BEFORE YOU BEGIN USING SCHEDULEINTERPRETER WITH QBO

RELATIONSHIPS BETWEEN TWO PLATFORMS

Both, ScheduleInterpreter® and QuickBooks Online (QBO) store and process financial data. As a more advanced platform, ScheduleInterpreter® allows setting up dynamic rates for vendors and clients, provides tools for users alter corporate and personal records of the customer accounts and vendors in real time, and many more features not available in QBO. As a result, ScheduleInterpreter® is designated as a parent platform, a term used to describe the source of the most accurate and up to date data. Unless specified, QBO is set a child platform.

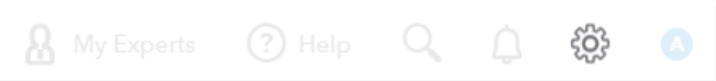
In this relationship, data stored in ScheduleInterpreter® will always override data stored in QBO.

Chart of accounts and invoice items are two, most often utilized data sets, that are maintained by QBO and are linked to ScheduleInterpreter® transactions.

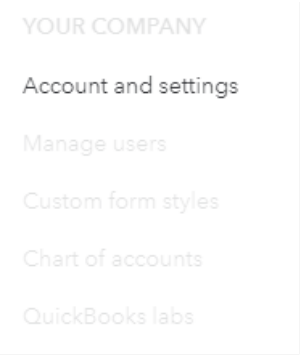
ADVANCED SUBSCRIPTION

Make sure your QuickBooks online is configured as Advanced. Without using Advanced subscription number of classes is limited to 40.

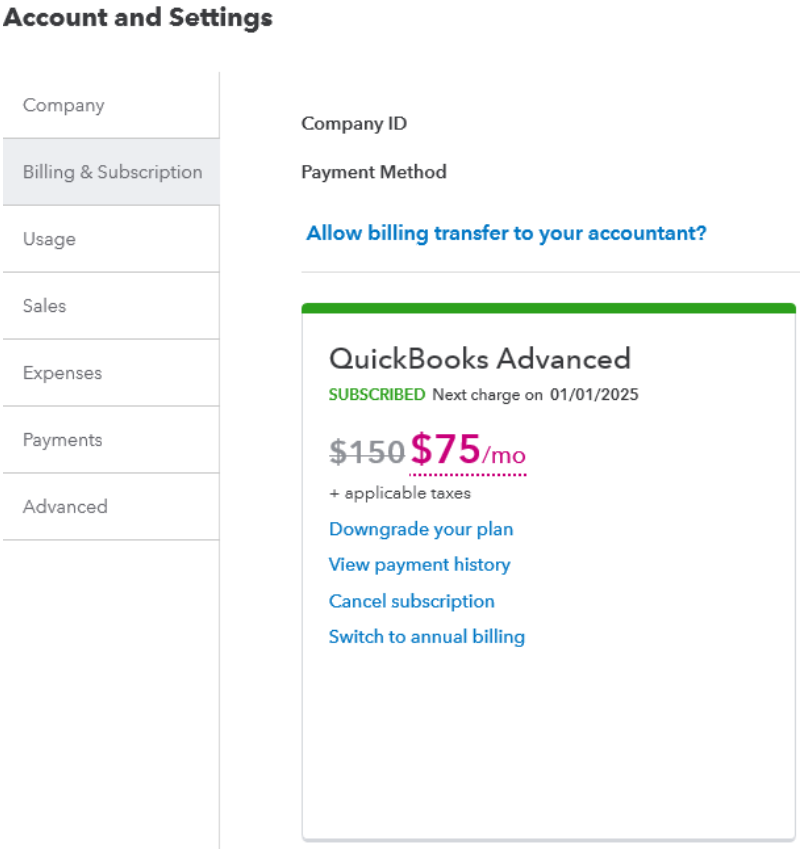
Login to your QuickBooks account and use gear icon located in the top right corner of the screen.



Locate and click on the Account and settings option under YOUR COMPANY menu.

