QuickBooks to Zoho Desk Extension

Zoho Desk Extension

User Manual

Version 1.0

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IT Solution Provider

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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.

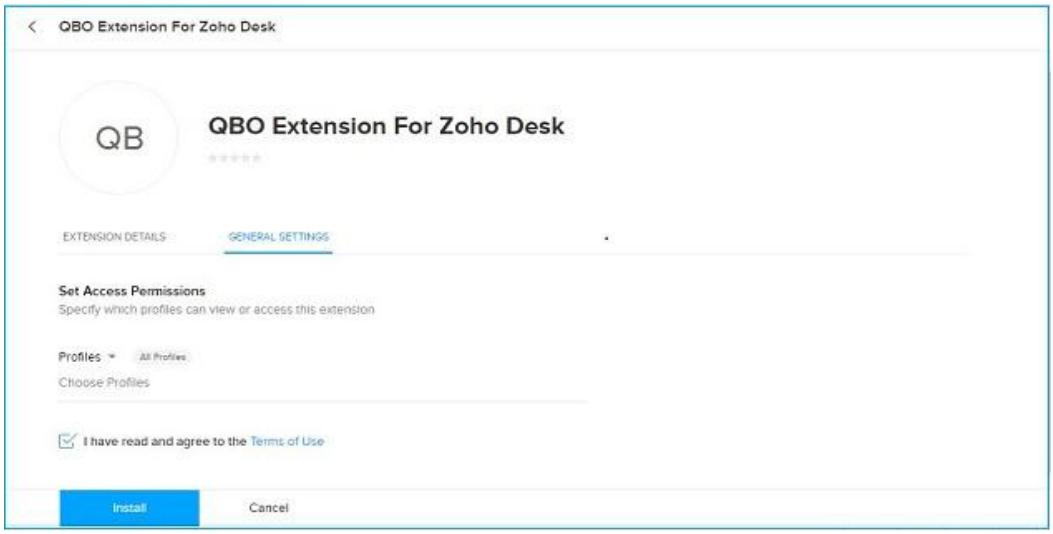
This User Manual document provides step-by-step instructions to install this extension from Zoho Marketplace, how to configure and use the functionalities within your Zoho Desk account.

1.1. Install the QuickBooks to Zoho Desk Extension

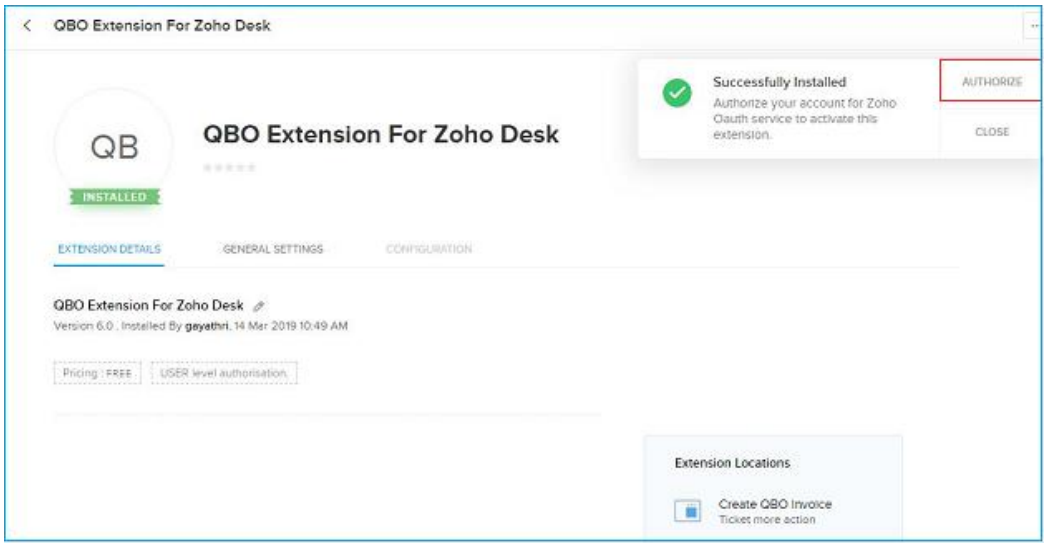
Go to Zoho Marketplace and search for "QuickBooks" to locate the extension and install directly from the Marketplace. Alternatively, you can install the QuickBooks extension by logging in to your Zoho Desk account and follow the below installation instructions.

