

Getting started with international bills

COMPREHENSIVE GUIDE



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1

Setting up users and budgets for bills

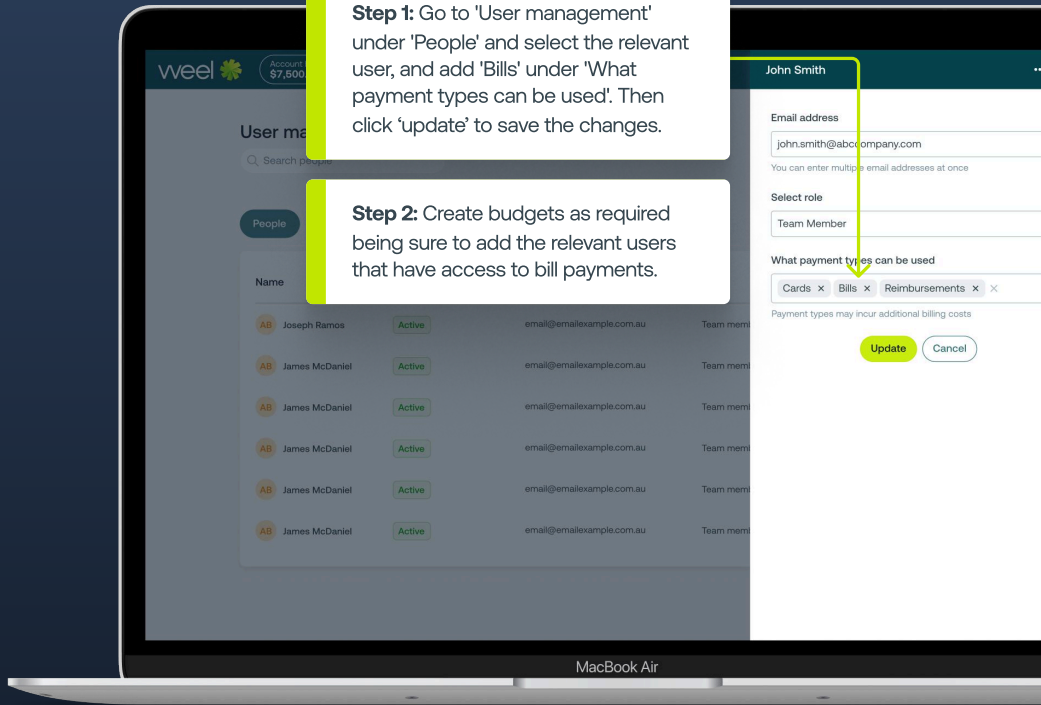
FOR ADMINS ONLY

Allow only relevant users to access bills payment types and create a budget specifically for bills.

Pro tip: You can pay bills from any budget and increase the spending limit for bills by either setting a higher limit for a specific user or creating a separate budget with a higher overall spending limit.

Step 1: Go to 'User management' under 'People' and select the relevant user, and add 'Bills' under 'What payment types can be used'. Then click 'update' to save the changes.

Step 2: Create budgets as required being sure to add the relevant users that have access to bill payments.



