

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.

1. 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 qbo with taxes assigned will be synced as is in Industrack .
2. 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
3. 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.
2. 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.

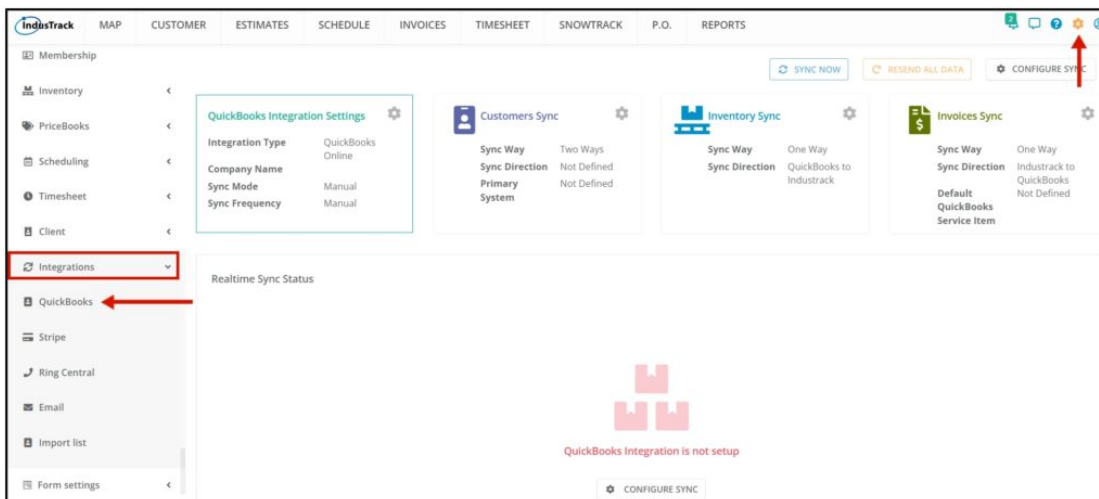
INVOICE SYNC

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.
2. 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.

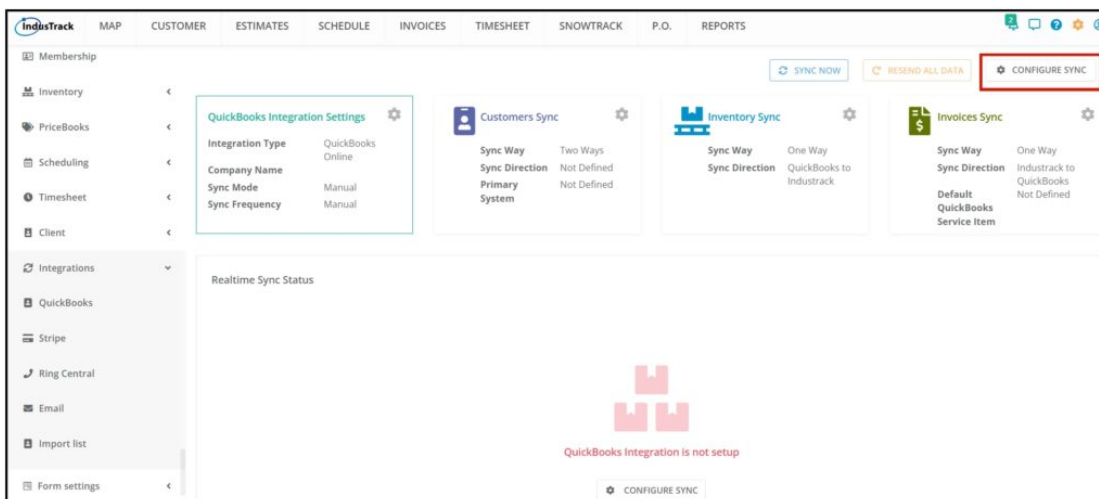
Integrate QBO to Industrack

1. Log in to OneTrack Software <https://onetrack.IndusTrack.com/login>.
2. On a different tab, log in to Quickbooks online as well.

