

# Viewpost Sync for Desktop QuickBooks: Getting Started Guide

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## Prerequisites

### User Permissions - Payments

Users will need both *Manage Contacts* and *Create Check(including early payment)* permissions in Viewpost to sync payments using Viewpost Sync for QuickBooks. *Sign Check (including early payment)* permission is required to send the payment – either by the sync user or a different user who can approve the payments on Viewpost after they have been sent to Viewpost.

### User Permissions - Send Invoices

Users will need *Modify Invoices*, *Void Invoices*, *Unvoid Invoices* and *Manage Contacts* permissions in Viewpost to send invoices using Viewpost Sync for QuickBooks.

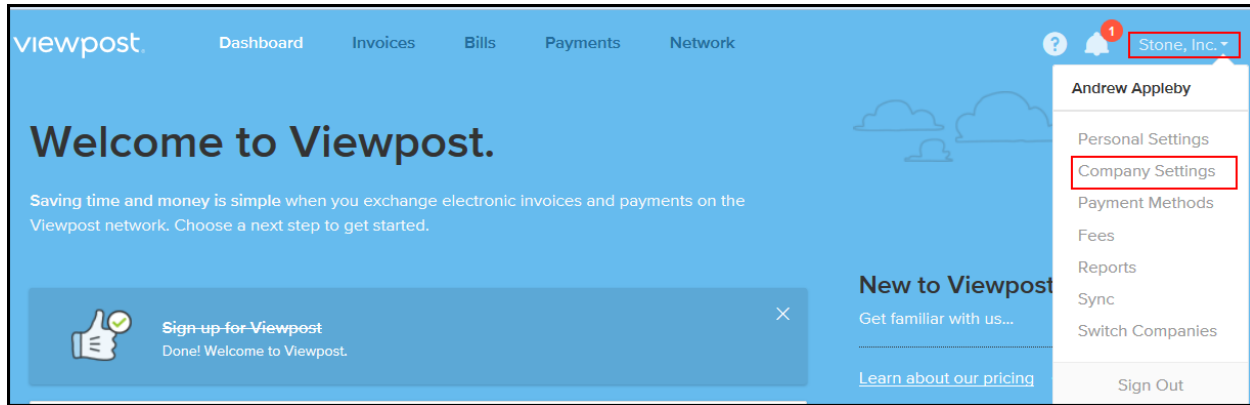
### User Permissions - Sync Bills

Users will need *Approve Bills*, *Modify Bills* and *Manage Contacts* permissions in Viewpost to sync bills from Viewpost into QuickBooks or from QuickBooks to Viewpost.

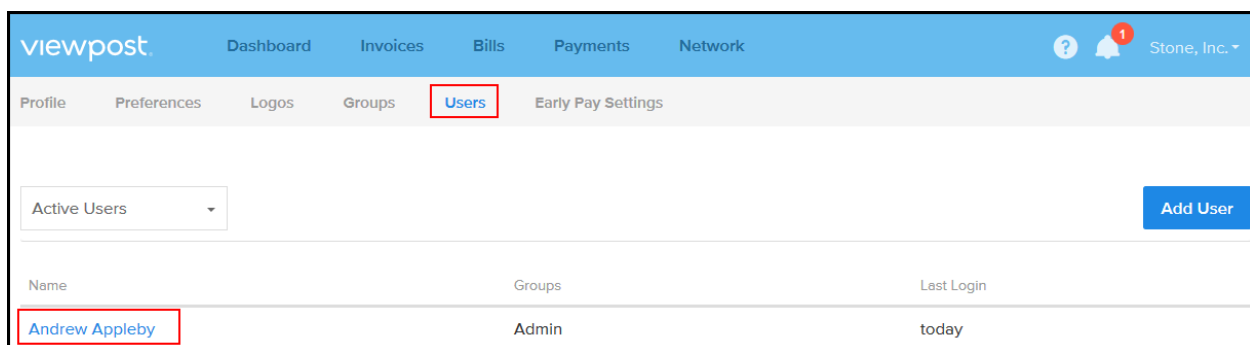
### How to change permissions

To check permissions assigned to a user, a user with “Modify Users and Groups” permission should log in to Viewpost.com, click on the company name and navigate to *Company Settings*.

