Technical Note

PrintBoss Online Setup **27 November 2017**

Below are instructions to setup a new PrintBoss Online user as well as how to use PrintBoss Online. At the end of this document is a “FAQ” that will give you short answers to several questions.

Access the App and creating a connection to your QuickBooks Online Account

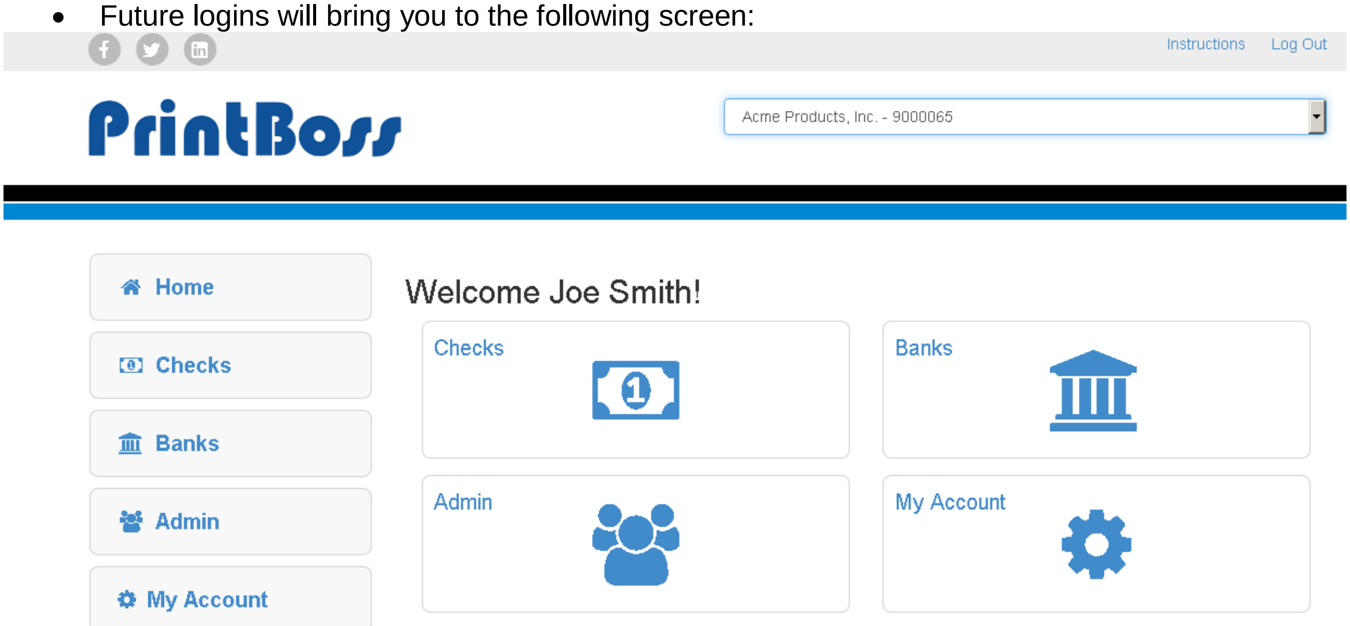
- Navigate to pbo.PrintBossOnline.com. This opens the PrintBoss Log In screen.
- Enter your name and email address. Your email address will be your login id.
- Click the Sign Up button.
- Click the Connect to QuickBooks button.
- Sign in to the QuickBooks Online account that you want to use and Authorize Access
- Click the ‘Sign up now’ text at the top of the screen.
- Create your account.
- See the Getting Started section to import your checks and to set up your bank accounts.

Add a New Company to your PrintBoss Online account

- Navigate to pbo.PrintBossOnline.com. This opens the PrintBoss Online Log In screen. If it doesn’t be sure to sign out.
- Enter your existing username and password. Username is the email address you initially signed in with.
- Click the **Sign Up** button.
- Click the Connect to QuickBooks Button
- Sign in to the QuickBooks Online account that you want to use and Authorize Access
- Your multiple accounts will now be accessible using the dropdown list in the upper right corner of the browser window.