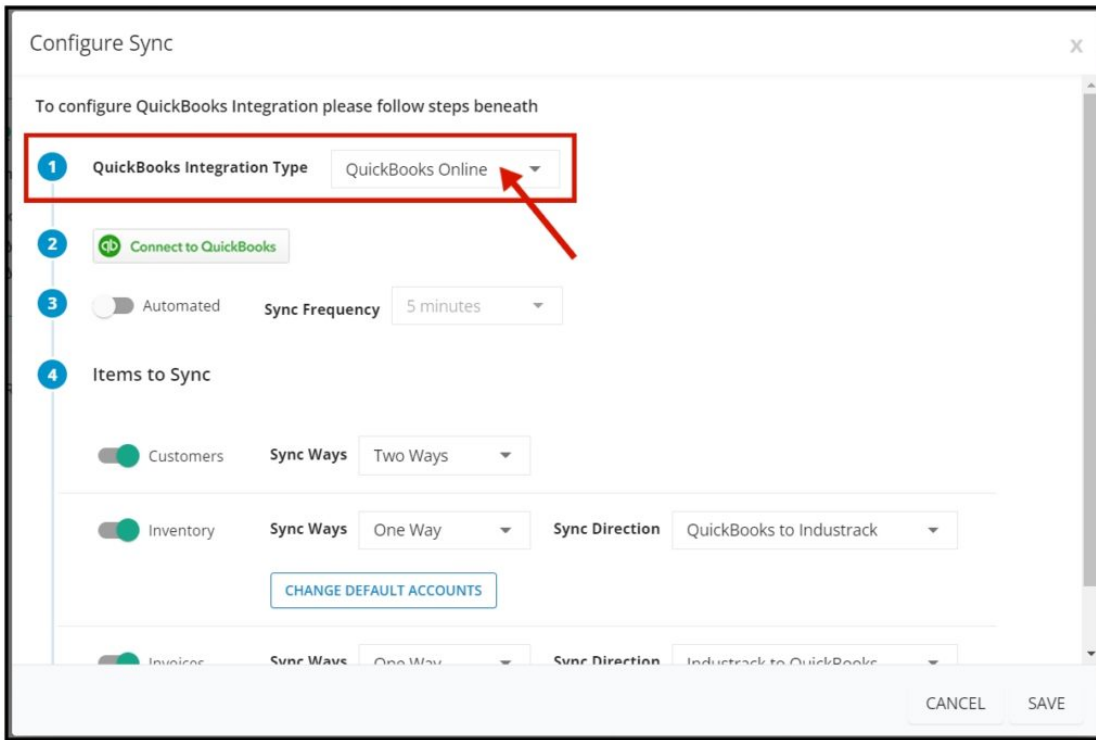
3. Once logged in to Industrack software go to Settings> Integrations> Quickbooks



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




5. On the Configure Sync page, select **Quickbooks online** as Quickbooks Integration Type.



Configure Sync

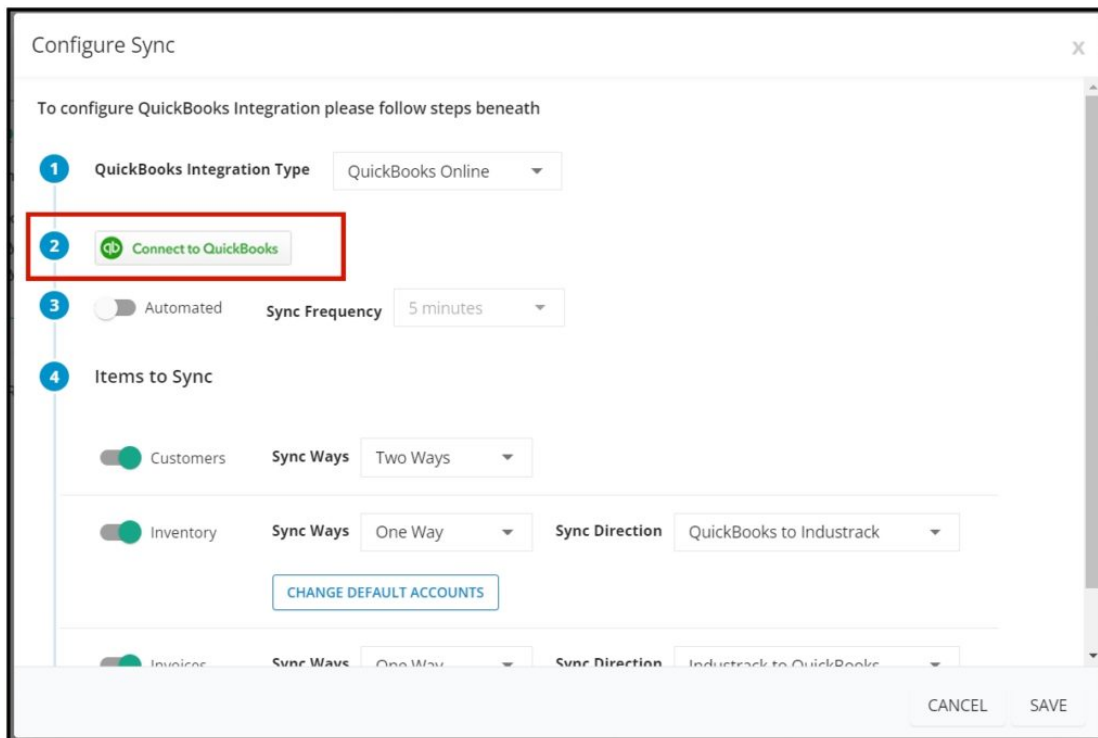
To configure QuickBooks Integration please follow steps beneath

