



## Connect to QuickBooks

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# Overview

The following document will take you through the steps necessary to connect your integraRental site to your QuickBooks account. There are a set of directions for QuickBooks Desktop and QuickBooks Online. You will not be able to complete any of the additional integraRental setup steps, other than users, until the connection between integraRental and QuickBooks is completed.

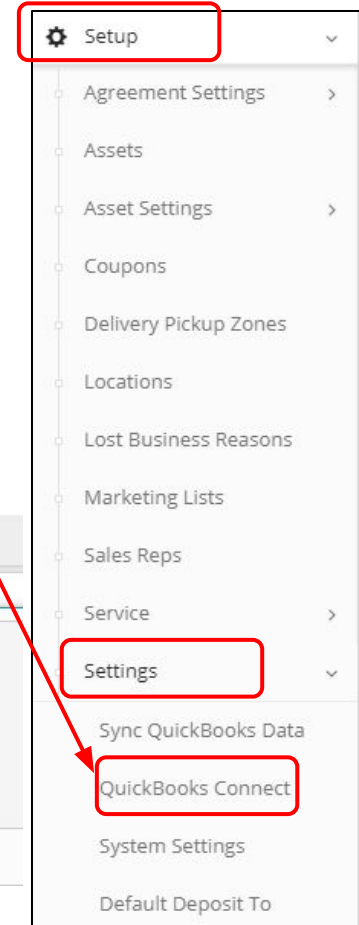
[Connect to QuickBooks Online](#)

[Connect to QuickBooks Desktop](#)

# Connect to QuickBooks Online

# Connecting to QuickBooks Online

To access the QuickBooks connection setup page navigate to the main menu and go to Setup/Settings/QuickBooks Connect. When the page pictured below appears, click the green Connect to QuickBooks button, which will open a new window with the QuickBooks Online login page displayed. If you do not see the new window, your browser's pop-up blocker may have stopped it from coming up. Please move on to the next slide for help with pop-up blockers.



Home / Setup / Settings QuickBooks Connect

QuickBooks Connect

### Connection FAQ

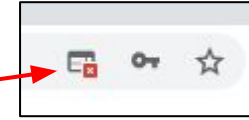
integraRental is able to access and modify information real time directly in QuickBooks. The only exception to this is QuickBooks items (Inventory, NonInventory, Services) which are automatically synchronized with integraRental initially and then as items are changed in QuickBooks. Automatic synchronization of items typically happens very quickly but it can take up to approx 3 minutes to changes to be propagated from QuickBooks. integraRental will setup references to QuickBooks data such as customer, products and tax codes. Below is a short summary of the data reference from QuickBooks and how it is used.

- Customer information such as name, address etc is saved on the rental agreement. Customer information changed on the rental agreement is not saved back into QuickBooks.
- A link is created between integraRental Assets and Services to enable the proper revenue recognition on invoices created from integraRental in QuickBooks.
- Changes to invoices in QuickBooks for invoices created by integraRental are not reflected in integraRental. QuickBooks invoices and sales receipts are the point of record for accounting purposes.
- Sales tax configured in QuickBooks should be identical to tax codes configured in integraRental.
- If Customers, Products or Sales Tax entries are referenced in integraRental and then are deleted in QuickBooks, the related references in integraRental will need to be updated.

[Connect to QuickBooks](#)

# Google Chrome pop-up blocker

If your pop-up blocker has stopped the QuickBooks Connect window from appearing, you should see an indicator like the one pictured below on the right edge of the web address bar.



Click on the icon and change the setting to “Always allow pop-ups...” and click Done. Then click the QuickBooks Connect button again to bring up the login window.

# QuickBooks Online login

Once you have logged into QuickBooks Online you may be asked to verify the company file that you wish to connect to integraRental. When done the screen will refresh, and the screen below will now be displayed. Your integraRental site and your QuickBooks Online site are now connected to each other.

QuickBooks Connected On: 5/12/2021 1:03:04 PM  
QuickBooks Connected By: Rentaladmin

**Connection FAQ**

IntegraRental is able to access and modify information real time directly in QuickBooks. The only exception to this is QuickBooks Items (Inventory, Noninventory, Services) which are automatically synchronized with integraRental initially and then as items are changed in QuickBooks. Automatic synchronization of items typically happens very quickly but it can take up to approx 3 minutes to changes to be propagated from QuickBooks. integraRental will setup references to QuickBooks data such as customer, products and tax codes. Below is a short summary of the data reference from QuickBooks and how it is used.

