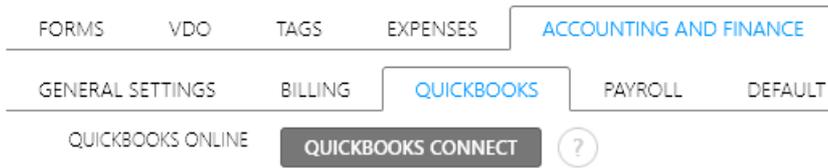


# CONNECT TO QBO

## ESTABLISHING CONNECTION

Navigate to TOOLS AND SETTINGS > Control center > ACCOUNTING AND FINANCE > QUICKBOOKS.

### CONTROL CENTER



Click on **QUICKBOOKS CONNECT** button to begin authentication process.

You will be presented with a Sign In window from Intuit, asking for your e-mail or user ID and password, associated with your account.



## Sign In

One account for everything Intuit, including QuickBooks. [Learn more](#)

 Sign in with Google

or

Email or user ID

jane@bestinterpreters.com

Password

●●●●●●●●●●●●●●●●

Remember me

 Sign In

*By selecting Sign In or Sign in with Google, you agree to our [Terms](#) and have read and acknowledge our [Global Privacy Statement](#).*

[I forgot my user ID or password](#)

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When multiple companies are using QBO, an option to select which QBO account will be used to connect to ScheduleInterpreter® will be shown. Select the company of your choice and click on Next button.

### Please select your company

Search for a company

No, thanks

Next



QBO will provide new window to confirm your selection and for security purpose will display ScheduleInterpreter® logo, informing you that you are allowing ScheduleInterpreter to update your QuickBooks Online data. Click on Connect button to proceed.

## Connecting ScheduleInterpreter to Best Interpreters, Inc.

### Let's connect ScheduleInterpreter

Select **Connect** below to get started using ScheduleInterpreter.

- ✓ By selecting **Connect**, you allow ScheduleInterpreter to view and update your QuickBooks Online data, as explained below

No, thanks

Connect

Intuit and ScheduleInterpreter may share the information in your Intuit and ScheduleInterpreter accounts. Your relationship to ScheduleInterpreter and its use of your information are subject to ScheduleInterpreter's [Terms of Service](#) and [Privacy Policy](#). To learn more about how Intuit uses your data, see our [Privacy Statement](#).

Disconnect ScheduleInterpreter anytime from your MyApps page.



The content of the window will change and show the following message. Click on Close Window button to complete the connection.

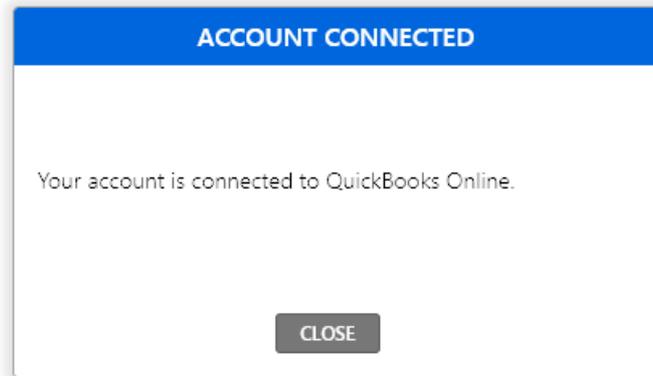
## QUICKBOOKS ONLINE CONNECTION SUCCESS

CONNECTED TO QUICKBOOKS ONLINE

Your account is now connected to QuickBooks Online.

Close Window

Returning to CONTROL CENTER will also show a pop-up message confirming successful connection.



## MANAGE QBO CONNECTION

When connection between ScheduleInterpreter® and QBO is established, new options to manage connection between two platforms become available.

**QUICKBOOKS DISCONNECT** - button allowing selected QBO account to be disconnected from ScheduleInterpreter®.

**RESET ACCOUNTS** - button initiates the process of removing connection details for all accounts. No records or transactions are removed in ScheduleInterpreter® or QBO. All connection details can be restored when QBO sync option is used, or when the account is configured with scheduled or live updates.

**RESET INVOICES** - button initiates the process of removing connection details for all customer invoices. No records or transactions are removed in ScheduleInterpreter® or QBO. All connection details can be restored when QBO sync option is used, or when the account is configured with scheduled or live updates.

**RESET VENDORS** - button initiates the process of removing connection details for all vendors. No records or transactions are removed in ScheduleInterpreter® or QBO. All connection details can be restored when QBO sync option is used, or when the account is configured with scheduled or live updates.

**RESET BILLS** - button initiates the process of removing connection details for all vendors' bills. No records or transactions are removed in ScheduleInterpreter® or QBO. All connection details can be restored when QBO sync option is used, or when the account is configured with scheduled or live updates.