- 1 QuickBooks Integration Type** QuickBooks Online
- 2**  Connect to QuickBooks
- 3** ☐ Automated Sync Frequency 5 minutes
- 4 Items to Sync**
 - ☒ Customers Sync Ways Two Ways
 - ☒ Inventory Sync Ways One Way Sync Direction QuickBooks to Industrack
 - ☐ Invoices Sync Ways One Way Sync Direction Industrack to QuickBooks

CHANGE DEFAULT ACCOUNTS


CANCEL SAVE

6. Click on connect to **Quickbooks**.



Configure Sync

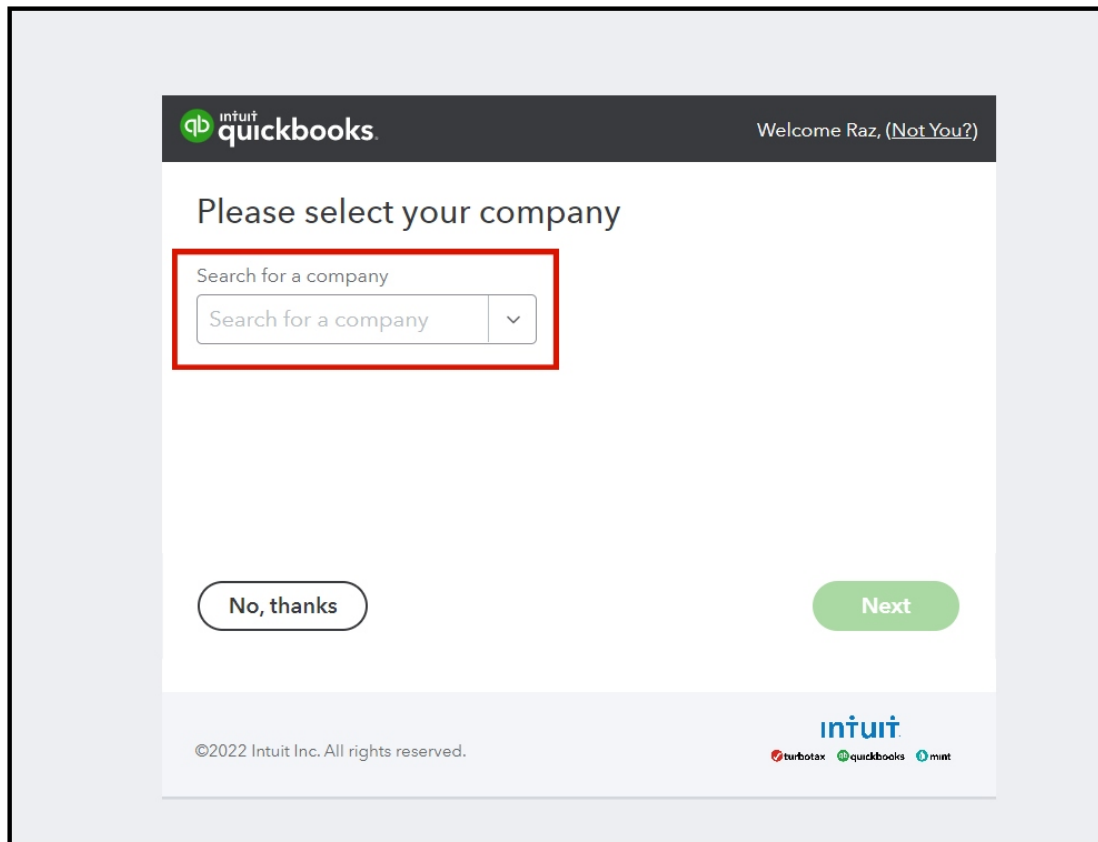
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- 3** ☐ Automated Sync Frequency 5 minutes
- 4 Items to Sync**
 - ☒ Customers Sync Ways Two Ways
 - ☒ Inventory Sync Ways One Way Sync Direction QuickBooks to Industrack
 - ☐ Invoices Sync Ways One Way Sync Direction Industrack to QuickBooks

