

(007) QuickBooks Online - How to Setup, Sync, and Use with 1place

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How the 1place QuickBooks Online (QBO) Syncing Works

Big Picture - How it Works

- If you have an active **QuickBooks Online (QBO)** account (*Plus version or greater if selling Inventory*) you can connect to it from inside **1place**.
- When the **Use QuickBooks Online Integration Features** option is set to True, each time an applicable records type (*Customer, Item, Invoice, Credit Memo, Invoice Payment, or Purchase Order*) is created in **1place** the '**To Sync**' checkbox (on the new record being created) gets checked automatically. Then when the record is saved you will see a brief sync progress bar as it syncs with QuickBooks Online in real time.
- Each time an applicable record type is added or edited in QuickBooks Online a flag is set in QuickBooks online. Then when the 1place **Sync All** button is clicked 1place connects to QuickBooks Online and locates the new or changed records in QuickBooks Online and syncs them into 1place.
- You can selectively enable or disable different parts of the syncing process by turning them on and off in the QuickBooks Online Sync screen.
- When a record is 'changed' in 1place the 'Resync' flag gets checked and the changes will be synced when the record is changed.

How 1place Works with QuickBooks Online (Overview of Tasks and Where to Do Them)

Function or Data Type	Tasks Performed 1place	Tasks (QuickBooks Online)
Banking & GL - Chart of Accounts		
Banking & GL - General Ledger		
Banking & GL - Bank Accounts (Checks, Deposits, Adjustments)		
Banking & GL - Online Banking (Integrations)		
Banking & GL - Employee Payroll		
Banking & GL - Financial Reports		
Customers & Prospects - Basic Record	x	
Customers & Prospects - Contact Records	x	
Customers & Prospects - Additional Details	x	
Customers & Prospects - Scheduled & Completed Tasks	x	
Customers & Prospects - Customizable Lists	x	
Customers & Prospects - Documents (linked to Google Docs & Dropbox)	x	
Customers & Prospects - Detailed Reports	x	
Jobs & Projects - Details	x	
Jobs & Projects - Customizable Fields & Tabs		
Jobs & Projects - Customizable Lists	x	
Jobs & Projects - Detailed Reports	x	
Items (Parts List) - Basic Record	x	
Items (Parts List) - Item Details	x	
Items (Parts List) - Shipments	x	

Items (Parts List) - Vendors	x	
Items (Parts List) - Pricing Tools	x	
Items (Parts List) - Catalog (Alias Item Numbers & Descriptions)	x	
Items (Parts List) - Customizable Lists	x	
Items (Parts List) - Detailed Reports	x	
Purchase Orders - Basic PO record	x	
Purchase Orders - Automated PO Tools	x	
Purchase Orders - Customizable Lists	x	
Purchase Orders - Detailed Reports	x	
Sales - Quotations	x	
Sales - Sales Orders	x	
Sales - Invoices	x	
Sales - Credit Memo's	x	
Sales - Invoice Payments	x	
Sales - Invoice Statements		
Sales - Customer Portal (for Business to Business login to check stock, create Orders, etc)	x	
Sales - Other 3rd Party E-Commerce Integrations	x	
Sales - Other 3rd Party system to system integrations (CCC, Partslink, PartsTrader, etc)	x	
Sales - Detailed Reports	x	
Sys Admin Tools	x	
Vendors - Basic Record	x	x
Vendors - Contact Records.	x	
Vendors - Scheduled & Completed Activities.	x	
Vendors - Customizable Lists	x	
Vendors - Documents (linked to Google Docs & Dropbox)	x	
Vendors - Detailed Reports	x	
Warehouse Management - Pick Ticket Management	x	
Warehouse Management - Dispatching Deliveries	x	
Warehouse Management - Stock Transfers (to other warehouses)	x	
Warehouse Management - osScan (for scanning item counts, and items in and out of stock)	x	