- Customer information such as name, address etc. is saved on the rental agreement. Customer information changed on the rental agreement is not saved back into QuickBooks.
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- Changes to invoices in QuickBooks for invoices created by integraRental are not reflected in integraRental. QuickBooks invoices and sales receipts are the point of record for accounting purposes.
- Sales tax configured in QuickBooks should be identical to tax codes configured in integraRental.
- If Customers, Products or Sales Tax entries are referenced in integraRental and then are deleted in QuickBooks, the related references in integraRental will need to be updated.

**Disconnect FAQ**

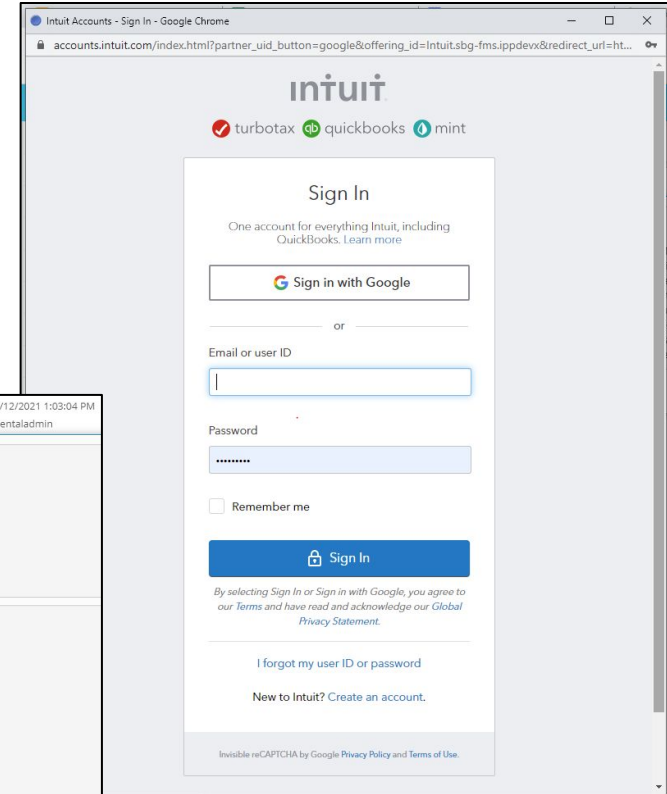
If you disconnect IntegraRental from your QuickBooks instance integraRental will no longer be able to

- Lookup customers for new rental agreements.
- Completed any "billings" to QuickBooks that would create invoices or sales receipts.
- Associate new assets to QuickBooks products (items) or change the current association between QuickBooks products (items) and rental assets.

If you reconnect integraRental to QuickBooks, you should try to ensure that you connect to a QuickBooks instance that has the exact same Customers, Products and Tax Codes configured as the one you are disconnecting from. If the new instance of QuickBooks doesn't have the same Customers, Products and Tax Codes, you will need to reapply the relationships between the following:

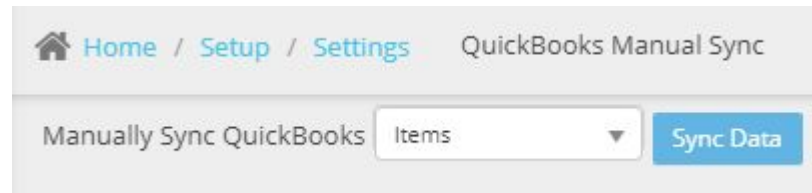
- integraRental Rental Agreements and QuickBooks Customers
- integraRental Rental Assets & Services with QuickBooks Products (items)
- Modify as needed Tax Code setup in integraRental to ensure it matches your QuickBooks instance.

[Disconnect](#)



# Sync QuickBooks Items

Now that your QuickBooks Online and integraRental systems are connected, you will need to complete the first synchronization of your Customers, Products, and Services in QuickBooks. To do so, go to Setup/Settings/Sync QuickBooks Data in the main menu, which will bring up the options pictured here. With the menu option set to Items, click the Sync Data button and wait for the progress bar to complete. Then, change the dropdown menu to Customers and click the Sync Data button again. After syncing both your Items and Customers this first time, all future changes made to Items or Customers in QuickBooks will automatically appear on the integraRental side, within approximately 5 minutes of making the changes. If you need to see the changes made in QuickBooks faster than the 5 minute timeframe, come back to the Sync QuickBooks Data page and run the sync as needed.