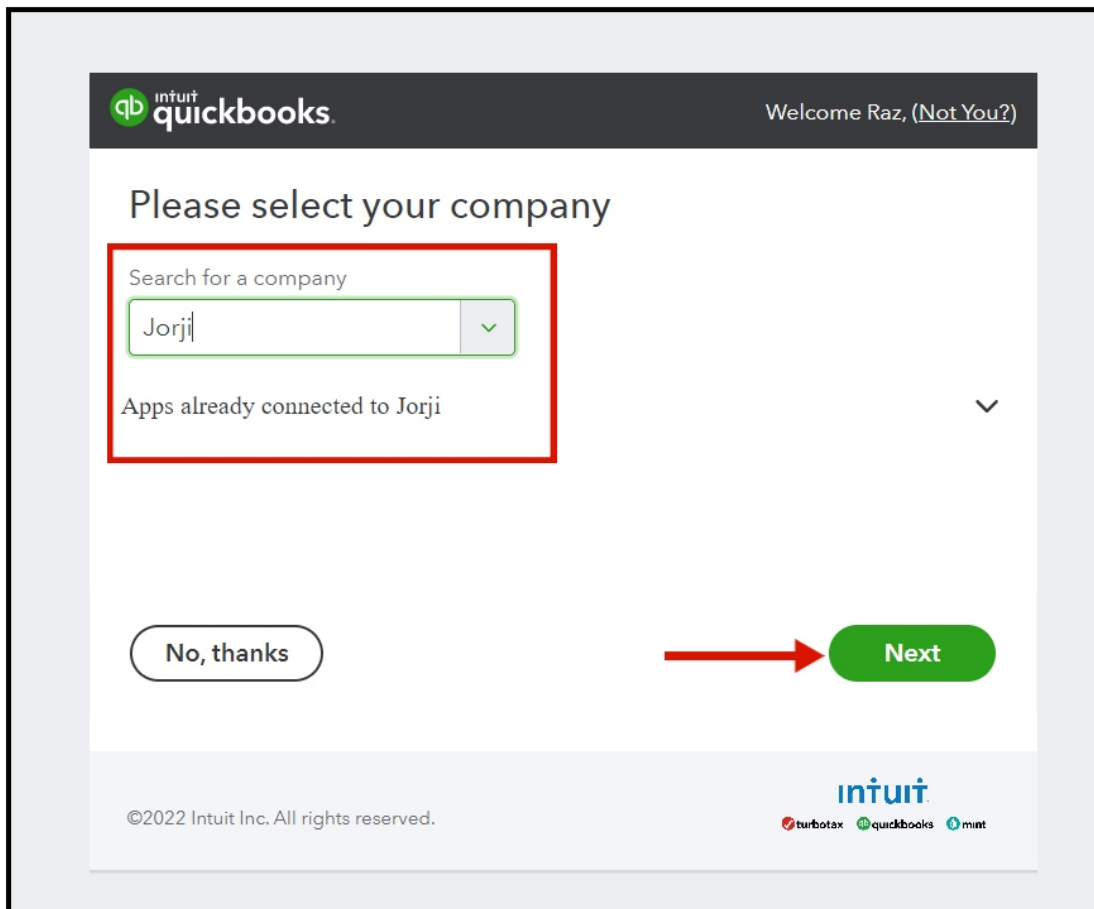
CHANGE DEFAULT ACCOUNTS

CANCEL SAVE

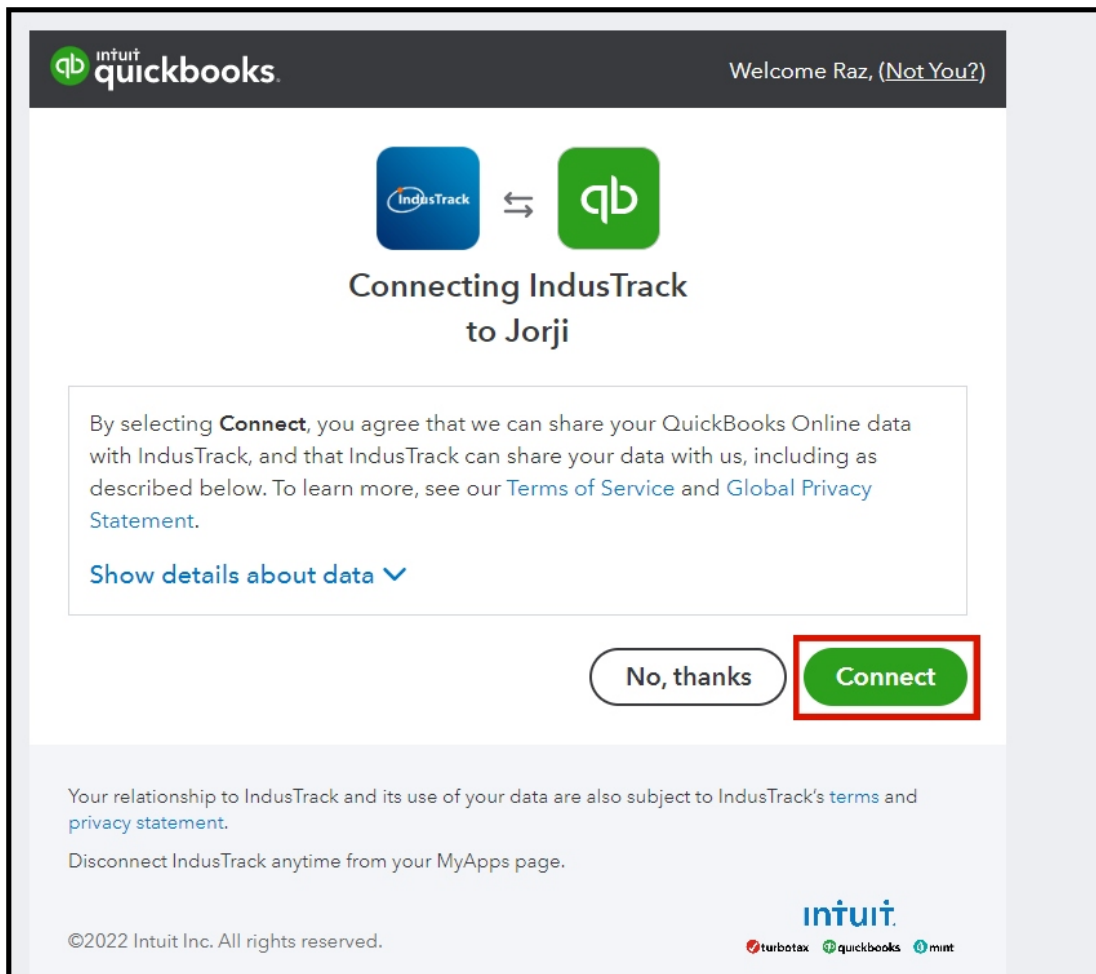
7. You will be redirected to another page and will be asked to log in to your Quickbooks account if not logged in. If you are already logged in it will ask you to select a Company.



