

# How to Create a Bill

## Summary

This tutorial covers how to create and manage bills in BuilderPal to record vendor invoices, match them to purchase orders, and integrate with project financials for accurate accounting and payments.

## Prerequisites

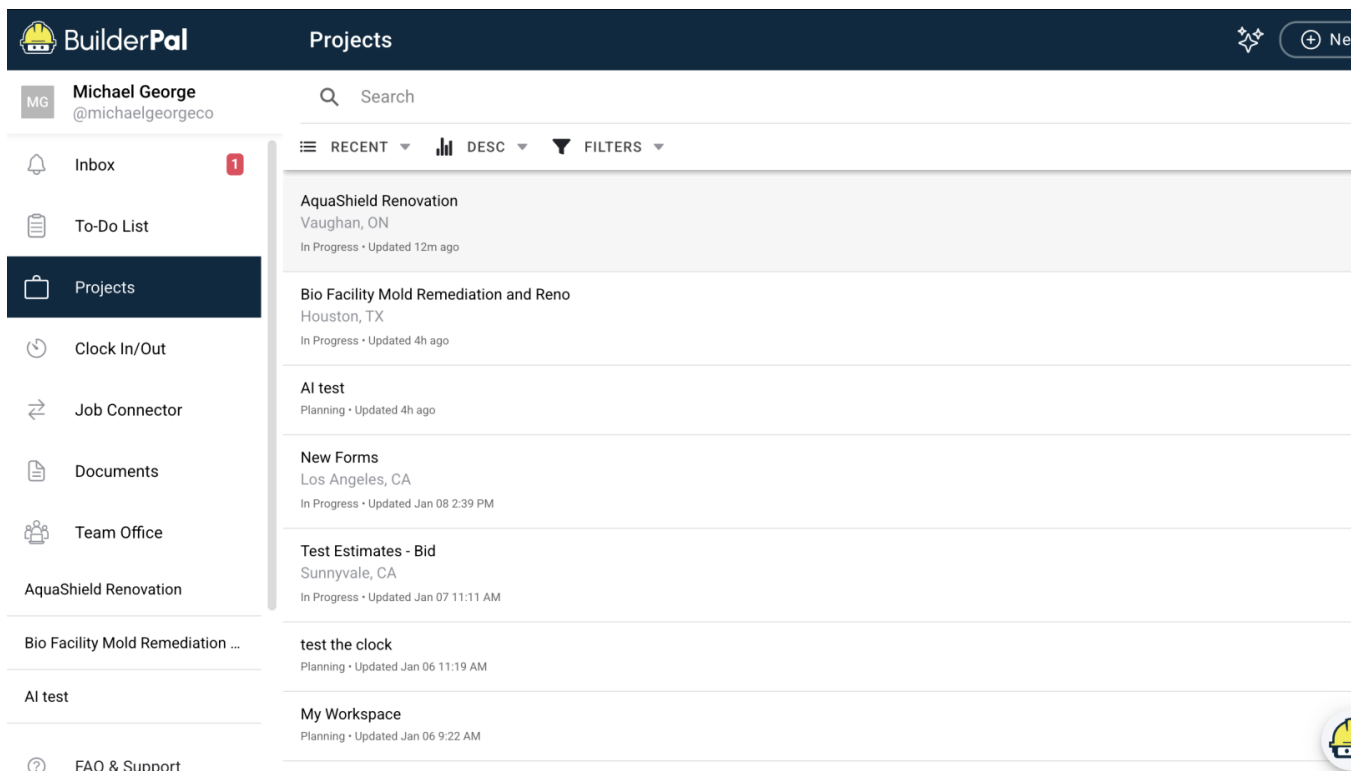
- Role or permission needed
- An active project set up in BuilderPal
- Vendor invoice details or a related purchase order ready

## Steps

There are two ways to create a bill in BuilderPal: from the project overview or from the Actions tab.

