SalesVu – QuickBooks Desktop Integration

SalesVu - QuickBooks Integration Overview

As a value-added feature for SalesVu customers, our team has integrated with the popular small-tomedium business accounting software QuickBooks. This feature is intended to simplify the management of bookkeeping, accounting, and finance for SalesVu merchants by syncing select SalesVu data directly into QuickBooks. Our team at SalesVu constantly strives to improve operational efficiency and simplify business management for our valued customers.

What versions of QuickBooks sync with SalesVu?

SalesVu has integrated with QuickBooks Online and all versions of QuickBooks Desktop for Windows. Please refer to specific sync recommendations regarding your version of QuickBooks.

QuickBooks Versions Supported

- ✓ QuickBooks Online
    - Simple Start
    - Essentials
    - Plus
- ✓ QuickBooks Desktop for Windows
    - Pro
    - Premier
    - Enterprise
    - Accountant

Note: SalesVu does not sync with QuickBooks for Macintosh. Features may vary by QuickBooks version.

What information does SalesVu sync with QuickBooks?

SalesVu transfers data to QuickBooks each time a manual sync is performed. Data is not transferred from QuickBooks into SalesVu.

SalesVu transfers the following types of data to QuickBooks:

- Categories & Products
- Closed Transactions
- Customer Contact Information
- Employee Contact Information
- Vendor Contact Information (Online only)

Note: Purchase Order and Inventory Data do not transfer to QuickBooks

How do I establish a connection to sync data from SalesVu to QuickBooks?

SalesVu has separate setup instructions to connect with QuickBooks which differs for the Online and the Desktop Windows versions. Refer to the below instructions based on your version of QuickBooks.

Prior to establishing an initial sync to QuickBooks please backup all information as a precautionary measure.

QuickBooks Desktop Sync Instructions

There are four main steps which need to be performed to complete SalesVu integration and sync with QuickBooks Desktop:

A. SalesVu QuickBooks Desktop Setup
B. QuickBooks Existing Company Preferences Setup
- **QuickBooks New Company Setup (if necessary)**

C. Configure QuickBooks Web Connector
D. Perform Data Syncs through QuickBooks

A. Initial SalesVu QuickBooks Desktop Setup

1) Login to QuickBooks Desktop (please ensure QuickBooks Desktop is installed)
2) Login to SalesVu via your web browser (sync is not performed through the App)
3) Once logged in to SalesVu, select 'Accounting' Tab
4) Click on QuickBooks Integration button
5) Select your Location (if multi-locations are used)
6) Select QuickBooks Desktop option
7) After selecting the Desktop option you will see an interface from where you will download or copy the following:
    a. QuickBooks Web Connector (.qwc) file,
    b. User name
    c. Password

The above three items are required to connect your QuickBooks Desktop application to SalesVu.

B. QuickBooks Preferences Setup (for existing accounts)

8) Review Important "Notes for QuickBooks Desktop" in Red Text on SalesVu QuickBooks Integration page
9) Return to QuickBooks Desktop and Check Preferences with the Configuration Notes
    a. Edit > Preferences
        i. Items & Inventory
            1. Company Preferences Tab
                a. Enable Unit of Measure (if available)
                b. Follow Instructions listed in as # 2 in Red Text on SalesVu QB Desktop integration screen
        ii. Payments
            1. Company Preferences Tab
                a. Under Invoice Payments section
                b. Select "Bank Account of Credit Card"
        iii. Sales Tax
            1. Company Preferences Tab
                a. Select Yes in "Do you charge sales tax"

QuickBooks New Company Setup (if necessary)

10) Open QuickBooks to the Company File for your business
    a. SalesVu recommends starting with a Blank Company File for ease of use and quick setup
        i. Open QuickBooks
            1. Go to File > New Company (takes you to Get Started Guide) ii.
        You can either Start or Skip the Interview
            1. Start Interview directs you through the EasyStep Interview
                a. Follow interview steps
            2. Skip Interview directs you to the Create New Company Window
                a. Choose your Company
                b. Save your New Company File
                c. Click Begin Using QuickBooks

Now your Company File has been created for use with the QuickBooks Web Connector. Follow Configuration instructions for existing QuickBooks accounts above to set preferences in QuickBooks prior to sync.

C. Configure QuickBooks Web Connector

11) Open QuickBooks and select the Company File that you would like to use (if not open)
12) Open the QuickBooks Web Connector (.qwc) by Clicking File > Update Web Services
    a. Click Add Application
    b. Locate the QWC File
        i. Click Continue (SalesVu App should now be listed on the Web Connector)
    c. Locate the Password Field within the Web Connector
        i. Enter the Password provided by SalesVu cloud management portal
    d. Click Update Selected

Application Progress and Total Progress completion bars should initiate the sync

D. Perform Data Syncs through QuickBooks Desktop

13) Perform Syncs through QuickBooks Desktop
    a. Manual sync - Once in the Web Connector is connected Click Update Selected

    b. Automatic sync – Can be set within the Web Connector under Auto-Run

Notes on Connection Process

1st Sync - Initial Import Sync

- Only occurs on the 1st Sync
- Categories and Products are Imported to corresponding QuickBooks Income accounts

2nd Sync - Subsequent Syncs and Export of Data

- Closed transactions, Customer and Employee Contact Info will exported to QuickBooks