

Succeed 2017

In-Depth Look at the ArchiOffice-QuickBooks Integration



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What We Will Learn

- Integration Basics
- Getting Started
- QuickBooks Setup
- ArchiOffice Setup
- Sync Settings
- Smart Match
- Running



Integration Basics

- Send/Get
- Process
- What Actually Ties Between ArchiOffice and QuickBooks
 - Job Codes – Item List
 - Income Account – Services
 - Income Account – Expenses
 - A/R
 - Un-deposited Funds/Bank Account



Getting Started

- Existing – QuickBooks → ArchiOffice
- New – ArchiOffice → Old QuickBooks
- New – QuickBooks → Old ArchiOffice

QuickBooks Setup

- Customers
- Jobs
- Phases from ArchiOffice
- Setting Records as Inactive

ArchiOffice Setup

- Job Codes
- Phases
- Billing Box
- Name and Company Field
- Project Status

Sync Settings

- Setting Active Only
- Proper Cut Off Dates
- Proper Income Accounts

Smart Match

- Eliminating Data Disasters
- What Will Be Synced
- What Has Been Synced

Running

- Order is Important
- Run Frequently

What We Learned

- Integration Basics
- How to Start
- QuickBooks Setup
- ArchiOffice Setup
- Understanding Sync Settings
- Importance of Smart Match
- Running the Sync



Q & A



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