# Quickbooks Online - How to Setup, Connect & Sync with 1place

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Overview

The **QuickBooks Online (QBO) Integration** allows 1place to synchronize supported records between 1place and QuickBooks Online.

The integration is managed through the **QuickBooks Online Sync Center** in 1place. It controls the QuickBooks Online connection, synchronization settings, account mapping, and synchronization of supported records.

Use this article to set up the QuickBooks Online connection, configure synchronization, and test the integration.

> **Note:** QuickBooks Online is updated regularly by Intuit. Menu names and screen layouts may change. The QuickBooks Online navigation in this article is based on Intuit's current documentation.

## Help Topics



## Preparing QuickBooks Online

Before connecting QuickBooks Online to 1place, review the customer's QBO configuration and make sure the required accounts and supporting lists are available.

### Chart of Accounts

The **Chart of Accounts** contains the accounts QuickBooks Online uses to classify transactions.

To access the Chart of Accounts:

1. Select **All apps**.

2. Select **Accounting**.

3. Select **Chart of accounts**.

The customer's Chart of Accounts should contain the accounts required by the 1place integration and their accounting workflow.

Common accounts may include:

- Accounts Receivable
- Accounts Payable
- Inventory Asset
- Sales Income
- Cost of Goods Sold
- Undeposited Funds
- Sales Order Deposits

The actual accounts required depend on the customer's configuration.

> **Related KBA:** QuickBooks Online - Preparing and Balancing QuickBooks Online for use with 1place

## Payment Terms

To manage payment terms in QuickBooks Online:

1. Select **Settings** ⚙.
2. Select **All lists**.
3. Select **Terms**.
4. Create or edit the required terms.

Payment Terms used in 1place should correspond to the customer's QuickBooks Online terms when the integration requires the values to match.

## Payment Methods

To manage payment methods:

1. Select **Settings** ⚙.
2. Select **All lists**.
3. Select **Payment Methods**.
4. Create or edit the required payment methods.

## Locations

If the customer uses multiple locations, enable location tracking in QuickBooks Online.

To enable location tracking:

1. Select **Settings** ⚙.
2. Select **Account and settings**.
3. Select **Advanced**.
4. Locate **Categories**.

5. Select **Edit**.
6. Turn on **Track locations**.
7. Select **Save**, then **Done**.

To create a location:

1. Select **Settings** ⚙.
2. Select **All lists**.
3. Select **Locations**.
4. Select **New**.
5. Enter the location information.
6. Save the location.

### Inventory

QuickBooks Online inventory tracking is available with **QuickBooks Online Plus and Advanced**.

If the customer tracks inventory in QBO, verify that inventory tracking is enabled and that the required inventory accounts are configured.

## Connecting QuickBooks Online to 1place

1. Open the **QuickBooks Online Sync Center** in 1place.
2. Select **Connect to QuickBooks**.
3. Sign in to the customer's QuickBooks Online account.
4. Authorize the connection to 1place.
5. Return to the **QuickBooks Online Sync Center**.
6. Verify that the connection is active.

Once connected, the Sync Center provides access to the available QuickBooks Online integration settings.

## Configuring QuickBooks Online Integration

### Enable QuickBooks Online Integration

1. Open the **QuickBooks Online Sync Center**.
2. Locate **Use QuickBooks Online (QBO) Integration Features**.

3. Select the option to enable the integration.
4. Save the settings if required.

When enabled, supported records can be synchronized between 1place and QuickBooks Online.

## Disable QuickBooks Online Integration

1. Open the **QuickBooks Online Sync Center**.
2. Locate **Use QuickBooks Online (QBO) Integration Features**.
3. Clear the option.
4. Save the settings if required.

Disabling the integration stops synchronization but does not necessarily remove the existing QuickBooks Online connection.

# Configuring New Item Defaults

The QuickBooks Online Sync Center contains default settings used when applicable new items are synchronized from 1place to QuickBooks Online.

