



Docs2me for Xero

Version 1.12

Table of Contents

Contents

App Description	3
App Configuration	4
Instructions Guide	6
Login Page	6
Access Verification Page	7
Home Page/Scan Page	8
Scan Output Settings.....	9
Scan Progress Screen	10
Option to Print from Xero	11
Print Preview.....	12
Print Output Settings	13
Logging Out	14

App Description



Docs2me for Xero

The docs2me for Xero app enables direct scanning from any HP printer with a future smart panel to Xero, which is very useful for bookkeepers and accountants using the cloud-based accounting software platform.


Scan documents to your Xero companies! Save invoices, contracts or any other kind of document straight into Xero with fully secure access.

Docs2me is a great way to boost productivity by making it quick and easy to upload paper files to a cloud-based platform for fast access anywhere, anytime. Docs2me provides seamless business automation from document management to workflow automation.

App Configuration

Below are the optional configuration changes that can be done on the application before deployment. This can be updated at any time through the HP Command Center or by your print vendor.

Configure this solution
Note: All other devices that you select will use this configuration.

 Saved configuration (07/12/2022, 8:42 AM) [Copy from device](#) [Restore defaults](#)

Xero Default Email Address ⬆

Allow user to input filename


Default Print Options ⬆

Number of copies *

Output Sides

Print Color

Configure this solution
Note: All other devices that you select will use this configuration.

 Saved configuration (07/12/2022, 8:42 AM) [Copy from device](#) [Restore defaults](#)

Output Sides

Print Color


Print Size

Paper Type

Paper Tray

Configure this solution

Note: All other devices that you select will use this configuration.

 Saved configuration (07/12/2022, 8:42 AM)

[Copy from device](#)

[Restore defaults](#)

File Type	PDF	▼
Resolution	300 dpi	▼
Quality and File Size	High (large file)	▼
Original Sides	1-sided	▼
Scan Color	Auto	▼
High Compression (smaller file)	<input checked="" type="checkbox"/>	