Summary of What TO DO in QuickBooks Online

- General Ledger (GL) Management
 - Create and maintain 'Chart of Accounts'
 - GL Journal Entries
- Banking
 - Adding or editing Checks, Deposits, and adjustments to bank accounts in QuickBooks Online
 - Syncing QuickBooks Online banks accounts with your banks website version of your bank accounts. This will download new Checks, Deposits, and adjustments directly into the Bank Account in QuickBooks Online.
- Accounts Payable (AP)
 - Entering & Paying AP Bills. **Note:** Users can create AP Bills when using 1place Purchases Orders.
- Printing Financial Reports (Balance Sheet, Profit/Loss (Income Statement), Statement of Cash Flows)
- Payroll (if desired)

What does NOT sync with QuickBooks Online

The follow types of information do **NOT** sync with QuickBooks Online (because there is no place in QuickBooks Online to store the information):

- Certain Customer record fields (where no applicable field exists in QuickBooks Online).
- Customer Contact records (related to Customers and Vendors)
- Certain Vendor record fields.
- Certain Item record fields.
- Item Receipts (from PO Line Items received)
- Item Vendor records
- Item Price Levels
- Item Search Catalog
- Quotations
- Sales Orders
- Shipping / Receiving (To Pick, Picking, To Dispatch, In Route, etc)

A Few Known Imperfections in the QuickBooks Online to 1place (API) Integration

Pease read [this kba article](#).

What if I Want to Use QuickBooks (Online or Desktop) Completely Separate (and Never Use the Syncing feature for QuickBooks Online)?

1place has been designed to sync with QuickBooks Online to save a LOT of time and eliminate a lot of hassles. If you do NOT use the SYNCING feature this is the extra work you will have to do:

- Tracking Banking
 - You will need to receive payments from Customers in 1place and then either (1) make an Invoice in QuickBooks Online (QBO) and receive the payment against it too, or (2) just make a random deposit into your bank account.
- Tracking Accounts Payable (A/P)
 - You will need to manually create AP Bills for POs entered and received into 1place. This will make your inventory value (on balance sheet) increase, but with no syncing Invoices it will not decrease.
- Tracking Accounts Receivable (A/R)
 - If a customer pays your \$1,000 check for 10 invoices you will have to open up each invoice in 1place to receive part of the \$1,000 payment for each. (Also, If you try to sync these partial payments into QBO some time later on they will not sync properly).
 - (Until toward end of 2022 you CANNOT send Customer Statements from 1place. You must send Statements from QuickBooks. So, in order to send Statements you will need to re-enter every Invoice into QBO).
- Tracking Your Financials (Profit & Loss, Balance Sheet)
 - If you do not SYNC or HAND ENTER every single Invoice, with all line items, the INVENTORY valuation on Balance Sheet will NOT adjust back down. Also, the COST OF GOODS on Balance Sheet will NOT adjust up. So your Balance Sheet AND Profit/Loss will be incorrect.

Which Version of QuickBooks Online is best for 1place?

- NOTE: **1place** does NOT work with ANY of the downloadable / desktop versions QuickBooks.
- If your business DOES SELL inventory items then you can purchase the **Plus** or **Advanced** versions of QuickBooks Online.

- (Note: The **Plus** version will more than likely meet your needs just fine).
- If your business does NOT sell inventory then you can purchase the **Simple Start** or the **Essentials** version of QuickBooks Online.
 - To Purchase QuickBooks Online (or to create a Trial login) please visit: quickbooks.intuit.com/pricing/

Preparing QuickBooks Online for Syncing with 1place

Setting Up Your Chart of Accounts

- Log into your **QuickBooks Online** Account.
- Click **Accounting** (on the left menu bar).
- Compare the default Chart of Accounts with the Chart of Accounts you have used in OneSource (or any other accounting system).
- Click the New button to add any additional Accounts to match your previous accounting system.
- In order to Sync with 1 place, but sure to have the following accounts set up:

Account Type	Detail Type	Account Name	Account Number	
Accounts Receivable (A/R)	Accounts Receivable (A/R)	Accounts Receivable (A/R)	(Optional)	--This --Whe
Other Current Assets	Inventory	Inventory	(Optional)	--This --Whe --This --Whe
Other Current Assets	Undeposited Funds	Undeposited Funds	(Optional)	--This --Whe
Accounts Payable (A/P)	Accounts Payable (A/P)	Accounts Payable (A/P)	(Optional)	--This --Whe
Other Current Liabilities	Other Current Liabilities	Sales Order Deposits	(Optional)	--This --Whe
Income	Sales or Product Income	Sales	(Optional)	--This --Whe
Cost of Goods Sold	Supplies & Materials	Cost of Goods Sold	(Optional)	--This --Whe

Be sure to have the following If necessary, If necessary add additional Accounts

Setting Up Payment Terms

- Log into your **QuickBooks Online** Account.
- Click **Gear** (icon in top right corner) > **All lists** > **Terms**.
- Set up any desire payment terms you want to sync into **1place**.

Setting Up Payment Methods

- Log into your **QuickBooks Online** Account.
- Click **Gear** (icon in top right corner) > **All lists** > **Payment Methods**.
- Set up any desire payment methods you want to sync into **1place**. (These are used by 1place, but are not

required).

Setting Up Locations (to differentiate your Warehouses - if you have more than 1 warehouse)

- Log into your **QuickBooks Online** Account.
- Click **Gear** (icon in top right corner) > **All lists** > **Locations**.
- Click **New** to add a new **Location** for each Warehouse you want to track individual Sales.

Other Things to Set (before or after you connect QuickBooks Online to 1place)

- Create a Bank Account (GL Account) for each of your company's Bank Accounts.
 - (If desired, and highly recommended) Set up syncing between QuickBooks Online and your Banks website version of your account.
- Create 1 or more *Beginning Balance Journal Entries* to make your Balance Sheet accurate, as of the first of the year and/or as of the end of the month before you started using **1place**.
 - See KBA: [QuickBooks Online - Setting up \(and Balancing\) QuickBooks Online for use with 1place \(OneSource cloud version\)](#)

How to Connect 1place with QuickBooks Online (to Sync)

When to Turn on The QuickBooks Online Syncing

VERY IMPORTANT NOTE: Using the 1place interface (and working with OneSource Software tech support) virtually ANYTHING can be deleted from 1place. However, certain types of records in QuickBooks Online (Customers, Vendors, Items, etc) cannot be deleted. If you delete or deactivate them in 1place then can be deactivated (hidden) in QuickBooks Online but can never be deleted. This being the case we highly recommend NOT syncing Customers, Vendors, Items, Invoices, and PO's with QuickBooks Online until such time that you are ready to GoLive.

If you want to TEST the QuickBooks Online syncing processes you can follow these steps to selectively sync records:

1. Open the QuickBooks Online Sync Center.
2. Make sure the **Use QuickBooks Online (QBO) Integration Features** checkbox is CHECKED.
3. Make sure all 5 of the **Sync With QuickBooks Online** record types are UNCHECKED. This will automatically UNCHECK the TO SYNC checkbox when making new Customers, Items, etc
4. Selectively add 1 or more Test Customers, Vendors, Items, Invoices, and POs.
5. Before saving the new (or changed) Test records manually CHECK the **To Sync** checkbox and then save the record.
6. Check for the newly added or changed records in QuickBooks.
7. When finished performing your syncing test DELETE the records you created in **1place** and UNCHECK the **Use QuickBooks Online (QBO) Integration Features** option in the QuickBooks Online Sync Center in **1place**.

