

QuickBooks Connected Services Attached Documents



What is Attached Documents?

QuickBooks Attached Documents organizes all your business documents in one place. Whether it's invoices, estimates or orders, you can now store all electronic documents linked to your QuickBooks, online and easily scan paper documents for easy access in one central location. Using the simple paper clip icon within QuickBooks, users are able to access Attached Documents.

What are the Benefits?

- **Easy to stay organized:** organize documents based on your needs by customer, invoice, vendor, deposit, etc. It's easy to scan and attach paper documents such as receipts, photos or contracts directly into QuickBooks
- **Simple to use:** attach any document to your QuickBooks list items and transactions in just a few simple steps. Easy to find paper clip icon within QuickBooks shows you're clicks away from attaching a document
- **Save time looking for files:** one central location for all of your business information. Avoid the hassle of looking through separate folders and files. No need to put customers on hold when answering their questions
- **Access your attached documents** anytime and share with anyone online. Attached documents can be stored locally or online within QuickBooks Document Management Center. E-mail your attached documents to anyone without having to make them a user.

What are some good probing questions?

- What steps have you taken toward having a paperless office?
- How would it improve efficiency if you could link documents electronically to your customers in QuickBooks?
- How much time do you spend tracking down and/or filing paper documents?
- How much space is taken up in your office by filing cabinets?
- How often do you lose critical documents pertaining to your business?
- Based on how you currently store your business documents, how would fire or flood impact you at this time?
- How often do you have to place a customer on hold to find a document they are referencing?

System Requirements

- Internet access required when attaching files online
- 2.0 GHz processor, 2.4 GHz recommended
- 1 GB RAM for single user, 2 GB RAM recommended for multiple users
- 2.5 GB available disk space (additional space required for data files and locally attached documents)
- 250 MB disk space for Microsoft .NET 2.5 Runtime (provided on the QuickBooks CD)
- Optimized for 1024 X 768 screen resolution. 16-bit or higher color
- 4x CD-ROM

Frequently Asked Questions

How do customers activate the services?

Customers will receive a confirmation e-mail with a link. Clicking on the link will take them to the setup process for Attached Docs. The customer can also locate the paperclip icon in QuickBooks and access the setup process that way.

What if a customer wants to cancel?

Customers receive a 30 day free trial but can self-service cancel at anytime on IPP. The subscription will continue through the end of the current billing period and there is no refund for the remainder of the period. Customers can also cancel by calling 800-450-8475.

How does a customer receive support?

Customers can receive support by calling 800-450-8475.

What if the customer was a previous Document Management user?

If the user was a Document Management user in QB 2010, they can continue using the Document Management service to which they originally subscribed. This means that they will stay on the old Document Management pricing plans, which were by storage capacity, rather than # of attachments. The customer does have the option to change their pricing plan to one of the Attached Docs tiers, but is not required to.

Are there any limitations?

QB Attached Documents works only with QB 2011, and customers must have an internet connection when attaching a document or when retrieving one that has been stored online.

How do I enter the order?

Order entry in CRIS will be source code driven. Source codes can be found on Atlas, under "Offers" under "Connected Services." The service will show up in CRIS under *Contracts* not *Agreements*.

Are there any other steps customers need to follow after the sale?

They can begin using by going back into QuickBooks and locating a paperclip icon in any invoice, customer, etc. When they click on the paperclip, they will need to login to IPP and can then make the attachment.

Where do I find information on the latest features and functionality in QuickBooks Attached Documents?

Agents can visit <http://teamrooms.reno.intuit.com/servicedelivery/SBG/default.aspx> or Atlas to stay updated on the newest features. Additional communication will be provided via e-mail as needed.

Where can I direct customer feedback and questions?

All non-urgent customer questions and feedback can be e-mailed to QBDocMgmt@Intuit.com. Also, inside the online Document Management Center Help tab, the customer can find a link that says "Submit feedback."

Can you explain the 30 day free trial?

Agents will use a source code in CRIS to set up the free trial. When a customer signs up for the 30 day free trial, they will need to provide a credit card number. The card will not be charged until the end of the 30 day free trial. The customer will need to call if they wish to cancel the service.

Terms and Conditions

Must be on a supported version of QuickBooks. Not available to QuickBooks for Mac or QuickBooks Online users. Only TWAIN compliant and Fujitsu ScanSnap S300 scanners supported. Scanner not included. Maximum 100 MB per attached file if the file is stored online. You can cancel at any time by calling 800-450-8475. Terms, conditions, features, availability, pricing, fees, service and support options subject to change without notice.