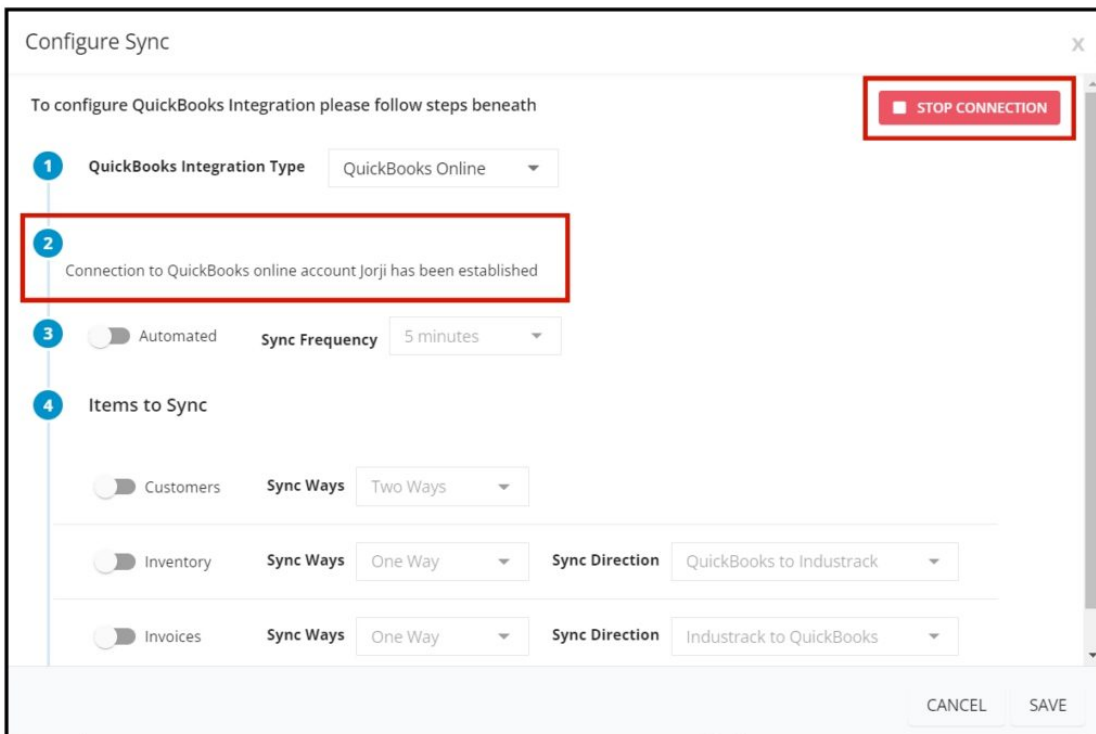
8. Once you have selected a company, click on **Next** to successfully integrate Quickbooks to Industrack.



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.



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.

Configure Sync

To configure QuickBooks Integration please follow steps beneath

1 QuickBooks Integration Type QuickBooks Online

2 Connection to QuickBooks online account Jorji has been established

3 ☒ Automated **Sync Frequency** 5 minutes

4 Items to Sync

☐ Customers **Sync Ways** Two Ways

☐ Inventory **Sync Ways** One Way **Sync Direction** QuickBooks to Industrack

☐ Invoices **Sync Ways** One Way **Sync Direction** Industrack to QuickBooks

CANCEL SAVE

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 CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. REPORTS

FFIRBOOKS

Scheduling

Timesheet

Client

Integrations

QuickBooks

Stripe

Ring Central

Email

Import list

QuickBooks Integration Settings

Integration Type QuickBooks Online

Company Name Jorji

Sync Mode Manual

Sync Frequency Manual

Customers Sync

Sync Way Two Ways

Sync Direction Not Defined

Primary System

Inventory Sync

Sync Way One Way

Sync Direction Industrack to QuickBooks

Invoices Sync

Sync Way One Way

Sync Direction Industrack to QuickBooks

Default QuickBooks Service Item

Realtime Sync Status

Last Sync Status: Sync initiated

Ignoring sync customer data.

Ignoring sync invoice data.

End QB online scanning.

Sync completed

DOWNLOAD ERRORS

SYNC NOW RESEND ALL DATA CONFIGURE SYNC

12. Select which items you would like to sync, Customers, Inventory, and Invoices.

Configure Sync

1 QuickBooks Integration Type QuickBooks Online

2 Connection to QuickBooks online account Jorji has been established

3 ☒ Automated Sync Frequency 1 hour

4 **Items to Sync**

Item	Sync Ways	Sync Direction
<input checked="" type="checkbox"/> Customers	Two Ways	
<input type="checkbox"/> Inventory	One Way	QuickBooks to Industrack
<input type="checkbox"/> Invoices	One Way	Industrack to QuickBooks

