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.

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