

Building a **Paperless Bookkeeping Workflow**

with Hubdoc & Fujitsu ScanSnap

featuring Jennie Moore, Moore Details Inc.



INTRODUCTION

Today's Speakers



Jennie Moore

**Founder & CEO
Moore Details Inc.**

 @mooredetails



Geoffrey Gualano

**Director of Marketing
Hubdoc**

 @Hubdoc



Housekeeping

- **We'll send the recording**
Keep an eye on your inbox!
- **Ask questions in the GoToWebinar Control Panel**
We'll provide answers at the end of the webinar!
- **Close any unnecessary windows/applications**
It will help to enhance your webinar experience!

GIVEAWAY

We're selecting one lucky webinar attendee to win a **Fujitsu ScanSnap iX1500 Scanner!** The winner will be announced at the end of the webinar — stay tuned!



INTRODUCTION

Today, we'll discuss...

- How to introduce and onboard your bookkeeping clients to new hardware
- How to help your paper-based small business clients go paperless
- How to streamline your document workflow and increase bookkeeping efficiency with Hubdoc & Fujitsu ScanSnap



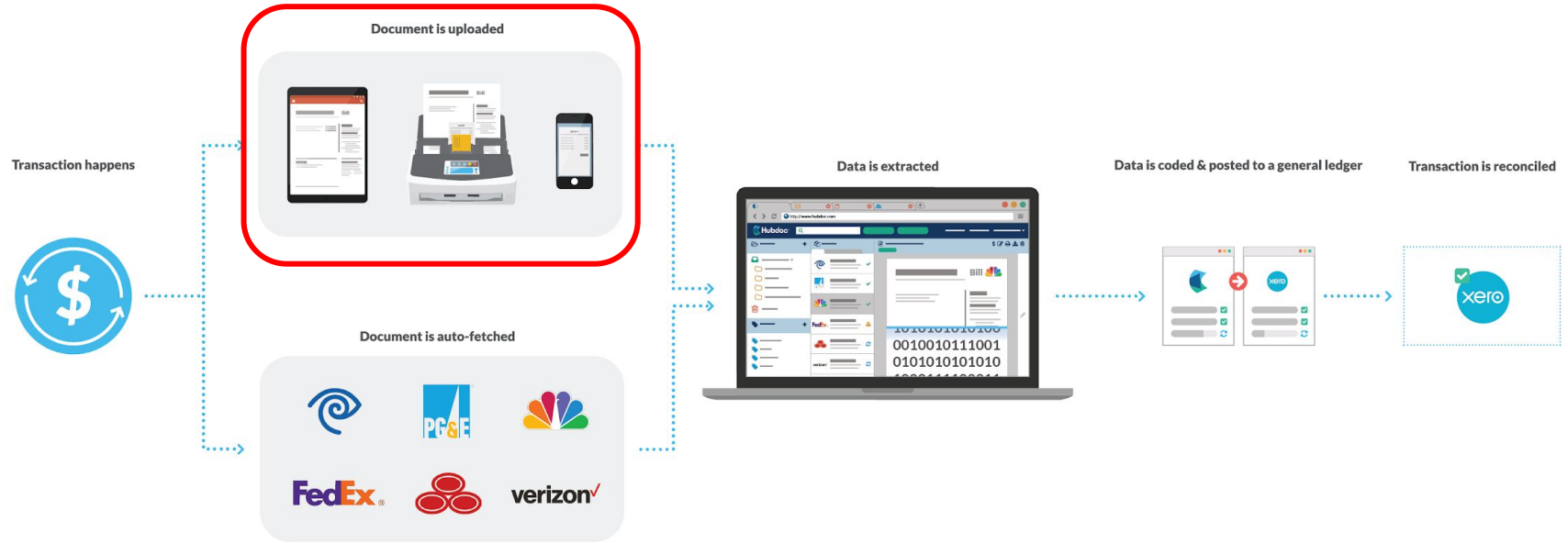
The beginning



Discovering Hubdoc & Fujitsu ScanSnap



Bookkeeping workflow with Hubdoc



Tactical tips for using Hubdoc & Fujitsu ScanSnap



Implementation of Hubdoc & Fujitsu ScanSnap – Jennie's Standard Operating Procedure

1. Create an email alias
2. Connect ScanSnap to Hubdoc – [follow these instructions](#)
3. Select region = North America
4. Confirm that either Windows 10 or Mac is used for the client
5. Download of sscv11i20.exe which is 30.2 MB
6. Allow access for sscsetup.msi to be installed on the client's computer
7. c:/Program Files(x86)\PFU\ScanSnapCloud
8. Create an account & password
9. Provide your client's Hubdoc account login as a reminder
10. Ensure WiFi light is on
11. Insert documents (upside down, facing back)
12. Run a test!

JENNIE'S PRO TIPS:

- ★ Send the client a list of to-dos (similar to the one on the left)
- ★ Remind client to track down their WiFi password!



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Questions?



Jennie Moore
Founder & CEO
Moore Details Inc.

 @mooredetails



Geoffrey Gualano
Director of Marketing
Hubdoc

 @Hubdoc



And the winner is...



Thank you!

