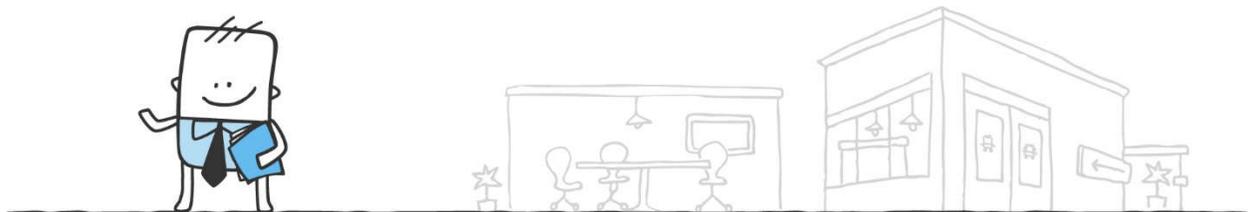




# GP Sync Agent Getting Started User Guide





# Contents

Introduction	3
What is Viewpost?	3
What is the Sync Agent for Dynamics GP?	3
1. Register your Viewpost account	4
2. Register/Verify your bank account on Viewpost	5
3. Setup Users	5
4. Dynamics GP Setup	6
4.1 Dynamics GP Vendor for Viewpost .....	6
4.2 Bank Account Requirements.....	7
4.3 Vendor Record Requirements .....	10
4.4 Customer Record Requirements.....	11
4.5 Purchasing Discount Account Setup .....	12
4.6 Sales Discount Account Setup .....	16
4.7 GP Company Viewpost Payment Receipt Remit-To Address Requirement .....	20
5. Contact Viewpost	21
5. General Information on the Sync Agent	23
6. System Requirements	23
7. Download and Install the Viewpost Sync Agent	24
8. Read the GP Sync Agent Guide	24



## Introduction

This guide provides the steps involved in downloading, installing, and setting up the Viewpost® Sync Agent for Microsoft Dynamics GP so that you can successfully sync your Microsoft Dynamics GP data with Viewpost.

## What is Viewpost?

Viewpost is an invoice presentment and payment platform. You can do a lot more with Viewpost, but let's just stick with the simple description for now. You can exchange invoices with your customers and vendors on Viewpost. You can pay your vendors using Viewpost. You can receive payment from your customers on Viewpost. Viewpost is essentially is a customer/vendor web portal that allows you to interact and share documents and make/receive payments with your trading partners.

## What is the Sync Agent for Dynamics GP?

If you didn't have an ERP application, you could even use Viewpost's capabilities straight from the web site. However, since you do have Microsoft Dynamics GP and we have the Sync Agent for Dynamics GP, it is much more efficient for you to use the Sync Agent for Dynamics GP to sync with Viewpost.

The Viewpost Sync Agent is an application that you install on your computer. Typically, the Sync Agent is installed on the same computer where Dynamics GP is installed. The Viewpost Sync Agent's job is to sync information to/from Dynamics GP and Viewpost. You can sync your vendors, customers, invoices, payments, from Dynamics GP using the Sync Agent. Using the Sync Agent, this information will integrate directly with Dynamics GP without any manual data entry saving time and eliminating data entry errors. No more printing checks and stuffing envelopes.

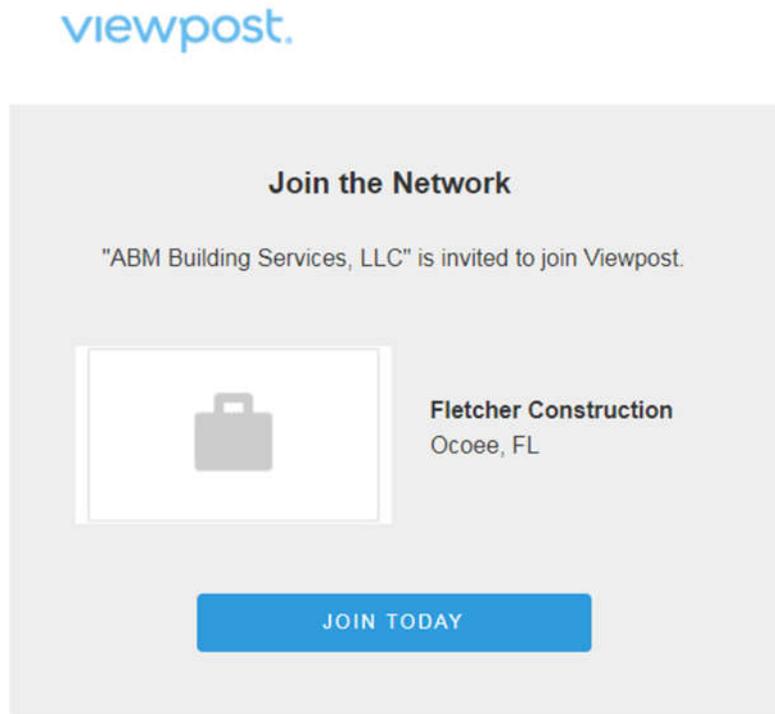
To get your Sync Agent up and running, you will need to complete the following steps:

1. Register your Viewpost.com account.
2. Register and verify one or more of your bank accounts on Viewpost.com to enable the sending and receiving of digital payments.
3. Complete the Dynamics GP Setup.
4. Download and Install the Viewpost Sync Agent.
5. Read the Sync Agent guide to learn how Syncing works and then begin using the Viewpost Sync Agent.



## 1. Register your Viewpost account

If you received an invitation email, then click on the blue button and follow the instructions. The clip below shows an example of an invitation email.



Why join? Viewpost enables you to send electronic invoices, track their status, and receive payments by electronic deposit. You get convenient access to payment history and remittance information, plus you can send payments to your suppliers from anywhere, anytime.

The Viewpost Team  
[support.viewpost.com](mailto:support.viewpost.com)

Another option to register your Viewpost account would be to directly go to [www.viewpost.com](http://www.viewpost.com) and click the “Join” button in the top right-hand corner of the page.



## 2. Register/Verify your bank account on Viewpost

To make payments to your vendors or receive payments from your customers, you will need to add/register at least one of your bank accounts as a payment method on Viewpost.

For assistance in registering your bank account, please refer to Help article. [Creating a Bank Account](#)

## 3. Setup Users

Multiple users with specific permissions assigned in Viewpost can be created to limit access to certain areas of Viewpost. A selection of permissions can be saved as a group which then can be assigned to one or multiple users.

For assistance with adding users, permissions and groups, refer to the Help articles below.

[Adding a User](#)

[User Permissions](#)

Permissions required for Syncing

	Sync AR	Sync AP	Send Payments
Approve Bills		✓	✓
Create Check			✓
Manage Connections	✓	✓	✓
Manage Contacts	✓	✓	✓
Modify Bills		✓	✓
Unvoid Checks		✓	✓
Unvoid Invoices	✓	✓	✓
Void Checks		✓	✓
Void Invoices	✓	✓	✓
Modify Invoices	✓		
Sign Check (including VPX™)			✓



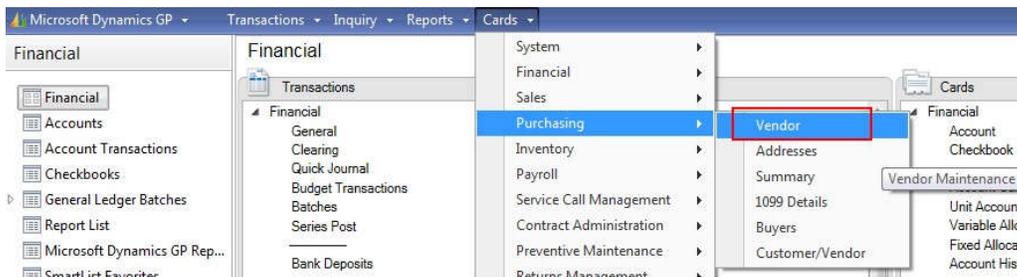
## 4. Dynamics GP Setup

The GP setup outlined in the subsections below must be satisfied for all Dynamics GP companies that you intend to use with the Sync Agent.

### 4.1 Dynamics GP Vendor for Viewpost

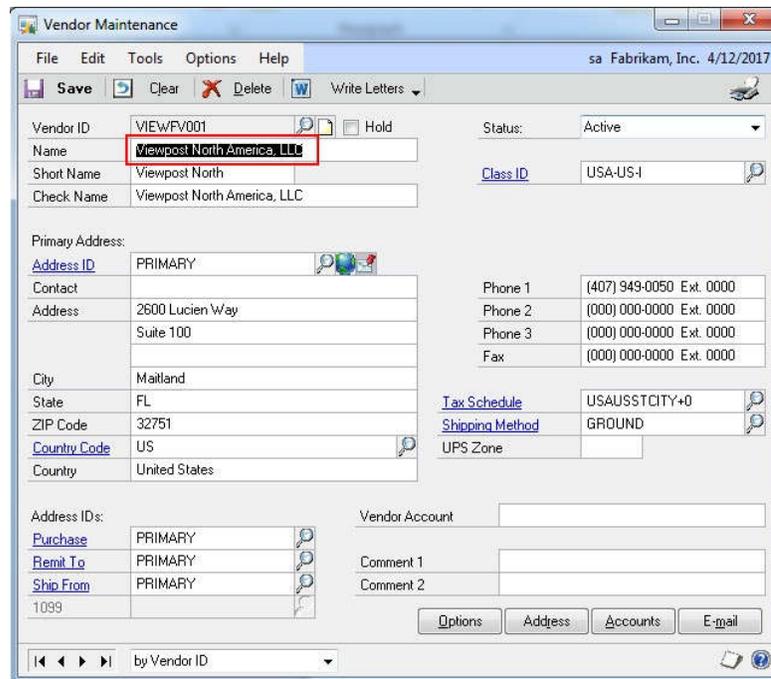
All company accounts in Viewpost have *Viewpost North America, LLC* automatically set up as a connected vendor. To enable easy monthly billing and payments for selected services, the Sync Agent requires that you also create a matching Viewpost vendor in Microsoft Dynamics. To add the Viewpost vendor in Dynamics GP:

#### Navigation



Create a Dynamics GP vendor record similar to what is shown below.

