improveit 360 QuickBooks Online Integration Guide

QuickBooks Online Integration FAQs

Why Integrate QuickBooks Online and improveit 360?

Using the improveit 360 QuickBooks Online integration tool will allow your business to save time and money by moving all customer, sale, and receipt information from improveit 360 into your organization's QuickBooks Online workbook. Once you enter sales and receipts into improveit 360, you can automatically bring that data over into QuickBooks Online with the click of a single button!

How much Setup is involved?

One time setup up of the QuickBooks Online integration takes only a few minutes. Once the QuickBooks Online Integration tool has been added to your system, simply enter your QuickBooks Online login information into improveit 360, authorize the connection in between the two systems and sync your information.

What Data is brought over into QuickBooks Online?

Customers, Sales, and Receipts are all brought over into QuickBooks Online via the integration tool.

- **Customer Information:** Customer name (first and last) and their balance due
- **Sale Information:** Customer name, Sale Date, Sale Amount, Balance Due, and Products sold.
- **Receipts and Adjustments:** Customer name, receipt number, received date, payment method, and the payment amount.

QuickBooks Online Integration FAQs

How long does it take to Move Data?

The answer to this question depends on how often you push information from your improveit 360 organization into QuickBooks Online. If data is pushed once each day, the process will be quick and should only take a minute or two. If you wait several weeks before pushing data, more data will likely need to be moved, resulting in longer processing times.

Is the QuickBooks Online Integration 1 way or 2 way?

The QuickBooks Online integration is a one way integration that only moves data entered in your improveit 360 system into a QuickBooks Online workbook that you specify. The integration does not move information from QuickBooks Online into your improveit 360 system.

How do I begin using the QuickBooks Online Integration?

To begin using the QuickBooks Online Integration tool, follow the setup steps outlined in the following pages.

