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QuickBooks Online Integration With Accelo

Keep your billing and production teams on the same page

Learn more about Accelo's Quickbooks Integration

Keep your billing and production teams on the same page by automatically syncing invoices and payments between your Accelo and QuickBooks accounts.

Using this guide, you can:

Connect your QuickBooks Online account to Accelo

Import your customers and invoices from QuickBooks Online

Customize the integration by choosing your Sync Preferences

Record payments

Understand what information syncs between Accelo and Quickbooks Online

What does the QuickBooks integration actually do?

Imports current and historical customers from QuickBooks into Accelo

Imports historical invoices from QuickBooks into Accelo

This includes sales receipts

Accelo **does not** sync delayed charges

Imports tax and ledger codes for more accurate invoicing in Accelo

Syncs new purchases which are created or edited in Accelo

Syncs new invoices which are created or edited in Accelo to QuickBooks

Syncs those invoices' contact information with Accelo and QuickBooks

Syncs those invoices' payments with Accelo

Delete the invoice in QuickBooks when the associated invoice is deleted in Accelo

How does Accelo's synchronization work?

When an invoice is created in either system, Accelo will automatically check for a corresponding contact in the opposite system. If a matching contact is found, then we'll list the new invoice under that contact. If no matching contact is found, we'll automatically create a new contact for you. With that invoice we'll also sync several key data points, which include:

The contact's First and Last Name

The contact's Company/Client

The contact's physical Address, Email Address and Phone number

The Invoice Title and Description

Individual line item Descriptions, Subtotal, and Tax Amounts

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Payment Amounts, Method Accounts, Dates and recording Staff Person

The invoice's customer-facing Notes

The invoice's internal-facing Internal Notes

NOTE: When importing Invoices from Quickbooks Online to Accelo, we do **NOT** support services or materials that are attached to a bundle.

Connecting your QuickBooks Online account to Accelo

Important things to note before integrating your accounts:

Connecting your QuickBooks account will begin automatically syncing new invoices which are created in Accelo to Quickbooks.

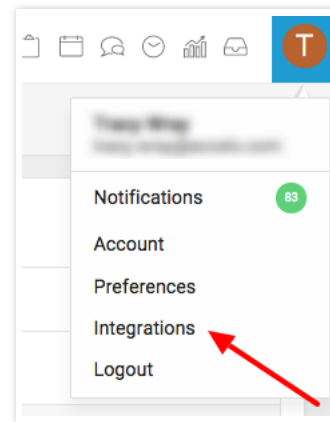
Connecting your QuickBooks account will not import any previous invoices to Accelo automatically. You will have the option to Import previous invoices manually after you've connected.

Only an Accelo Administrator is able to connect to QuickBooks

Only a Quickbooks Administrator is able to authorize the integration within QuickBooks.

To connect your QuickBooks account:

1. Navigate to your Integrations page by clicking your **User Profile** Icon in your **Navigation Bar** and selecting **Integrations**.



