# QUICKBOOKS SYNCING SETUP GUIDE

#### Overview

Enabling the QuickBooks sync will allow you to keep your QuickBooks company file up to date with the latest changes performed in AdvancePro, eliminating the need for double-entry. If you are setting up a new AdvancePro company and have existing data in QuickBooks, you can also perform a one-time import of customers, vendors and products from QuickBooks.

With the exception of the initial import and payment status on invoices, the sync is one-way from AdvancePro to QuickBooks. All new transactions, inventory adjustments, and changes to customers, vendors and products must be performed directly in AdvancePro. The changes will be reflected in QuickBooks after syncing.

#### Information that syncs from AdvancePro to QuickBooks (when records are created or updated):

- Customers
- Vendors
- Products
- Transactions (bills, invoices, credit memos)
- Inventory adjustments
- Work orders
- Currencies
- Payment terms
- Payment methods
- Taxes
- Carriers (shipping methods)
- Changes to accounts and sub-item settings for products

#### Information that syncs from QuickBooks to AdvancePro (one time only):

- Customers
- Vendors
- Products
- Assembly items
- Sales reps
- Shipping methods
- Payment terms
- Payment methods
- Currencies

#### Information that does NOT sync from QuickBooks to AdvancePro:

- Transactions
- Price levels
- Account settings for products
- Advanced Inventory details (serial numbers, sites, etc.)
- Other details not applicable to AdvancePro

Note: most details that do not automatically sync from QuickBooks can be imported via spreadsheet.

#### **Important Steps Before Proceeding**

It is recommended that separate copies of your QuickBooks and AdvancePro companies are created for testing. This will allow you to configure and test the integration without affecting any live data. If you are enabling the sync for the first time on live company files, backup your AdvancePro and QuickBooks company files before proceeding.

### **Configuring Initial QuickBooks Export Options**

1. Go to 'Admin' > 'Site Settings':

Advance Pro My Workspace	Admin Customers	Vendors Products Warehouse	e Returns Reports Sale	s Reps QuickBooks Web	MFG	3
Customers New Order POS View Orders View Customers Add Customer			Admin			
A Vendors			Admin			
New Order View Orders View Vendors						
Products		Site Configuration	Payment Settings	Other		
Add Product Manage Inventory View Products		Site Settings	Currencies	Product Unit Management		
Q Quick Search		Site Administrators	Payment Terms	Carriers		
Q		Roles	Payment Method	Utilities		
View All Customers QB Export Report			Тах			
Log Out		© 2'	016, AdvancePro Technologies. All rights r	eserved.		

2. Click on the 'QuickBooks' tab and ensure the following options are configured:

- Enable the "Are you a QuickBooks user" option, if it is not already enabled.
- Ensure the correct type and version are selected on the right side.

# **IMPORTANT:** You cannot change the type or version of QuickBooks after saving the initial selection. You will be prompted to clear the AdvancePro database if you change either setting afterwards!

	S	ite Settings					
Company Informat	ion General Settings	Additional Setting	Printing Setti	ngs Site Wide Settings			
My Work Space	Additional Favorite Link	s QuickBooks	Custom Fields	Custom Fields 2 UOM Settings			
Email Setting		· · · · · ·	2				
Use the Quick Book	ro to recognize if you a Books module for your a QuickBooks user? ble QuickBooks Import QuickBooks Classes want AdvancePro to Qi want to Export only Act sion of QuickBooks dor Customer Account Nur tically adjust QB Inven Tracking Number to QB	synchronization a (B) (C) (C) (C) (C) (C) (C) (C) (C	ettings and exp fersion type of DuickBooks esktop C Onli version of DuickBooks SA C Canadi in QuickBooks (Books? em Assemblies tomer Name	a are you using? ne oks are you using? an C Australian C UK C Others ? ? ? ? ?			
	This option will reset all previously exported data in the AdvancePro database for Re-Export to QuickBooks.						
Re-Export	ALL to QuickBooks	Re-Export Default Items		Re-Link All Failed Exports			
WARNING:	WARNING: Re-Exporting all data to an existing QuickBooks company file will result in duplicate records in QuickBooks.						
Mark all Pro	ducts for QB Re-Export	Mark all Products	as Exportable	Mark all Products as NOT Exportable			
Mark All Cust	omers for QB Re-Export	Mark All Customer	s as Exportable	Mark All Customers as NOT Exportable			
Mark All Ver	ndors for QB Re-Export	Mark All Vendors	as Exportable	Mark All Vendors as NOT Exportable			
Mark All Inve	entory for QB Re-Export	Mark All Sales Rep	as Exportable	Mark All Inventory as already Exported			
			Save &	Close Save & Next Close			

