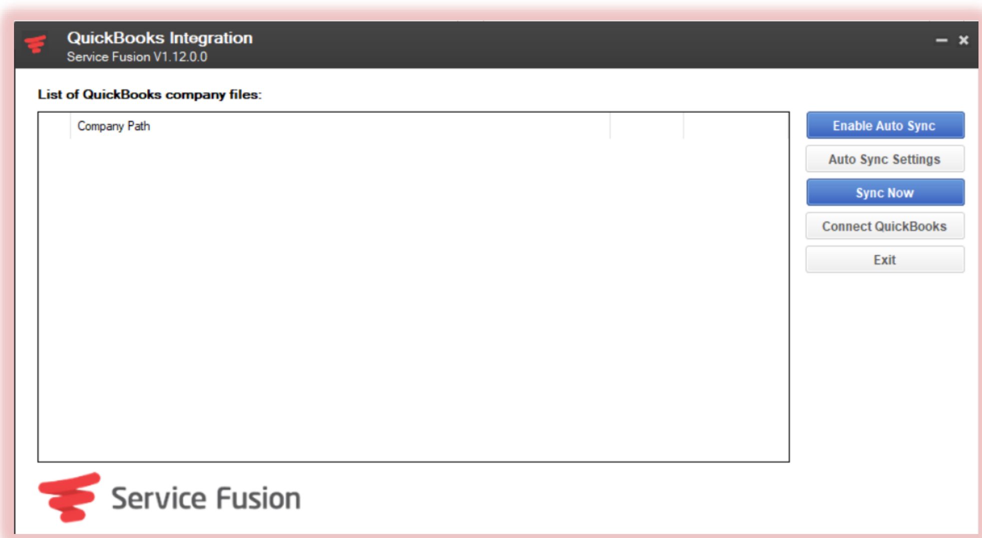
Service Fusion QuickBooks Desktop Integration Guide

This guide will serve as a walkthrough for installing and setting up the Service Fusion QuickBooks Integration tool. This tool is only required for users running QuickBooks Desktop. Before beginning this integration, we recommend that you make a backup of your QuickBooks database.

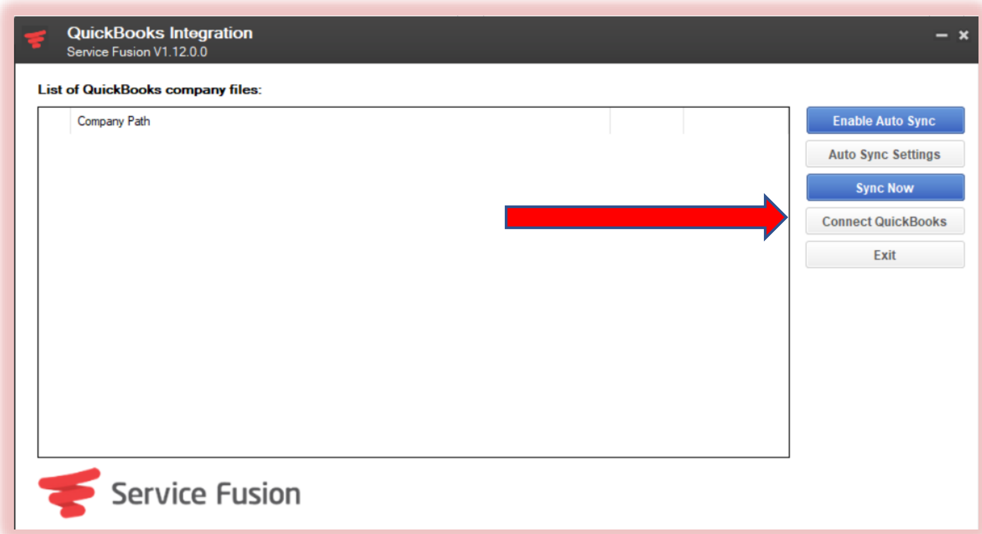
Step 1: Log into QuickBooks using your Admin profile. Leave QuickBooks open and running throughout the next steps.

Step 2: Download, install, and launch the Service Fusion QuickBooks Integrator. (You can click here to download the installation file)

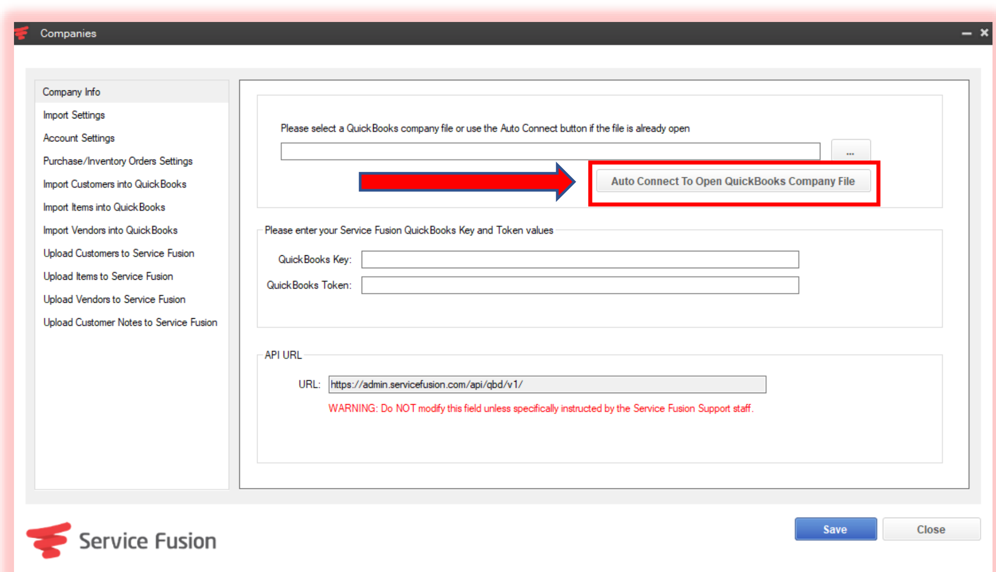
Confirm the integrator is open. The open integrator will look like this:



