

ESP+

Product Support > Quotes, Orders & Invoices > QuickBooks Integration

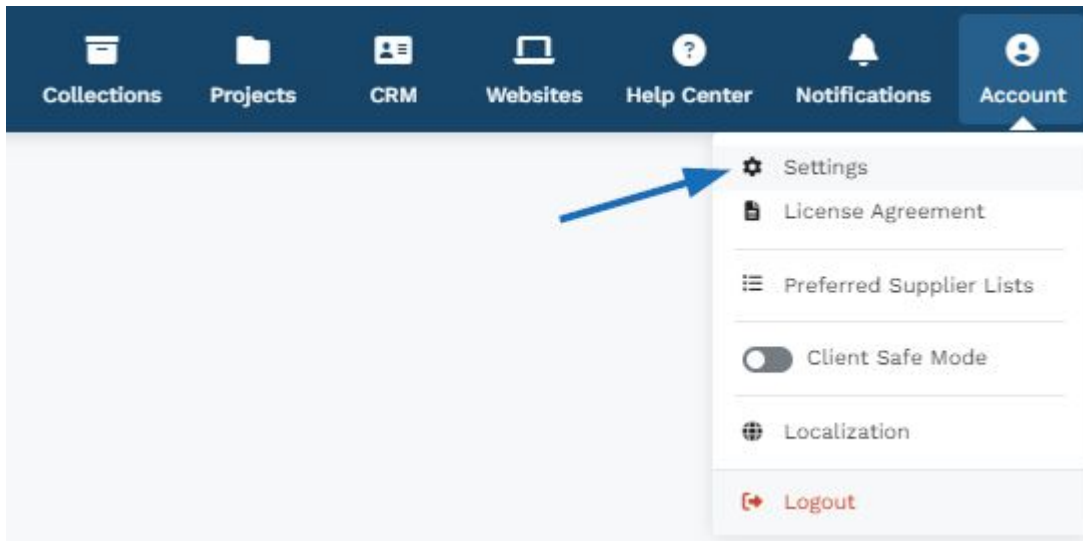
QuickBooks Integration

Jennifer M - 2024-06-19 - Quotes, Orders & Invoices

With the ESP+ QuickBooks Online Integration, you're able to easily create transactions between your billing, invoice, and purchase order data to your ESP+ CRM.

Establish Integration

After logging into ESP+, click on Account from the main toolbar and select Settings.



From the options on the left, click on Account Integrations from the Integrations Admin section.

Basic Settings

- Profile and Login Settings
- Notification Settings

Company Settings

- Company Information
- Manage Users


Integrations Admin

- Accounting Integrations**
- Payment Providers
- Supplier Credentials

ESP+ can integrate with Intuit® QuickBooks Online and/or ASI SmartBooks.

Accounting integrations

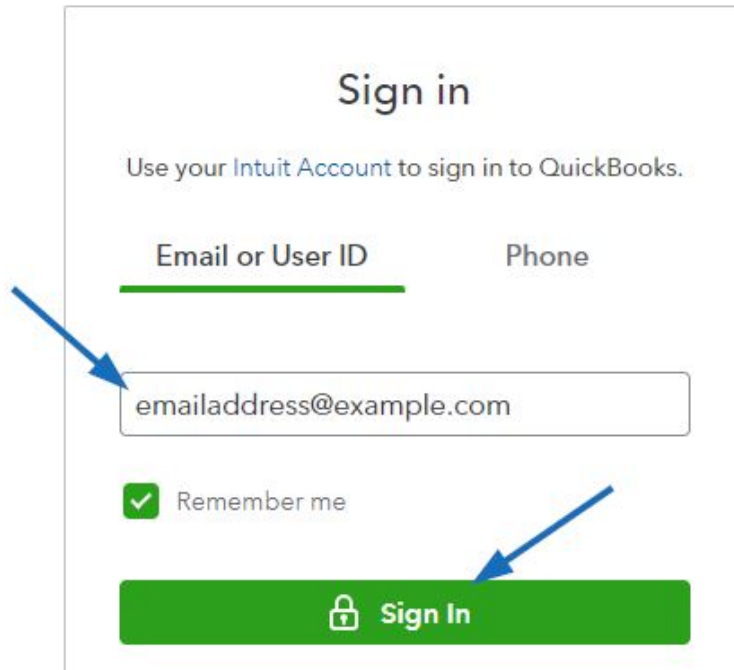
Connect all your financial business data into ESP+ using our Accounting Integrations.

	Intuit QuickBooks Online With the ESP+ Quickbooks Online Integration, you're able to easily create transactions between your billing, invoice, and purchase order data to your ESP+ CRM.	Connect
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A window will open where you can sign into your QuickBooks account.

INTUIT

 turbotax  credit karma  quickbooks




Sign in

Use your Intuit Account to sign in to QuickBooks.

