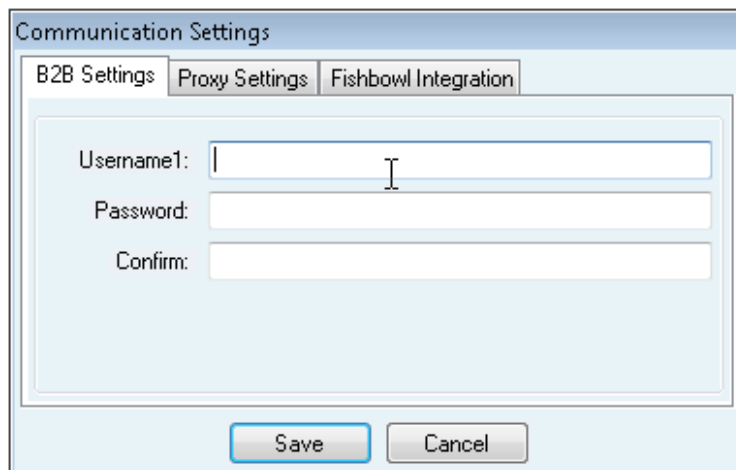
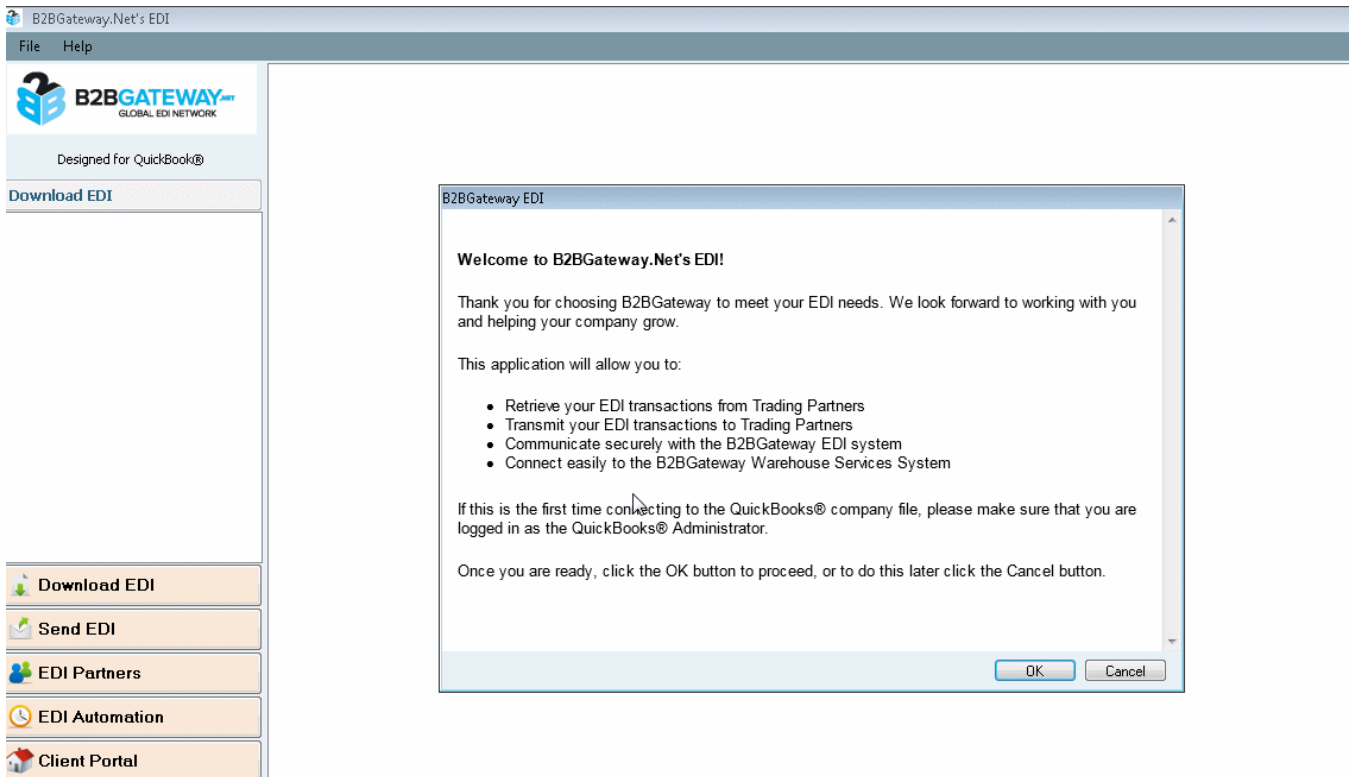


## Introduction

This guide will walk you through the steps required to connect B2BGatewayEDI to QuickBooks® and start Sending and Downloading EDI. QuickBooks will need to be installed on your machine and the administrator will need to login to QuickBooks for the initial connection.