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Click *Users* and select the user you want to change permissions for.



To add permissions, you can either modify existing permission groups assigned to the user (select *Groups* from the menu, then click the related group) or create a custom group (select *Add Group*, then create the group and assign it to the user).

**Note:** If you change a *Group*, the new permissions will apply to all Users that have this *Group* assigned.

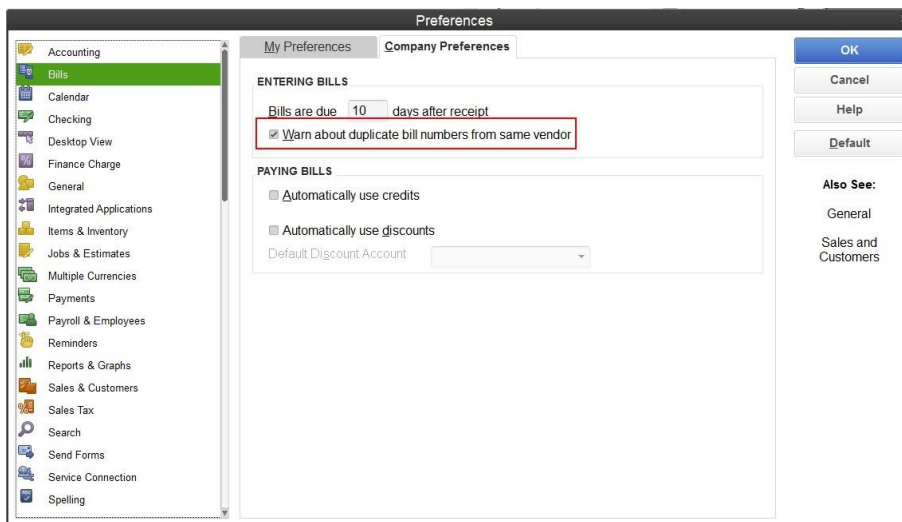
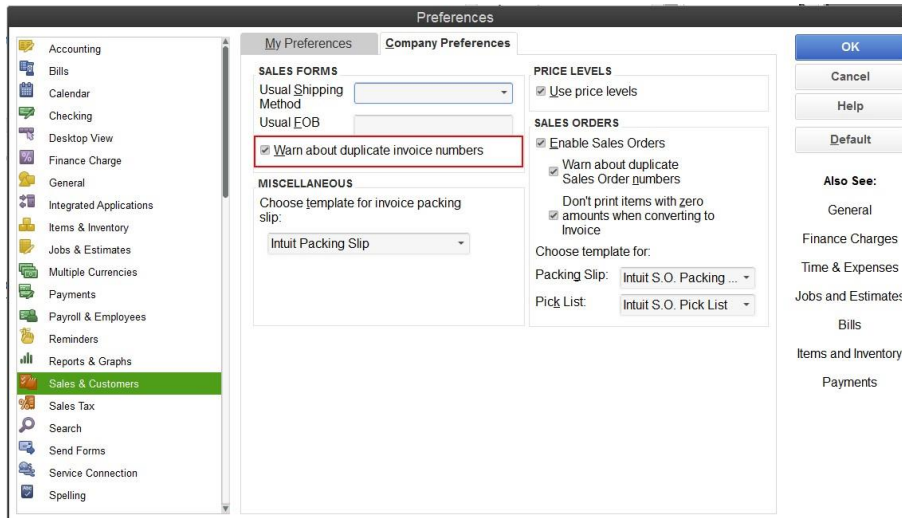
### Registered Bank Account

In order to make payments out of QuickBooks via Viewpost, you need to [register a bank account with Viewpost](#). Once setup, you can link your QuickBooks bank accounts with your Viewpost registered payment methods.

