

Azopio's Quick Setup Guide



CREATE AN ACCOUNT

1

Register, subscribe from Azopio's website



CHOOSE YOUR SUBSCRIPTION

2

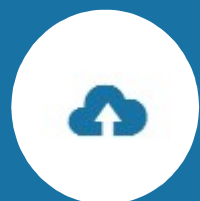
Select the subscription that suits your needs



SET UP YOUR STORAGE SERVICE

3

Select your storage solution



EMAIL, SCAN, SNAP AND CONNECT YOUR DOCUMENTS

4

Send your documents and setup the auto-retrieval tool

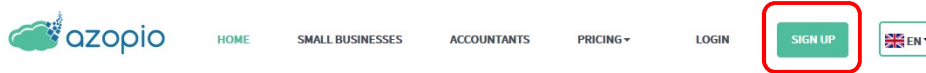




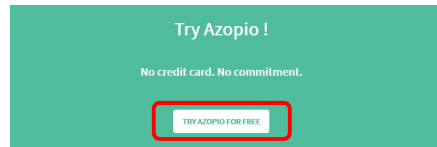
Create your account

In order to subscribe to our services you need to register from our website www.azopio.com.

- You can register by directly clicking on the “Sign Up” button, located on the top right of each web page



- Or by clicking on the “Try Azopio for free” button, located on the center-bottom of each web page



- Or by clicking on the “Get this plan” button, located on the Pricing/Subscription web page

Free	Starter	Standard	Premium
\$ 0.00/ <small>month</small>	\$ 12.45/ <small>month</small>	\$ 19.95/ <small>month</small>	\$ 37.45/ <small>month</small>
1 user 10 documents processed monthly Limited detailed search Limited processing email forwarding (body and/or attachment) <small>(Up to 1000 email per month)</small> No supplier account connected to automatically retrieve invoices No bank account connected to automatically retrieve transactions No option to send documents to two different selected destinations	2 users 50 documents processed monthly Unlimited detailed search Unlimited processing email forwarding (body and/or attachment) <small>(Up to 1000 email per month)</small> Up to 50 supplier accounts connected to automatically retrieve invoices Up to 1 bank account connected to automatically retrieve transactions Option to send documents to two different selected destinations	3 users 200 documents processed monthly Unlimited detailed search Unlimited processing email forwarding (body and/or attachment) <small>(Up to 1000 email per month)</small> Up to 100 supplier accounts connected to automatically retrieve invoices Up to 3 bank accounts connected to automatically retrieve transactions Option to send documents to two different selected destinations	5 users 1000 documents processed monthly Unlimited detailed search Unlimited processing email forwarding (body and/or attachment) <small>(Up to 1000 email per month)</small> Up to 200 supplier accounts connected to automatically retrieve invoices Up to 5 bank accounts connected to automatically retrieve transactions Option to send documents to two different selected destinations
GET THIS PLAN	GET THIS PLAN	GET THIS PLAN	GET THIS PLAN

Once one of these buttons has been clicked, you will be prompted to fill all of the mandatory information fields.

Create an account

First name *

Last name *

Company name *

Email address *

Enter a password *

Confirm your password *

Passwords must contain a minimum of 8 characters
They must contain letters, numbers and special characters

I agree to Azopio's General Conditions of Use of Azopio services

[CREATE THE ACCOUNT](#)

[Privacy Policy](#)

The website uses a 256-bit SSL encryption

All the fields must be filled and the “I agree to Azopio’s General Conditions of Use” checkbox must be checked before submitting the form.

Once you clicked on the button “Create your account”, an activation email will be sent out to the email address that you have provided.

The activation of your account will be effective once the activation link has been clicked.



Warning! You will not be able to access your account if you have not activated your account from the link contained in the email that has been sent out to you!



Choose your subscription

The choice of your subscription can only be done once your account has been activated.

Once you first connect on the Azopio platform (<https://app.azopio.com>) , with the log-in details that you have chosen during your registration (email address and password), you will be asked to confirm the type of subscription you wish to sign-up for.

YOUR SUBSCRIPTION DETAILS:

You have subscribed to **STANDARD**

Display prices in :
(Excl. Taxes)

USD (US Dollar)

	FREE	STARTER	STANDARD	PREMIUM
Monthly subscription cost	\$0.00/Month	\$12.45/Month	\$19.95/Month	\$37.45/Month
Maximum number of users	1	2	3	5
Maximum number of documents processed per month)	10	50	200	1,000
Detailed search	Limited	✓	✓	✓
Email processing	Limited <small>(Up to 3 emails per month)</small>	Limited <small>(Up to 50 emails per month)</small>	Limited <small>(Up to 200 emails per month)</small>	Limited <small>(Up to 1,000 emails per month)</small>
Automatically retrieve your Supplier invoices	-	50	100	200
Automatically retrieve your banking transactions	-	1 accounts	3 accounts	5 accounts
Option to send your documents to two different destinations of your choice	-	✓	✓	✓
	<input type="button" value="SUBSCRIBE"/>	<input type="button" value="SUBSCRIBE"/>	<input type="button" value="UNSUBSCRIBE"/>	<input type="button" value="SUBSCRIBE"/>

If you select the “FREE” package, you will immediately go onto the step “Configuration of your storage solution”.

