



banqup
by unifiedpost

**Get started
with Banqup
in 3 minutes!**



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Be sure to install the
Banqup app as well



or



1 Go digital in managing all of your documents and sending them to your accountant

Set up your account

Start by choosing your settings. Carry out the following configuration on your computer:

Choose whether to receive an email if an action is required.

Go to your **Settings > Reporting >** Make sure that your email address is entered correctly and choose how frequent you would like to receive your reports. And then save.

The screenshot shows the 'Reporting' settings page. At the top, there is a 'Save' button. Below it, the 'STANDARD REPORTING' section contains a text box with instructions: 'Choose a frequency and the email address where you'll get notifications on your account's current open tasks (like payment approval or sepa-files ready for download)'. There are two input fields: 'Frequency' set to 'Daily' and 'Email' set to 'name.lastname@mail.com'. The 'ERROR REPORTING' section below it has a text box: 'This email notifies about errors encountered in processing outbound documents of the previous day.' It also has two input fields: 'Frequency' set to 'Daily' and 'Email' set to 'name.lastname@mail.com'.

Automatically accept purchase invoices imported by you

Go to your **Settings > Purchase invoices > Click on Accept**, set the 3 options on the right-hand side to ON and add your e-mail address, as shown below. Don't forget to save.

Note: you are required to manually accept any documents you have not imported yourself

The screenshot shows the 'Accept' settings page. At the top, there is a title 'Accept' and a subtitle: 'All documents that come into your account must be accepted before any other task is started. This allows you to filter unwanted or unsolicited documents from your organisation'. Below this, there are three radio button options under 'Accept inbound document': 'Manual' (selected), 'Trusted', and 'Automatic'. To the right of these options are three toggle switches, all of which are turned ON. The first toggle is labeled 'Check for duplicate documents', the second 'Block archiving of duplicates', and the third '(Recommended) Automatically accept documents coming from these email addresses:'. Below the toggles is a text input field containing the email address 'naam.voornaam@mail.com'.

Sending documents to your accountant

Once purchase invoices are accepted, and once sales invoices are sent or archived, **your documents will automatically be sent to your accountant.**

Import (or receive) all your invoices on Banqup

There are various options available to choose how you would like to receive you invoices in your Banqup account.

Scan your invoices with the mobile app

- Lay your document on a dark surface
- Click on the button '+' and wait until the app automatically takes the photo (a green frame appears once the document is detected)
- Then, choose the kind of document it is and, hey presto, your invoice is in your account!

Drag your documents to your account

In Banqup, open the page that matches the type of documents you wish to import (**purchase invoices, sales invoices, Doc Center** for other documents), select the documents you wish to import from your computer, drag them to the Banqup window and just drop them anywhere on the page.

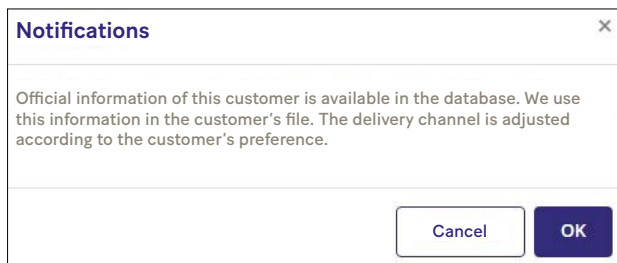
Mail your purchase invoices to the e-mail address dedicated to import

Every Banqup account is given an e-mail address dedicated to imports.


Every annexe (in PDF, JPG, PNG or XML format) sent/transferred to this e-mail address is automatically imported into your account.

Invoices sent by other Banqup users

When two companies use Banqup, they can send their invoices directly to each other's account. When adding a customer (or supplier) with a Banqup account, you will receive the following message:



Companies who are members of the platform are identified in the customer or supplier list with the following logo:

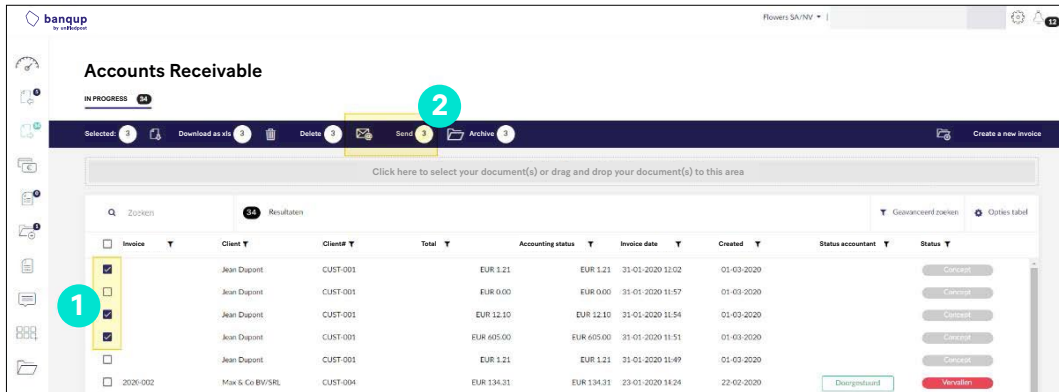
<input type="checkbox"/>	Company	CUST-002	Baaiik	VAT-BE0201811200	BE98311314021090		Edit
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Send your invoices to your customers

Purchases are automatically archived (provided you have activated the options for automatic acceptance, see earlier). Unless in the exceptions described below.

Sales can be archived in two ways:

1. Select your invoices and click **Send**
2. Select your invoices and click **Archive**
(this allows you to archive without sending the invoices to the customer).



Important note:

All invoices that you import into your account pass through an optical character recognition service (OCR). This means that your PDF invoices are converted into so-called 'enriched' invoices. It is then easier to find invoices thanks to the ability to search for any information within your invoice.

In any exceptional cases where this service is unable to recognise the details on certain invoices, you are required to intervene and manually complete them and then accept the document (even if you have selected automatic acceptance).

Once your Banqup account has been linked to your accountant, remember that all archived documents will be automatically sent to your accountant.

Access your archived documents anytime, anywhere

If you wish to find an archived document, simply click on **"Archive"** in the menu on the left-hand side.



Archive

No computer handy? Use our app for iOS or Android

2 Manage your administration with Banqup

Ready to get started? Discover all the features with Banqup.

Keep an eye on overdue invoices

Your Banqup dashboard gives you a summary of all of your invoices. From the number of invoices in your account, to their status, to their amount.

Amounts to be paid			Amounts to be received	
Invoices	Total		Total	Invoices
6	€ 15,861.29	Overdue	€ 59,128.71	22
7	€ 10,382.47	< 30 days	€ 268.62	2
1	€ 13.21	30-60 days	€ 544.50	1
1	€ 2,783.00	60-90 days	€ 0.00	0
1	€ 3,630.00	> 90 days	€ 0.00	0
15	€ 32,656.76	TOTAL	€ 59,941.89	25

Click on the number of invoices or on the total sum to show the invoices in this status.

Invoice your customers in under a minute with Banqup's invoicing tool

- Go to your **Sales invoices** and click on **Make a new invoice**
- Then create all of the necessary fields in your invoice



Pay multiple invoices from different suppliers in a single transaction

(available soon, we will inform you once this function has launched)

Gather your customers' payments

(available soon, we will inform you once this function has launched)

Still have questions?

help@banqup.co.uk
support@banqup.co.uk
We're happy to help!

Be sure to install the Banqup app



or



www.banqup.com