



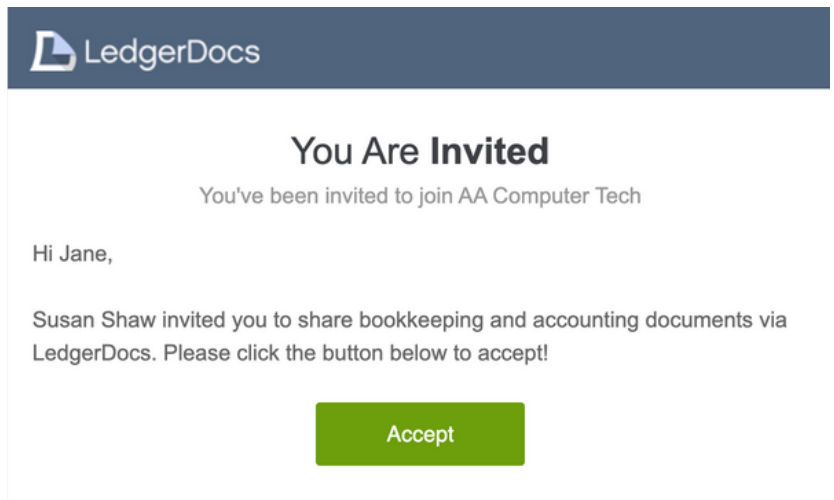
LedgerDocs Client Onboarding Guide

Welcome to LedgerDocs, your partner in efficient financial document management. To help you get started, here's a quick onboarding guide:

1

Set Up Your Account

To set up your account, check your email inbox for a message from LedgerDocs containing an invitation link. Click on the "accept" button, fill out the form on the new page with your information, and complete the registration. Once done, follow the link to log in and start exploring LedgerDocs. With your account successfully set up, you can now access company files by navigating to your company folder.



2

Take the App Tour

Once you receive the invitation and create your LedgerDocs account, click on "Take Tour Around The App" after logging in. This tour provides valuable pointers about using LedgerDocs effectively. It's a great starting point for new users.



3

Start Uploading Documents

Once your account is set up you can begin uploading documents onto LedgerDocs. We have created a helpful video to get you started: [How to Upload Documents to LedgerDocs](#).

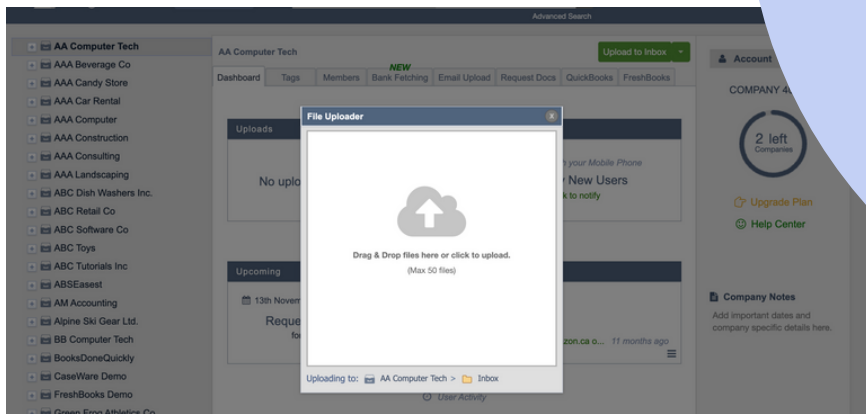


Start Uploading Files

With your LedgerDocs account ready, you can begin uploading your documents.

A. Uploading Files from Your Computer:

- [Log in to LedgerDocs.](#)
- Navigate to your company.
- Look for the green "Upload to Inbox" button. Click it to open the "File Uploader" popup.
- You can either drag & drop files from your computer into the box or click in the middle of the box to select files from your computer. Multiple files can be uploaded simultaneously.



B. Uploading Files via Email

1. Click on Company Name > Email Upload tab, and verify if an email address is assigned to your company. If not, contact your company owner to request one.
2. Send an email to the found address with an attachment (PDF, JPEG, Word, Excel) in the 'To' or 'Cc' field. The subject and body text will be saved as a note with the attached documents and be searchable.
3. You'll receive an email confirmation when LedgerDocs receives the files.

Status	Email Address	Actions
Enabled	aacomp@app.ledgerdocs.com	Cancel

Turn off Email Confirmations for Uploads

Create or change a company email address by using the field below. This address can be used for sending up to 15 attachments per email with a total of up to 20MB.

Emails and any attachments will go directly into your Company Inbox. The subject line will also be captured.

Need help with this feature? View our [Help Center](#).

Email Address @app.ledgerdocs.com

C. Uploading Files from Your Phone

Our mobile app is the quickest and easiest way to scan and upload documents, especially receipts. Download it for iOS or Android and log in using your account information. You can capture new pictures of documents you want to upload or select images already on your phone for upload.



D. Uploading Files with a Scanner

You can automatically upload documents to LedgerDocs via your Fujitsu ScanSnap scanner or Canon scanner. [More details can be found here.](#)







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Add Notes to A Company

Easily add a note to a "Company" by selecting the project on the left side of the screen. Once on the Company Overview screen with account details, locate "Company Notes" on the right side. Click "edit," type your notes, and finalize by clicking "save." Simple as that!

 **Notes**

What is pinning?

Add Note 

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Customize Your Settings

Customize your LedgerDocs experience to suit the unique way that you work. Choose PDF extraction preferences and personalize daily notifications, and make LedgerDocs work for you. We have created a helpful article to get you started:

- [Customizing Your LedgerDocs Account Settings and Preferences](#)



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Contact Us

Do you have any additional questions or require assistance? Don't hesitate to contact us at support@ledgerdocs.com. Our dedicated customer support team is here to assist you.