3. Configure the remaining options as desired:

- **Re-Enable QuickBooks Import** This allows users to import new records from QuickBooks. Once you have completed the initial import, disable this setting to ensure no one accidentally performs another import (which could result in duplicate records).
- Enable QuickBooks Classes This allows you to import your class list from QuickBooks and assign those classes to invoices and bills in AdvancePro. When the transactions export to QuickBooks, they will be assigned to the those classes.
- Do you want AdvancePro to Query your Invoices in QuickBooks? This allows payment status from QuickBooks to sync back to AdvancePro. Once an invoice has been paid in full in QuickBooks, and a sync has been performed, the paid status will show on the invoice when viewed in AdvancePro.
- Do you want to Export only Active Items to QuickBooks? This prevents products from exporting to QuickBooks until they have been used on a transaction. (It is advisable to leave disabled in most cases.)
- My Version of QuickBooks does NOT support Item Assemblies This causes item kits in AdvancePro to export to QuickBooks as non-inventory items. Enable this option if you are using QuickBooks Pro or an older version that does not support assembly items.
- Export Customer Account Number to QB as Customer Name This will remap the account number field in AdvancePro to the customer name in QuickBooks. Leave disabled unless you require this behaviour.
- Automatically adjust QB Inventory when manual Adjustments are made in AdvancePro This controls how onhand quantities for products are updated in QuickBooks. Leave enabled if you want AdvancePro to compare inventory and adjust QuickBooks on hand quantities up and down as necessary (the recommended option). Disable if you want each individual adjustment performed in AdvancePro to export to QuickBooks.
- Export Tracking Number to QB This allows tracking numbers entered in AdvancePro to export to QuickBooks (the tracking number will show as the last line item on the invoice).

#### Selecting the QuickBooks Company File to Sync With

1. Go to 'QuickBooks' > 'Settings':

Customers				101	
New Order					
POS		QuistDest	le est		
View Orders		(d) QuickBoo	KS		
View Customers					
Add Customer	Last expo	rt performed by:		-	
Vendors		Date: 11/28/2016 2:37:00 PM	Export t	:0 <b>(D)</b>	
New Order	alle	Items To Export	Pending	Qty	
View Orders	48	Customers	Circuit	2	
View Vendors	Settings	Vendors		0	
Products		Products		0	
Add Product		Service Items		0	
Manage Inventory	EO	Sales Reps		0	
View Products	Reports	Carriers		0	
Quick Search		Payment Terms		0	
Select item		Payment Methods		0	
		Currencies		0	
C.		Tax Items		0	
Open Windows		Invoices (Shipped Customer Invoices)	0	0	
		Payments Received		0	
		Credit Memos (Received Customer RMA's)		0	
		Bills (Received Vendor Orders)	0	0	
		Vendor Credit Memos (Shipped Vendor RMA's)	0	0	
		Promotion Codes		0	
		Assembly Build	0	0	
		Export Progress:			

## 2. On the 'Set Up' tab, click 'Browse'

QuickBooks Settings	- 🗆 🗙
Set Up Import   Export   Categories   Auto Export	
In order to use the QB Synchronization tool you need to first select your company file. Please make is running and the selected company file is open.	e sure QuickBooks
Select Your Company File	
Company file	
Company file	Browse Apply
	Gpen QB File
	Next Close

3. Navigate to the QuickBooks company file, select it and click 'Open'

Note: the default company file location is C:\Users\Public\Public Documents\Intuit\QuickBooks\Company Files\.

