

Configuring QuickBooks Online Exporter

The QuickBooks Online Exporter plugin is a one-way sync from Ubersmith to QuickBooks Online. Updates made in QuickBooks will not be transmitted to Ubersmith. Every five minutes, any new or updated data in Ubersmith is exported to QuickBooks Online. It is assumed you already have an existing QuickBooks Online company.

The following data is exported:

- Clients
- Service plans
- Invoices
- Refunds
- Payments
- Credits
- Taxes, exported as an item linked to a specific account for each tax

In order to begin exporting your data from Ubersmith to QuickBooks Online, you need to configure Ubersmith and QuickBooks Online. Once all the necessary pieces have been configured, any new or updated data can be exported. The configuration steps are as follows:

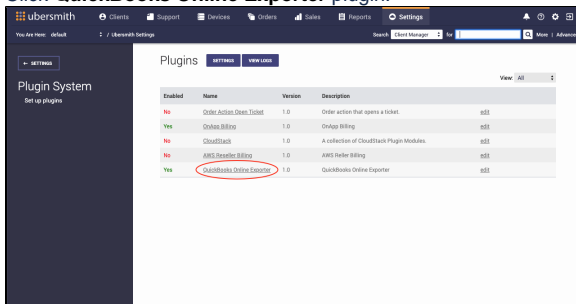
1. [Enable the QuickBooks Online Exporter plugin.](#)
2. Configure the QuickBooks Online Exporter plugin (below).
3. Connect the QuickBooks Online Exporter plugin to your QuickBooks Online account (below).
4. Export your data (below).
5. Troubleshoot any export failures or errors (below).



It is strongly recommend that you test your export by first syncing QuickBooks Online with a test company, before exporting to your production company.

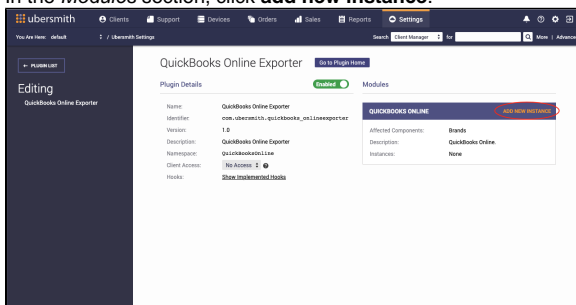
Configuring the QuickBooks Online Exporter Plugin

1. [Access the Plugins page.](#)
2. Click **QuickBooks Online Exporter** plugin.



The *QuickBooks Online Exporter* page appears.

3. In the *Modules* section, click **add new instance**.



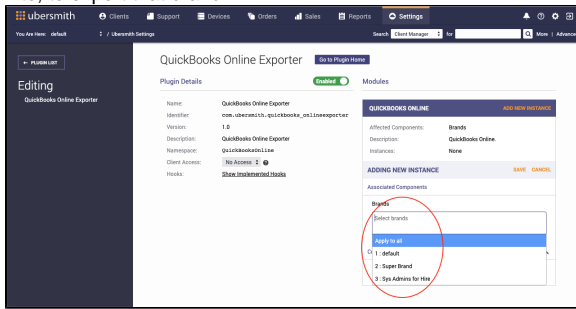
The *Associated Components* section appears.

On this page:

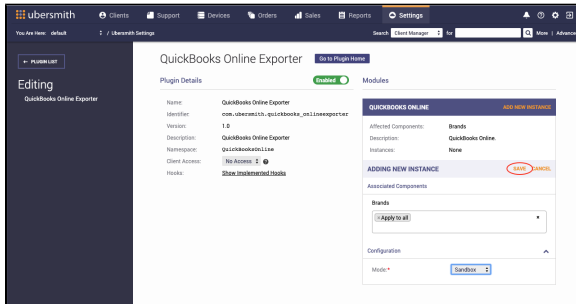
On this page:

- [Configuring the QuickBooks Online Exporter Plugin](#)
- [Connecting to QuickBooks Online](#)
 - [Complete the Connection Tab](#)
 - [Complete the Accounts Tab](#)
- [Exporting Data](#)
- [Troubleshooting Failures and Errors](#)
- [Related Topics](#)

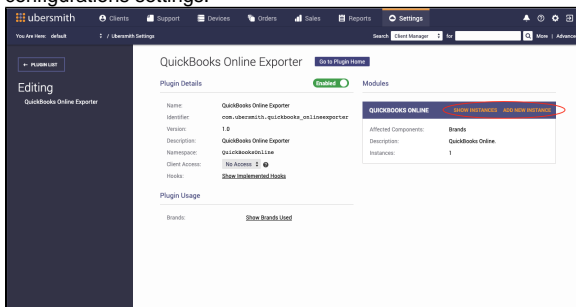
- Click in the **Brands** field to display brand options and select the current brand you are logged into, to export that brand.



