



# **Scan for QuickBooks Online**

**Version 2.1**

**User's Guide**

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# Preface

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
Thank you for using the Scan for QuickBooks Online integrated Web application. Please read this manual thoroughly before using the product. After reading this manual, store it in a safe place for future reference.


## How to Use This Manual

This manual describes how to use the Scan for QuickBooks Online integrated Web application. Users must have a QuickBooks Online account, and have and know how to use a Web Scan API-enabled Canon imageFORMULA scanner.

## Symbols Used in This Manual

The following symbols are used in this manual to explain procedures, restrictions, and instructions that should be observed for safety.

 **IMPORTANT** Indicates operational requirements and restrictions. Be sure to read these items carefully to operate the machine correctly, and avoid damaging the machine.

 **NOTE** Indicates a clarification of an operation, or contains additional explanations for a procedure. Reading these notes is highly recommended.

## Buttons Used in This Manual

Buttons on the Scan for QuickBooks Online integrated Web application screens that you should click, are circled, and represented as shown below.

Buttons on the QuickBooks Online UI: [Button Name]  
Examples: [Connect]  
[Sign In]

When multiple buttons can be clicked on a screen, all buttons are marked.

Example:

1. Click [Connect].



## Hyperlinks

When this manual is in its native PDF form, the blue underlined text represents a hyperlink to the corresponding sections of this manual or to external Web sites.

For example: See [Chapter 1, "Introduction,"](#) on p. 9.

Likewise, all entries in the Table of Contents are hyperlinks.

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# Chapter 1 Overview

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The Scan for QuickBooks Online integrated Web application enables you to scan directly from your imageFORMULA Web Scan API-enabled scanner to your QuickBooks Online account. This application maintains the many scan functions of your scanner, which allow you to continue to take advantage of certain features, such as Automatic Skip Blank Page, Page Crop, Image De-Skew, and Full Text Optical Character Recognition (OCR).

To use the Scan for QuickBooks Online application with a compatible imageFORMULA scanner, you must install the latest driver for your scanner. Visit [www.usa.canon.com/support](http://www.usa.canon.com/support), and search for your imageFORMULA scanner model to download the latest driver.

To learn more about the supported Scan for QuickBooks Online imageFORMULA scanners, see [“Hardware Requirements,”](#) on p. 11.

## 1.1 System Requirements

This section describes the supported OS (Operating Systems), supported Web browsers, and the required settings that must be set to enable the Scan for QuickBooks Online functions. These requirements are based on the imageFORMULA Web Scan specifications.

### 1.1.1 Supported Operating Systems

As of July 2019, the Windows Operating Systems that are supported, are listed below.

- Windows 7 Professional 32- or 64-bit with the latest updates, and .Net Framework 4.5
- Windows 8.1 Professional 32- or 64-bit with the latest updates, and .Net Framework 4.5
- Windows 10 Professional 32- or 64-bit with the latest updates, and .Net Framework 4.5

As of July 2019, the Mac Operating Systems that are supported, are listed below.

- OS X El Capitan (V10.11 or later)
- macOS High Sierra (V10.13 or later)
- macOS Mojave (V10.14 or later)

## 1.1.2 Supported Browsers and Required Settings

- Google Chrome with the latest updates, and one of the settings below (depends on the version of Google Chrome you are using):
  - [Settings] > [Show advanced settings] > [Content settings] > [Allow local data to be set (recommended)]
  - [Settings] > [Show advanced settings] > [Content settings] > [Cookies] > [Allow sites to save and read cookie data (recommended)]

### IMPORTANT

If you are using a version of Google Chrome prior to 65, and you encounter the NET::ERR\_CERT\_COMMON\_NAME\_INVALID, NET::ERR\_INSECURE\_RESPONSE, or if you have any issues connecting to the scanner, create or set, in the Windows registry:

**[HKEY\_LOCAL\_MACHINE\SOFTWARE\Policies\Google\Chrome]  
"EnableCommonNameFallbackForLocalAnchors"=dword:00000001.**

- Firefox with the latest updates, and this **required** setting:
  1. [Options] > [Privacy] > [History] > set “Firefox will” to ‘Remember history’
  2. In the Address Bar, input “**about:config**”, and then press [ENTER] on the keyboard. If this does not exist, add a new item named “**security.enterprise\_roots.enabled**”, and set the value to ‘True’.
- Safari with the latest updates.

### IMPORTANT

- The browser you are using must support a PDF reader to preview files. Firefox may have a built in reader available, but Chrome requires a reader plug-in, such as Adobe Reader. The built-in Firefox PDF reader may not be capable of reading high-resolution documents.
- If you have issues with any of the browsers above, please be sure to clear the browser’s cache completely. For Chrome, make sure to select the “All time” time range when clearing the browser’s data.

## 1.2 Hardware Requirements

This section describes the supported imageFORMULA scanners that can be used with the Scan for QuickBooks Online integrated Web application.

