QuickBooks Desktop

How does the syncing work?

Once integrated, you can sync with your desktop account in order to import your outstanding bills. Once your bills are entered in desktop, make sure the web connector is open. Check the box beside Plooto and click the update selected button.
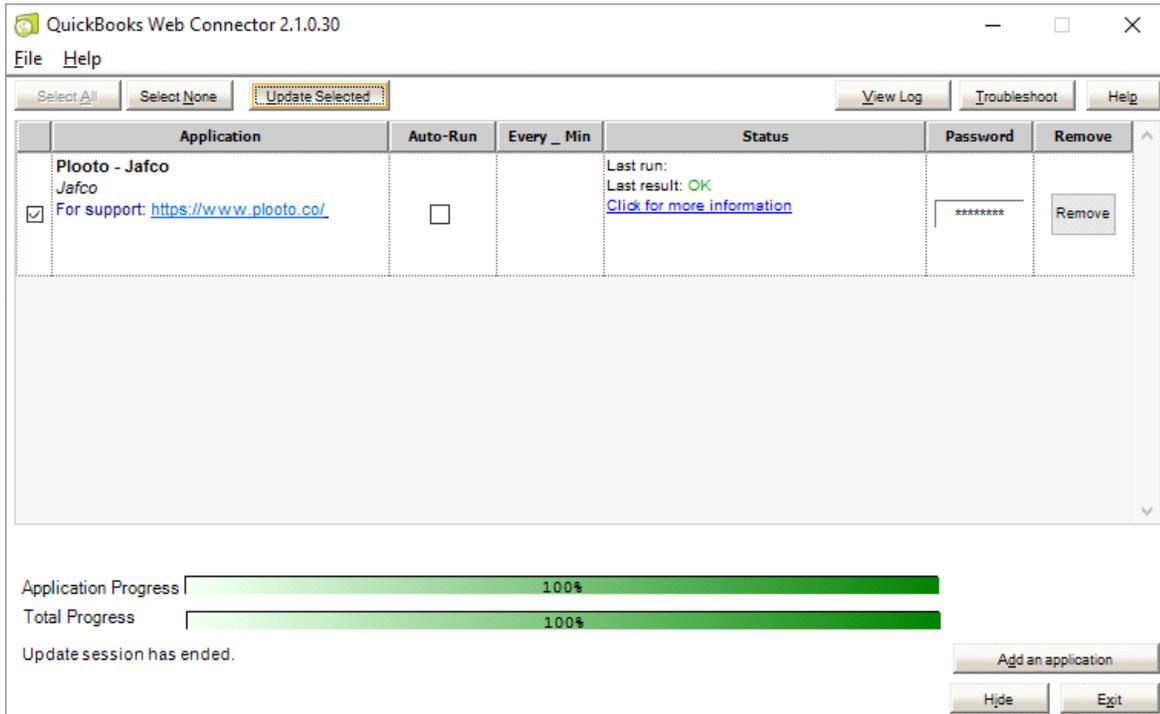

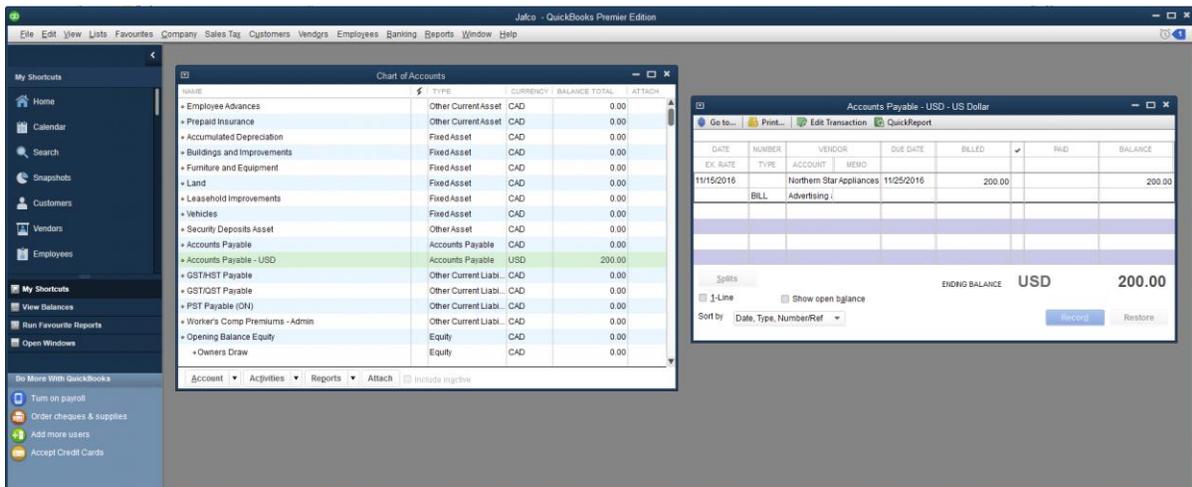*Figure 1. Click on Update Selected in the Webconnector*

Figure 2. Unpaid bills in QB Desktop

In Plooto, select the bills you would like to pay.

Great Job!
It was that easy. Your transaction has been submitted.
Payment Reference ID: IkLIXoju

Make another payment

View payment history

You can now reconcile your payments back to QuickBooks even if they are pending approval. If payments are rejected or deleted after being paid Plooto will automatically void your payments on next reconciliation.

How does reconciliation work?

In order to sync data between Plooto and QuickBooks Desktop you will need to click on "Update Selected" button (as shown in Figure1.) in the web connector. Reconciliation status is display on Plooto dashboard in case updates are required.

Desktop FAQs

How do I apply credits to payments?

In order to apply credits to payments, you will need to apply credits first in QBD before syncing.

Click on the Pay Bills button in QuickBooks and apply credits to use. Be sure to set "AMT. TO PAY" to $0.00 that way only the credit portion will be paid. Click on the "Pay Selected Bills" button to apply your credits to the selected bills.

Be sure to hit update selected in the web connector before syncing so that the correct amount is imported for the bill payment.

How is it different to the QBO integration?

Once the integration is set up the experience in Plooto for desktop users is very similar to that of QBO users. The desktop integration for syncing and reconciling bill payments does require a couple of extra clicks (unlike QBO integration which is fully automated). Everything else as far as payment processing, import of remittance advice, vendor information, approval workflow and notifications are exactly the same.

Link to integration Guide

http://support.plooto.co/customer/en/portal/articles/2412377-connect-quickbooks-desktop-with-your-plooto-account

This guide is also provided within the platform when you click on the QuickBooks Desktop icon in order to set up the integration.