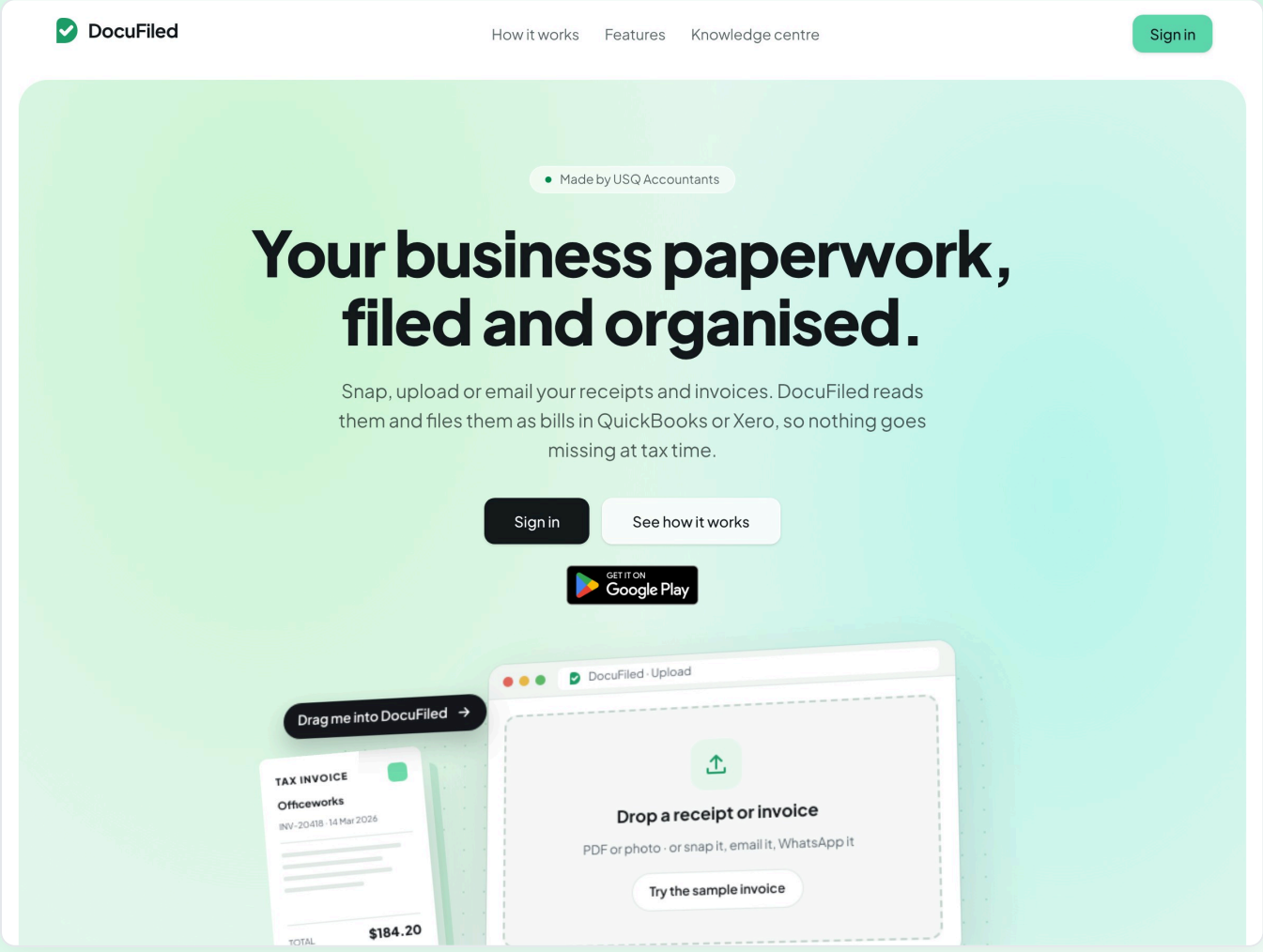
DocuFiled

From your accountants at USQ Accountants

Welcome to DocuFiled

Your new home for receipts and supplier invoices.
DocuFiled replaces Dext for your business.



Snap

Take a photo of a receipt with your phone.

Upload

Drag in a PDF or photo from your computer.

Email

Suppliers email invoices to your own DocuFiled address.