### Windows Supported Scanners

- imageFORMULA P-208 II Scan-tini Mobile Document Scanner
- imageFORMULA P-215 II Scan-tini Mobile Document Scanner
- imageFORMULA DR-C225 Office Document Scanner
- imageFORMULA DR-C225W Office Document Scanner
- imageFORMULA DR-C225 II Office Document Scanner
- imageFORMULA DR-C225W II Office Document Scanner
- imageFORMULA DR-C230 Office Document Scanner
- imageFORMULA DR-C240 Office Document Scanner
- imageFORMULA DR-M140 Office Document Scanner
- imageFORMULA DR-M160 II Office Document Scanner
- imageFORMULA DR-M260 Office Document Scanner
- imageFORMULA R40

### Mac Supported Scanners

- imageFORMULA P-215 II Scan-tini Mobile Document Scanner
- imageFORMULA DR-C225 Office Document Scanner
- imageFORMULA DR-C225W Office Document Scanner
- imageFORMULA DR-C225 II Office Document Scanner
- imageFORMULA DR-C225W II Office Document Scanner
- imageFORMULA DR-C230 Office Document Scanner
- imageFORMULA DR-C240 Office Document Scanner
- imageFORMULA DR-M140 Office Document Scanner
- imageFORMULA DR-M160 II Office Document Scanner
- imageFORMULA R40

### IMPORTANT

- Visit [www.usa.canon.com/support](http://www.usa.canon.com/support), and search for your imageFORMULA scanner model to download the latest driver.
- If multiple scanners are powered ON and connected to a single PC, the scanner used is selected randomly. If you want to use a specific scanner for Scan for QuickBooks Online, power OFF all other scanners before you launch Scan for QuickBooks Online.

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# Chapter 2 Using Scan for QuickBooks Online

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This chapter describes how to get and use the Scan for QuickBooks Online integrated Web application on a supported imageFORMULA scanner.

## IMPORTANT

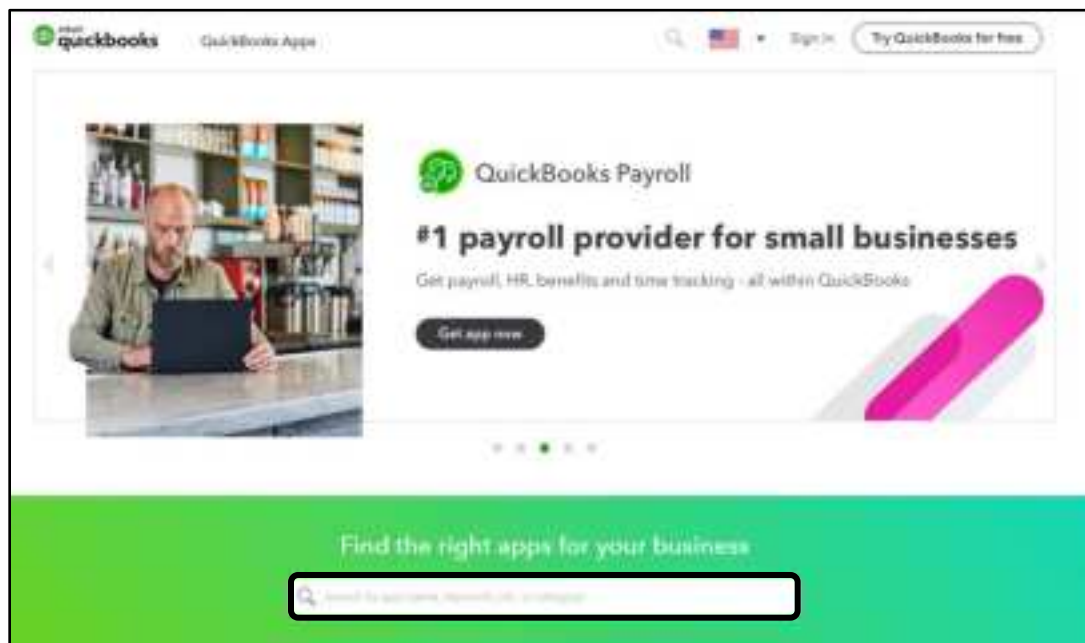
You must have a QuickBooks Online account to use the Scan for QuickBooks Online application.

## 2.1 Getting the Scan for QuickBooks Online Application

This section describes how to get the Scan for QuickBooks Online app to your QuickBooks Online account from the Intuit QuickBooks Online App Store.

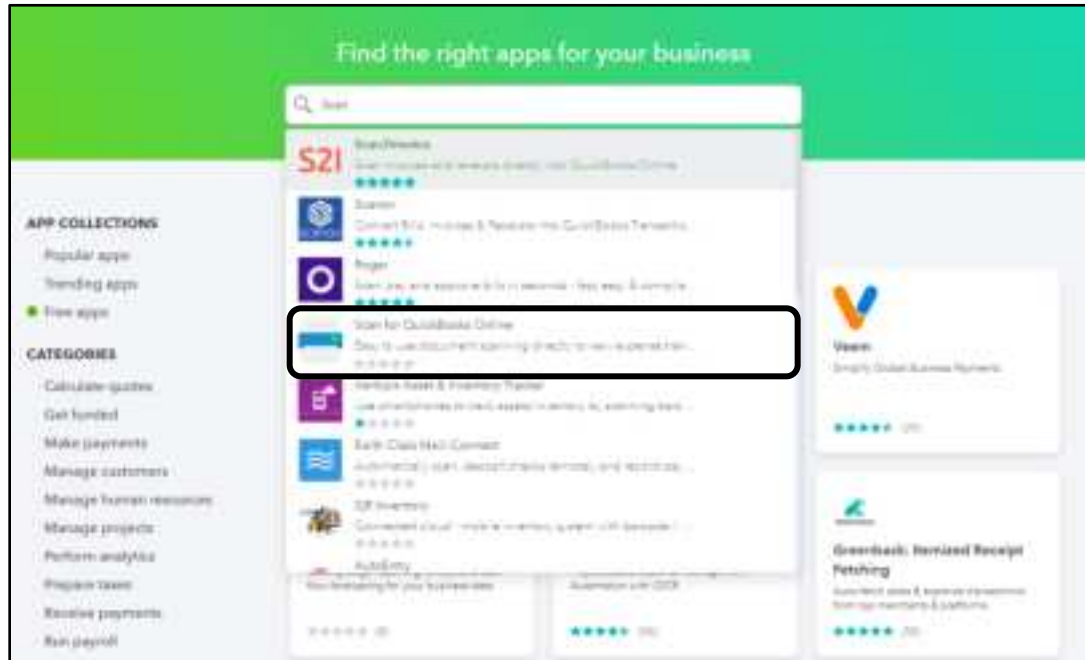
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1. Open a browser window → in the browser's address bar, enter <https://apps.intuit.com/>.
2. Click the [Search] text box → enter **Scan** to search for the Scan for QuickBooks Online app.