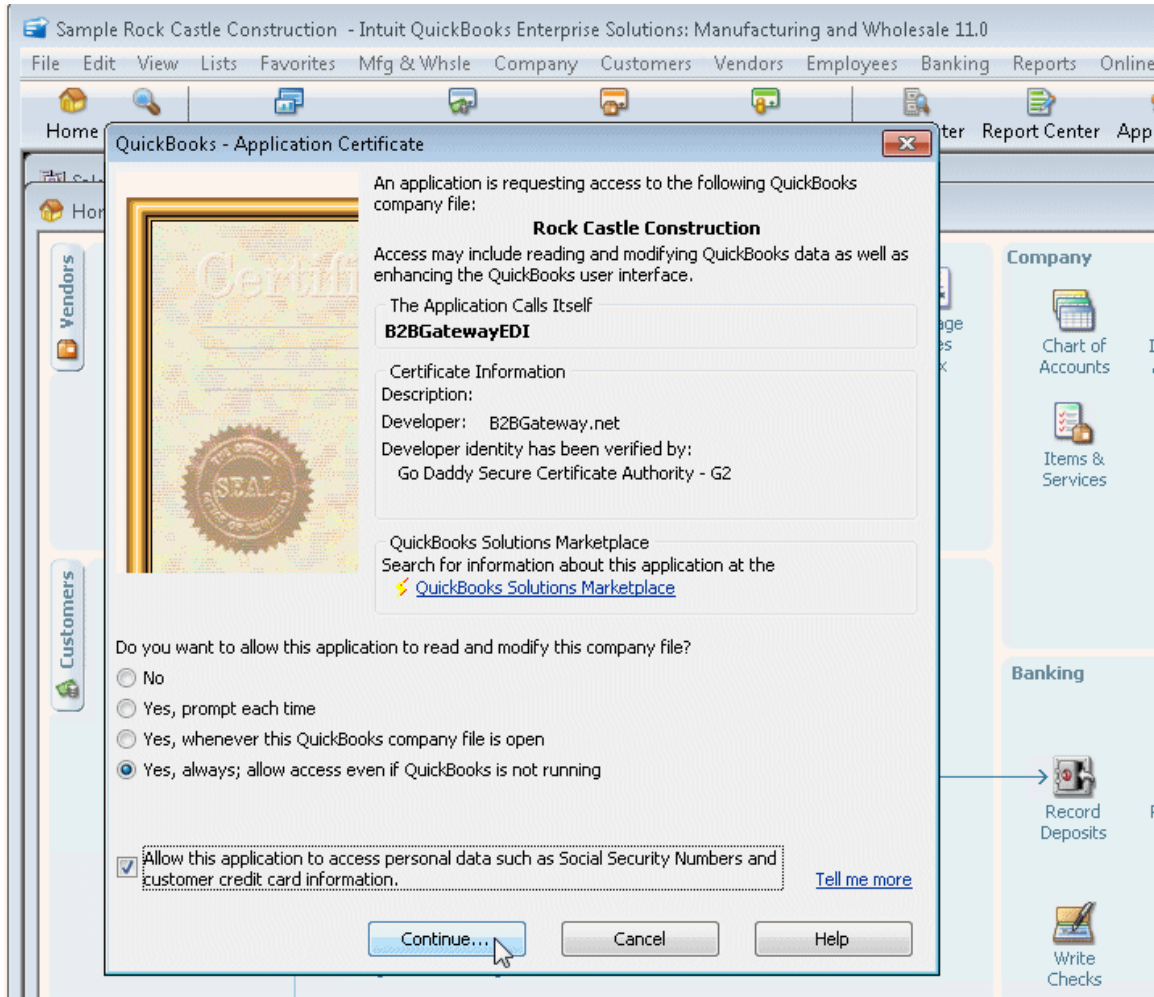
## Getting Started

Upon successful installation and opening of the application, you will see the welcome screen, and be prompted to enter in your assigned B2BGateway credentials.

