Steps for clients changing Accounting Systems

Before starting the new sync process, follow the steps below:

1. Choose a date for the purchase receipts to start going to the new Accounting System. This date will be a cut-off date for not entering new purchase recipts.
2. All New and Received Purchase receipts will need to be processed trough to the current accounting system before the new Sync. Any purchase receipts attached to a vendor before the sync, will not send after the sync. All the current vendors will need to be inactivated before the new sync.
3. There will possibly be a period-of-time after the cut-off date that old purchase receipts will still need to be processed to accounting. Do not enter any purchase receipts to be processed to the new accounting system. They should not be entered until after the sync. After the sync, the vendors from the new accounting system will be in Aspire.
4. Once all the Purchase Receipts created prior to the new sync are processed, contact Aspire Care to inactivate all current vendors. Or they can be inactivated manually.
5. All payments & deposits that need to be sent to the current accounting system will need to be done before the sync. Payment and deposits that will be sent to the new accounting system can be entered in Aspire before the sync. They will be sent to new accounting after the sync.

To be able to sync:

- For QB Desktop, obtain a Web Connector password from Aspire Care
- For QB Online, no password from Aspire is needed
- For Acumatica, obtain a Web Service Address & Password from Acumatica consultant
- Redo the information at Administration, Pencil, Accounting sync tab
    - Choose correct Accounting system to Integrate to
    - Fill in accounting #'s or choose (if QB Online)
    - For Acumatica, enter the Web Service Address & Password)
- Add a customer called 'Aspire System'

After new sync:

1. Run the new sync so new vendors will populate in Aspire
2. Send all deposits to new accounting system
3. Create new Purchase receipt(s) in Aspire and test one to new accounting system