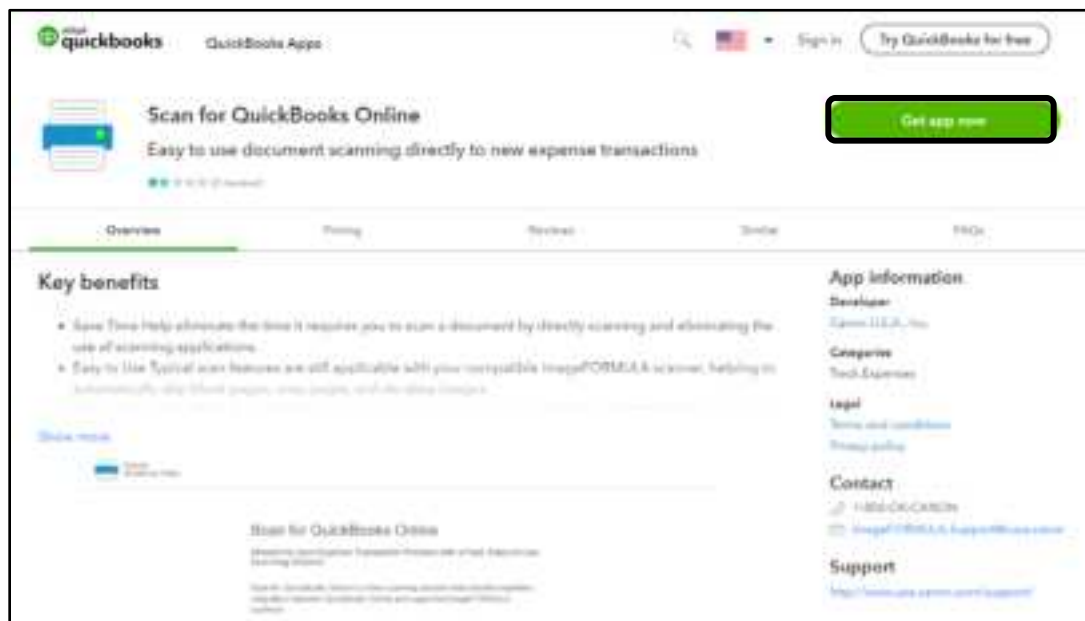
The Scan for QuickBooks Online app appears in the list.

3. Select the [Scan for QuickBooks Online] app.



The Scan for QuickBooks Online application page appears.

4. Click [Get app now].



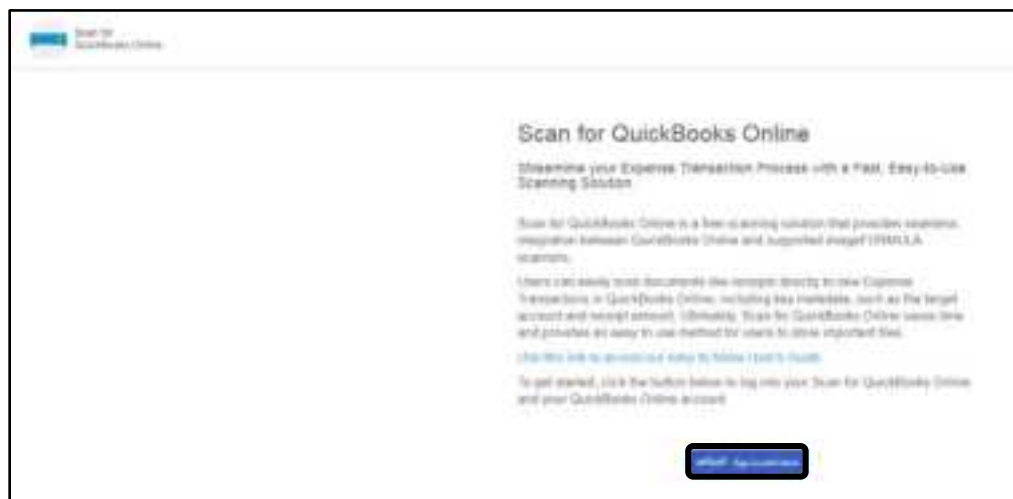
The Scan for QuickBooks Online application is activated.

## 2.2 Signing On to Your QuickBooks Online Account

This section describes how to sign on to your QuickBooks Online account.

---

1. From a supported browser, go to the Scan for QuickBooks Online link <https://scan.ciis.canon.com/scanfor/>.
2. Sign on to QuickBooks Online.
  - 2.1 If there are no users currently signed on to QuickBooks Online, click [Intuit Sign in with Intuit].



The Sign In screen appears.

- 2.2 If you are already signed on to QuickBooks Online from the current browser, click [Connect].




If you have multiple company accounts in QuickBooks, the account selection screen appears. Proceed to step 4. If not, proceed to step 5.