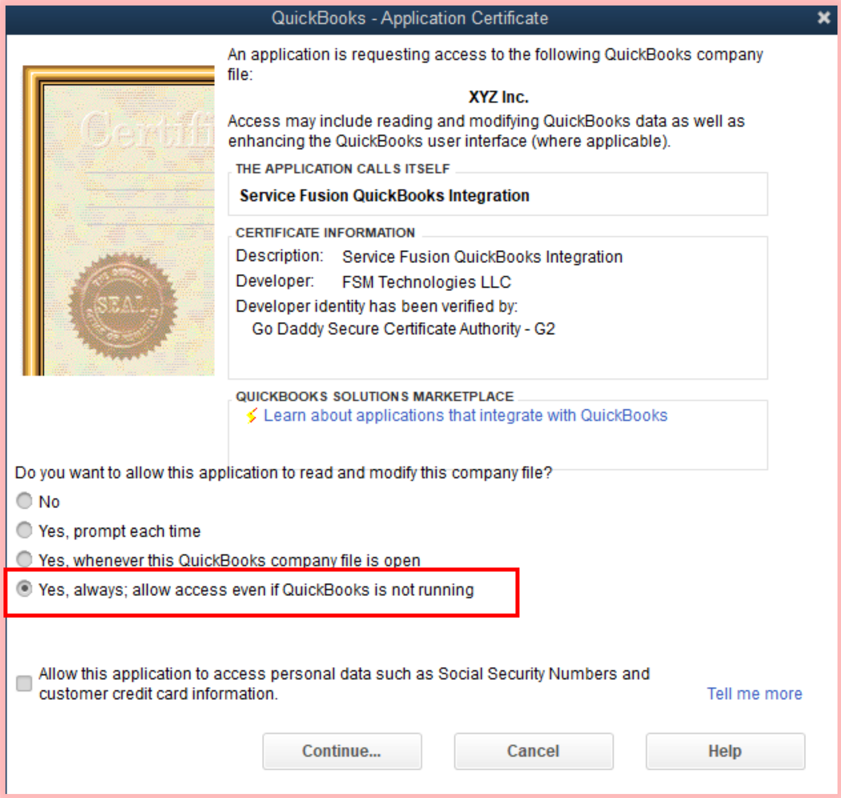
Step 3: Connecting QuickBooks: Within the integrator, select the '**Connect QuickBooks**' button:



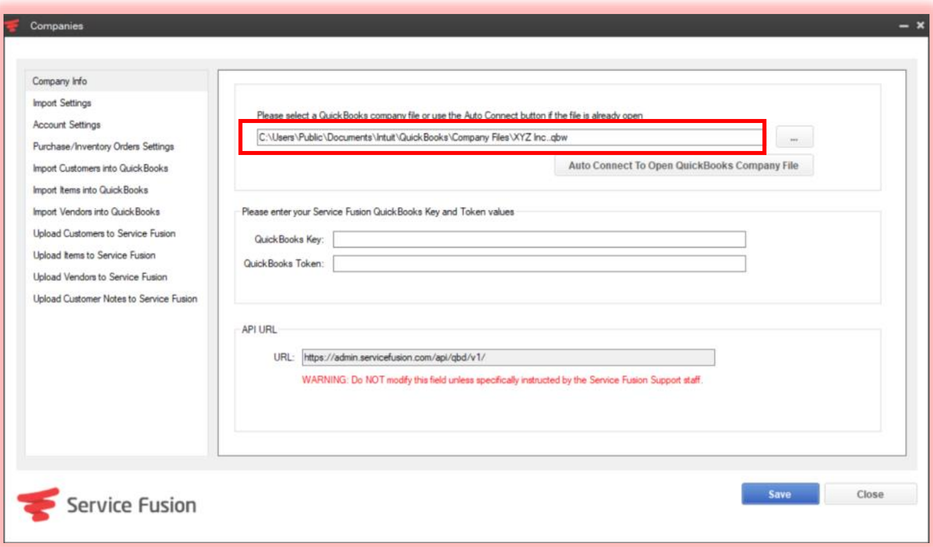
The next screen will appear. Click the '**Auto Connect to Open QuickBooks File**' button:



You should now see an alert in your active QuickBooks application. Select the '**Yes; always; allow access even if QuickBooks is not running**' radio button. If you have multiple user profiles in your QuickBooks, make sure you select the 'Admin' user..



