

Sell QuickBooks Merchants with Biller Genie



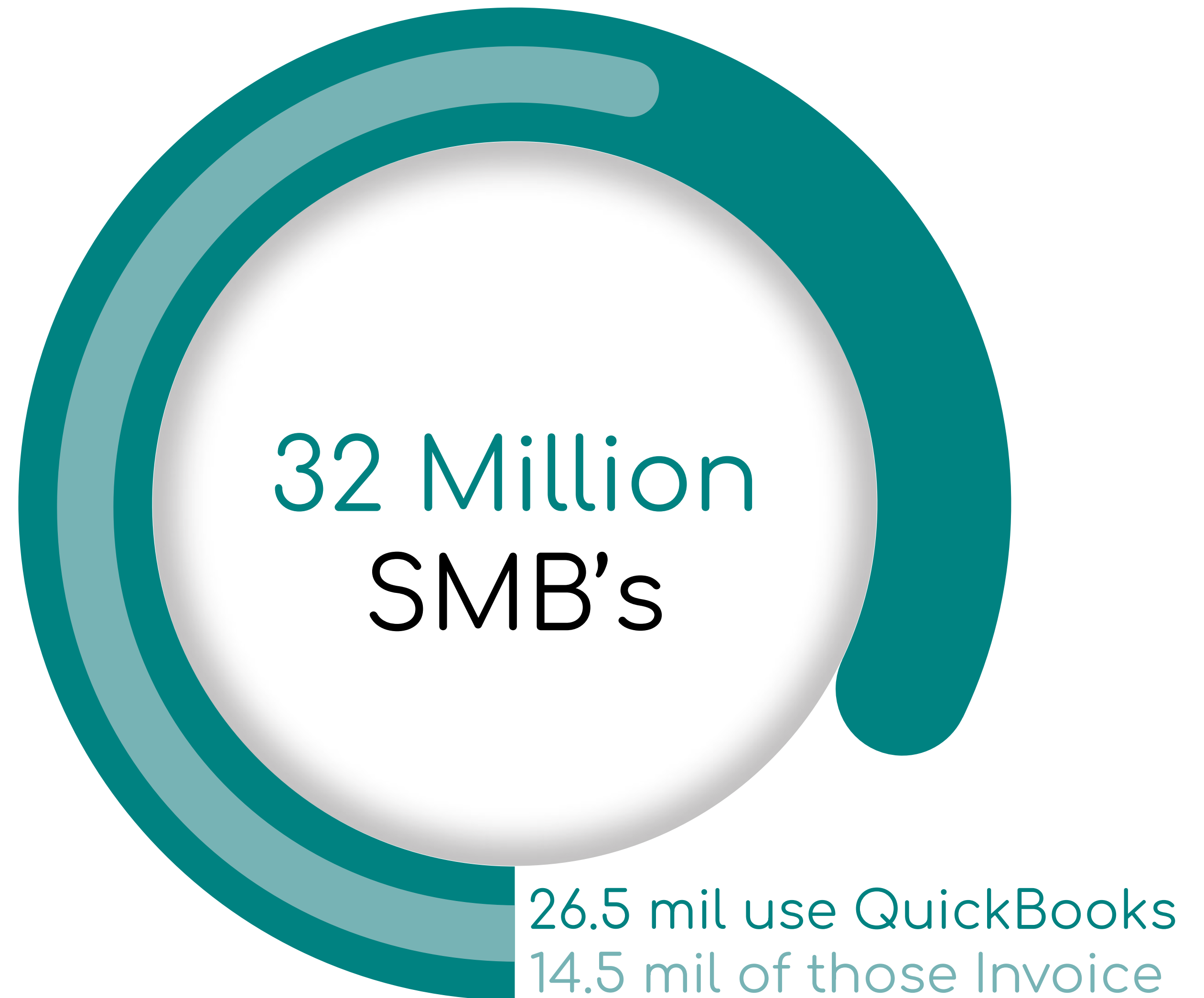
3 Essentials For Effective Invoicing

1. Send Out Invoice on Time
2. Ensure Data Integrity
3. Easy Pay Options



There are 15 million merchants who use QuickBooks and invoice their clients.