- The Vendor ID “VIEWFV001” used in this example does not need to be the Vendor ID you use. You can use any valid Vendor ID.
- The Vendor Name must be “Viewpost North America, LLC” as shown below.
- The Vendor Name is not case-sensitive. So, “VIEWPOST NORTH AMERICA, LLC”, “viewpost north America, llc”, and “VIEwpoSt nOrth AmericA, LLC” are all valid. However, “Viewpost North America”, “Viewpost North America llc”, and “Viewpost North America, Inc.” are all **not** valid.

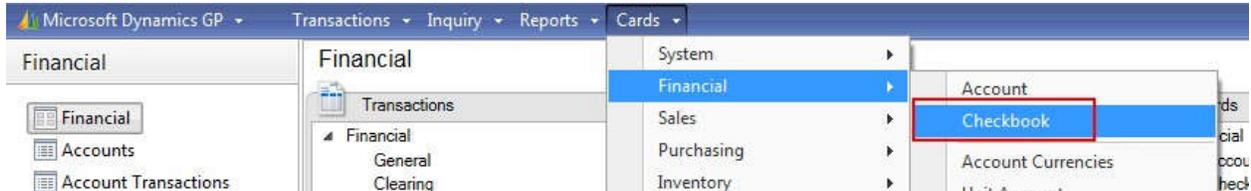




## 4.2 Bank Account Requirements

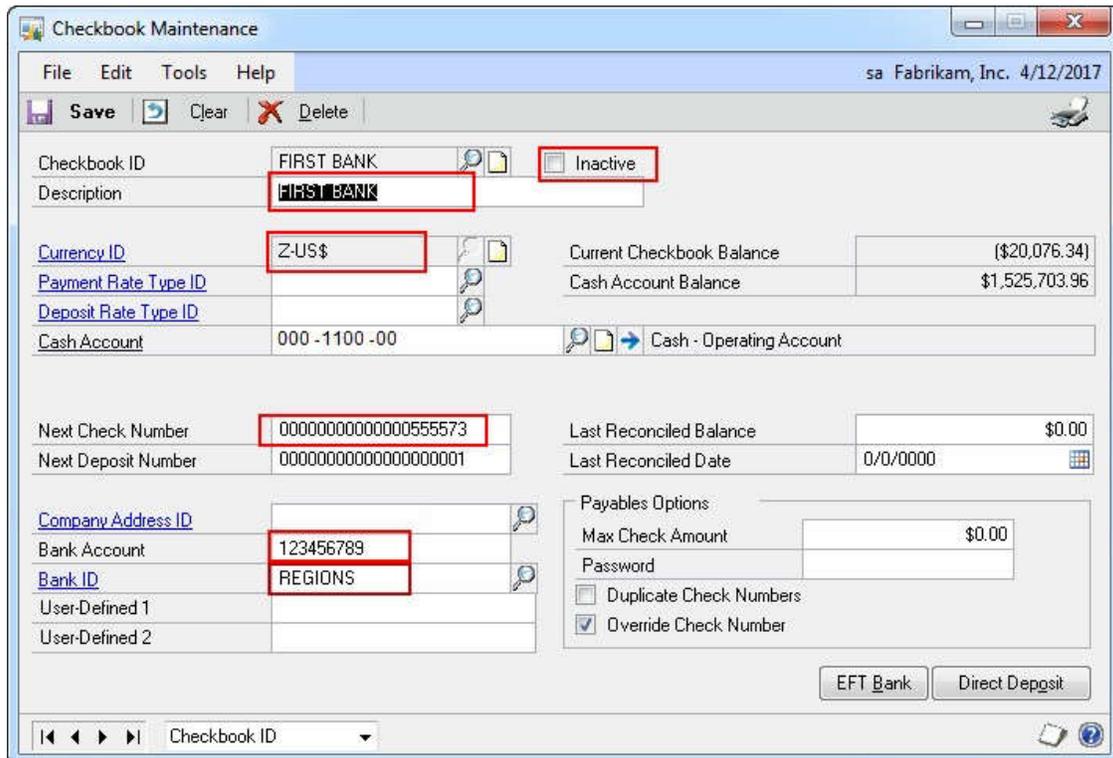
If you registered a bank account on Viewpost in Step 2, then you should have one and only one matching Checkbook in Dynamics GP representative of the bank account you registered on Viewpost. Viewpost will use the Bank Account number from the Checkbook Maintenance card and the Transit number (the bank account’s routing number) from the checkbook’s Bank Maintenance card to link your Dynamics GP Checkbook with the payment method you registered with Viewpost in Step 1. You can create multiple bank accounts in Viewpost – they each need to link to a check book that you have created in GP.

### Navigation



The Dynamics GP Checkbook below is an example of a Checkbook that could be used with Viewpost as:

- The Checkbook is active.
- The Checkbook’s Description field is completed.
- The Currency ID associated with the Checkbook has an ISO currency code of “USD”.
- The Checkbook’s “Next Check Number” is an integer that is less than 10 digits. In the example below, the Next Check Number is valid because 555573 is an integer and it is only 6 digits in length.
- The Bank Account number is a valid bank account number.
- A valid Bank ID is assigned to the Checkbook.

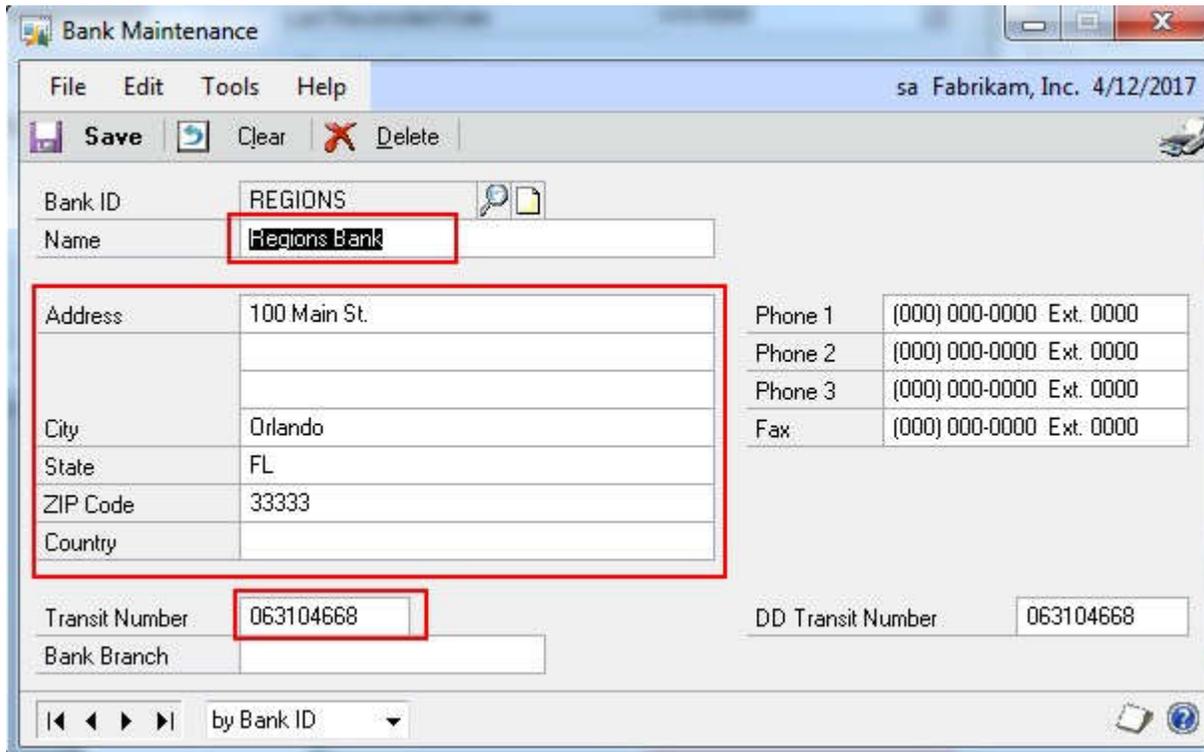
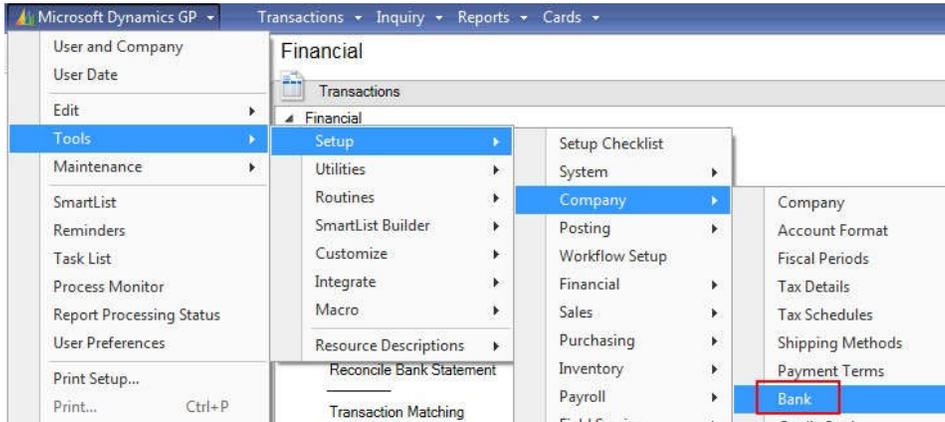




The Dynamics GP Bank ID below is an example of a Dynamics GP Bank that could be used with Viewpost because:

- The Bank has the Name field completed.
- The Bank has a valid US address.
- The Bank has a valid, 9-digit Transit number (the bank account’s routing number) to a US bank.
- Note that, if the Country field is blank, Viewpost will assume the Country is “USA”.