3. Enter your e-mail address or User ID and password in the designated text boxes → click [Sign In].

## Sign In

One account for everything Intuit, including QuickBooks. [Learn more](#)

 Sign in with Google

or

Email or user ID

Password

Remember me

🔒 Sign In

*By clicking Sign In, you agree to our [Terms](#) and have read and acknowledge our [US Privacy Statement](#).*

*Updated on January 1, 2020*

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[I forgot my user ID or password](#)

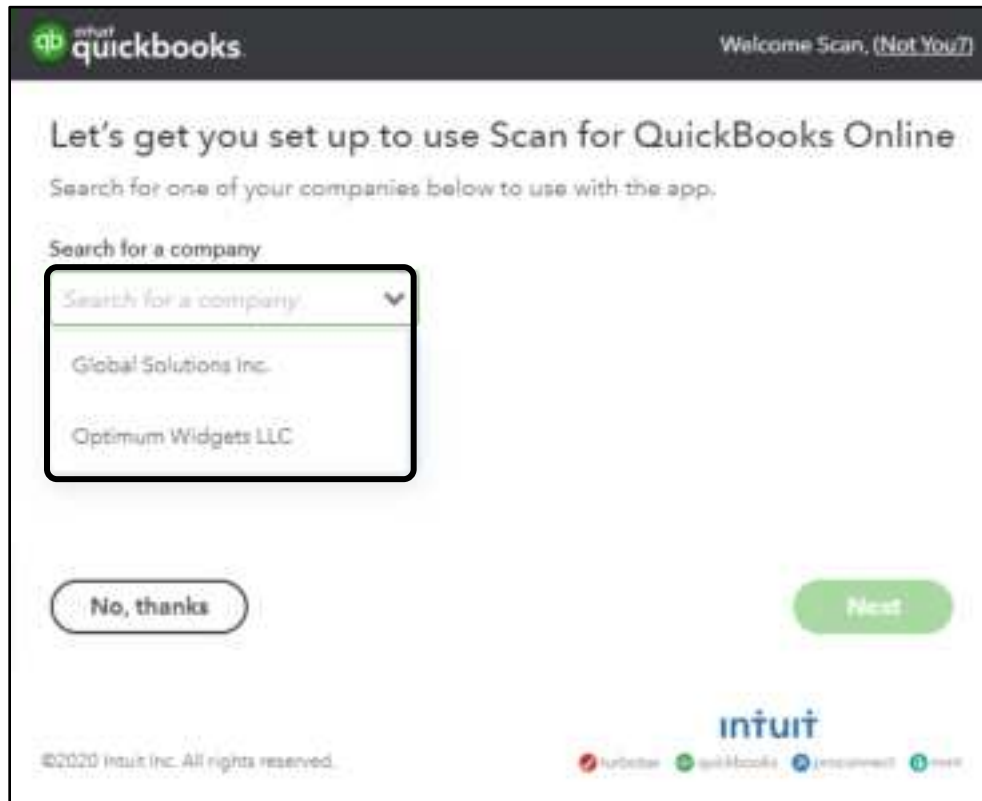
New to Intuit? [Create an account.](#)

The Account Selection screen appears only if the user has multiple accounts. If the user does not have multiple accounts, proceed to step 5.

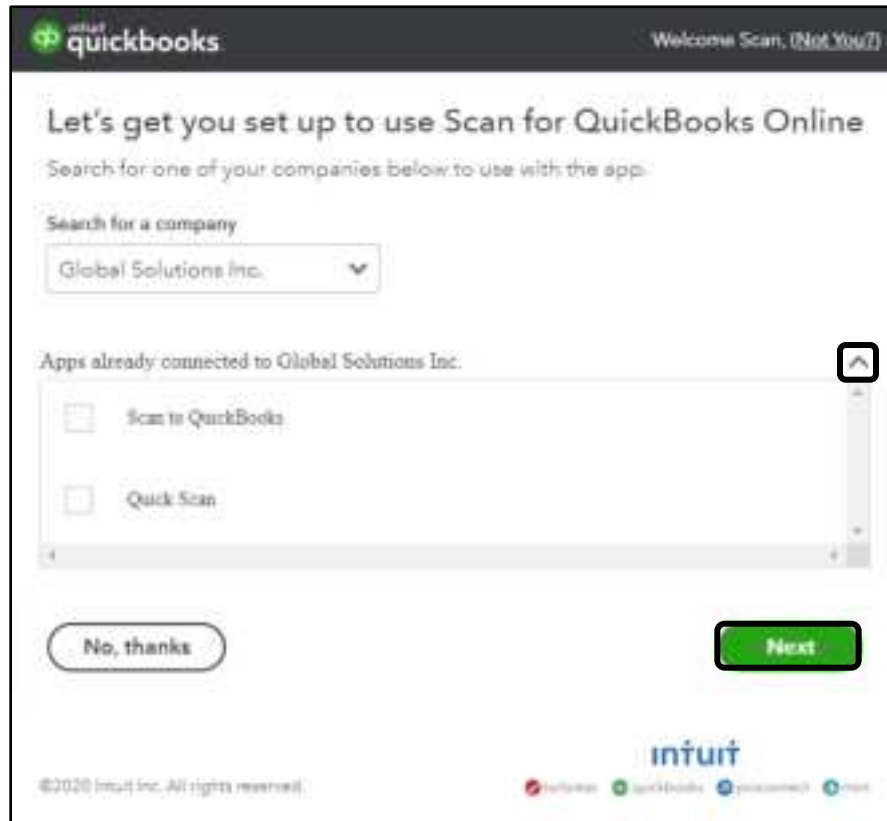


4. Click the [Search for a company] drop-down list → select the company you want to set up to use Scan for QuickBooks Online.

This screen only appears if the user who is logged on to QuickBooks has multiple accounts.



