Xerox® Connect App for Sage Accounting

Quick Start Guide for use with Xerox® Connect App for Sage Accounting

DESCRIPTION

Xerox® Connect App for Sage Accounting (Connect for Sage Accounting) is a Xerox App Gallery app that allows users to connect to their Sage Business Cloud Accounting account, right on the device. Xerox® Workplace Solutions (Xerox® Workplace Suite and Xerox® Workplace Cloud) works as the Single Sign-On mechanism, making sign in fast and easy. The user can capture vendor invoice data using Google's Invoice Capture technology. The app will automatically pull details off a user's vendor invoice, and then use those details as data to create the invoice within Sage. Alternatively, the user can scan and attach a payment, such as a check or check stub, to an existing, outstanding invoice. Connect for Sage Accounting is available to the customer who purchases the app and downloads it using a Xerox App Gallery account. You can also try the app for a defined trial period.

Xerox® Connect App for Sage Accounting is for use with Xerox® ConnectKey® Technology enabled Multifunction Printer, Xerox® AltaLink®, and Xerox® VersaLink® Devices.

Device Requirements

Throughout this guide, the Word "Device" is used synonymously and interchangeably with Multifunction Printer and Printer.

All devices require the following:

- Xerox Extensible Interface Platform® (EIP) must be enabled to allow the app to be installed.
  - Devices must support EIP 3.5 or higher
- Xerox® ConnectKey® App Installation (Weblet Install Policy) must be enabled to allow installation of the App.
- Ensure the device is able to communicate with the Internet.

Note:

Some networks require a proxy to communicate with the Internet.

If Verification of SSL is enabled on the device, ensure the security certificates are loaded on the device.

By default, the Xerox® Solutions Certificates are preloaded on all 2016 Xerox® ConnectKey® Technology-enabled i-Series, AltaLink®, and VersaLink® Devices

For more information on the settings above, refer to the Xerox App Gallery Online Support at: https://www.support.xerox.com/support/xerox-app-gallery.com

INSTALLING XEROX® CONNECT APP FOR SAGE ACCOUNTING

The following procedure assumes you have created a Xerox App Gallery account. If you do not have access to a Xerox App Gallery account, refer to the Xerox App Gallery Quick Start Guide for instructions on creating an account.

Note:
For detailed instructions on adding a device and adding or installing Apps to your Xerox App Gallery account, see the documentation links at the end of this guide.

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INSTALL GALLERY APPS FROM THE XEROX APP GALLERY WEB PORTAL (PAID APP)

1. Go to the Xerox App Gallery URL: https://appgallery.services.xerox.com
2. Select Log In.
3. Enter a valid Email and Password.
4. On the Devices tab, add a Multifunction Printer or Printer, if necessary.
5. On the All Apps tab, select the desired app.
6. Select the **Subscribe** button.
7. Accept the App End User License Agreement (EULA).
8. Select **Checkout**.
9. Fill out the Billing information and select **Place Order**.
10. Select **Done**.
11. Check your email inbox for purchase confirmation.

INSTALL GALLERY APPS FROM THE XEROX APP GALLERY WEB PORTAL (TRIAL APP)

1. Go to the Xerox App Gallery URL: https://appgallery.services.xerox.com
2. Select Log In.
3. Enter a valid Email and Password.
4. On the Devices tab, add a Multifunction Printer or Printer, if necessary.
5. On the All Apps tab, select the desired app.
6. Select the **Install** button.
7. Clicking on the button launches the Install Trial screen.
8. Select the Device(s) that you would like to trial the App on and then select **Install**

CONFIGURING PURCHASED GALLERY APPS FOR SINGLE SIGN-ON: APP IS LISTED IN XEROX® WORKPLACE SUITE

Important: Xerox® Workplace Suite administrators should perform the following procedures. If you do not have Xerox Workplace Suite administrator permissions, contact the appropriate administrator to perform the following Admin Configuration steps:

1. Launch **Xerox® Workplace Suite**.
2. Click **Settings**.
3. Select **Single Sign-On**.
4. If your newly purchased app displays in the list, click it and select **Exchange Keys**.
5. This will send an email request to Xerox SSO Apps.
6. The administrator of the SSO Apps will then email the Xerox® Workplace Suite Administrator the required key.
7. The Xerox® Workplace Suite Administrator will enter the public key for the app.

SSO is enabled for the app. Users may now opt to use Single Sign-On at their first log-in attempt.

CONFIGURING PURCHASED GALLERY APPS FOR SINGLE SIGN-ON: APP IS NOT LISTED IN XEROX WORKPLACE SUITE

Important: Xerox® Workplace Suite administrators should perform the following procedures. If you do not have Xerox® Workplace Suite administrator permissions, contact the appropriate administrator to perform the following Admin Configuration steps:

1. Launch **Xerox® Workplace Suite**.
2. Click **Settings**.
3. Select **Single Sign-On**.
4. If your newly purchased app does not display in the list, click **Action** -> **New**.
5. Fill in the Description, Publisher, and Publisher Email address, App ID and Redirect URL.

This information should be part of the description on the App Details screen in the App Gallery. If this information is not available, contact the app creator.