- 32 Million SMB's
- 📊 83% use QuickBooks
- 📊 55% of those invoice



Primary Verticals We Serve

Home Maintenance	Construction Services	Professional Services	Recurring Services	B2B
• Lawn Care • Pool Care • Pest Control • Cleaning and Maid Services • HVAC	• Plumbers • Electricians • Carpenters • Painters • Roofers • Tilers • General Contractors	• Law Firms • Marketing Firms • Accountants/CPAs • Printing/Promotional Services • Consulting/Business Development	• SaaS Companies • Personal Training • Magazines • Gyms • Spas and Wellness	• Manufacturers • Logistics • Distributors • Freight Forwarding • Suppliers

Target Market



Card Not
Present



\$50K+ Monthly
Processing



Currently Using
QuickBooks

Create

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



Step 1

Step 2

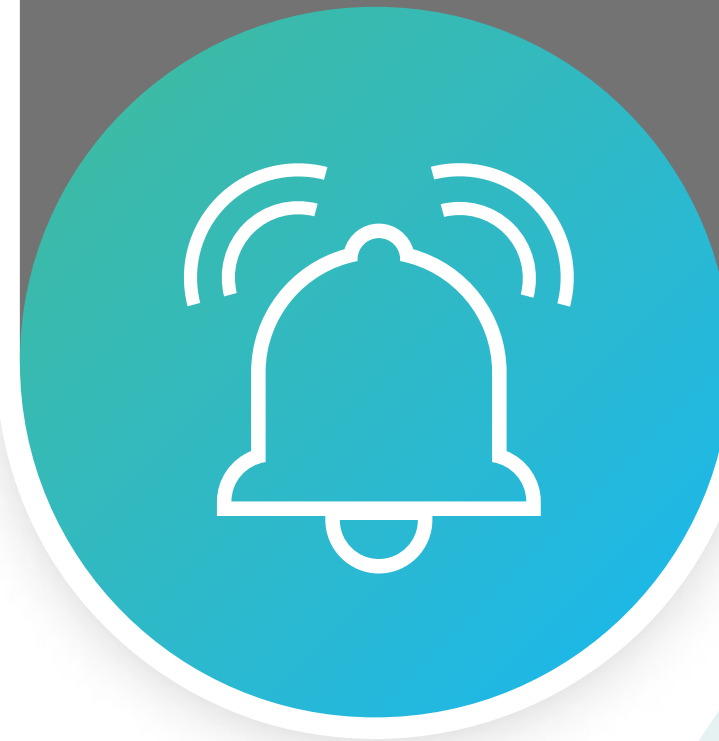


Send

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, making reconciliation easy.

Common Invoicing Issues

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



How Does it Work



Sync



Customize



Create



Email



Accept



Reconcile



Sync QuickBooks With Biller Genie



- 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!

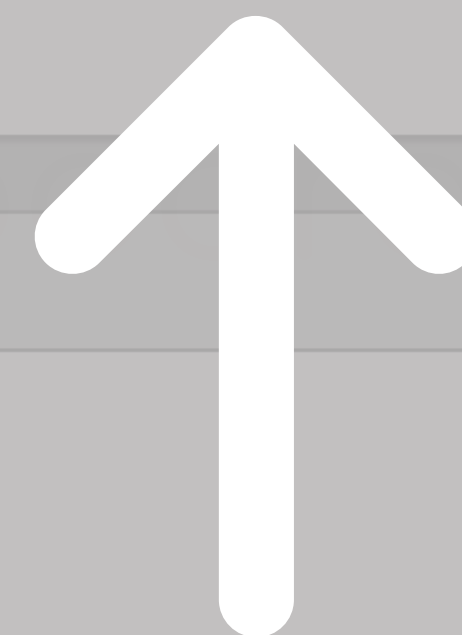
Connect to QuickBooks

Support

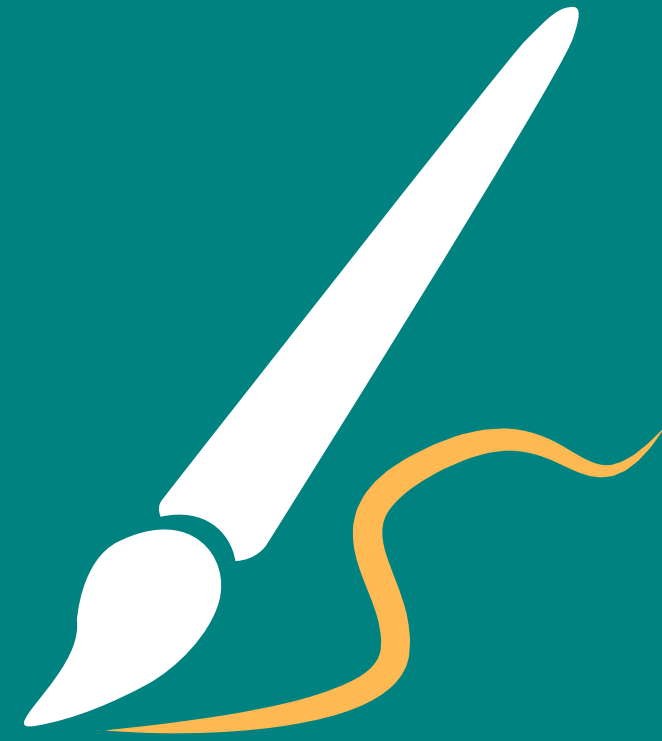
Have a question?
[Learn about QuickBooks integration](#)
or
[contact support.](#)

Latest Sync Results

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



 Get Started ⁰



Customize Invoice Branding



Sync



Customize



Create



Email



Accept



Reconcile

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

Thank you for doing business with us!