		Open				×
€ ∋ - ↑ 🎚	« Comp	oany Files → GreatGift →	v ¢	Search GreatG	ift	,o
Organize 🔻 Ne	w folder				III - III	0
🔆 Favorites	^	Name	Dat	e modified	Туре	
E Desktop		퉬 GreatGift US.qbw.SearchIndex	11/2	28/2016 3:01 PM	File folder	
🗼 Downloads		퉬 QuickBooksAutoDataRecovery	11/2	28/2016 4:01 AM	File folder	
🔒 Google Drive		ᡖ GreatGift US.qbw	11/2	28/2016 3:56 PM	QuickBooks Co	m
🍌 GreatGift						
Recent places						
🤣 Homegroup						
💻 This PC						
📔 Desktop						
Documents						
🚶 Downloads						
🚺 Music						
🖹 Pictures						
🛃 Videos	~ <					>
	File name	e: GreatGift US.qbw	Ŷ	QuickBooks F Open	iles (*.QBW,*.QB/	• •

4. Temporarily close the QuickBooks company file if it is currently open, then click 'Apply' and 'Open QB File'

Set Up       Import       Export       Categories       Auto Export         In order to use the QB Synchronization tool you need to first select your company file. Please make sure QuickBooks       Select Your Company File         Company file       C:\Users\Public\Documents\Intul\QuickBooks\Company Files\GreatGift\GreatGift US.qbw         Browse       Apply         Import       Qpen QB File         Open QB File       Next	QuickBooks Settings – 🗆 🗙					
s running and the selected company file is open.           Select Your Company File           Company file         C:\Users\Public\Documents\Intuit\QuickBooks\Company Files\GreatGift\GreatGift US.qbw           Browse         Apply           Image: Company file         C:\Users\Public\Documents\Intuit\QuickBooks\Company Files\GreatGift\G	Set Up Import Export Categories Auto Export					
Company file C:\Users\Public\Documents\Intuit\QuickBooks\Company Files\GreatGift\GreatGift US.qbv Browse Apply Open QB File	In order to use the QB Synchronization tool you need to first select your company file. Please make sure QuickBooks is running and the selected company file is open.					
Browse Apply	Select Your Company File					
Open QB File	Company file C:\Users\Public\Documents\Intuit\QuickBooks\Company Files\GreatGift\GreatGift US.gbw					
	Browse Apply					
NextClose	🕥 Open QB File					
NextClose						
NextClose						
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#### Importing from QuickBooks

IMPORTANT: Skip this step if you already have data in AdvancePro. This is only for setting up a NEW AdvancePro company file. If your data has already been imported or manually entered, this will result in duplicate records!

1. Log into the QuickBooks company file as an admin user.

- 2. Go to the 'Import' tab and select the appropriate option in the "Import QB Inventory Assemblies as" section:
- Select "AdvancePro Item Kits" if you are not using the Manufacturing module.
- Select "AdvancePro Assembly Items" if you are using the Manufacturing module and have assemblies to import.

3. Click the 'Initial QB Import' button once ready to start the import.

QuickBooks Settings 🛛 🗕 🗆 🗙					
Set Up Import Export Categories Auto Export					
Import existing data from QuickBooks					
Import data from QuickBooks.					
U Initial QB Import					
Import Progress NOTE: This is a one-time only import					
If you are evaluating AdvancePro you can import your data for testing purposes and clear the database once you are ready to 'Go Live'. Tip: To delete the database go to the Admin/Utilities ioon and clear your database. You will lose all your test data and can re-import your data from QuickBooks and start fresh.					
Import QB Inventory Assemblies as:     C AdvancePro Item Kits ⑦     AdvancePro Assembly Items (requires Manufacturing Module ⑦					
The following items will be imported from QuickBooks: Customers: Vendors: Products: Assembly Items; Shipping Methods; Payment Terms, Tax Terms, Sales Reps, Payment Methods and Currencies					
Next Close					

4. If the following prompt is displayed in QuickBooks, select the level of access you wish to grant and then click 'Continue' and 'Done' on the next window.

Note: If you have multiple users and are granting access even when QuickBooks is not running, there will be a dropdown to select a user. Be sure to select an admin user as other users will not have sufficient privileges for various types of exports.

