# U Wellspring

# **Installation Notes**

# **QBO Installation Guide**

**02 December 2014** 

PrintBoss is shipped ready to interface with QBO (aka QuickBooks Online). Here are a few guidelines to help with the integration:

#### **Use Internet Explorer**

For best results, use Internet Explorer.

### Select the proper "style" of check

1. When going into the Print Checks dialog of QBO, select the "Print setup" option found at the very bottom of your screen:

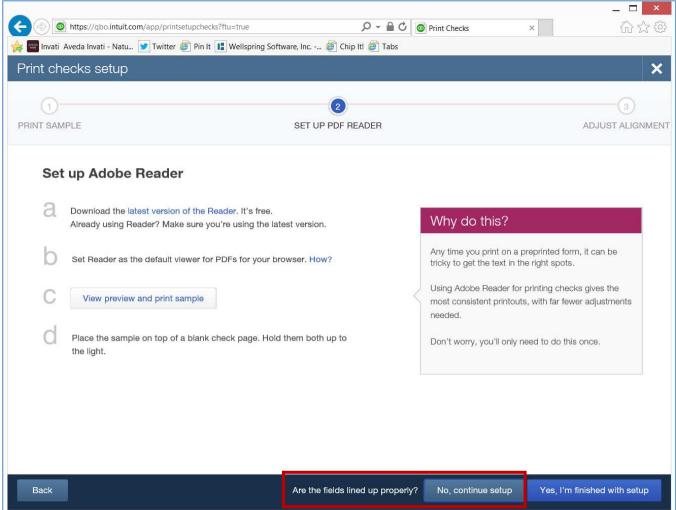
Cancel	Print setup	Order checks	Preview and print
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2. Select the proper style of check. Voucher style is for business checks with a stub. Standard is for "wallet" style checks that are 3-per-page with a little tab on the left for a miniature voucher.

		Print Checks ×	☐ ① ☆ €
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Print checks setup			>
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PRINT SAMPLE	SET UP PDF READER		ADJUST ALIGNME
Select a check type and print a sa	nple		
Select the type of checks you use:		Why do this?	
		Print a sample on blank paper correctly on preprinted checks. adjustments, you won't waste checks.	If you need to make
You can order checks from Intuit.			Align numbers to amount box on check.
Load blank paper in your printer.	<		
View preview and print sample			
Place the sample on top of a blank check page. H the light.	old them both up to		
		Tip! Most QuickBooks users h	ave the best

# Adjust the printer offsets in QBO

1. In QBO, at the point of printing checks, select the option at the bottom of your screen to Continue Setup:

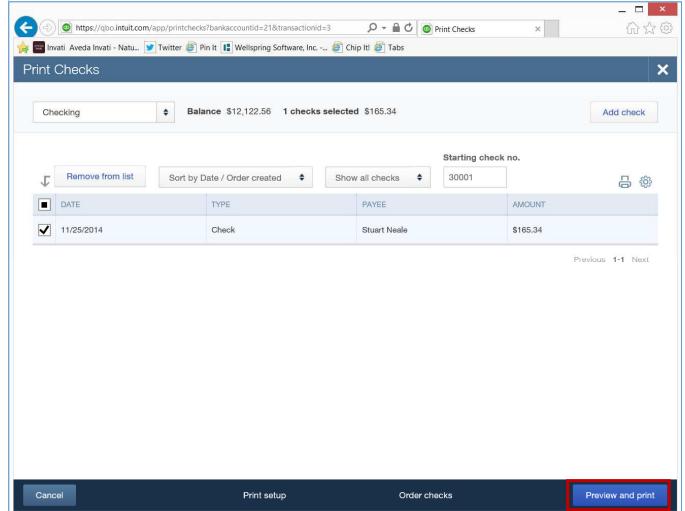


2. On the "Fine-tune alignment" screen, take note of your current horizontal & vertical values used for your pre-printed stock. To use PrintBoss, set both values to zero:

	MPLE	2 SET UP PDF READER	3 ADJUST ALIGN
Fin a	Drag the grid inside the large square to the place of your printout. This lets QuickBooks figure out how alignment.		Important
a	\$ **1,425.25		<ul> <li>Printing with Reader? In the preview, click the printer icon and set these options in the Paper Size &amp; Handling section:</li> <li>Actual size</li> <li>Choose paper source by PDF page size</li> <li>Auto portrait/landscape</li> </ul> Printing with your browser? In the Print window, be sure to print using actual size. This means you may need to clear any options or properties that scale, shrink, or fit to size.

# Print checks to the correct printer

1. In QBO, at the point of printing checks, select the option at the bottom of your screen to Preview and print:



2. In the print preview dialog, click on the printer icon:

<ul> <li>Methys://qbo.intuit.com/app/printchecks?bankaccountid=21&amp;transactionid=3</li> <li>Invati Aveda Invati - Natu</li> <li>Twitter </li> <li>Pin It</li> <li>Wellspring Software, Inc</li> <li>Chip It!</li> <li>Tabs</li> </ul>	☆☆© ×
Cher Print preview To print, right-click the preview and select Print. Or, click the Print icon if you see one below. Click here to download the PDF if you are unable to view it below	× eck
Image: Non-Start Neale     Start Neale     Weilspring Software 445 Sovereign Court     Manchester, MO 630	Next
Close	-

3. In the print dialog, select the "PrintBoss 50" printer

		Print		×
Pri <u>n</u> ter:	PrintBoss 50	✓     Properties     Advanced	<u>Help</u>	0
<u>C</u> opies:	1	Print in gra <u>v</u> scale (black and white)		
Pages to P	rint	Co <u>m</u> ments & Forms		
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4. In the print dialog, select the page size of "Actual Size". If you do not have this option, select "None".

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Printer: PrintBoss 50 Copies: 1	Properties	Advanced ale (black and white)	Help 🕜
Pages to Print	Comm	nents & Forms	
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Current page     Pages			
<ul> <li>Pages 11</li> <li>More Options</li> <li>Page Sizing &amp; Handling  <ul> <li>Size</li> <li>Poster</li> <li>Multiple</li> </ul> </li> <li>Eit <ul> <li>Actual size</li> <li>Shrink oversized pages</li> <li>Custom Scale:</li> <li>100 %</li> <li>Choose paper source by PDF page size</li> </ul> </li> </ul>	Booklet	nent: 8.5 x 11.0in 8.5 x 11 Inches	1000
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