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

Edit company

bgdemo2023@gmail.com

Add logo

Max size: 1 MB

John Smith

Bill to

John Smith
JS Contracting
1234 Zazu Way
Orlando, FL 32839

Edit customer

Invoice no.

1002

Terms

Net 30

Invoice date

04/03/2023

Due date

05/03/2023

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

Middle name

Last name

Suffix

Company name

Email

Mobile number

Other

Name to print on checks

☐ Is a sub-customer

John

Smith

JS Contracting

jstest@billergenie.com

(444) 555-6666

John Smith

Customer display name *

Phone number

Fax

Website

John Smith

Save

billergenie

Home

Customers

Invoices

Sales Receipts

Items

Reports

Control Panel

Add-ons

Add-ons Marketplace

Help Center

Feature Tour

 [Get Started](#)

Customers > Invoices

Sync

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
Click to Filter	Click to Filter	Click to Filter	Click to Filter	Click to Filter	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

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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



Sync



Customize



Create



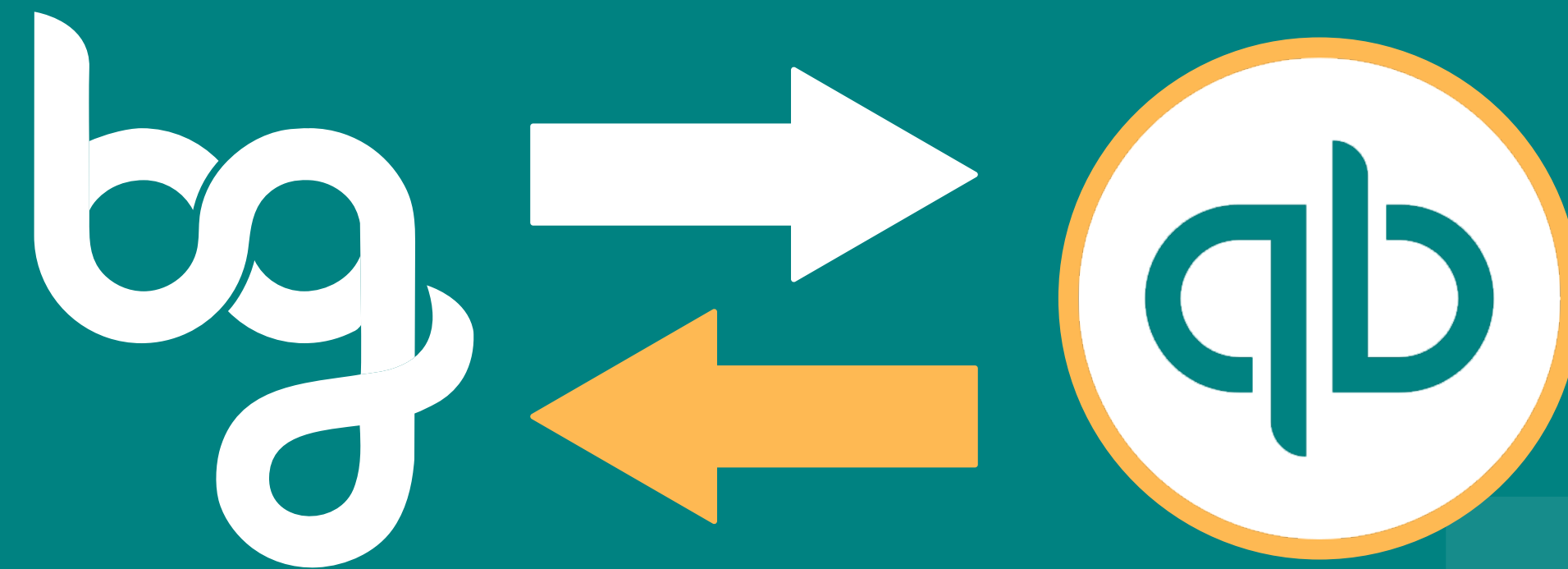
Email



Accept



Reconcile



Invoices are Reconciled in Real Time





Minimize Administrative Work

- Streamlined invoicing
- Automated reconciliation
- 100% data integrity



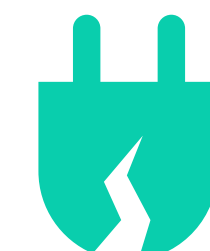
vs.