If you select one of our monthly subscriptions “STARTER”, “STANDARD” or “PREMIUM” you will be asked to enter you billing and payment method details. Once this done, you will automatically move onto the “Configuration of your storage solution”.



If in any given month you exceed your quota of documents (your quota depends on the plan you subscribed to) then all documents exceeding this quota will not be processed by Azopio (but they will still be filed in the “Other” directory).



Setup your storage service

To start using Azopio services, you must at least set-up one storage service (Primary storage service) from one out of the four solutions offered: Box, Google Drive, OneDrive or DropBox.

For this you need to:

- Click on the tab "Manage your account"

The screenshot shows the Azopio dashboard. At the top left is the Azopio logo. To the right, the user email 'testing@azopio.com' and a language dropdown set to 'EN' are visible. Below the header is a search bar with 'Search by keywords' and an 'OK' button. Two buttons, 'BROWSE YOUR FILES' and 'ADD A DOCUMENT', are positioned below the search bar. A navigation bar contains three tabs: 'Home Azopio Testing', 'Manage your documents', and 'Manage your account' (which is highlighted with a red border). The main content area displays a grid of management options. On the left, there are three 'MANAGE' buttons: 'YOUR ACCOUNT SETTINGS', 'YOUR SUBSCRIPTION', and 'YOUR DEMAT'BOX'. On the right, there are four 'ADD' buttons: 'YOUR CLOUD SERVICES (STORAGE, ONLINE ACCOUNTING,...)' (highlighted with a red border), 'YOUR BANK ACCOUNTS', 'YOUR SUPPLIERS' ACCOUNTS', and 'YOUR DEMAT'BOX'.

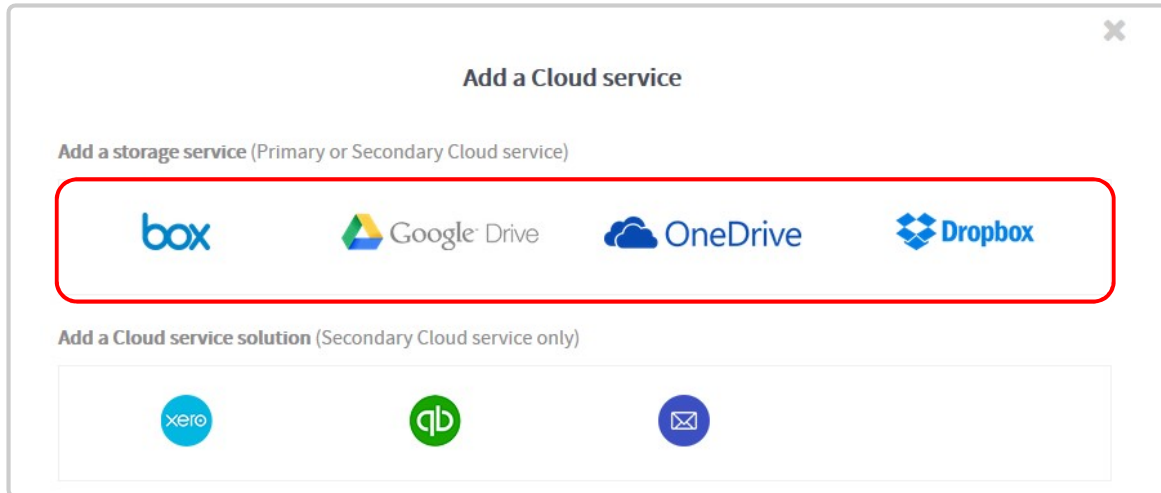
- Then click on "Add your Cloud services"

This screenshot shows the 'Configure your Cloud services' page in the Azopio dashboard. The layout is similar to the previous screenshot, but the 'Manage your account' tab is active. Below the navigation bar, the heading 'Configure your Cloud services' is displayed. A large button with a green plus sign and the text 'Add a Cloud service' is highlighted with a red border.



Set up your storage service (cont.)

- A new window is popping up, inviting you to select one of the four pre-configured storage services (Box, Google Drive, Dropbox and/or Dropbox)



- If you already hold an account with one of the four storage service providers, select it by clicking on the corresponding icon; You will then be automatically directed onto the concerned service that will invite you to enter your username and password; once the latest entered, the connection with your Azopio account will be automatic;
- If you have not yet created your account amongst one of those four storage service providers, all offering a free storage service, you will now need to choose a solution by clicking on the corresponding icon and to follow the registration steps. Once your account is created you will then be able to connect your Azopio account.



Once your primary storage service is configured, you can immediately start to send documents to Azopio. Using the same methodology you can also configure your secondary services (whether it is a storage solution or not).