2

Creating a bill

How to email-in an invoice

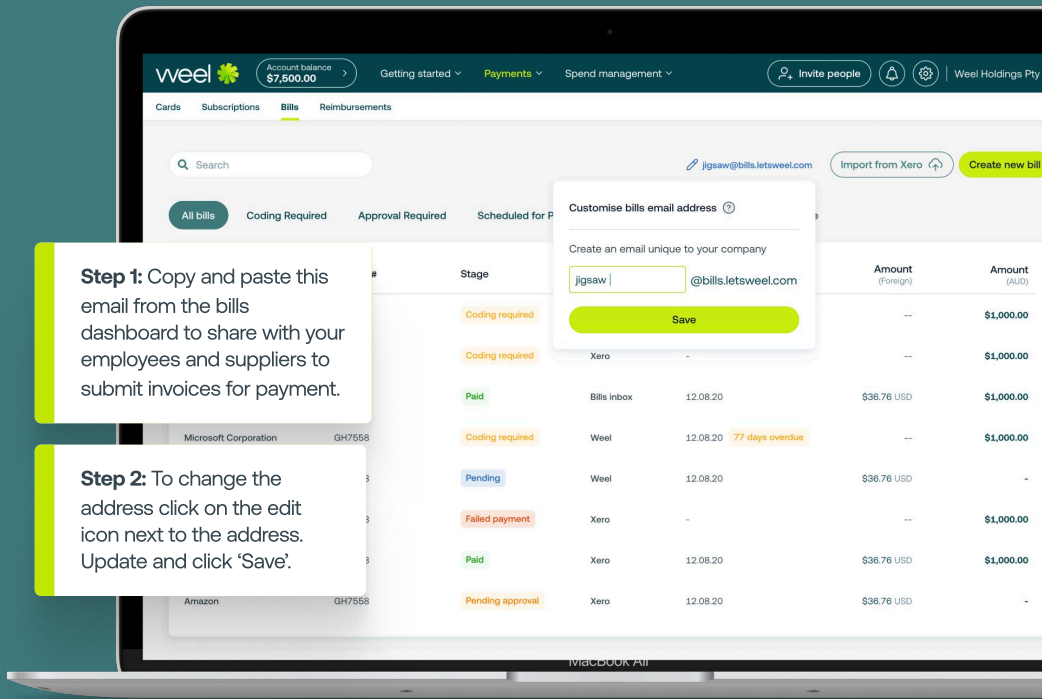
FOR ALL USERS

When you activate your bills feature, a pre-generated email address is created. You can create new bills simply by emailing an invoice to this address. We will only create a new bill for you if a PDF document is attached, so no junk bills are created from PNGs!

Pro tip: If an invoice is emailed-in from an email address of a user in your account they will be automatically populated as the bill owner. Old email-in addresses remain active so any they've shared with suppliers continue to process bills.

Step 1: Copy and paste this email from the bills dashboard to share with your employees and suppliers to submit invoices for payment.

Step 2: To change the address click on the edit icon next to the address. Update and click 'Save'.



