



Quick Start Guide






What is Hubdoc?

It is one place to manage all of your bills, statements and important documents – available anytime, on any device. From utility bills to tax receipts, Hubdoc can handle it all!

We hope to eliminate the delivery of paper bills and eventually replace your filing cabinet. No more clutter, late fees or passwords to remember!

We want it to be as simple to review and pay a bill as it is to buy a book on Amazon.

What does Hubdoc do for me?

-  **Get organized** No more late fees.
-  **Stop paper filing** Access any document anytime from any device.
-  **Go Green** Reducing your clutter helps the environment.

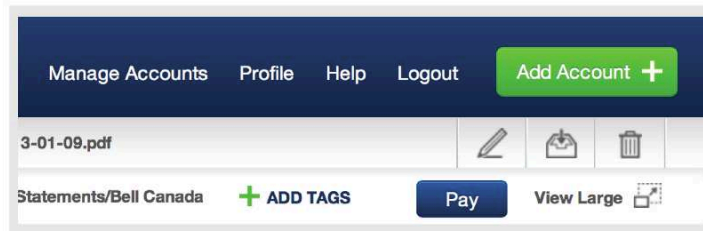
How do I add documents to Hubdoc?

There are three ways to do so:

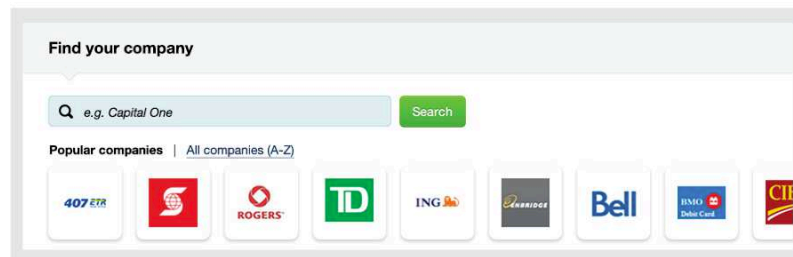
1 OPTION

Set up accounts for automatic fetch. Provide your logins to key accounts and we will automatically fetch your bills and statements when they are ready.

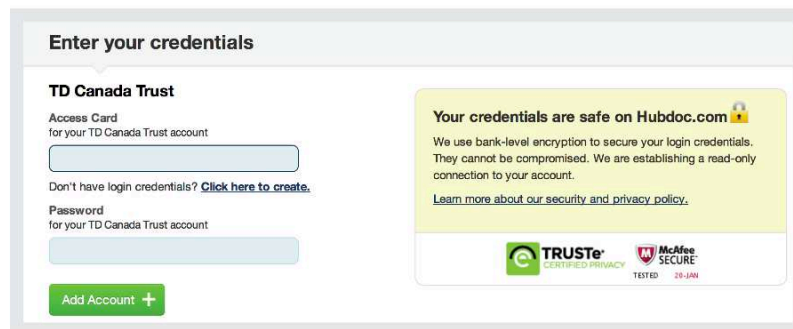
a. Click the **Add Account** button in the top right corner of the screen.



b. **Find your company** by either searching or browsing the directory of companies that we currently support.



c. **Enter your credentials** for the account and let Hubdoc do the rest. We will automatically fetch new documents, bills or statements for this account and we'll alert you when they arrive and when bills are due.



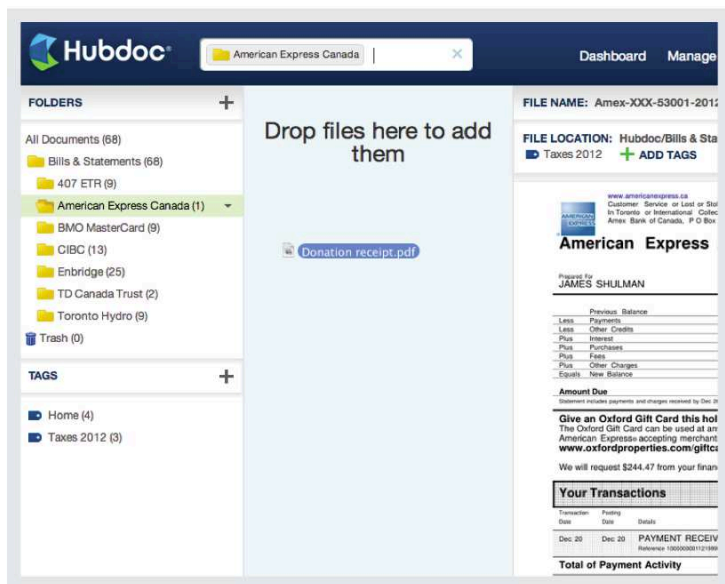
2
OPTION

Email your docs to us. Simply send an email with your doc attached to file@hubdoc.com from the email address that you used to register your account.