How to Show or Hide the QuickBooks Online Sync Center (icon)

- You can open the **QuickBooks Online Sync Center** by clicking on the small green QB icon (on the left menu bar) that look like this .
- If you cannot see this icon it may be turned off for your login. (You can define, user by user, if they are able to see this icon to allow them to open and use the **QuickBooks Online Sync Center**).
 - If you cannot see the icon you can display it by clicking the Gear (icon) > Settings > Users > (then click on the icon next to the user login you want to change)
 - Then click **Module Security** > then enable (or disable) the checkboxes next to the **QuickBooks Online Sync Center** option. This will display or hide the icon on the left menu bar for that user.

How to Check the 1place / QuickBooks Online connection state

- Click the icon to open the **QuickBooks Online Sync Center**.
- If **1place IS NOT** connect to **QuickBooks Online** it will display a popup screen that look like the screen below:
 - To **CONNECT QuickBooks Online** to **1place** just click on the green **Connect to QuickBooks** button and follow the steps to enter you QuickBooks Online login username and password.
 - After you have connected the screen will enlarge to show many additional settings and will also, most likely, receive a confirmation email from QuickBooks / Intuit.
- If **1place IS already connected** to **QuickBooks Online** it will display a large screen with many settings and you will see a GREEN BAR across the top of the screen which reads: **1place is connected to QuickBooks Online**.

How to Open the QuickBooks Online Sync Center screen

- Click on the icon (on the left menu bar).

How to Turn the QuickBooks Online Syncing On and Off

- Click on the icon (on the left menu bar) to open the **QuickBooks Online Sync Center**.
- In the **QuickBooks Online Integration** section there is a setting to enable or disable the Syncing mechanism.
 - To turn the Sync ON: **CHECK** the 'Use QuickBooks Online (QBO) Integration Features'.
 - To turn the Sync OFF: **UNCHECK** the 'Use QuickBooks Online (QBO) Integration Features'.

How to Make Certain Modules Require Manual Syncing

- Click on the icon (on the left menu bar) to open the **QuickBooks Online Sync Center**.
- When the 'Use QuickBooks Online (QBO) Integration Features' IS CHECKED, **1place** will Sync newly added or edited (applicable type) records when the RED Save or Commit buttons are clicked AND the 'To Sync' or 'Resync' checkbox is checked.
- 1place will automatically place a CHECK in the **To Sync** checkbox on all new (applicable type) records when the following checkboxes are checked:
 - Put another way, if any of the checkmarks above are UNCHECKED then when new records of that type are created the To Sync will NOT be auto checked. If you want to sync that record you will need to manually select the To Sync checkbox.

How to Setup New Item Defaults

- Prerequisites: Be sure to complete all applicable items in the section above called **Preparing QuickBooks Online for Syncing with 1place.**
- Click on the icon (on the left menu bar) to open the **QuickBooks Online Sync Center**. Then locate the section called **Set Default Account & Item Type**:
- When a new Item is manually added (or imported) into **1place** the following Defaults are used to auto fill in certain fields for the new item (to make sure the item will sync correctly with **QuickBooks Online**):
 - **Is Taxable** sets the item to be Taxable. It is a good idea to set this to True. If a Customer is set to Tax Exempt none of the items on an Invoice will be taxed for that Customer.
 - **Item Type**.
 - If you primarily sell *tangible* items set this default value to **Inventory**. (This will enable **1place** and **QuickBooks Online** to track the inventory levels for the item).
 - If you primarily sell services set this default value to **Service**.
 - **Sales Income Account**. Select the **Sales** account you created in **QuickBooks Online**.
 - **Cost of Goods Sold Account**. Select the **Cost of Goods Sold** account you created in **QuickBooks Online**.
 - **Inventory Asset Account**. Select the **Inventory** account you created in **QuickBooks Online**.
 - **Undeposited Funds Account**. Select the **Undeposited Funds** account you created in **QuickBooks Online**.
 - **Sales Order Deposits Account** (*not shown in picture above*). Select the **Sales Order Deposits** account you created in **QuickBooks Online**.
 - **Accounts Receivable Account**. Select the **Accounts Receivable** account you created in **QuickBooks Online**.
 - (Optional) **Payment Method**. Select a default **Payment Method** you created in **QuickBooks Online**. If desired, you can leave this field blank.
 - (Optional) **Payment Term**. Select a default **Term** you created in **QuickBooks Online**. If desired, you can leave this field blank.