3

Creating a bill

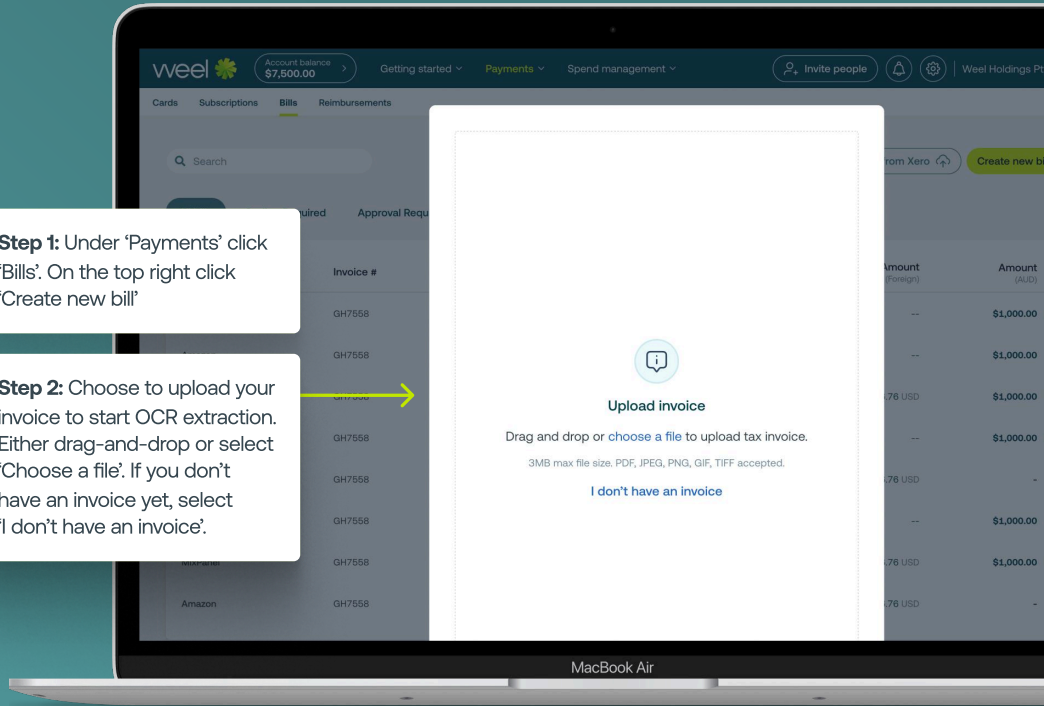
Uploading an invoice

FOR ALL USERS

Use our drag-and-drop feature or upload an invoice to pay your suppliers and have the invoice details automatically extracted.

Step 1: Under 'Payments' click 'Bills'. On the top right click 'Create new bill'

Step 2: Choose to upload your invoice to start OCR extraction. Either drag-and-drop or select 'Choose a file'. If you don't have an invoice yet, select 'I don't have an invoice'.



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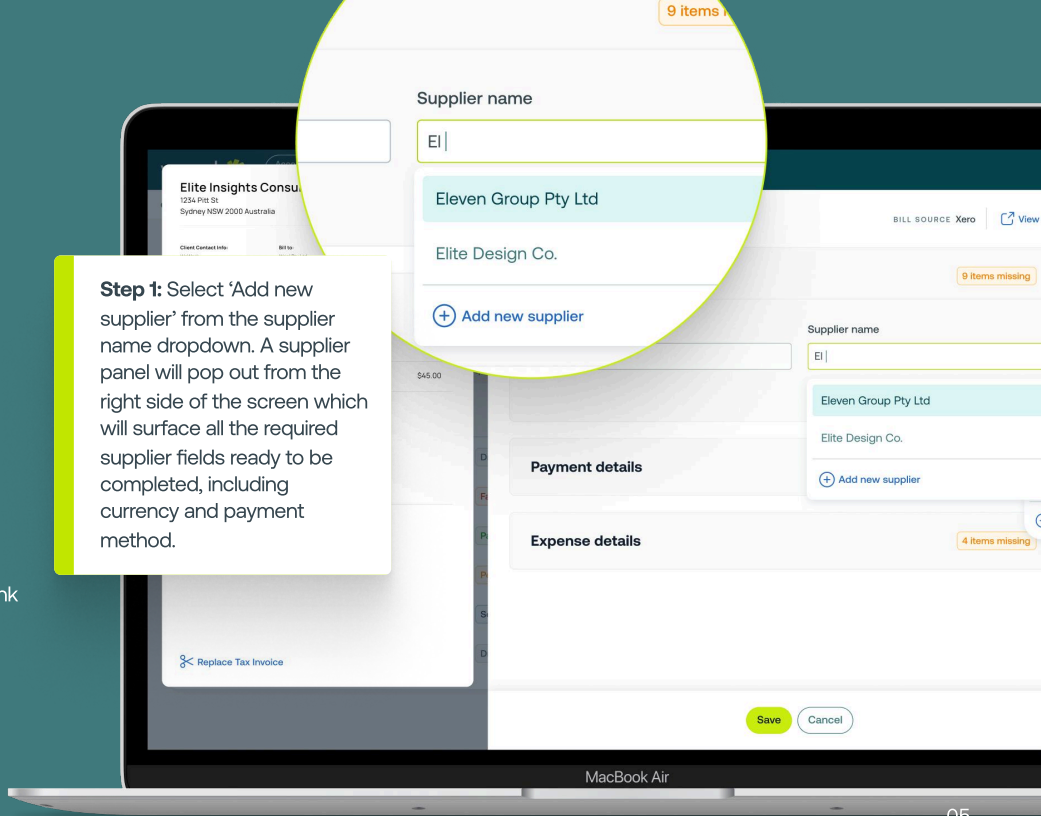
Creating a bill

Creating a new international supplier

FOR ALL USERS

In the Create Bill form, click inside the input field under Supplier name. You'll see a dropdown of existing suppliers. You can choose to select an existing supplier or click the "Add new supplier" link to create a new one.