2. Locate the **QuickBooks** tab and click the **Connect With QuickBooks** button.

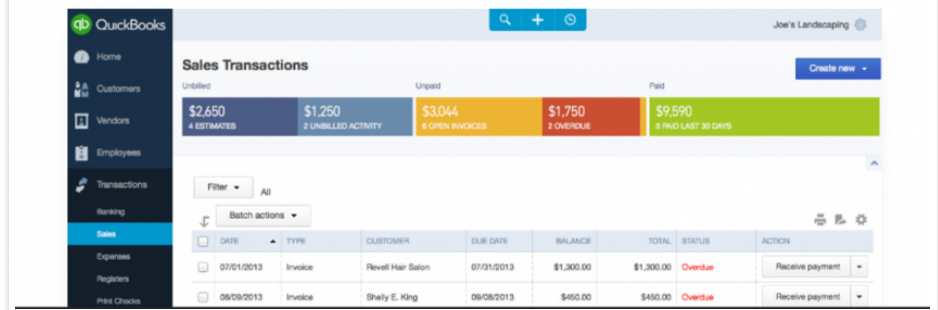


Connect your QuickBooks account

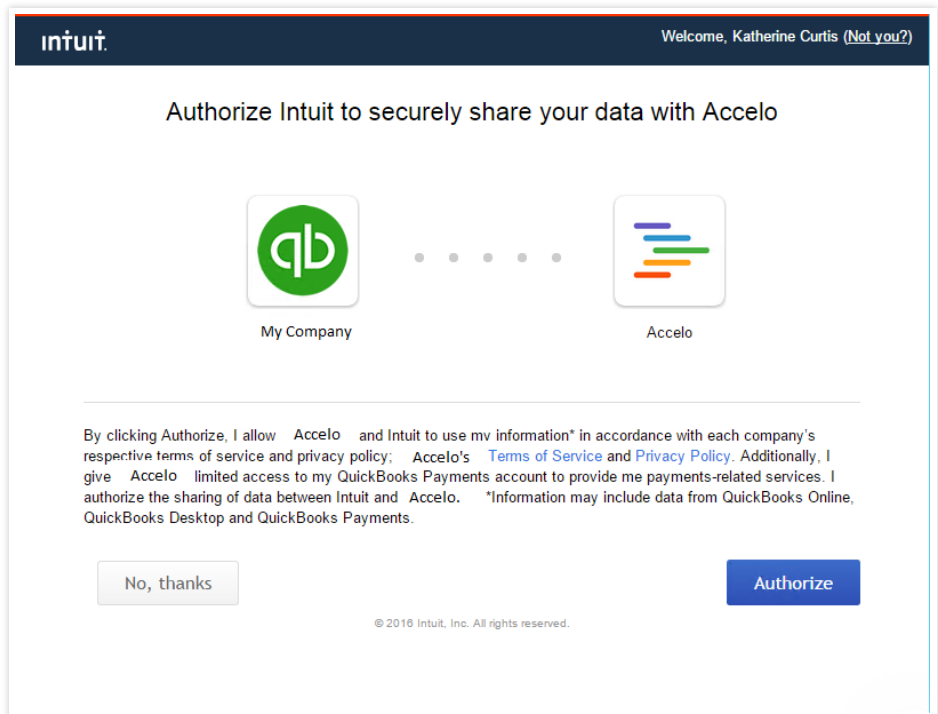
Connect Accelo directly to your QuickBooks Online account to begin syncing your invoices in real-time! To connect your account, press the Connect To QuickBooks button and enter your account information. The QuickBooks Online tool is available for all editions of QuickBooks Online. QuickBooks Desktop users should use the QuickBooks Web Connector.



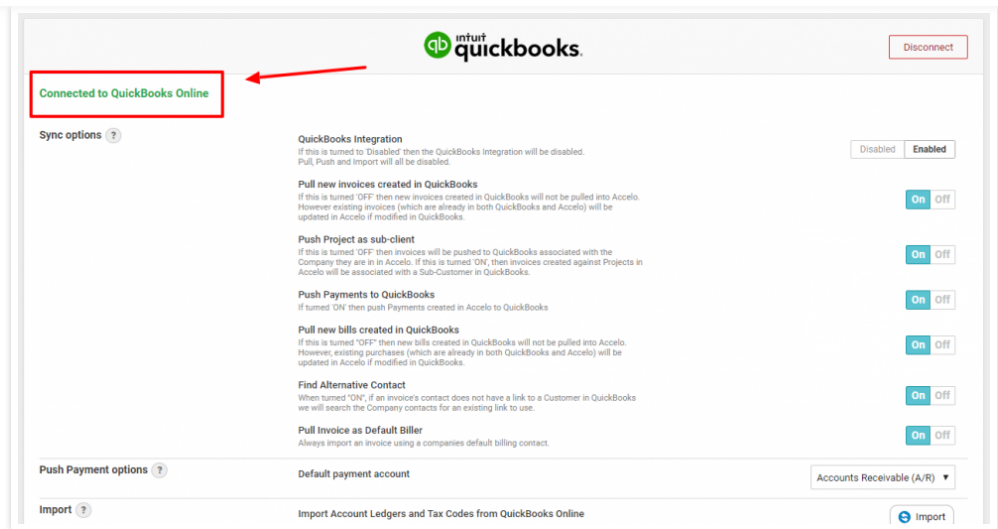
Connect With QuickBooks



3. If you're not already logged in to your QuickBooks account, a window will appear, prompting you to **log in to authorize Accelo to connect** to your QuickBooks.
4. **Authorize** Accelo to connect to your QuickBooks account.