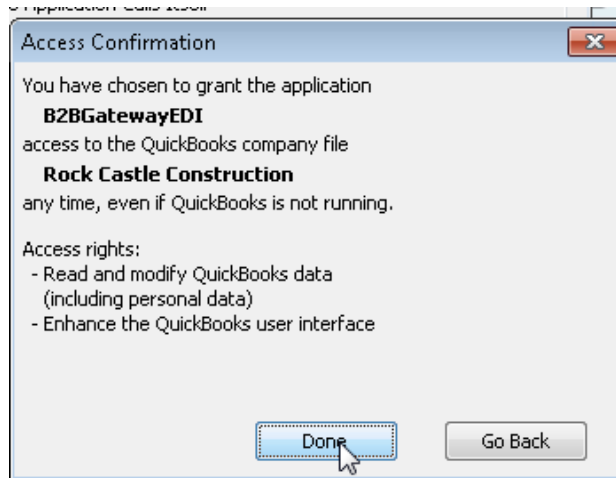


## Connect To QuickBooks®

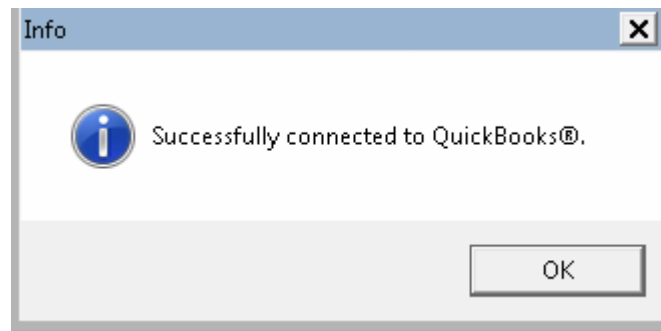
1. Open QuickBooks® and login as the QuickBooks® administrator.
2. Open the B2BGatewayEDI client by double-clicking the shortcut on your desktop or accessing the link under Start->Programs->B2BGateway
3. If this is the first connection, you will be presented with the Connection Wizard screen. Click the OK button to initiate the connection.
4. You will be presented with the below screen from within QuickBooks.



Choose the Yes, always; option and check the box to allow this application to access personal data such as Social Security Numbers. This is required in order to successfully process invoices. Click the Continue button when ready.



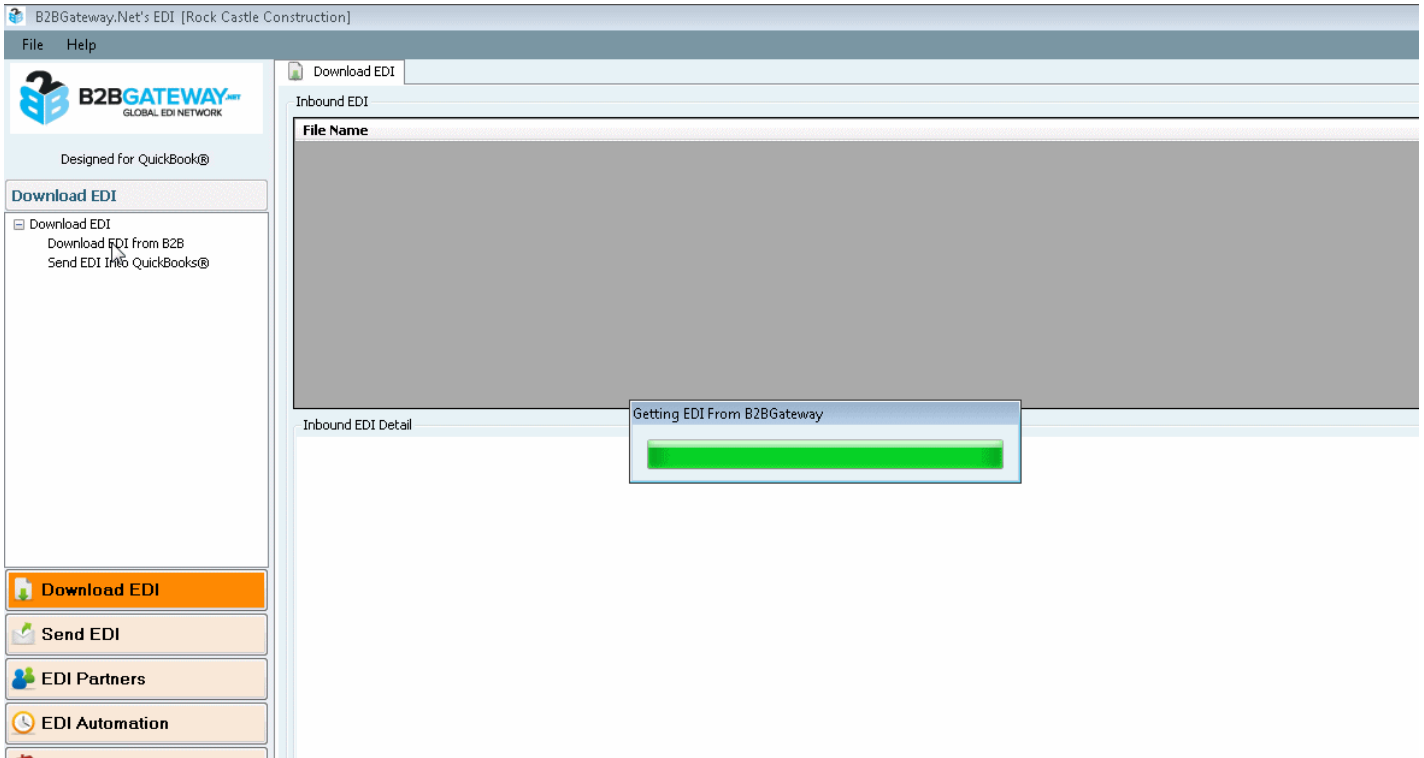
5. Click the Done button on the Access Confirmation dialog.
6. B2BGatewayEDI will display a successful connection dialog; click the OK button to proceed.