- 4.1 If you want to see which apps are already connected to the company you selected, click [V] → [Next].



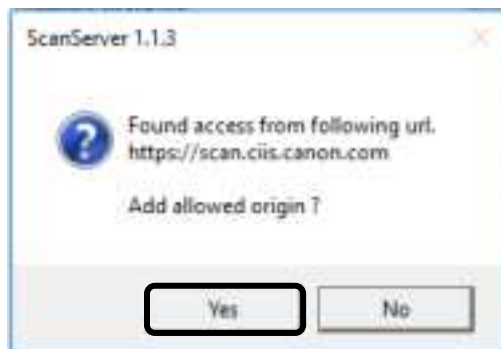
If you do not want to set up the company to use Scan for QuickBooks Online, click [No, thanks].

5. Click [Connect] to scan your documents into your selected QuickBooks Online account, and to allow Scan for QuickBooks Online to view and update your QuickBooks Online data.



If you do not want to scan your documents into QuickBooks Online, and allow Scan for QuickBooks Online to view and update your QuickBooks Online data, click [No, thanks].

If the dialog box below appears, click [Yes]. This allows the Web Scan driver to send data to the Scan to QuickBooks Online URL.



Scan for QuickBooks Online is connected to the selected company.

## 2.3 Scanning a Document to Your QuickBooks Online Account

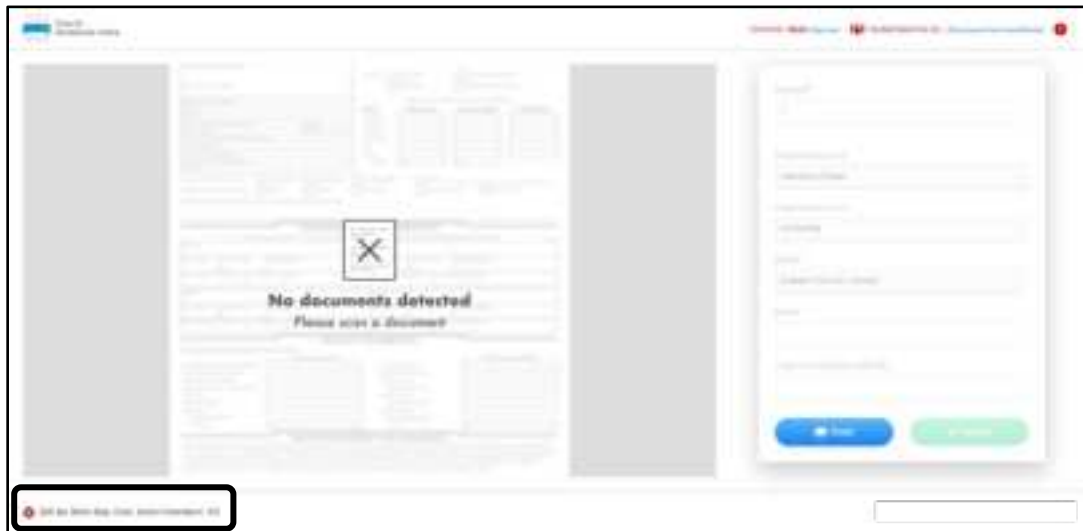
Scan for QuickBooks Online enables you to scan a document from a supported imageFORMULA device to your QuickBooks Online account.

Follow the procedure below to scan a document to your QuickBooks Online account.


1. Make sure that the supported scanner is turned ON → place the document you want to scan into the imageFORMULA scanner.

### NOTE

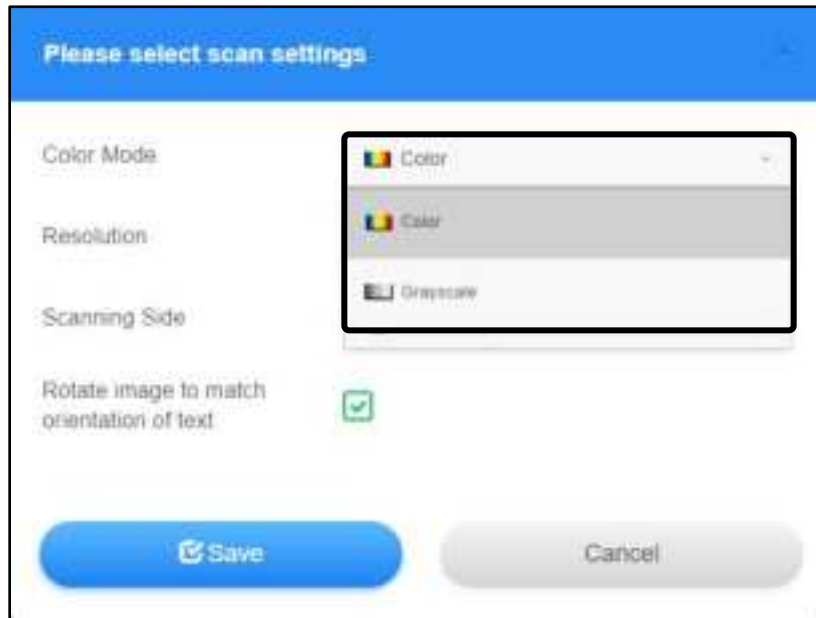
- Make sure that the latest scanner driver that supports imageFORMULA Web Scan is installed.
  - For information on how to place your document into the scanner, see the documentation that came with your machine.
2. Verify the scan settings at the bottom-left of the screen. If the scan settings are OK, proceed to step 3. If not, proceed to steps 2.1 to 2.5 to change the scan settings.