### Navigation

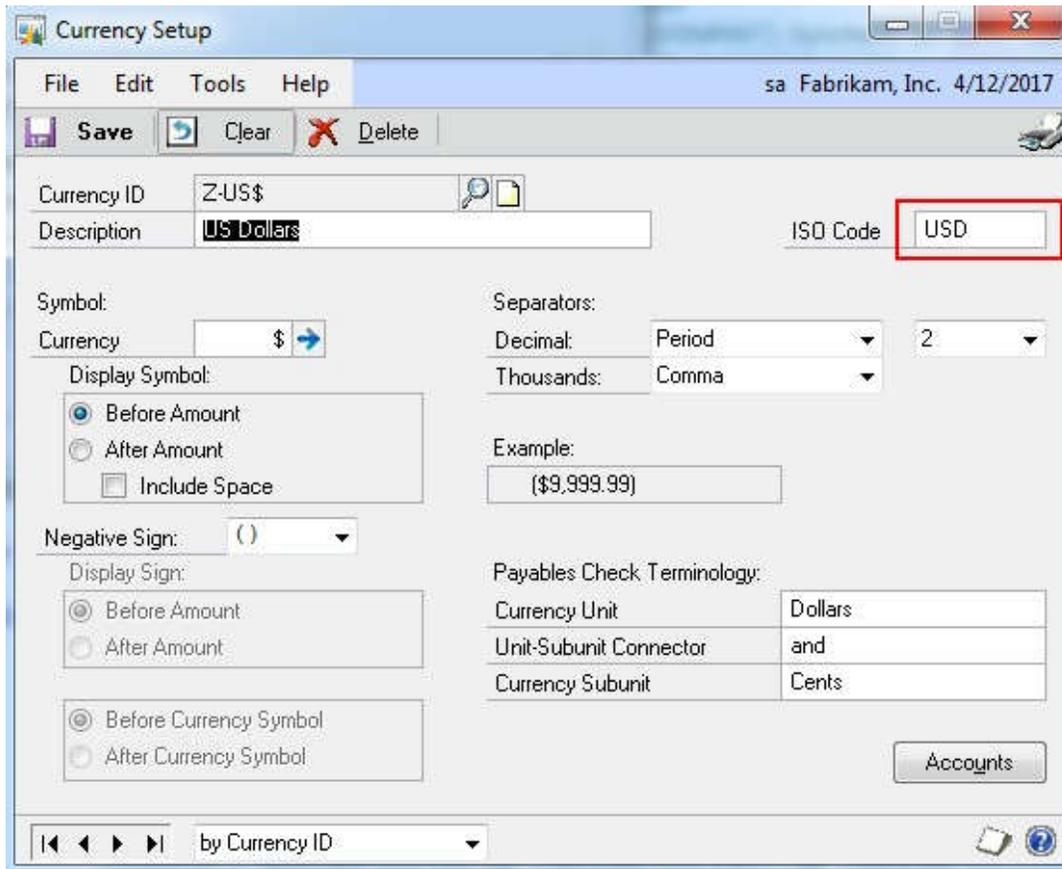
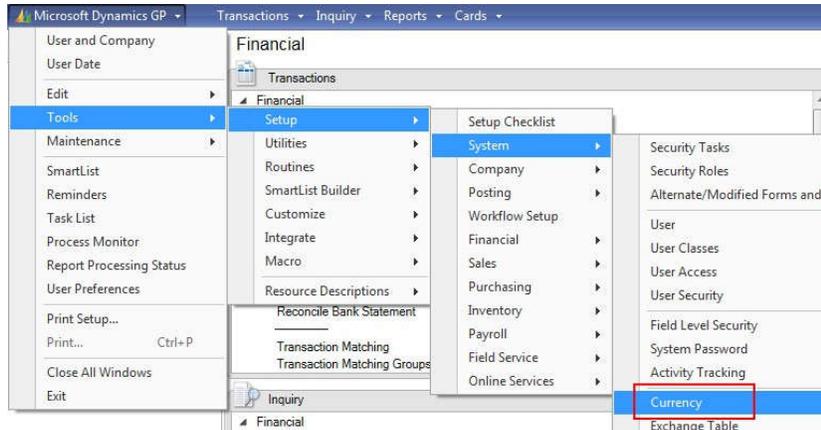




The Dynamics GP Currency ID below is an example of a Dynamics GP Currency that could be used by a Dynamics GP checkbook setup as a Viewpost payment method because the ISO Code used by the Currency is “USD”.

Note: If the ISO code is not specified for the Dynamics GP Currency ID, then Viewpost will use “USD” as the default currency for all transactions that you sync with Viewpost.

### Navigation

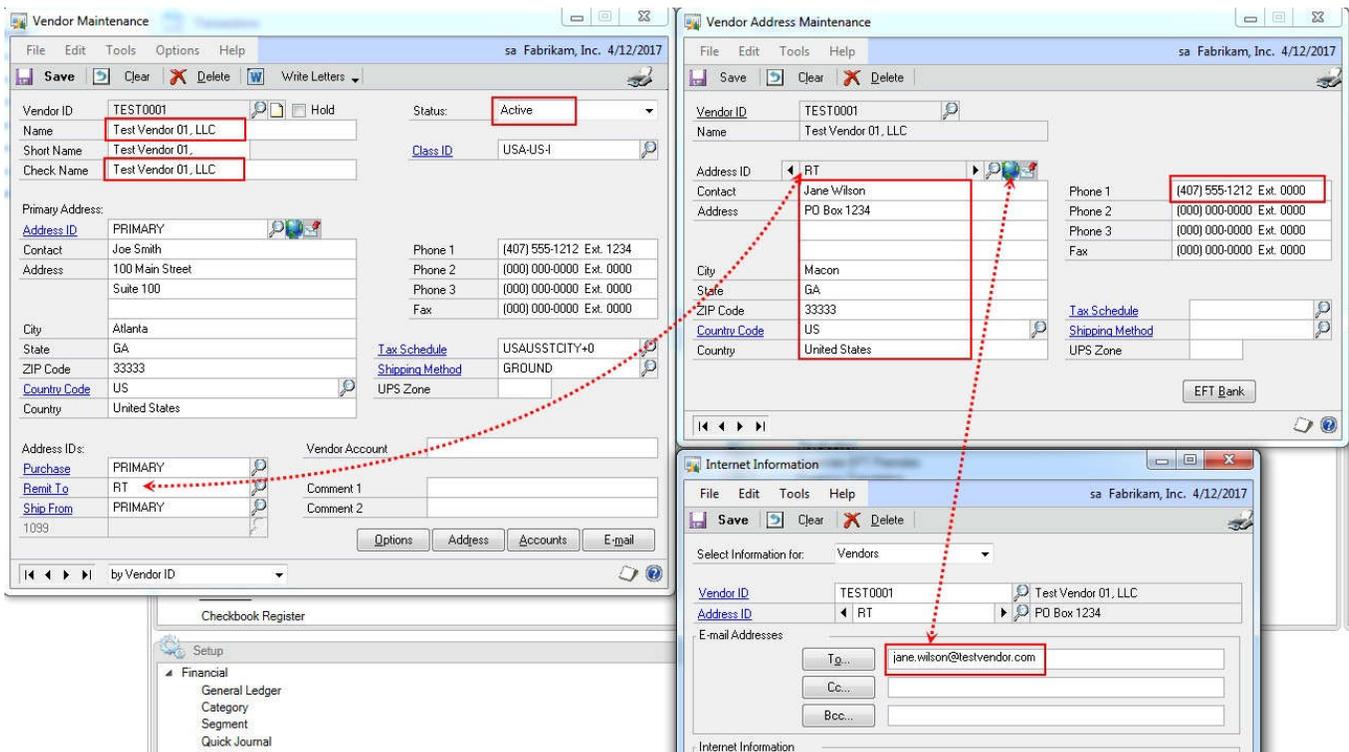




### 4.3 Vendor Record Requirements

The example below depicts a Dynamics GP Vendor.

- The Sync Agent is only concerned with certain fields (these fields are encased in the red squares in the clip below).
- Note that, in this example, the address information for the Address ID “PRIMARY” will **not** be sync’d to Viewpost. Only the address information for the Remit To address code (“RT” in this example) will be sync’d to Viewpost.
- Only the first email address in the “To...” email address field from the Internet Information window for the Remit To address code will sync to Viewpost.
- Note that the address is a valid US address. The Sync Agent will reject Viewpost Payment Commands that do not have a valid US address.
- The State field can be either a valid US 2-digit state code or the spelling of the state (i.e. “GA” and “Georgia” are both acceptable in this example).
- Note that, if the Country field is blank, Viewpost will assume the Country is “USA”.