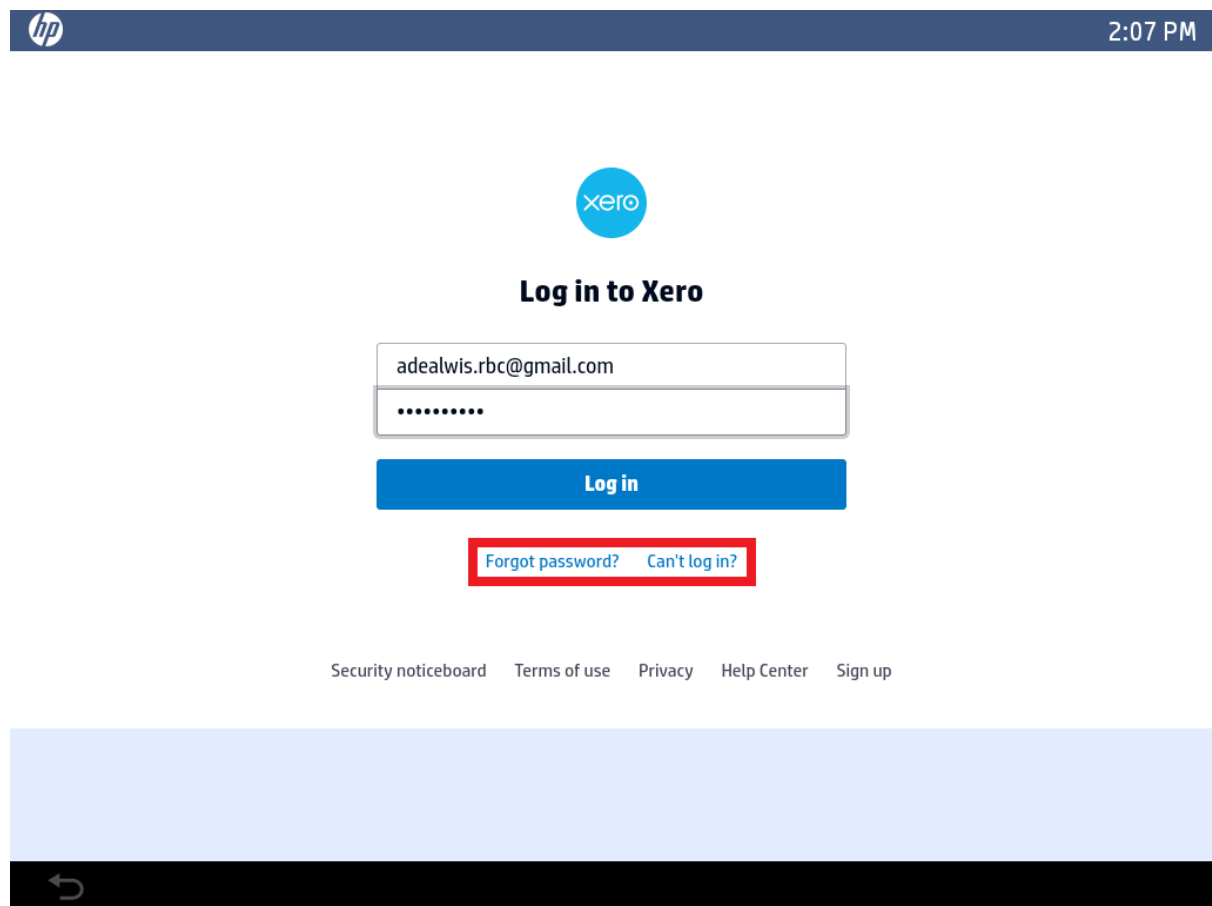
Instructions Guide

Please see below the steps on how to operate the application to ensure the application is used correctly.

Login Page


After clicking the Xero application icon on your printer, you will be prompted to key in your login details. If there are any issues logging in, please use the 'Forgot password' option first to troubleshoot before selecting 'Can't log in?'


If there are issues accessing your account from here, please reconfirm your login details through a web browser on your personal device.



Access Verification Page


Once you have successfully logged in, the permissions screen will launch and prompt for access to ensure that the application is able to sync to users' Xero account information correctly.

1:33 PM




docs2me for Xero wants access to:

Organisation data



RBC-BNE
View and manage your file library and projects

User account information



Achalinda De Alwis
View your name, email, and user profile.

By allowing access, you agree to the transfer of your data between Xero and this application in accordance with Xero's [Terms of use](#) and the application provider's terms of use and privacy policy.

You can disconnect at any time by going to [Connected apps](#) in your Xero settings.

