

QuickBooks: Step 6: Ensure that all of your accounts have the QB Profile Setting set to Company QB Settings

Integration Checklist

1. Map the CoA in Fuse5 using the appropriate CoA mentioned by each line item and the exact NAME from Quick Books.
 - a. Ensure that EOD Memo types have been mapped in Fuse5 and are created in your QB.
 - b. Ensure that the Discrepancies have been mapped in the VIR section and exist in your QB.
2. Create sub accounts and map to Fuse5 if you have more than one location and want to track P&L separately.
3. Ensure Dummy Customer Account is set up under EOD Reconciliation section and exists in your QB – this is one of the most common issues with the integration.
4. Create the “items” in Quick Books
5. Create Invoice and Credit Memo Template.
- 6. Ensure that all of your accounts have the QB Profile Setting set to Company QB Settings.**
7. Create a copy of your QB and hook up the web connector.
8. Once comfortable with data flow to your copy of QB, hook up web connector to your live QB.

6. Ensure that all of your accounts have the QB Profile Setting set to Company QB Settings.

In general this is not something you will need to make any changes to, but in the event that someone has made changes you will want to double check. In Fuse5 go to SALES MANAGMENT > ACCOUNTS. Do a search similar to the one below: (QB Profile Setting....is not....Company QB Settings)

Accounts

Search

Go to Basic Search

☒ Match All of the Following

☐ Match Any of the Following

[x]

QB Profile Setting

is not

Company QB Settings

More

Fewer

Search Now

Delete

Send Mail

Mailer Export

Showing 1 - 1 of 1

Show per page: 20

Filters : Pricing

New

Account Number	Account Name	Sell Price	List Price	Account Exceptions	Sales and Promotions	Default Price	Action
TEX01	TEXAS TECHNICIAN LUBE	Garages				M3	

If you have any accounts that are blank or have something other than Company QB Settings you will want to either edit them individually, or export the accounts out, enter Company QB Settings for all of them, and import back into Fuse5.

SO General Comment Display Until	--
Add Shop Parts	No
Add misc SO Fee	
QB Profile Setting	Company QB Settings
Default SO Shop or Parts	Parts
ADN NATIONAL ACCOUNT ID	
ADN NATIONAL ACCOUNT STORE ID	
ADN MASTER MEMBER NUMBER	