# Connect to QuickBooks Desktop



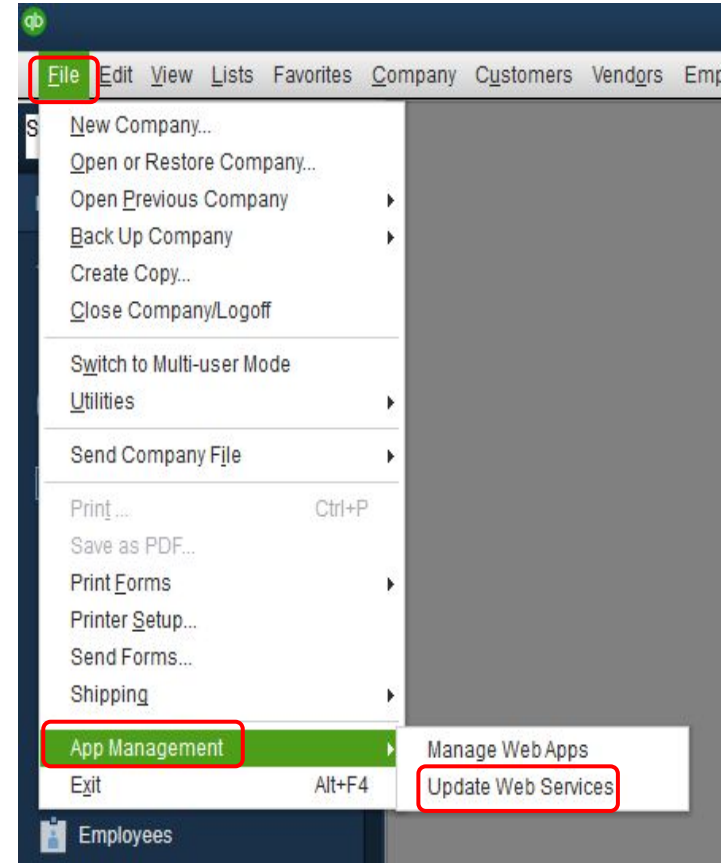
# What is the QuickBooks Web Connector?

Because QuickBooks Desktop is a PC or server based application, and integraRental is a cloud based application, you will need to setup a QuickBooks program called the “QuickBooks Web Connector”. The web connector is a program that sends information to integraRental from QuickBooks, and from integraRental to QuickBooks, to keep the two softwares in sync.

Please have the QuickBooks Web Connector file, provided to you by integraRental, saved on the PC or server where your QuickBooks Desktop software is run, before you move on with the following instructions.