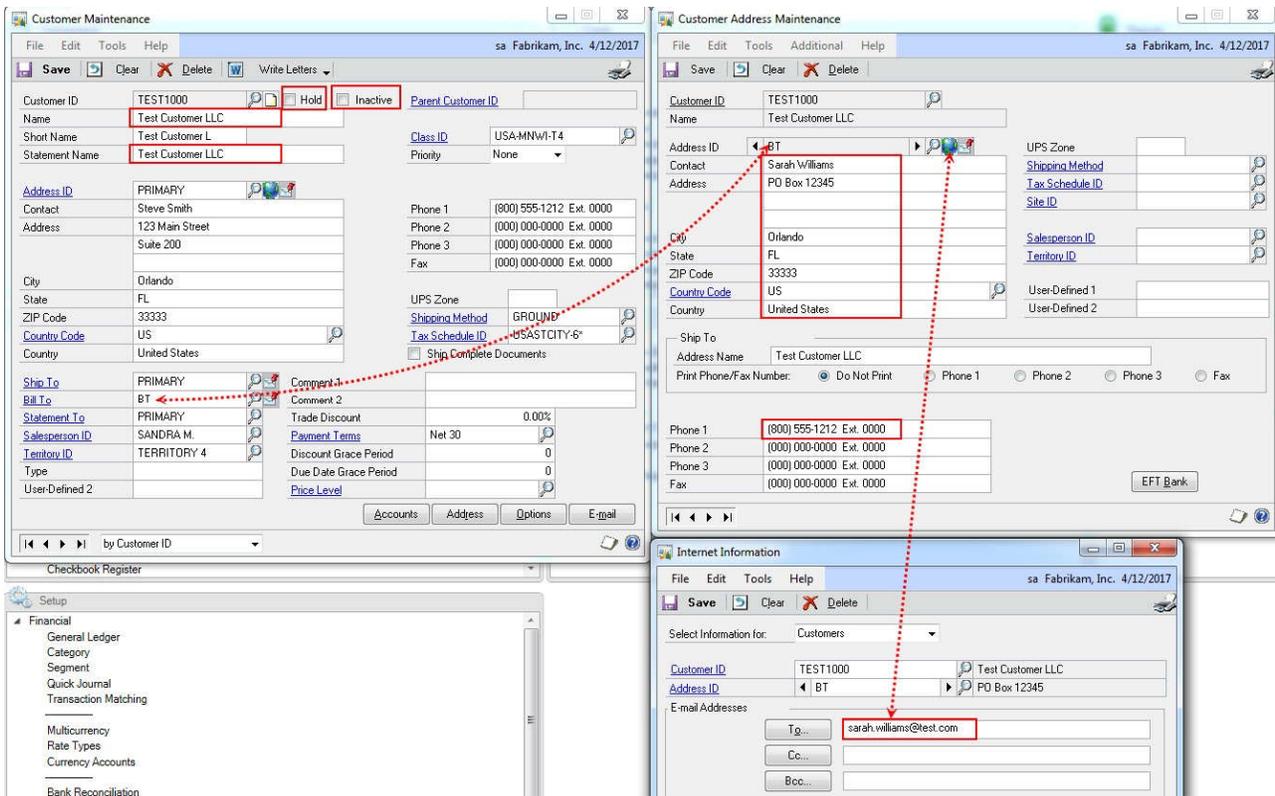




### 4.4 Customer Record Requirements

The example below depicts a Dynamics GP Customer.

- The Sync Agent is only concerned with certain fields (these fields are encased in the red squares in the clip below).
- Note that the address information for the Address ID “PRIMARY” will **not** be sync’d to Viewpost. Only the address information for the Bill To address code (“BT” in this example) will be sync’d to Viewpost.
- Only the first email address in the “To...” email address field from the Internet Information window for the Bill To address code will sync to Viewpost. Please make sure to review and update email addresses for Customers you want to invoice via Viewpost.
- The State field can be either a valid US 2-digit state code or the spelling of the state (i.e. “GA” and “Georgia” are both acceptable in this example).
- Note that, if the Country field is blank, Viewpost will assume the Country is “USA”.



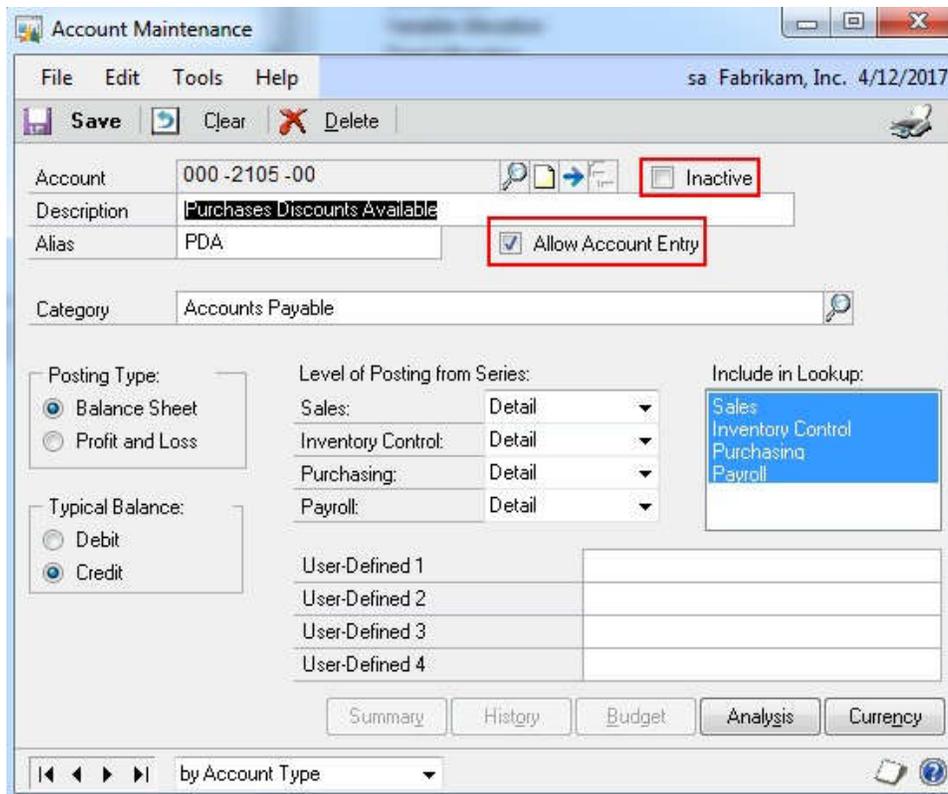
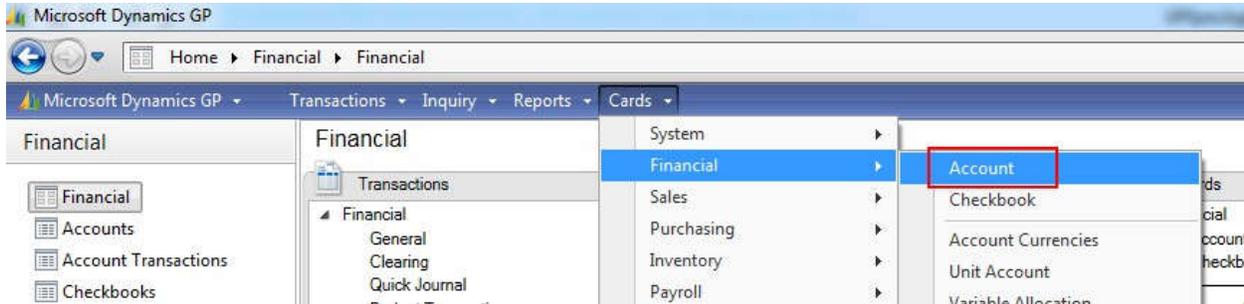


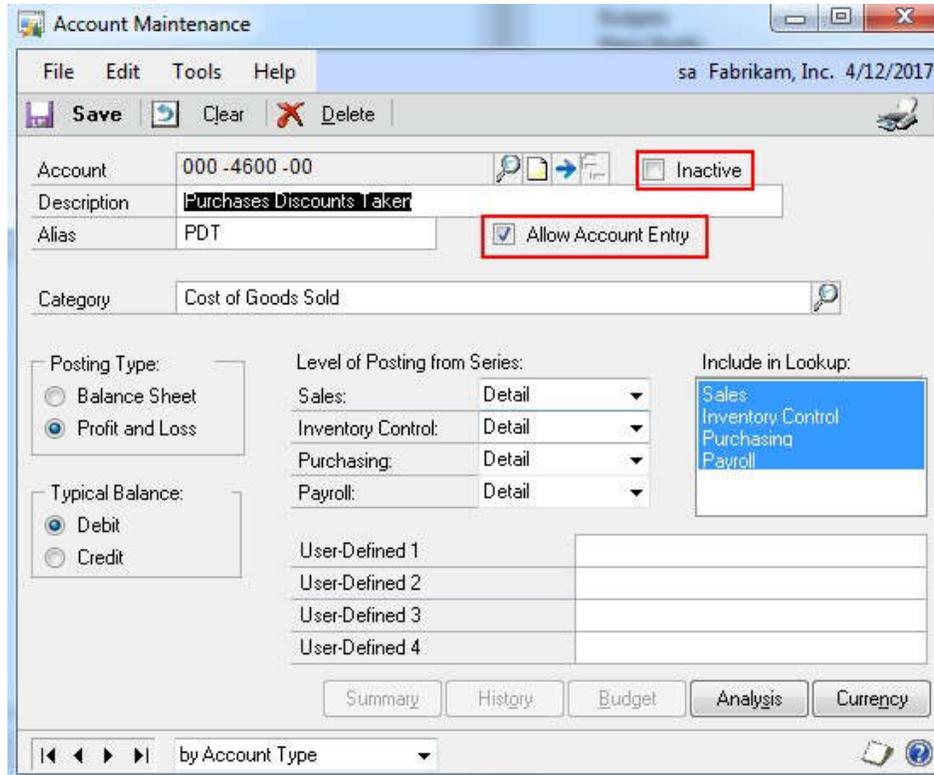
### 4.5 Purchasing Discount Account Setup

The Sync Agent requires that valid, active posting GL accounts that allow account entry are assigned to the Discounts Available and Discounts Taken accounts in Posting Accounts Setup for the Purchasing series.

The example below shows the Discounts Available and Discounts Taken GL accounts in the Dynamics GP sample company.