### Unique Invoice and Bill numbers in QuickBooks

In order for Viewpost Sync for QuickBooks to work properly, please make sure you use unique invoice numbers for invoices and reference numbers for bills in QuickBooks. We also recommend to enable *Warn about duplicate invoice numbers* in QuickBooks (*Edit > Preferences > Sales & Customers*; on *Company Preferences* tab check *Warn about duplicate invoice numbers*) and *Warn about duplicate bill numbers from same vendor* (*Edit > Preferences > Bills*; on *Company Preferences* tab check *Warn about duplicate bill numbers from same vendor*).

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## Open QuickBooks company file

In order for Viewpost Sync for QuickBooks to access your QuickBooks company file, QuickBooks needs to be running and the QuickBooks company file you want to connect to needs to be open. We also recommend that the file be in single user mode.

**Note:** Please be aware that a QuickBooks admin user has to authorize access to the QuickBooks file during installation before a non-admin user can use the file for Viewpost Sync with QuickBooks.

## Download, Installation and Initialization

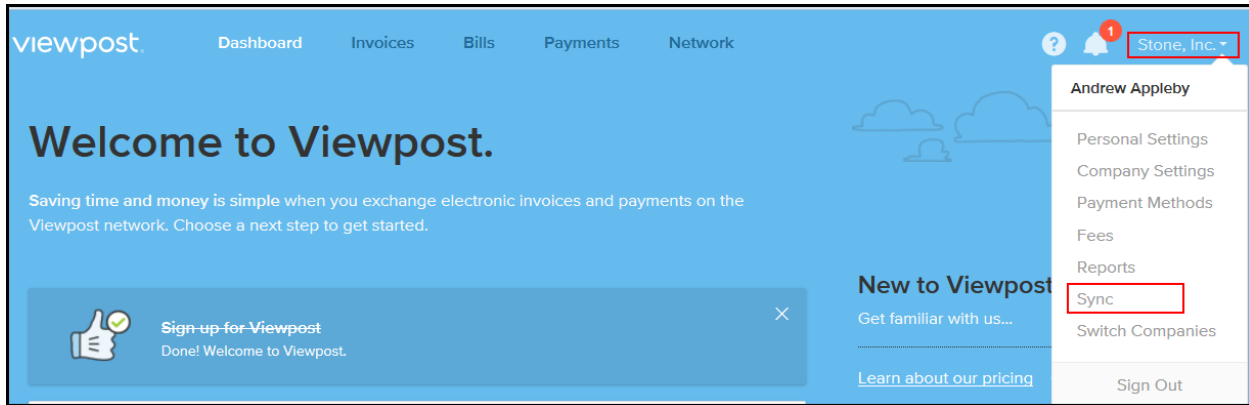
Installing Viewpost Sync for QuickBooks and connecting your Viewpost account with your QuickBooks data is easy. In fact it's not only easy but can be done in no time.

**Note:** Prior to using Viewpost Sync for QuickBooks, we recommend that you back-up your QuickBooks company file.

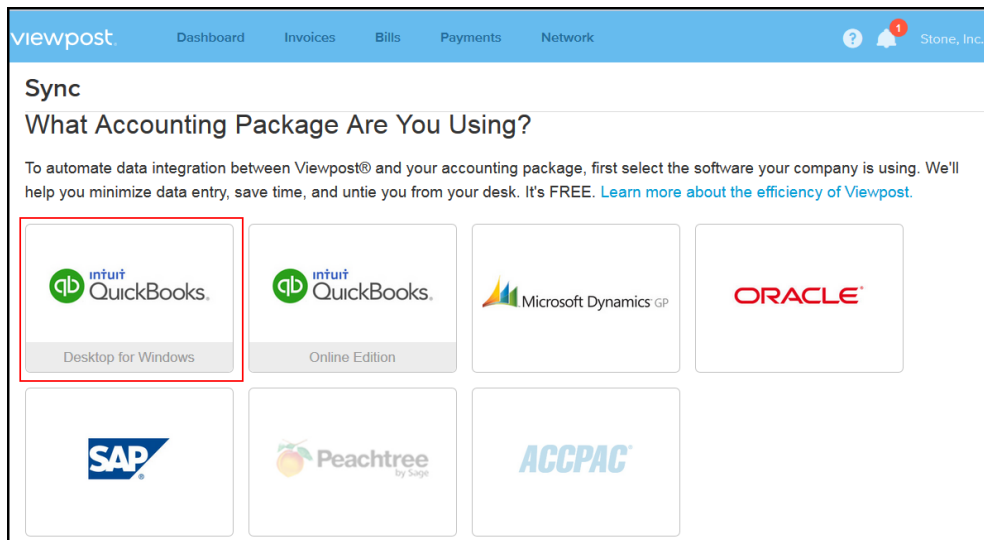
## Download Viewpost Sync for QuickBooks