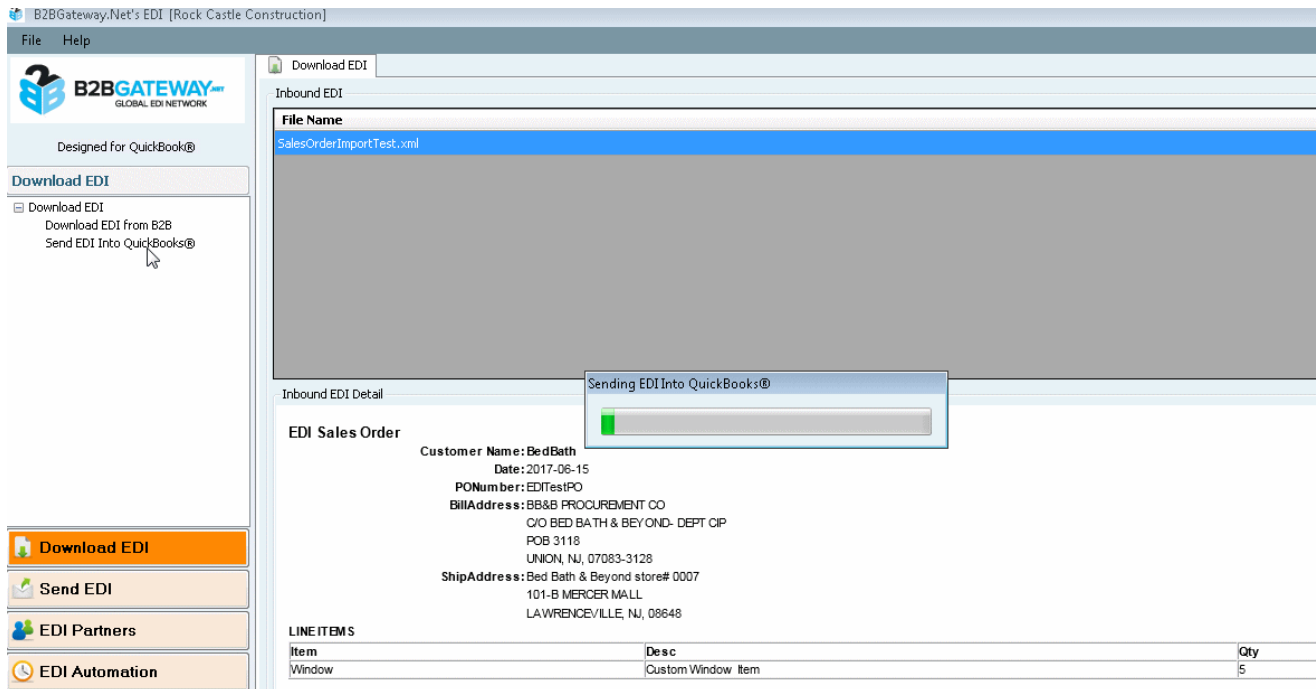
7. Congratulations! You have successfully configured the B2BGatewayEDI client.

## Send EDI Into QuickBooks®

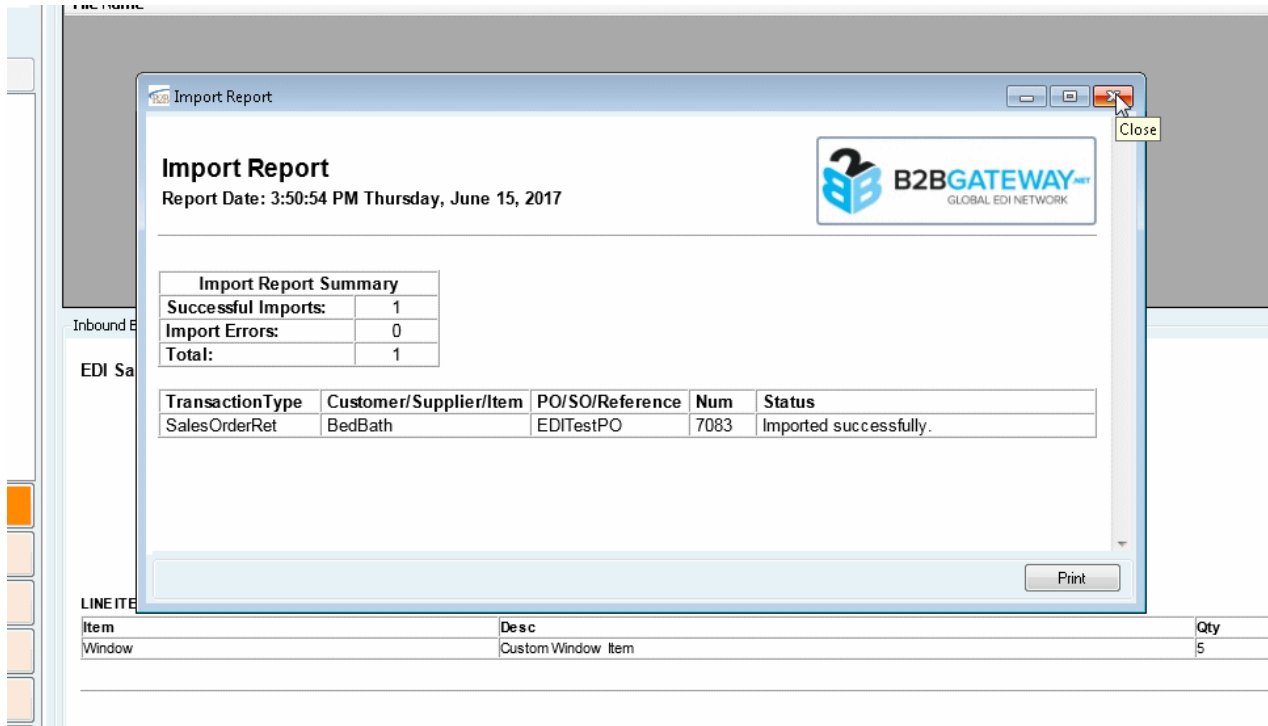
To Send EDI into QuickBooks® you must first download your EDI files from B2BGateway. Click on the Download EDI Tab on the left hand side and click the Download EDI from B2B menu item.



