

## How To: Integrate QuickBooks with Coolfront

*Do you use QuickBooks for your accounting needs? With Coolfront's sync tool, you can move Coolfront work orders to your QuickBooks software automatically – with no dual entry.*

### Before downloading the sync tool:

- In QuickBooks, make sure you are signed in as the Admin, and not just with Admin privileges
- In QuickBooks, you must be in Single User mode
- Use Google Chrome as the preferred browser
- You can only sync to one machine

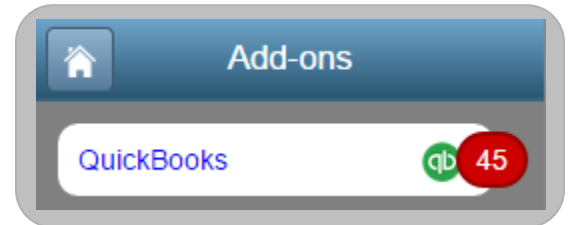
### Let's get started with downloading the sync tool:

1. In the left navigation pane, select the **Add-ons** link
2. Select **QuickBooks**
3. Select the **Download Sync Tool** button
4. A pop-up error message will appear, select **Run**
5. The user will now be prompted for a QuickBooks certificate. Select the **Yes, always: allow access even if QuickBooks is not running** option.
6. If there is more than one user on the QuickBooks account, select **Yes** and a drop down will allow the user to include another user. The sync tool will now download.

**Coolfront Tip:** If you are prompted to update your software upon QuickBooks startup, please run the update in order for the sync tool to perform.

## Using the sync tool:

1. When running the initial sync, it's a good idea to run it at the end of the day. *The sync will take approximately 1.5 hours for every 1,000 customers.*
2. After the initial sync is complete, you now can now activate invoice syncing
3. For a Coolfront invoice to sync with QuickBooks, it must be marked as **Completed** or **Paid**
4. On the tab, you will now see a red circle with a number inside indicating that you have a decision to make. Click on the tab and you will see the Customer, Invoice, or both. Select **Yes** to queue it to the next sync.
5. There are two types of syncs: Auto and Manual. To run a Manual sync, click on the **blue sync tool**. This will copy the invoices over to QuickBooks immediately. You can also wait for the Auto Sync which runs at approximately 11:30 a.m. daily.
6. To change the Auto Sync time, access the Task Scheduler through your PC's control panel by following this path: Control panel>Administrative Tools>Task Scheduler>Task Scheduler Library. Select **Sync QuickBooks**. Here you can also set a machine to sync whether or not a particular user is logged into the machine (though the user must still be logged into QuickBooks).



## What gets synced?

Each invoice Coolfront creates in QuickBooks will include line items for repair descriptions and pricing, service call fees, diagnostic fees, agreement sales, discounts applied, and sales tax. Items are mapped to Coolfront Income and Liability accounts so you can easily run QuickBooks reports to access synced data.

Customer profiles will be automatically saved and the Coolfront's convenient auto-fill feature will pre-populate when you begin to type.