

Sharing Data with QuickBooks Online (QBO)

Most cloudMRP users share some QBO data in order to eliminate any need for double data entry.

We recommend that that you initially share QBO list data (Items, Customers, Vendors, Shipping Terms, TaxRates)....so that you can learn to use the cloudMRP inventory management functionality (multiple locations, serial/lot numbers, Bills of Materials, Work Orders, MRP assembly build shortages etc). Later in the implementation process, you will share Bills and Invoices directly when they are created in cloudMRP.

When you login from www.apps.com....the first screen (Home) includes the buttons to share data with QBO. Note that cloudMRP doesn't autosync data because we have found that each customer is different as to which data they want to share during evaluation and implementation. Fortunately, it only takes seconds to share data....so we will show you how to do the basics....

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CONNECTED To QuickBooks Online!

QuickBooks Online Data

You click a button to import or export data to/from QuickBooks Online.

<input type="button" value="Import Accounts"/>	Imported Customers, Items etc either update existing records or add new records.
<input type="button" value="Import Items"/>	<input type="button" value="Export Items"/>
<input type="button" value="Import Customers"/>	
<input type="button" value="Import Vendors"/>	
<input type="button" value="Import Terms"/>	
<input type="button" value="Import Tax Rates"/>	
<input type="button" value="Import Invoices"/>	Imported Invoices immediately downcount inventory.
<input type="button" value="Import SalesReceipts"/>	Imported Sales Receipts immediately downcount inventory.
Disconnect from QuickBooks (If you do this, you'll have to go back through the authorization/connection process to get connected again)	

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Import Items example

As an example, clicking the "Import Items" button in our sample data file, shows that either new Items are INSERTED in cloudMRP or existing items UPDATED (ie attribute fields like description, selling price etc are updated to the current values in QBO)..

Clicking "Import Customers", "Import Accounts", etc work in the same way....

Transaction History	UPDATED Item Id=CMP0001
Current Invoiceables	
Purchase Order	UPDATED Item Id=cmp_noninv
PO List	
Buy Direct	UPDATED Item Id=cmpxy
Receipts List	
Sales or Work Order	UPDATED Item Id=coffeecup
SO List	
Sell Direct	UPDATED Item Id=Credit
Ship List	
Add Inventory	UPDATED Item Id=Delivery
Subtract Inventory	
Move Inventory	UPDATED Item Id=diamonds
Edit Contacts/Locations	
Edit Items	UPDATED Item Id=Discount
Edit Shipping Methods	
BOM Builder	UPDATED Item Id=dragon
Edit Terms	
Edit Tax Rates	UPDATED Item Id=driver

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Need additional data from QBO?

We prioritize which functionality to add to cloudMRP based on customer requests....so, email us at cloudMRP@erplite.com with your requests.