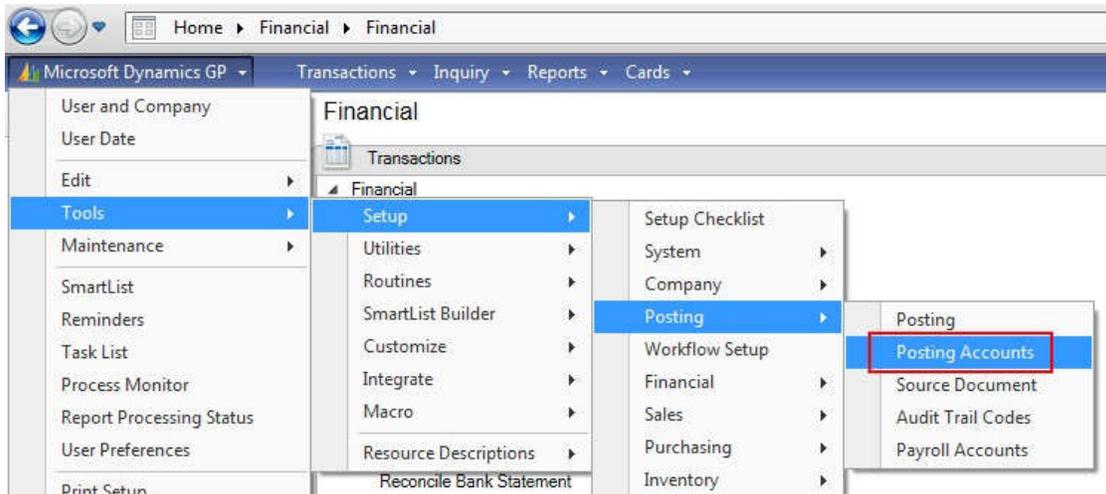
#### Navigation





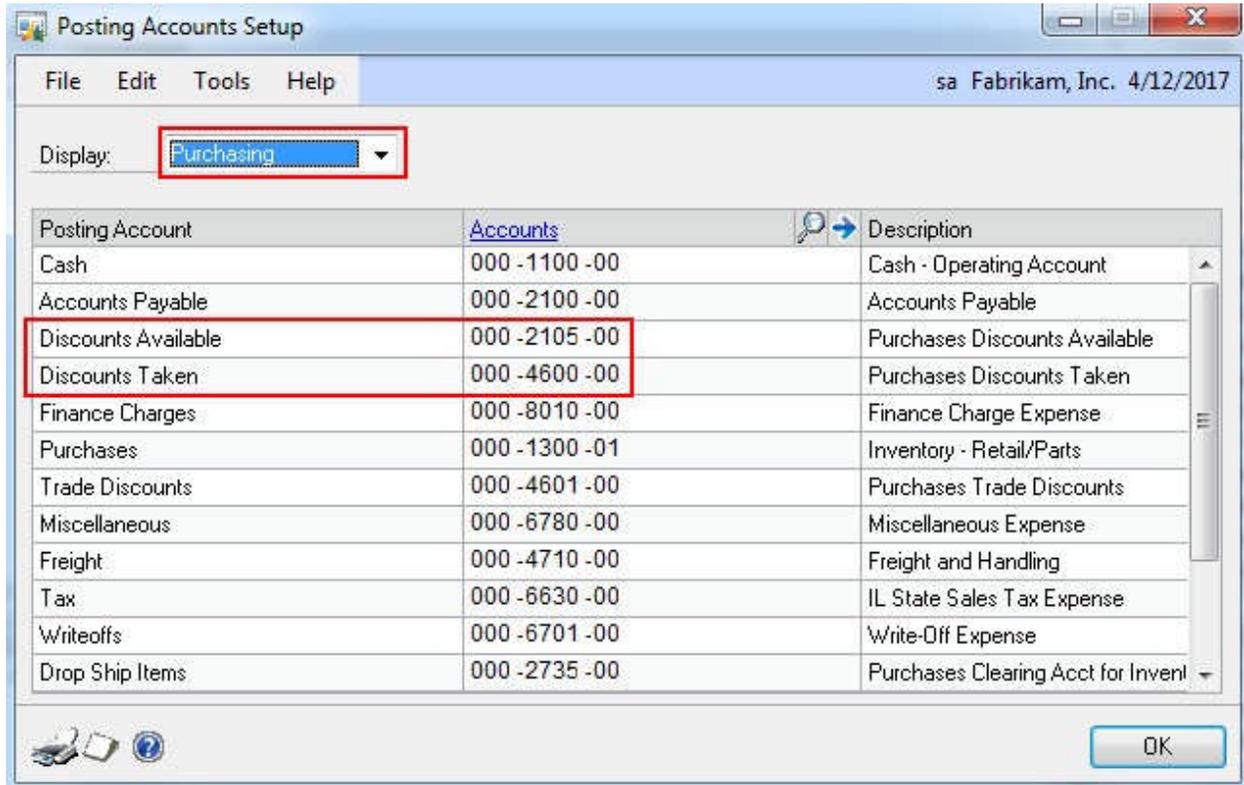
The example below shows how the Discounts Available and Discounts Taken GL accounts are assigned in Posting Accounts Setup in the Dynamics GP sample company.

### Navigation





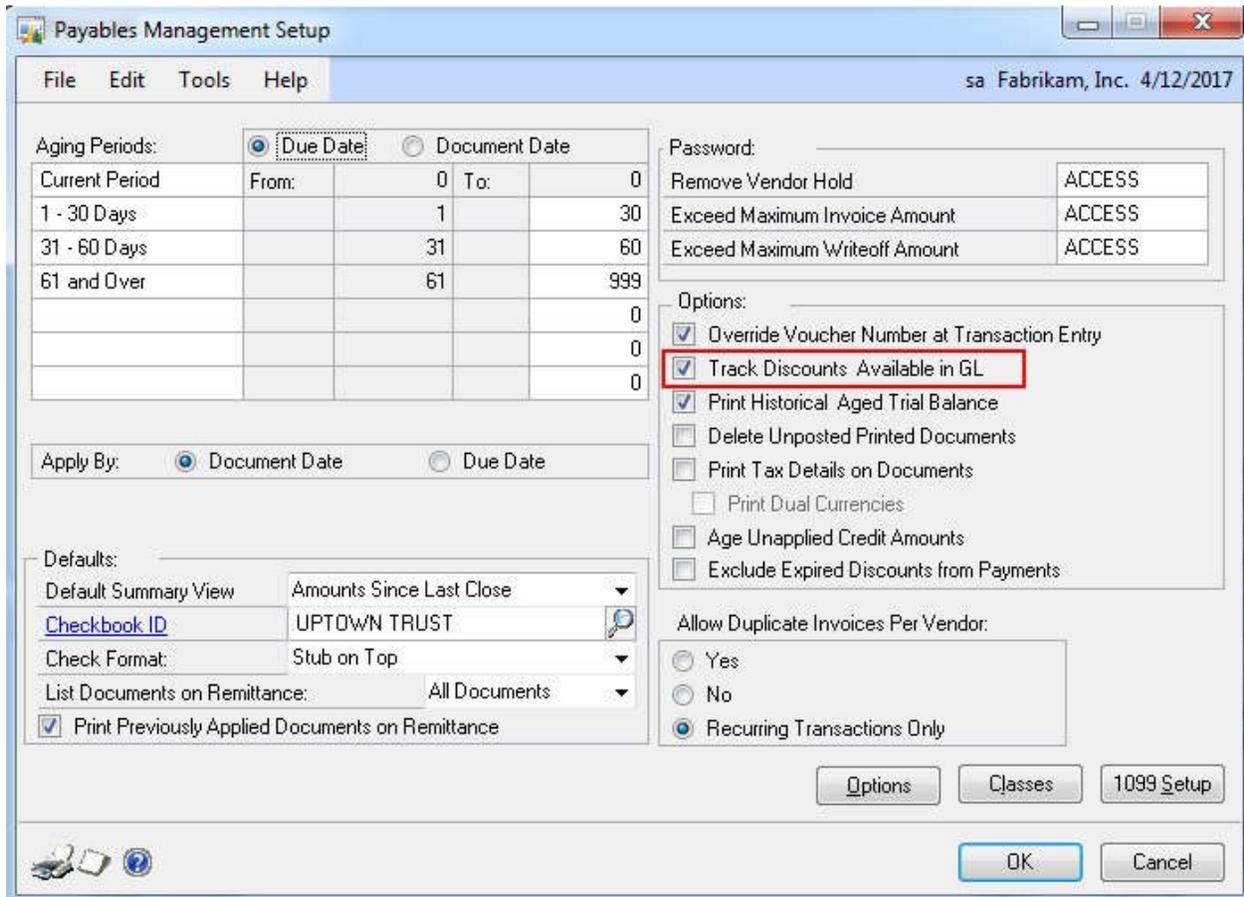
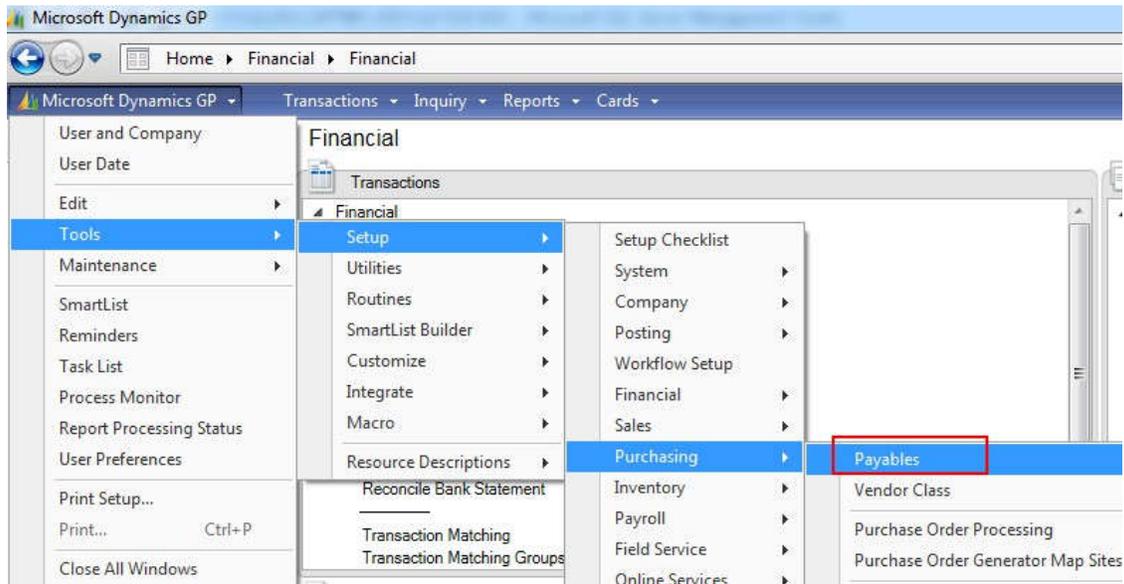
Note that the Display drop down box is set to Purchasing.



