

BUSINESS RESOURCE

Hubdoc Getting Started Guide

A simple, step-by-step guide to setting up Hubdoc so your receipts, bills and statements are captured, organised and ready for your bookkeeping.

A practical Harrian Bookkeeping guide for small businesses across the UK.

How to use this guide

Work through the steps below in order when you first set up Hubdoc. Once it's connected, keep this guide handy as a quick reference for the different ways to get your documents in.

What is Hubdoc?

Hubdoc is a document capture app that lets you photograph, upload or forward your receipts, bills and bank statements, then automatically pulls out the key details (supplier, date, amount) and files everything for your bookkeeping. It connects directly to Xero, so captured documents flow straight through to your accounts without paper piling up or receipts going missing.

Setting Up Hubdoc: Step by Step

1. Access Hubdoc

If you use Xero, Hubdoc is included at no extra cost. Log in to Xero, go to **Business > Hubdoc** (or hubdoc.com) and sign in with your Xero details.

2. Connect your accounting software

Link Hubdoc to your Xero organisation so documents you capture can be published straight to your accounts. This only needs to be done once.

3. Download the mobile app

Install the free Hubdoc app (iOS or Android) so you can photograph receipts on the go, the moment you get them, rather than collecting a pile for later.

4. Set up email forwarding

Hubdoc gives you a unique upload email address. Forward supplier invoices and e-receipts to it directly, or set up a rule in your inbox to forward them automatically.

5. Connect supplier and bank feeds where available

For some suppliers and utility providers, Hubdoc can fetch statements and bills automatically each month, saving you from downloading them yourself.

6. Do a test upload

Photograph or upload one receipt to confirm it appears in your Hubdoc inbox and that the details are picked up correctly before you rely on it day to day.

Ways to Send Documents In

Mobile app: snap a photo of a paper receipt as soon as you get it.

Email forwarding: forward supplier invoices to your Hubdoc email address.

Drag and drop: upload PDFs or images directly at hubdoc.com.

Automatic fetching: connected suppliers deliver statements and bills for you.

Tips for Keeping on Top of It

Capture receipts straight away rather than saving them up — it takes seconds and nothing gets lost or faded. Check your Hubdoc inbox weekly to confirm documents have been read correctly before they publish through. Keep supplier and bank feeds connected so recurring bills come in automatically. If in doubt about a document, upload it anyway; it is far easier to discard something you don't need than to chase down a missing receipt later.

What Happens Next

Once a document is captured, Hubdoc reads the key data and files the original image for your records. From there it can be published to Xero, where it's matched against your bank transactions as part of your regular bookkeeping — keeping your records accurate and your paperwork audit-ready with no filing cabinet required.

Harrian Bookkeeping

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07831 524703 | hello@harrianbookkeeping.com | www.harrianbookkeeping.com