- In the **Mode** field, select **Sandbox** to connect to a test QuickBooks Online account, or select **Production** to connect to your actual QuickBooks Online account.
- Click **Save**.



- Click **Show Instances** to display your configurations settings or **Hide Instances** to close your configurations settings.



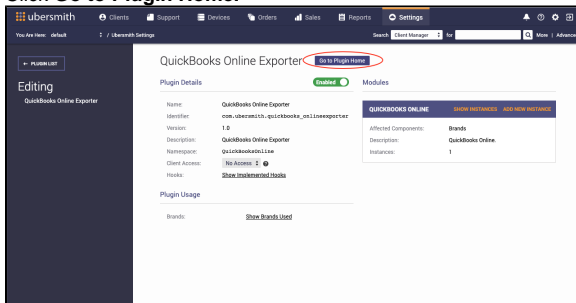
Connecting to QuickBooks Online

This section describes how to establish a connection between your Ubersmith instance and your QuickBooks Online account.

Complete the Connection Tab

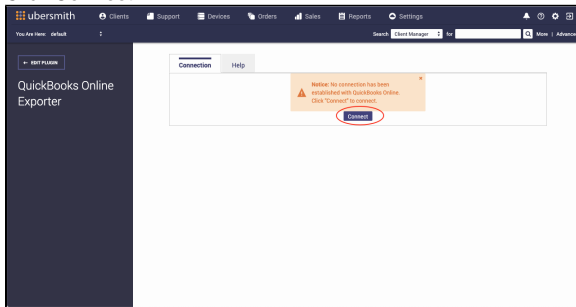
The *Connection* tab establishes a connection between your QuickBooks Online account and your Ubersmith instance. If your login to QuickBooks Online expires, you will need to establish a new connection.

- Click **Go to Plugin Home**.



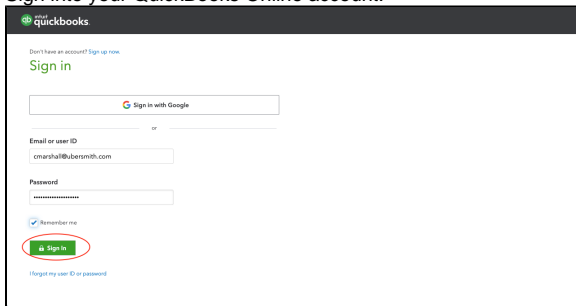
The *Connection* tab appears with a message that no connection has been established with QuickBooks Online.

2. Click **Connect**.



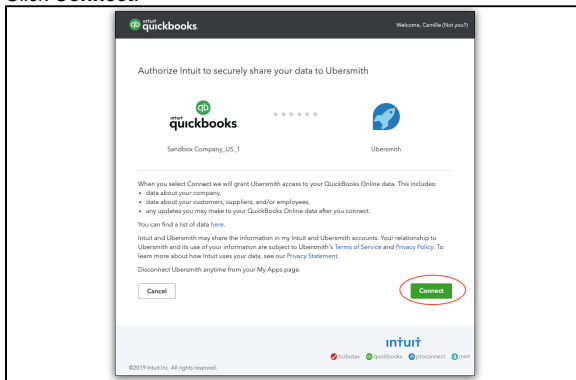
The *Intuit QuickBooks Online Sign in* page appears.

3. Sign into your QuickBooks Online account.



The *QuickBooks Online Authorize Intuit to securely share your data to Ubersmith* page appears.

4. Click **Connect**.



The Ubersmith *QuickBooks Online Exporter* plugin appears with the *Accounts* tab active.

Complete the Accounts Tab

The Accounts tab specifies where services, payments and refunds from Ubersmith are exported to QuickBooks Online. If the appropriate QuickBooks Online accounts are not found, Ubersmith can automatically create a new account, or you can create it in QuickBooks Online yourself. If accounts are found, they are included in the selection fields.

QuickBooks Online account names are unique. If you create a new account multiple times, Ubersmith checks to ensure the name is unique. If not, Ubersmith appends a number to the name, such as Undeposited Funds 1, Undeposited Funds 2, etc.