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

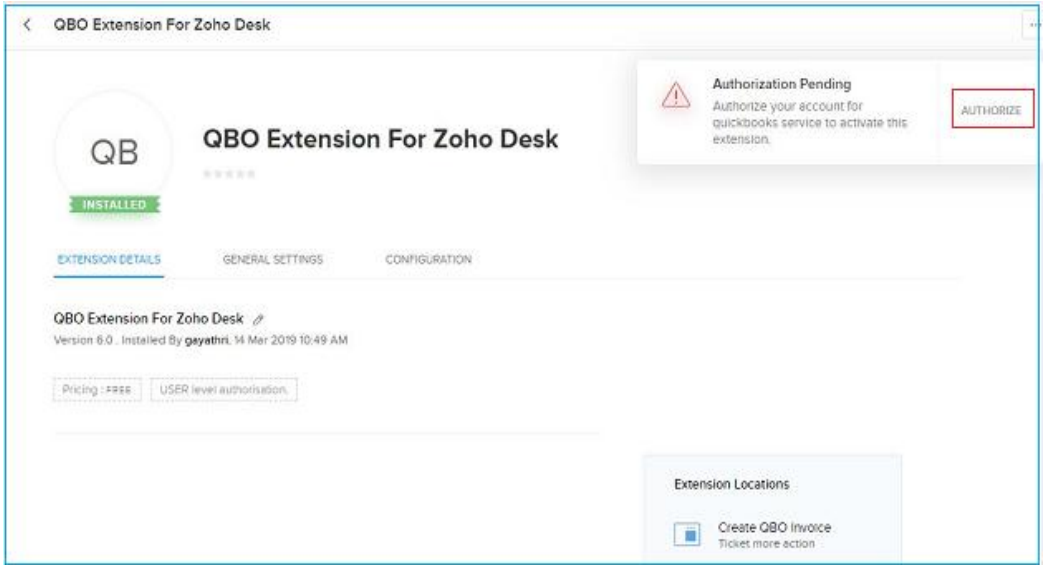
- Go to **Setup** > **Marketplace** > **All**. By default, all the Zoho extensions currently installed within your Zoho Desk account are listed. Go to "**All Extensions" tab** to view all available extensions.
- Click **All Extensions,** browse/search for ***QuickBooks***, locate (see screenshot below) 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**.



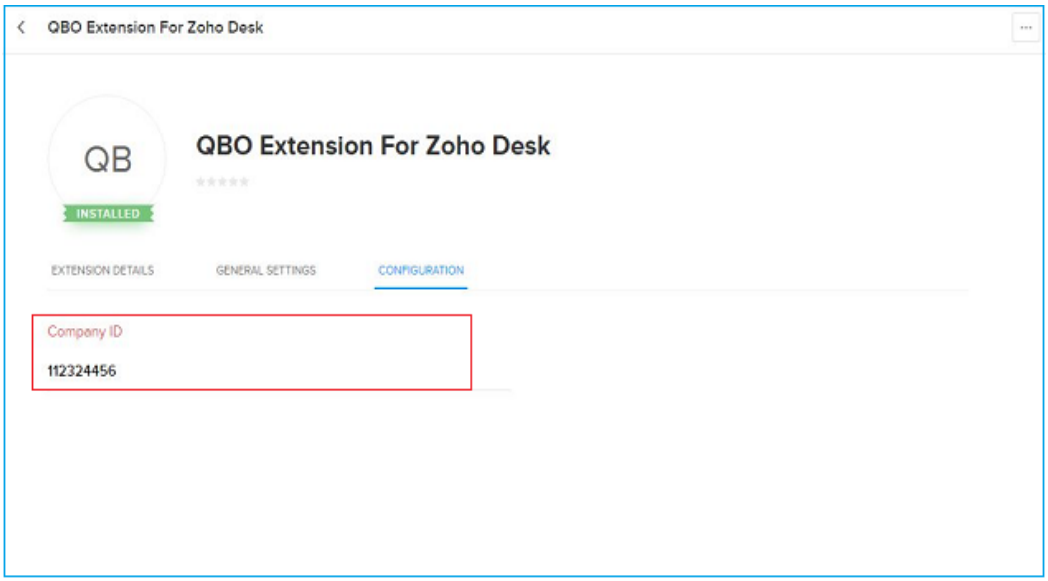
- After installing the extension, click 'Authorize' button to authorize the Zoho Desk account.