CANCEL SAVE

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

Configure Sync

To configure QuickBooks Integration please follow steps beneath

1 QuickBooks Integration Type QuickBooks Online

2 Connection to QuickBooks online account Jorji has been established

3 ☒ Automated Sync Frequency 1 hour

4 **Items to Sync**

Item	Sync Ways	Sync Direction
<input checked="" type="checkbox"/> Customers	One Way	QuickBooks to Industrack
<input type="checkbox"/> Inventory	One Way	QuickBooks to Industrack
<input type="checkbox"/> Invoices	One Way	Industrack to QuickBooks

CANCEL SAVE

If you select one way, you can either choose whether Quickbooks will act as the master or Industrack.

Configure Sync

To configure QuickBooks Integration please follow steps beneath

1 QuickBooks Integration Type: QuickBooks Online

2 Connection to QuickBooks online account Jorji has been established

3 ☒ Automated Sync Frequency: 1 hour

4 Items to Sync

Item	Sync Ways	Sync Direction
<input checked="" type="checkbox"/> Customers	One Way	QuickBooks to Industrack
<input type="checkbox"/> Inventory	One Way	QuickBooks to Industrack
<input type="checkbox"/> Invoices	One Way	Industrack to QuickBooks

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 Sync

To configure QuickBooks Integration please follow steps beneath

1 QuickBooks Integration Type: QuickBooks Online

2 Connection to QuickBooks online account Jorji has been established

3 ☒ Automated Sync Frequency: 1 hour

4 Items to Sync

Item	Sync Ways	Sync Direction
<input checked="" type="checkbox"/> Customers	Two Ways	
<input type="checkbox"/> Inventory	One Way	QuickBooks to Industrack
<input type="checkbox"/> Invoices	One Way	Industrack to QuickBooks

CANCEL SAVE

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

2 Connection to QuickBooks online account Jorji has been established

3 ☐ Automated **Sync Frequency** 5 minutes

4 **Items to Sync**

☒ Customers **Sync Ways** Two Ways

☒ **Inventory** **Sync Ways** One Way **Sync Direction** QuickBooks to Industrack

[CHANGE DEFAULT ACCOUNTS](#)

☐ Invoices **Sync Ways** One Way **Sync Direction** Industrack to QuickBooks

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.

Select Default Accounts

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

CLOSE SAVE

CANCEL SAVE

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

How to Sync Invoice from Industrack to Quickbooks.

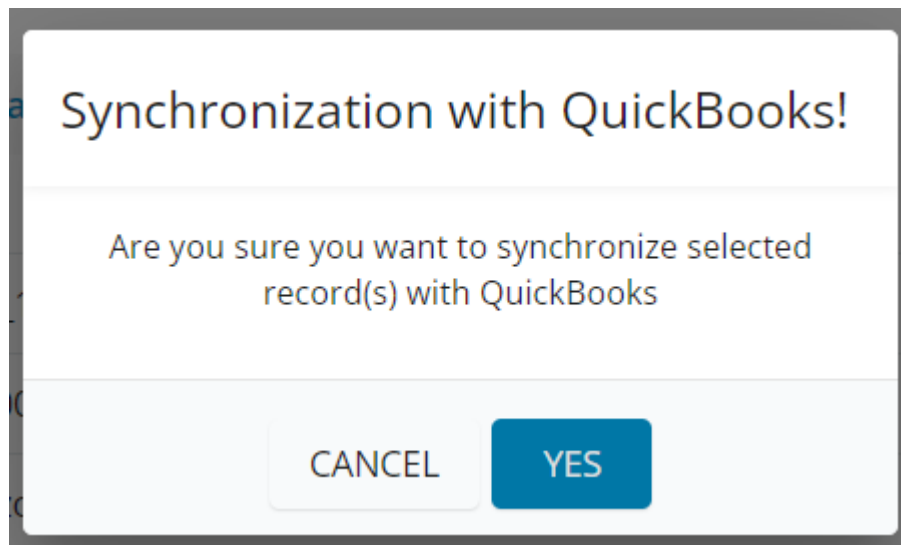
1. On Industrack select invoice or invoices you want to sync to Quickbooks. You can either select only one or multiple invoices.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
08/15/2022				--Basement Bar--	511 N Washington Ave, Minneapolis, MN, 55401		\$235.66	\$235.66	Unpaid
08/15/2022	7			--Basement Bar--	BB_1, 511 N Washington Ave, Minneapolis, MN, 55401		\$1,102.07	\$1,102.07	Unpaid
08/15/2022				A&L Chinese Restaurant	5800 Cahill Ave, Inver Grove Heights, MN, 55076		\$0.00	\$324.00	Paid
08/12/2022				2 wheels club	arizona, 248 N Leandro Cir, Mesa, AZ, 5207		\$90.15	\$90.15	Unpaid

