

Quickbooks

This is an easy integration. You must allow at least one user on the management page to have the accounting permissions. Only users with permission will be allowed to export the Quick Books data.

INFORMATION REQUIRED

- **At least one user must be assigned to have accounting permissions to use the management page.**

FOR SUCCESSFUL INTEGRATION:

- The photo below shows the section that will allow you to assign categories and items to the appropriate accounting revenue center.
- The customer should be directed to the QuickBooks configuration screen to complete this area themselves.

RECOMMENDED PROCESS:

1. On the Agents page on the management dashboard, click "Add Agent" and select "Quickbooks". Then in "acl" add "permission:accounting" with no quotes.
2. Once this is completed, click on the new Quickbooks agent and in the "Realm ID" box input the Realm ID from the customer.
3. To manage data from GoTab to Quickbooks, after completing the above integration, the "Configure Quickbooks" tab will appear at the top of the "Payouts" section of the manager dashboard.