Continue to the next page and accept and close any additional alerts. Afterwards, you should now see your QuickBooks database path listed in the integrator:

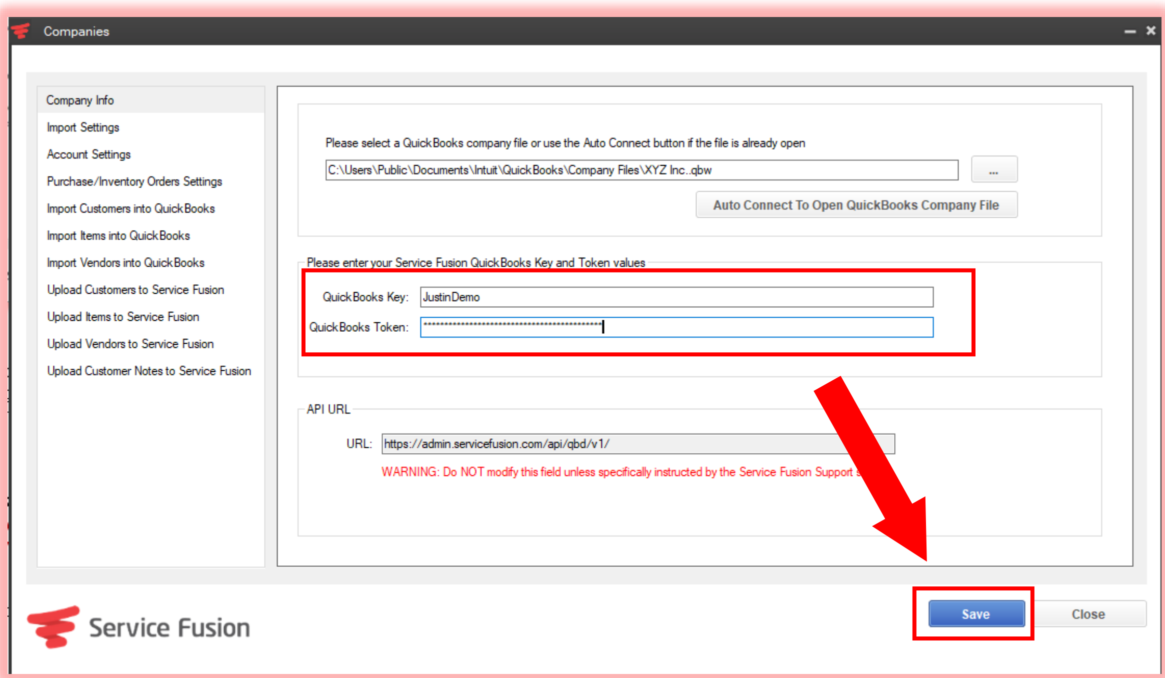


Now you will need to enter the '**QuickBooks Key**' and the '**QuickBooks Token**'. This information is found inside of your Service Fusion account. Log into your Service Fusion account and navigate to '**QuickBooks Desktop**', located under the '**My Office**' menu option (Here is a direct link to this section: click here).

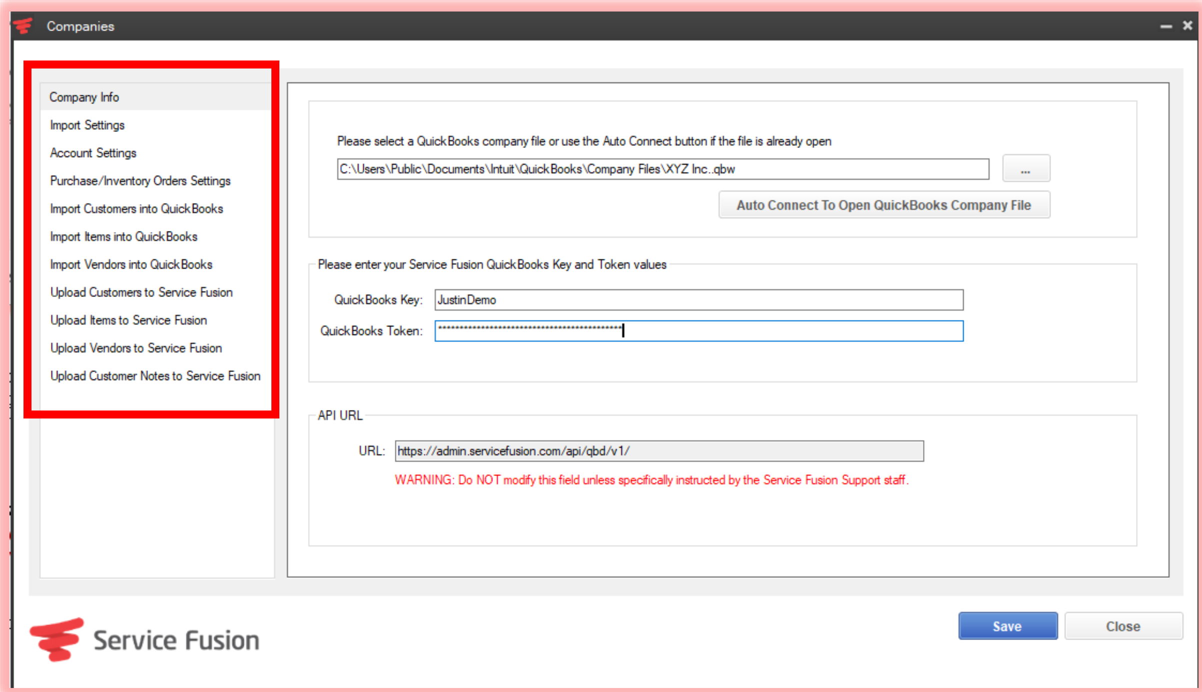
In addition to retrieving the QuickBooks Key and Token information from this screen, there are some additional settings you can you may want to review and enable (e.g., Enabling Class Tracking, Job syncing, Estimate Syncing, and PO/Inventory Order Syncing). If you don't want to enable these syncing functions you can skip them.