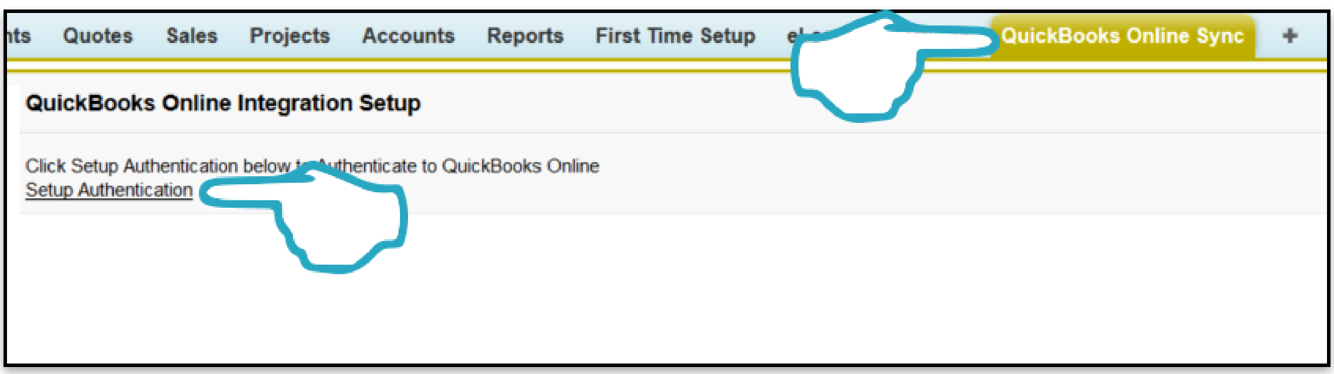
QuickBooks Online Integration Setup

Preliminary Requirements

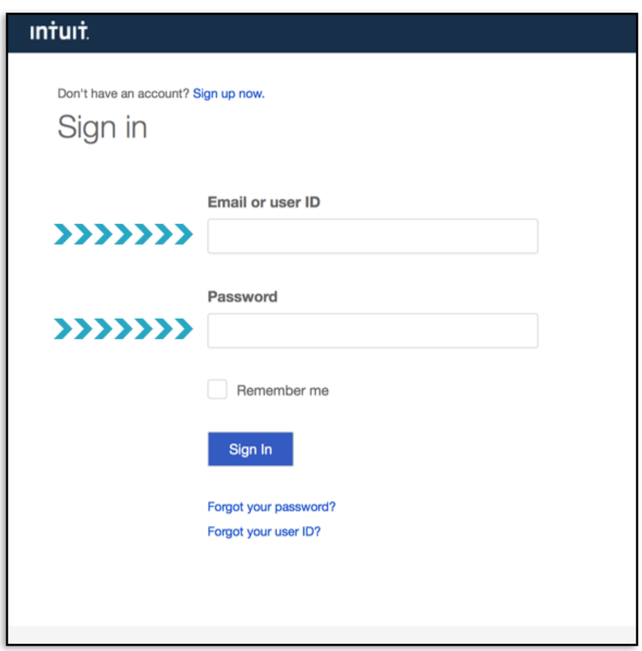
Before beginning the process of setting up the QuickBooks Online integration tool make sure to contact your Account Manager. A special package must be installed to add the tool to your system.

Connecting your QuickBooks Online workbook

Once the QuickBooks Online tool has been added to your system you can now connect your QuickBooks Online workbook with improveit 360. Click on the 'QuickBooks Online Sync' tab in your improveit 360 system and click on 'Setup Authentication'.

