

QuickBooks to Zoho Desk Extension

Zoho Desk Extension



User Manual

Version 1.0

Prepared By:







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QuickBooks – Zoho Desk Extension: User Manual

1. Overview

QuickBooks is set of software solutions designed to manage payroll, inventory, sales and other needs of a small business. The software's features include marketing tools, merchant services, product and supplies, training solutions. **QuickBooks Extension** is a Zoho Desk Extension developed by Tiara, a Zoho Alliance Partner, and available in Zoho Marketplace for all Zoho users to deploy as an extension for Zoho Desk.

Using this extension, Zoho Desk users can easily manage their QuickBooks services such as managing the time-based service for each ticket using Zoho Desk Ticket/Task Time Entry within Zoho Desk.

This User Manual document provides step-by-step instructions to install this extension from Zoho Marketplace, how to configure and use the functionalities within your Zoho Desk account.

1.1. Install the QuickBooks to Zoho Desk Extension

Go to <u>Zoho Marketplace</u> and search for "QuickBooks" to locate the extension and install directly from the Marketplace. Alternatively, you can install the QuickBooks extension by logging in to your Zoho Desk account and follow the below installation instructions.

To install the QuickBooks to Zoho Desk Extension from within Zoho CRM:

- Go to Setup > Marketplace > All. By default, all the Zoho extensions currently installed within your Zoho Desk account are listed. Go to "All Extensions" tab to view all available extensions.
- Click All Extensions, browse/search for *QuickBooks*, locate (see screenshot below) and then click the extension. The details about the extension will be shown as per screenshot below.
- Select one of the Profile of Users and select department for whom you want to install the extension.
- Click Install button.
- Make sure you check the "Agree to the *Terms of use"* checkbox and click Install.

QBO Extension Fo	or Zoho Desk		
QB	QBO Extension For Zo	ho Desk	
EXTENSION DETAILS	GENERAL SETTINGS		
Set Access Permission Specify which profiles	ons can view or access this extension		
Profiles * All Profiles			
🗹 I have read and a	gree to the Terms of Use		
Install	Cancel		





After installing the extension, click 'Authorize' button to authorize the Zoho Desk account.

		0	Successfully Installed	AUTHORE
	QBO Extension For Zoho Desk		Authorize your account for Zoho Oauth service to activate this extension.	CLOSE
EXTENSION DETAILS	GENERAL SETTINGS COMPOLINATION			
QBO Extension Fo	r Zoho Desk 🧳			
QBO Extension Fo Version 6.0 . Installed	r Zoho Desk 🤌 By geyethni. 14 Mar 2019 10:49 AM			
Version 6.0 , Installed				
Version 6.0 . Installed	By geyethri, 14 Mar 2019 10:49 AM	Exter	nsion Locations	

After authorizing your Zoho desk account, click 'Authorize' button to authorize the QuickBooks account. Once authorizing both Zoho Desk and QuickBooks account, the extension will be activated.

QB	QBO Extension For Zoho Desk	Authorization Pending Authorize your account for quickbooks service to activate this extension.
EXTENSION DETAILS	GENERAL SETTINGS CONFIGURATION	
	By gwyathri , 14 Mer 2019 10:49 AM	
hodruð trase	ISER level authorisation.	

Specify the Company ID information of your QuickBooks account without any space and click Save.





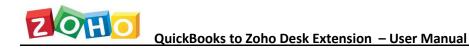
QBO Extension F	for Zoho Desk	
	QBO Extension For Zoho Desk	
EXTENSION DETAILS	GENERAL SETTINGS CONFIGURATION	
Company ID 112324456		

1.2. Finding your QuickBooks Company ID (mandatory parameter for installing QuickBooks Extension)

To activate the QuickBooks to Zoho desk Extension, the below credential is mandatory.

Go to Settings > Your Company > Account and Settings > Billing & Subscription > Company.

ettings		
Company ID: 1231 4	624 8252 304	
QuickBooks	Subscription status	Trial ends in 29 days! Subscribe Now Cancel trial
	Plan details	QuickBooks Plus Upgrade 🕈
	Next Charge	Free through 02/21/2019
Pauroll	Subscription status	Not subscribed Subscribe
region	Super gran conce	His analysis a subscript
Payments	Subscription status	Not subscribed
Checks	Checks and supplies	Order checks & supplies Order 1099s & W2s
	Company ID: 1231 4 QuickBooks Payroll Payments	Company ID: 1231 4624 8252 304 QuickBooks Subscription status Plan details Next Charge Payroll Subscription status Payments Subscription status





2. Customer Integration

The user can create QuickBooks Customer as Zoho desk Customer.

2.1. Create Customer from QuickBooks to Zoho Desk

In Zoho Desk, the following customer Module are created after the successful installation of the Extension. Below are the details of the custom Module created by the extension within Zoho desk.

* **QBO Customer Integration:** Module

After click the QBO Customer integration module, its check the currency locale for both Quickbooks and Zoho desk. If Quickbooks Home currency and Zohodesk Home currency is not same, it restrict the all functionality.

You need to change the same currency locale for both Quickbooks and Zoho desk.