Converting QuickBooks (Desktop Version) to QuickBooks Online (Cloud Version)

- HOW TO CONVERT: <https://www.youtube.com/watch?v=9thlkfc9uq8>

Learning How to Use QuickBooks Online

- Hector Garcia - CPA - (QuickBooks Guru)
 - FREE - 9-hour QuickBooks Online 2022 Tutorial Playlist (by Hector Garcia - CPA): <https://hectorgarcia.com/playlist>
- Intuit / QuickBooks Online
 - [Introduction to QuickBooks Online](#)
 - [Advantages of QuickBooks Online \(over QuickBooks Desktop\) - Playlist](#)
 - [QuickBooks Online - How To's \(Playlist\)](#)

Exporting & Importing QuickBooks Online Data

How to Export QuickBooks Online Customers, Vendors, Items, Invoices, and Purchase Orders

- See the GREEN section above for details about how to connect 1place to QuickBooks Online to SYNC all of these record types between 1place and QuickBooks Online.

How to Export QuickBooks Online (QBO) List IDs

If you are importing data from an older system into **1place** and you want the **Payment Terms** and **Payment Methods** and **Location (warehouse)** to sync properly with **QuickBooks Online** you will have these 2 options:

- Option 1: Make sure the Payment Terms, Payment Method, and the Warehouse has the identical spelling as the equivalent values in QuickBooks Online. When using the 1place Import Wizard it will convert the value to the proper QBO LIST ID in QuickBooks Online.
- Option 2: Export a list of QBO LIST IDs from 1place (after you have establish the connection between 1place and QuickBooks Online) by following these steps:
 - Open the **QuickBooks Online Sync Center** in **1place**.
 - In the section called '**Download All QuickBooks Online Supporting Lists**' click on the **Download** button. This will download all **QuickBooks Online** List IDs in an Excel file. Insert the proper list ID for each **Payment Term**, **Payment Method**, and **Location (Warehouse)** in the proper column on the Excel files you plan to import into **1place**. This will assure that the proper values get synced correctly in **QuickBooks Online**.

How to Export QuickBooks Online CUSTOM fields

- Notes about QuickBooks Online Custom fields (as of 9/4/21).
 - Most versions of QuickBooks Online allows for the creation of 3 custom fields.
 - QuickBooks Online Advanced allows for up to 12 fields. HOWEVER, as of this writing, the QuickBooks API does NOT provide a way to SYNC data to or from the custom fields.
 - Due to the inconsistency we do NOT have a way to automatically sync QuickBooks custom fields into 1place. You will need to follow the steps below to export and import the data semi-automatically.
- Follow these steps to EXPORT your QuickBooks Online Custom fields:
 - From the **Reports** menu, select **Customers & Receivables**.
 - Select **Customer Contact List**.
 - At the top left, click **Customize Report**.
 - From the **Display** tab, put a check mark next to each custom fields you wish to export under COLUMNS.
 - Click **OK**.
- Follow these steps to export Custom fields for **Vendors & Payables**
 - From the **Reports** menu, select **Vendors & Payables**
 - Select Vendor Contact List.
 - At the top left, click **Customize Report**.
 - From the **Display** tab, put a check mark next to each custom fields you wish to export under COLUMNS.
 - Click **OK**.

How to Import QuickBooks Online CUSTOM fields into 1place

- Create new Custom fields in 1place to receive the Custom fields data coming from QuickBooks Online following the steps on this KBA: [Custom Fields \(creating, importing into, etc\)](#)
 - Import your Custom fields into 1place following the steps on this KBA: [Custom Fields \(creating, importing into, etc\)](#)
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