# QBO CHECKLIST

Use the following checklist to ensure all items are addressed during integration of ScheduleInterpreter® and Intuit QuickBooks Online.

| Task | Completed |
|---|---|
| Backup your account. VERY IMPORTANT | ☐ |
| Review Before you begin using ScheduleInterpreter® with QBO | ☐ |
| Switch to Advanced subscription | ☐ |
| Configure Track classes | ☐ |
| Review Best practices | ☐ |
| Configure Chart of accounts | ☐ |
| Configure Items | ☐ |
| Configure Account types in QBO | ☐ |
| Review QBO limitations | ☐ |
| Check Account duplicates | ☐ |
| Connect ScheduleInterpreter® and QuickBooks Online | ☐ |
| Configure Global settings | ☐ |
| Configure COA and items | ☐ |
| Synchronize Customers' accounts | ☐ |
| Synchronize Vendors' profiles | ☐ |
| Synchronize Vendors' bills | ☐ |
| Synchronize Customers' invoices | ☐ |

Print or use screen capture to create an electronic copy of the check list.  Make sure to check off all tasks.

The process of integration between ScheduleInterpreter® and QBO has been reviewed by QuickBooks Online expert and ScheduleInterpreter® staff.  It is highly effective, low maintenance process making your operational and financial data from ScheduleInterpreter® platform be fully integrated with Intuit QuickBooks Online.