Configure the applicable defaults:
- **Is Taxable**
- **Item Type**
- **Sales Income Account**
- **Cost of Goods Sold Account**
- **Inventory Asset Account**
- **Undeposited Funds Account**
- **Sales Order Deposits Account**
- **Accounts Receivable Account**
- **Payment Method**
- **Payment Term**

Select the appropriate values based on the customer's QuickBooks Online configuration.

For inventory items, make sure the selected Item Type and accounts correspond to the customer's inventory accounting setup.

# Configuring Record Synchronization

The QuickBooks Online Sync Center allows synchronization to be controlled by record type.

Supported record types may include:
- Customers
- Vendors
- Items
- Invoices

- Credit Memos
- Invoice Payments
- Purchase Orders

The available synchronization options depend on the current 1place configuration.

## Automatic Synchronization

When automatic synchronization is enabled for a supported record type, applicable records can be automatically marked for synchronization.

## Manual Synchronization

If a record type is configured for manual synchronization, the record must be selected for synchronization before it is sent to QuickBooks Online.

This allows the customer to control which records are transferred.

# Synchronizing Records

## To Sync

The **To Sync** option identifies a record that should be synchronized with QuickBooks Online.

For a record that needs to be synchronized:

1. Open the record in 1place.
2. Select **To Sync**.
3. Save the record.
4. Allow the synchronization process to run.
5. Verify the record in QuickBooks Online.

## Resync

Use **Resync** when an existing synchronized record needs to be sent to QuickBooks Online again.

1. Open the applicable record.
2. Make the required changes.
3. Select **Resync**.
4. Save the record.
5. Verify the updated information in QuickBooks Online.

## Checking the QuickBooks Online Connection

Use the **QuickBooks Online Sync Center** to verify the current connection between 1place and QuickBooks Online.

Review the connection status before troubleshooting synchronization problems.

If the connection is not active:

1. Confirm that the QuickBooks Online company is accessible.
2. Verify that the correct QBO company was connected.
3. Review the connection status in the Sync Center.
4. Reconnect the account when required.
5. Test synchronization with a small number of records.

## Testing the Integration

Test the integration before enabling synchronization for the customer's production data.

1. Connect QuickBooks Online to 1place.
2. Enable the QBO integration.
3. Configure the required synchronization settings.
4. Create a test customer in 1place.
5. Select **To Sync** when required.
6. Save the customer.
7. Verify the customer in QuickBooks Online.
8. Test an item.
9. Test an invoice.
10. Test a payment or other applicable transaction.
11. Modify an existing synchronized record.
12. Use **Resync** when applicable.
13. Verify the updated record in QuickBooks Online.

Once the test results are correct, enable the required synchronization settings for the customer's production workflow.

> **Important:** Do not enable unrestricted synchronization on an existing production database until the integration has been tested and the customer is ready to synchronize live data.

# QuickBooks Online Integration Notes

## Records and Fields

Not every 1place record or field has a corresponding QuickBooks Online field.

Examples of information that may be specific to 1place include:

- Customer Contacts
- Item Vendor information
- Item Price Levels
- Item Search Catalog
- Quotations
- Sales Orders
- Warehouse information
- Shipping and receiving information

The exact information synchronized depends on the current 1place integration.

## QuickBooks Online Custom Fields

QuickBooks Online's current custom-field functionality has changed significantly from the older version documented in the original KBA.

Current QBO supports custom fields for areas such as customers, vendors, sales forms, purchase orders, expenses, and projects depending on the QBO subscription.

Do **not** assume that a QuickBooks Online custom field will synchronize with a 1place field. Confirm the field's support in the current 1place integration before using it as part of a synchronization workflow.

## QuickBooks Desktop

This integration is for **QuickBooks Online**. QuickBooks Desktop should not be treated as an equivalent connection.

## Integration Limitations

The QuickBooks Online integration has known limitations and differences between 1place and QBO.

> **Related KBA:** QuickBooks Online - Imperfections In the Integration with 1place.cloud