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



No Contracts



\$24.95/ month



Setting Up Your Merchant

Create the Merchant / Gateway Account

CC / ACH

payroc

CLEARCENT™
INTELLIGENT PROCESSING

maverick

nmi

accept.blue®

USAePAY

iCG Innovative
Payment
Solutions

fortis

CC Only

intuit
QuickBooks.
Payments

TEMPUS
TECHNOLOGIES™

MERCHANT

PayTrace®

PHOENIX
MANAGED NETWORKS

cardpointe

ACH Only

FIRST ACH
Better Payments



Complete the Rapid Onboarding Form

BILLER GENIE SIGN UP FORM

Company Information

Legal Name

DBA Name

Merchant's
Name

Telephone

 Email Address

Address



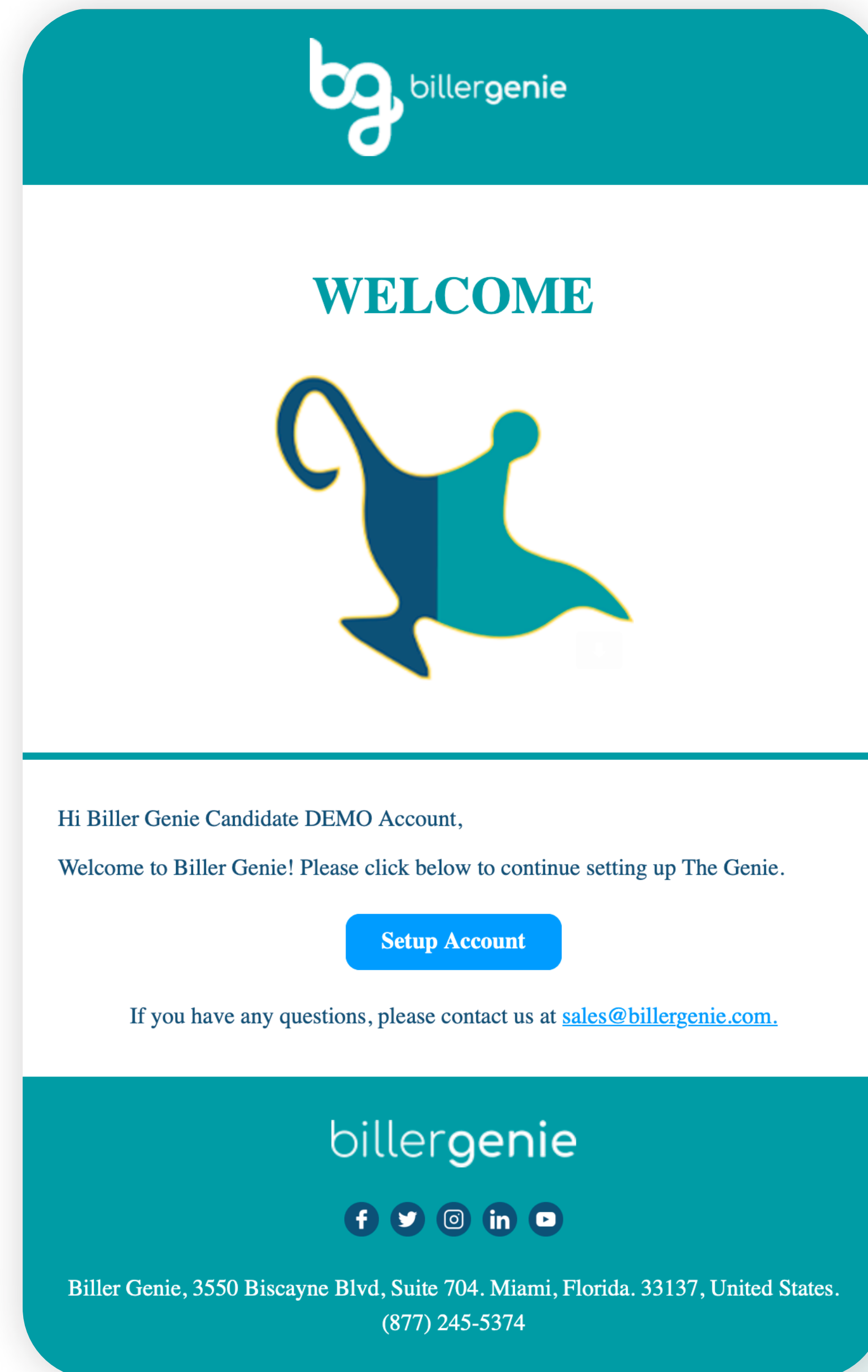
 External ID

Projected
Volume



MCC Code

Merchant Receives Welcome Email



Welcome to **Biller Genie**