Using PrintBoss Online

- Future logins will bring you to the following screen:



- Other than the Home button, the larger buttons in the middle are the same as the buttons down the left side of the page.

Getting Started

To begin with you need checks and a bank record associated with those checks. If you do not have any unprinted checks in your QuickBooks Online account we suggest creating a dummy check first. When first setting up your PrintBoss Online account there will be some flyover/highlighted helper text to guide you through setting up your first bank record.

Once you have a check:

Go into PrintBoss Online
Click the Checks button
Click the Import button

You will see a tab with **No Bank** at the top and next to each check not associated with a bank.
Click the "**No Bank**" link that is to the right of the check.
Follow the instructions on **Add a Bank Record** below after the 2nd instruction.

Add a Bank Record in PrintBoss Online

- In PrintBoss Online, click the Banks button.
- Click the 'Add New Bank' link.
- Enter the Bank Name. This is the actual name of the bank. This is what will print on the check itself.
- Enter the 'QuickBooks Name' for this account. This is a required field and a value must be entered. If you are not positive about the name entered in QuickBooks Online, there is a way to change this value later. If this field was prefilled **DO NOT** change this field. This is how PrintBoss Online communicates with QuickBooks Online to determine which bank you are using. If you change the name in QuickBooks Online you will need to change it in PrintBoss Online or they will appear as **No Bank** checks.
- Continue filling out the rest of the required bank information. The Bank Address fields may be left blank if not used by the bank. Each field has a question mark icon to the right of it. Mouse over that icon to view the help text for that field.
- When entering the position information for a logo or signatures make note that the positions are relative to the check itself, not the page. So the positions would be the same for top, bottom or middle checks.
- Logos and Signatures can be added per bank record and the position changed if necessary. PrintBoss Online currently supports BMP or JPG/JPEG file types.
- Fill in the Check Options as desired. All defaults are for checks/envelopes purchased from Wellspring Software. PrintBoss Online supports top, middle or bottom styles with a 3.5" check. It does not support equal thirds checks as those checks are taller.
- Click Save.
- Additional changes can be made by clicking the pencil icon to the left of the Name.
- Banks can be deleted by clicking the red **x** to the right of the account number in the Banks list.

Using PrintBoss bank records

If you are a PrintBoss desktop user you can import your bank records from PrintBoss directly into PrintBoss Online. First log into PrintBoss as the Administrator. From the main menu select Options|Security and make sure the "Display ONLY primary fields" checkbox is unchecked and click OK. Then go to Edit|Bank List and select the bank records you want to export. Press CTRL-A to select them all. Then right click on the gear icon in the upper left of the list and choose Export. Save the file to a secure location because at this point your routing numbers are not encrypted.

Now log into your PrintBoss Online account and click on the "Banks" button. Near the top you will see an Import from PrintBoss link. Click that to continue. On this screen you will have to select the default check location of the check stock that you are using as well as the "Choose File" button. Once you select the file click the "Import" button.

All of your records should now be displayed. You will have to fill in the "**QuickBooks Name**" for each bank records so that PrintBoss Online will know which Quickbooks Online account this bank works with.

Admin

The Admin button allows the Administrator to add new Users and provide users with Roles. Roles determine the User's access to the following tasks:

- Edit Banks
- Generate Checks
- Import Checks
- Print Checks
- View Banks

When a user is added they will get an email invitation notifying them that you have set up an account for them. They can then finish signing up and set their password.

Click on the Settings button to connect or disconnect from QuickBooks Online. When connecting, the User ID and Password for the specific company must be entered in order to connect. You can also update the company address here as well. This address can be imported into your bank record when setting them up.

The Subscription option allows you to assign a credit card to your account for billing. You can also cancel your subscription here.

