



Business Payments Platform

QuickBooks Desktop Integration Guide

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Connect QuickBooks Desktop with Plotoo

Plotoo empowers you to streamline your payables and receivables workflows by syncing your Plotoo account with QuickBooks Desktop. Import your bills, invoices, payees, customers and bank accounts from QuickBooks directly to Plotoo. Your items are automatically reconciled once payments are completed, instantly making bill & invoice processing easier than ever.

Plotoo can connect with the following QuickBooks desktop versions:

- U.S. editions of QuickBooks Financial Software products
- QuickBooks Enterprise Solutions
- QuickBooks Premier (2002 or later)
- QuickBooks Pro (2002 or later)
- QuickBooks Simple Start (2006 or later)
- QuickBooks Point of Sale (v4.0 or later)
- Canadian editions of QuickBooks Pro, Premier or Enterprise (2003 or later)
- UK editions of QuickBooks Pro or Accountant Edition (2003 or later)

To connect QuickBooks Desktop with your Plotoo account:

1. Log in to your Plotoo account.
2. In the Dashboard tab, click on QuickBooks Desktop.

The screenshot displays the Plotoo dashboard interface. At the top, the Plotoo logo is on the left, and the user's name 'Western Auto Joanna Saunders' is on the right. Below the header is a navigation bar with icons for Dashboard, Request, Send, Contacts, Bank, and Switch Company. The main content area is divided into several sections:

- Transactions:** A bar chart showing transactions from Dec 2015 to May 2016. The y-axis ranges from \$0.00 to \$25,300.00. Below the chart, there are three columns of data:

Month	Total Payments	Total Outstanding	Pending Payments
Dec 2015	\$ 47,559.92 CAD \$ 0.00 USD	\$ 132,394.00 CAD \$ 6,630.00 USD	\$ 17,443.17 CAD \$ 0.00 USD
- Plotoo Instant Balance:** Shows a balance of \$ 50,000.00 CAD (Canada) with links for 'What is this?' and 'Add additional funds'.
- Quick Payment:** A form with fields for 'Pay To', 'Pay From', 'Amount', and 'Message (Optional)', followed by a 'Send' button.
- Outstanding Bills/Invoices:** A table with columns for Vendor, Ref No, Due Date, and Bill Amount. Below the table, there are three buttons: 'QuickBooks Online', 'QuickBooks Desktop' (highlighted with a red circle), and 'Connect to XERO'.

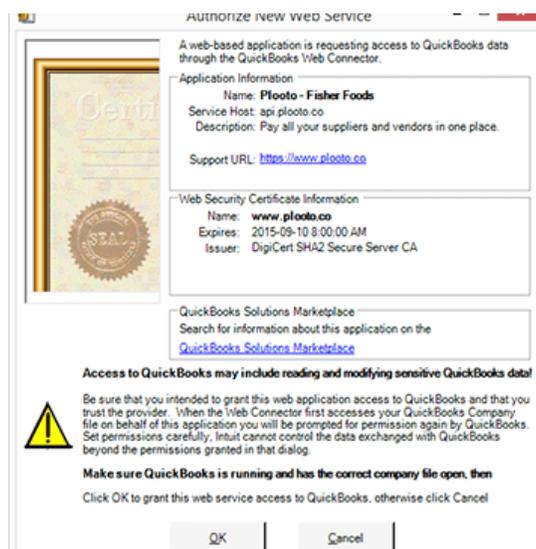
- Download the QuickBooks Web Connector (QWC) file. Plotoo uses the official QuickBooks Web Connector to communicate with your QuickBooks company file. Before proceeding to the other steps please make sure that you have permissions to install new software on your computer. Make sure that the QuickBooks Application is running before you run the QWC file.



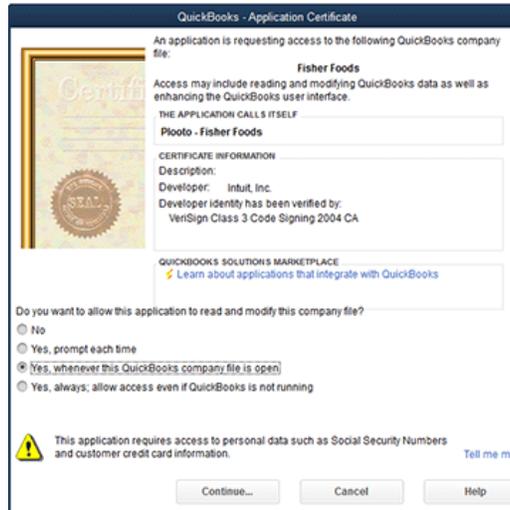
- Now that the QWC file is installed on your computer, you can download your company file. This file will allow you to sync and pay your bills via the Plotoo Dashboard. You can find the QuickBooksCompany File within your Plotoo Account.



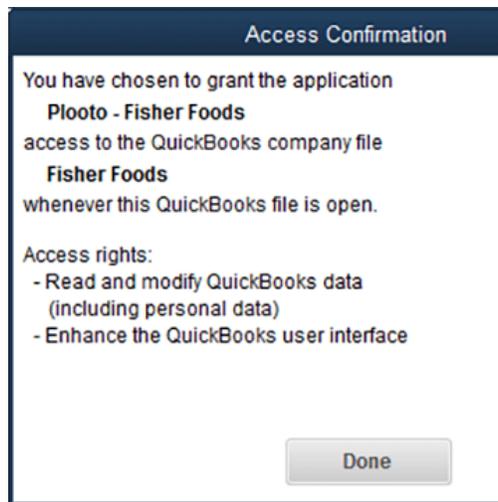
- After installing QuickBooks Web Connector, run QuickBooks application and open your company file as a company administrator.
- Open the QuickBooks Company file that you've downloaded from within your Plotoo account, you should see the certificate confirmation.



7. Click on “Yes, whenever this QuickBooks Company file is open option”. Then click on Continue.



8. Close the confirmation box by clicking “Done”.



9. Enter your company password that was previously generated on the Plooto Integration page when you’ve downloaded the QuickBooks Company File. Your QuickBooks password is different from your user password. It's a small 6 digits number that expires once entered.

QWC Company File



Download this file once Web Connector is installed.

[Download](#)

Your Company File password:

093749

Enter this number when prompted by Web Connector.

QuickBooks Web Connector 2.0.0.139

[View Log](#) [Troubleshoot](#) [Help](#)

Run	Every _ Min	Status	Password	Remove
		Last run: Last result: Ended QuickBooks session Click for more information	*****	Remove

100%

0%

[Add an application](#)

[Hide](#) [Exit](#)

Input the Company File password from Plooto (left) into the Web Connector (right)

10. Click the checkmark besides your company name and click Update Selected.

QuickBooks W

File Help

[Select All](#) [Select None](#) [Update Selected](#)

	Application	Auto-Run	Every
<input checked="" type="checkbox"/>	Plooto - Fisher Foods <i>Pay all your suppliers and vendors in one place.</i> For support: https://www.plooto.co/	<input type="checkbox"/>	

11. Your connection to QuickBooks Desktop is now successfully established.