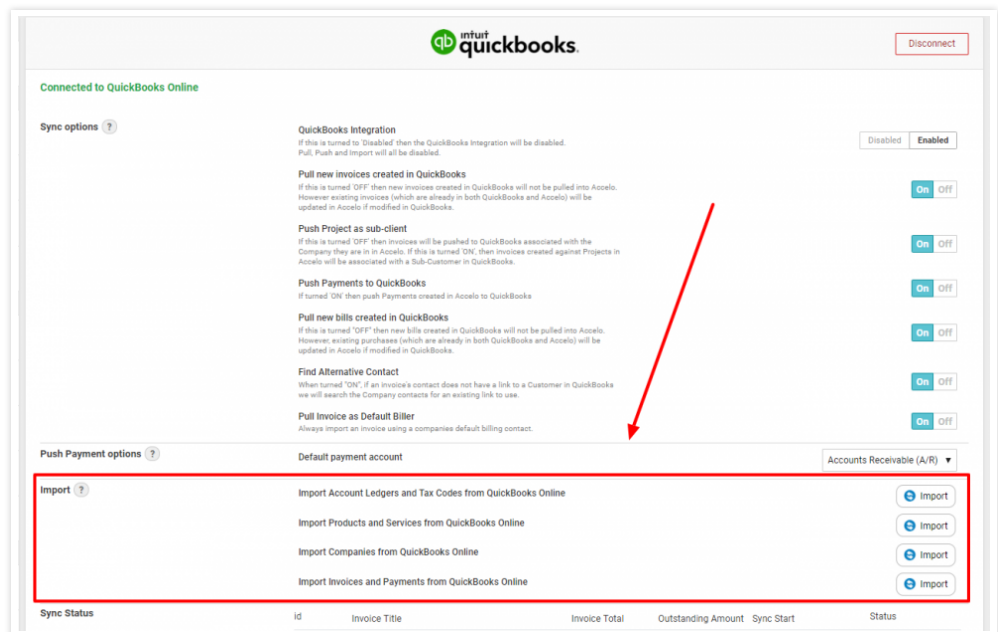
5. Once you've clicked the Authorize button, your QuickBooks account connection will be complete! The integrations page will automatically refresh, and will present you with a new list of tools and options for configuring your QuickBooks integration!



Importing your data from QuickBooks Online

Once you've connected your QuickBooks Online account, you can use your connection to **import your data from QuickBooks**.

You'll find these import tools under the QuickBooks heading of the integrations page:



Once you've connected your Accelo and QuickBooks Online accounts, new invoices will begin automatically syncing between the two systems.

These import tools are used to import historical records from QuickBooks Online into Accelo.

Import Item and Tax Codes From QuickBooks Online:

The first, and most important import tool is used to import your Ledger and Tax Codes from QuickBooks Online. These codes will be then used by you and your team when creating invoices in Accelo, to ensure that they appear in the correct place when synced to QuickBooks.

Accelo will only import and sync with Item Codes whose Type is "Income"

Accelo requires at least one Tax Code be synced with QuickBooks in order to sync invoices. If you charge tax, a tax code set to 0% can be used instead.

Import Products and Services from QuickBooks Online:

correct Ledger and Tax Codes based on the Service or Material Items which you select.

Product and Service Item import includes the Item's:

Title

Description

Code

Sale Price

Purchase Price

Sale Ledger Code

Sale Tax Code

Purchase Ledger Code

Purchase Tax Code

Import Companies:

The company import is used to import customer records from QuickBooks Online.

Company import includes:

The customer's name

The contact's First and Last Name

The customer's physical Address, Email Address and Phone number

Imported customers will be listed as Active companies in Accelo by default, but can be edited after the import has been completed

Sub-Customers will be imported as separate companies in Accelo, appearing as "Parent Customer: Sub Customer"

Import Invoices and Payments for Existing Companies:

Import invoices and their respective payments from QuickBooks for customers which have previously been imported from or created in Accelo.

Invoices & Payments import includes:

The Invoice Title and Description

Individual line item Descriptions, Subtotal, and Tax Amounts

The Tax and Ledger Codes used for each line item

Payment Amounts, Method Accounts, Dates and recording Staff Person

The invoice's customer-facing Notes

The invoice's internal-facing Internal Notes

NOTE: If Material and Service Items (as well as Tax and Ledger Codes) are added in QBO after the initial sync, they will still sync automatically as part of the integration's regular polling process.

Choosing your Sync Preferences

Now that you've connected your Accelo and QuickBooks Online accounts, new invoices will begin to automatically sync between the two systems.



Sync options

QuickBooks Integration

If this is turned 'Disabled' then the QuickBooks integration will be disabled. Pull, Push and Import will all be disabled.

Disabled Enabled

Pull new invoices created in QuickBooks

If this is turned 'OFF' then new invoices created in QuickBooks will not be pulled into Accelo. However existing invoices (which are already in both QuickBooks and Accelo) will be updated in Accelo if modified in QuickBooks.

On Off

Push Project as sub-client

If this is turned 'OFF' then invoices will be pushed to QuickBooks associated with the Company they are in in Accelo. If this is turned 'ON', then invoices created against Projects in Accelo will be associated with a Sub-Customer in QuickBooks.

On Off

Push Payments to QuickBooks

If turned 'ON' then push Payments created in Accelo to QuickBooks

On Off

Pull new bills created in QuickBooks

If this is turned 'OFF' then new bills created in QuickBooks will not be pulled into Accelo. However, existing purchases (which are already in both QuickBooks and Accelo) will be updated in Accelo if modified in QuickBooks.

On Off

Find Alternative Contact

When turned 'ON', if an invoice's contact does not have a link to a Customer in QuickBooks we will search the Company contacts for an existing link to use.

On Off

Pull Invoice as Default Biller

Always import an invoice using a companies default billing contact.