The default payment and refund account in QuickBooks Online is the Undeposited Funds account. You can keep the QuickBooks Online Undeposited Funds account for both or you can create separate accounts. If you create a new payments account, you can still use the same refunds account by selecting the Use same account as payments option in the Refunds account field.

1. Click the **Accounts** tab, if necessary.



2. In the **Services account** field, select either **Automatically create new account** to have Ubersmith create the Ubersmith service account to export your services to, or select another QuickBooks Online sales of product income type account.



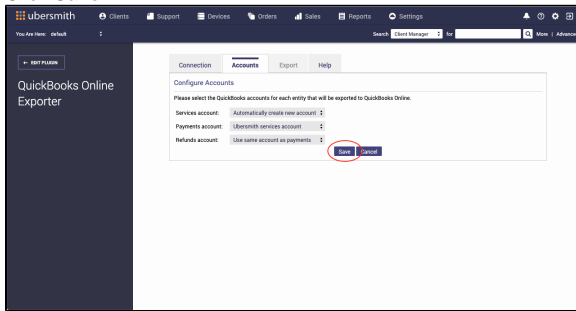
3. In the **Payments account** field, select either **Automatically create new account** to have Ubersmith create the Ubersmith payment account to export your payments to, or select another QuickBooks Online other current asset or bank type account.



4. In the **Refunds account** field, select either **Use same account as payments** to use the same payments account, **Automatically create new account** to have Ubersmith create the Ubersmith refund account to export your refunds to, or select another QuickBooks Online other current asset or bank type account.



5. Click **Save**.



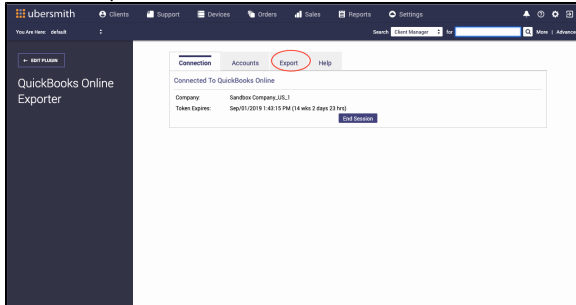
The *Connection* tab appears with your company name and login expiration time.

Exporting Data

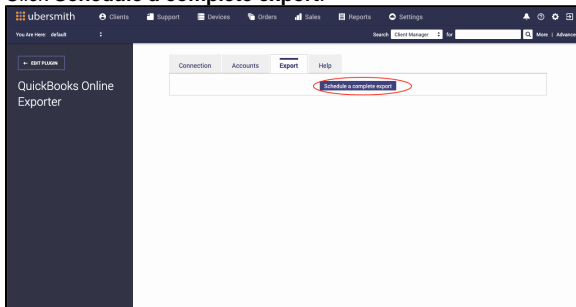
When Ubersmith is connected to QuickBooks Online and the accounts are correctly setup, the *Export* tab becomes available. When exporting, Ubersmith first verifies if the information already exists. If the information does exist it is updated, otherwise it is created.

Your first export can take a long time to complete. After your initial export, ongoing updates are made every five minutes. While exporting, a lock is created to ensure only one export is running. If your export hangs, you can cancel or unlock the export in order to restart it.

1. Click the *Export* tab.

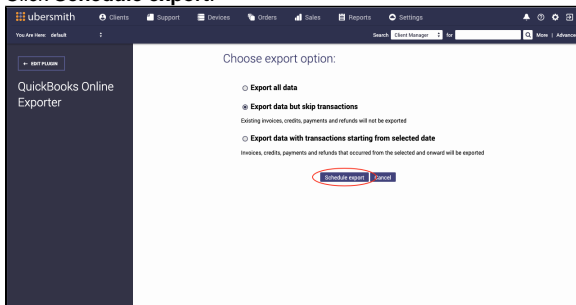


2. Click **Schedule a complete export**.



The *Choose export options* page appears.

- Click **Export all data**, **Export data but skip transactions** to export clients and service plans only, or **Export data with transactions starting from selected date** and the **starting date**.
- Click **Schedule export**.



A message stating your export is in progress along with an export status appears.

Troubleshooting Failures and Errors

When a failure occurs, it can be logged by the Plugin Logger, once it is enabled. See [Managing the Plugin Logger](#) for instructions on enabling and using it.

Related Topics

[Using Plugins](#)

[Integrating Intuit QuickBooks Desktop Pro, Retail, Enterprise, and Accountant](#)