IMPORTANT NOTE:

- 1. Step to Create Customer info:
 - Click QBO Customer integration module.
 - Upon clicking the "RUN" button, the QuickBooks customer information is Created in Zoho Desk and displayed on the "Last run status" and overall Created customer Status displayed on "Overall Run Status".

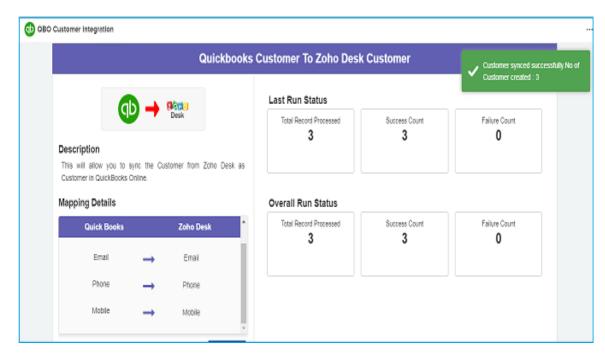
	Quickboo	ks Customer To Zoho Desl	k Customer	
Description This will allow you to sync the Customer from Zoho Desk as Customer in QuickBooks Online. Mapping Details		Last Run Status		
		Total Record Processed	Success Count	Failure Count
		s Overall Run Status		
Quick Books			Total Record Processed Success Count	Failure Count
Email 🛶	Email	0	0	U
Phone 🛶	Phone			
Mobile	Mobile			





2. Mapping fields from Quickbooks to Zohodesk Customer:

Quickbooks Customer	Zoho Desk Customer
Display name	First Name
Mobile	Mobile
Phone	Phone
Email	Email



3. Invoice Integration

The user can create Quickbooks Invoice to Zoho desk Ticket and also create a Zohodesk Ticket time entry and Zoho desk task time entry to Quickbooks Invoice.

3.1. Create invoice from Quickbooks to Zohodesk Ticket

In Zoho Desk, the following QBO Invoice Integration Module are created after the successful Installation of the Extension. Below are the details of the custom Module created by the extension within Zoho Desk.

QBO Invoice Integration: Module





IMPORTANT NOTE:

- 1. Step to create Zoho desk Ticket info:
 - Click QBO Invoice integration module.
 - Upon clicking the Invoice to ticket then click "RUN" button, the Quickbooks Invoice information is Created in Zoho Desk ticket and displayed on the "Last run status" and overall Created Ticket displayed on "Overall Run Status".

		Quick	Books Invoice To Zoho I	Desk Ticket	;
) 🗕 🧌	esk	Last Run Status	Success Count	Failure Count
Description This will allow you to sync		m Qickbooks as Ticktet	0	0	0
Mapping Details	Zoho Desk. Below are mapping details Mapping Details		Overall Run Status		
Quick Books		Zoho Desk	Total Record Processed	Success Count	Failure Count
Inovice Number	→	Subject	0	0	0
		DueDate	1		
DueDate	\rightarrow	Duebble			

2. Mapping fields from Quickbooks Invoice to Zoho desk Ticket:

Quickbooks Invoice	Zoho desk Ticket
Email	Email
Invoice Number	Subject
Due Date	Due Date

If you have a new customer having invoice In Quickbooks.You can directly click the QuickBooks invoice to Zoho desk ticket functionality. At this time Quickbooks invoice as well as customer also created into a Zoho desk Ticket in a single click.





3.2. Create Ticket Time entry from Zohodesk to Quickbooks invoice:

In Zoho Desk, the following QBO Invoice Integration are created after the successful installation of the Extension. Below are the details of the custom Module created by the extension within Zoho Desk.

QBO Invoice Integration: Module

IMPORTANT NOTE:

- 1. Step to create Quickbooks invoice from Module:
 - Click QBO Invoice integration module.
 - Upon clicking the ticket to invoice. It has three functionality to create invoice.
 - 1. Unbilled time entries of tickets and tasks.
 - 2. Unbilled time entries of ticket.
 - 3. Unbilled time entries of task.
 - Unbilled time entries of tickets and tasks is used for to create all ticket time entries and task entries into Single invoice in Quickbooks.
 - Unbilled time entries of ticket is used for to create all ticket time entries into single invoice in Quickbooks.
 - Unbilled time entries of task is used for to create all task time entries into single invoice in Quickbooks.
 - After select the any one of above three as per your need then click "Invoice Selected Tickets" or "Invoice All Tickets" button.
 - If you select "Invoice selected tickets" only selected unbillable Zoho desk time entry information is created in Quickbooks invoice and displayed on the "Last run status" and overall Created Invoice displayed on "Overall Run Status".
 - If you select "Invoice All Tickets" all unbillable Zoho desk time entry information is created in Quickbooks invoice and displayed on the "Last run status" and overall created Invoice displayed on "Overall Run Status".