On Off

Accelo offers several options for customizing how that sync occurs:

QuickBooks Integrations:

Allows you to enable and disable the QuickBooks integration's invoice sync. This option must be enabled in order for the integration to function, but can be disabled for testing purposes.

Pull new invoices created in QuickBooks:

Accelo's QuickBooks Online integrations works by automatically syncing invoices created in either Accelo or QuickBooks with the other system. This option allows you disable the sync of new invoices from QuickBooks Online to Accelo, making it a one-way sync.

Push Projects As A Sub-Client:

When an invoice is synced from Accelo to QuickBooks Online, the invoice is listed under the corresponding customer in QuickBooks Online. This option will instead cause the invoice sync to create a new sub-customer under the corresponding customer, and list the project's invoice there. This option is great for projects with lots of invoices, or for keeping your invoices organized.

When a sub-customer is created, its name will be the project's title from Accelo

This option only affects invoices which are created for projects, not issues or retainers

NOTE: Because Accelo does not have a sub-customer structure, all Customers and Sub-Customers (including Projects tracked as Sub-customers) in QuickBooks Online are imported as separate Customers.

Push Payments to QuickBooks:

When enabled, this feature allows you to enter invoice payments in Accelo. Those payments are then pushed to QuickBooks automatically, under the same customer and invoice which you selected in Accelo.

Pull New Bills Created in QuickBooks:

Allows you to automatically import all Bills which are created in QuickBooks.

Find Alternative Contact:

When Accelo syncs an invoice with QuickBooks, Accelo establishes a link between the invoice's billing contact in Accelo and Quickbooks, using that link when syncing future invoices for that contact. This option determines whether Accelo will use that link when syncing invoices for other contacts in the same Company.

Pull Invoice as Default Biller:

Enabling this option will set the billing contact for all imported invoices to the company's default billing contact.

Recording Payments

Payments must be entered in QuickBooks in order to sync with Accelo. Once the payment has been entered in QuickBooks, it will automatically sync to Accelo, under the corresponding customer and invoice.

- The payment amount
- The payment method account
- The date on which the payment was entered
- The user who entered the payment
- The contents of the payment's reference field

Please note - Overpayment is not supported. Credits from overpayments made in QuickBooks will not sync with Accelo.

Understand what information syncs between Accelo and Quickbooks Online

Tax Codes

Accelo Field	QuickBooks Field
Title	Sales Tax Agency
Rate (%)	Sales Tax Rate

Account Ledger Codes

Accelo Field	QuickBooks Field
Title	Name
Code	Code
"Can Invoice?", "Can Purchase?" & "Can Receipt?"	Account Type

Product/Material and Service Items

Accelo Field	QuickBooks Field
Item Name	Name
Item Code	SKU
Description	Sales Description
Item Type	I purchase this product/service from a vendor
Sale Account	Income Account
Purchase Account	Expense Account
Sale Tax Account	Sales Tax Category
Purchase Tax Account	Purchase Tax Category
Sale Price (excl. Tax)	Sale Price/Rate
Purchase Price (excl. Tax)	Cost

Accelo Field	QuickBooks Field
Invoice Number	Invoice #
Customer Descriptions/Notes	Message On Invoice
Raised	Invoice Date
Due	Due Date
Line Item Description	Line Item Description
Line Item Hours/Quantity	Line Item Qty
Line Item Rate/Sale Price	Line Item Rate
Line Item Item Code	Line Item Product/Service
Line Item Tax Code	Line Item Tax

Purchases/Bills

Accelo Field	QuickBooks Field
Purchase Date	Bill Date
Payment Due	Due Date
Purchase Title	Memo
Line Item Description	Line Item Description
Line Item Hours/Quantity	Line Item Qty
Line Item Rate/Sale Price	Line Item Rate
Line Item Item Code	Line Item Product/Service
Line Item Tax Code	Line Item Tax
Line Item Description	Category Description
Line Item Amount	Category Amount
Line Item Ledger Code	Line Item Category
Line Item Tax Code	Line Item Tax

Payments

Accelo Field	QuickBooks Field
Reference	Reference no.
Received On	Payment Date
Default Payment Account	Deposit to
Amount	Amount Received

Accelo Field	QuickBooks Field
Received On	Credit Memo Date
Amount	Total

Customers & Vendors

Accelo Field	QuickBooks Field
Company Name	Company & Display Name As
Contact First Name	First Name
Contact Last Name	Last Name
Contact Email Address	Email
Company Website	Website
Company Phone & Contact Phone	Phone
Company Fax & Contact Fax	Fax
Contact Mobile	Mobile
Company Primary Address Street1 & Street2	Billing Address
Company Primary Address City & Address Title	Billing City/Town
Company Primary Address State	Billing State/Province
Company Primary Address Zipcode	Billing ZIP Code
Company Primary Address Country	Billing Country

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