Once your EDI files have been downloaded, select the file you would like to Send into QuickBooks and click on the Send EDI Into QuickBooks button.



Once the files have imported you will receive a summary screen indicating success.



**Import Report**  
Report Date: 3:50:54 PM Thursday, June 15, 2017

Import Report Summary	
Successful Imports:	1
Import Errors:	0
Total:	1

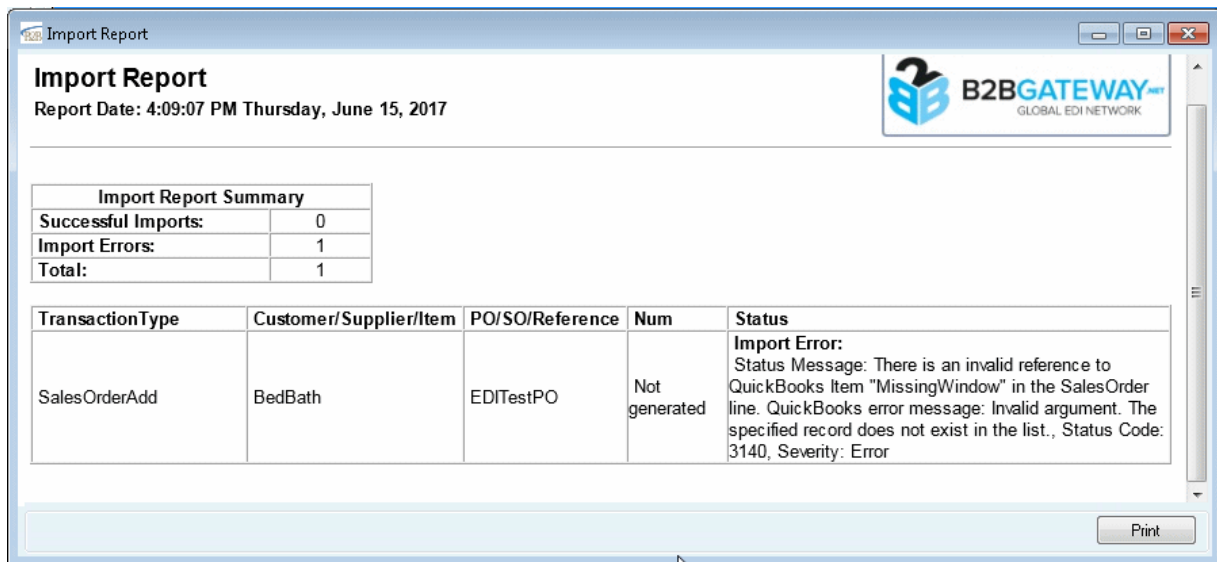
TransactionType	Customer/Supplier/Item	PO/SO/Reference	Num	Status
SalesOrderRet	BedBath	EDITestPO	7083	Imported successfully.

Print

LINE ITEM	Item	Desc	Qty
	Window	Custom Window Item	5

## Handling Import Errors

When transactions are being imported into QuickBooks the information on the Transaction must match what exists within QuickBooks. If there are any discrepancies with the Transaction and QuickBooks, you will be presented with an Error Report.



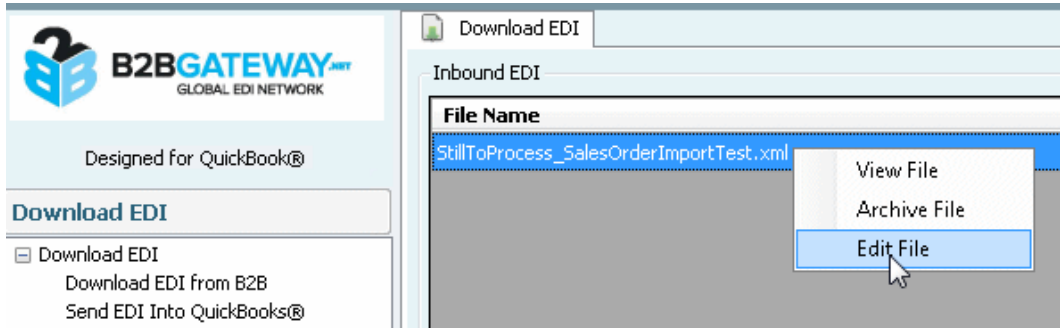
**Import Report**  
Report Date: 4:09:07 PM Thursday, June 15, 2017