Although all documents are, by default, saved in your primary storage service, you can also select (except for the "FREE" subscription plan), for each types of documents ("Supplier invoice", "Client invoice", "Receipt", "Bank" or "Other", another (and specific) processing service (i.e. your secondary service).



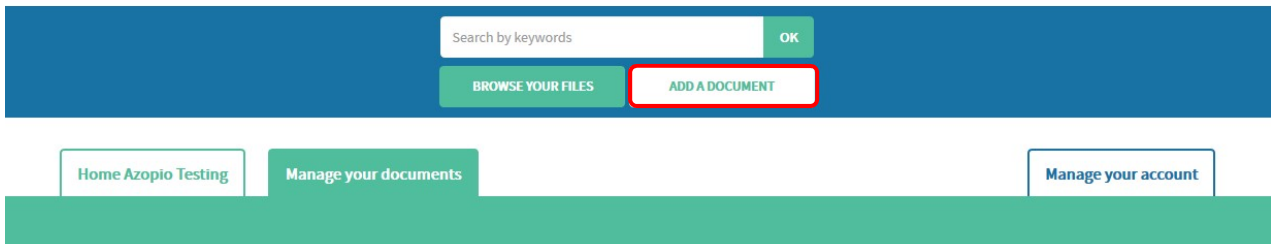
Email, scan, snap and connect your documents

You are now all set to send us your documents.

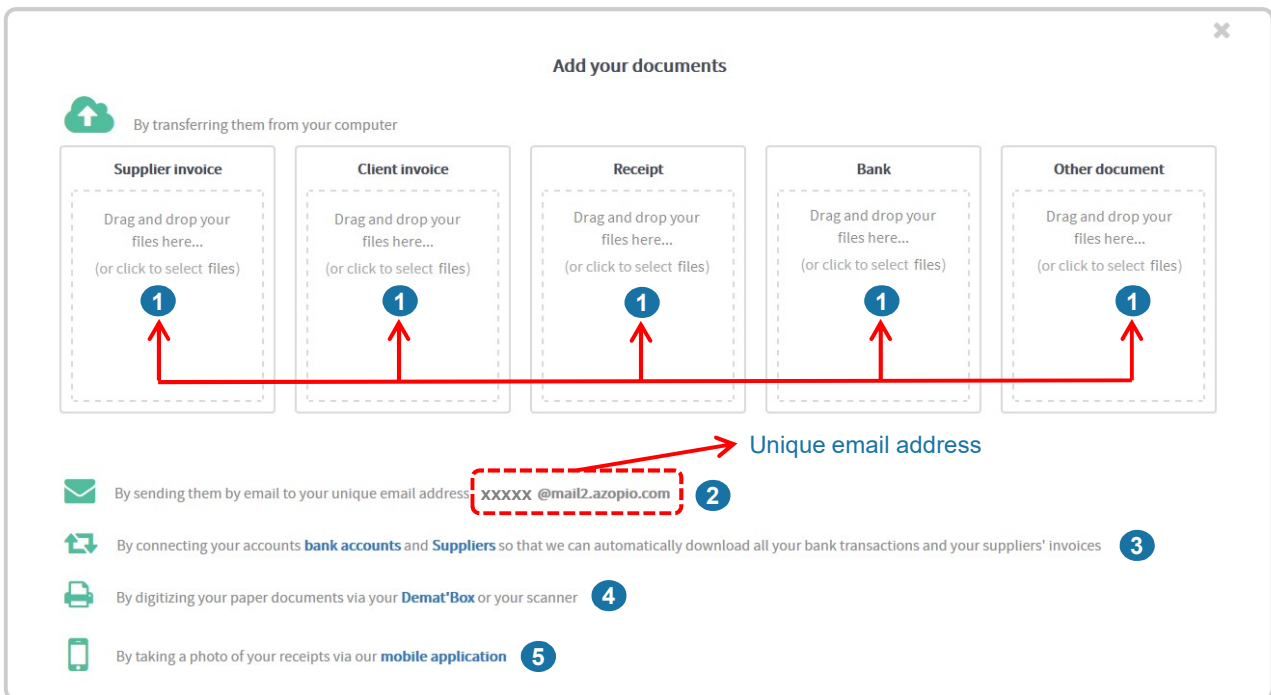
Click on the “Add a document” button:



testing@azopio.com



When clicking on this button, a new window will display all the different ways to send us a document:



You can thus send us your documents:

- By Clicking/Dropping them or by selecting them from the graphic interface **1**
- By sending them by email to your unique email address **2**
- By connecting your bank accounts (so that Azopio automatically retrieves the bank transactions of a specific account) or your suppliers' invoices (so that Azopio automatically retrieves the invoices of a specific supplier) **3**
- By digitalizing your paper documents (Azopio advises using the Demat'Box to gain productivity) **4**
- By taking a snap of your receipts (you will beforehand need to install our mobile application of your mobile phone) **5**



If you have any trouble, please refer to the User Guide available on:
<https://support.azopio.com/manuals>

Or please contact the Azopio Support Team:
Email: support@azopio.com

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