Kaseya® BMS™ and QuickBooks Online

Integration Guide

Version 4.0.6
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Connecting to Quickbooks

You must have an credentials to an Intuit Quickbooks online account to complete this procedure.

1. Login to Kaseya® BMS™.
2. Select the Finance > QuickBooks Sync page.
3. Click Connect to QuickBooks.
4. Enter your Intuit Quickbooks online credentials in the Intuit Sign in dialog.
5. Click Authorize to securely share your data in Quickbooks with your instance of Kaseya® BMS™.
6. Verify a green connection status indicator shows Connected.
7. Notice four additional tabs at the top of the dialog. In the following procedures you will configure data synchronization for each of these four areas.
   - Accounts (page 2)
   - Chart of Accounts (page 3)
   - Items (page 4)
   - Invoices (page 4)
   - Payments (page 5)
Syncing Accounts

This procedure configures the synchronization of customer data between Quickbooks and Kaseya® BMS™.

1. Click the Accounts tab in the Quick Books Sync dialog.

2. Select the customer records to send to Quickbook.

3. Click Load Customers from Kaseya® BMS™.

4. Click Send Selected to QuickBooks.
   - A highlighted message displays in the Synchronization Logs.

5. Login to QuickBooks Online.

6. Select Customers.
7. Use search to verify your Kaseya® BMS™ client records have been successfully added to Quickbooks.

Syncing Chart of Accounts

This procedure configures the synchronization of chart of account data between Quickbooks and Kaseya® BMS™.

1. Click the Chart of Accounts tab in the Intuit Quickbooks dialog.

2. Select the accounts to send to Quickbook.
3. Click Load Chart of Accounts from Kaseya® BMS™.
4. Click Send Selected to QuickBooks.
   ➢ A highlighted message displays in the Synchronization Logs.
5. Login to QuickBooks Online.

7. Verify your Kaseya® BMS™ chart of account records have been successfully added to Quickbooks.
Syncing Items

This procedure configures the synchronization of item data between Quickbooks and Kaseya® BMS™.

1. Click the Items tab in the Intuit Quickbooks dialog.

2. Select the items to send to Quickbooks.
3. Click Load Items from Kaseya® BMS™.
4. Click Send Selected to QuickBooks.
   ➢ A highlighted message displays in the Synchronization Logs.

Syncing Invoices

This procedure configures the synchronization of invoice data between Quickbooks and Kaseya® BMS™.

Note: Only after an invoice has been successfully generated and its status set to Ready to Send, Sent, Partially Paid, or Fully Paid can you open the invoice in QuickBooks.

1. Click the Invoices tab in the Intuit Quickbooks dialog.

2. Select the invoices to send to Quickbooks.
3. Click Export selected Invoices to QuickBooks.
   ➢ A highlighted message displays.
4. Login to QuickBooks Online.

5. Select Transactions.
6. Click Sales.
7. Verify your Kaseya BMS™ invoices have been successfully added to Quickbooks.

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Syncing Payments

This procedure configures the synchronization of payment data between Quickbooks and Kaseya® BMS™.

1. Click the Payments tab in the Intuit Quickbooks dialog.

2. On the Synchronization Options tab set the range of payment records to import into BMS from your QuickBooks Online account. By default only payments dated a month backward will be loaded.
3. Click Payments to Import.
4. Select the individual invoices to import.
5. Click Next.
6. Review the list of imported payments on the Synchronization Results tab.
## Sync Map

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<th>QuickBooks Fields</th>
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<td>Tax Rate</td>
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