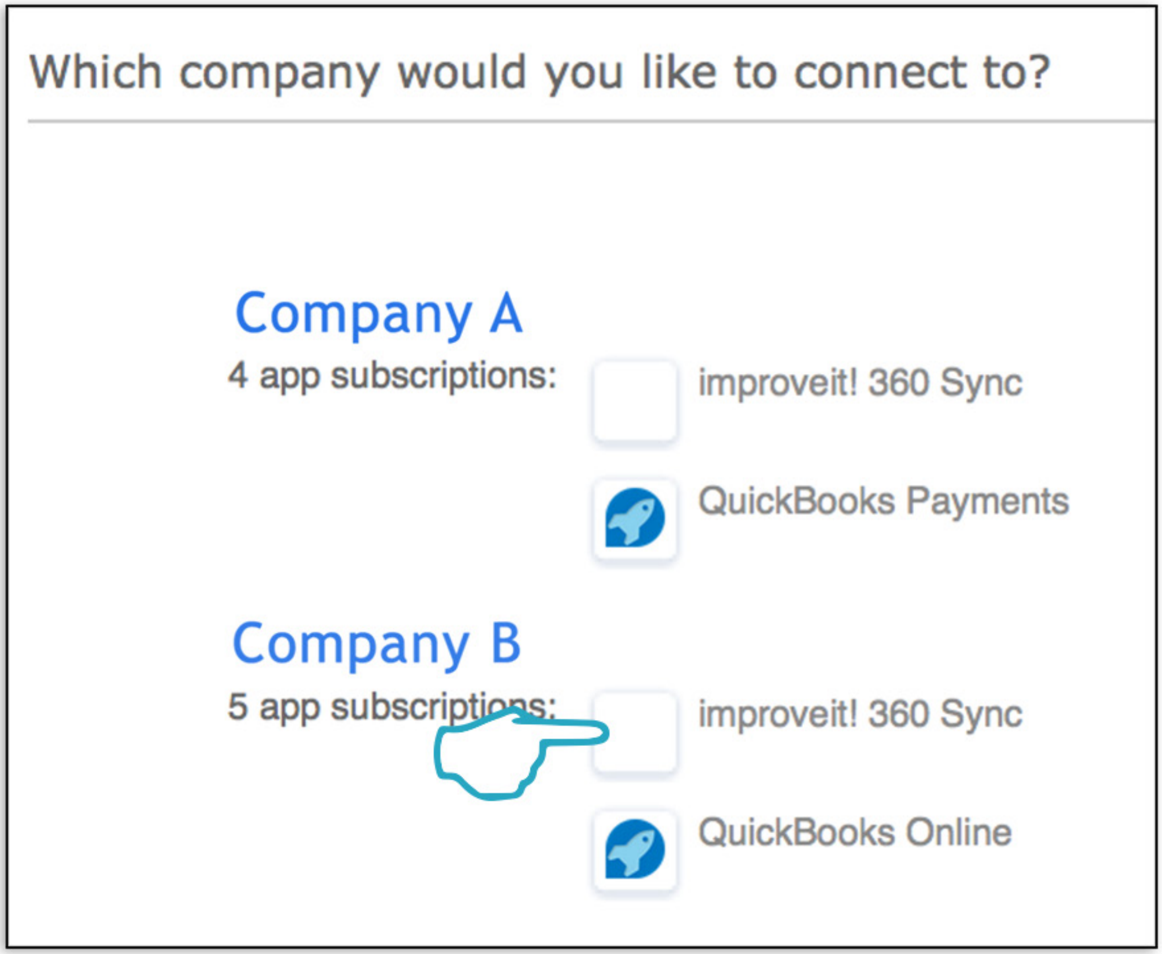


Enter your QuickBooks Online Username and Password and click 'Sign In'.



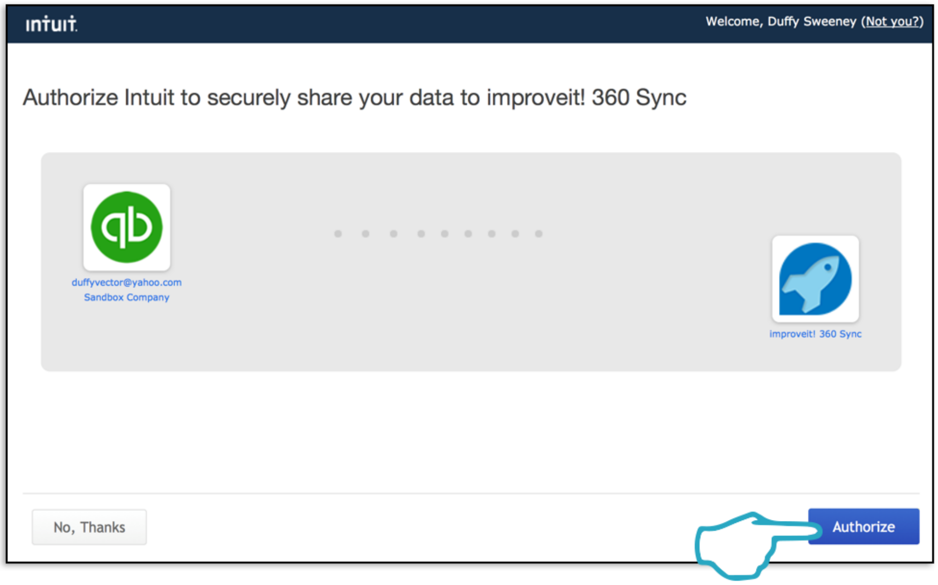
QuickBooks Online Integration Setup

If you are using multiple workbooks within your QuickBooks, select the workbook you would like to sync with.

