

## How to use the Dropbox integration for Purchases.

There are 2 ways to add Purchase Invoices to your Dropbox file – Either by installing the Dropbox desktop application or by uploading them via the dropbox website. [We will first show you how to upload files in general to Dropbox before showing you what to do to upload Purchase Invoices for SortMyBooks Online.](#)

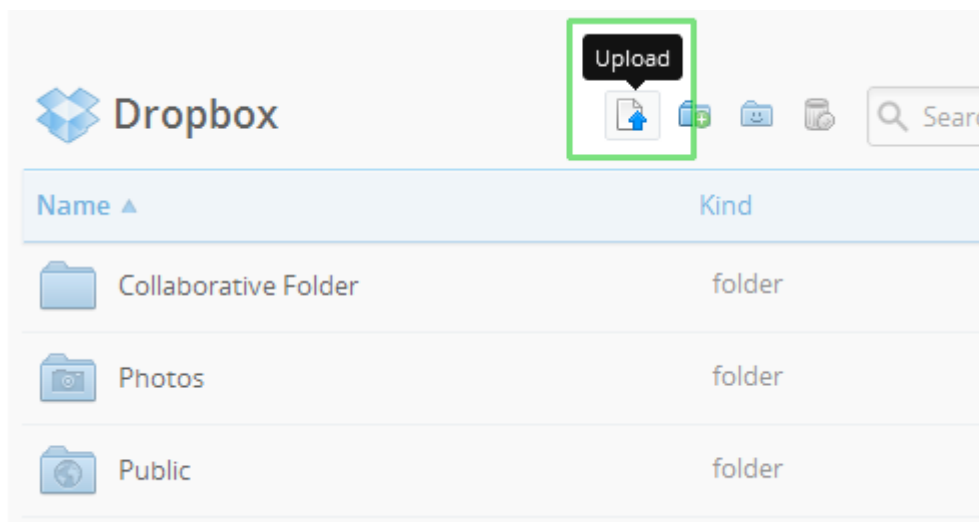
### Desktop Application:

First, make sure you [install the Dropbox desktop application](#). It creates a new folder on your computer called “**Dropbox**.” Your Dropbox folder works just like any other folder on your hard drive, except everything in your Dropbox folder automatically syncs to the web and to any other of your computers with Dropbox installed. [After installation on Windows, a My Dropbox folder will be located inside your My Documents folder by default.](#)

It's easy to add files to Dropbox. **Move your files into your Dropbox by dragging and dropping them into your Dropbox folder.** That's it. The files in your Dropbox folder will automatically be synced online and to your other computers. You don't have to do anything. You can even use the “**Save As...**” menu option in most applications to save files directly to your Dropbox folder.

### On the Dropbox website:

1. Sign in to the Dropbox website
2. Click the *Upload* button from the very top of the window



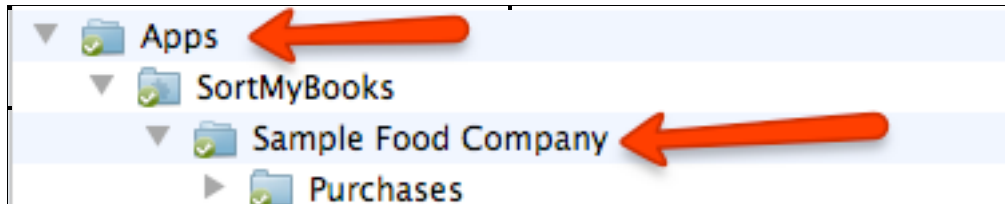
3. A window will appear. Click the *Choose File* button and then select the file on your computer that you'd like to add to your Dropbox.
4. Choose as many files as you like, and then click the *Start Upload* button

The window will disappear, your files will start uploading, and you'll be shown a progress indicator. That's it, you've added files to your Dropbox!