Log in to Viewpost.com. Select your company name in the upper right corner and go to *Sync*.

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Select QuickBooks (Desktop for Windows) as your accounting software.



Click *Download Viewpost Sync for QuickBooks* and save the installer file to your desktop or another accessible file location of your choice.

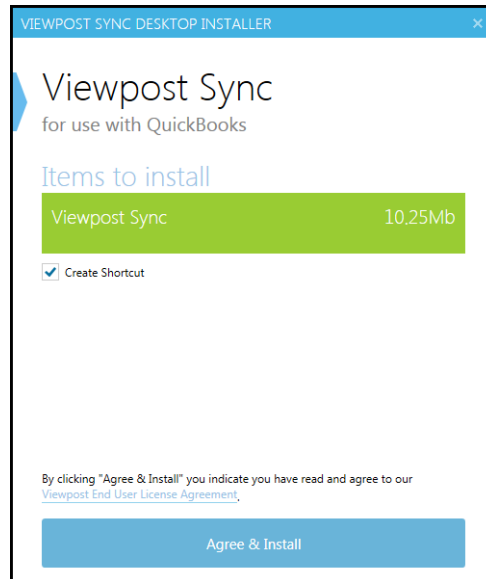


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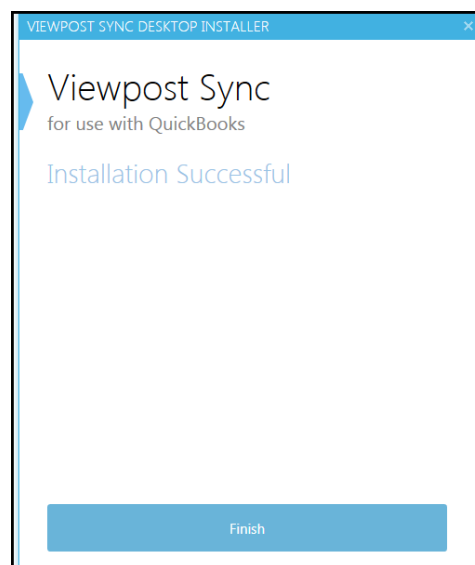
## Install and launch Viewpost Sync for QuickBooks.

Run the installer file (double click) to initiate the installation process. If you have Windows 10 Operating System, please read the article in the Help Section “Windows 10 and QuickBooks Sync Agent Installation” which is located at [Windows 10 and QuickBooks Sync Agent Installation](#).

Click *Agree & Install* to confirm that you have read and agree to our Viewpost End User License Agreement and to start the installation process.

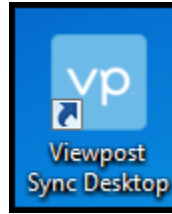


Click on Finish.



Navigate to your desktop to locate the Viewpost Sync Desktop icon and click on it to launch the application.

