

# QuickBooks Online - Sales Taxes with OneSource

Last Modified on 08/25/2026 6:14 pm EDT

## IMPORTANT NOTES

- As of this writing, on April 29, 2019, QuickBooks Online has NOT created a fully automated way to create and sync Sales Taxes. Quickbooks IS telling us that it is 'coming' but has not given an exact date yet. So, until such time that it can be fully automated, we have provided the following 'work around' solutions.
- As of this writing, on July 25, 2019, after gaining deeper knowledge of how the QBO API works, including its limitations, it is now clear that the Steps below need to be re-written. This will be completed by Steve Childs asap.

## ~~If you have been using QuickBooks Online AND are using the Automated Sales Taxes (AST)~~

1. Click on the green **QBO Sync** button on the bottom left corner of the OneSource screen:
2. Sync the **"Taxes"** under the **"QuickBooks Online to OneSource (One Way Sync)"** Sub-form:
3. After **"Taxes"** Sync, User can see their **"Tax Agency"** Under **Settings > Sales > General Settings > Sales Tax Rates**:
4. For AST Companies, we can retrieve only **"Tax Agency"** names. You will need to enter the **"Sales Tax Percentage"** for each Tax Agency created by the Syncing process. Note: If you want to add more Tax Agencies, you can do this on the Settings form:
5. All the Tax Agencies will be displayed (on all Transaction screens) with the corresponding Tax Percentage like **"California (8%)"**:
6. Once you have selected any Tax, based on the **"Line-item Tax Check Box"** and **"Tax Percentage"** drop down, the Tax amount will be calculated and Tax amount will be shown in corresponding Text box:
7. When Syncing with QuickBooks the Exact Tax amount will be shown on the QuickBooks Invoice:

NOTE: The main difference between this option, and the option below is QBO WILL make the Tax Agency automatically AND will sync it into OneSource automatically.

## ~~If you have been using QuickBooks Online and using simple Tax Codes (NOT the Automated Sales Tax (AST))~~

For Non-AST Companies, QuickBooks Online (QBO) doesn't allow you to create the Tax Code automatically. So, you must create Tax Codes from your QBO account and then sync the Tax to OneSource following these steps:

1. Click on the green **QBO Sync** button on the bottom left corner of the OneSource screen:
2. Sync the **"Taxes"** under the **"QuickBooks Online to OneSource (One Way Sync)"** Sub-form:

3. After "Taxes" Sync, User can see their "Tax Agency" Under Settings > Sales > General Settings > Sales Tax Rates.
4. All the Tax Agencies will be displayed (on all Transaction screens) with the corresponding Tax Percentage like "California (8%)".
5. Once you have selected any Tax, based on the "Line-item Tax Check Box" and "Tax Percentage" drop down, the Tax amount will be calculated and Tax amount will be shown in corresponding Text box.
6. When Syncing with QuickBooks the Exact Tax amount will be shown on the QuickBooks Invoice.

## **If you have been using OneSource and are now just beginning to use QuickBooks Online (Sync)**

1. Do this
  2. do that...
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