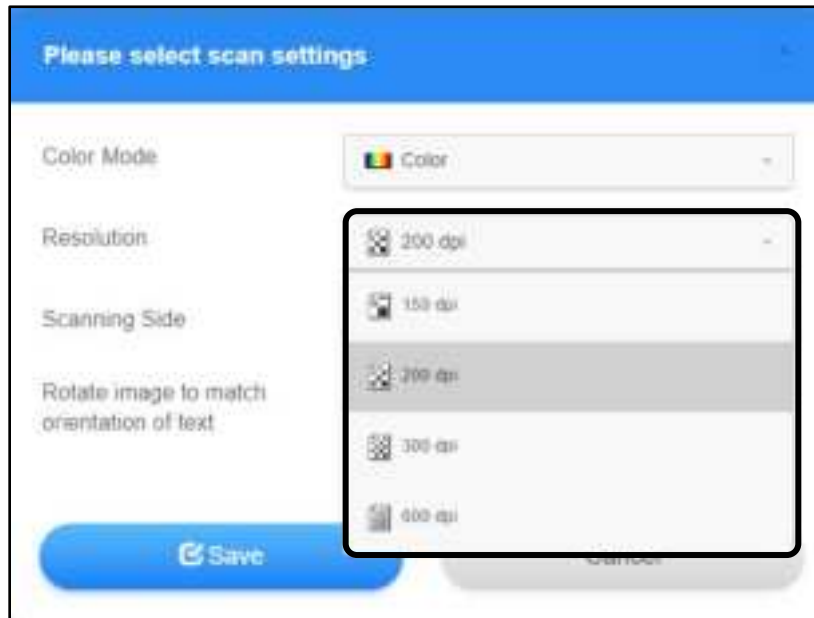
The default scan settings are 'Color', '200 dpi', 'Blank Skip', and the 'Rotate image to match orientation of text' check box is selected.

- 2.1 To change the scan settings, click the Settings icon [].

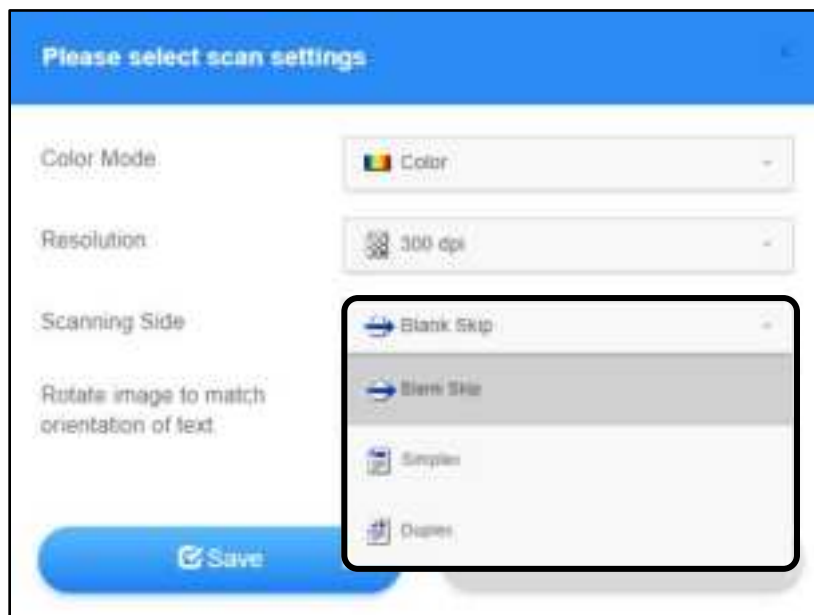
- 2.2 To specify the color mode, click the Color Mode drop-down list → select [Color] or [Grayscale].



- 2.3 To specify the scan resolution, click the Resolution drop-down list → select the desired scanning resolution.

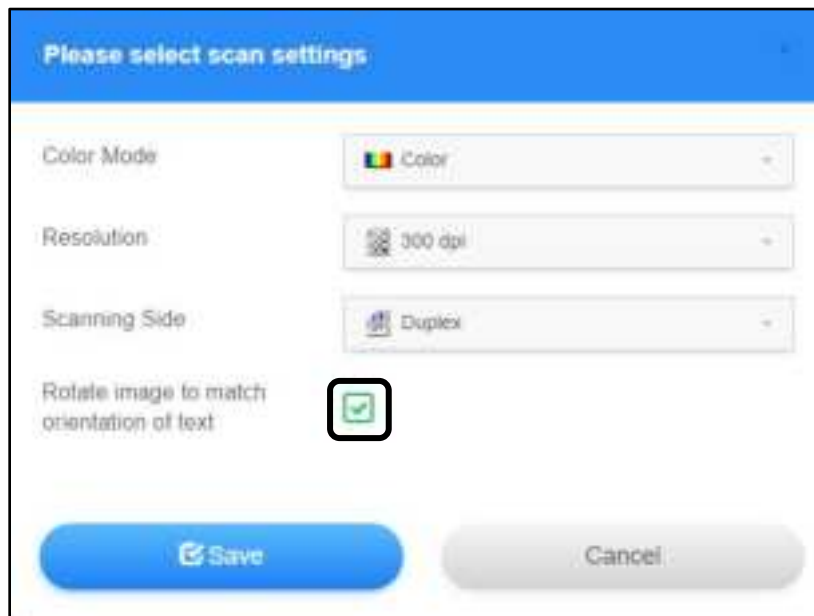


- 2.4 To specify if you want to scan a document in the Simplex or Duplex mode, or scan and skip the blank pages in a document, click the Scanning Side drop-down list → select [Blank Skip], [Simplex], or [Duplex].



