

Help !!!! I am a client of a digital office

1 How do you as a client work most easily with Billtobox

- 1) Arrange a Billtobox account with Isabel Claes. If we create your Billtobox, it's cheaper for you.
- 2) Download the Billtobox app on your smartphone, it's free

It is important to go through the following steps (daily or weekly) in the same order so that it becomes, in the shortest time, a system, and actually takes no time at the end of a quarter.

1.1. Process receipts instantly

Receipts quickly disappear into a handbag or wallet. Having to look for them afterwards, when the accountant asks for them, costs negative energy and frustration. The solution is simple:

- 1) Never pay receipts with cash but always pay with a card, then a trace of the payment remains in your accounts
- 2) and immediately, and by that I mean instantly with the BillToBox app, take a picture of the receipt.

1.2. Process Purchase invoices daily

- 1) If you received an invoice through the post, scan the invoice and (mail¹ or) drag it to your Billtobox.
- 2) If you have received an invoice via e-mail, mail or drag it to your Billtobox.
- 3) And if you want it really easy, ask all your suppliers to mail your invoices directly to your Billtobox.
- 4) If there are, see "Filter remaining document tasks" at the top of the screen, solve them immediately².

1.3. Process sales invoices daily

- 1) Create your sales invoices daily with the Billtobox application and send them immediately to the client.
- 2) However, if you make a lot of invoices with another software, we will have to look together for a link to your software so that those invoices do not have to be scanned and sent to Billtobox.

¹ You can link an e-mail address to Billtobox. You can use it yourself.

² These are invoices received together with an attachment or text in the mail. Billtobox then asks you to indicate which document is the invoice and which are the attachment(s)

1.4. Process Marking sales invoices as paid is done on a fixed day in the week

- 1) Look at your bank account for the past week and mark the sales invoices that have been paid.
- 2) Then also look at the expiry date of the authorisation on your bank account. Should it expire soon, renew it immediately.

1.5. Process Reminding customers to pay is done every 14 days

Many entrepreneurs find it difficult to send reminders. They are afraid of irritating and losing the customer. Therefore, they often do nothing. Bear in mind that some companies only pay after they have received a reminder.

- 1) The sales invoices overview in Billtobox shows the invoices that have not yet been paid. The status indicates how long they should have been paid.
- 2) Send a reminder to those customers who have yet to pay³.

1.6. Process Pay purchase invoices is done on a fixed day in the week

- 1) You start in Billtobox on the overview of your purchase invoices.
- 2) By selecting the status "to accept" you can view and accept the invoices of the past week one by one.
- 3) By selecting the status "past due" you can see which invoices are urgently due for payment. This is the time to pay all those invoices now too.
- 4) However, if you have a lot of payments to make, you can use Billtobox's payment module at an additional cost. That reduces the time you spend on payments.
- 5) You mark the paid invoices "as paid".

1.7. Proces inform your Accountant at the end of the month

Als in het begin van de maand alle aankoop- en verkoopfacturen van de vorige maand in Billtobox zitten geef dan een seintje aan je accountant dat je die vorige maand afgewerkt hebt.

At the beginning of the month, if all purchase and sales invoices from the previous month are in Billtobox give a signal to your accountant that you finished that previous month.

2. Benefits of these procedures

By following these processes, you as a business owner are already very well informed about the financial happenings in your business. You process a lot of information and that information, your information comes to us automatically.

³ This is not yet automated in Billtobox but that is on their planning. I don't know when that will be realised. If you need an example, feel free to ask us..