Note: The 'QuickBooks Desktop ID' listed in your Service Fusion account will go into the 'QuickBooks Key' field within the integrator. The 'QuickBooks Desktop Token' details listed in your Service Fusion account will go into the 'QuickBooks Token' field within the integrator. It is recommended that you copy and paste these details to ensure accuracy.

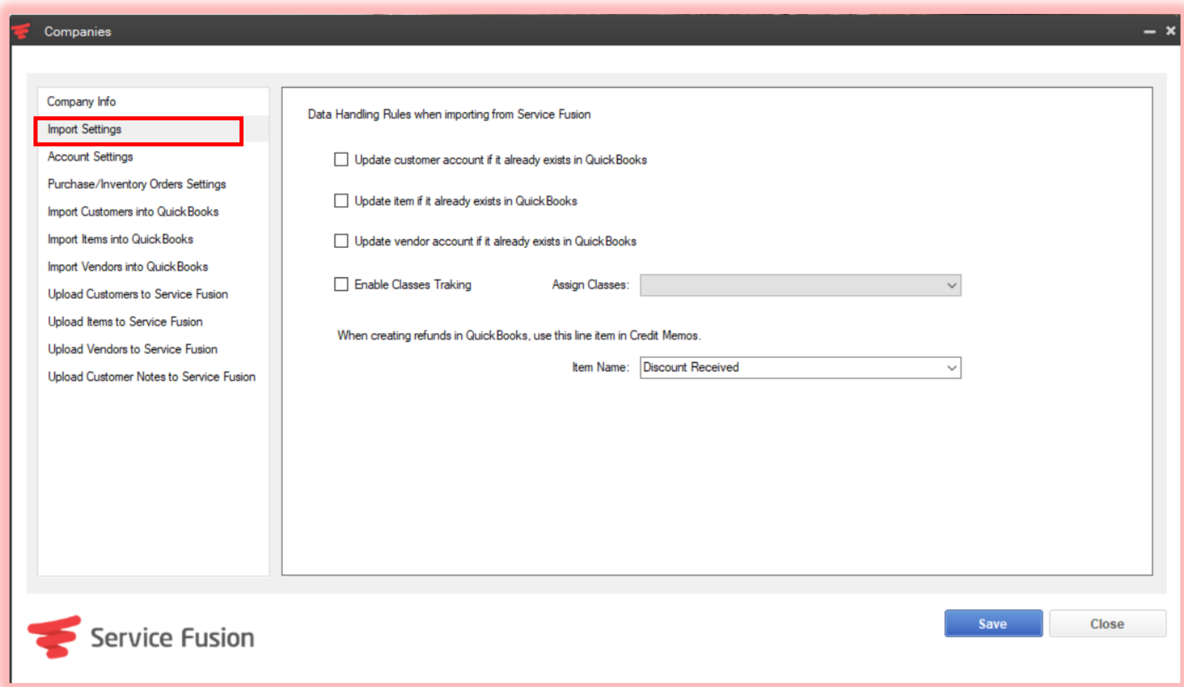
Once you have copied the Key and Token into the integrator, click the '**Save**' button:



After successfully saving the details, take note of the menu details on the left-hand side of the integrator:

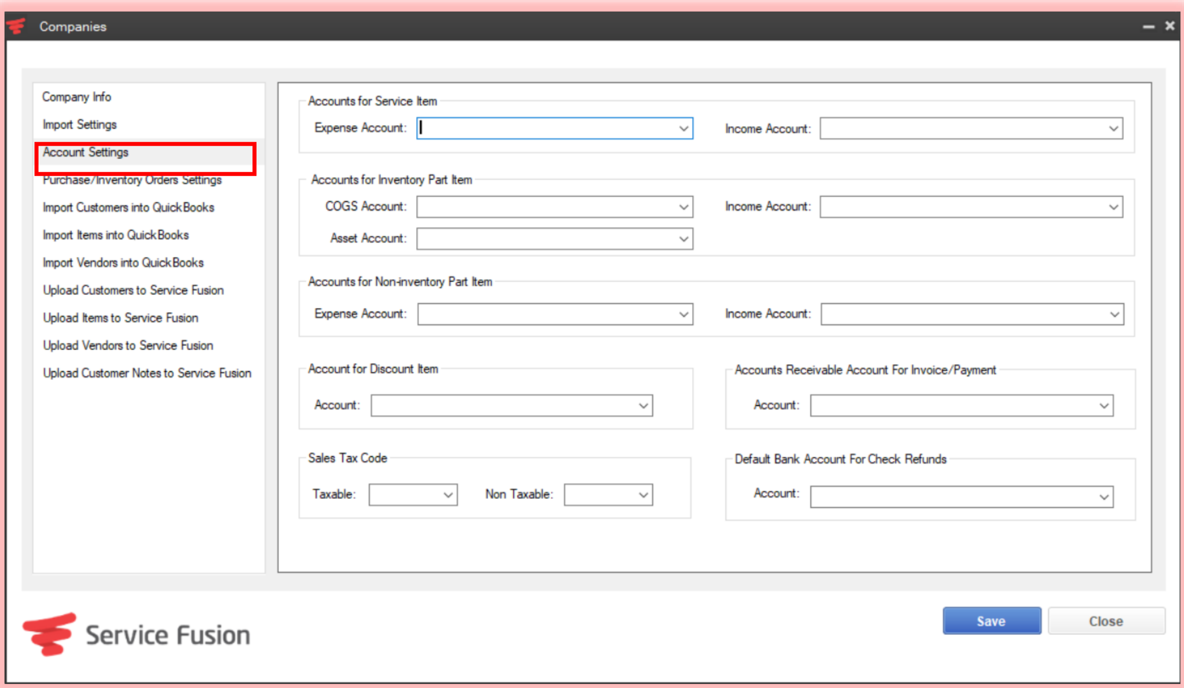


Step 4: Import Settings: The settings in this section will allow you to set data handling rules when importing data from Service Fusion to QuickBooks. These settings can be skipped if you do not want to enable any of these rules. If you do enable any of these rules, do not forget to click the '**Save**' button before navigating away.



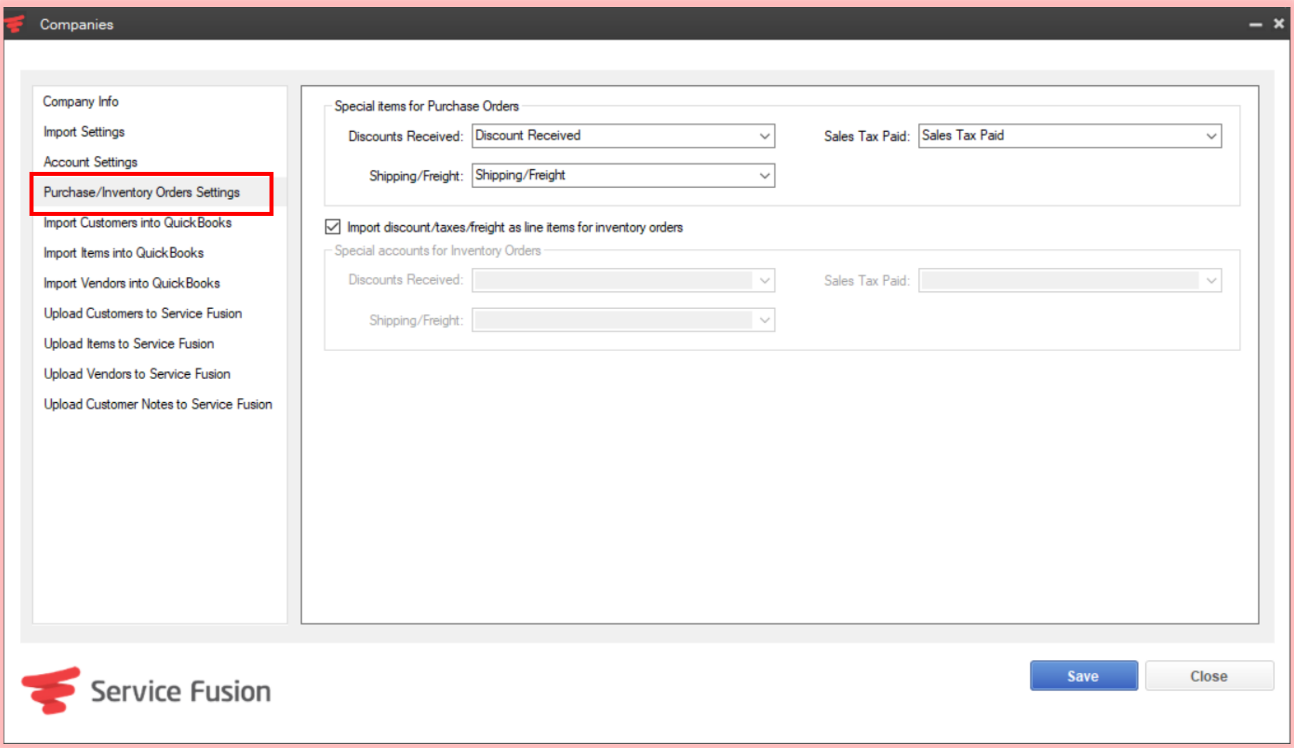
Step 5: Account Settings: This section must be completed before you can sync back to QuickBooks. Because these settings are determined by your own QuickBooks chart of accounts, you may need to speak to your accountant to ensure the proper accounts are selected. Do not forget to click the '**Save**' button before navigating away from this screen.