6. Select **Send**.
7. Click on the app and select **Exchange Keys**.
8. This will send an email request to Xerox SSO Apps.
9. The administrator of the SSO Apps will then email the Xerox® Workplace Suite Administrator the required key.
10. The Xerox® Workplace Suite Administrator will enter the public key for the app.

SSO is enabled for the app. Users may now opt to use Single Sign-On at their first log-in attempt.

INITIAL SETUP: SIGN IN AND AUTHORIZE

Before you can use Connect for Sage Accounting, you need to authorize the app and your account in a web browser on a PC or mobile device. This process must be done **once** for **every account** you wish to use with the Xerox® Connect for Sage Accounting app.

When you open Connect for Sage Accounting, a screen appears that asks if you've completed this process before. If you have, you can select **Continue**, and continue to the app's sign in page, but if you haven't:

1. Select **Authorize Access**.
2. You'll be taken to the next page which displays the URL you must go to on your PC, and a QR code you can optionally scan with your mobile device.
3. On your PC (or mobile device), open a web browser and navigate to the URL.
4. When you reach Sage's sign in screen in your web browser, enter your email address and password, and then select **Log In**.
5. On the next page, click the **Allow** button. Your account is now authorized, and you won't need to repeat this process unless you wish to sign in with a different Sage email address and password.
6. Once you've clicked **Allow**, you can return to the Xerox® Device, open the Xerox® Connect for Sage Accounting app and select **Continue** when asked if you've completed the authorization process. The Sage sign in screen will appear in the app and you can sign in with the email

address and password you entered in step **4**.

HOW TO SCAN A VENDOR INVOICE

1. From the Device home screen, touch **Connect for Sage Accounting**.
2. When the app opens, you will be asked if you've completed the authorization process. If you have, select **Continue**, if you haven't, please see the instructions above under **Initial Setup: Sign in and authorize**. If you selected **Continue**, enter your email and password and then select **Log In**.
3. Once you are on the switchboard of the app, select **Scan Vendor Invoice**.
4. You'll be taken to the Scan Vendor Invoice page, where you can set your scan settings. Place your invoice on the platen or in the feeder and touch **Scan**. The scan will initiate, and the invoice will be processed. This may take a couple of minutes, depending on the size of your invoice.
5. Once the scan is done processing, the Review page will appear. This page is a summary of the data captured off of the invoice you scanned, and the fields required to add an invoice into Sage. **Note:** The app uses invoice capture technology to automatically capture and pull important details off of the invoice you scan. The app will do its best to recognize the invoice's contact, subtotal, ledger account, and tax rate. If the app sees these details on your invoice, it will populate each field with its corresponding value. Please keep in mind that the results may not be perfect, **so you should always confirm each value before progressing to the next page**. Every field, except Total, can be edited. Moreover, this page is meant to be a summary of all line items on your invoice. If you need to break the invoice down into individual line items, you can complete the workflow in the Connect for Sage Accounting app, and then sign into your Sage account on a PC to edit the entry further.
6. If you'd like to view a larger preview of your scan, you can touch the scan image.
7. Once you've confirmed the invoice details, you can select the **Send** button which will send the invoice to your Sage account and add the scan as a PDF attachment.

HOW TO SCAN A PAYMENT

1. From the Device home screen, touch **Connect for Sage Accounting**.
2. When the app opens, you will be asked if you've completed the authorization process. If you have, select **Continue**, if you haven't, please see the instructions above under **Initial Setup: Sign in and authorize**. If you selected **Continue**, enter your email and password and then select **Log In**.
3. Once you are on the switchboard of the app, select **Scan Payment**.
4. You'll be taken to the Scan Payment screen briefly before the Select Invoice popover appears. If you select **Account**, you will see a list of every account/contact that has an outstanding invoice. Once you select an account/contact, every outstanding invoice for that account will be listed. If you need to apply payment to more than one invoice, you can select 2+, otherwise, select a single invoice using the checkboxes on the left and select **OK**.
5. On the Scan Payment page, you need to select a bank account to associate this payment with, as well as a payment amount. **Note:** The amount you enter must be less than or equal to the total amount of all outstanding invoices you select in step **4**. If the amount is greater, an alert will appear on screen.
6. Adjust any of the scan settings and touch **Scan**.
7. Once the scan is complete, you'll be shown a scan preview and a list of read-only fields. These fields act as a confirmation before submitting the payment to Sage. If any of the field values are incorrect, you can adjust them by touching **Rescan** at the bottom of the page. Otherwise, select **Send**. This sends the payment to Sage and applies it to the invoice(s) you selected in step **4**. An image of your payment will be attached to the invoice in Sage, too.

SUPPORT

Xerox App Gallery Knowledge Base

https://www.support.xerox.com/support/xerox-app-gallery/support/enus.html

Xerox App Gallery Documentation

https://www.support.xerox.com/support/xerox-app-gallery/documentation/enus.html

Customer Support Forum

https://accounting.xeroxinvoices.com

Supported Multifunction Printers (MFPs) and Printers

https://www.xerox.com/en-us/connectkey/apps

Talk to your local Xerox provider for more information or visit xerox.com/verify to get started

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