🕬 📥 👘	Last Run Status	Last Run Status		
Desk V	Total Record Processed	Success Count	Failure Count	
Description This will allow you to sync the Billable Ticket Time Entries from Zoho	0	0	0	
Desk as Invoice in Quickbooks. Below are mapping details Mapping Details	Overall Run Status			
Quick Books Zoho Desk	Total Record Processed	Success Count	Failure Count	
DueDate 🛶 DueDate	Ū	Ū	Ū	
Customer				
Time Entry				
Select items to be invoiced				

2. Mapping Fields from Zoho desk Ticket time Entry to Quickbooks Invoice:

Zohodesk Ticket Time Entry	Quickbooks Invoice
Total Cost	Amount
Customer Name	Customer Name
Due Date	Due date





Desk	(D)	Last Run Status	Last Run Status					
Description This will allow you to sync the Billab		Total Record Processed 1	Success Count 1	 Invoices synced successfully. No o invoices created : 1 				
Desk as Invoice in Quickbooks. Beid Mapping Details	w are mapping details	Overall Run Status	Overall Run Status					
Quick Books	Zoho Desk	Total Record Processed 4	Success Count 4	Failure Count				
Customer	Customer		3.4%					
Time Entry 🛶	Line Item	E						
Message displayed on	Description							
Select items to be invoiced								

3. Step to create Quickbooks Invoice from Inside ticket:

- Open Zoho desk ticket.
- Click "More Actions" then Select Create QBO Invoice.
- Upon clicking the ticket to invoice. It has three functionality to create invoice.
 - 1. Unbilled time entries of tickets and tasks.
 - 2. Unbilled time entries of ticket.
 - 3. Unbilled time entries of task.
- Unbilled time entries of tickets and tasks is used for to create, all ticket time entries and task entries into Single invoice in Quickbooks.
- Unbilled time entries of ticket is used for to create, all ticket time entries into single invoice in Quickbooks.
- Unbilled time entries of task is used for to create, all task time entries into single invoice in Quickbooks.
- After select the any one of above three as per your need then click "Invoice Selected Tickets" or "Invoice All Tickets" button.
- If you select "Invoice selected tickets" only selected unbillable Zoho desk time entry information is created in Quickbooks invoice and displayed on the "Last run status" and overall Created Invoice displayed on "Overall Run Status".
- If you select "Invoice All Tickets" all unbillable Zoho desk time entry information is created in Quickbooks invoice and displayed on the "Last run status" and overall Created Invoice displayed on "Overall Run Status".
- Click **save** button invoice created in Quickbooks.





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17 SIVA 0432 AN DF	GA) Gayathri	CONVERSATION - RESOLUTION 1 TIME ENTRY 1 ATTACHMENT 1	Unbilled time entries of tickets and tasks
#178 test ticket	Status Open Due Date No Due Date set Phone - Product Name - Phonty		Invoice All TimeEntries Invoice Particular TimeEntries
	-None- Clessifications -None-	🔊 Apply Macro 🛛 🖵 Remote Assist ⊘	





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Wids Rock Image: Constraint of the second seco	Status Open Due Date 12 Apr 2019 04:14 AM	All Time Entry +	Select items to be invoiced Unbilled time entries of lickets and tasks
V3 Manikandan 3 12 Apr 0414 AM (0) #107 1006	Phone Product Name	GA gayathri	Invoice All TimeEntries
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	Product Name	GA Gayathri	10:00:00	INVO 57		
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4. Attach Quickbooks invoice into Zoho Desk Ticket

In Zoho Desk, the following Attach QBO Invoice are created after the successful installation of the Extension. Below are the details of the custom Module created by the extension with in Zoho Desk.

Attach QBO Invoice : Module





IMPORTANT NOTE:

- 1. Step to create Zoho desk Ticket attachment as Quickbooks Invoice from inside Ticket:
 - Open Zoho desk Ticket.
 - Click "More Actions" then select Attach QBO Invoice.
 - Upon clicking the Attach QBO Invoice then enter Invoice ID from Quickbooks.
 - After Enter the Invoice ID click Attach PDF then particular invoice Attached into the ticket.

durga 2 Assign To (Pek) (3) Unassigned Status Open Due Date	Image: Will the image:	APPROVAL == Total Time Sper 30 : 00 : 0	0	Edit	
Unassigned Status Open Due Date		Total Time Sper	D	Edit	
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2. Step to create Zoho desk Ticket attachment as Quickbooks Invoice from Module:

- Click "Attach Invoice" module.
- Enter the Quickbooks invoice ID and Zohodesk Ticket ID then click attach.
- After selected Quickbooks invoice as pdf attached into the selected zohodesk ticket





	TICKETS	кв	CUSTOMERS	REPORTS	COMMUNITY	SOCIAL	CHAT	ATTACH INVOICE	Ŧ	zaho +	۹	+	ð	٥	
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							\$	elect Zoho Desk Tic	(et						
							178 -	- test ticket							
								Attach							

5. Support Contacts for Quickbooks to Zoho desk Extension – Tiara Help Desk

Thank you for installing Quickbooks to zohodesk Extension. If you have any questions or facing installation issues, please contact Tiara Support Desk for Zoho Extensions via email at <u>zohosupport@tiaraconsulting.com</u> or call us at **(925) 218 4080**.