Note: If you are not tracking inventory in Service Fusion, you can skip the three options under the 'Accounts for Inventory Part Item'. You can also skip the 'Default Bank Account for Check Refunds' selection. All other options on this screen must be completed!



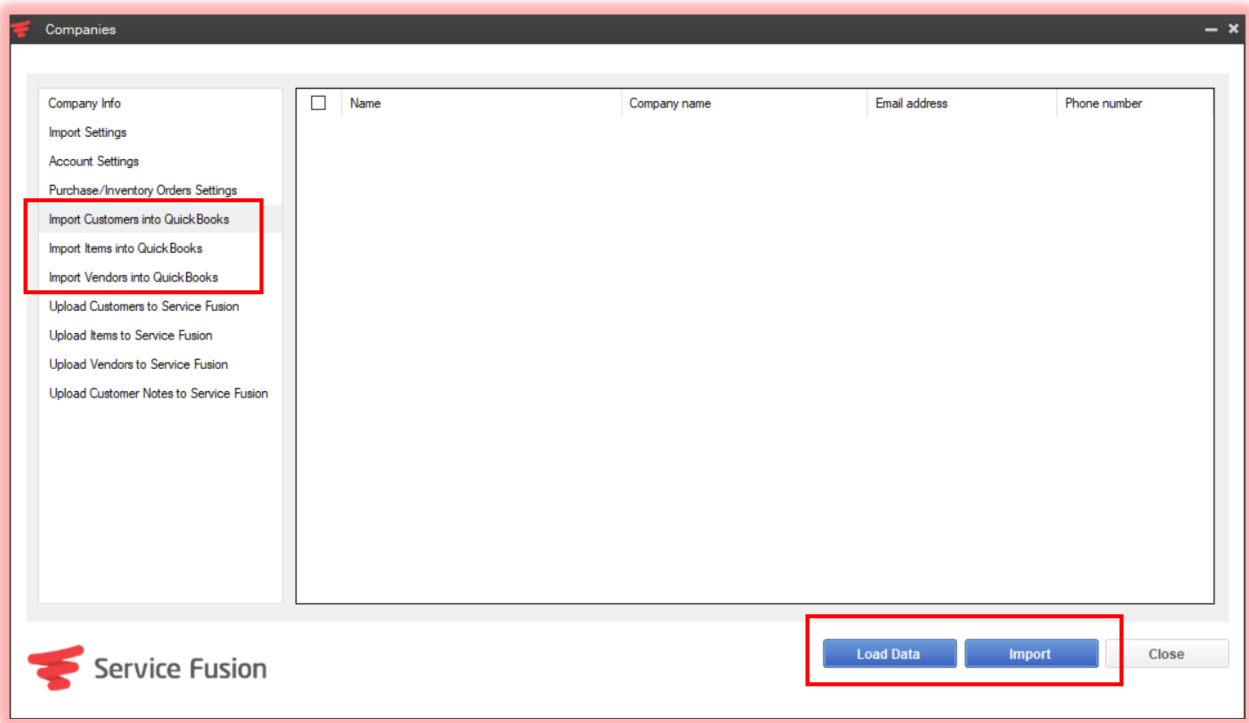
Step 6: Purchase/Inventory Orders Settings: These settings will apply only if you are syncing Purchase Orders and Inventory Orders. Do not forget to click the '**Save**' button before navigating away from this screen.

Note: If you are not syncing POs/Inventory Orders, you can skip this section.

