



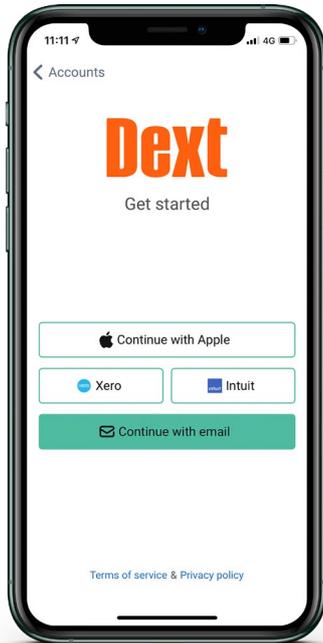
# Dext

# Business finances made easy

Always know what you're spending.  
Never pay more than you should. Give  
your accountant or bookkeeper the  
power to help your business.

**Dext** | **Prepare**  
with Receipt Bank

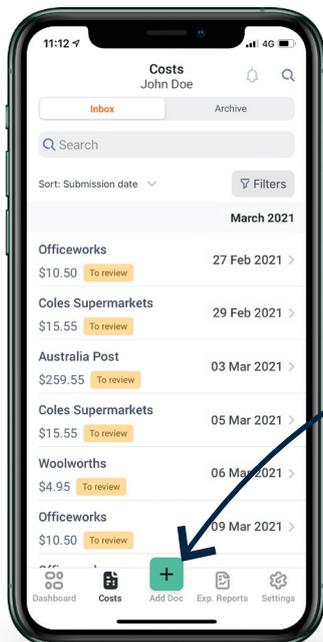
Here's everything you need to know about Dext Prepare  
- your go-to platform for getting on top of business  
finances. All the tools you need to capture, upload and  
track your cash flow - all in one place.



If your accountant or bookkeeper sent you an email with your credentials, you can now download the Dext Mobile App for free in Google Play and App Store.

- 1 Search "Dext"
- 2 Install the Mobile App and open it
- 3 Click 'Continue with email' and Use the email address and password you received in the "Welcome to Dext" email from your accountant or bookkeeper
- 4 Now you can submit paperwork, track and make payments on time and with ease, wherever you are – meaning you'll never miss an invoice or due date again

If your accountant or bookkeeper sent you an SMS invite to download Dext, follow the link to install the app - your credentials will be auto-populated and you'll just need to type in a new password.



The Dext Mobile App is the quickest way to regularly submit your receipts, invoices, and expenses on the go. With one simple tap, the app intelligently analyses, understands and organises the data for you - no more paper, no more manual data entry.

Simply touch the "Add Doc" button at the bottom of the screen to start collecting and categorising your receipts and invoices.

After capturing the image of your receipt, you can add some contextual information to be included with your item before submission. This includes things like adding a category, project, description, or tracking code. Some fields cannot be edited before the upload has finished processing as they are automatically extracted

Once you receive an expense document:

- 1 Head to the app
- 2 Take a photo
- 3 Review
- 4 Then hit "Submit"

Your document is now on its way to your accountant or bookkeeper.

All items you've submitted are visible in your mobile app's Inbox until your accountant/bookkeeper has processed them.



There are three different camera modes on the Dext Mobile App. This means you can capture single, multiple, or multi-page documents easily - great for receipts and invoices of all lengths and sizes.

The three camera modes available are:

- 1 Single Mode**  
 Take a picture and submit a single document
- 2 Multiple Mode**  
 Each picture will be uploaded as a separate document
- 3 Combine Mode**  
 Take multiple pictures to capture one document that spreads over 2 - 30 page.

Currently, Multi Mode and Combine Mode have a maximum of 30 pictures per capture. In addition, you can upload images from your Camera Roll by pressing the image icon in the bottom-left of the screen when in Single mode.



## Dext email-in address

Email-in is the easiest way to submit digital documents to Dext Prepare. Whenever you send a receipt or invoice to your Email-in address, it will automatically be extracted and added to the Costs Inbox.

Receipts, Invoices or other documents can be either: contained in the body of the email or attached.

In either of these cases, Dext Prepare will detect the document, extract it and present it in the costs Inbox. Please note that hyperlinks to items in the body of the email are unable to be extracted.

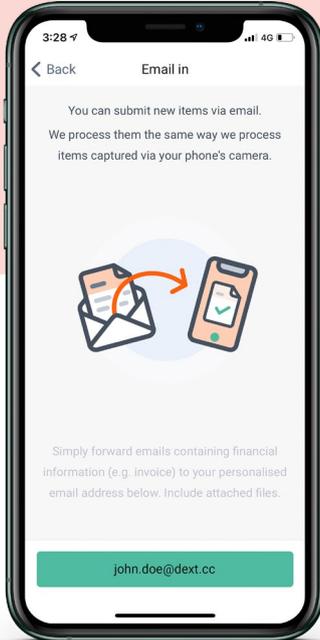
### Email-in ▼

You can customize your unique Dext email address below

Emailing your items to this email address from any other email address will deliver your items to this account under your name. If you regularly receive receipts or invoices from suppliers through email, consider setting these emails to automatically forward to Dext Prepare. This will save you from having to process the document at all.

Email-in address

@dext.cc



**Note:** Every Dext Prepare user will have a new @dext.cc address that is identical to their Receipt Bank one (i.e. if your address was business@receiptbank.me it will now be business@dext.cc) but Dext Prepare will support your existing address for the next couple of years, and we will give you plenty of notice when we stop doing so. Changing one email-in address will automatically update the other.