- 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.



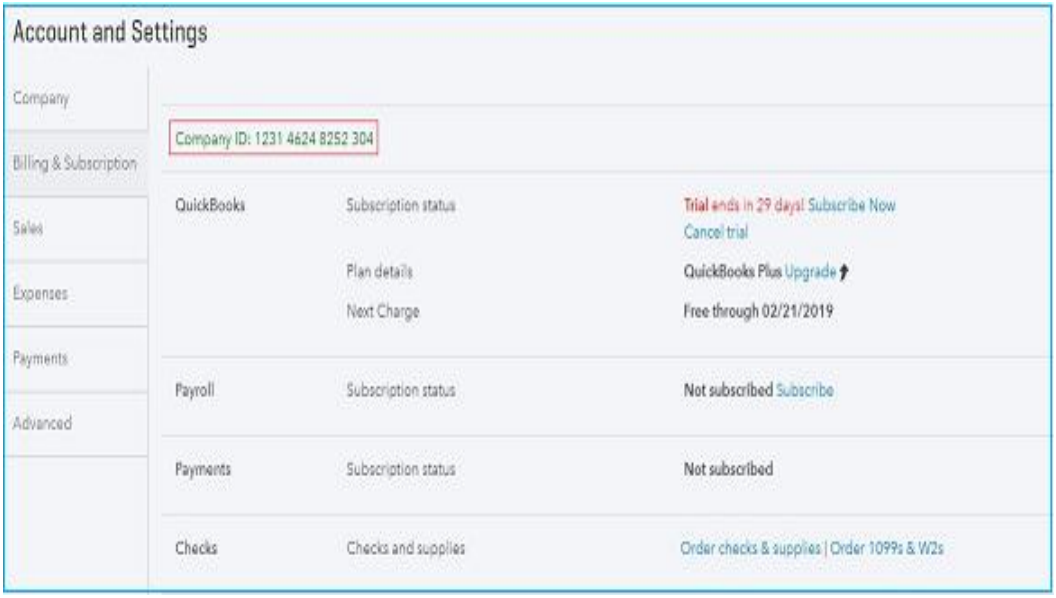
- Specify the *Company ID information* of your QuickBooks account without any space and click **Save**.



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.**



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

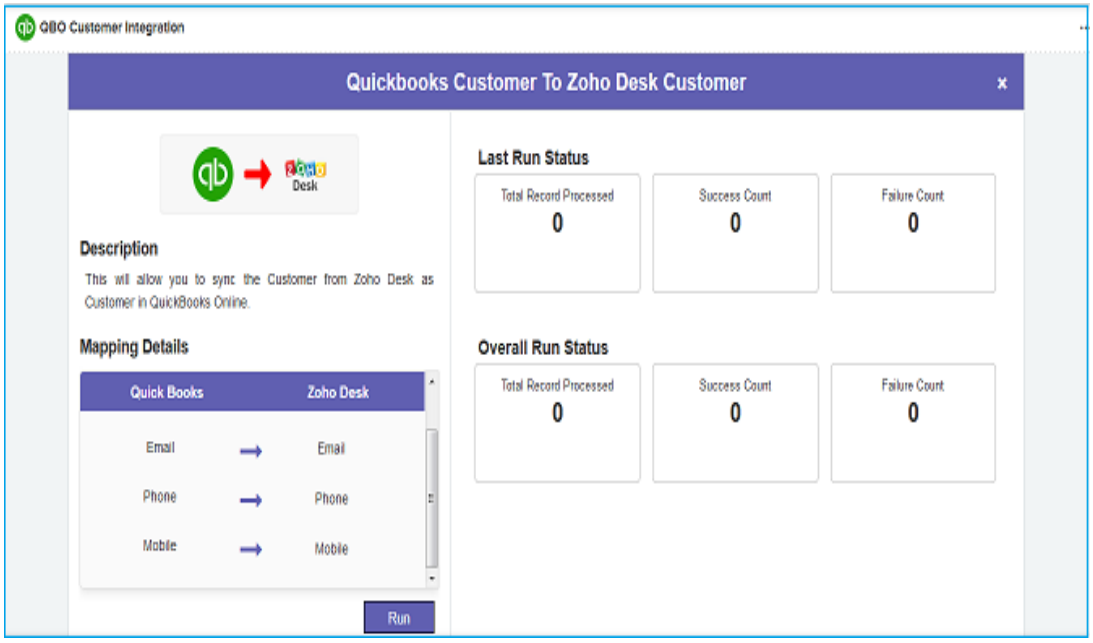
After click the QBO Customer integration module, its check the currency locale for both Quickbooks and Zoho desk. If Quickbooks Home currency and Zohodesk Home currency is not same, it restrict the all functionality.