Step 1: Select 'Add new supplier' from the supplier name dropdown. A supplier panel will pop out from the right side of the screen which will surface all the required supplier fields ready to be completed, including currency and payment method.



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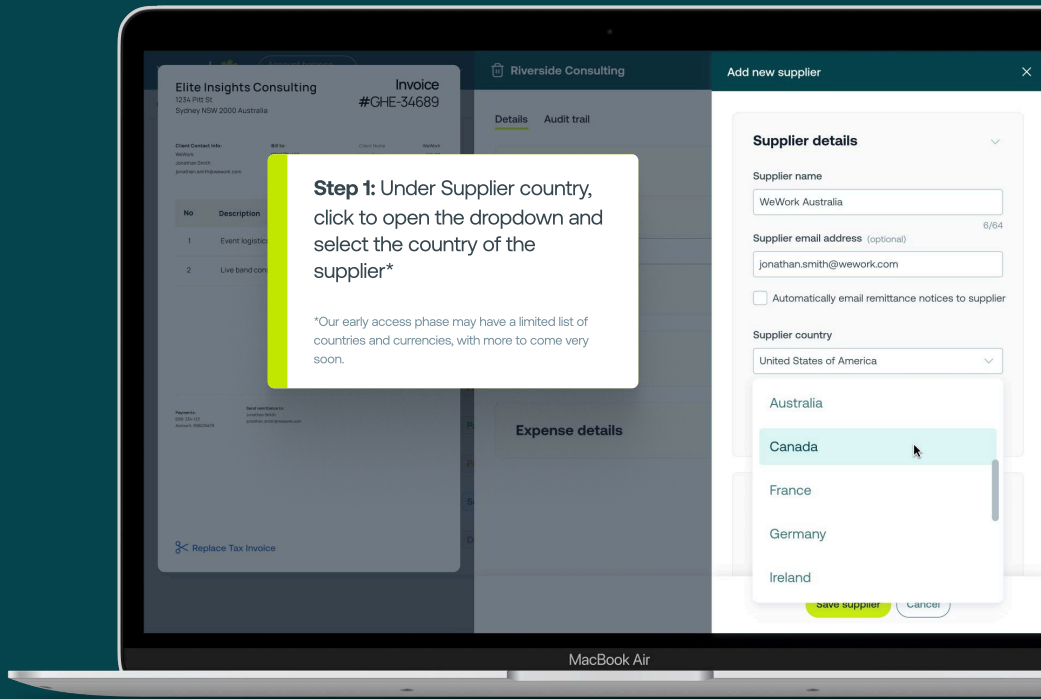
Creating a bill

Adding supplier details

FOR ALL USERS

To create a new supplier, all required fields must be completed.

Pro tip: Supplier email is optional, but if you'd like to send remittance advice to your supplier on payment automatically, you'll need to ensure this field is complete.