Both Discounts Available and Discounts Taken are required by the Viewpost Sync Agent but note that the Discounts Available GL account will only be used by Dynamics GP and the Sync Agent if "Track Discounts Available in GL" is selected in Payables Management Setup (see clips below).



### Navigation



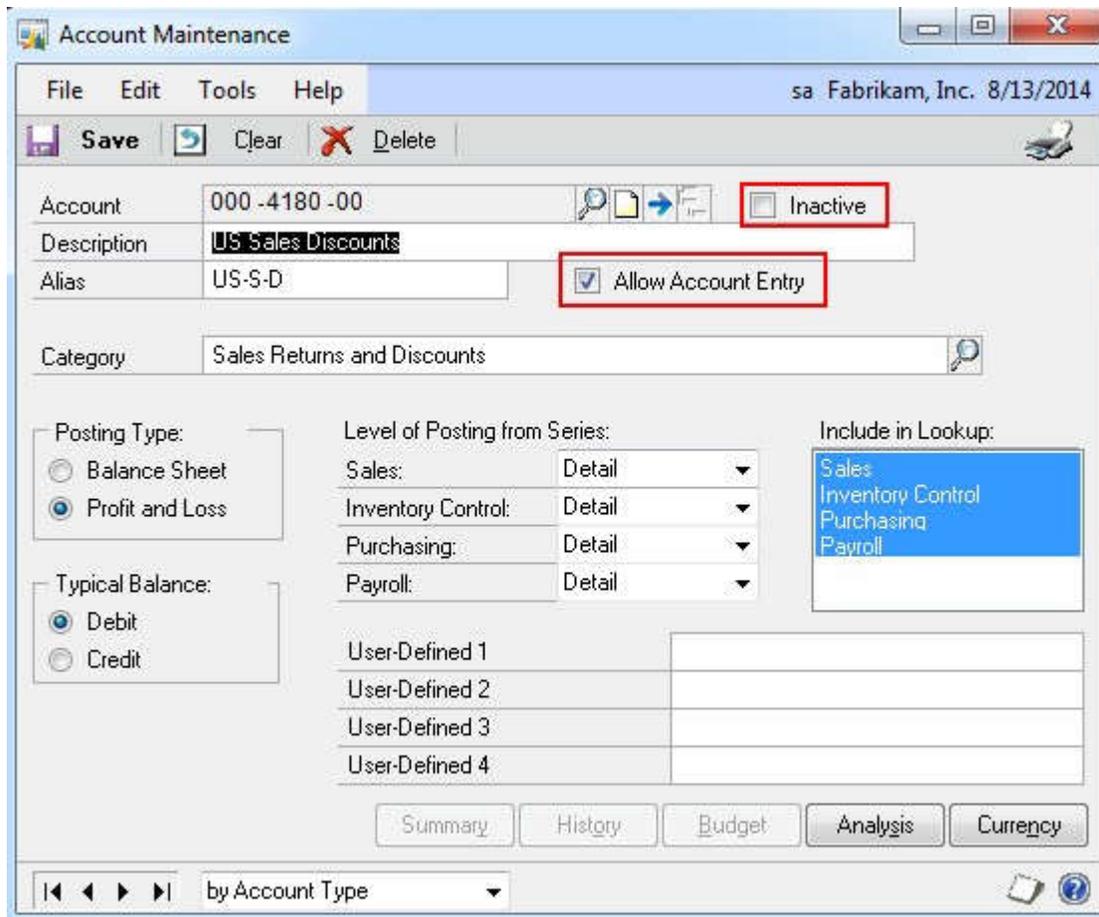
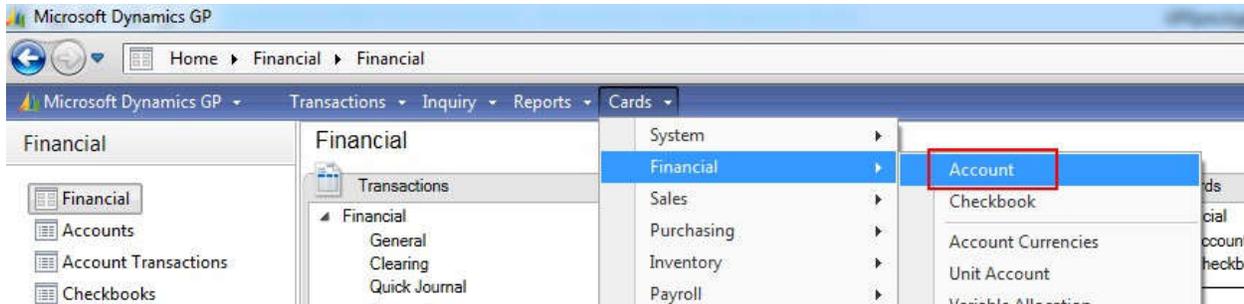


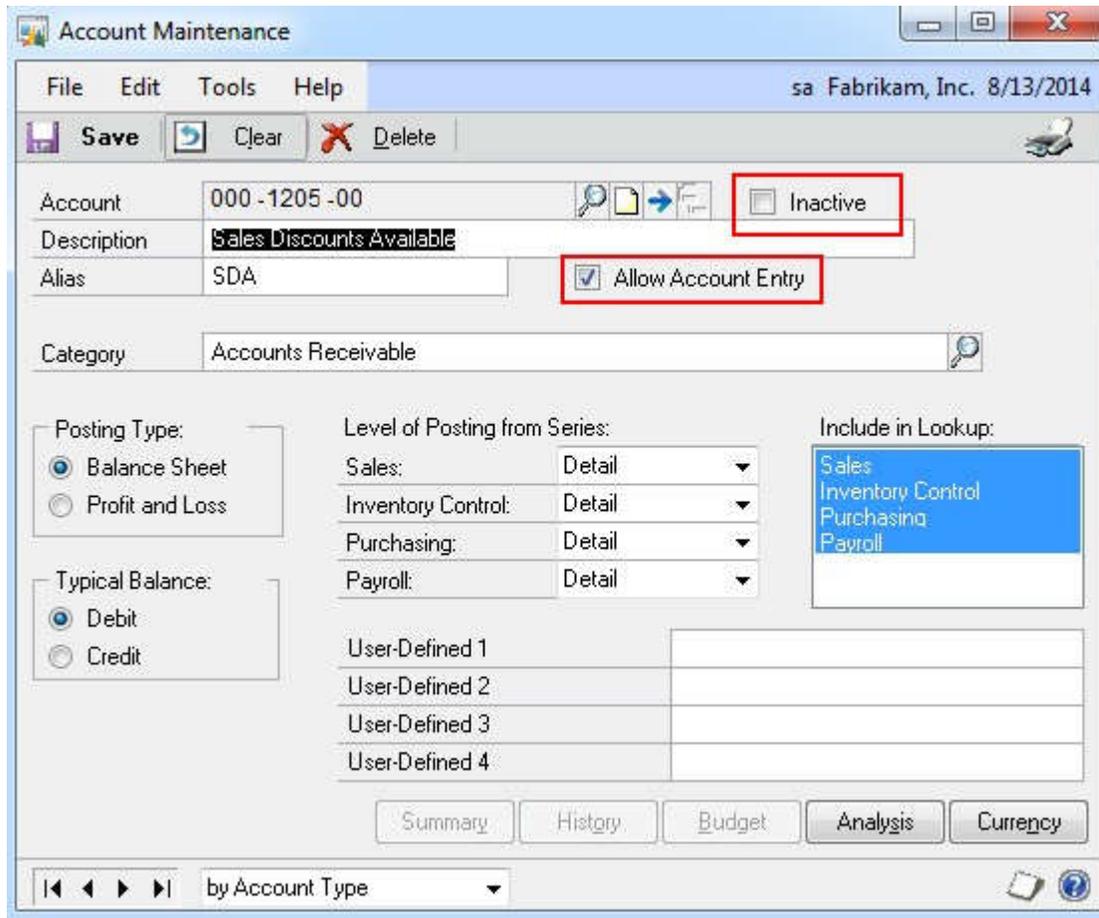
### 4.6 Sales Discount Account Setup

The Sync Agent requires that valid, active posting GL accounts that allow account entry are assigned to the Terms Discounts Taken and Terms Discounts Available accounts in Posting Accounts Setup for the Sales series.

The example below shows the Terms Discounts Taken and Terms Discounts Available GL accounts in the Dynamics GP sample company.

