Dext
By IRIS

Getting started **with Dext**

Follow these simple steps to streamline your business bookkeeping and expense tracking — all in one place.

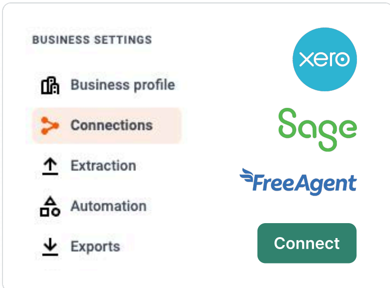
Step 1

Connect to your accounting software

Dext syncs seamlessly with your accounting software.
Once connected, the two systems will share your chart of accounts, and all documents will be published in a format that matches your existing financial records.

To connect your accounting software:

1. Go to **Business Settings** and select **Connections**
2. In the Accounting Software section click **Connect**
3. Click the **Connect** button for your accounting software
4. Follow the on-screen instructions to complete the connection



Step 2

Download the Dext App

Dext offers both a web application and a mobile application. As an admin user, you'll likely find the web app easier to use, but the mobile app is great for snapping photos of receipts and invoices on the go. If your employees only use Dext to submit expenses, the mobile app is all they'll need.

If you haven't already, download the mobile app here:

Download on App Store

Download on Google Play

Need support? Either use the live support chat box within the web application or email support@dext.com

Step 3

Submit documents

You can submit documents to Dext in several different ways.

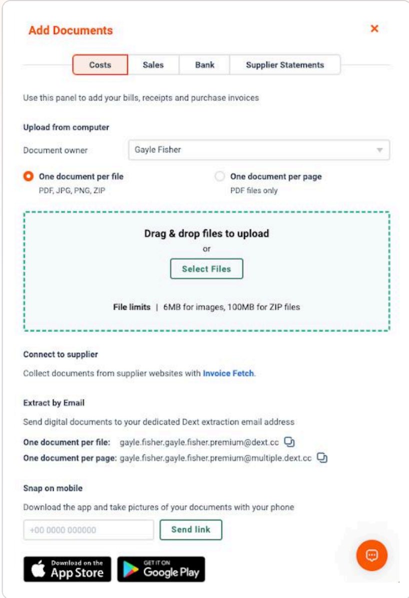
- Snap a picture of your receipt or invoice via the mobile app, great for when you're out and about
- Upload a document from your computer
- Email a document to Dext using your unique Dext email address
- Connect to a supplier website and automatically pull through your invoices using invoice fetch

You can start submitting your items by:

Logging into the web app

Clicking Add Documents

Selecting one of the upload options available



Learn more

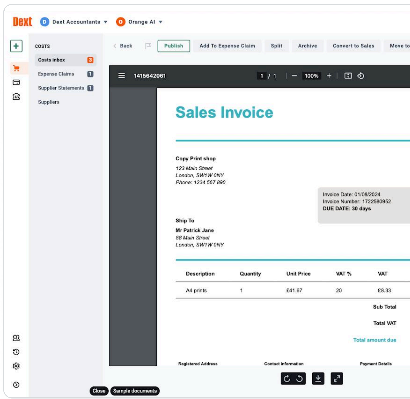
Take a look at the following articles for more details on direct uploads, emailing documents and using the mobile app.

Step 4

Publish your documents

Once you've submitted your documents to your account, you're ready to send them to your accounting software, here's how:

1. Click on the item in your inbox
2. Choose where in your accounting software it will be sent to using the Publish to field in the item detail page
3. Click the Publish button to publish it to your accounting software



All documents will still be visible in Dext within the Archive section.

Top Tip! Set up Auto-Publishing for specific suppliers so you don't have to publish these manually

Take a look at this **article** to find out how.

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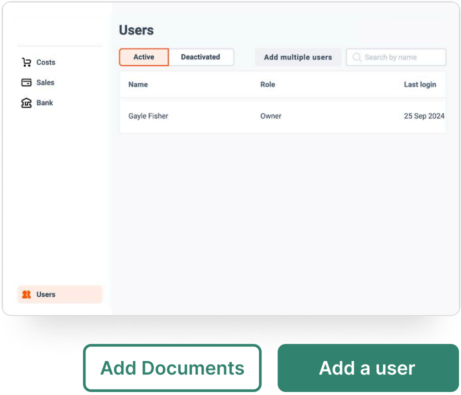
Step 5

Add team members

Invite your team members to use Dext. You will likely have different types of users: those who you want to be admin users, and employees who will only use Dext to submit their expenses. You will be able to assign different user privileges based on the type of user.

To add team members:

1. Click Users on the sidebar menu
2. Click the **Add a user** button
3. Enter the details for the person you want to invite
4. Confirm the user role and edit their access levels (see below for the different types of roles)
5. Choose whether to send an invitation to the new user via email or text message
6. Complete the process by clicking on the Add user button in green



Different types of roles in Dext

You can assign one of three roles to each member of your team, giving you the flexibility to determine who has access to what and tailor permissions, to ensure users only see the information relevant to them.

Business admins: Users have full access to the Dext account, including subscription management.

User admins: Can manage all financial data at the business level but cannot access Dext subscription details, add, suspend, or remove business admins.

Standard users: Can view their own submitted items and cannot change financial data. However, you can grant them additional permissions, such as creating expense claims and publishing to accounting software.