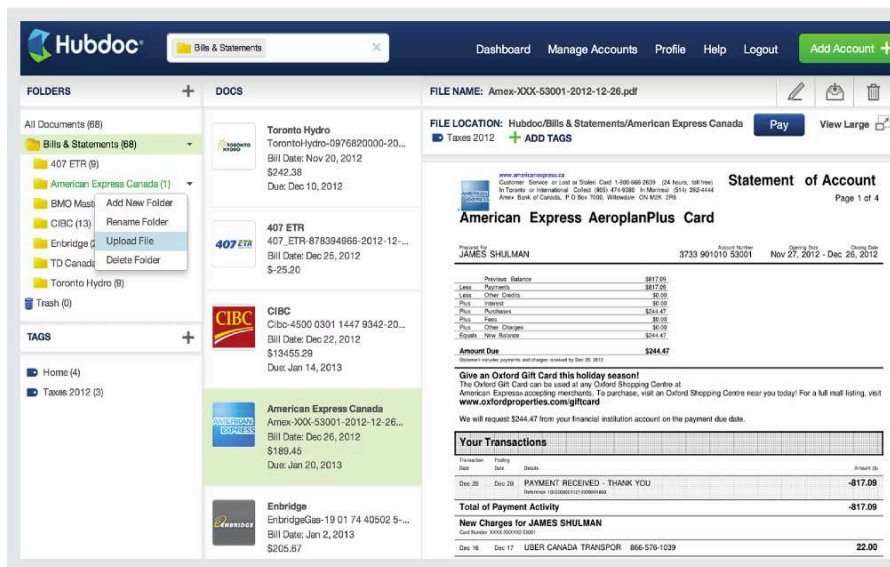
3
OPTION

Upload it directly to our site

a. **Drag & drop a file** from your desktop on to the folder where you want to store it, or



b. **Select the folder** where you want the document and select “Upload” from the dropdown menu.



Creating Folders

We automatically create folders for you under the folder name “Bills & Statements” for any company that you set up (share credentials) with us. For instance, if you set up your American Express account, we put all your American Express docs in “Hubdoc\Bills & Statements\American Express”.

To set up your own folders, simply hit the big “+” sign to right of the heading FOLDERS and a new folder will be created for you.

What are tags?

A tag is a word assigned to any one of your docs; they help you organize your docs into categories - like Home, Taxes or Credit Card. The benefit of using tags is that you can easily find all of your docs associated with a particular tag, just like folders, except that you can add as many tags as you want to a doc.

Adding a Tag

There are two ways to create a tag in Hubdoc:

1. **Click the big “+” sign** beside the heading TAGS in the left column of your Hubdoc screen, or
2. **Click the “+” ADD TAGS button** in the Doc Detail area (rightmost column of your Hubdoc screen).

FREQUENTLY ASKED QUESTIONS

What if I want to add an account that is not available? How do I request a new provider?

We are adding accounts every day, all of it driven by user feedback. Email us at support@hubdoc.com to request a new company or account to be added.

What types of accounts does Hubdoc support?

We currently support banks, utilities, telecoms and are focused on adding every account or company that sends you mail regularly.

Once I connect with a company at Hubdoc, will I still also receive my bills directly from that company?

Yes. You will still receive direct communication from the companies who bill and mail you regularly.

How do I close and delete my account?

Go to the Profile page of the Hubdoc website and select "Delete Your Account." Make sure to download all of your data before doing so because when you select this option, Hubdoc deletes all of your docs.

DATA

How secure are my documents?

At Hubdoc, we take the utmost care to ensure your data is secure. Your documents are always delivered over a secure connection using 256bit SSL. This is the same security your banks use to protect your transactions.

Can I get an electronic copy of my docs if I close my account?

Before deleting your account, go to Hubdoc and select the docs you want to save to your hard drive and select "Download".

Will Hubdoc ever share or sell my information?

No. Your data and docs are your docs. We will never share or sell your information.

SUPPORT

Whom do I contact when I am having issues with my account?

Either fill in the support form at <http://www.hubdoc.com/help.html> and we will respond to you, or you can email us at support@hubdoc.com

