biggest driver to a successful rollout. This will be the team that will help train, answer one off questions, and test during the build out. They will be able to provide quick feedback loops to improve and adjust where needed before a larger rollout.

The team should be comprised of:

- Representatives from different departments, especially those spending most frequently
- At least one person on the finance team to help with admin work

The team will focus on:

- Testing physical cards, virtual cards, desktop software, and mobile app
- Giving feedback about what processes will work best for the whole team
- Executing a month end with you, testing to ensure everything is set up the way you want
- Helping train other team members once you're ready for a wider rollout





### STEP 3

# Set up the accounting integration

As the outsourced accounting/finance team, [setting up the accounting integration](#) and syncs is your secret weapon in both helping your client and your firm with future time savings. While BILL Spend & Expense provides step-by-step guides on how to set up and link [available accounting software integrations](#), we find that most firms make their own adjustments to best fit the workflow for their firm and their clients. This initial set up can take a little time, but it will save you time in the long run. Some firms even [charge clients](#) an initial set up fee to cover this additional time investment when first onboarding the client to BILL Spend & Expense.

Once you have the accounting integration set up for your client, including automatic syncs if you choose, closing the books becomes exponentially faster and easier. You'll no longer be waiting weeks to gather spend and expense data to analyze and reconcile, moving you one step closer to a [continuous close](#).

*Note: We are constantly adding new integrations. You can check out our current integrations [here](#). For any accounting software we don't currently integrate with, you can export data from BILL Spend & Expense for upload at any time.*





## STEP 4

# Make the first transaction

Once you've got cards ordered, employees added, and a testing team in place, it's time to start spending. Once a transaction is in the system you'll see how it will look, what it does to budgets, what notifications are sent, how things are coded (or how they need to be coded), and where it will map in the accounting software. Seeing how things will operate on a smaller scale will make larger roll out more smooth and you'll be able to make adjustments to suit your client and your workflow.



## STEP 5

# Identify or execute a rollout plan and test

Some firms have a predetermined rollout plan when onboarding new clients to BILL Spend & Expense. However, if you have not yet defined that plan don't worry—this is a great time to decide on the plan of action with your client.

## Rip and replace

Rip and replace works just like it sounds: you stop using the current expense platform and process and shift all company spend onto BILL Spend & Expense at once. This approach works well for some kinds of clients. Specifically those with few employees, those who want to use a single budget for all company spend, or those who have no pre-existing expense management software. This strategy still requires working with a small test group initially to make sure things like budget strategy, approvals, and functionality are refined enough to roll out across all company spend.

## Phased rollout

A phased roll out is the method we recommend most often. While a rip and replace can be advantageous to many clients, often it's beneficial to roll out to select groups and with select kinds of spend so that you can make adjustments on a smaller scale before rolling it out across all company spend. It also simplifies training since you're working with smaller groups at a time.

Phases for roll out might include:

- Certain teams or departments
- All subscription and recurring spend first
- Employee travel & expenses first before moving additional company spend
- Specific tools
- A mixture of the above

## Specific tools

As part of a phased roll out, you might consider rolling out specific functionality or tools in BILL Spend & Expense to your client one at a time.

Different tools and functionality might include

- [Virtual cards](#)
- [Physical cards](#)
- [Reimbursements](#)
- [Recurring subscriptions](#)

You may decide to follow the same roll out plan for each of your clients or customize the roll out based on specific client needs. Regardless of which approach you choose, you'll want to test it with your group of internal champions who can give feedback as well as help train other employees as they're onboarded.



## STEP 6

# Layer in additional controls

Once you've decided on a roll out plan and started to execute it and you and your client are more familiar with BILL Spend & Expense, you'll be able to start layering in additional features and controls.