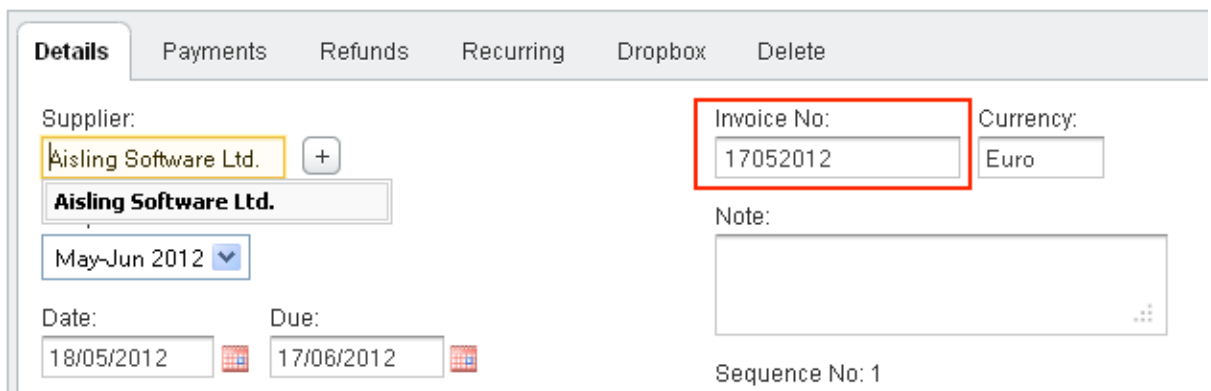
## How to use the Dropbox integration – pt 2

Now that you know how to upload files to Dropbox there are a couple of extra steps necessary to upload files that can be linked with your Purchase Invoices.

When you integrate SortMyBooks with Dropbox a series of folders will be created in your Dropbox folder:



1. Make sure that you save your Purchase Invoice in your Dropbox folder as above. Note if you have integrated more than one of your Companies on SortMyBooks then there will be a separate folder for each company. Save your invoice into the folder for the correct company and then see the next step for how to name your Purchase Invoice file.
2. The Purchase Invoice can be in any format – Word Doc, PDF, Image File, etc. Make sure it is saved with the Invoice Number as the file name (you can add the name of the Supplier too if you want.) In our example the file is called 17052012 – Aisling Software.  
**NOTE:** There are certain characters that can't be used in the file name on Dropbox. These are \ / : \* ? " < > | If your invoice number contains these characters then you will need to remove them from the file name and when you enter the Invoice Number on Dropbox.
3. When you enter the invoice on SortMyBooks, make sure the invoice number is entered the same as the file – e.g. 17052012.

A screenshot of the SortMyBooks invoice details form. The form has tabs for 'Details', 'Payments', 'Refunds', 'Recurring', 'Dropbox', and 'Delete'. The 'Details' tab is active. The 'Supplier:' field contains 'Aisling Software Ltd.' with a dropdown menu showing 'Aisling Software Ltd.' and a date range of 'May-Jun 2012'. The 'Date:' field is '18/05/2012' and the 'Due:' field is '17/06/2012'. The 'Invoice No:' field is highlighted with a red box and contains '17052012'. The 'Currency:' field is 'Euro'. There is a 'Note:' field and a 'Sequence No: 1' field.

4. Enter the invoice details as normal and save the invoice.

5. Click back into the invoice and click on the “Dropbox” tab. The system should have matched the invoice number to the document and will display it below to be viewed/downloaded.

The screenshot shows a web interface with a navigation bar at the top containing the following tabs: Details, Payments, Refunds, Recurring, **Dropbox** (highlighted with a red border), and Delete. Below the navigation bar, the text reads "There are 1 files found your match". A file entry is displayed with the text "[download here](#) - 17052012 Aisling Software.docx" and "9.7 KB" below it. To the right of the file name is a "Download" button. At the bottom of the interface, there is a row of four buttons: Duplicate, Preview, History, and Credit Note.