What's changing

We're moving all our clients from Dext to **DocuFiled**, a system built by USQ Accountants. It does the same job as Dext: you send us your receipts and bills, and they're read, checked and filed into your accounting software.

What stays the same

- You still just send us your paperwork. We still do the bookkeeping.
- Every document is read automatically: supplier, invoice number, dates, GST and totals.
- Your past Dext documents have been backed up by us, and recent ones have already been moved across.

What you need to do (about 10 minutes)

#	TASK	PAGE
1	**Accept your invite and sign in.** Look for the email from DocuFiled.	3
2	**Put DocuFiled on your phone** so you can snap receipts on the go.	4
3	**Start sending documents** by snapping, uploading or emailing them.	5
4	**Ask your suppliers to email invoices to your new DocuFiled address** instead of your old Dext address.	5

Please stop using Dext. Don't use the Dext app or your old *...@dext.cc* email address any more. Documents sent there may be missed once Dext is switched off.

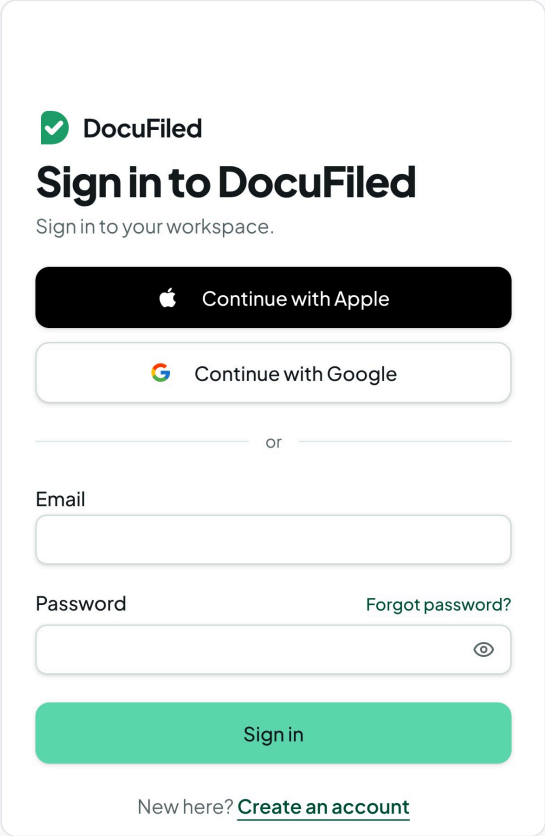
STEP 1

Accept your invite and sign in

We've set up a DocuFiled workspace for your business and sent an invitation to your email address.

1. Open the email from **DocuFiled** and click the link. You can also go straight to **docufiled.com** and tap **Sign in**.
2. Sign in with the **same email address** the invite was sent to. You can use:
   - **Continue with Google** or **Continue with Apple**, or
   - your email address and a password. Tap **Create an account** the first time.
3. Your business workspace opens straight away.

> **Can't find the invite?** Check your junk or spam folder, or contact us and we'll resend it.



The DocuFiled sign-in screen on a phone

Adding your staff

Once you're in, you can invite staff from **Settings & team**. Each person is one of two types:

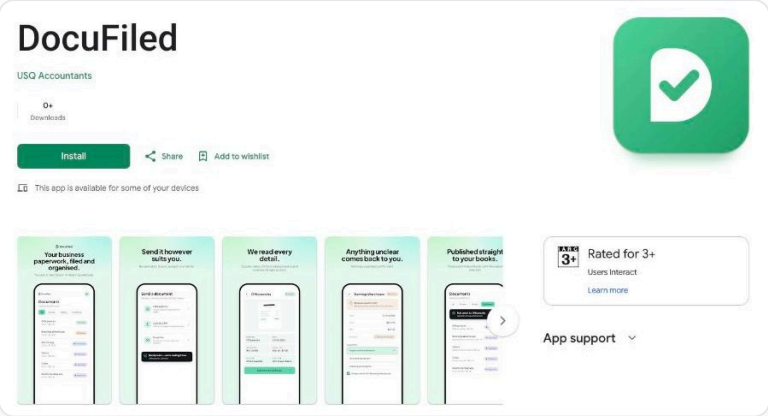
Business Admin: usually the owner or manager. Sees every document and manages suppliers and settings.
Member: staff who buy things for the business. They can send receipts but only see the ones they sent.

