

Ready, Set, Scan!



What you'll learn

This guide will show you how to use a TWAIN-compliant scanner to scan a document into SmartVault and attach it to an entry in QuickBooks.

What you'll need

- A PC with Internet access running Windows XP, Windows Vista or Windows 7
- A TWAIN-compliant scanner (learn more at <http://www.twain.org/>)
- A valid SmartVault User ID and password (your user ID is the email address you signed up with)

Step 1: Get ready

1. Verify that the SmartVault Desktop Software is installed and you are signed in.

If you see the SmartVault icon in your systray (usually located on the bottom right of your screen), the SmartVault Desktop Software is installed. It looks like this when you are signed in:

If the SmartVault icon is there but is black, right click the icon and select **Sign In**.

If you do not see the SmartVault icon, verify that SmartVault is installed by checking your Start Menu under Programs for a SmartVault program group. If the application is not installed, see how to [Configure the SmartVault Desktop Software](#).

2. Verify that your company file has been added to SmartVault.

Run QuickBooks and open your company file. You are ready to go if the SmartVault Toolbar appears on the right side of the QuickBooks window. If you see an icon labeled **Add Company**, you can click it to add the company file to your SmartVault account. If you see an empty toolbar, please contact your QuickBooks administrator for assistance.

Step 2: Scan a document

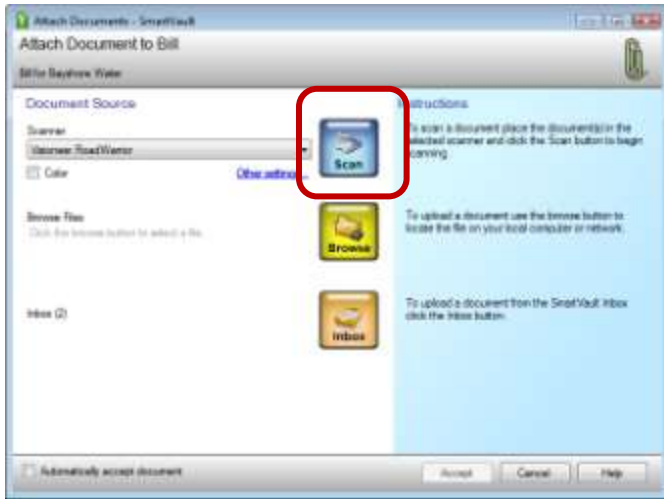
1. In QuickBooks, find an entry where you want to attach the document and open it.

This can be a bill, invoice, bank account, employee, vendor, or other type of entry. You can attach to 30 types of transactions. See [Supported QuickBooks Entries](#).

2. Click the Paperclip icon on the SmartVault Toolbar.



3. Place a document in your scanner and click the Scan button



4. Click Accept to attach the document.

You will see a preview of the image. You can change the document name and description if desired.

5. Your document is uploaded to your SmartVault account.

The document is uploaded to our secure data center and is now available for anyone running QuickBooks. It can also be accessed using a web browser by visiting the [SmartVault Portal](#).

The document count on the folder tells you how many documents are associated with the current QuickBooks entry. Click the folder icon to see all documents.



More scanning options

You can also scan documents into the **SmartVault Inbox**, even without running QuickBooks, by clicking the shortcut on your desktop. Documents in the Inbox can be attached to transactions using the Paperclip icon.

If you have a Fujitsu ScanSnap scanner, see how to [Configure a Fujitsu ScanSnap Scanner](#) 🖨️.

Need more help?

For help with the product, see the [Quick Start Guides](#), on-line [Product Documentation](#), watch [Product Demos](#), or contact support at support@smartvault.com. Our corporate site can be found at <http://www.smartvault.com>.

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