	QuickBooks - Application Certificate	×
Centifi	An application is requesting access to the following QuickBooks company file: GreatGift US Access may include reading and modifying QuickBooks data as well as enhancing the QuickBooks user interface.	
	THE APPLICATION CALLS ITSELF AdvancePro	
	CERTIFICATE INFORMATION Description:	
	Developer: AdvancePro Technologies (1864803 Ontario Limited) Developer identity has been verified by: COMODO RSA Code Signing CA	
	QUICKBOOKS SOLUTIONS MARKETPLACE S Learn about applications that integrate with QuickBooks	
Do you want to allow this ap	plication to read and modify this company file?	
O Yes, prompt each time		
O Yes, whenever this Quick	Books company file is open	
Yes, always; allow acces	s even if QuickBooks is not running	
Allow this application to a	access personal data such as Social Security Numbers and Tell me m	ore
	Continue Cancel Help	

5. Click 'OK' on the AdvancePro Confirmation pop-up window.

	AdvancePro: Confirmation	×
i	This import may take from 5 minutes up to 3 hours depending on the size of the selected QB company file. This process will use much of your machine's resources therefore your machine may seem to be frozen until the import has completed. You may not be able to work on your machine while the file is being imported. Click on OK if you want to Continue with the import. Continue?	
	OK Cancel	

**6.** If you are NOT importing assembly items, the import process will finish after a short period of time (depending how many items are being imported) and you will see a message confirming that all items have imported.

AdvancePro ×
All Items have been Imported from QuickBooks
ОК

#### **Importing Assembly Items**

If you are importing assembly items, you will need to repeat the import process after it finishes. This is because components of assemblies need to import before the assembly items. In cases where there are sub-assemblies, it may be necessary to repeat the import process two or more times for all levels of assembly items to import.

1. To repeat the import process, go back to the 'Import' tab, select the 'AdvancePro Assembly Items' option and then click the 'Initial QB Import' again.

QuickBooks Settings – 🗆 🗙					
Set Up Import Export Categories Auto Export					
Import existing data from QuickBooks					
Import data from QuickBooks.					
U Initial QB Import					
Import Progress NOTE: This is a one-time only import					
If you are evaluating AdvancePro you can import your data for testing purposes and clear the database once you are ready to 'Go Live'. Tip: To delete the database go to the Admin/Utilities icon and clear your database. You will lose all your test data and can re-import your data from QuickBooks and start fresh.					
Import QB Inventory Assemblies as:					
C AdvancePro Item Kits ?					
The following items will be imported from QuickBooks: Customers: Vendors: Products: Assembly Items; Shipping Methods; Payment Terms, Tax Terms, Sales Reps, Payment Methods and Currencies					
NextClose					

2. After the next import finishes, you may see the following message:

AdvancePro	×
Assembly import failed. Please try import again. Click Ok to view log file	
OK Cancel	

3. Click 'OK' to view which assembly items have not yet imported and then repeat the import process until you no longer receive the 'Assembly import failed' message. At this point all assemblies will have imported.

#### **Configuring Product Account Settings**

Before exporting to QuickBooks for the first time, it is necessary to configure the default accounts that will be debited/credited when exporting transactions and adjustments to QuickBooks.

The asset, income and COGS accounts for products will be updated in QuickBooks during the export to match the accounts specified in AdvancePro. If you need to specify different accounts for specific types of products, you can create category specific overrides which will be discussed in the next section.

#### To set the default account settings:

- 1. Click on the 'Export' tab of the QuickBooks Settings window.
- 2. Select the appropriate account from each drop-down and click 'Finish' to save the changes.

QuickBooks Settings	-	×
Set Up   Import Export   Categories   Auto Export		
Export AdvancePro data into QuickBooks		
Step 1. Your Accounts list has already been Imported. You may Re-Import these Account Re-Import Re-Import button.	ts at any time by	using the 👩
Do not reset default QB Accounts during Accounts Re-Import		•
Step 2. Select QuickBooks Accounts (all QuickBooks versions)		
Asset account - Select an Account -		
Income account - Select an Account -		
COGS account - Select an Account -		
Accounts Receivable account - Select an Account -		
Accounts Payable account - Select an Account -		
Default Deposit to Account - Select an Account -		
Shipping Account Select an Account		
Services Account - Select an Account -		
Services Adjustment Account - Select an Account -		
Default Discount Account - Select an Account -		
Select only if using QuickBooks 2003 or newer versions	?	
Negative Inventory Adjustment account - Select an Account -		
Positive Inventory Adjustment account Select an Account		
	Finish	Close

