

# Introduction to Xero Hubdoc



**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
- Set default tax rates
- User Permissions explained
- Invite & manage Users

### Connecting to Xero

- About Hubdoc and Xero connection
- Cancel existing connections
- Connect Hubdoc to Xero
- 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

### 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

### Find & Manage Hubdoc Documents

- Find a document
- Delete 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