

Xerox® Connect App for QuickBooks Online Quick Start Guide

Xerox® Connect App for QuickBooks Online is for use with Xerox® ConnectKey® Technology-enabled devices, Xerox® VersaLink® devices, and Xerox® AltaLink® devices.

- Xerox® Connect App for QuickBooks Online provides more functionality to supported Xerox® devices.
- Xerox® Connect App for QuickBooks Online is readily available to anyone with a Xerox® App Gallery account.
- You can install the app from the Xerox® App Gallery App on supported devices.
- You can use the Xerox® Connect App for QuickBooks Online to scan receipts, add expenses, and update transactions for QuickBooks Online.

Installing the Xerox® Connect App for QuickBooks Online from the Xerox® App Gallery App

The following procedure assumes that a Xerox® device Administrator created an App Gallery account, and that the account credentials for Email and Password were saved. The saved Admin credentials allow all Xerox® device users' access to the Xerox® App Gallery App without having to log in with individual account credentials.

Note

For detailed instructions on how to add a device or install apps from your Xerox® App Gallery account, refer to the documentation links at the end of this guide.

1. From the device home screen, touch **Xerox® App Gallery**.
The App Gallery appears.
2. Browse the Gallery for **Xerox® Connect App for QuickBooks Online**.
3. Touch **Xerox® Connect App for QuickBooks Online**, then touch **Install**. If a new version of an installed app is available, an **Update** notification link appears. To install the new version on your device, touch the **Update** link.
The License Agreement dialog appears.
4. Touch **Agree**.
The installation process begins.

Note

If the app does not install successfully, an error message appears with the reason for the failure. To resubmit the app for installation, touch **Install**.

5. To exit the Xerox® App Gallery App and return to the device default screen, touch **Home**.

Installing the Xerox® Connect App for QuickBooks Online from the Xerox® App Gallery Web Portal

A Xerox® App Gallery account is required. If you do not have access to a Xerox® App Gallery account, refer to the *Xerox® App Gallery Quick Start Guide* for account creation instructions, or contact your System Administrator.

Note

For detailed instructions on how to add a device or install apps from your Xerox® App Gallery account, refer to the documentation links at the end of this guide.

1. Go to the Xerox® App Gallery.
<https://appgallery.services.xerox.com>
2. Click **Log In**.
3. Enter a valid email address and password.
4. On the Devices tab, if necessary, add a Xerox® device.
5. Browse for **Xerox® Connect App for QuickBooks Online**. To view the app details, click the app.
6. Click **Install**.
7. To continue with the app installation, follow the onscreen instructions.

Initial Setup

Before you can use **Xerox® Connect App for QuickBooks Online**, you will need to connect the app to your QuickBooks Online account. To do so, follow these steps:

1. From a web browser on your computer, go to the Xerox® Connect for QuickBooks Online portal at <https://login.xeroxreceipts.com>
2. Click **Log into Intuit QuickBooks**.
3. You will be taken to an Intuit sign in page where you will enter your **Email** or **user ID**, followed by your **password**.
4. Click **Sign In**.
5. If your account has more than one company associated with it, you will be asked to select a company to have the app sync with. If you only have one company associated with your account, you will not be prompted and can continue to **6**.
6. Click **Connect**. You will be taken to the Xerox® Connect for QuickBooks Online portal Settings page.
7. Enter a valid email under **Accounting Email**. This email address is where any expense transactions will be emailed.
8. You can toggle **Require Employee PIN**. This will ensure each user has to enter their PIN each time they want to use the app. This PIN is their employee ID as set in QuickBooks Online.
9. Select an **Expense Reimbursement Account** from the drop-down menu. This is an “Other Current Liabilities” account which is used to process the expense transaction.
10. Beside Devices, click **Add Device**.
11. A popup will appear with a code for your device, write this code down and note that it expires within 30 minutes.
12. Click **Apply Settings**.
13. Go to your Xerox® device. From the device home screen, touch **Xerox® Connect App for QuickBooks Online**.
14. If the device hasn't been activated with QuickBooks Online before, you will be asked to **Enter activation code**. Enter the code you wrote down in **11**.
15. Touch **OK**.

Reimburse an Expense

1. From the device home screen, touch **Xerox® Connect App for QuickBooks Online**.
2. Select the desired user.
3. If prompted, enter a valid **PIN**. Your PIN is your employee ID as set in QuickBooks Online.
4. Touch **OK**.
5. Touch either **Multiple Receipts** or **Single Receipt**, depending on how many you have.
6. You have the option to Lighten / Darken the scan by touching **Lighten / Darken**.
7. Touch **Scan**.
8. Once the scan has completed, you will be shown a preview of your scanned receipts. Touch **OK**.
9. The summary of your scanned receipts appears. You can scroll through the information on the right-hand side, ensuring everything is correct.

Note

While on the receipt summary page, touching the receipt preview image will enlarge it, where you can spread/pinch to enlarge/shrink the view. If you are on an 8th Gen version, use the **+ / -** to control enlargement.

10. If there was more than one receipt, touch **Next** to move to the next one. Otherwise, touch **Done**, which sends the information to QuickBooks.

Handling an Expense

1. Once an expense has been created within the app, a bookkeeper or accountant will receive an email which will contain a URL.
2. Click the **URL**. This URL will take the user to the expense submission in QuickBooks Online.
3. If the user isn't already logged in, enter an **Email** or **user ID**. Click **Sign In**.
4. The user (bookkeeper or accountant) can then review the expense reimbursement with the associated receipt scans.
5. The user can modify the transaction as they see fit and create the associated payment transaction which offsets the reimbursement account and shows payment to the employee.

Support

Online Help and Documentation

To access the Xerox® App Gallery knowledge base, click the link
<https://www.support.xerox.com/support/xerox-app-gallery/support>

To access the Xerox® App Gallery documentation, click the link
<https://www.support.xerox.com/support/xerox-app-gallery/documentation>

Application Support

To access the Xerox® Connect App for QuickBooks Online application support, click the link
<https://www.xeroxreceipts.com/>

Supported Devices

For a list of supported Xerox® devices, click the link
<https://www.xerox.com/en-us/connectkey/apps>