Import Report Summary	
Successful Imports:	0
Import Errors:	1
Total:	1

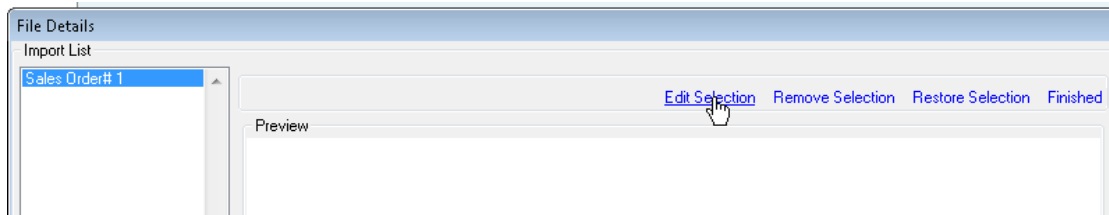
TransactionType	Customer/Supplier/Item	PO/SO/Reference	Num	Status
SalesOrderAdd	BedBath	EDITestPO	Not generated	<b>Import Error:</b> Status Message: There is an invalid reference to QuickBooks Item "MissingWindow" in the SalesOrder line. QuickBooks error message: Invalid argument. The specified record does not exist in the list., Status Code: 3140, Severity: Error

Print

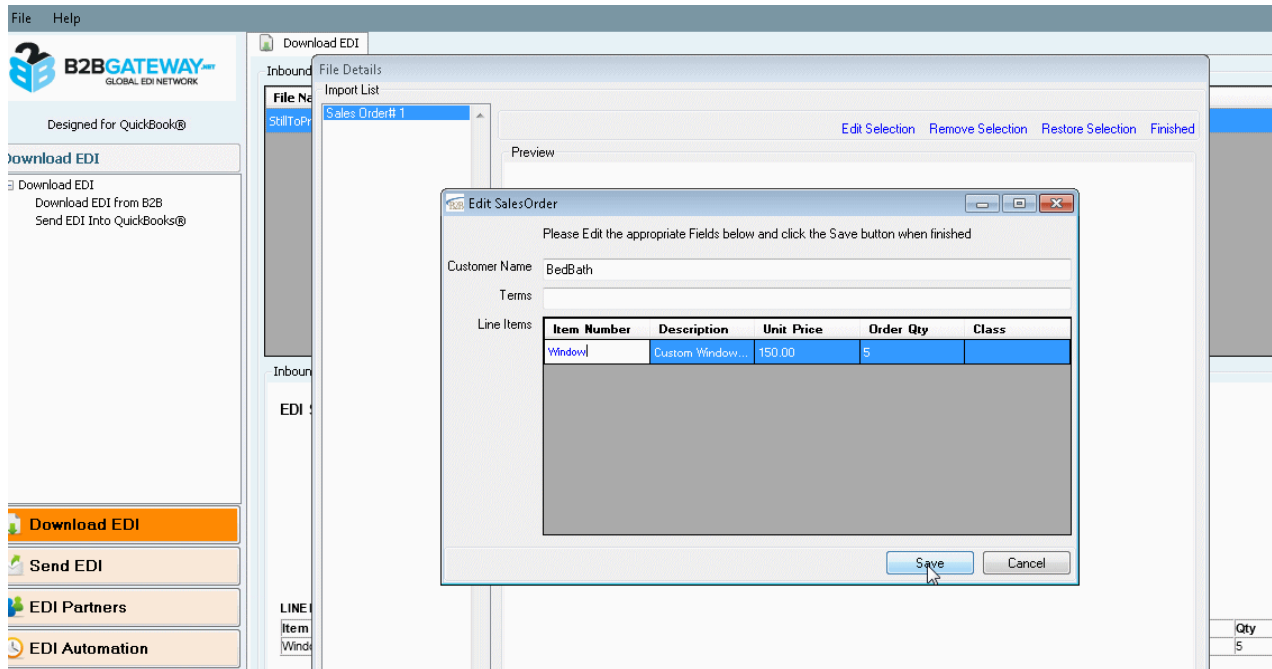
If the error is a Customer Name or Item Error, you can right click the import file and go to the Edit menu.



