

# Activating the Quickbooks Connector

The activation of the integration connector can be done from BSS Setup. For creating a new Quickbooks instance you must navigate to **BSS > Setup > System Options > Systems Setup** and select the **Activate** action for the **Quickbooks** connector. You will be asked to set a unique name for the new instance that will be created.

	Integration System	
	Build your own connector	<input type="button" value="Activate"/>
	ConnectWise	<input type="button" value="Activate"/>
	MS Dynamics NAV	<input type="button" value="Activate"/>
	NetSuite	<input type="button" value="Activate"/>
	Quickbooks	<input type="button" value="Activate"/>
	Zendesk	<input type="button" value="Activate"/>

You will then be redirected to the **"Edit Integration"** page of the new instance where you must press **Save** for the creation to be completed.

Setup > Administration > System Options > Integration System Register

Integration Systems

Save Save & Close Cancel Unregister

System Details

Quickbooks

Definition

```
Tree
Select a node ...
object {7}
  openapi : 3.0.0
  info {3}
```

The new instance is now available in the list of **"Enabled Connectors"**. From this section, by selecting **"Settings"** you can configure your instance.

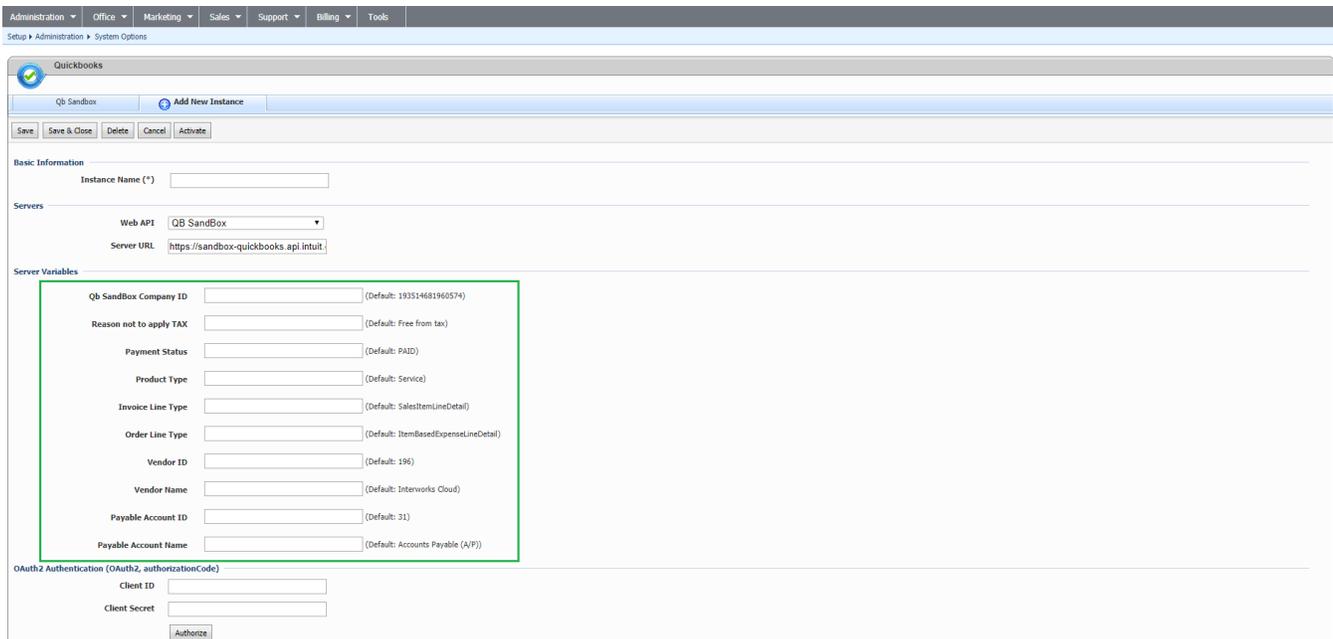
	NetSuite	<a href="#">Activate</a>
	Quickbooks	<a href="#">Activate</a>
	Zendesk	<a href="#">Activate</a>

### Enabled Connectors

Integration System		
	MS Dynamics NAV Staging	<a href="#">Settings</a> <a href="#">Edit integration</a> <a href="#">Copy</a>
	Quickbooks	<a href="#">Settings</a> <a href="#">Edit integration</a> <a href="#">Copy</a>

## Defining your Installation URL and the Server Variables

You enter a meaningful name for the instance and then select "Quickbooks Sandbox" or "Quickbooks Production" from the Web API drop-down list. Then enter your installation's **Company ID** and the **Server Variables**