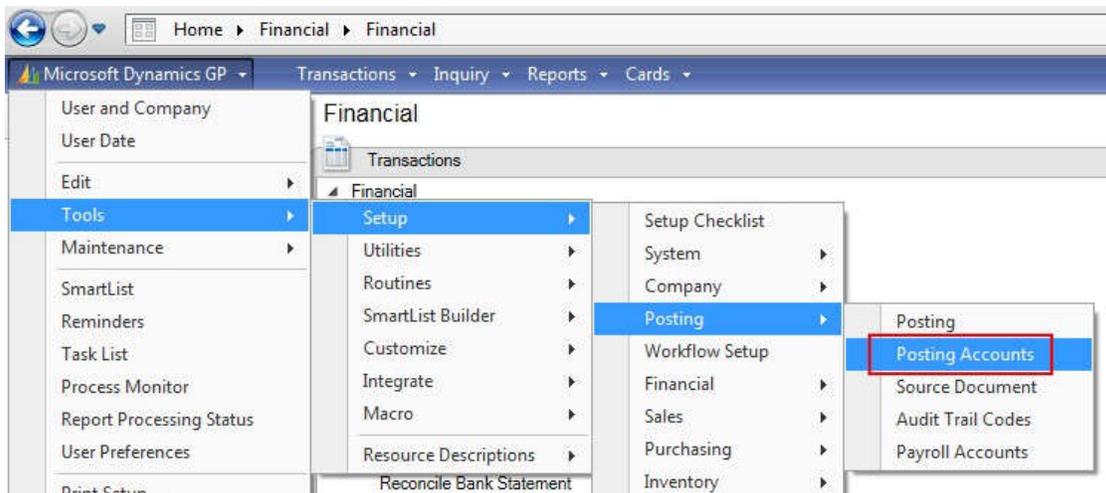
#### Navigation





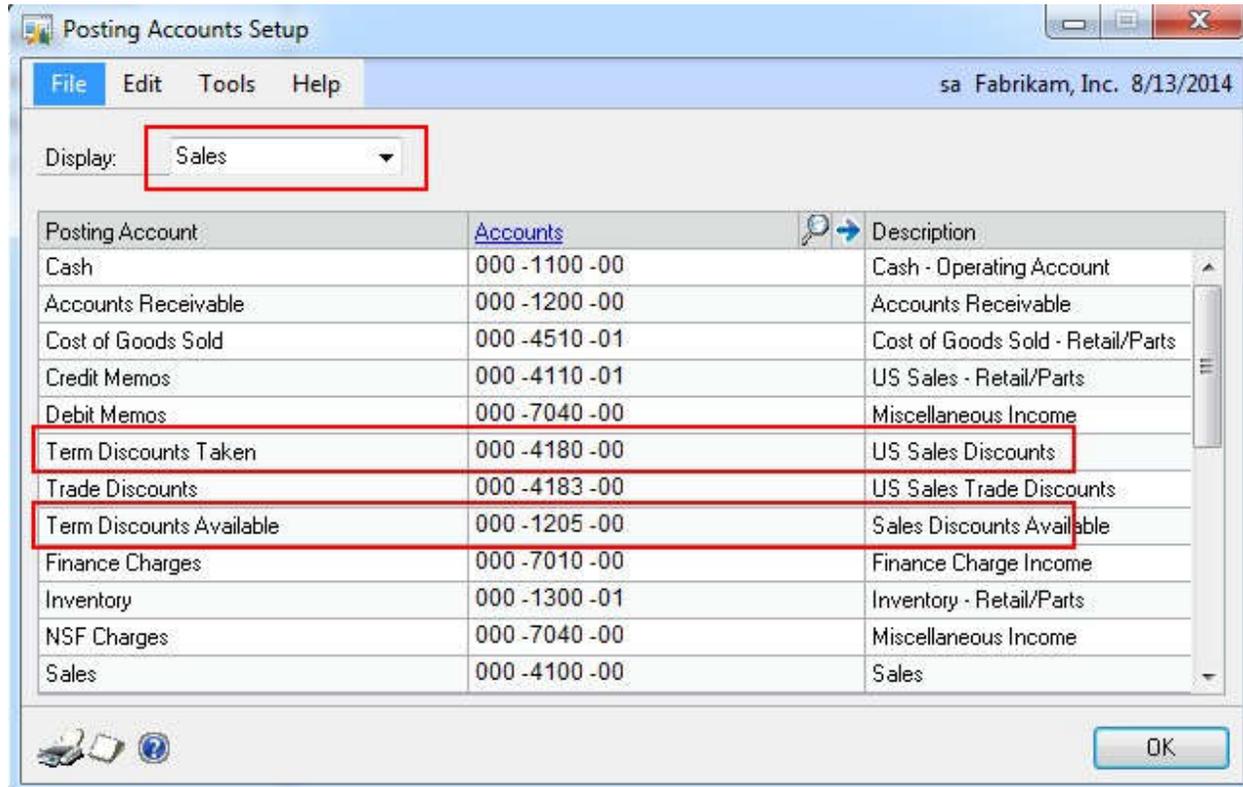
The example below shows how the Discounts Available and Discounts Taken GL accounts are assigned in Posting Accounts Setup in the Dynamics GP sample company.

### Navigation



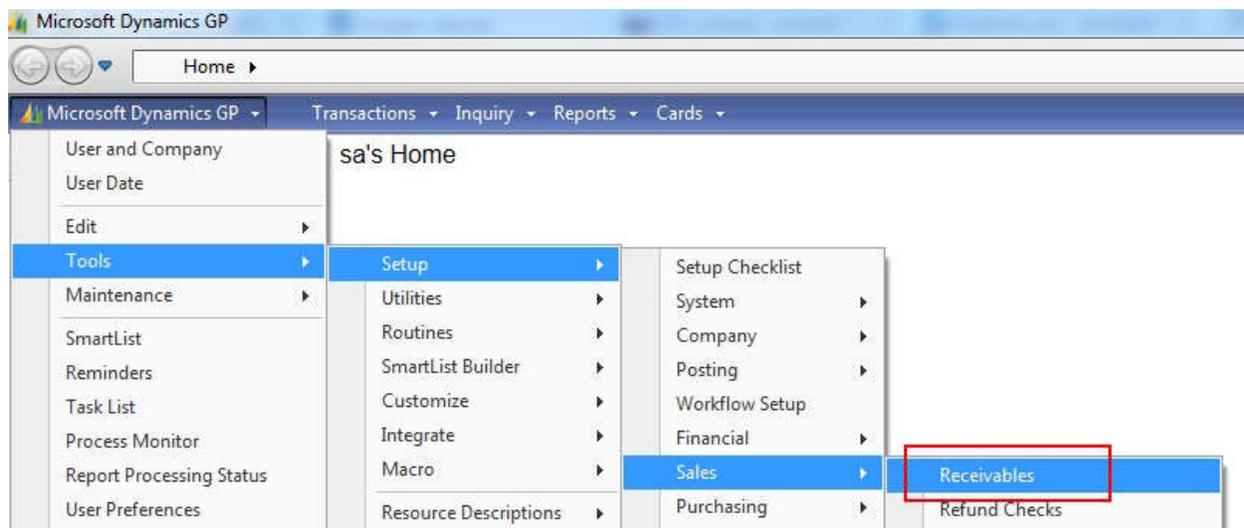


Note that the Display drop down box is set to Sales.



Both Terms Discounts Taken and Terms Discounts Available are required by the Viewpost Sync Agent. Note that the Discounts Available GL account will only be used by Dynamics GP and the Sync Agent if "Track Discounts Available in GL" is selected in Receivables Management Setup (see clips below).

### Navigation





Receivables Management Setup

File Edit Tools Help sa Fabrikam, Inc. 8/13/2014

Aging Periods  Due Date  Document Date

	From:	To:
Current	0	30
31 - 60 Days	31	60
61 - 90 Days	61	90
91 - 120 Days	91	120
121 - 150 Days	121	150
151 - 180 Days	151	180
181 and Over	181	999

Options

- Track Discounts Available in GL
- Print Historical Aged Trial Balance
- Delete Unposted Printed Documents
- Compound Finance Charge
- Pay Commissions After Invoice Paid
- Reprint Statements
- Print Tax Details on Documents
- Print Dual Currencies
- Auto Apply to Finance Charges First
- Age Unapplied Credit Amounts

Defaults

NSF Charge	\$15.00
Checkbook ID	UPTOWN TRUST
Price Level	RETAIL
Document Format	Blank Paper
Default Summary View	Amounts Since Last Close

Passwords

Exceed Credit Limit	ACCESS
Remove Customer Hold	
Exceed Maximum Writeoffs	ACCESS
Waive Finance Charge	ACCESS

Apply by

Due Date  Document Number

Options Classes

OK Cancel

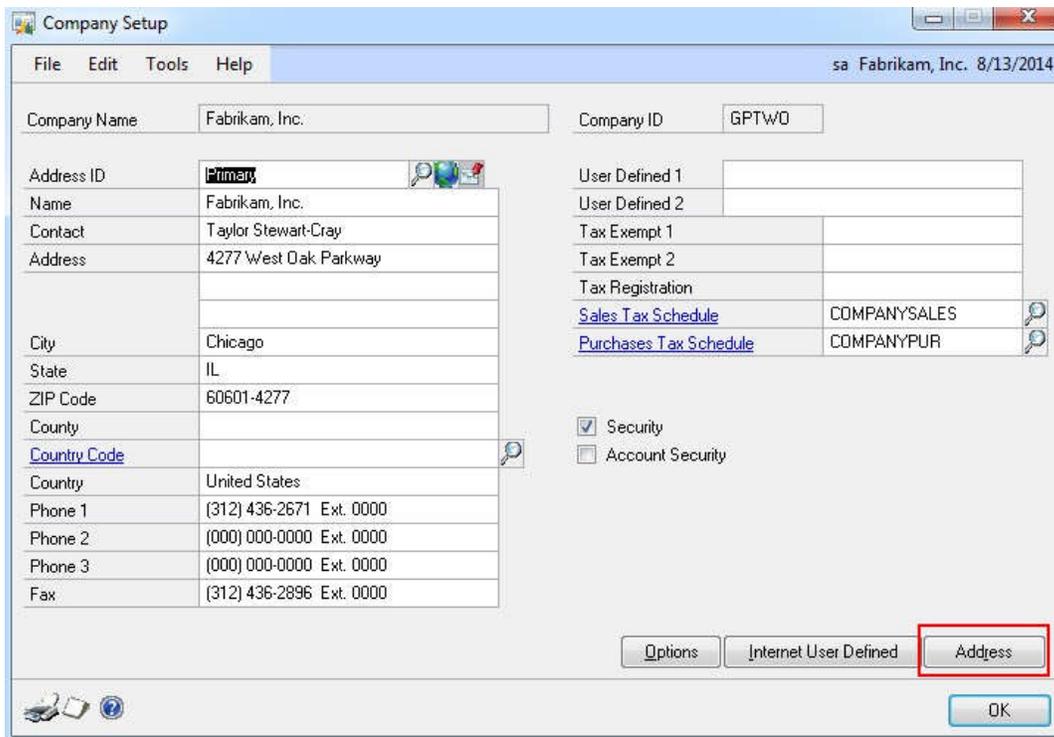
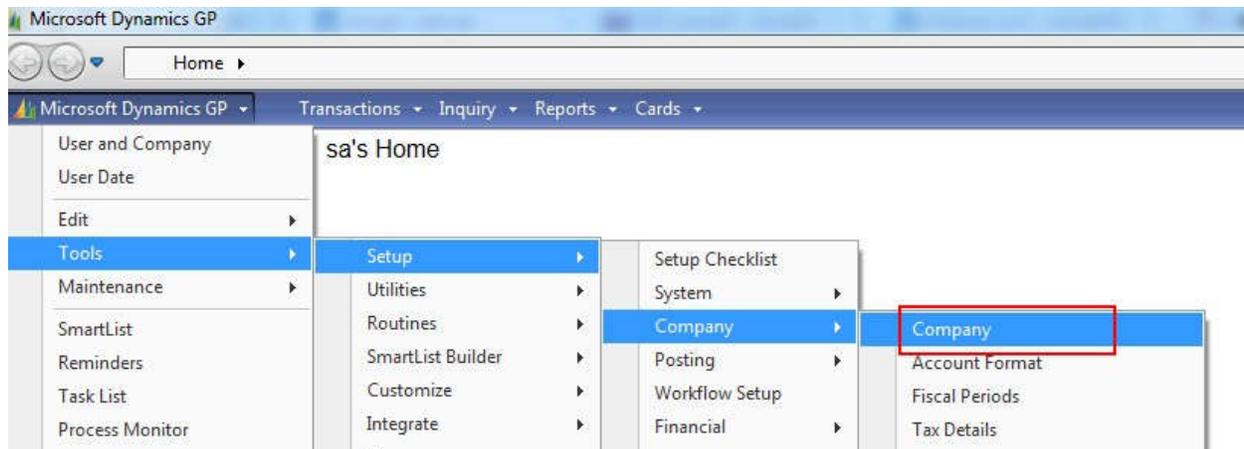