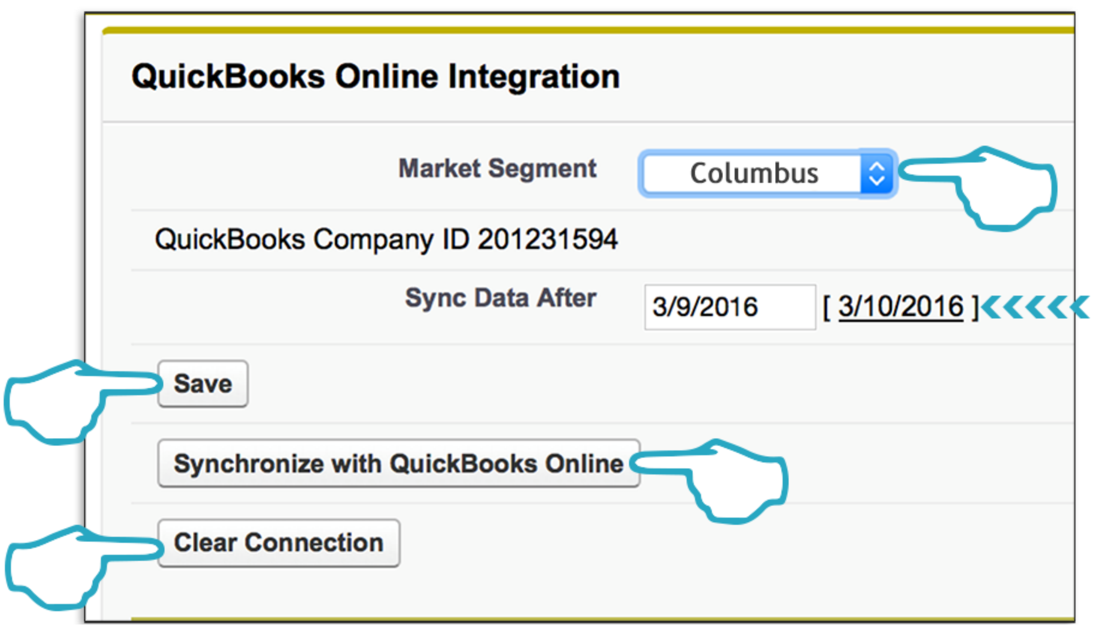


QuickBooks Online Integration Setup

Authorize the secure connection in between improveit 360 and your QuickBooks Online workbook by clicking 'Authorize'.

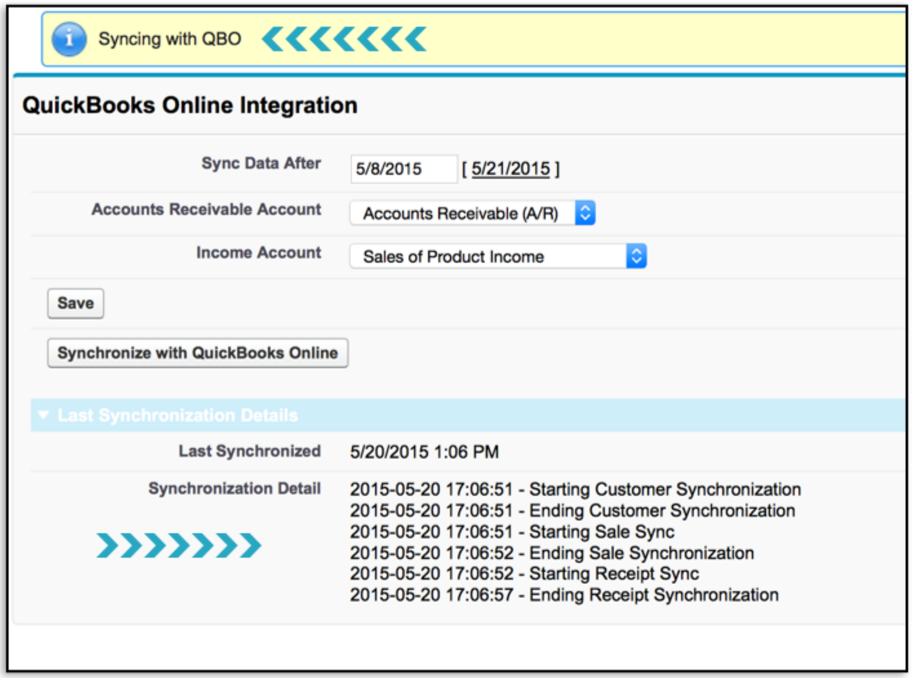


Now that the connection has been made, select a 'Market Segment' if you would only like to push information associated with a specific 'Market Segment' into your selected workbook. If you would like to only sync information on or after a specific date [the Sold On Date], select a date next to 'Sync Data After'. Click 'Save' to maintain these settings for future use. Once your settings are in place click 'Synchronize with QuickBooks Online' and the sync will begin. If you are tracking different 'Market Segments' in different workbooks, click 'Clear Connection' after you are done syncing and repeat the same process for any additonal workbooks.



QuickBooks Online Integration Setup

You are notified that the Sync has begun by a banner at the top of the page. The Synchronization Details will appear at the bottom of the page showing when each phase of the sync started and ended.



Once the tool has successfully pushed information from your improveit 360 system, you can view the information in your QuickBooks Online workbook.