- 2.5 If you want Scan for QuickBooks Online to rotate the scanned image to match the orientation of the text in your document, make sure there is a green check mark in the [Rotate image to match orientation of text] check box.

If you do not want Scan for QuickBooks Online to rotate the scanned image to match the orientation of the text direction, click on the check box to clear the check mark.



- 2.6 Click [Save].

The scan settings are saved.

If you do not want to change the scan settings, click [Cancel].

3. Make sure that a supported document scanner is connected → click [Scan].



The maximum file size is approximately 19 MB.

Scanning starts.

If scanning does not start automatically, press the [Start] button on the scanner.



4. Enter the amount of your receipt in the [Amount] text box → enter memo content in the [Memo] text box, if necessary → click [Submit].

All the other fields are grayed out, and are populated with the account detail of the company you selected when you signed on to QuickBooks Online.



If the document was submitted successfully, the message <Transaction successfully uploaded> appears.

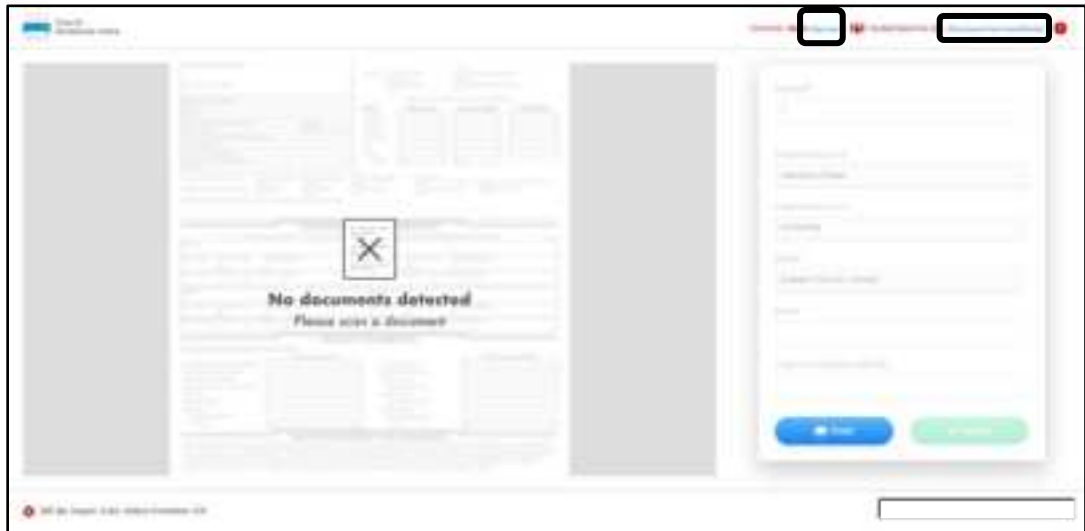
## 2.4 Signing Out of Your QuickBooks Online Account

When you are finished using the Scan for QuickBooks Online application, follow the directions below to sign out of your QuickBooks Online account.

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1. From any screen, click [Sign out].

You can also click [Disconnect from QuickBooks], and then connect to and authorize a different company to perform Scan to QuickBooks Online operations.



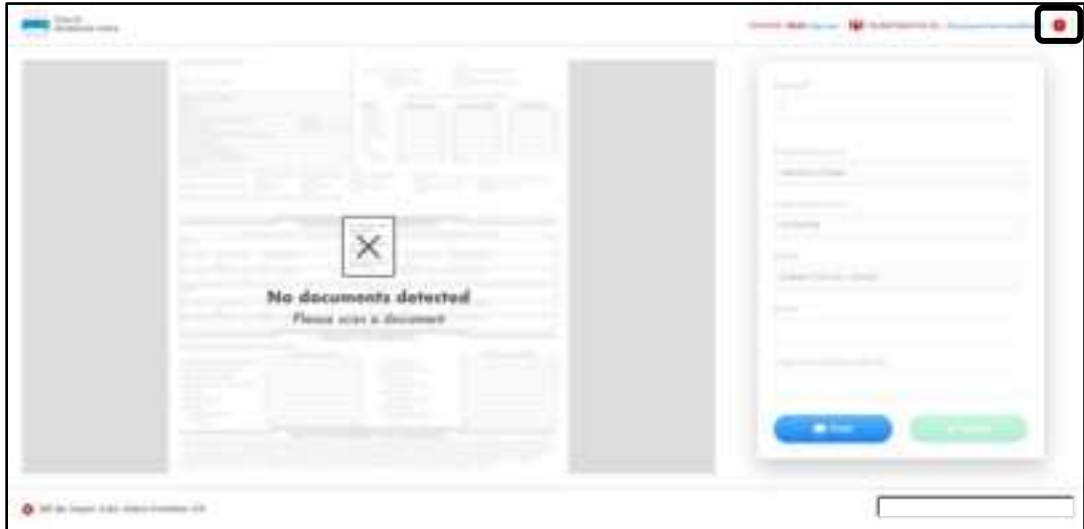
You have signed out of your QuickBooks Online account successfully.

## 2.5 Obtaining Version Information and Help

This section describes how to obtain the Scan for QuickBooks Online app version information, and how to obtain Help with the application.