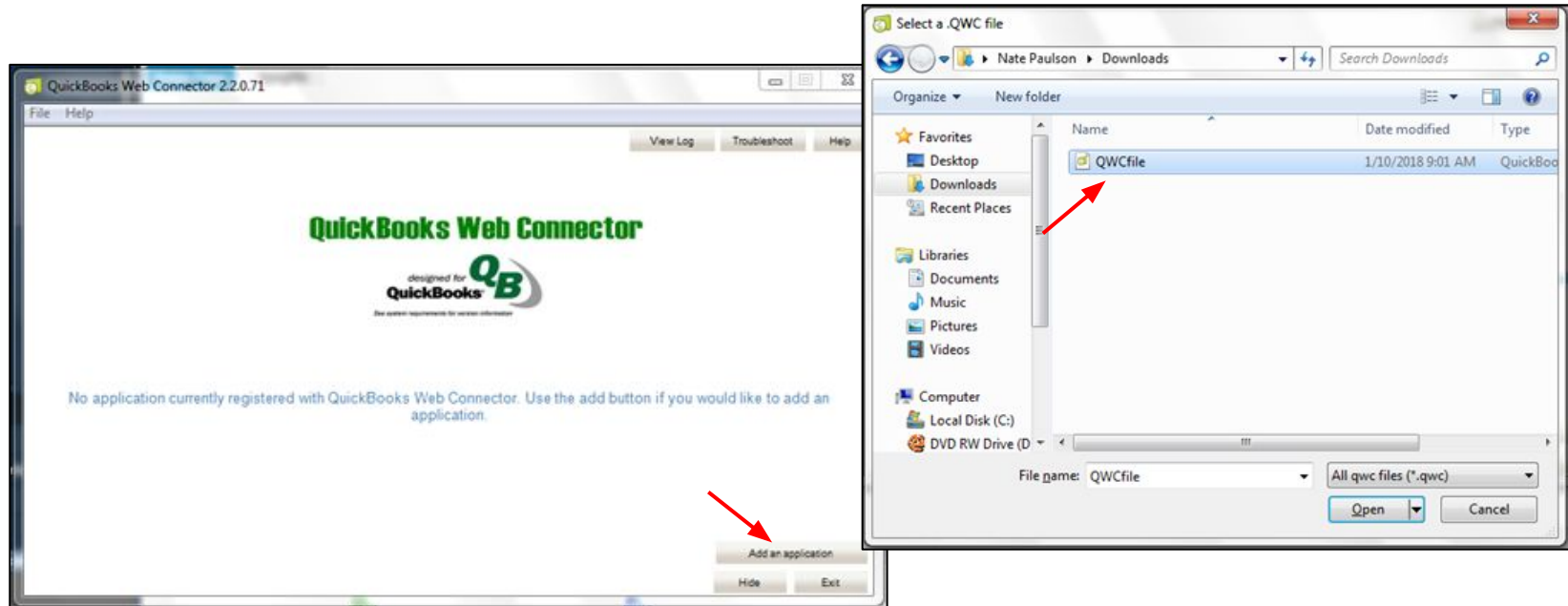
# QuickBooks Web Connector Setup

From your QuickBooks Desktop PC or server, go to the File option in the top left corner, and find Update Web Services. On newer versions of QuickBooks, there may be a sub-menu called “App Management”, and then the Update Web Services option will be under said sub-menu.



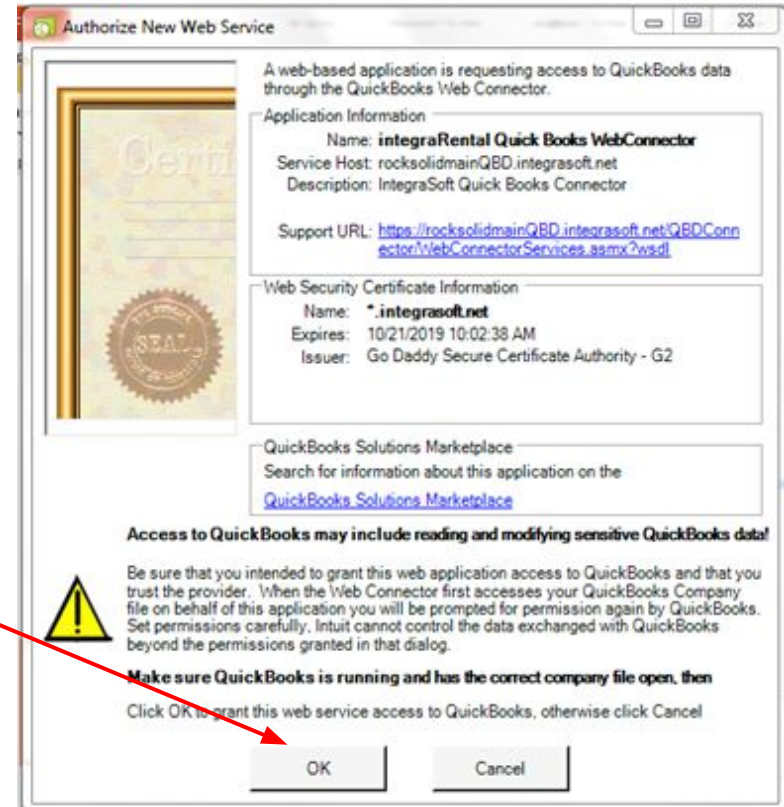
# Install QuickBooks Web Connector File

When the QuickBooks Web Connector window loads, click on the “Add an application” button in the bottom-right corner, which will bring up a window to locate the QBWC file provided to you by integraSoft. The file may be in your downloads folder if you did not save it somewhere else.



