

Hubdoc Client Set-Up and Onboarding

▫ **Step 1: Determine the Optimal Set-up for your Client's Accounts**

Before adding a client's account, read through this [pre-setup checklist](#) to determine the best set-up. Key considerations include:

- Who's Paying for the Account?
- Who's Managing the Account?
- What Banks and Vendors Will Your Client Need?

▫ **Step 2: Create the Client Account**

Once you've determined how to set-up the account, click the 'Add a Client Account' button from your Organization's Page. If this is your first client, you will be directed to enter in your firm's billing information.

Remember, once you add a client, an invitation email will immediately be sent to the email that was used to create the client account. If you used an email alias, you will receive the email. You can then create a placeholder password to be shared with your client.

▫ **Step 3: Grant Access to your Team**

If you have other team members who will be working on the client's account, make sure to [grant them access](#). You can do from the firm's Organization's page by clicking 'Manage Users'.

▫ **Step 4: Set Up the Client's Unique Intake Email**

Every Hubdoc account has a unique intake email address that allows documents to be email-forwarded in to the account. This is helpful in cases where your client receives receipts and/or invoices from their suppliers via email.

1. Click 'Accounts' in the top right corner of your client's account.
2. Navigate to the 'Profile' tab.
3. Under the heading 'Uploading documents via email', click the 'Edit' link.
4. Set the unique intake address to something that will be easy to remember and share. An example could be clientname@app.hubdoc.com
5. Click 'Save' and then, the 'Copy to Clipboard' button.



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6. Paste the unique intake address into the client's onboarding file together with their account information.

▫ **Step 5: Connect Their General Ledger**

Once a cloud accounting platform is integrated to a Hubdoc account, you will be able to publish transactions with the source document attached, allowing for audit-proofed reconciliations. Hubdoc currently supports both Quickbooks Online and Xero.

1. Click 'Accounts' in the top right corner of your client's account.
2. Navigate to the 'Destinations' tab.
3. Beside the relevant accounting software, click 'Connect'.
4. Enter in your credentials - you will be provided with a list of your clients to select which file to connect.
5. Authorize the connection between Hubdoc and QBO/Xero.
6. Once the connection has been made, make sure the 'Publish Tax Data' box is checked off. You can then select a default tax rate and a default tax exempt rate. The tax rate options will be whichever tax codes you have set up in the accounting platform.
 - [Enabling BC Tax Codes in Hubdoc](#)
 - [Saskatchewan Tax Codes in Hubdoc](#)

▫ **Step 6: Add Your Client's Automated Connections**

If you are adding connections on your client's behalf, make sure you have the following information:

Username/Login ID/Account Number - Please use the exact same username that your client would use to login directly on the vendor's website

Password

If applicable, answers to PVQs and/or access to two-factor authentication.

If you do not have their credentials, move on to **Onboarding**. During your onboarding meeting, go through the process of adding your client's automated connections together.



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▫ **Step 7: Set Up Tags for Easy Document Management (Optional)**

Tags are a great organizational tool that go beyond the vendor folders that are created by default. If you would like clients to be able to identify certain pieces of information to you upon submitting a document, you can set up a list of Tags for them to choose from.

We recommend creating this list for them during the account setup process so that you can train them during the onboarding meeting.

Examples of tag applications:

- To identify who is submitting documents
- To identify which credit card was used to pay for a transactions
- To identify which chart of account a particular document belongs in without you having to read the line items

The additional benefit of tags is that you can apply multiple tags so if you'd like to use any combination of the above, that works too!



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▫ Step 8: Client Onboarding

Your client's account is now set up and ready for onboarding. Here are some tips to help you prepare for your onboarding meeting:

1. Clearly communicate the role that Hubdoc will play in your relationship and in your tech stack.

- What is Hubdoc? Why are we using it?
- What documents do you expect them to provide you with? Why are they important?
- Are there other apps you'll be using together? What's the difference?

2. Have all of their account information ready and organized in a way that is easy to share.

- Username (the email used to create the account)
- Password (if you have created a placeholder for them)
- Unique Intake Email - Have them save this as a Contact in their Email as 'Hubdoc' so it's easy for them to pull up

3. Show them how to use Hubdoc.

- Add an automated connection together - If any security questions or two-factor authentication is prompted, set their expectations on [how Hubdoc handles these security features](#).
- Email a test document using their Unique Intake Email
- Download the mobile app and take a sample picture, show them how to Tag - Highlight the [best practices for taking pictures](#)

4. Share Hubdoc's Support details if they ever have any questions or technical issues - we're happy to help!

- support@hubdoc.com
- 800 577 2842 (9AM-6PM Eastern Standard Time)