How to save your Dext Email-in address as a contact on your device:

- 1 Open your Dext mobile app
- 2 Go to settings and select "Email in"
- 3 Tap on email-in address the copy it
- 4 Add it to your contacts, or paste into a new email



## How to save valuable time

### When to use the email-in address

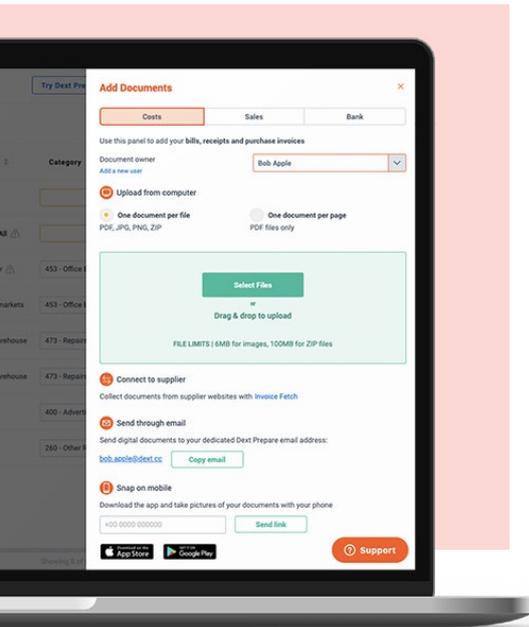
- for supplier invoices received over email

### Where to find your unique email-in address

- On your mobile in the Dext mobile app:
- On iOS - tap settings in the bottom right, then the "Email In" option
- On Android - "Settings" in the lower right, then "Services" from the tabs on top

### How to use

- Forward any email containing your paperwork to your personal '@dext.cc' address
- Forward any email with your paperwork attached to your personal '@dext.cc' address
- If you regularly receive receipts or invoices from suppliers through email, consider setting these emails to automatically forward to Dext Prepare.
- If you have multiple files which describe separate financial transactions, use the email address that you use to log in to Dext Prepare to forward your documents to multiple@dext.cc. These will be separated and added to your inbox

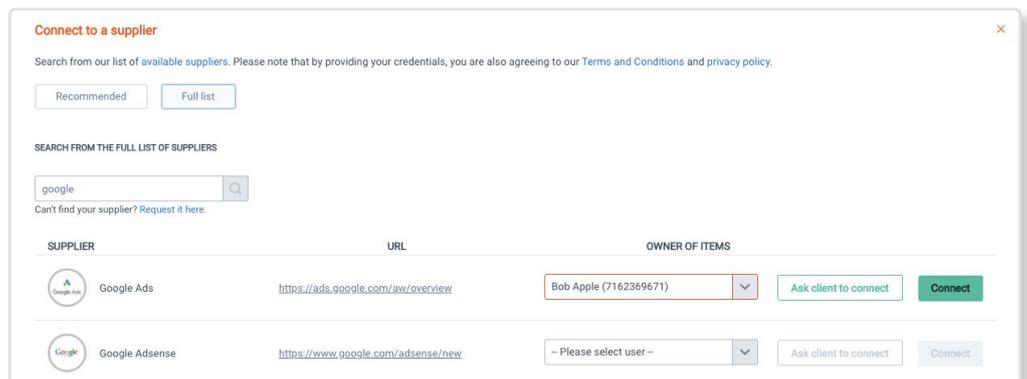
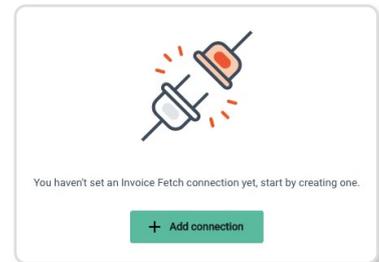


Use Fetch to automatically collect your bills and invoices from supplier websites.

This means that you don't have to spend any more time logging into websites, finding documents and downloading them. Instead, Dext Prepare will automatically check each of your authorised suppliers once a week and add any new documentation straight to the inbox. You don't have to worry about missing paperwork and hours spent searching through files. With Fetch, you save time and give your accountant everything they need to help your business.

## How to set up Fetch

- 1 Log in to the Dext Prepare web application ([app.dext.com/login](http://app.dext.com/login))
- 2 Click **Connections** in the sidebar menu and select either **Costs** or **Bank** or tap **Add Documents** at the top of any screen in Dext Prepare
- 3 Click **Add Connection** then select one of the suppliers recommended by Dext Prepare, or
- 4 Click Full List and use the search bar to locate suppliers and banks to connect to Fetch



- 5 Use the login details for the supplier portal to authenticate the connection
- 6 Select whether to import all historical documents hosted on the supplier portal, or the date range that you select
- 7 Click **Connect** to start the connection process
- 8 A popup will ask you to keep the tab of your browser open while Dext Prepare completes the connection. You can continue to use the Web App in another browser tab while this takes place.

- 9 If Two-Factor Authentication (2FA) is required, another popup will prompt you for the additional information. This is usually an SMS or email message with a one-use code. Enter this and click Send
- 10 Once successful, you will return to the Connections page with the status 'Login Successful.' Use this screen to edit any of the details associated with a connection, or delete it.
- 11 Your accountant or bookkeeper may also set this up for you. If they do, you'll receive an email from Dext taking you straight to Dext Prepare where you can enter your login details for your supplier.

After the initial set up, Fetch will collect any documents already present in the supplier portal and post them to the client's inbox within 48 hours. Following that, Dext Prepare will check for and download any new documentation from the portal on a weekly basis.



**Note:** In the event of your Fetch connection being disrupted (e.g. if you change your password or set up 2-factor authorisation), you will receive an email and a warning message displayed in the 'Connected Suppliers' page with instructions on how to resolve the issue.

## Ready to grow your business?

The essential accounting platform for preparing your business finances. From one-click upload, to easy expense reports, sales invoices and bank statement extraction, Dext helps you transform your admin tasks from painful to pain-free.