Select the Import on the Right Hand side and choose Edit Selection



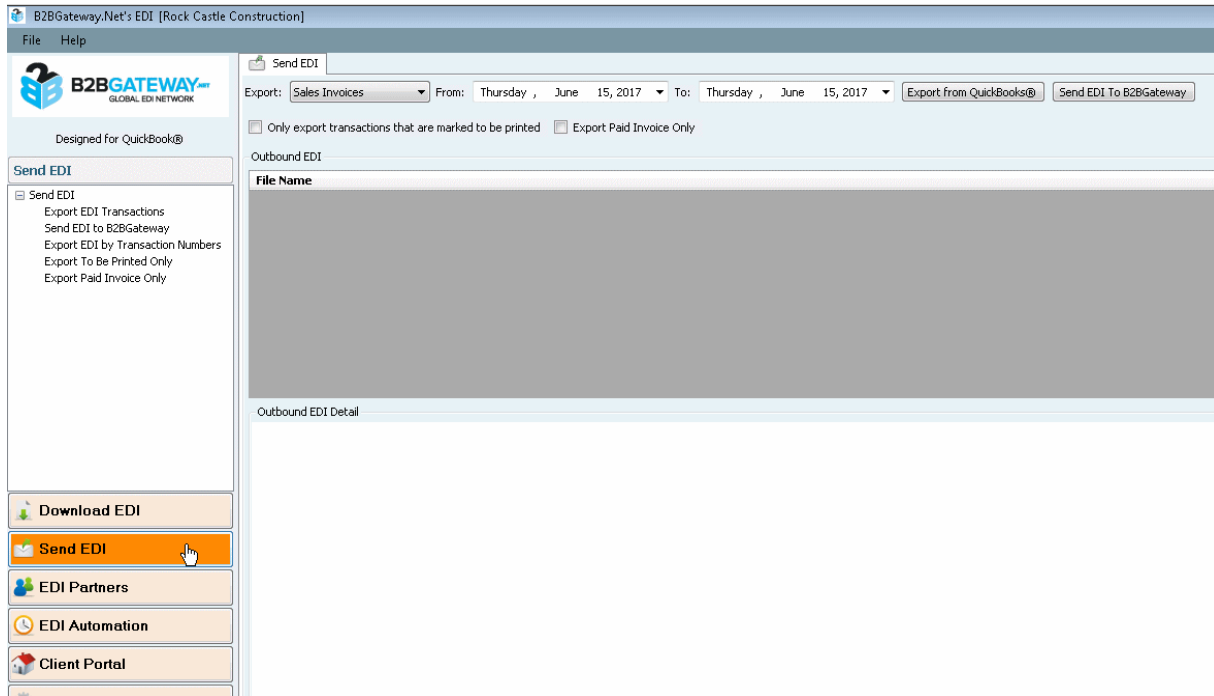
You will now be able to edit the Customer Name or Item Names by double clicking in the Text Box for the particular field. Click Save then the Finished link once completed. Retry the import.



If you continue to have import errors, please contact your assigned Support Engineer for further assistance by logging into your Client Portal and opening a support Ticket.