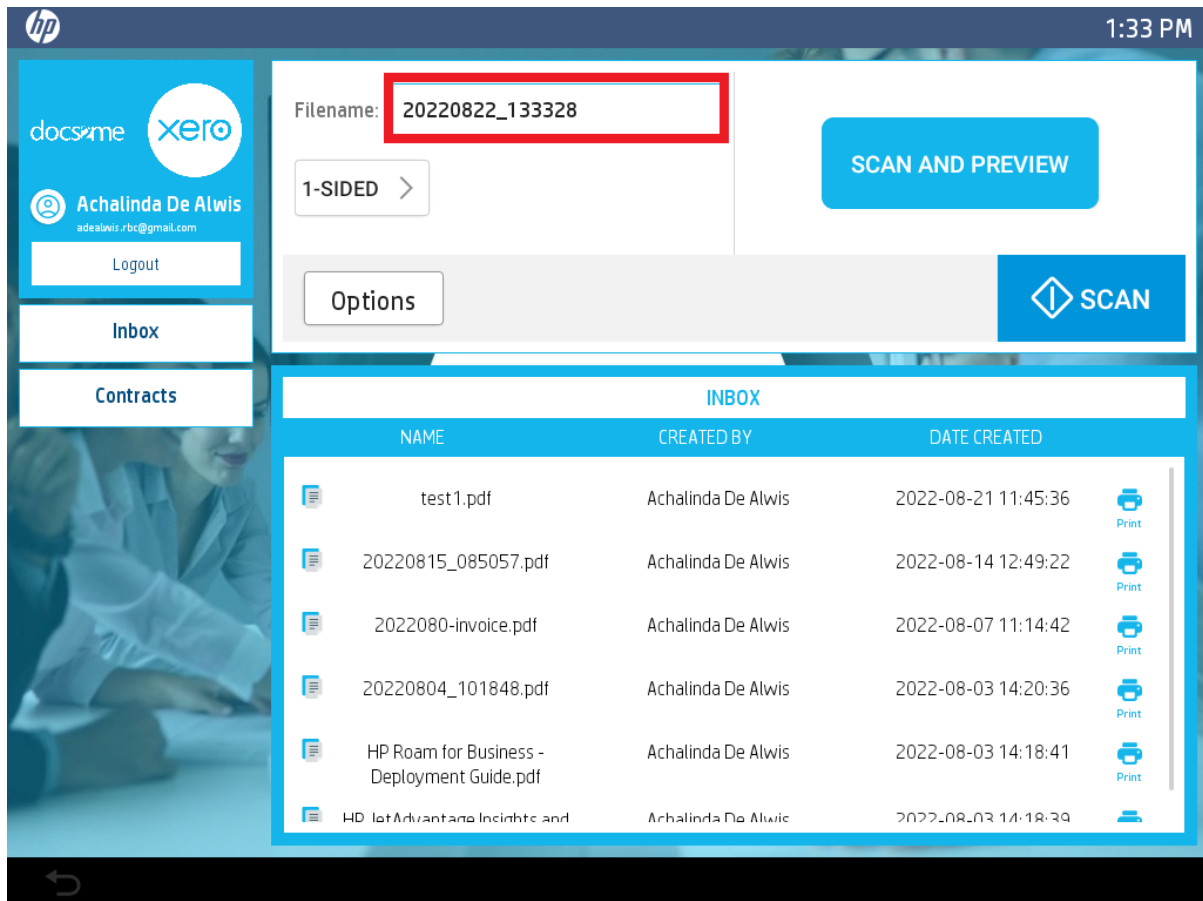
Allow access

[Cancel](#)



Home Page/Scan Page

Below is the home page of the application, users are given the option to scan and preview their documents before having the scans sent directly to Xero. Users are allowed to modify the Filename as shown below in the box next to 'Filename:' as the file names are automatically generated all the time.



The screenshot displays the HP DocuSign Xero interface. The top navigation bar includes the HP logo and the time 1:33 PM. The left sidebar contains the DocuSign and Xero logos, the user's name 'Achalinda De Alwis' with email 'adealwis.rbc@gmail.com', a 'Logout' button, and menu items for 'Inbox' and 'Contracts'. The main content area features a 'Filename:' field with the value '20220822_133328' highlighted in a red box, a '1-SIDED >' dropdown, and a 'SCAN AND PREVIEW' button. Below this is an 'Options' button and a 'SCAN' button with a document icon. The 'INBOX' section contains a table of scanned documents.

NAME	CREATED BY	DATE CREATED	
test1.pdf	Achalinda De Alwis	2022-08-21 11:45:36	Print
20220815_085057.pdf	Achalinda De Alwis	2022-08-14 12:49:22	Print
2022080-invoice.pdf	Achalinda De Alwis	2022-08-07 11:14:42	Print
20220804_101848.pdf	Achalinda De Alwis	2022-08-03 14:20:36	Print
HP Roam for Business - Deployment Guide.pdf	Achalinda De Alwis	2022-08-03 14:18:41	Print
HP JetAdvantage Insights and	Achalinda De Alwis	2022-08-03 14:18:39	Print

Scan Output Settings

On the home page, users are allowed to change the output setting on how they would like their documents to be scanned through. This includes the option to scan the documents in an OCR format, colour, resolution, orientation, etc. Please use the 'Scan and Preview' button if users would like to review the scanned document.

The image shows two screenshots of a mobile application interface for scanning documents. The top screenshot shows the main scan screen with the 'Options' button highlighted in a red box. The bottom screenshot shows the 'Options' menu expanded, with the 'SCAN AND PREVIEW' button highlighted in a red box.

