Integrate Quickbooks Online Version to Industrack

To synchronize with QuickBooks online to Industrack, you need to have Quickbooks online company and Industrack account both logged in. This will allow items like Customer Addressbook, Inventory Parts, and Invoices to synchronize between IndusTrack and QB.

Recommended tasks for QB Online

- Must create a backup for the Quickbooks before the synchronization. Also, it is recommended to create a daily backup for the first few weeks
- If you need to clean up customers, and items, or mark customers and items inactive, do that prior to sync. Otherwise, all items and customers will be synchronized to IndusTrack.
- When QBO tax is set up, QBO tax will automatically apply to inventory items if it was marked taxable in OT.

Customer Synchronization Setup

There are three different options for syncing customers first, select which direction you would want to synchronize.

- QuickBooks to IndusTrack: With this option, QuickBooks will act as the Master. Changes made to customer records in QB will be synchronized into IndusTrack. However, any changes made to the customer records in IndusTrack will not synchronize to QuickBooks. This includes changes made to the customer records by technicians and office users. customers in gbo with taxes assigned will be synced as is in Industrack.
- IndusTrack to QuickBooks: With IndusTrack to Quickbooks selected, IndusTrack will act as the master. Changes
 made to customer records, including the addition of new customers, will be synchronized into QB, but changes
 made in QB will not be synchronized into IndusTrack
- Two-way sync: When two-way sync is selected, changes made to a customer record in either system will be synchronized into the other system. In the event the same record is changed in both systems, the most recent edit will be the one used.

How IndusTrack synchronizes the customers with multiple locations or service location

- 1. Customers with multiple service locations in Industrack will sync to QBO as sub-customers.
- Sub customers in QBO will be synced as service locations in the Location Tab on Industrack customer addressbook.
- 3. Any attachments and notes need to be imported separately using excel files
- 4. Active customers in QB will be synchronized into the active customers list in IndusTrack and inactive customers in QB will be synchronized into the inactive list in IndusTrack. The same is true for IndusTrack to QB sync
- 5. When changes are made to a record, it will not be reflected in the other system until after the next automated sync or a manual sync is performed.

INVENTORY SYNC

There are two different options for inventory, services, or items. Two-way sync is not available for this option. We will synchronize both active and non-active items to their own respective lists.

- 1. QB to IndusTrack: This will synchronize inventory, non-inventory, service, and equipment from QuickBooks to IndusTrack. Any changes made to items in IndusTrack will not be updated in QB. Chart of accounts assigned in QBO inventory items will also automatically apply once the inventory is synced to Industrack
- 2. IndusTrack to QB: This will synchronize the items from IndusTrack to QB only.
 - If you change an item to non-taxable in IndusTrack, once it is synchronized to QB, QB will apply the tax to it. You will need to mark the item as non-taxable in QB or tax will apply automatically.
 - Equipment items in IndusTrack will synchronize as Inventory items in QuickBooks
 - Synchronizing inventory from IndusTrack to QB You will need to assign income and expense accounts to inventory from Industrack so that it will be synced to Quickbooks.
 - We do not sync purchase orders with QB. 1. if you add a new part in Industrack and it syncs to the QB, the correct account needs to be set up in the QB. If the parts are already in Industrack and it was added in QB, it will automatically assign them to the correct accounts associated with it. If you generate P.O in QB and receive inventory in QB and add an invoice in QB for that part, If the part cost is different that will manually need to be updated in IndusTrack. If you are doing sync from Industrack to QB If you generate a p.o in Industrack and receive inventory in Industrack you do not need to update the cost in Industrack. You can enter the invoice from the vendor in QB and also attach it to the job. Industrack does not have an expenses or vendor invoice option.

INVOICE SYNC

- 1. Invoices can only be synchronized from IndusTrack to QB. To import historical invoices for a customer into IndusTrack, you must use an excel file.
- Invoices do not automatically synchronize like customers and inventory. Invoices must be approved and marked "ready for sync" before they synchronize to QB. All invoices marked as "ready for sync" will synchronize the next time a sync occurs.
- 3. Once an invoice has been synchronized from IndusTrack into QB, the invoice number in IndusTrack will change and will match the invoice number in QuickBooks.
- 4. If there is a tax set up for a customer in QB, QB will automatically apply the tax to the invoice once synchronized. Tax rates can be applied to customers in IndusTrack to make the invoices match automatically.
- 5. After you synchronize the invoice from IndusTrack to QB, once you receive payments in QB and mark the invoice paid, the invoice in IndusTrack will also get marked as paid after sync.

Integrate QBO to Industrack

- 1. Log in to OneTrack Software https://onetrack.IndusTrack.com/login.
- 2. On a different tab, log in to Quickbooks online as well.
- 3. Once logged in to Industrack software go to Settings> Integrations> Quickbooks



4. On the Quickbooks integration page, click on Configure sync.

IndusTrack MAP	CUSTOM	ER ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		1	
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5. On the Configure Sync page, select Quickbooks online as Quickbooks Integration Type.

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Configur	e Sync							х
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	Inventory	Sync Ways	One Way	•	Sync Direction	QuickBooks to Industrack	•	- 1
		CHANGE DE	FAULT ACCOUNTS					
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							CANCEL	SAVE

6. Clcik on connect to Quickbooks.

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					CANCEL	SAVE

7. You will be redirected to another page and will be asked to log in to your Quickbooks account if not logged in. If you are already logged in it will ask you to select a Company.