Email or User ID Phone

Remember me

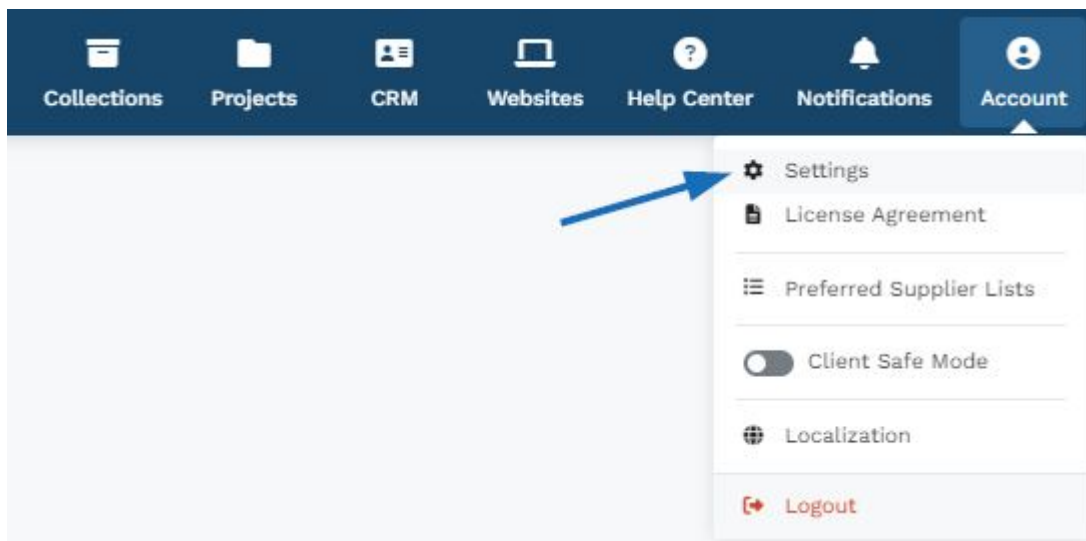


The image shows a sign-in form for QuickBooks. At the top, the Intuit logo is displayed. Below it are three logos: turbotax, credit karma, and quickbooks. The main heading is "Sign in". Below the heading is the instruction "Use your Intuit Account to sign in to QuickBooks." There are two input fields: "Email or User ID" and "Phone". The "Email or User ID" field contains the text "emailaddress@example.com". Below the input fields is a checkbox labeled "Remember me" which is checked. At the bottom of the form is a green button with a lock icon and the text "Sign In". Two blue arrows point to the "Email or User ID" input field and the "Sign In" button.

Your QuickBooks Online account will now be connected to ESP+.

Configure Integration Information

After logging into ESP+, click on Account from the main toolbar and select Settings.



From the options on the left, click on Account Integrations from the Integrations Admin section.

Basic Settings

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 **Accounting Integrations**

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Account Information

After integration is complete, the Intuit QuickBooks Online will display with an option to Disconnect and Account Integration information.



Intuit QuickBooks Online

With the ESP+ Quickbooks Online Integration, you're able to easily create transactions between your billing, invoice, and purchase order data to your ESP+ CRM.



Disconnect




Account Information

Product Name:	QuickBooks Online
Company Name:	ASI Distributor Company
Last Updated Date:	04/06/2024
Last Updated By:	ESP+ User
Expiration Date:	09/27/2024

Permissions

In the Permissions section, select the level of visibility using the Edit link.

Permissions

Make Integration Visible To 

Anyone within your company can send to QuickBooks

Make Transaction Details Visible To 

 Edit

Select whether to make the QuickBooks Integration and transaction details visible to all users within your company or select specific individuals.

You can also use the checkboxes to select which documents can be sent by users.

When you are finished, click on Save.

Permissions

Make Integration Visible To ⓘ

Everyone within your company

Selected individuals

Make Transaction Details Visible To ⓘ

Everyone within your company

Selected individuals

Allow Users to Send ⓘ

Purchase Orders

Bills

Invoices

× Cancel **Save**

QuickBooks Accounts and Settings

In this section, select the options for the integrated account. The first slider, "Set Customer as Billable When Sending Bills or Purchase Orders" enables you to display a Billable Expense Column in QuickBooks Online that can be invoiced to the Customer on the Bill or Purchase Order. If you plan on sending the Invoice to QuickBooks then this selection needs to be set to off.

The next option, "Map the QuickBooks Item Name Field To" is where you can choose whether the Product Number or Product Name will be referenced as the QuickBooks Product Service Name value when sending a purchase order, bill, or invoice.

Use the dropdowns to map specific fields to your fields in QuickBooks.

When you are finished, click on the Save button.

QuickBooks Accounts and Settings

Set Customer as Billable When Sending Bills or Purchase Orders ⓘ

Map the QuickBooks Item Name Field To ⓘ

- Product Number
 Product Name

QuickBooks Accounts ⓘ

Accounts Payable

Accounts Payable ▾

Cost Of Goods Sold

Cost Of Goods Sold ▾

Accounts Receivable

Accounts Receivable ▾

Income Accounts

Uncategorized Income ▾

× Cancel

 Save

Link ESP+ Companies to QuickBooks

This section enables you to link the companies within your ESP+ CRM to your QuickBooks Online account.

Click on the Edit link for the member type.

Link ESP+ Companies to QuickBooks

Customers

[Edit](#)

Suppliers

[Edit](#)


Decorators

[Edit](#)

Locate the company in ESP+ and then use the available field to link to the customer in QuickBooks.

QuickBooks Customer Linking

Link your customer below.

ESP+ Customers (1)	QuickBooks Customers
 Example Customer Company	<input type="text" value="Example Customer Company"/>

[X Cancel](#) [Save](#) [Close](#)

When you are finished, click on Save.