

Hubdoc and Xero Integration



Duration: Half day

TARGET AUDIENCE

This half-day course is intended for people who need to know how to use Hubdoc and the Hubdoc Xero Integration.

LEARNING OUTCOMES

The skills and knowledge covered in this course are sufficient to help you understand how to use Hubdoc for business expenses and integrating business transactions into Xero.

Hubdoc Overview

- What is Hubdoc
- How Hubdoc works
- Using Hubdoc and Xero together

Setting up Hubdoc

- System Requirements
- Creating a new Hubdoc organization
- Connecting to existing Xero organization
- Single Sign on for Hubdoc and Xero
- Updating Settings
- Base Currency settings
- Hubdoc email address
- User Permissions explained
- Invite & manage Users

Connecting to Xero

- About Hubdoc and Xero connection
- Cancel existing connections
- Connect Hubdoc to Xero
- Set default tax rates
- Disconnect Hubdoc and Xero

Uploading documents to Hubdoc

- What you need to know
- Email documents
- Manually upload
- Upload using the mobile app
- Add notes to documents
- Multi-page documents
- Automated connections

About Publishing documents

- About Publishing a document
- Re-publishing a document
- Types of documents
- Multicurrency in Hubdoc
- Document fields explained

Publish documents to Xero

- Manually publish a document
- Automatic publish documents

Find and View transactions in Xero

- Account Transactions
- Transaction source
- Search for a transaction
- Deleting duplicates
- View Hubdoc documents in Xero Bills

Managing Hubdoc Documents

- Check the status of uploads
- Organise documents with tags and folders

Duration: 3 hours

Class size: 6 max

Times: 9.30am to 12.30pm

Where to from here?: Xero Training in a Day, Smarter Xero, Payroll using Xero, Introduction to Xero Projects