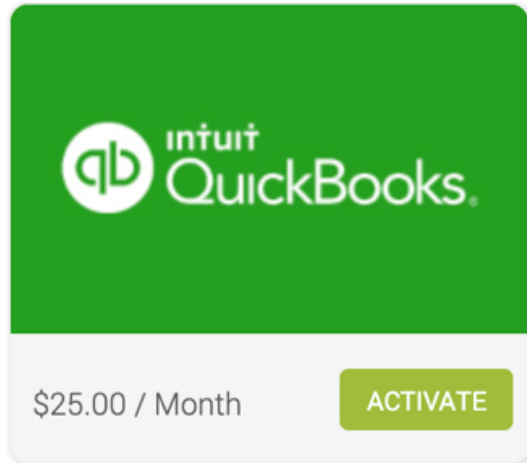


PRIORITY
PAYMENT SYSTEMS®

MX™ MERCHANT



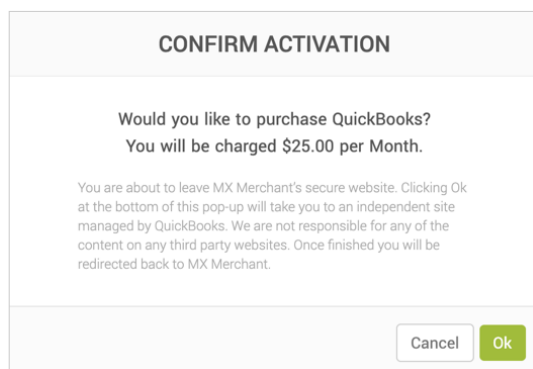
MX™ QuickBooks Sync Activation Guide



Step One

The QuickBooks tile may be found within "**Apps**" on the left-hand navigation of MX™ Merchant.

To activate QuickBooks, click "**Activate**" on the left-hand menu.



Step Two

Next, confirm activation and agree to any fees displayed by clicking "**Ok.**"

The screenshot shows the Intuit sign-in interface. At the top, the Intuit logo is displayed, followed by icons for TurboTax, QuickBooks, and Mint. Below this is the 'Sign In' heading and a sub-heading: 'One account for everything Intuit, including QuickBooks. [Learn more](#)'. A 'Sign in with Google' button is present. Below that, the text 'or' is centered. The 'Email or user ID' field is highlighted with a red border and a red 'X' icon, with the error message 'Please enter a valid user ID.' below it. The 'Password' field is also highlighted with a red border and a red 'X' icon, with the error message 'Use 6 or more characters and no spaces.' below it. A 'Remember me' checkbox is located below the password field. At the bottom, there is a blue 'Sign In' button with a lock icon.

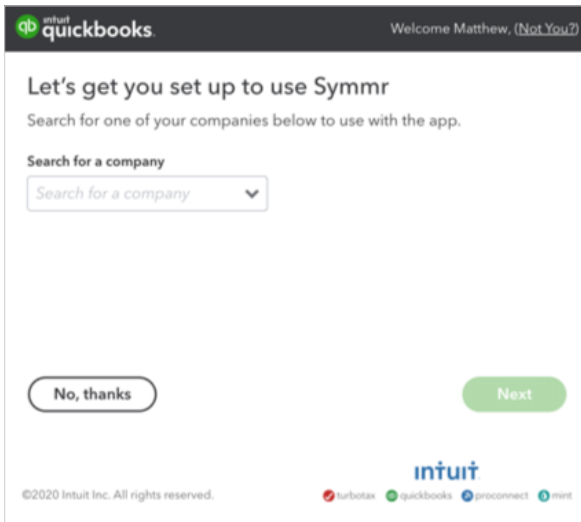
Step Three

If you are not actively logged into QuickBooks, you may be presented with the following Intuit login screen (left).

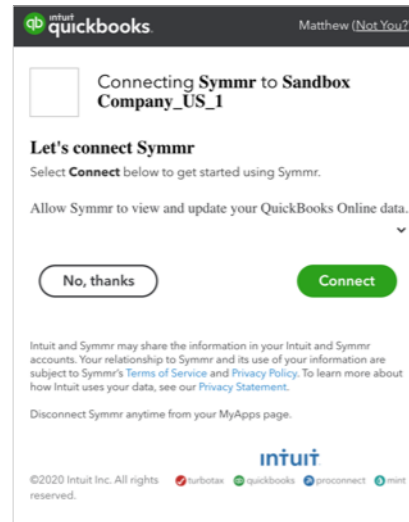
Step Four

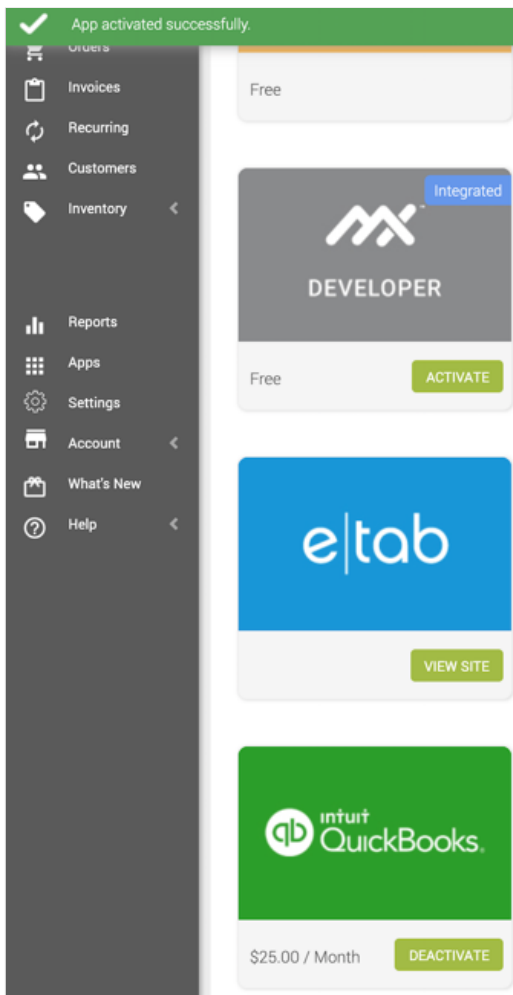
Next, you will be prompted to authorize the “**Symmr**” application for your QuickBooks company. Please note the multi-company prompt/dialog box will only appear for users that have access to a multi-company account.