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

IMPORTANT NOTE:

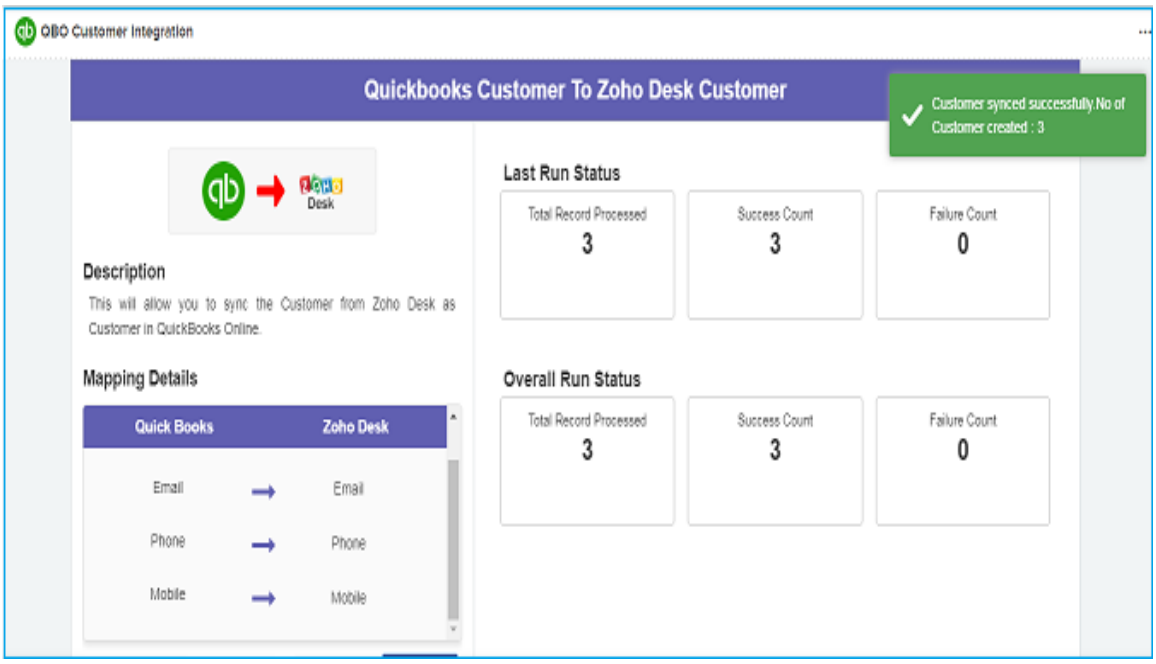
1. **Step to Create Customer info:**

- 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".