Administration > Office > Marketing > Sales > Support > Billing > Tools

Setup > Administration > System Options

Quickbooks

Qb Sandbox [Add New Instance](#)

[Save](#) [Save & Close](#) [Delete](#) [Cancel](#) [Activate](#)

**Basic Information**

Instance Name (\*)

**Servers**

Web API:

Server URL:

**Server Variables**

Qb Sandbox Company ID  (Default: 193514681960574)

Reason not to apply TAX  (Default: Free from tax)

Payment Status  (Default: PAID)

Product Type  (Default: Service)

Invoice Line Type  (Default: SalesItemLineDetail)

Order Line Type  (Default: ItemBasedExpenseLineDetail)

Vendor ID  (Default: 196)

Vendor Name  (Default: Interworks Cloud)

Payable Account ID  (Default: 31)

Payable Account Name  (Default: Accounts Payable (A/P))

**OAuth2 Authentication (OAuth2, authorizationCode)**

Client ID

Client Secret

[Authorize](#)

Some variables from Quickbooks cannot be mapped and therefore server variables must be used for this scope. The needed values are already defined in the installation but they should be overridden with correct values by using the provided text boxes. Below chapters include all defined variables along with an explanation and example for each one.

Server Variable	Used for	Explanation
CompanyID	Authentication, Synchronization	The company ID from sandbox or production instance. <i>Format will be like "193514681960574"</i>
Reason not to apply TAX	Customer	A simple reason on why Account will not be taxable. Used only when Customer on Qb will be set as non taxable
Payment Status	Payment	Default value for Payments (Quickbooks always set to PAID for payment transactions)
Product Type	Product	Default type of product.

Invoice Line Type	Invoice	Default type of Invoice Item.
Order Line Type	Order	Default type of Order Item.
Vendor ID	Order	ID of the vendor that will be used for Orders imported from BSS
Vendor Name	Order	Name of the vendor that will be used for Orders imported from BSS
Payable Account ID	Order	ID of the "Account Payable" account that will be used for Orders imported from BSS
Payable Account Name	Order	Name of the "Account Payable" account that will be used for Orders imported from BSS

## Authentication

A valid Client ID and Client Secret must be set in the corresponding textbox in order for BSS to be able to authenticate itself with Quickbooks.

**OAuth2 Authentication (OAuth2, authorizationCode)**

Client ID

Client Secret

Once all variables are set for the new Instance, **Authorize** button must be used in order for Quickbooks to ask user's permission to grant access to BSS

## Synchronization Options

This table presents all available operations for the supported entities. In order to be able to sync an entity, the corresponding action must be checked.

### Synchronization Options

	Push			Pull	
	Create	Update	Delete	Create	Update
<b>Accounts</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Contacts</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<b>Payments</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Products</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<b>Invoices</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<b>Orders</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

Check Supported Push and Pull Methods for more details

# Synchronization Lookups

Lookups enable the mapping between entities that cannot be synced with the Integration Framework. For each of these entities, a table is available with all the available values in BSS. To map any of these entities and values the relevant value from the QuickBooks entity must be set, in order to be used during synchronization.

For the QuickBooks connector the following lookups must be set up:

	Push	Pull
Account	Account Type Quick Books Account Type Enum [Other Asset, Non-Posting, Fixed Asset, Equity, Accounts Payable, Income, Cost of Goods Sold, Accounts Receivable, Credit Card, Expense, Other Current Asset, Bank, Long Term Liability, Other Expense, Other Current Liability, Other Income]	-
Contact	-	-
Product	-	-
Invoice	-	-
Invoice Items	-	-
Orders	-	-
Order Items	-	-
Payments	-	-
Currency	-	-

Below is an example of Payment Type lookup between BSS and QuickBooks

Synchronization Lookups				
	Internal Name	Internal ID	eConsortium Quickbooks ID	
<b>Account Type</b>				-
	Partner	470	Income	
	Customer	471	Accounts Payable	
	Competitor	472	Other Income	
	Prospect	473	Other Income	
<b>Account Source</b>				+
<b>Account Industry</b>				+
<b>Order Stage</b>				+
<b>Order Type</b>				+
<b>Payment Type</b>				+
<b>Payment Method</b>				+
<b>Invoice Stage</b>				+
<b>Invoice Type</b>				+
<b>Unit Group</b>				+
<b>Unit Type</b>				+
<b>Subscription Units</b>				+
<b>Lease Stages</b>				+
<b>Lease Types</b>				+
<b>Product Type</b>				+
<b>Currency</b>				+
<b>Case Stage</b>				+
<b>Case Folder</b>				+
<b>Case Type</b>				+
<b>Case Priority</b>				+