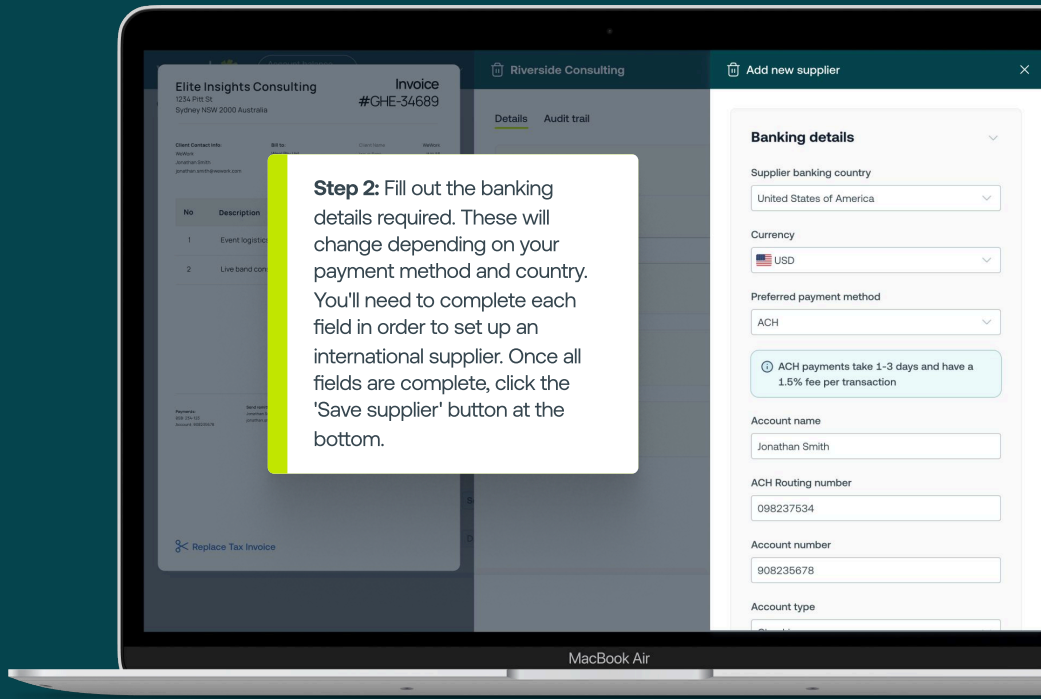
7

Creating a bill

Adding supplier details

FOR ALL USERS

To create a new supplier, all required fields must be completed.