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

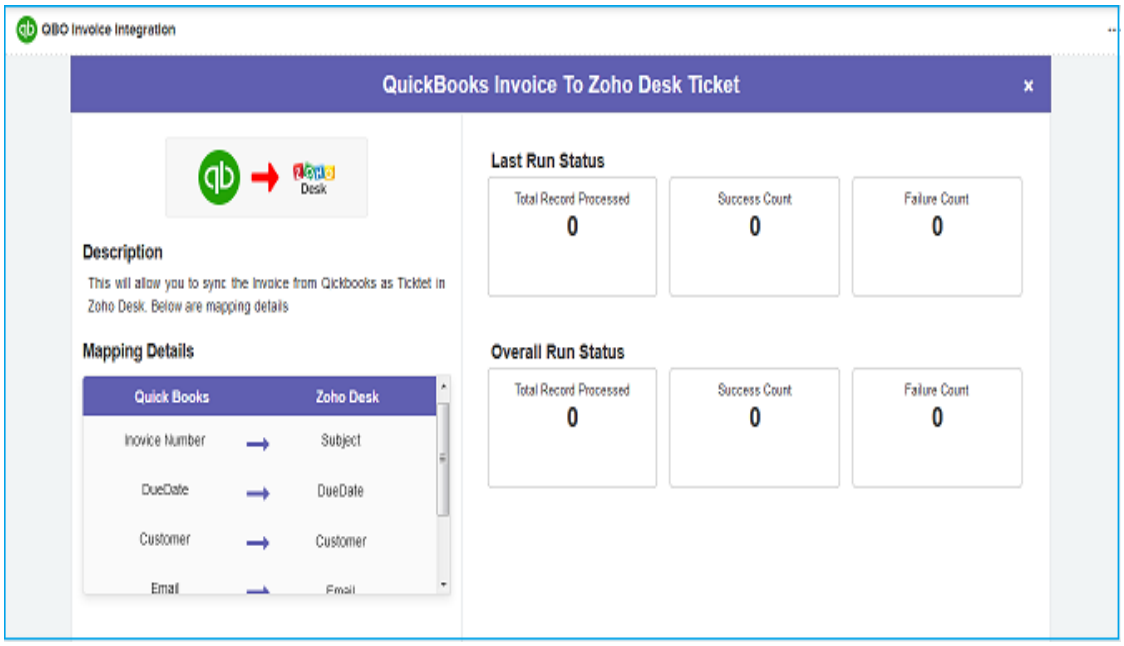
In Zoho Desk, the following QBO Invoice Integration Module are created after the successful Installation of the Extension. Below are the details of the custom Module created by the extension within Zoho Desk.

- **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".



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:

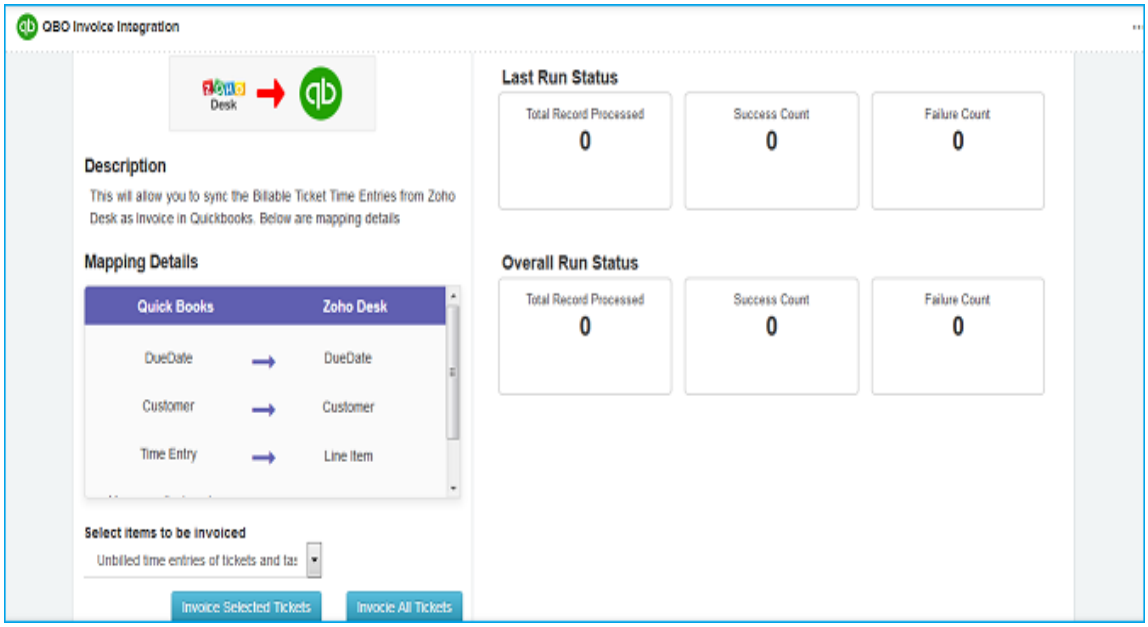
In Zoho Desk, the following QBO Invoice Integration are created after the successful installation of the Extension. Below are the details of the custom Module created by the extension within Zoho Desk.