### Method 1: From the Project Overview

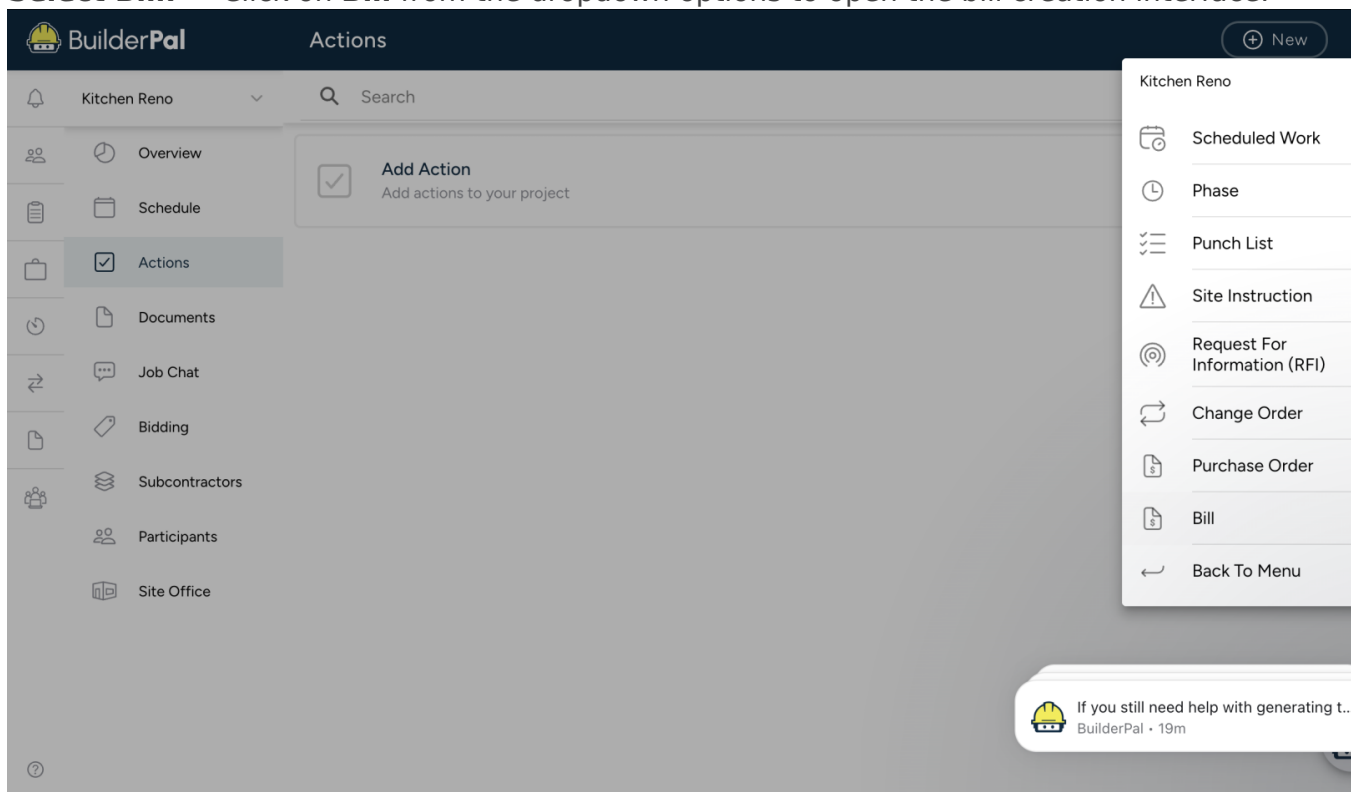
1. **Log in to BuilderPal and select your project.** — Open the BuilderPal app, enter your credentials, and choose the project from the dashboard.



2. **Access the project menu.** — In the project overview screen, locate the dropdown menu next to the project name in the top right corner.

**Select Actions.** — In the dropdown menu, select Actions

3. **Select Bill.** — Click on **Bill** from the dropdown options to open the bill creation interface.



## Method 2: From the Actions Tab

1. **Navigate to your project.** — Log in to BuilderPal and select the desired project from the dashboard.
2. **Go to the Actions tab.** — On the left sidebar, click **Actions** to open the actions overview.
3. **Click the + New button.** — In the top right corner of the Actions screen, click the + **New** button to open the add action menu.
4. **Choose Bill.** — From the dropdown menu, select **Bill** to start creating a new bill.
5. **Enter bill details and Save**— Fill in the vendor, bill number, date, due date, line items (amounts, descriptions, cost codes), match to existing PO if applicable, attach the invoice PDF or image, and add notes.

## Confirmation

You'll know it worked when the bill appears in the Actions overview, and approvers or payees receive notifications.

## FAQ

Q: What fields are required for a bill? A: Vendor, bill number, date, amount, and line items with cost codes for budget tracking.

Q: Can bills be matched to purchase orders automatically? A: Yes, if a PO exists for the vendor, BuilderPal suggests matching during creation.

Q: How do I handle partial payments on bills? A: After approval, update the bill status with payment details or create linked payment records.

Q: What if a bill needs approval? A: Assign approvers based on roles; they receive notifications to review and approve/reject.

Q: Are bills integrated with accounting exports? A: Yes, approved bills can be exported to QuickBooks or other systems via integrations.

## Related Articles

- [Working With Actions](#)
- [RFIs](#)

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