Multi-company Prompt



Authorization Prompt





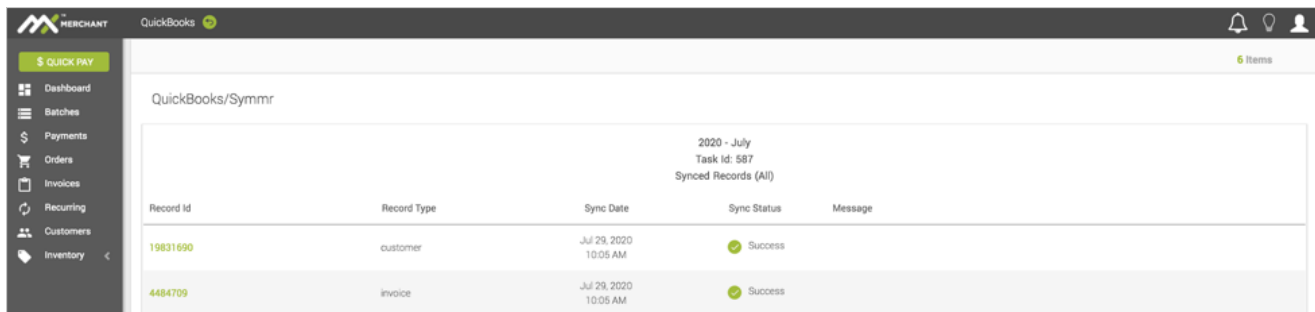
Step Five

After authorization is complete, you will be redirected to MX™ Merchant, and a green banner will appear indicating the application is successfully installed.

Payment data, once settled, will sync within 24 hours along with customer and invoice data.

Step Six

You may view the details of the synced data in MX™ Merchant by choosing “**Settings**” from the left-hand navigation and then QuickBooks. Choose the appropriate month and the record Id, record type (customer, payment, or invoice), Sync Date, Sync Status, and a message, if applicable, will be displayed for each record and by month.



The screenshot displays the MX Merchant interface for QuickBooks. The left-hand navigation menu includes options like Dashboard, Batches, Payments, Orders, Invoices, Recurring, Customers, and Inventory. The main content area shows the 'QuickBooks/Symmr' section for the month of July 2020, with a task ID of 587. A table titled 'Synced Records (All)' lists two records:

| Record Id | Record Type | Sync Date | Sync Status | Message |
|-----------|-------------|--------------------------|-------------|---------|
| 19831690 | customer | Jul 29, 2020 10:05 AM | Success | |
| 4484709 | invoice | Jul 29, 2020 10:05 AM | Success | |

Step Seven

The **Sales, All Sales** module in QuickBooks will show the synced data from MX™ Merchant including Date, Type, No, Customer, Memo, Due Date, Balance, Total, Status, and Action.

The screenshot displays the QuickBooks interface for the 'All Sales' module. A dark sidebar on the left contains navigation options: Dashboard, Transactions, Expenses, Sales (highlighted), Cash Flow, Payroll, Reports, Taxes, Mileage, and Accounting. The main content area is titled 'Long Play Records' and includes a 'New' button. Below the navigation tabs (Overview, All Sales, Invoices, Customers, Products and Services), there is a promotional banner for online payments. Below the banner are filter and batch action controls. A table lists sales records with columns for Date, Type, No., Customer, Memo, Due Date, Balance, Total, Status, and Action.

| | DATE | TYPE | NO. | CUSTOMER | MEMO | DUE DATE | BALANCE | TOTAL | STATUS | ACTION |
|--------------------------|------------|---------|------|----------------------|------|------------|---------|--------|--------|---------------------------------|
| <input type="checkbox"/> | 07/29/2020 | Invoice | 1031 | QuickBooks Sync Test | | 08/13/2... | \$0.01 | \$0.01 | Open | Receive payment |

Step Eight

If a customer was not added or is not associated with the payment, the customer will be listed as "Default Customer MXM," as shown below.

The screenshot displays the QuickBooks interface for 'Long Play Records'. At the top, there are navigation tabs for Overview, All Sales, Invoices, Customers, and Products and Services. Below these are summary cards for Unbilled Last 365 Days (\$0), Unpaid Last 365 Days (\$319), Open Invoices (21), and Paid Last 30 Days (\$48). A notification banner encourages online payments. Below the notification, there are filter and batch action options. The main table lists transactions with columns for Date, Type, No., Customer, Memo, Due Date, Balance, Total, Status, and Action.

| | DATE | TYPE | NO. | CUSTOMER | MEMO | DUE DATE | BALANCE | TOTAL | STATUS | ACTION |
|--------------------------|------------|------------|--------|------------------------|--------------|------------|---------|--------|--------|-----------------|
| <input type="checkbox"/> | 07/29/2020 | Invoice | 1031 | QuickBooks Sync Test | | 08/13/2... | \$0.01 | \$0.01 | Open | Receive payment |
| <input type="checkbox"/> | 07/27/2020 | Sales R... | 020... | Default Customer (MXM) | {"id": 11... | | \$0.00 | \$0.01 | Paid | Print |

To review a video of these instructions, click below.

[Watch video](#)