STEP 2

Put DocuFiled on your phone

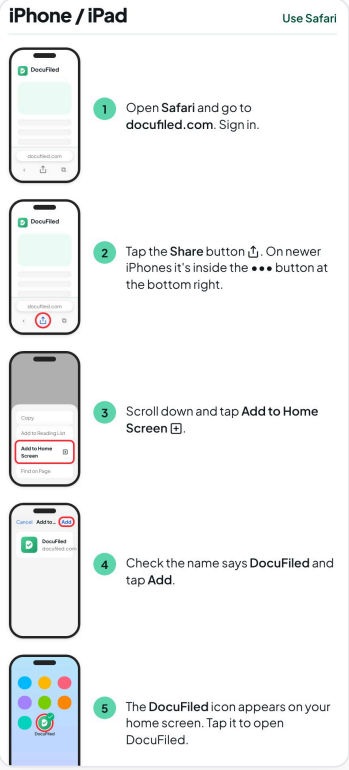
With DocuFiled on your phone, you can photograph a receipt the moment you get it.

Android: install from Google Play



1. Open the **Google Play Store**.
2. Search for **DocuFiled** (by USQ Accountants).
3. Tap **Install**, open it and sign in.

iPhone: add DocuFiled to your home screen



1. Open **Safari** and go to **docufiled.com**. Sign in.
2. Tap the **Share** button. On newer iPhones it's inside the ••• button at the bottom right.
3. Scroll down and tap **Add to Home Screen**.
4. Check that the name says **DocuFiled** and tap **Add**.
5. The DocuFiled icon now sits on your home screen and opens like any other app.

> You stay signed in, so next time it opens straight to your documents. Android users can also use Chrome's menu → **Add to home screen**.

STEP 3

Send us your receipts and invoices

There are three ways to send documents. Use whichever is easiest.



1. Snap a receipt

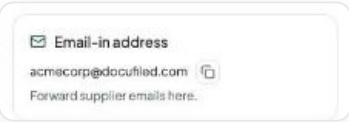
On your phone, open DocuFiled and tap **Snap**. Lay the receipt flat in good light and fill the frame. That's it. You can also pick photos you've already taken from your photo library.

2. Upload from your computer



Drag PDFs, JPGs or PNGs onto the **Drop receipts and invoices here** box, or click it to choose files. You can add several at once.

3. Email: your own DocuFiled address



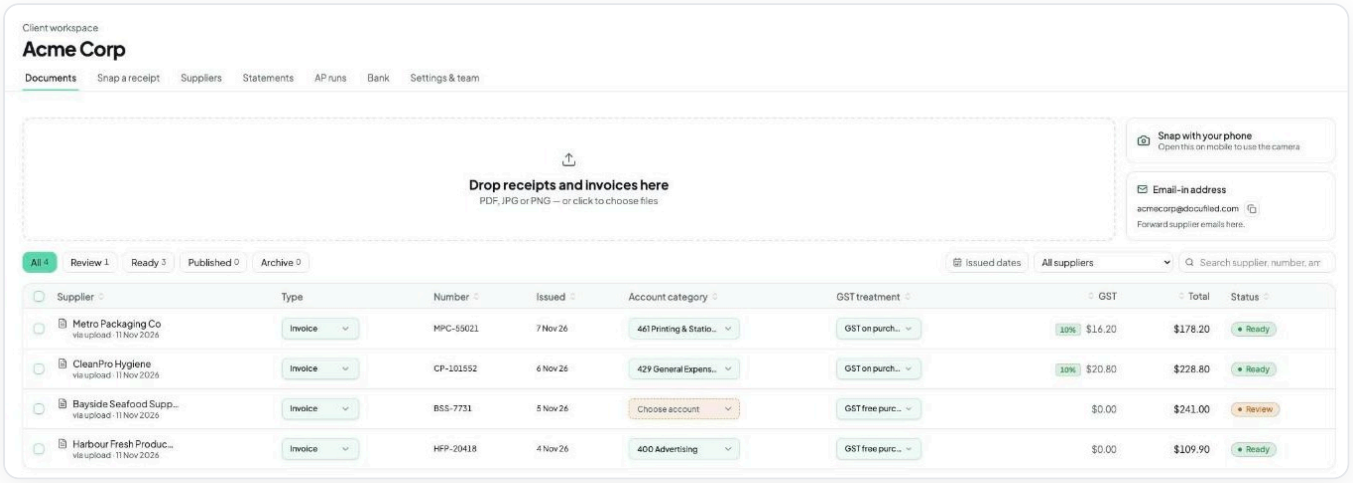
Your business has its own email address, such as **yourbusiness@docufiled.com**. You'll find it on your Documents page and can copy it from there. Forward any invoice email to it, PDF attachments included.