- **QBO Invoice Integration:** Module

IMPORTANT NOTE:

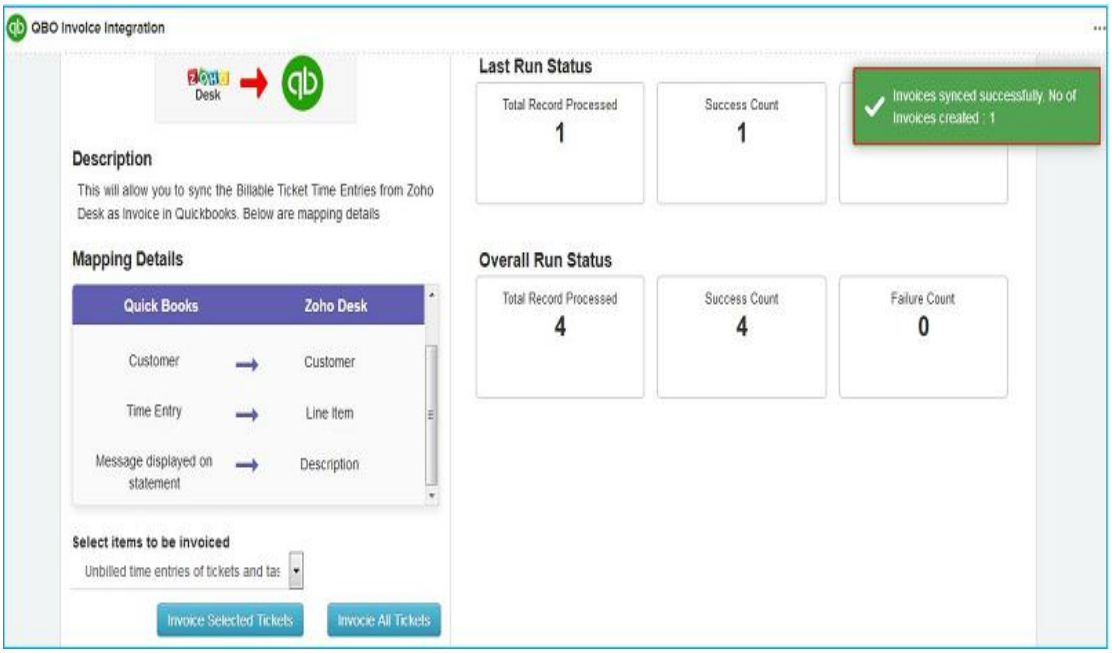
1. Step to create Quickbooks invoice from Module:

- 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".