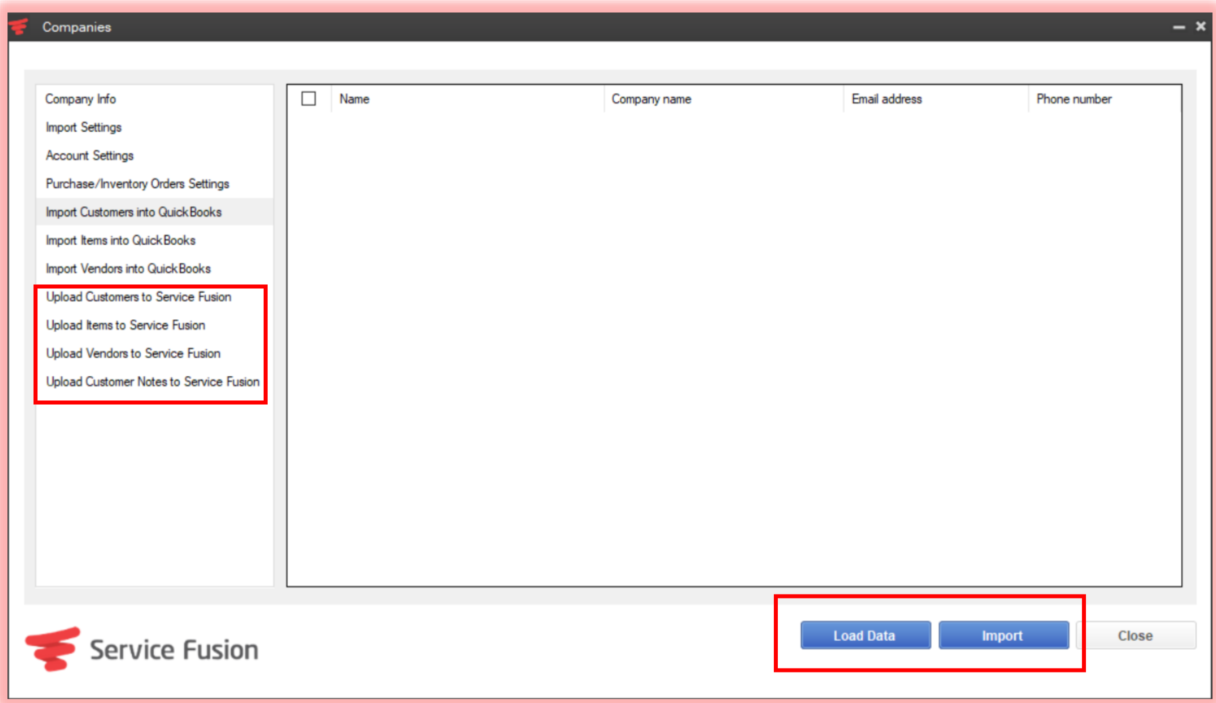


Step 7: Importing Data from Service Fusion to QuickBooks: These three options will allow you to import existing data (**Customers, Items, and Vendors**) from your Service Fusion account into your QuickBooks. Once you have selected the import option you need, click the '**Load Data**' button to populate the import list. Select the list items you would like to import and then click the '**Import**' button to begin the process.

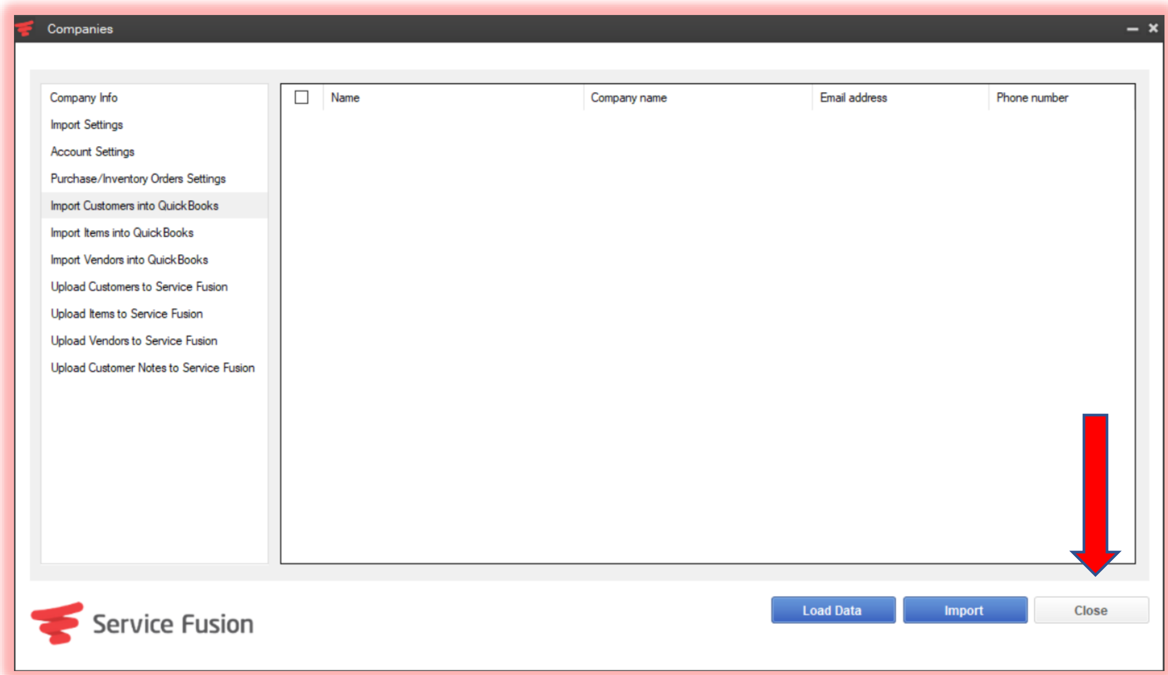
Note: If you are new to Service Fusion, your account will not have any data to sync. You may skip these import options.