^m	Welcome Raz, (<u>Not You?</u>)
Please select your company	
Search for a company	
No, thanks	Next
	untuut

8. Once you have selected a company, click on **Next** to successfully integrate Quickbooks to Industrack.

Ф диіскроокз.	Welcome Raz, (<u>Not You?</u>
Please select your company	
Search for a company Jorji	~
No, thanks	Next

9. Click on **Connect**, and you will be redirected back to Industrack and it will be successfully integrated.



10. Once redirected to Industrack, you will see that a connection between Industrack and Quickbooks has been established. You can also stop the connection by clicking on the Stop Connection button in the upper right corner.

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11. After we have established a connection, select a **Sync Frequency**. You can also turn this off and you can manually sync every time you want to sync something.

cor	nfigure QuickBooks Integrati	on please	follow steps	s beneat	л		STOP CON	NECTION
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If you select not to automate the sync you can do the sync manually here every time you want to sync

Settings> Integration > Quickbooks> Sync Now.

IndusTrack MAP	CUSTOME	R ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS			2 0 0 0 0
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12. Select which items you would like to sync, Customers, Inventory, and Invoices.

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Connection to QuickBook	s online account	t Jorji has been establish	ed			
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Automated	Sync Freque	ncy 1 hour	×			
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Automated Items to Sync Customers Inventory	Sync Freque Sync Ways Sync Ways	Two Ways One Way	Sync Direction	QuickBooks to Industrack	×	

13. For Customers, we can select one-way or two-way sync.

201	nfigure QuickBooks Integration	please follow steps benea	ath		STOP CONNECTION
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If you select one way, you can either choose whether Quickbooks will act as the master or Industrack.

Configure	e Sync							Х
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	Inventory	Sync Ways	One Way	-	Sync Direction	Industrack to QuickBooks		
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							CANCEL	SAVE

If you select two-way sync, any customer information you enter into either Quickbooks or Industrack will be synced in both systems.

configure QuickBooks Integ	gration pleas	e follow steps	beneath			STOP	CONNECTION
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Inventory Sync can only be synced one way with either sync direction:

Quickbooks to Industrack- With this sync direction only inventory items entered from Quickbooks will be synced to Industrack, any existing inventory items or entered items from Industrack won't sync to Quickbooks.

Industrack to Quickbooks- With this direction, only inventory items entered from Industrack will be synced to Quickbooks, any existing inventory items or entered items from Quickbooks won't sync to Industrack.

Configure Sync					Х
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CHANGE	DEFAULT ACCOUNTS	/	Industrack to QuickBooks		
Invoices Sync Way	One Way	Sync Direction	Industrack to QuickBooks	¥	ļ
				CANCEL	SAVE

14. Assign Chart of Accounts, you can assign it here to globally assign accounts for all Inventory items or you can assign each account to each item on the Inventory settings. After assigning accounts click Save.

Item Type	Default Income Account	Default Expense Account	Default Asset Account
Non-Inventory	Account Search	Account Search	
Inventory	Account Search	Account Search 🗙	Account Search
Equipment Item	Account Search	Account Search 🗙	Account Search 🗙
Service	Account Search	Account Search	

15. Enable Invoice Sync, we only sync invoices from Industrack to Quickbooks.

How to Sync Invoice from Industrack to Quickbooks.

1. On Industrack select invoice or invoices you want to sync to Quickbooks. You can either select only one or multiple invoices.

Indu	isTrack M	AP CU	STOMER	ESTIMA	TES SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS				Q D	0	2
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	08/15/2022			P	&L Chinese Restaura	nt 5800 Cahi	l Ave, Inver Grove	e Heights, MN, 55	076		\$0.00	\$324.00	Paid		:	
	08/12/2022			2	wheels club	arizona, 24	48 N Leandro Cir,	Mesa, AZ, 5207			\$90.15	\$90.15	Unpaid	E.		

2. After you select the invoice or invoices you would like to sync, click MORE ACTIONS> Mark for sync.

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3. Select YES.



4. After selecting YES, you will see that the status of the invoices that we marked for sync are marked as Ready for Sync.

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5. If you selected the Automated sync option, we need to wait until the next sync cycle for the invoices to get synced to Quickbooks. You can also do manual sync if you want the invoice to sync in real-time.

Once the sync cycle is done and the invoices we marked for synced are already synced to Quickbooks, the status of the invoices in Industrack will go back to Unpaid.

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6. If you check on Quickbooks, you will see the invoices that we synced from Industrack in there.

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ស៊	GET PAID		
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Ê		\$6,155.58 Overdue	\$2,200.60 \$0.00 \$0.00 Not due vet Not deposited Deposited
æ	Invoices		
	Payment links		
88	Deposits	Status Date	
8		Batch actions V All V Inis month	Create invoice V
		DATE NO. CUSTOMER	AMOUNT STATUS A ACTION (S)
88	PAY		
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1000		8/15/2022 1045Basement Bar=-	\$1,010.15 Due in 29 days 🖉 Receive payment 💌
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		8/12/2022 1047 2 wheels club	590.15 Due in 26 days 🖉 Receive payment 💌
			First Previous 1-4 of 4 Next Last

7. On Quickbooks, If you mark the invoices as paid once the next sync cycle in Industrack is done the invoices will also get marked as **Paid**.