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Editing a saved supplier

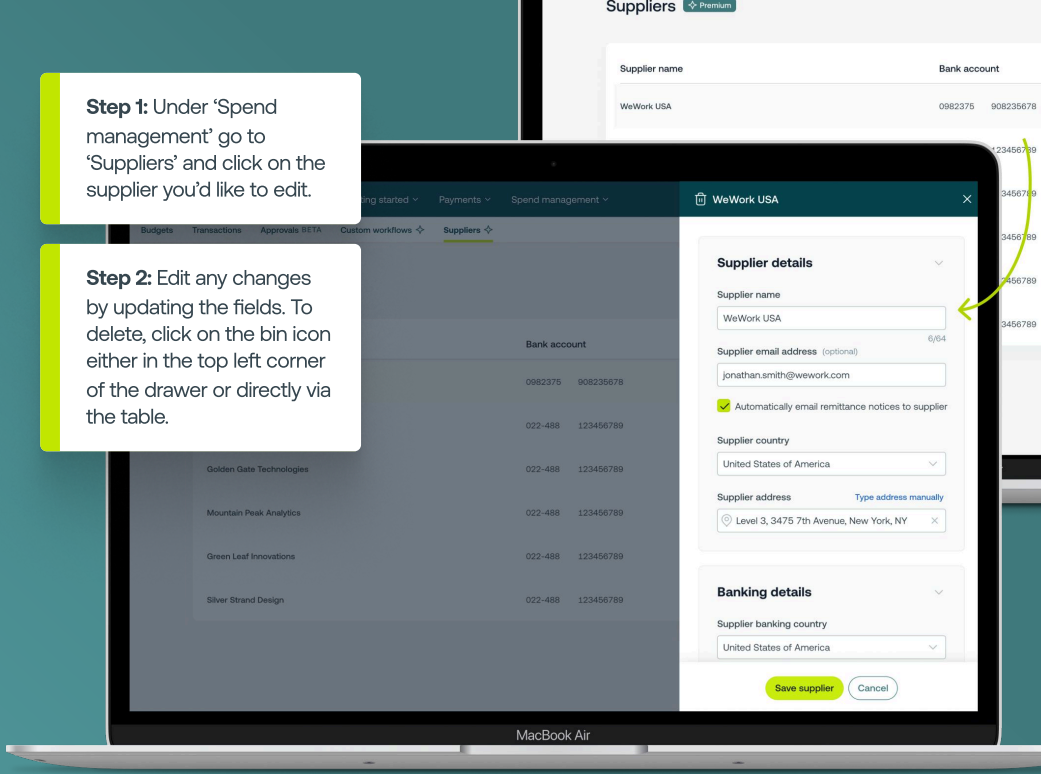
FOR ADMINS ONLY

Admins (or custom roles with supplier permissions) are able to edit or delete a supplier at anytime.

Pro tip: Updates to suppliers apply to unpaid bills only. Paid bills won't be updated. If you delete a supplier, unpaid bills will revert to 'Coding required'. Deleted suppliers won't be removed from paid bills.

Step 1: Under 'Spend management' go to 'Suppliers' and click on the supplier you'd like to edit.

Step 2: Edit any changes by updating the fields. To delete, click on the bin icon either in the top left corner of the drawer or directly via the table.



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Creating a bill

Submitting your international bill

FOR ALL USERS

To submit an international bill, all required fields must be completed.

The currency of the bill will be derived from the supplier. You'll be able to review the FX details, including the estimated FX rate, estimated FX fee and an estimated total amount in AUD before submitting the bill.

Once the bill form is completely filled out, click the 'Save' button and your bill will be submitted for approval.

[Replace Tax Invoice](#)

Expense details

2 items missing

Bill owner

Jonathan Smith

Budget

Marketing events

Category	Description	GST	Amount (Excl.GST)
Business services	Event logistics	\$ 0.00	\$ 100.00
Entertainment	Live band consult	\$ 0.00	\$ 59.50

[Add line item](#)

TOTAL: **\$159.50** USD

Foreign exchange (FX) details

Estimated FX rate: **\$1 AUD = \$0.6545** USD
Valid until 6 Aug 2024, 2:00pm AEST

Estimated converted amount: **\$243.70** AUD

Estimated FX fee: **0.95% = \$2.32** AUD

Estimated total amount: **\$246.02** AUD

You acknowledge that the FX rates, fees, and final payment amounts shown are estimates only and will change based on the prevailing market FX rate at the time of payment processing. For details [click here](#).

Save

Cancel

MacBook Air

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Viewing a remittance

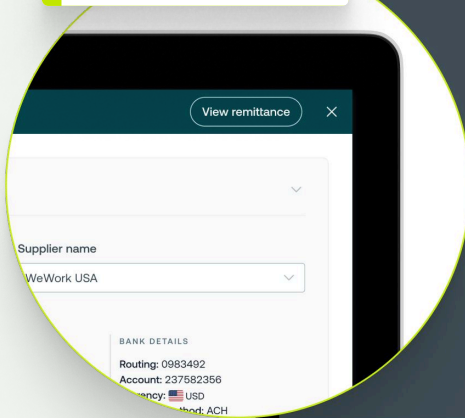
FOR ALL USERS

All paid bills now have a remittance advice PDF available for view and download.

Pro tip: Select the 'Paid' tab on your bills table to filter your list of 'Paid' bills.

letsweel.com

Step 1: Open your paid bill. Click "View remittance" in the drawer header.



Remittance notice

weel 

Payout date	Transaction ID
27/10/24 12:02:28am AEST	457bac52-1ddc-400f-99e8-d63e758db134

From	Wallet Account
To	WeWork USA

International payment
\$159.00 USD

Method	ACH	Routing number	03495349
Account name	Jonathan Smith	Account number	230993402

Reference
410109982C

Step 2: Your remittance will open in a new tab in your browser as a PDF, ready to download.