The Signature/Workflow option allows you to set up check signing options so that a check must be approved by one or two users before it can be generated.

Invoice area allows you to see all of your invoices for PrintBoss Online.

Checks

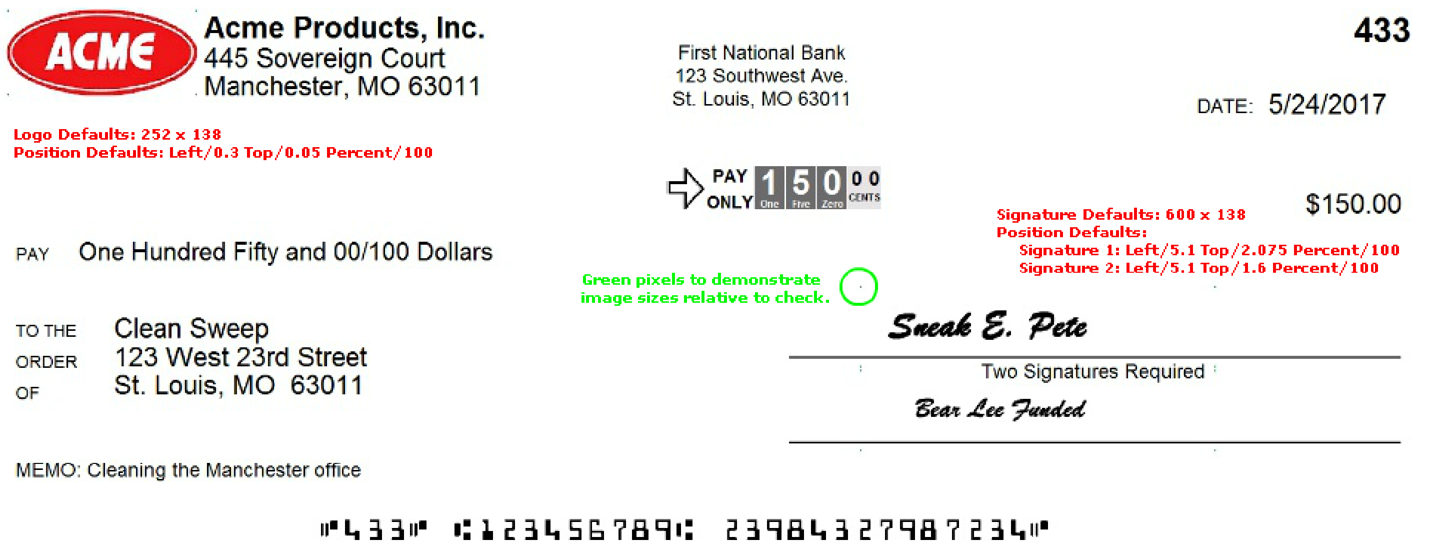
Select this feature to Import checks that are set to the 'Print Later'. This will mark the check 'To Print'. Then follow the steps below to print the checks in PrintBoss Online:

- Click Import. The status for newly imported checks will appear as 'Ready to Generate'. If a check signing workflow has been added to this bank then it may alert you that it is waiting on a signature approval before it can be generated.
- Check the box for a specific check or checks, or select the checkbox to the left of the Date label at the top to select all the checks in the list.
- Click Generate. This will change the Status of the check from 'Ready to Generate' to 'Print this Check'.
- Click on the blue 'Print this Check' text under the Status column to print a specific check, or click the 'Print Selected' button at the top of the check list to print all selected checks.

Signatures and Logos

Signature and Logo images must be a JPEG (JPG) or BMP format. **Signature files created by Wellspring Software for use in the desktop version of PrintBoss do not work with PrintBoss Online.** Use the image below for a guideline on how to size and place your images on the check. If you do not want someone to have access to the signatures for security reasons, remove the **Print** Checks ability on the Admin/Users page for a given user or set up a Signature/Workflow option for the selected bank.