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## Sign in

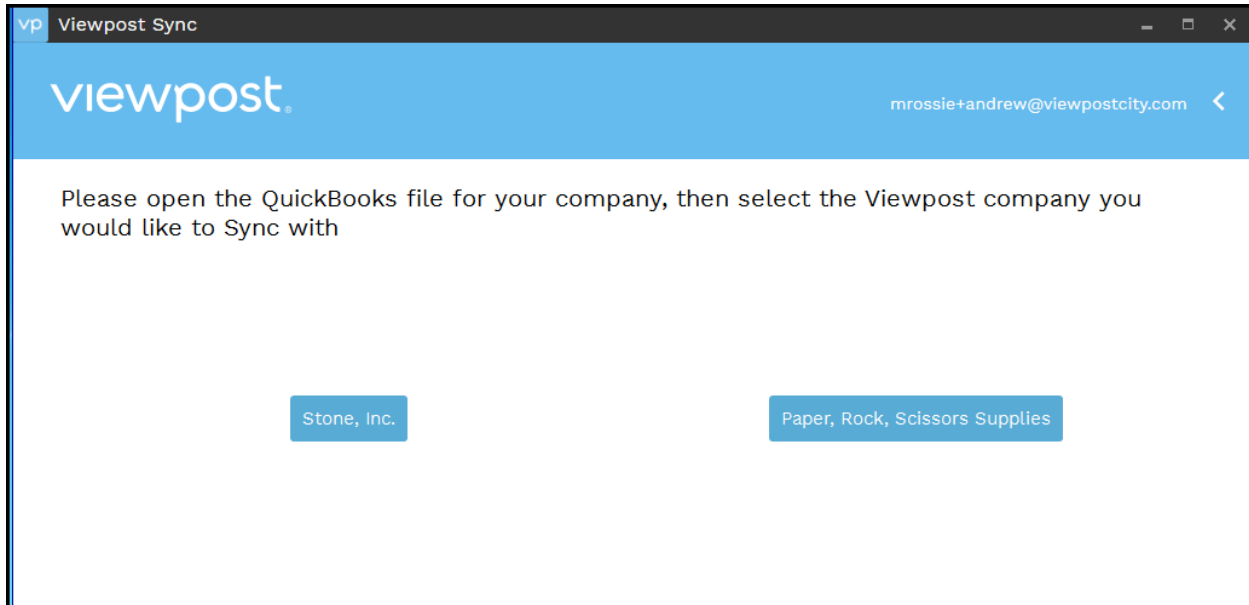
After launching Viewpost Sync, please provide your Viewpost username (your email address that you registered with) and password, then click *Sign in*.

**Note:** The QuickBooks company file needs to be open before you sign in! Be sure that only one QuickBooks company file is open.

The screenshot shows the Viewpost Sync Desktop application window. The title bar reads 'vp Viewpost Sync'. The main content area has a blue header with the 'viewpost.' logo and a back arrow. Below the header, the text 'Welcome.' is displayed, followed by a sub-header: 'Viewpost Sync connects with QuickBooks to make sending and receiving invoices, bills, and payments easy.' To the right, there is a sign-in form with the heading 'Enter your Viewpost credentials to get started'. The form includes a dropdown menu for company selection, a password field, and a 'Sign in' button. A note at the bottom of the form states: 'Before signing in, please make sure QuickBooks is running and your company file is open.'

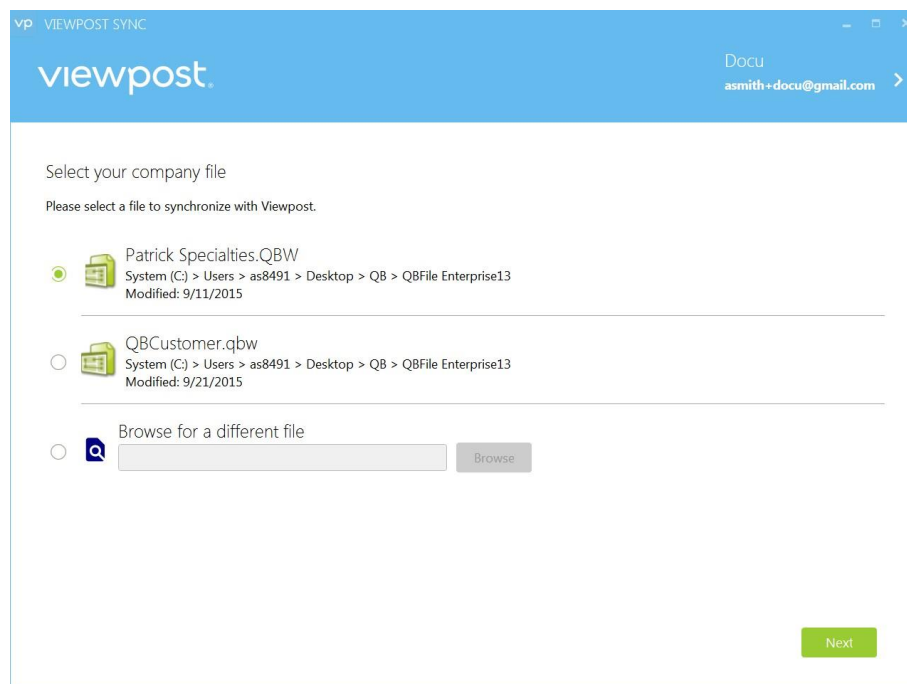
If you have created multiple Viewpost company accounts using the same Viewpost username/email address, you will be asked to select the company you will be syncing.