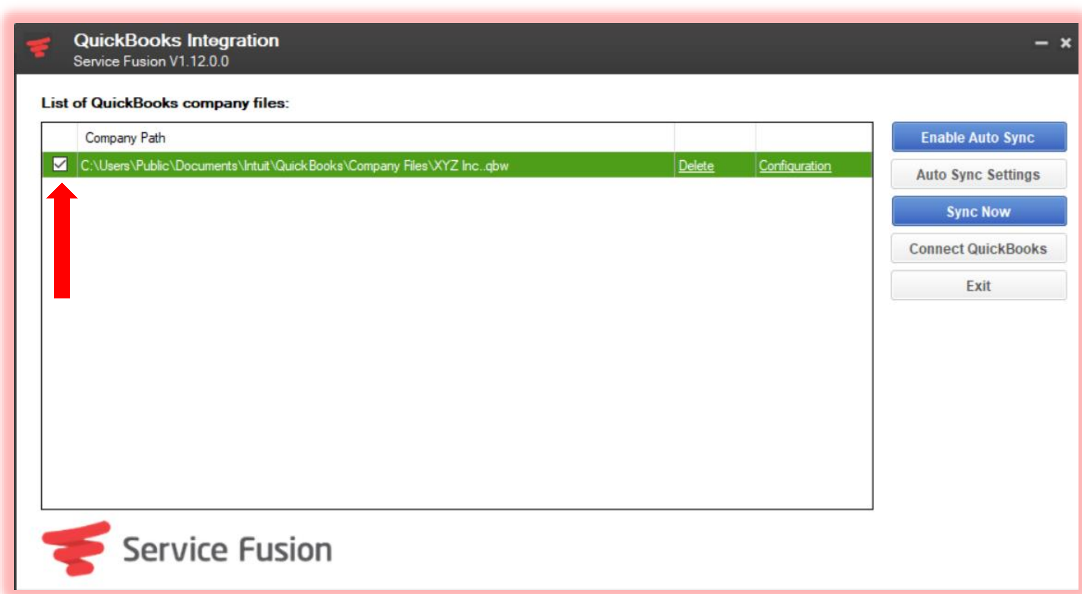
Step 8: Importing Data from QuickBooks into Service Fusion: These four options will allow you to import existing data (**Customers, Items, Vendors, and Customer Notes**) from QuickBooks into your Service Fusion account. Once you have selected the import option you need, click the '**Load Data**' button to populate the import list. Select the list items you would like to import and then click the '**Import**' button to begin the process.



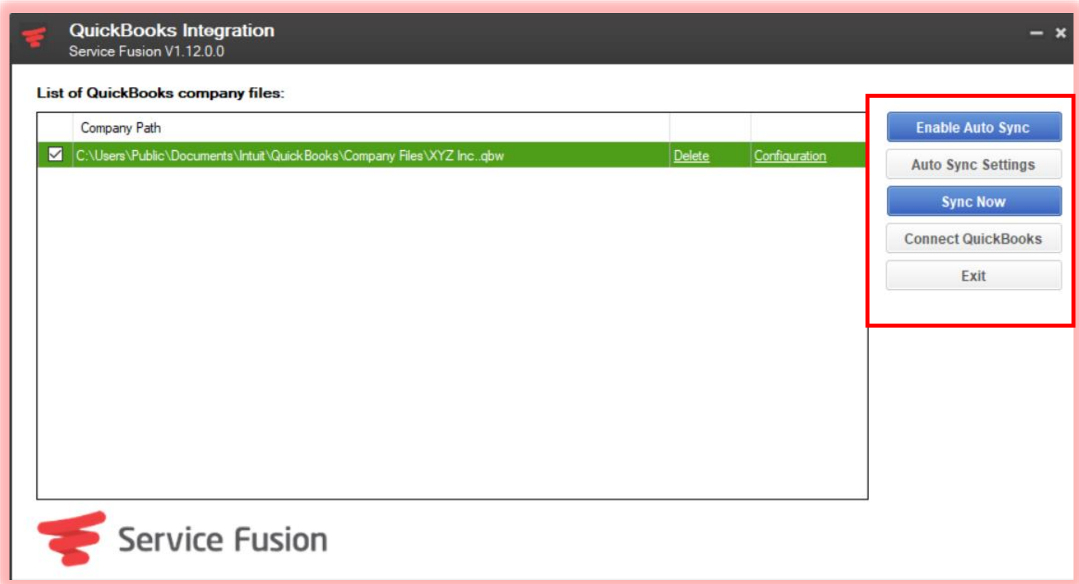
Step 9: Finalizing the connection and applying Auto Sync: Once your configurations are in place and your data has been imported, click the '**Close**' button to go back to the main screen:



The main screen will appear. You will now see your QuickBooks path highlighted in green within the Company Path window. Make sure the database has been selected by placing a checkmark in the box next to the path details:



Now review the options on the right-hand side of the main screen:



Enable Auto Sync: This setting will minimize the integrator and allow it will run in the background. It is recommended that you review the '**Auto Sync Settings**' prior to enabling the Auto Sync function.

Auto Sync Settings: This section will allow you to set your syncing schedule.

Sync Now: This option will force a manual sync. You can always perform a manual sync using this option.

Connect QuickBooks: This setting starts the integration process as outlined in this document.

Exit: This will close the integrator completely. Syncing will not be performed when the integrator closed.

Note: If you need to make adjustments to the configurations for your existing connection, click the 'Configuration' link, located within the green highlighted area next to your company file path.