

C I R C U L U S

Onboarding Tips & Tricks

- Identity Verification is required before entering in your bank account details. This is not a credit check, but rather a security protocol in place with our Soc 1 Type 2 and TrustE certifications in compliance to ensure online data security protection in preventing fraud, and is conducted through Experian.
- Bank Account test transactions will take approximately one business day to be received, so long as the information is correctly entered before 5 PM Central time.
- Payee bank accounts take approximately 2-3 business days to verify after the test transactions are posted to the Payee bank account on file.
- When first setting up your account, please allow for 1-2 additional processing days when executing your first two batches of ACH and Check payments on separate process dates to be delivered to your Payee.
- A daily payment limit of \$50,000 is set. Any total amount of payments exceeding this amount within a single process date will be subject to extra processing days.
- To avoid Sync Conflicts:
 - Make all edits in Circulus after a bill has been added.
 - Delete any bills in Circulus as the deletion of a bill will sync to QuickBooks, deleting the bill in both places.
 - Do not delete bills in Circulus which have been paid through QuickBooks, or outside of Circulus. Please mark these as paid in Circulus and use the “Sync to QB” option when necessary.
 - Add any Vendor Credits in Circulus so that they sync to QuickBooks.

To understand and resolve conflict issues please use the links below:

[Billing Conflicts](#)

[Payment Conflicts](#)

[Expense Conflicts](#)

[Vendor Credit Conflicts](#)

[Vendor Conflicts](#)

[Employee Conflicts](#)

[Customer Conflicts](#)

[General Conflicts](#)