Note, the position values are based on the check itself, not on the page.



Each check can have a logo and up to two signatures. In this sample you will see the sizes used in our default sample and each image has a green dot in each of the corners so that you can see the actual size on the check. If you make your logo wider it will automatically adjust the address. If your logo or signatures are larger than the recommended size it will be reduced so that it fits in the space allotted will keep the aspect ratio when doing so.

IMPORTANT NOTE: If the bank name in QuickBooks Online does not match the 'QuickBooks Name' field in the PrintBoss Online bank record, your checks will appear under the **No Bank** tab after an Import. Edit the PrintBoss Online bank record and be sure the QuickBooks Name matches what you have in QuickBooks Online. Then re-import the checks to get an updated list.

SIGNATURES / WORKFLOW OPTIONS

For a secure signature option you can have another user assigned to a company whose sole purpose is to sign/approve checks(but could do other tasks if desired). To set up a check signer go to **Admin** then **Signatures**. Click the **Add New Signature/Workflow** link. Enter a descriptive name like "Owner's signature" and then drag/drop the "Signature 1" button to the **Workflow Steps** box. Now click the person icon and select the user or users you want to sign the checks. If you set the option at the top to "Use User Signature" make sure that user has a signature set up in their user account. If you set it to "Use Bank Signature" the process will use whatever Signature #1 is set to in the bank record. Same goes for Signature 2, it will use the 2nd bank signature in the bank record. Use Bank Signature option will allow multiple people to approve the check using a single signature.

FAQ

ADD A COMPANY
When you are logged in you can click the Add a Company link in the upper right corner of the browser. This will allow you to connect to additional QuickBooks Online companies.

CANCEL SUBSCRIPTION
When you are logged in go to Admin/Subscription and click the red "Cancel Subscription" button

TOP/MIDDLE/BOTTOM CHECKS
To change check to top, middle or bottom style checks go to Banks, Select the Bank, Check Options, Check Location: select t/m/b

WINDOW ENVELOPES
To adjust the position of the various addresses on the check go to Banks, Select the Bank, Check Options and set the position relative to the check itself, not the whole page.

CANADIAN STYLE CHECKS
Canadian checks use a different format and to set it as such go to Banks, Select the Bank, Check Options and set the Use Canadian Check Style to Yes

REPRINT A CHECK
Check the box next to the checks you want to reprint and click the RESET button at the top in the button bar. It will reset the check in QuickBooks Online so that you can reprint the check.

ADJUST THE NEXT CHECK NUMBER
When viewing the checks you will see the next check number for the selected bank on the right site. Click on that number to adjust it. If you need to make more changes you can also edit the bank record and change it there as well.

UPDATE CREDIT CARD INFORMATION FOR BILLING
You can go to Admin/Subscription to add or apply a different credit card to your account.

NEEP A COPY OF A PRINTBOSS ONLINE INVOICE
Go to Admin/Invoices and select and print the invoices you need.

I NEED TO CHANGE MY PASSWORD/EMAIL
Go to My Account and click the Change Password link at the top of the information section. If you want to update your email change it here and click Save.

REMOVING ADMIN / CHANGE ACCOUNT MANAGER
If someone leaves your company and you need to appoint a new admin you will need to login as the admin you want to remove and go to **Admin**/**Users** and **Add New User**. When you add the new user make sure they have Admin rights and click **Save**. Click on **My Account** on the left and if they have a company assigned signature click the "**remove your signature**" link and click **Save**. The new user will get an invitation email, they should log in and click **Admin** then **Subscription** and add a billing credit card and click **Save** so that the billing info is updated. You will need to log out and back in to update the system completely. Once you log back in go to **Admin** and then **Users** and click the red **X** to the right of the ex-admin's name and that will remove that user from your company record. Doing it in this manner will allow you to retain all your bank records and any history for the company.