



FLUXX



bill



# Fluxx + BILL Integration

Automate payment syncs for faster, error-free disbursements

Grantmakers use both Fluxx and BILL (formerly Bill.com) to manage financial disbursements. When these systems work together, teams eliminate manual entry, speed up payment cycles, and ensure accurate recordkeeping.

The **Fluxx integration with BILL** enables real-time, bi-directional data sync for payments and vendors. This allows organizations to work in the system of their choice—without compromising data quality or compliance.

## COMMON USE CASES

**Program Officers:** Push meeting notes from Salesforce into Fluxx to inform grant reviews

**Finance Teams:** Automatically push Fluxx-approved payments to BILL

**Grants Managers:** Track payment status and confirmation directly in Fluxx

## KEY BENEFITS

### Reduce Manual Work:

Sync payments, vendors, and statuses every 5 minutes to eliminate duplicate entry and manual uploads

### Improve Accuracy:

Minimize errors with automated data mapping, validation checks, and integration logs

### Simplify Compliance:

Capture a full audit trail across both systems, with all updates logged in Fluxx's Integration Log

### Real Time Status Updates:

See BILL payment confirmations reflected in Fluxx—including paid amounts, dates, and references

**Dynamic Mapping:** Pull custom coding dimensions like Chart of Accounts, Department, and Program from Fluxx to BILL



## What Syncs Between Fluxx and BILL

ENTITY	FLUXX RECORD	BILL OBJECT	SYNC TYPE	WHY IT MATTERS
<b>ORGANIZATIONS</b>	Organization	Vendor	Fluxx → BILL	Automatically create or update vendors based on grantmaking activity
<b>PAYMENTS</b>	Payment	Bill	Fluxx → BILL	Create bills in BILL when payments are marked “Ready for Payment” in Fluxx
<b>STATUS UPDATES</b>	Payment (Paid State)	Opportunity (or custom object)	Fluxx → BILL	Update Fluxx when bills are paid in BILL, including payment confirmation fields

*Includes support for Chart of Account, Department, Location, Job, and Initiative Code mapping from Fluxx to BILL*

## HOW THE INTEGRATION WORKS

- **Every 5 minutes:** Sync runs between Fluxx and BILL via Workato middleware
- **Triggers:**
  - New/updated Organization → creates/updates Vendor in BILL
  - Payments marked “Ready for Payment” → creates Bills in BILL
  - Paid status detected in BILL → updates Payment status in Fluxx
- **Integration Logs:** Errors and sync results are written back to Fluxx for full transparency

## TECHNICAL NOTES

- **Security:** OAuth-secured, logs all activity in Fluxx
- **Supported Fields:** Custom and standard fields for Accounts, Departments, and more

