



Paper to Hubdoc

Even with so many online banking and billing options available, let's face it – there will always be some paper documents that you'll have to manage. Fortunately, with Hubdoc, it's easy to digitize your paper bills and receipts and file them in the cloud with the rest of your business documents.

This short guide aims to provide step-by-step instructions for adding your paper documents to Hubdoc.

If you have any additional questions about adding paper to Hubdoc, please **see our Helpdesk** or reach out to our Support Team – we're happy to help!

Best Practices for Uploading Paper Documents to Hubdoc

Step 1

Separate Documents by Type and Vendor

Step 2

Check Automated Connections

Step 3

Upload Documents to Hubdoc

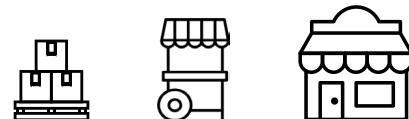
1 Separate Documents by Type and Vendor

Sort your documents prior to uploading. As a best practice, try to upload one (1) document at a time.

1. Type



2. Vendor



We suggest sorting first by document **type** – statements, receipts, invoices, and bills – and then by **vendor**. This is so that you can: a) check for existing vendors that you can add as automated connections (Step 2), and b) use different upload methods depending on the document type (e.g., receipts may be quicker to photograph via the mobile app, and full-page invoices may be quicker to scan).

2 Check Automated Connections

Do you have old bank statements or invoices from major vendors (like telecoms or utilities)? You can search Hubdoc's current list of automated connections through our web application or by reviewing our master list.



FIND AUTOMATED CONNECTIONS

To add an automated connection, log in to Hubdoc and click the green "Add Account" button. For more details on how to add a connection, **read this article in our Helpdesk**.

Can't find the connection you're looking for?

Submit a request for Hubdoc to build the connection! Simply **reach out to Hubdoc's Support Team** with the name of the desired bank, utility, or other vendor/supplier, and include how many of your clients would benefit from the connection. Please note that we prioritize the creation of new connections based on demand.

3 Upload Documents to Hubdoc

As a reminder, we recommend uploading documents one at a time to make the bookkeeping process as seamless as possible.

To upload documents: select your preferred method from the list below (or, use them all!). Take a photo with your mobile phone, email them via your unique intake address, scan them, and/or drag and drop from your computer.



Mobile App – Snap a photo with the Hubdoc mobile app!

Take a photo of your receipt, invoice, or bill with our mobile app. You can download our mobile app in your device's app store.



Email – Do you receive bills and invoices via email?

If yes, forward those straight into Hubdoc! Ask your Hubdoc admin for your unique Hubdoc intake email (it ends in **@app.hubdoc.com**). Simply email your documents using this email address and Hubdoc will do the rest.



Uploading – Are your documents already on your computer?

Use Hubdoc's web application to manually upload your documents. **Log in to your Hubdoc account** via your web browser and click the green "Add Receipt" button. Follow to prompts to upload your documents! More details can be found in **this article**.

Pro tip: For recurring or regularly used vendors, we recommend adding **custom forwarding rules** to your email account so these invoices and bills can be emailed to Hubdoc automatically.



ScanSnap Cloud – Do you have a ScanSnap scanner?

Use Hubdoc's integration with ScanSnap Cloud to automatically send one document at a time into Hubdoc. Hubdoc currently works with the ScanSnap iX500 and iX100 scanners. More details on how to set up this integration can be found **here**.



Mobile Email – Don't have the mobile app but still want to use your device?

No problem – you can use email forwarding! Use your mobile device's camera to take a picture of your document. Attach that image to an email and send to your unique Hubdoc intake email.

Uploading Multi-Page Documents



Uploading multi-page documents without a scanner

There are a number of apps available that will turn your mobile phone camera into a scanner. A simple search of the app store will surface a number of options, such as Genius Scan. (Please note: using these types of tools is merely a suggestion. Hubdoc neither benefits nor is liable for the performance of any third-party apps.)

Once a document is scanned using this app, forward it via your unique Hubdoc intake email or other method listed above.



Splitting PDFs in Hubdoc

While we recommend uploading documents one at a time, Hubdoc **supports the ability to split multi-page PDFs**.

Need Assistance?

Please see our **Helpdesk** or reach out to our Support team – we're happy to help!

North America

Phone Support
800-577-2842

Available Monday - Friday from
9:00am - 6:00pm EST

Email Support
support@hubdoc.com

Available Monday-Friday
from 9:00am - 9:00pm EST;
Saturday-Sunday
from 9:00am-7:00pm EST

United Kingdom

Phone Support
+44 (0)20 3936 4826

Available Monday - Friday from
9:00am - 6:00pm GMT

Email Support
support@hubdoc.co.uk

Available Monday-Friday
from 9:00am - 9:00pm GMT;
Saturday-Sunday
from 9:00am-7:00pm GMT

Australia

Phone Support
+61 8 7444 5026

Available Monday - Friday from
9:00am - 6:00pm AEST

Email Support
support@hubdoc.com.au

Available Monday-Friday
from 9:00am - 9:00pm AEST;
Saturday-Sunday
from 9:00am-7:00pm AEST

Tips for Submitting Support Requests via Email

Reaching out to Hubdoc Support via email? Here are a few questions to answer/pieces of information to provide in your support ticket that will help eliminate the amount of back and forth communication and enable a faster resolution:

- What is the email or company name associated with the Hubdoc account that is experiencing trouble?
- What is the name of the connection that you are having trouble with?
- What are the last 4-digits associated with the account that is experiencing trouble?
- Have you completed the Personal Verification Questions or Two-Factor Authentication step in Hubdoc for this connection recently?
- If you are having trouble in your Hubdoc account and/or with its features, would you be able to provide a screenshot?
- How long have you been experiencing this issue?