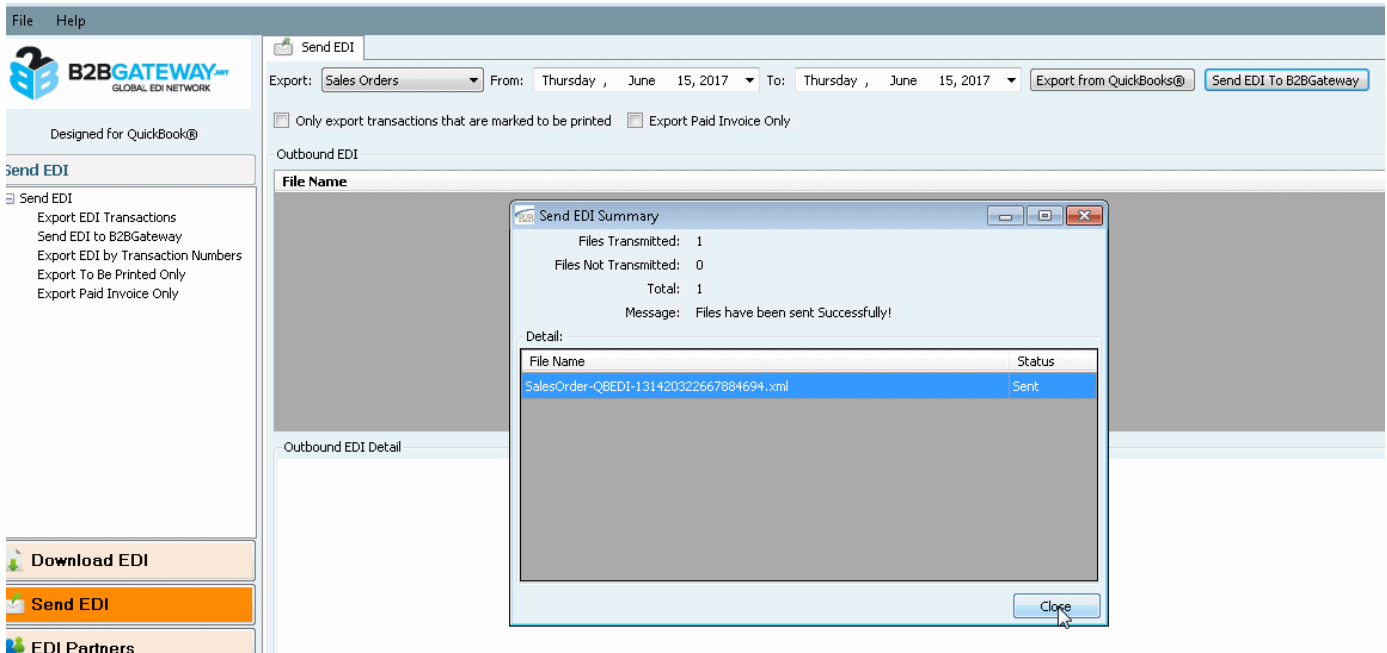
## Sending EDI To B2BGateway

To send QuickBooks transactions to B2BGateway for EDI conversion click on the Send EDI Tab.



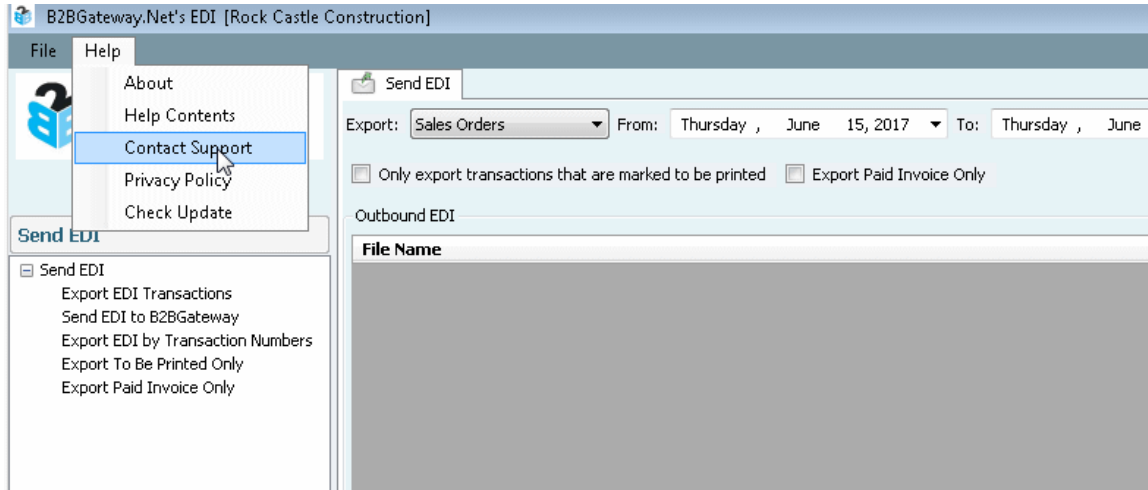
Select the transaction type, the transaction date and click the Export button. The Exported transactions will be listed in the Outbound EDI window. Click the Send EDI To B2BGateway button to transmit the data to B2BGateway.

Once the files have been transmitted, you will be presented with a Transmission Report.

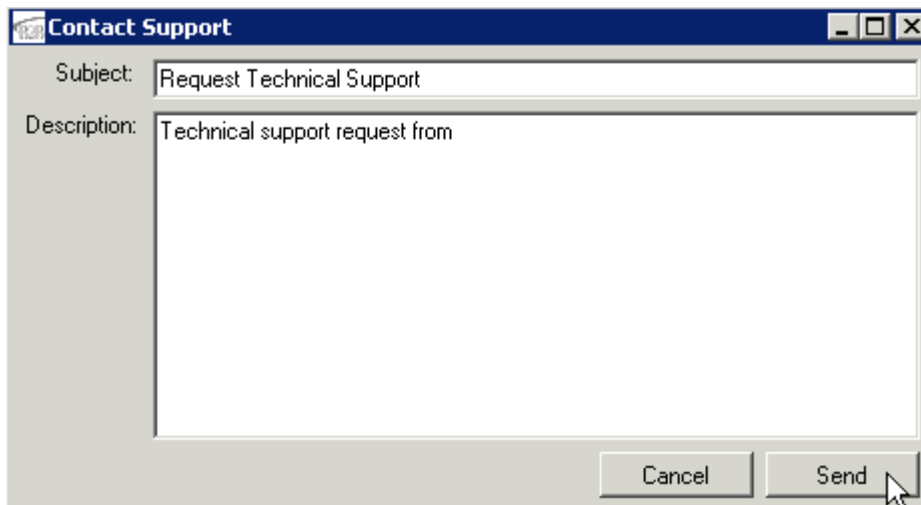


## Contacting Support

In addition to contacting your Support Engineer and the Technical support staff, you have the option to Contact Support from the Help Menu.



Enter a subject and Description for the Support Request and click the Send button.





## **Additional Contact Information**

Main Phone: 1 (401) 491-9595

Web Address: <http://www.B2BGateway.net>

24 Hour Support Phone: 1 (401) 608-2539

24 Hour Support Email: [support@shannonsystems.com](mailto:support@shannonsystems.com)