

Spend Management Platform

Migrating Vendors to Airbase

Many companies transition to Airbase from systems like Bill.com because of Airbase's ability to manage all spend types — bill payments, corporate cards, and expenses — in one system. One key question customers ask is, how do they get their vendors moved over to Airbase? This document details the two approaches available for you to import your vendors. Our team of onboarding experts is in place to help you make the best decision and get you up and running quickly with minimal effort on your part. This service is included with your implementation of any paid package.

APPROACH #1

Use the standard export readily available from your existing system.

Overview: With this approach, a standard data export must be available from your existing system (i.e., Bill.com, GL system, etc.). In this case, the data transferred to Airbase will be as good (or as bad) as the data you have in your current system. For example, vendor payment information will transfer over, but any misspelled vendor names will also be transferred over.

If you choose this approach, you'll need to decide whether or not you want to invite your vendors to the Airbase vendor portal. The vendor portal allows vendors to input important payment information, upload contracts and tax documents, and track payments — saving you time. If you want to invite your vendors to the Airbase vendor portal, the following steps will be taken:

1. You'll need to send a communication to all vendors stating that they can expect an email invite from Airbase requesting they share their payment information through the Airbase Vendor Portal.
2. The Airbase Service Operations team will process the vendor data you provide and simultaneously send the Vendor Portal invite to your vendors.
3. Your vendors will log into the Airbase Vendor Portal and enter their information and payment details.
4. You'll be able to immediately process payments for bills as they come.

If you decide not to invite vendors into the Airbase Vendor Portal, the following process will be taken:

1. The Airbase Service Operations team will process the vendor data you provided WITHOUT sending the invite to your vendors.
2. You'll need to enter the vendor payment details as bills are processed in Airbase.

Pros and Cons:

Pros	Cons
<ul style="list-style-type: none"> • Data can be easily extracted from your system into Airbase. • The process can be started as soon as your Airbase account is ready. • You'll have better control of the data that will be processed by Airbase (e.g., you can filter out inactive vendors from the export file, etc.). 	<ul style="list-style-type: none"> • Bill.com doesn't include vendor payment information in their readily available export. • Vendor payment information may be stored outside of the current system.

APPROACH #2

Use the paid export from Bill.com.

Overview: With this approach, you'll request (and pay for) the data export directly from Bill.com. The process and fees required to request the data are outlined [here](#). Once you receive the data export from Bill.com, you'll need to follow these steps:

1. Immediately download the data export provided by Bill.com as there is a time limit to access it.
2. Share the data with the Airbase Service Operations team, who will process the Bill.com data export. We'll take the following steps to ensure data accuracy:
 - a. Creator A will process all data and capture the vendor payment details.
 - b. Creator B will process the same set of data as Creator A and capture the vendor payment details.
 - c. When the payment details from both entries match, the data is uploaded to the system.
 - d. If the data from A and B don't match, these vendors are flagged for further review.
 - e. Flagged vendors are further reviewed and information corrected before their payment info is uploaded.
3. You can immediately process payments for vendors with complete payment details.
4. For vendors with incomplete payment details, you'll need to enter the vendor payment details, or invite the vendors to the Airbase vendor portal.

Note: For this approach, Airbase will not send an email invite to your vendors (unlike in Approach #1).

Pros and Cons:

Pros	Cons
<ul style="list-style-type: none">• If the export from Bill.com has the full payment info, the vendor is immediately ready for payment processing in Airbase once the migration process has been completed.	<ul style="list-style-type: none">• Timeline and data quality are influenced by Bill.com.• Process is dependent on when Bill.com provides the data.• If the vendor payment information is not included in the face of the invoices sent by the vendor, the resulting data in Airbase will, at most, be the same as Approach #1, less the additional cost and waiting time spent for the paid Bill.com export.

Airbase modern spend management combines guided procurement, accounts payable automation, expense management, and corporate cards. It's the best way to control spending, close the books faster, build a culture of compliance, and make teams more productive. Airbase brings efficiency to approvals, accounting, and payments with a process employees love.

Learn more: www.airbase.com | team@airbase.io