These controls can include

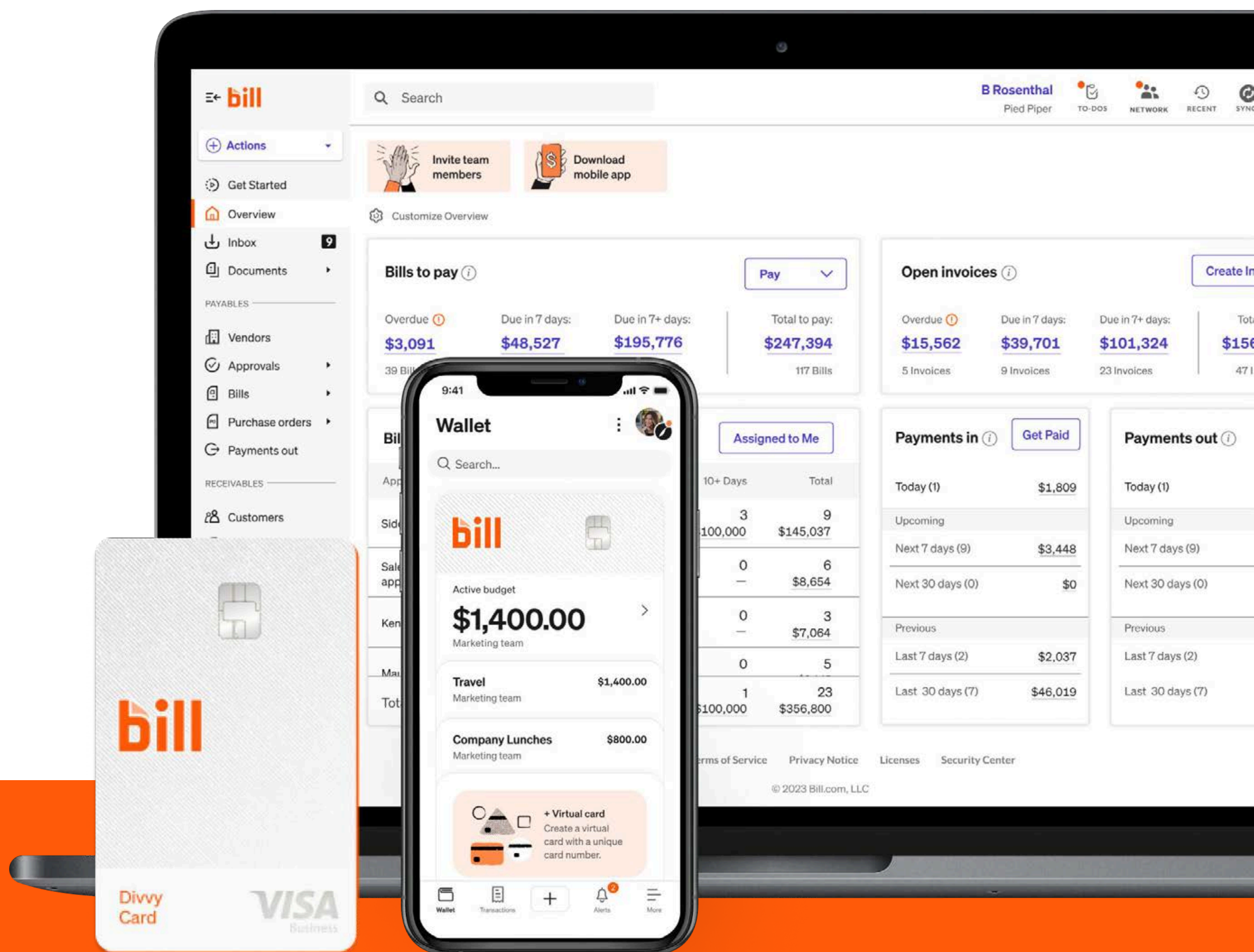
- Additional budgets and best practices
  - [Recurring vs non recurring budgets](#)
  - Limiting [Custom Fields](#) by budget
- Approval Flows
  - [Transaction limits](#)
  - [By manager](#)
- [Reimbursements](#)
- [Transaction table](#) best practices
- Custom Fields
  - [Additional fields for tracking](#)
  - [Note/Receipts by transaction amount](#)

Different clients will benefit from different controls and your Partner Manager can help advise and guide you on client-specific questions. They can also help guide you along with our implementation team on adding in needed features. For general guidance on setting up additional controls and information on what controls are available, you can also visit our [help center](#).



# Ready to help your clients spend smarter?

Reach out to your partner success manager today or visit [\*\*bill.com/for-accountants\*\*](https://bill.com/for-accountants)



©2025 BILL Operations, LLC. All rights reserved. BILL and the BILL Logo are trademarks belonging to BILL Operations, LLC. Other company names and brands are the property of their respective owners. Testimonials/quotes are personal experiences of BILL customers and partners. 26937-2951-12

The BILL Divvy Card may be issued by one of Divvy Pay, LLC's [bank partners](#). The BILL Divvy Card is not a deposit product. For your specific lender, see your Card Agreement.

