

QuickBooks Pre-Integration Checklist

Before You Begin...

The first step of all QuickBooks Integrations with FrameReady requires that you ensure that certain aspects are prepared in QuickBooks before you move onto FrameReady.

*These steps must be completed by you or your accountant **prior to any appointment** with a FrameReady Support Ally and FrameReady cannot assist with the details of your QuickBooks or bookkeeping.*

Use this list to ensure that you are prepared to begin the integration process.

1. QuickBooks Contacts

Do you have contacts already in QuickBooks?

- **Yes?** Be prepared to review them after importing into FrameReady to ensure that all are linked to a matching FrameReady contact.
- **No?** Easiest method of integration. No concerns for duplicate contacts within QuickBooks.

2. Chart of Accounts

Is your Chart of Accounts finalized?

- **No?** All changes must be final or will require multiple imports to ensure that FrameReady reflects the information correctly.

3. Taxes and Tax Codes

Have you finalized your Tax codes and expected Sales Tax within QuickBooks?

- **No?** All changes must be final or will require multiple imports to ensure that FrameReady reflects the information correctly.

4. Payment Methods

Do you list all possible payment methods in QuickBooks?

- **Yes?** You will be able to match them as necessary in FrameReady.

- **No?** FrameReady can match multiple payment methods to your payment methods in QuickBooks.

5. QuickBooks Products

Create products and services in QuickBooks to represent the Categories of types of items.

- Use broad terms to keep as short a list as your bookkeeping requires.

Do you regularly have tax exempt?

- **Yes?** Make duplicate items that are specifically non-taxable in QuickBooks.

Do you apply percentage discounts to your invoices?

- **Yes?** It is mandatory that for every possible percentage discount you would offer on an invoice that an item is created in QuickBooks for it. It doesn't need to be labeled as anything more than a non-inventory item. These are placeholders for FrameReady to explain discounts to QuickBooks.

After You Are Done...

- Once you have confirmed that all the steps are completed, we will be able to begin the integration process.

Important! Remember that without ALL of these steps being completed before hand you will be unable to properly push your invoices to QuickBooks from FrameReady. We will be required to schedule additional meetings until the process is properly completed.

- Send an email to support@frameready.com to request a Support Ally to assist with your integration.