



Training: QuickBooks Desktop

QuickBooks Desktop One-way Sync

This tool is designed to alleviate some double data entry between improveit 360 and QuickBooks. The tool will move Prospects, Sales and Receipts & Adjustment records to QuickBooks as long as the record meets the designated criteria.

Setup Details

QuickBooks desktop sync tool must be installed on the computer or server where the client's instance of QuickBooks is located. Follow the [QuickBooks Integration Guide](#) to install the tool.

Common Use Cases vs Outliers

Most clients use the standard QuickBooks desktop integration, while there are a few customers who have a custom version of this tool. Particularly, any Supportworks or Contractor Nation dealer will use a custom version of the sync tool specifically designed for the Supportworks dealer network. Within the Supportworks network there is an individual outlier, Thrasher. Thrasher has their own custom version of the QB sync tool, unlike any other dealer.

Common Troubleshooting Exercises

Follow along with [QuickBooks Error Troubleshooting 2020](#) for the most common QB errors, what they mean and how to troubleshoot them.

Internal Supporting Documentation

- [QuickBooks Integration Diagram](#)
- [QuickBooks Integration Guide](#)
- [QuickBooks Error Troubleshooting 2020](#)
- [i1360 Troubleshooting Guide 2013](#)
- [QuickBooks Field Mapping](#)
- [QuickBooks customer-facing marketing slick](#)

“IS THERE A WAY TO ADD THE QUICKBOOKS CLASS TO OUR RECEIPT & ADJUSTMENT RECORDS, WHEN THAT RECEIPT IS TIED TO A PROJECT THAT HAS A QB CLASS?”

-Kali Robertson, Thrasher