Top Screenshot (Main Scan Screen):

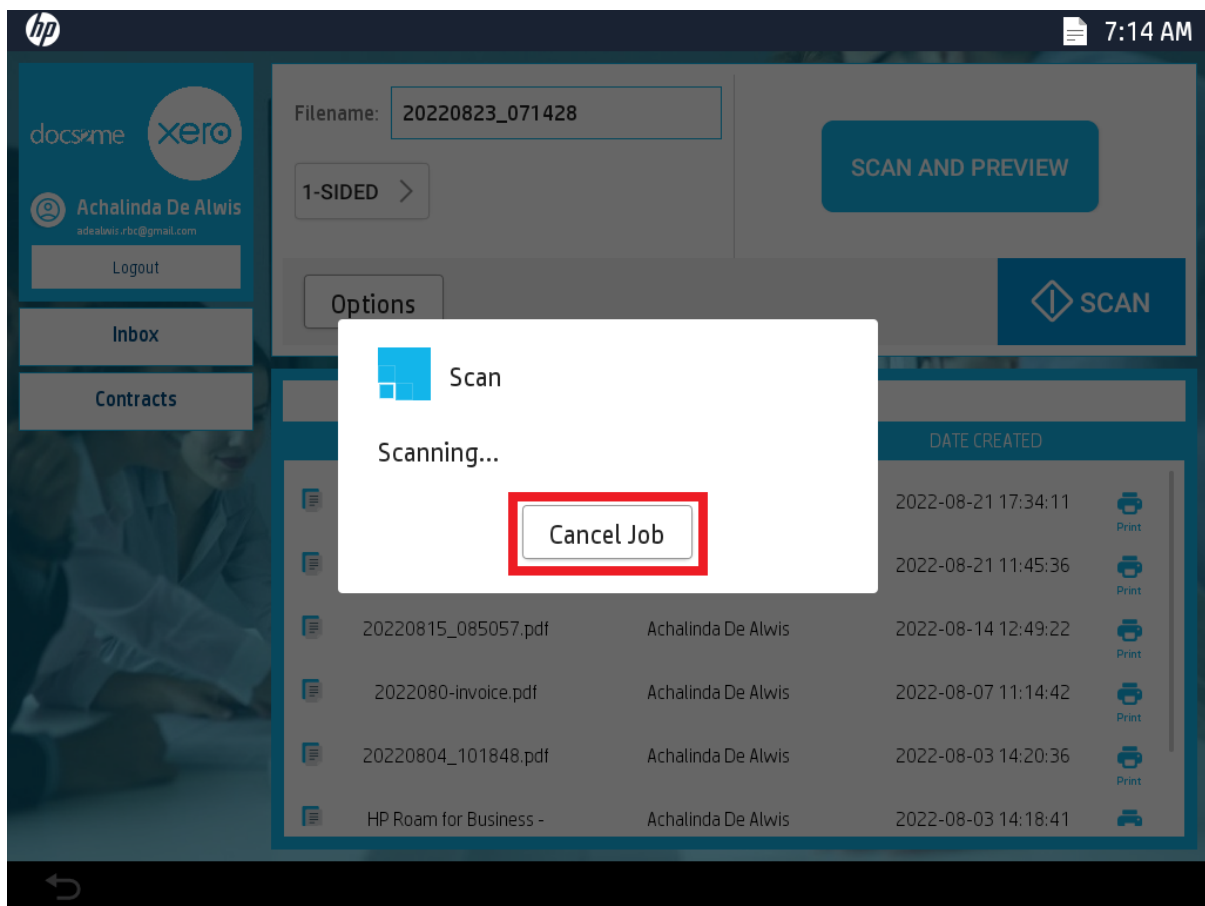
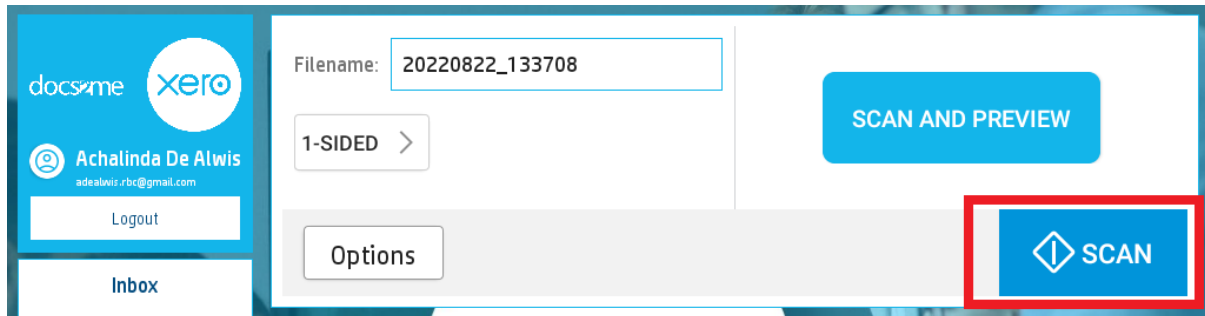
- Header: docsme xero
- User: Achalinda De Alwis (adealwis.rbc@gmail.com)
- Logout button
- Inbox button
- Filename: 20220822_133328
- 1-SIDED > button
- SCAN AND PREVIEW button
- Options button (highlighted in red)
- SCAN button