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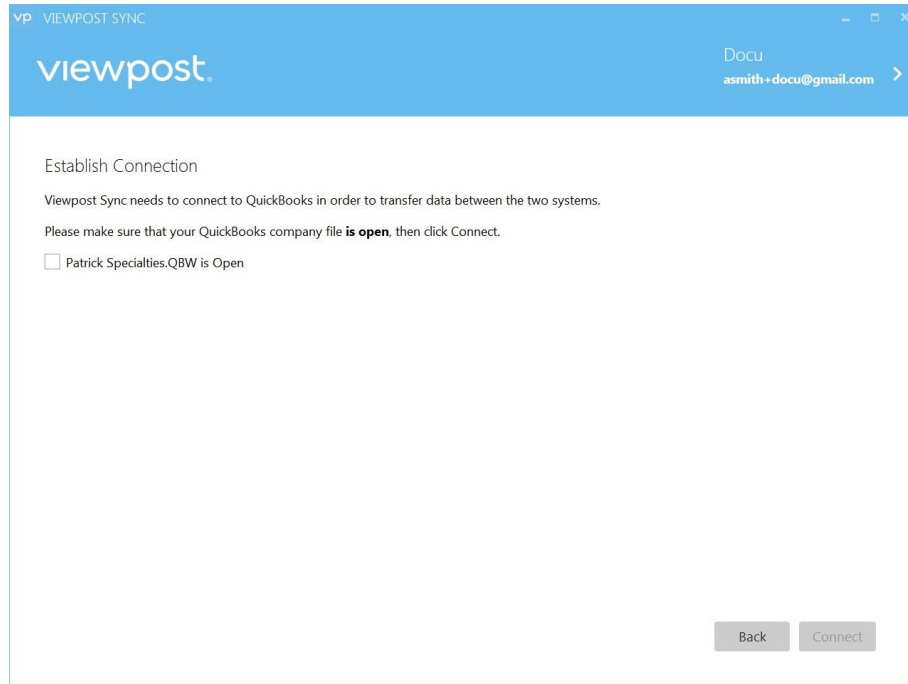
### Select QuickBooks file and Authorize Access

After successfully signing in, a list of recently used QuickBooks company files will be displayed. Select the radio button next to the file you want to use, then Click *Next*. If the file you want to use with Viewpost Sync is not displayed, select the input field and *Browse* to locate the file then click *Next*.

