

# 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. <b>VERY IMPORTANT</b>	<input type="checkbox"/>
Review Before you begin using ScheduleInterpreter® with QBO	<input type="checkbox"/>
Switch to Advanced subscription	<input type="checkbox"/>
Configure Track classes	<input type="checkbox"/>
Review Best practices	<input type="checkbox"/>
Configure Chart of accounts	<input type="checkbox"/>
Configure Items	<input type="checkbox"/>
Configure Account types in QBO	<input type="checkbox"/>
Review QBO limitations	<input type="checkbox"/>
Check Account duplicates	<input type="checkbox"/>
Connect ScheduleInterpreter® and QuickBooks Online	<input type="checkbox"/>
Configure Global settings	<input type="checkbox"/>
Configure COA and items	<input type="checkbox"/>
Synchronize Customers' accounts	<input type="checkbox"/>
Synchronize Vendors' profiles	<input type="checkbox"/>
Synchronize Vendors' bills	<input type="checkbox"/>
Synchronize Customers' invoices	<input type="checkbox"/>

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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🔄Revision #5

★Created Fri, May 21, 2021 1:28 AM by Dennis Ayzin

✎Updated Wed, Feb 2, 2022 10:10 PM by Dennis Ayzin