STEP 4

Tell your suppliers. Ask every supplier that emails invoices to your old Dext address (...@dext.cc) to change it to your new DocuFiled address. If a supplier uses an ordering platform such as Fresho, Square or MYOB, the address needs updating in that platform too.

What happens next

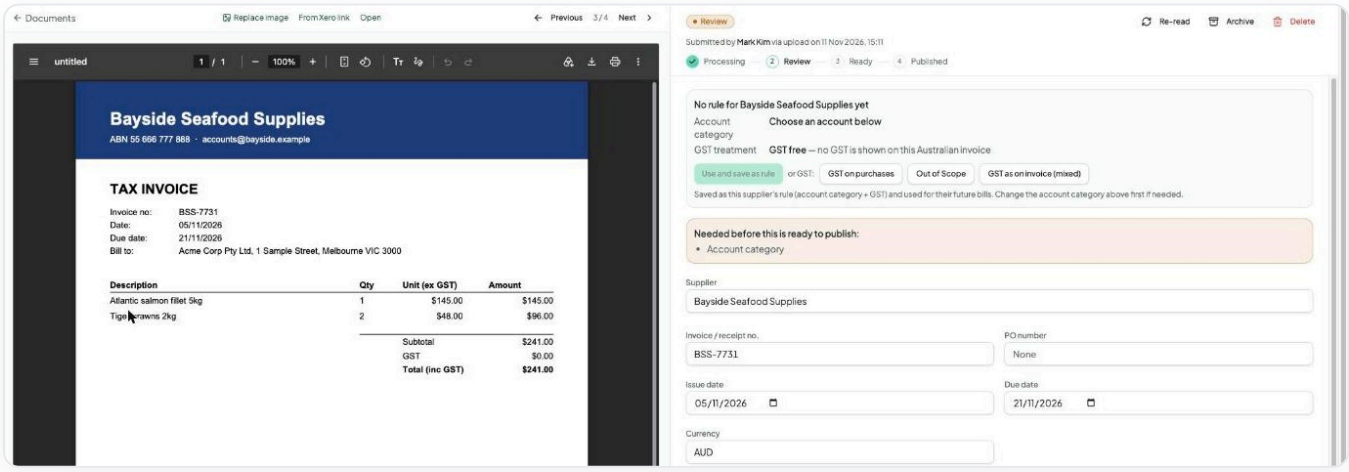
Each document is read within moments and appears on your **Documents** page. The example below uses a sample business, Acme Corp.



Sample documents in the Acme Corp demo workspace

STATUS	WHAT IT MEANS
Review	Something needs checking, for example the expense category for a new supplier. We'll handle it, or ask you if we need to.
Ready	Read and checked, waiting to go into your books.
Published	Filed as a bill in your accounting software, with the original document attached.

Opening a document



Click any document to see the original next to the details DocuFiled has read.

Tips and help

Send it as soon as you get it

Snap receipts on the day. Faded thermal receipts are hard to read later.

One document per photo

Take a separate photo for each receipt. A PDF with several invoices in it is fine; DocuFiled splits it.

Supplier statements welcome

Send monthly statements too. We check them against your bills so nothing is missed.

Not sure? Send it anyway

Anything that isn't a bill, such as order confirmations or newsletters, is set aside automatically.

Common questions

What happens to my Dext documents?	We've backed up your full Dext history and moved recent unprocessed documents into DocuFiled for you.
Does it cost anything?	There is no charge for your business at this stage. DocuFiled is provided by USQ Accountants.
Who can see my documents?	Your Business Admins and the USQ Accountants team. Members only see the documents they sent themselves.
More guides	Visit **docufiled.com/knowledge-centre**.

Need a hand? We're here to help.

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