**Explanation of Account Settings:** 

- Asset Account This is the inventory asset account that will be debited or credited by changes to inventory.
- Income Account This will be credited when invoices export to QuickBooks.
- COGS Account This will be debited when invoices export to QB.
- Accounts Receivable Account This will be debited when invoices export to QuickBooks.
- Accounts Payable Account This will be credited when bills export to QuickBooks.
- **Default Deposit to Account** This specifies the default option when receiving payments in AdvancePro and can be overridden. It should be an 'Other Current Asset' or 'Bank' account type.
- **Shipping Account** This is the account that will be used for shipping charges on invoices and bills. A 'Shipping' item will be created in QuickBooks by AdvancePro and will appear on invoices and bills with shipping charges.
- Services Account This corresponds to the 'expense account' field for service items in QuickBooks. This account will be debited/credited when service items are used on bills or invoices.
- Services Adjustment Account This is a clearing account used for tracking freight costs on bills. This is applicable if you are using the freight module for tracking landed costs.
- **Default Discount Account** This specifies the default account that will be used for promotion codes (which can be overridden). Each promotion code created in AdvancePro will create a corresponding discount item in QuickBooks that will appear on invoices. The account can either be an expense or income (contra-income) account.

 Negative/Positive Inventory Adjustment accounts - These are used for tracking adjustments to inventory and MUST NOT be the same as the asset account (they offset the adjustments to the asset account). Typically these would be expense, income or COGS accounts and may be separate accounts or a single account for tracking both negative and positive adjustments.

#### Setting Accounts for Specific Product Categories

If you use different accounts for different types of items in QuickBooks, you can set category specific overrides in AdvancePro. For each category, you can specify an Asset, Income, COGS and Expense account that will override the default account settings. If all your products are assigned to the same accounts in QuickBooks, you can skip this step.

If you have not already done so, you will need to create the categories and assign the products to those categories as necessary. See: How to Create Categories and assign Products to Categories

#### To set the category specific account settings:

1. Go to 'QuickBooks' > 'Settings' > 'Categories' tab.

2. Select a category from the 'Categories' drop-down and then select any accounts from the options below that you want to override the default settings.

3. Once one or more accounts have been selected, click 'Save.' (For any you do not specify, the default accounts will be used.)

4. Repeat steps 2-3 for any other categories that require unique account settings.

			QuickBooks Set	tings	-	• • ×
Set Up	Import Export	Categories A	Auto Export			
	QuickBooks	Accounts for	Categories			
		Categories	Electronics	-		
		-	,	_		
	As	sset account				
	Inco	ome account	*Inventory Asset:Camera *Inventory Asset:Electron	s nics	^	
	CC	GS account	*Inventory Asset:Tools Accumulated Depreciation			
	Expe	nse account	Furniture and Equipment			
			Security Deposits Asset			
			Undeposited Funds		<sup>✓</sup> Save	Close
-View /	Accounts for (	Categories —				
No	Categories		sset Account	Income Account	COG	S Account
1	Cameras	- Ir	nventory Asset:Cameras			
<						>
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#### Manually Exporting to QuickBooks

IMPORTANT: backup your QuickBooks and AdvancePro company files prior to your first export. If any items or settings in AdvancePro are different than QuickBooks, then the corresponding items and settings will be updated in QuickBooks during the export. Backing up will allow you to roll back if you have made a mistake on the setup and need to reconfigure.

#### To manually export to QuickBooks:

1. For the first export, ensure that you are logged into the company file in QuickBooks that AdvancePro is configured to export to (and only that file) as an admin user.

2 Go to the 'QuickBooks' tab and click 'Export to QB.'

ast expo	rt performed by: Date: 1/11/2017 2:59:00 PM	Expo	rt to 🕩
H.	Items To Export	Pending	Qty
O	Customers		<u>19</u>
ettings	Vendors		4
	Products		28
É	Service Items		0
<b>=</b> 07	Sales Reps		0
eports	Carriers		0
	Payment Terms		0
	Payment Methods		0
	Currencies		1
	Tax Items		0
	Invoices (Shipped Customer Invoices)	0	0
	Payments Received		1
	Credit Memos (Received Customer RMA's)		0
	Bills (Received Vendor Orders)	0	0
	Vendor Credit Memos (Shipped Vendor RMA's)	0	0
	Promotion Codes		0
	Assembly Build	0	0

3. The below pop-up message will be displayed during the export and the "Export Progress" bar will indicate the current progress.

QB Export
QuickBooks Export in progress. The Export process may take some time. Please allow the process to complete or data will not be properly synchronized. This window will close when the Export is complete.

4. When the export has finished, you will see a report of all successfully exported items, as well as any failed items. You can filter the list by clicking on "Export Successful" or "Export Failed" at the top-right.

