



Welcome to AutoEntry!

Here's a checklist to help you get started with AutoEntry.

Eliminate manual data entry and become more productive with AutoEntry. Here are some steps to help you get started and make the most out of the software.

1 Sign up for a free trial

- Our **free trial** lasts one month and includes 25 free credits. Credits are used as follows:
 - 1 credit per invoice/bill/receipt
 - 2 credits per invoice with line item extraction (optional)
 - 3 credits per statement page
- If you want to buy more credits or to carry on using AutoEntry after your free trial, you can sign up to buy a package by clicking the drop down menu on the top right of the screen and selecting 'Account Settings.'

2 Automate data entry into QuickBooks

- On the home page for that company, click '+Upload' to **upload your files**.
- Select the files to be uploaded and when processed, click on the inbox to view the list of invoices.
- Single invoices, for example, can be viewed clicking on the blue 'eye' icon to the left.
- Set the **Supplier account, Category and Tax Code** where required for the invoice (all 3 must be selected).
- Click the green tick to the left to publish the invoice to your accounts package.
- The invoice will now publish straight through to the relevant supplier account within QuickBooks.

3 Attend our weekly webinars for more tips and tricks

- Come join us for one of our live webinars! We're here every week with sessions across multiple time zones.
- Choose from our 20 min Quick Start guide or the more in depth 45 min Full Feature Webinar.
- All our webinars include a Q&A session at the end if you have any specific questions or queries.

4 Join the AutoEntry Partner Program

- By signing up to the **AutoEntry Partner Program**, you'll be joining a thriving community of accountants, bookkeepers, pro advisors and consultants working smarter through digital innovation.
- You'll be able to help your clients become more productive while benefiting from the generous incentives offered by the plan. This includes discounts to the clients you sign up and revenue based on how much clients leverage AutoEntry.

HAVE A QUESTION?

If you have any questions, you can message us directly via our in-chat app or email us on support@autoentry.com