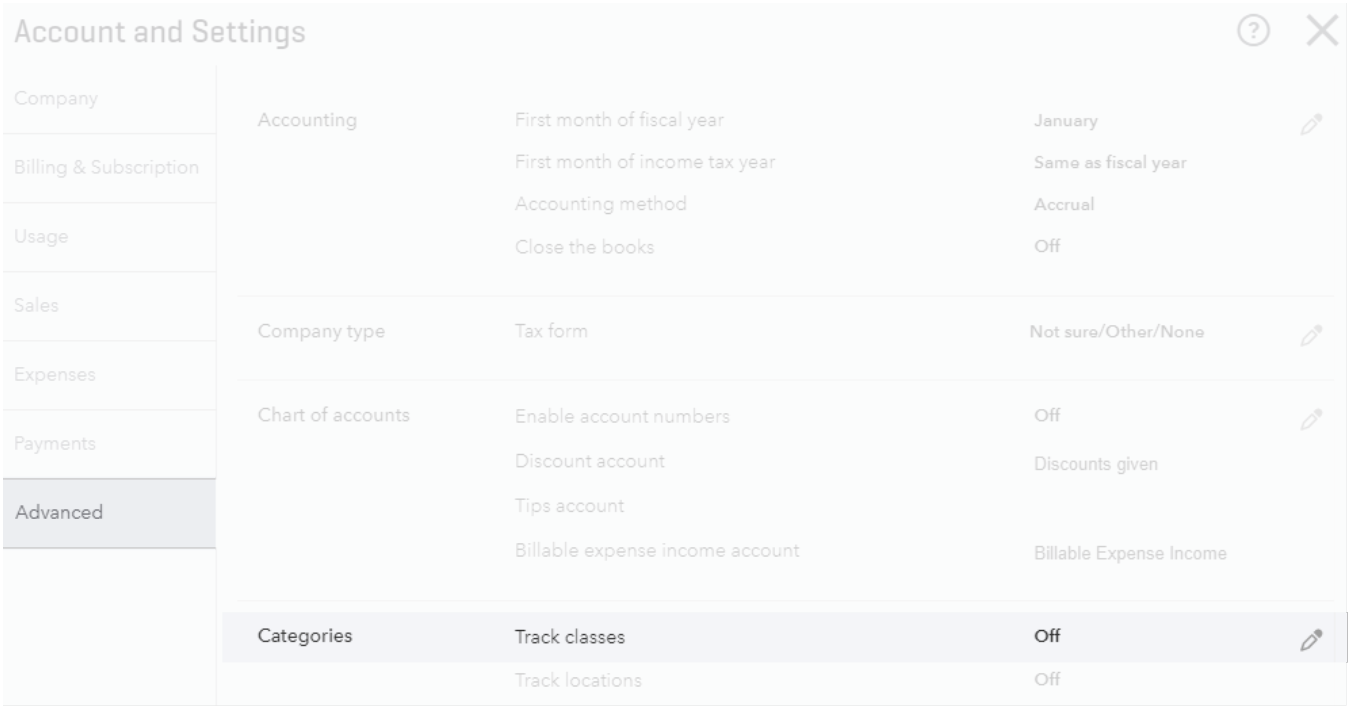


When screen changes to Account and Settings, select Billing & Subscription and make sure QuickBooks Advanced is selected. ScheduleInterpreter automatically attaches classes to transactions, helping your accounting and management teams produce various reports.

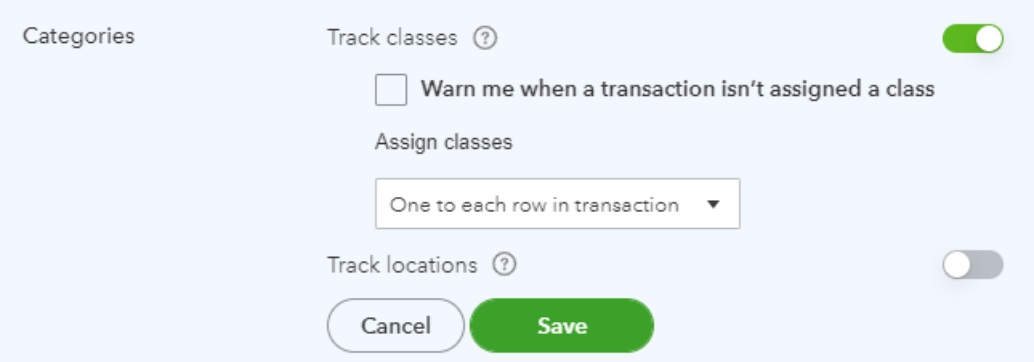


TRACK CLASSES

Continue to Advanced option. Under Categories > Track classes use pencil icon, located on the right side of the screen, to change settings.



Activate Track classes option using the switch on the right side and click Save button to complete your configuration.



Revision #9
Created Wed, Apr 28, 2021 4:36 AM by manual admin
Updated Thu, Jul 21, 2022 1:56 PM by manual admin