How to approve a bill

FOR APPROVERS

Approving a bill is the same as approving a supplier.

Pro tip: Approvers will see a “New supplier” alert if the supplier hasn’t been approved or paid in the past

Step 1: Once a bill has been coded, an approval notification will be sent to the assigned approver. The approver can open the bill from the ‘Approvals’ screen.

Step 2: The approver reviews all of the bill details and clicks ‘Approve and pay now’ for bills that are scheduled for today and “Approve and schedule payment” if the bill is scheduled for a future date. The bill will automatically be paid on the ‘Automatic payment date’.

The screenshot displays the Weel software interface. At the top, the 'Approvals' section is active, showing a 'Pending approval' button and a 'History' link. Below this, a detailed view of a bill from 'WeWork USA' is shown. The bill details include the invoice number 'GHE-34689', the supplier name 'WeWork USA', and the supplier address: 'Level 3, 3475 7th Avenue, New York, NY 10023, United States'. The bank details are also visible: 'Routing: 0983492, Account: 237582356, Currency: USD, Payment method: ACH'. The payment details section shows the payment reference '34DJF345' and the invoice date '11.11.24'. At the bottom of the bill details, there are two buttons: 'Approve and pay now' (green) and 'Decline' (red).

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How do bills get paid?

FOR ALL USERS

Bills are paid automatically, on the scheduled date.

Pro tip: Select the 'Paid' tab on your bills table to filter your list of 'Paid' bills.

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Elite Insights Consulting Invoice #GHE-34689
23 Levington Ave, New York, NY USA

Client Contact Info: Elite Insights Consulting, Jonathan Smith, jonathan.smith@eliteinsights.com
Bill to: Elite Insights Consulting, Makenna Lee
Client Name: Elite Insights Consulting
Invoice Date: 11.09.24
Due Date: 11.09.24
Invoice Total: \$145.00 USD

Qty	Subtotal
1	\$100.00
1	\$45.00

Invoice date ? 11.09.24
Automatic payment date ? 09.10.24

Approve and pay now Decline

Supplier details
Payment details
Expense details

Payment reference: 34DJF345
Invoice date: 11.09.24
Invoice due date: 11.10.24
Automatic payment date: [calendar]

October 2024
Su Mo Tu We Th Fr Sa
1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28
30

Save Cancel

Step 1: Complete all payment details and enter 'Automatic payment date'.

Step 2: Once approved, the bill will be paid automatically on this date.

How bills in Weel sync with Xero

FOR ADMINS ONLY

Bills created in Weel automatically stay up to date in Xero as the bill progresses through the workflow stages.

Step 1: When a bill in Weel is listed as 'Coding required' it will automatically appear in Xero as a 'Draft'. Once approved, it will update to 'Scheduled for payment' in Weel and 'Ready for payment' in Xero.

Step 2: Once the bill has been paid in Weel you can reconcile the bill against the payment in Xero.

Merchant	Type	Category	Amount	GST	Tax Involvement
Facebook	Card payment	General Expenses	-\$1,250.00	\$2.00	+
Origin Energy	Bill payment	Select a category	-\$65.00	\$2.00	+
SendGrid	Reimbursement	Business Expenses	-\$45.00	\$2.00	5
Teletra Corpora...	Bill payment	Business Expenses	-\$345.00	\$2.00	5
iNet Limited	Bill payment	Software	-\$255.00	\$2.00	5
Google	Card payment	Meal	-\$40.00	\$2.00	5
City of Sydney...	Bill payment	General Expenses	-\$460.00	\$2.00	5
Google	Card payment	Business Expenses	-\$140.00	\$2.00	5
Suncorp Group...	Bill payment	Software	-\$470.00	\$2.00	5
Weel	Manual adjustment	Business expenses	-\$15.00	\$1.50	5

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