Bottom Screenshot (Options Menu Expanded):

- Header: docsme xero
- User: Achalinda De Alwis (adealwis.rbc@gmail.com)
- Logout button
- Inbox button
- Contracts button
- Options menu items:
 - File Type and Resolution: PDF, 200 dpi
 - Original Sides: 1-sided
 - Color/Black: Automatically detect color or black
 - Original Size: Any Size
 - Content Orientation: Portrait
- Hide Options button
- SCAN AND PREVIEW button (highlighted in red)
- SCAN button

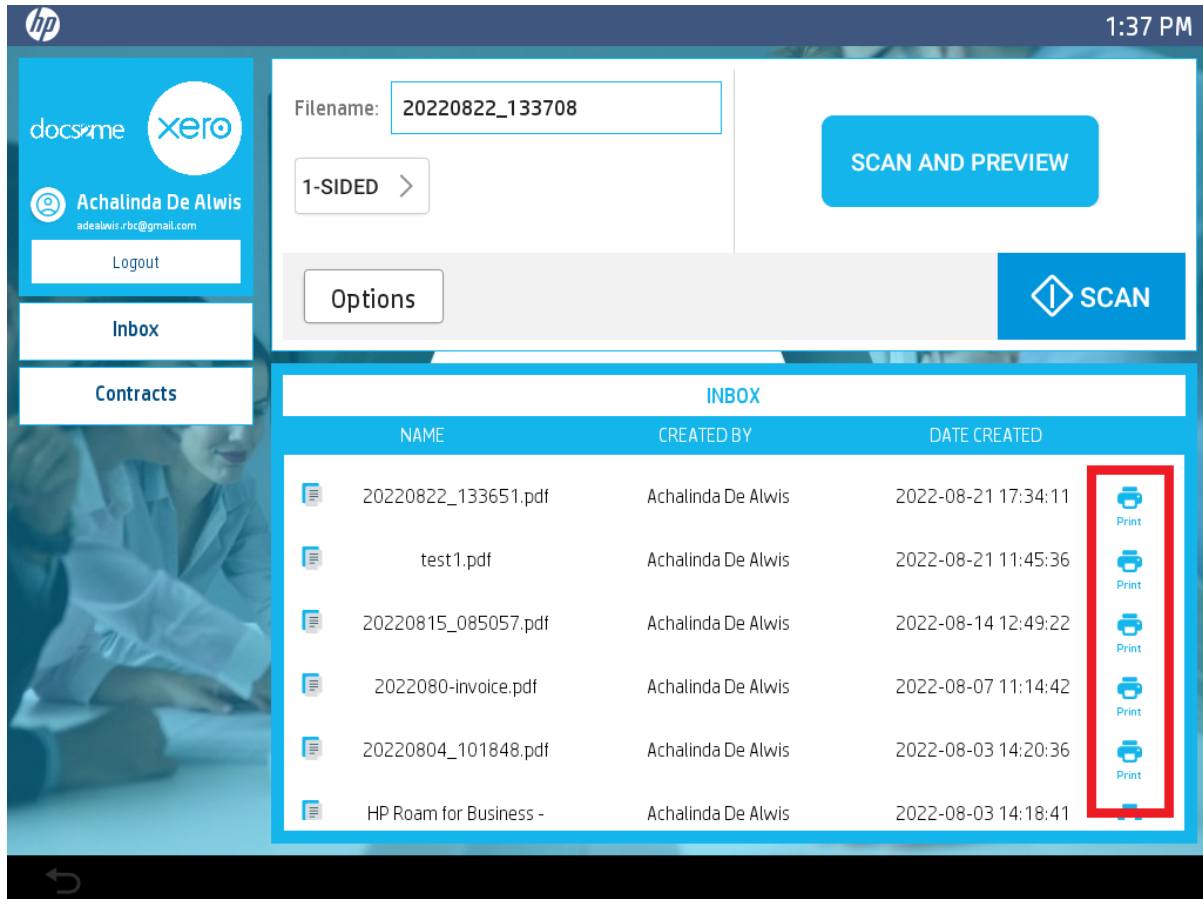
Scan Progress Screen

The screen below will appear when users click on the SCAN button. This shows the scanning functionality, users will have the capability to cancel the job by clicking on the 'Cancel Job' button as shown below. This will stop the scanning and the document will not be sent through to Xero.



Option to Print from Xero

Users have the option to print the files listed from their Xero account as well. Please take note of the 'Print' button next to the file that has been scanned through, as well as the other files that are already on the account.



The screenshot displays the HP docuShare Xero interface. On the left, there is a navigation menu with 'Contracts' selected. The main area shows a 'FILENAME' field with '20220822_133708', a '1-SIDED' dropdown, and 'SCAN AND PREVIEW' and 'SCAN' buttons. Below this is an 'INBOX' table with columns for NAME, CREATED BY, and DATE CREATED. A red box highlights the 'Print' icons for the first five rows of the table.

NAME	CREATED BY	DATE CREATED
20220822_133651.pdf	Achalinda De Alwis	2022-08-21 17:34:11
test1.pdf	Achalinda De Alwis	2022-08-21 11:45:36
20220815_085057.pdf	Achalinda De Alwis	2022-08-14 12:49:22
2022080-invoice.pdf	Achalinda De Alwis	2022-08-07 11:14:42
20220804_101848.pdf	Achalinda De Alwis	2022-08-03 14:20:36
HP Roam for Business -	Achalinda De Alwis	2022-08-03 14:18:41