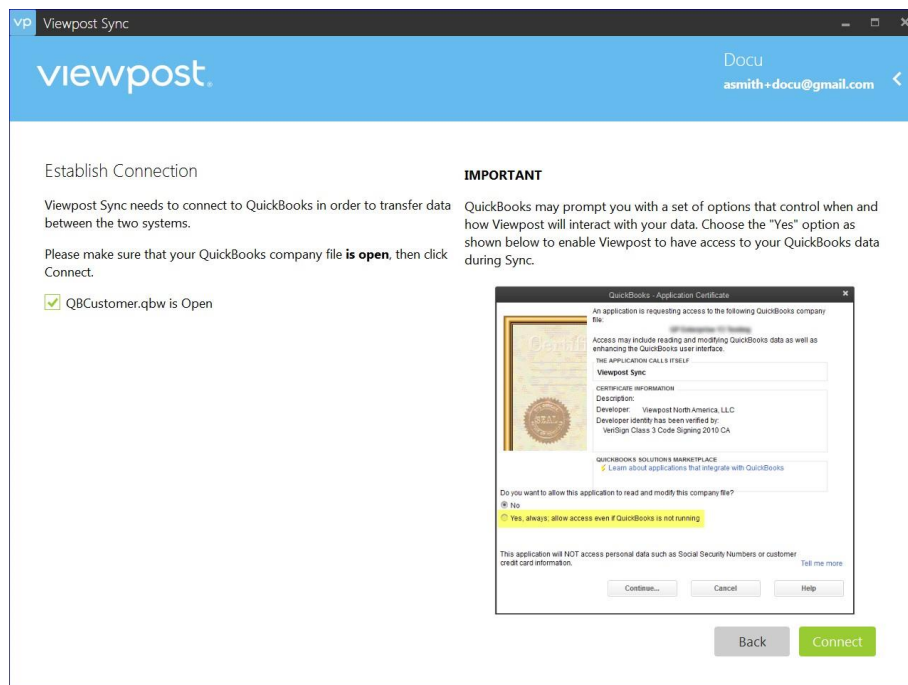


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To establish a connection between Viewpost Sync and QuickBooks, open QuickBooks with the company file you want to use with Viewpost Sync for QuickBooks. Confirm that the selected QuickBooks file is open and click on the checkbox.



Click *Connect* to open the QuickBooks application certificate screen. Select “Yes, always, allow access even if QuickBooks is not running”. If asked to select a user, please select an Admin user.



Note: If you select *No*, Viewpost Sync cannot access your QuickBooks data and will therefore not work.

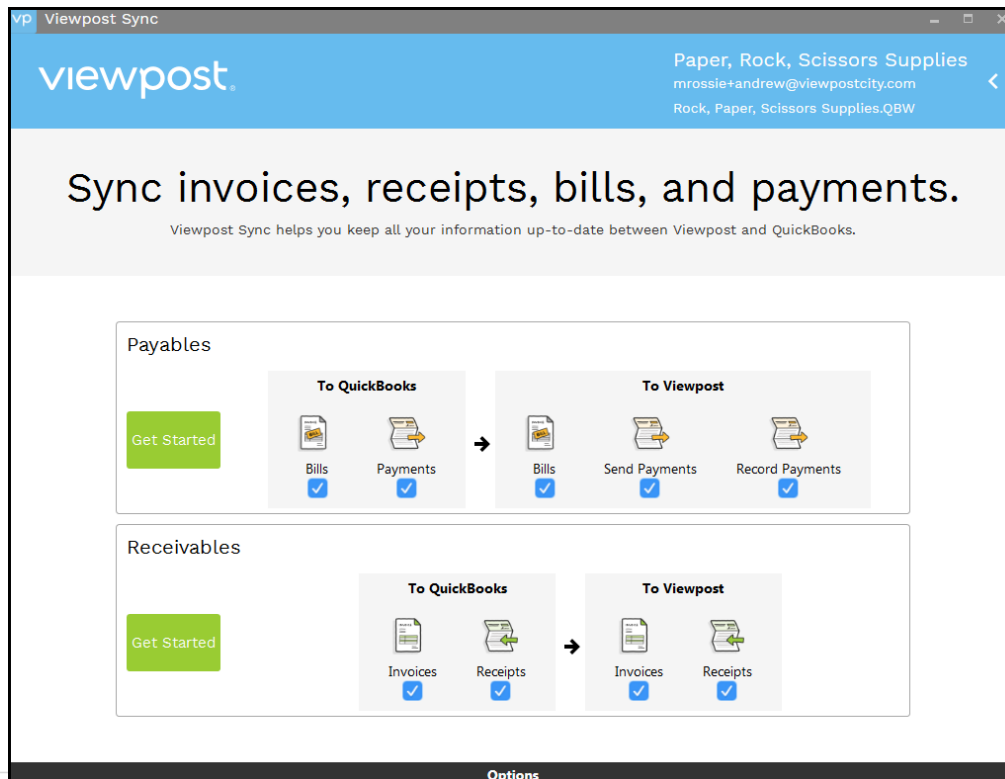


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Once access is enabled, go back to the Viewpost Sync for QuickBooks application. You will see the *Dashboard screen*, where you can select your next activity.