### 4.7 GP Company Viewpost Payment Receipt Remit-To Address Requirement

When you send a Viewpost-connected partner a receivable invoice through Viewpost, Viewpost will send payment receipt remit-to address information as part of your receivable invoice. In order to send your remit-to address information as part of your receivable invoice, a "VPREMITTO" Address ID must be created in Company Address Setup. The "VPREMITTO" Address ID should reflect where, if your trading partner were to send payment to you outside of Viewpost, they should send the payment.

The example below shows the "VPREMITTO" Address ID setup in the Dynamics GP sample company.

#### Navigation

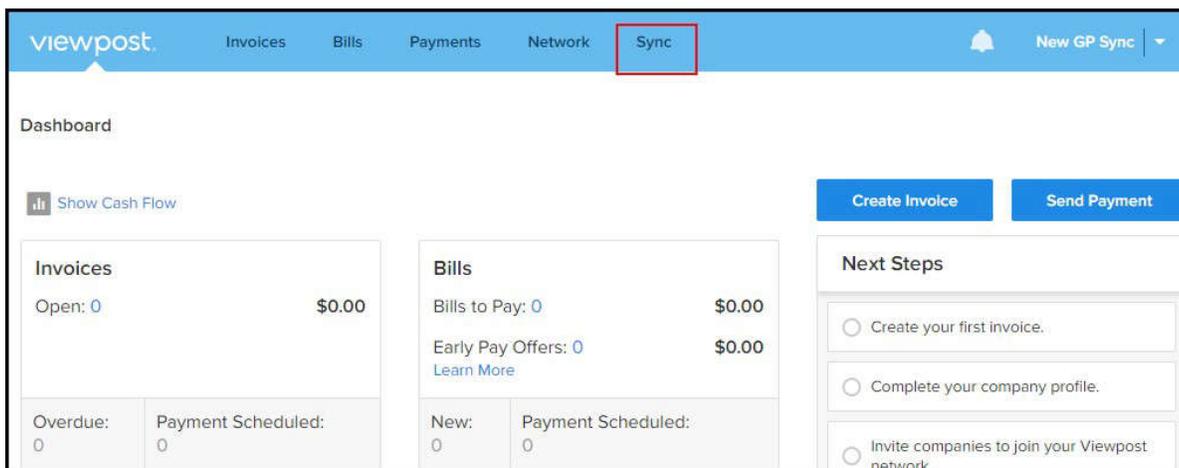




## 5. Contact Viewpost

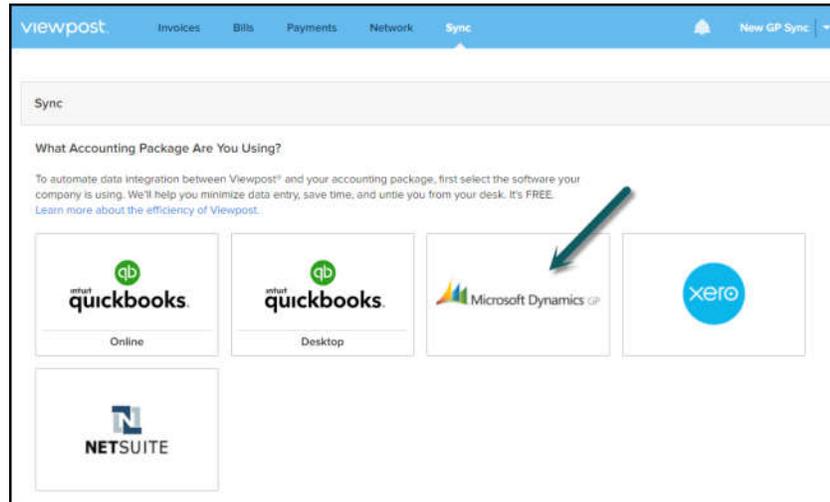
To download and install the Viewpost Sync Agent for Microsoft Dynamics GP, please contact our company.

- Launch your browser and go to Viewpost.com (Viewpost works best with Google Chrome or Firefox).
- Sign into Viewpost.com using the account (username and password) that you have already registered.
- Click on “Sync” at the top of the page.





Click the Microsoft Dynamics GP tile.



Click the **Contact Me** button.

viewpost. Invoices Bills Payments Network Sync Kowhal Inc

Sync

**Viewpost® Sync for Microsoft Dynamics® GP**

Connect your accounting software to your Viewpost account, helping you minimize data entry, save time and enjoy business without walls®.

**Microsoft Dynamics GP Requirements**

- Microsoft Dynamics GP 2010, 2013, 2015, 2016 and 2016 R.2

**System Requirements**

- Windows XP, Windows Vista Business/Ultimate SP2 or above, Windows 7 Professional/Ultimate, Windows 10
- .NET 4 Framework ([Download and install](#))

**Microsoft Dynamics GP**

- To sync Microsoft Dynamics GP with your Viewpost account, click below and a Viewpost team member will be in touch.

**Contact Me**

What transactions can be synced?	Need Help?
<ul style="list-style-type: none"><li>• Vendors</li><li>• Payable invoices for your vendors</li><li>• Viewpost payment commands</li><li>• Payment remittance for payments made to vendors for non-Viewpost payments</li><li>• Payments made to vendors on the Viewpost.com web site into Dynamics GP</li><li>• Invoices from your Viewpost-connected vendors</li><li>• Customers</li><li>• Detailed Receivable invoices</li><li>• Payment receipts from your customers</li></ul>	<ul style="list-style-type: none"><li>• <a href="#">Help Center</a></li><li>• Email: <a href="mailto:support@viewpost.com">support@viewpost.com</a></li><li>* Available Monday through Friday 9 a.m. to 8 p.m. EST</li></ul>

Microsoft Dynamics GP is a registered trademark of Microsoft Corporation.



One of our team members will contact you with the steps to download and install the Viewpost Sync Agent for Microsoft Dynamics GP. Our team member will assist you in completing the GP setup if needed and then the installation of the Sync Agent.

## 5. General Information on the Sync Agent

The Viewpost Sync Agent for Microsoft Dynamics GP runs as a separate application and should be installed on the same computer where Microsoft Dynamics GP is installed. It can be installed locally on a user's workstation Computer or on a Terminal Server, Citrix server, or XenApp server. Confirm that your environment and the computer where the Sync Agent will be installed meet the below System Requirements.

## 6. System Requirements

### Ports

The following TCP ports must be open:

- 80
- 443

### URLs

The computer where the Sync Agent will be installed must have Internet access and able to access the following URLs:

- <https://www.viewpost.com>
- <https://api.viewpost.com:8443/oauth/ping>

### Email

The Viewpost users will receive, and must be able to act upon, email messages from:

- [noreply-vp@viewpost.com](mailto:noreply-vp@viewpost.com)
- [contact@viewpost.com](mailto:contact@viewpost.com)
- [network@viewpost.com](mailto:network@viewpost.com)

Emails to Viewpost users will be in HTML format and contain links that the user must be able to click.

### SQL Server Version

SQL Server versions 2005 – 2016 are supported.

### Dynamics GP Version

The Dynamics GP client application must be installed on the same machine where the Viewpost Sync Agent will be installed. Dynamics GP versions 10.0, 2010, 2013, 2015, and 2016 including all service packs are supported.

### .NET Framework 4.5

The computer running the Viewpost Sync Agent must have the Microsoft .Net 4.5 Framework installed.



## 7. Download and Install the Viewpost Sync Agent

A Viewpost team member will guide you through the download and installation of the Sync Agent software.

## 8. Read the GP Sync Agent Guide

The GP Sync Agent User Guide explains how syncing works, use this as a guide as you begin using the Viewpost Sync agent.

You can find it at <https://support.viewpost.com/hc/en-us/articles/205104328-Syncing-with-Microsoft-Dynamics-GP>