Vendor bills in QBO are the equivalent of vendor payments in ScheduleInterpreter®.

## CONFIGURE GLOBAL DATA EXCHANGE SETTINGS

For better reporting, use the following options to enhance how data is being populated in QBO.

CLIENT INVOICE LINE ITEM CLASS instructs QBO to apply specific class to each line item of the customer

invoice. For example, assignment billed for services rendered in Spanish will allow to classify all items on the invoice associated with the assignment as Spanish. Using this option enables QBO to produce reports identifying revenue associated with each service. For example, QBO will be able to report items such as parking or tolls billed under Spanish services. To activate this option, select Service name from the drop down menu.

CLIENT INVOICE LINE ITEM CLASS  ?

Similarly to the customer accounts, vendor bills line items can also be classified, using services. To activate this option check USE LANGUAGE/SERVICE AS LINE ITEM CLASS IN VENDOR INVOICES .

USE LANGUAGE/SERVICE AS LINE ITEM CLASS IN VENDOR INVOICES  ?

Update account your vendor bills will be filed under. This and other liability accounts will be enlisted under VENDOR BILL QBO ACCOUNT selection. Open the menu and select account of your choice.

VENDOR BILL QBO ACCOUNT  ?



Do not change other settings in the QUICKBOOKS tab. These options control export to desktop edition of QuickBooks and should be used for backward compatibility only.

## CONFIGURE ACCOUNTS AND ITEMS EXCHANGE SETTINGS

Navigate to TOOLS AND SETTINGS > ACCOUNTS AND USERS > Account center and select any account on the list and click **EDIT** button. Continue to ACCOUNTING AND FINANCE > QUICKBOOKS tab.

There are 3 tabs to be configured: INVOICE ITEMS, INCOME ACCOUNTS and COST OF SERVICES (COST OF GOODS SOLD). Settings within each tab are linked to the organization's QBO account.

Starting with INVOICE ITEMS, use drop down menus to select corresponding invoice item from QBO.

## INVOICE ITEMS

ON-SITE INTERPRETING	<input type="text" value="Interpreting:OSI"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
OPI INTERPRETING	<input type="text" value="Interpreting:OPI"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
VRI INTERPRETING	<input type="text" value="Interpreting:VRI"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
TRAVEL TIME	<input type="text" value="Interpreting:Travel time"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
MILEAGE	<input type="text" value="Interpreting:Miles"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
PARKING	<input type="text" value="Interpreting:Parking"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
FEES	<input type="text" value="Interpreting:Fees"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
TOLLS	<input type="text" value="Interpreting:Tolls"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
PER DIEM	<input type="text" value="Interpreting:Per diem"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
ADJUSTMENT	<input type="text" value="Interpreting:Adjustments"/>	<input type="button" value="v"/>	<input type="button" value="?"/>

Continue with INCOME ACCOUNTS, use drop down menus to select corresponding income accounts configured under **COA** in QBO.

## INCOME ACCOUNTS

ON-SITE INTERPRETING	<input type="text" value="Interpreting:OSI"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
OPI INTERPRETING	<input type="text" value="Interpreting:OPI"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
VRI INTERPRETING	<input type="text" value="Interpreting:VRI"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
TRAVEL TIME	<input type="text" value="Interpreting:Travel time"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
MILEAGE	<input type="text" value="Interpreting:Miles"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
PARKING	<input type="text" value="Interpreting:Parking"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
FEES	<input type="text" value="Interpreting:Fees"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
TOLLS	<input type="text" value="Interpreting:Tolls"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
PER DIEM	<input type="text" value="Interpreting:Per diem"/>	<input type="button" value="v"/>	<input type="button" value="?"/>
ADJUSTMENT	<input type="text" value="Interpreting:Adjustments"/>	<input type="button" value="v"/>	<input type="button" value="?"/>

Continue with COST OF SERVICES (COST OF GOODS SOLD), use drop down menus to select corresponding COGS accounts configured under **COA** in QBO.

COST OF SERVICES (COST OF GOODS SOLD)

ON-SITE INTERPRETING	Interpreting cost:OSI cost	?
OPI INTERPRETING	Interpreting cost:OPI cost	?
VRI INTERPRETING	Interpreting cost:VRI cost	?
TRAVEL TIME	Interpreting cost:Travel time cost	?
MILEAGE	Interpreting cost:Miles cost	?
PARKING	Interpreting cost:Parking cost	?
FEES	Interpreting cost:Fees cost	?
TOLLS	Interpreting cost:Tolls cost	?
PER DIEM	Interpreting cost:Per diem cost	?
ADJUSTMENT	Interpreting cost:Adjustments cost	?

Revision #15

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