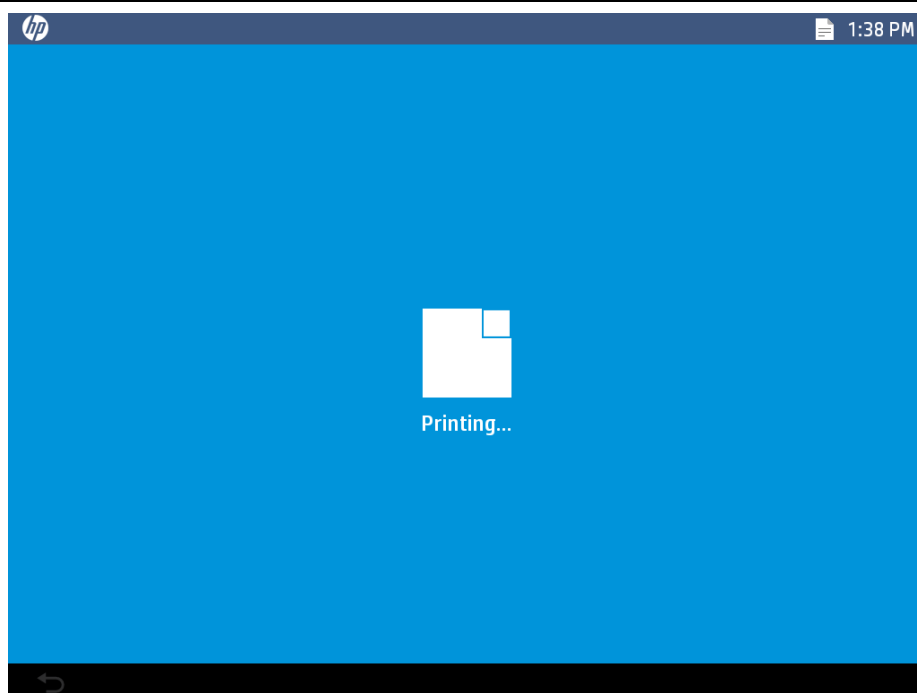
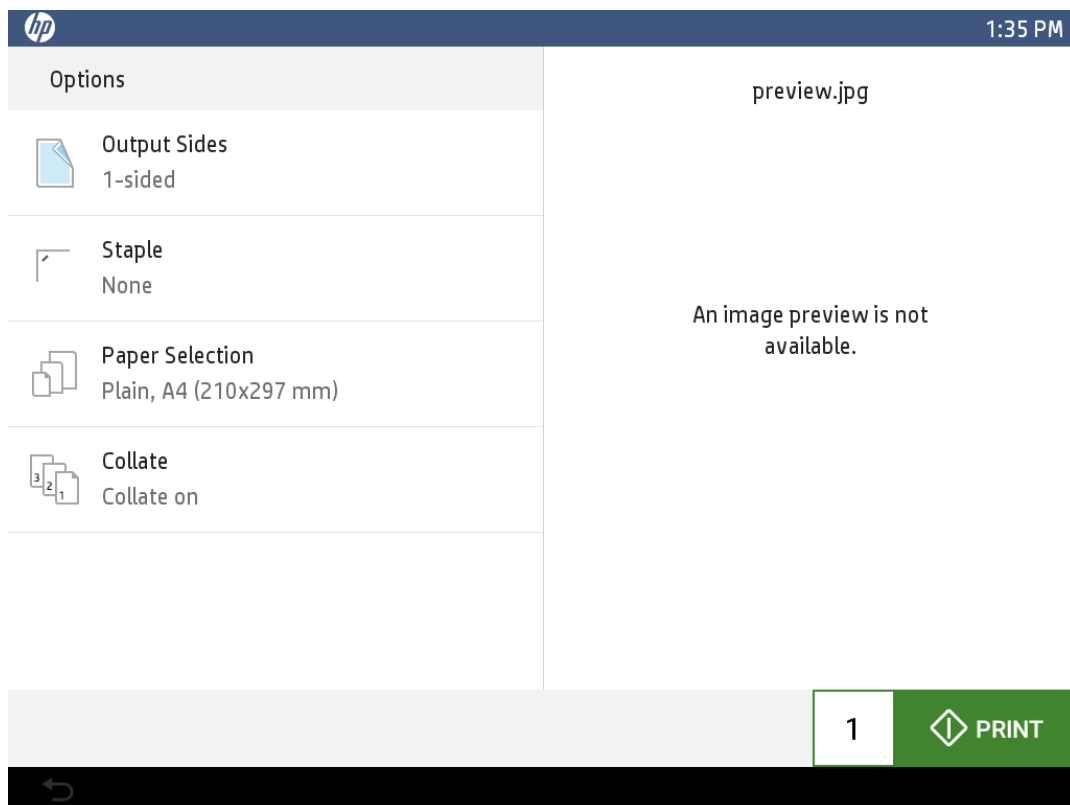
Print Preview

After selecting the document to print, users will see the pop-up below that will show the preview of the file that will be printed to ensure the users can view the document they are wanting to print.

The screenshot shows a mobile application interface. At the top left is the HP logo. The top right corner displays the time '1:38 PM'. On the left side, there is a sidebar with the following elements: 'docsme' and 'xero' logos, a user profile for 'Achalinda De Alwis' with email 'adealwis.rbc@gmail.com', and buttons for 'Logout', 'Inbox', and 'Contracts'. The main content area is partially obscured by a 'File Preview' pop-up window. The pop-up has a title bar with 'File Preview' and a close button. The document preview shows the title 'HP JetAdvantage Insights and Secure Print Technical Training' and an image of a person using a tablet. Below the image is a 'Notice' section with small text and a copyright notice for HP. At the bottom of the pop-up is a blue button labeled 'PRINT FILE'. In the background, a list of documents is visible with columns for 'DATE CREATED' and 'Print' icons. The dates listed are: 2-08-21 17:34:11, 2-08-21 11:45:36, 2-08-14 12:49:22, 2-08-07 11:14:42, 2-08-03 14:20:36, and 2-08-03 14:18:41.

Print Output Settings

When clicking on the 'Print File' button, users will be provided the below options to change the output settings of the document that they have selected. The below screen shows the options that are given to the user to modify if needed for the printed document. The next screen shows the printer processing the print job.



Logging Out

As shown in the screen below, users are advised to log out of their accounts as soon as they are done with the usage of the application as they will stay signed in until they have logged out of their accounts. Please select the 'Logout' underneath the user's displayed name to sign out of the application.