## Sync Dashboard



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There is a Payables and Receivable section of the Viewpost Sync Agent Dashboard. There are three ways that you can sync within each section.

1. Each section has a **Get Started** Easy button. Selecting the Get Started button will lead you through all the sync features in the correct order so that transactions are not duplicated between Viewpost and QuickBooks. By default, all features are selected with a check box.
2. You can un-check a box or boxes before clicking on the **Get Started** Easy button, which will skip that feature during the sync process.
3. You can click on a single icon directly and only sync that one feature (for example, you can click on "Send Payments"). The risk of clicking a single feature is that there may be transactions in the other sections that should be synced first.

### PAYABLES

#### To QuickBooks

This section sends Payable transactions from Viewpost to QuickBooks.

**Bills** – Bills which you create on Viewpost or which you receive from a Vendor through Viewpost and Approve on Viewpost will be listed for you to select to sync down to QuickBooks. Eligible Bills must meet the following criteria to be included in the list:

- Bills must have a status of "approved" in Viewpost
- Bills have not been acted upon or closed on Viewpost
- Bills have not already been received or entered into QuickBooks

**Payments** – Payments which you have created and sent from Viewpost's web application will be listed for you to select to sync down to QuickBooks. Eligible Web Payments must meet the following criteria to be included in the list:

- Payments are not already entered into QuickBooks
- Payments have been submitted and approved in Viewpost
- Payments are associated with an active QuickBooks bank accounts

#### To Viewpost

This section sends Payable transactions from QuickBooks to Viewpost.

**Bills** – Bills which have been created in QuickBooks and not previously synced will be listed for you to select which ones to sync to Viewpost.

**Send Payments** – Bill Payments or Checks created in QuickBooks with the status of "To Print" will be listed for you to select the ones to send through Viewpost. Selecting the payments and syncing will immediately send the checks (unless you have created a check approval process on Viewpost). To make payments eligible to be included in the list, ensure that:

- Payments are entered in QuickBooks
- Payment date is within the past 7 days
- Payments are Bill Payments or Checks (not payments via credit card)
- Payments have "Print Later" or "To Be Printed" selected
- Payments are associated with Active Bank accounts on Viewpost

**Record Payments** – Non-Viewpost payments recorded in QuickBooks that are associated with a Bill that has previously been synced to Viewpost will be listed to select for sync to Viewpost. Syncing these payments to Viewpost will close the Bill on Viewpost, thus preventing duplicate payment of the transaction. The criteria for listing the non-Viewpost payments are:

- Payments are entered in QuickBooks

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- Payments are applied to bills in QuickBooks that have previously been synced to Viewpost

### RECEIVABLES

#### To QuickBooks

This section sends Receivable transactions from Viewpost to QuickBooks.

**Invoices**-Invoices which you have created on Viewpost will be listed to sync into QuickBooks.

**Receipts**-Customer payments received through Viewpost will be synced down to QuickBooks and close the Receivable Invoice that was paid. The payment receipts on Viewpost will be listed for sync if:

- Payment receipts are not already recorded in QuickBooks
- Payment receipt has been applied to an invoice on Viewpost.

#### To Viewpost

This section sends Receivable transactions from QuickBooks to Viewpost.

**Invoices** -This feature sends invoices from QuickBooks to the customer through Viewpost. The invoices are sent immediately after sync.

In order for invoices to be sent to customers using Viewpost Sync for QuickBooks, each invoice must meet a few criteria:

- Invoice must be for an active customer
- Invoice date is within the past 180 days
- Invoice has not been paid or voided in QuickBooks
- Invoice has not already been sent to Viewpost
- Customer has a valid email address maintained in QuickBooks

**Receipts**-Non-Viewpost customer payment receipts recorded in QuickBooks will be listed to sync to Viewpost if:

- Payment receipts are not already synced to Viewpost
- Payments receipts are applied to invoices in QuickBooks that have previously been synced to Viewpost