# Authorize QuickBooks Web Connector File

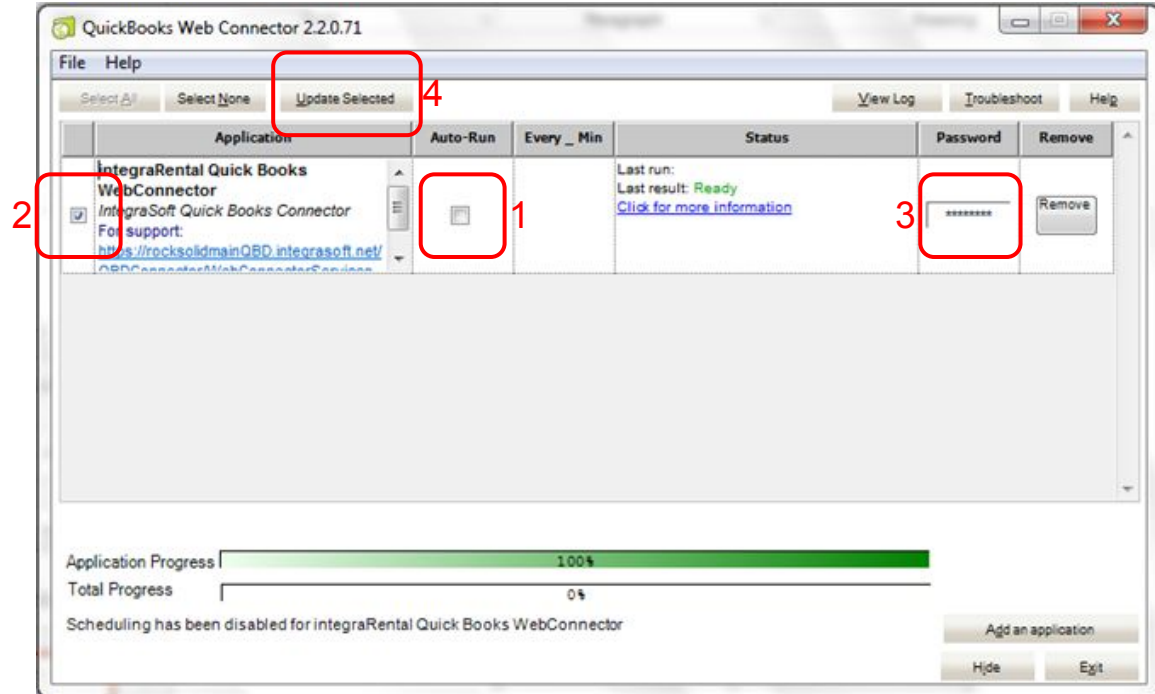
You will be asked to authorize the new web service.  
Click "OK" to continue.



# QuickBooks Web Connector Configuration

Once the Web Service is installed, you will want to run it for the first time:

1. Uncheck Auto-Run
2. Check the checkbox next to the integraRental QuickBooks Web Connector
3. In the Password box enter 6 spaces (space bar 6x)
4. Click on Update Selected