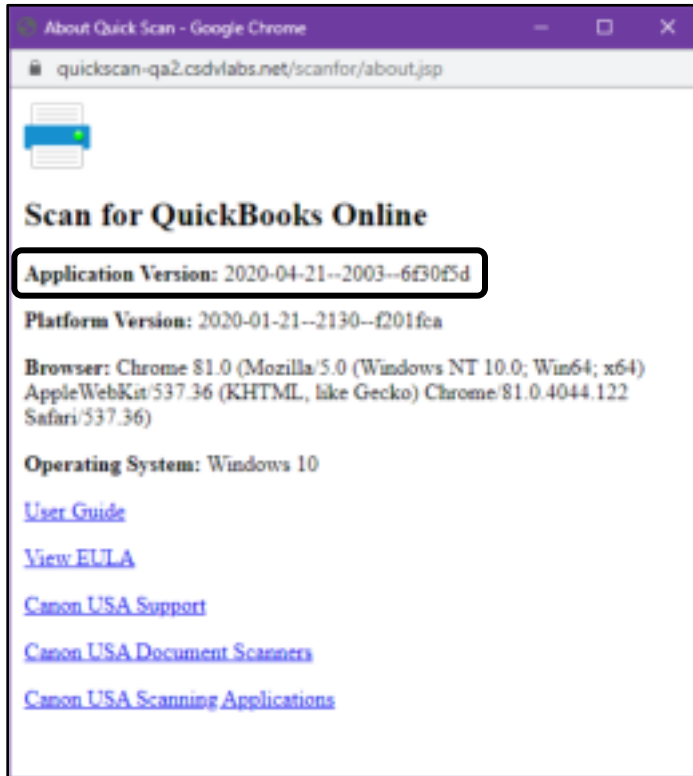
---

1. From any screen, click [  ].



The About screen appears.

2. Confirm the version information.



You can also view the Platform Version, Browser information, License Agreement and User's Guide from this screen.

3. If you want to access to the Canon USA Support Web page, click the [Canon USA Support] link.

The Canon USA Support Web page opens.

4. If want to see information on the available imageFORMULA scanners, click the [Canon USA Document Scanners] link.
5. If you want to see information on the available Canon USA scanning applications, click the [Canon USA Scanning Applications] link.
6. When you are finished viewing the version information, close out of the dialog box.

## Chapter 3 List of Scanning Error Messages

This chapter explains the various messages that appear on the Scan for QuickBooks Online screens, along with possible causes and remedies.

Message	Cause	Remedy
<b>A double feed was detected.</b>	Multiple pages were stuck together during the scan.	Separate the pages, click [Resume], and try to scan again.
<b>Please clear the paper jammed in the scanner.</b>	A paper jam occurred in the scanner.	Clear the paper jam, click [Resume], and try to scan again.
<b>Please close the front cover of the scanner.</b>	The front cover of the scanner has been left open.	Close the front cover of the scanner, click [Resume], and try to scan again.
<b>No scanners were detected.</b>	The scanner may not be turned ON, or connected to your computer properly.	Check to make sure that the scanner's power is ON, and that the USB cable is connected to your computer properly.
<b>The scanner is locked.</b>	The Scan for QuickBooks Online application window was closed before an active Scan operation was completed.	<ol style="list-style-type: none"> <li>1. Power OFF the scanner.</li> <li>2. Click [Resume].</li> <li>3. When the "No scanners were detected" message appears, power ON the scanner.</li> <li>4. Click [Resume] to continue scanning.</li> </ol>
<b>An error occurred attempting to scan.</b>	You may not be using the proper driver for you scanner.	Make sure that the proper driver for your scanner is installed. If the proper driver is installed, log out of your PC, log back in, and then try to scan again. To download the proper driver, go to the <a href="#">Canon Support Website</a> .
	If you are using Firefox, a certificate may not be installed for your imageFORMULA scanner.	<ol style="list-style-type: none"> <li>1. Open Firefox → click [Options/Advanced].</li> <li>2. Locate and select the [Certificates] tab.</li> <li>3. Click [View Certificates].</li> <li>4. In the subsequent dialog box, click [Add Exception].</li> <li>5. Enter the following URL in the [Location] text entry field: <a href="https://localhost:6851">https://localhost:6851</a>.</li> <li>6. Click [Get Certificate], and then [Confirm Security Exception].</li> </ol>
<b>The proper driver for your scanner is not installed.</b>	Scan for QuickBooks Online detected that the proper driver for your scanner has not been installed.	Go to the <a href="#">Canon Support Website</a> , download the proper scanner, reboot your computer, and then try to scan again.

Message	Cause	Remedy
<b>Scanner is not responding, check card, power, and cables.</b>	The scanner may not be turned ON, or connected to your computer properly.	Check to make sure that the scanner's power is ON, and that the USB cable is connected to your computer properly.
<b>A network error occurred transferring the scanned document.</b>	File sharing may be blocked by your local or network firewall.	For Local Firewall: <ol style="list-style-type: none"> <li>1. Disable your firewall (temporarily).</li> <li>2. Use the Scan for QuickBooks Online app to scan your document again.</li> <li>3. Re-enable your firewall.</li> <li>4. If the scan to QuickBooks Online succeeded, follow your firewall instructions to enable File Sharing for box.com and .boxcdn.net.</li> <li>5. If the scan to QuickBooks Online failed with the same issue, follow the "For Network Firewall" instructions below.</li> </ol>
		For Network Firewall: Ask your IT group to change the network access policy to enable File Sharing for box.com and boxcdn.net.
<b>Error before driver operation</b>	An error occurred between the driver and scanner.	Check that the scanner is properly connected and working with another application, such as CaptureOnTouch.
<b>An unknown error occurred.</b>	The scanner driver reported error code -xxxx. (Where 'xxxx' is the actual error code.)	Reboot your PC, and reconnect to Scan for QuickBooks Online, and then try to scan again.
	You cannot preview the scanned document.	Verify that your browser is capable of viewing PDF files. Install a PDF reader, if needed.
	You cannot preview a fully scanned document in Firefox.	Install a new PDF reader that supports the Firefox Web browser.