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

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
08/15/2022				--Basement Bar--	511 N Washington Ave, Minneapolis, MN, 55401		\$235.66	\$235.66	Unpaid
08/15/2022	7			--Basement Bar--	BB_1, 511 N Washington Ave, Minneapolis, MN, 55401		\$1,102.07	\$1,102.07	Unpaid
08/15/2022				A&L Chinese Restaurant	5800 Cahill Ave, Inver Grove Heights, MN, 55076		\$0.00	\$324.00	Paid
08/12/2022				2 wheels club	arizona, 248 N Leandro Cir, Mesa, AZ, 5207		\$90.15	\$90.15	Unpaid

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.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
08/15/2022				--Basement Bar--	511 N Washington Ave, Minneapolis, MN, 55401		\$235.66	\$235.66	Ready for Sync
08/15/2022	7			--Basement Bar--	BB_1, 511 N Washington Ave, Minneapolis, MN, 55401		\$1,102.07	\$1,102.07	Ready for Sync
08/15/2022				A&L Chinese Restaurant	5800 Cahill Ave, Inver Grove Heights, MN, 55076		\$0.00	\$324.00	Paid
08/12/2022				2 wheels club	arizona, 248 N Leandro Cir, Mesa, AZ, 5207		\$90.15	\$90.15	Ready for Sync

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.

IndusTrack

MAPCUSTOMERESTIMATESINVOICESTIMESHEETSNOWTRACKP.O. REPORTS

✓

Paid

\$ 2033.39

!

Overdue

\$ 0.00

Open invoices

\$ 4007.13

Search

Date (from/to):

Choose a date From

Choose a date To

AllUnpaidOverduePaid

CLEAR FILTER

+ ADD NEW

MORE ACTIONS

<input type="checkbox"/>	Date ↓	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
<input type="checkbox"/>	08/15/2022				--Basement Bar--	511 N Washington Ave, Minneapolis, MN, 55401		\$235.66	\$235.66	Unpaid
<input type="checkbox"/>	08/15/2022	1044	7	7	--Basement Bar--	BB_1, 511 N Washington Ave, Minneapolis, MN, 55401		\$1,102.07	\$1,102.07	Unpaid
<input type="checkbox"/>	08/15/2022				A&L Chinese Restaurant	5800 Cahill Ave, Inver Grove Heights, MN, 55076		\$0.00	\$324.00	Paid
<input type="checkbox"/>	08/12/2022	1046			2 wheels club	arizona, 248 N Leandro Cir, Mesa, AZ, 5207		\$90.15	\$90.15	Unpaid

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

qb

Get paid & pay

Overview

GET PAID

Customers

Estimates

Invoices

Payment links

Deposits

Products & services

PAY

Vendors

Jorji

My ExpertsHelp

All invoices

Get paid upfront

\$8,356.18 Unpaid

\$6,155.58 Overdue

\$2,200.60 Not due yet

\$0.00 Paid

\$0.00 Not deposited

\$0.00 Deposited

Batch actions

Status

Date

Create invoice

<input type="checkbox"/>	DATE	NO.	CUSTOMER	AMOUNT	STATUS	ACTION
<input type="checkbox"/>	8/15/2022	1044	--Basement Bar--	\$1,010.15	Due in 29 days	Receive payment
<input type="checkbox"/>	8/15/2022	1045	--Basement Bar--	\$1,010.15	Due in 29 days	Receive payment
<input type="checkbox"/>	8/12/2022	1046	2 wheels club	\$90.15	Due in 26 days	Receive payment
<input type="checkbox"/>	8/12/2022	1047	2 wheels club	\$90.15	Due in 26 days	Receive payment

FirstPrevious1-4 of 4NextLast

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**.