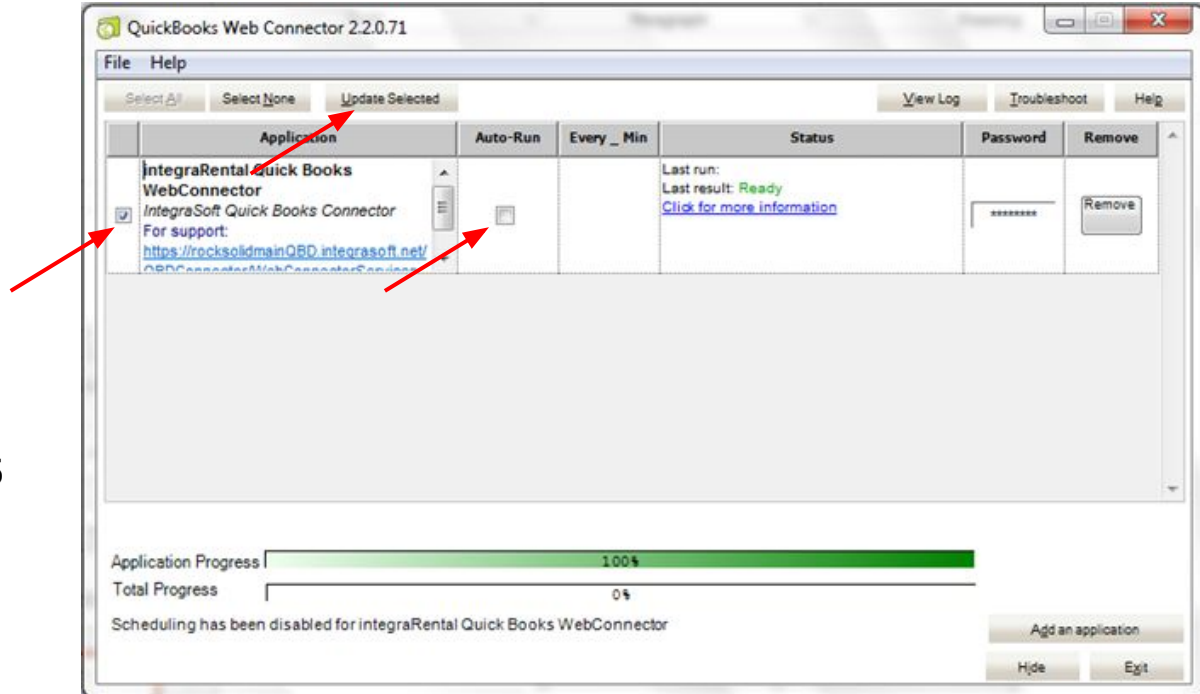


When both the Application Progress and the Total Progress bars are at 100%, you have successfully completed your first synchronization of QuickBooks.

Your Customers, Products, Services, PO's, Invoices, and Tax Rates are all now synchronized with integraRental.

# Auto-Run the QuickBooks Web Connector

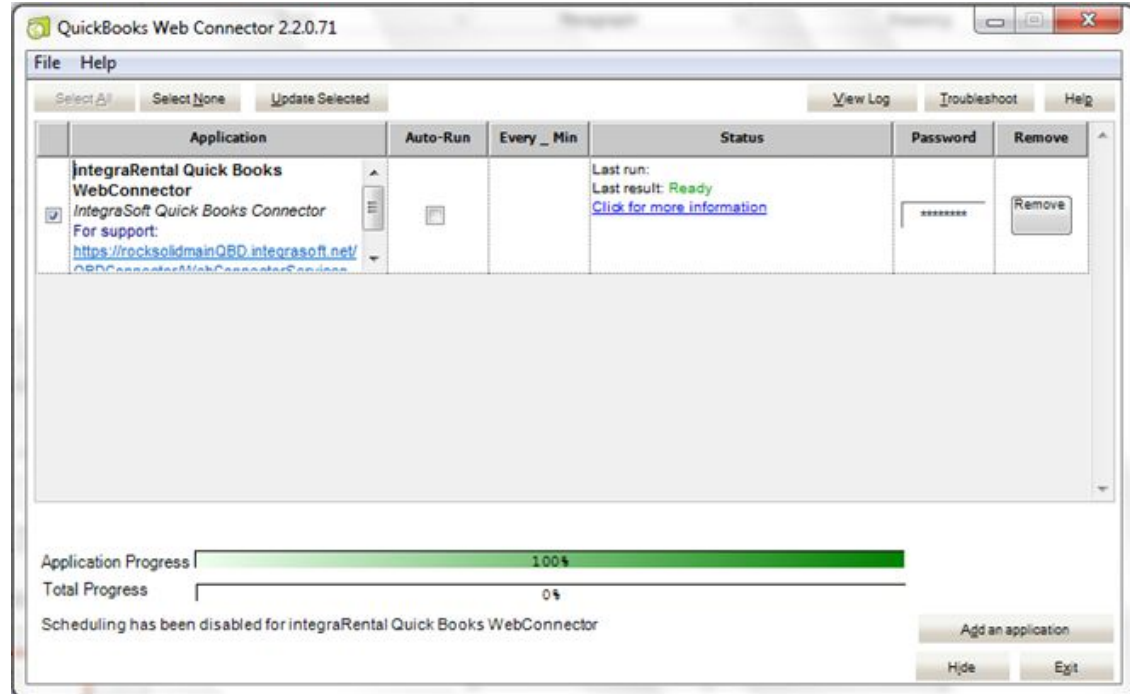
Once you are ready to go live with the integraRental software, you may choose to set your QuickBooks Web Connector to Auto-Run so you don't have to run it manually throughout the day. The recommended interval for synchronization is 5 minute intervals. To set the auto-run, check the Auto-Run box which will then present a text field under the Every\_Min column header. Enter a 5 in the field, ensure that the checkbox to the left of the web connector is checked, and then click Update Selected to save the changes.



# QuickBooks Web Connector Daily Operations

The QuickBooks Web Connector needs to be running at any time that you wish to have integraRental and QuickBooks talking to each other. Many users choose to leave the web connector running at all times.

If the PC or server from which your QuickBooks is run is shut down in the evening, you will want to make sure that your web connector is restarted every morning, or whenever communication between integraRental and QuickBooks is required.





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integraRental Version: 6.7