				1
RefID	Exported	Notes	 	Status
<u>80982</u>	Payments Received	Status OK	 	₽ ₽
80984	Products	Status OK		
80985	Products	Status OK		5
80986	Products	Status OK		5
80987	Products	Status OK		5
80988 80989	Products Products	Status OK Status OK		27 27
80999		Status OK Status OK		P*
80990 80991	Products Products	Status OK Status OK		27 27
	Products	Status OK Status OK		P7
80992				
80993 80994	Products Products	Status OK Status OK		197 197
	Products	Status OK Status OK		27 27
80995 80996	Products	Status OK Status OK		97 97
80996 80997	Products Products	Status OK Status OK		
80998	Products	Status OK Status OK		57
80999	Products	Status OK Status OK		5
81000	Products	Status OK Status OK		57
81001	Products	Status OK Status OK		5
81002	Products	Status OK Status OK		5
81003	Products	Status OK Status OK		P
81004	Products	Status OK Status OK		P
81005	Products	Status OK Status OK		P*
81006	Products	Status OK Status OK		P
81007	Products	Status OK Status OK		P*
81008	Products	Status OK Status OK		57
81009	Products	Status OK Status OK		5
81012	Vendors	Status OK Status OK		57
81013	Vendors	Status OK Status OK		8
81014	Vendors	Status OK		5-
 81015	Vendors	Status OK Status OK		5
81016	Customers	Status OK Status OK		67
81018	Customers	Status OK Status OK		5
81019	Customers	Status OK	 	57
81020	Customers	Status OK Status OK		5
81021	Customers	Status OK		57
81022	Customers	Status OK		52

5. If there are any items that failed to export, you can click the blue "REF ID" number for each line to see more details of the problem. Resolve those issues as necessary and repeat the export process until there are no more failed items shown.

Quic	kBooks Ex	ort Report	Total Records: 10 Total Pages 1 Current Pages 1	age:1 x
			0 PExport Successful 10 PExport Failed Click on the "Export Successful" or "Export Failed" icons to sort	Cleared Error
No	Ref ID	Exported	Notes	Sta
1	<u>81056</u>	Currencies	This feature is not enabled or not available in this version of QuickBooks.	7
2	<u>81057</u>	Reducts	QB Export Statistics AndPurchaseMod aggreg	
3	<u>81058</u>	Products	AndPurchaseMod aggree	
4	<u>81059</u>	Customers	Currencies	*
5	<u>81060</u>	Customers	-	2
6	<u>81061</u>	Customers	Name US Dollar	<b>*</b>
7	<u>81062</u>	Customers		<b>*</b>
8	<u>81063</u>	Customers		<b>X</b>
9	81064 81065	Customers Customers		*
			Export Notes This feature is not enabled or not available in this version of QuickBooks.	
			Export Date 1/11/2017 Exported By Do not export this Item in future Find and Link this Item in QB during next Export Close	

Note: you can continue exporting to QuickBooks any time you want to sync the latest updates and transactions. You will need to be logged into the QuickBooks company file unless you selected the option to allow access to the company file when QuickBooks is not running. If you have multiple company files, you will need to close out of any other files before exporting (or the export may fail).

#### Automatically Exporting to QuickBooks

It is generally recommended to manually export to QuickBooks as this gives you the greatest control over the process. However, you can also configure AdvancePro to export to QuickBooks at set intervals by following the below steps:

1. Go to 'QuickBooks' > 'Settings' > 'Auto Export'

2. Check the 'Enable Auto Export' option and select how often you want the export to be triggered (1 hour is the minimum interval).

3. Click 'Save' to apply the changes.

QuickBooks Settings	-	□ ×
Set Up   Import   Export   Categories Auto Export		
Enable Auto Export to QuickBooks		
Enable Auto Export to QuickBooks		
Enable Auto Export		
Export every II 📑 hour(s)		
	Save	Close

4. Restart AdvancePro to ensure the setting change has taken effect.

AdvancePro will trigger an export going forward at the set interval so long as you are logged into AdvancePro. If you did not select the option to allow access when QuickBooks isn't running during the initial setup, you will also need to be logged into the QuickBooks company file for the export to go through.

Note: it is recommended to review the QuickBooks Export Report daily so that you can make the necessary adjustments if any errors are shown. This will ensure everything continues to run smoothly.