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



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.
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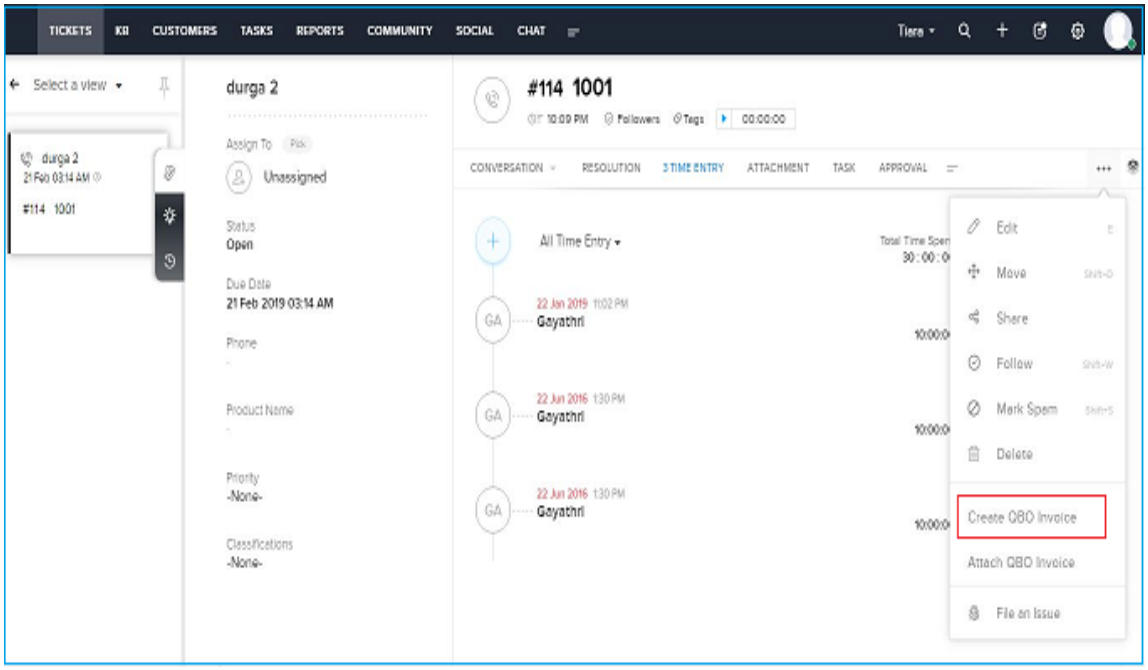
- After select the any one of above three as per your need then click "**Invoice Selected Tickets" or "Invoice All Tickets"** button.
- If you select "**Invoice selected tickets**" only selected unbillable Zoho desk time entry information is created in Quickbooks invoice and displayed on the "Last run 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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APPROVAL
All Time Entry
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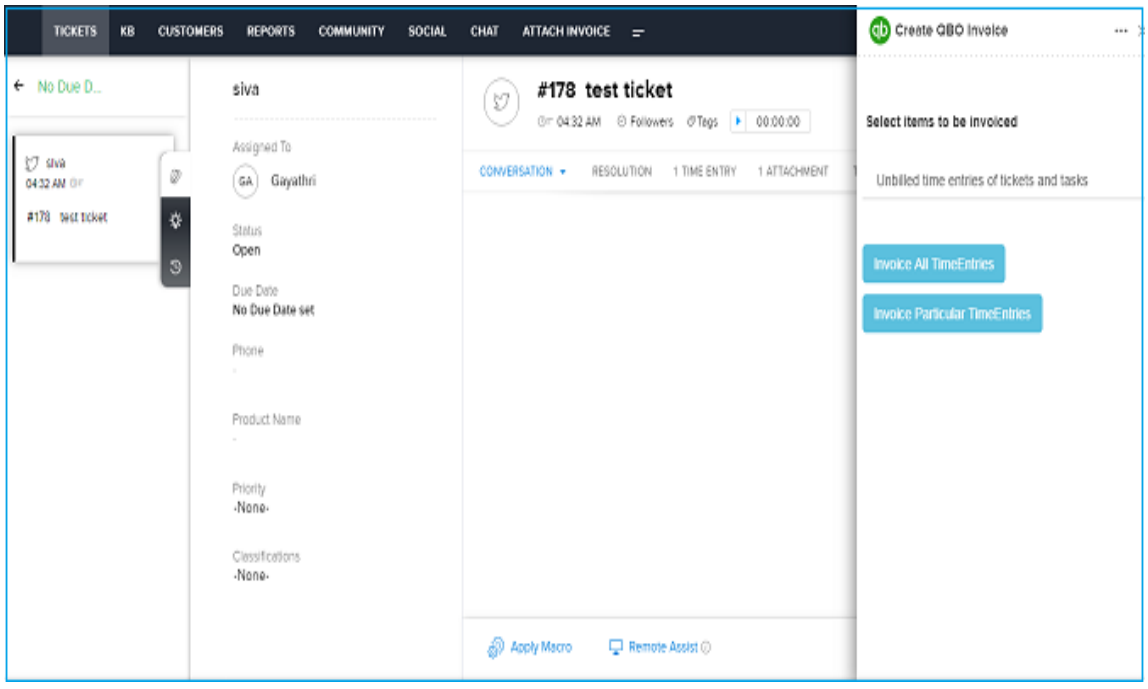
Gayathri
22 Jun 2016 1:30 PM
Gayathri
22 Jun 2016 1:30 PM
Gayathri
Edit
Move
Share
Follow
Mark Spam
Delete
Create QBO Invoice
Attach QBO Invoice
File an Issue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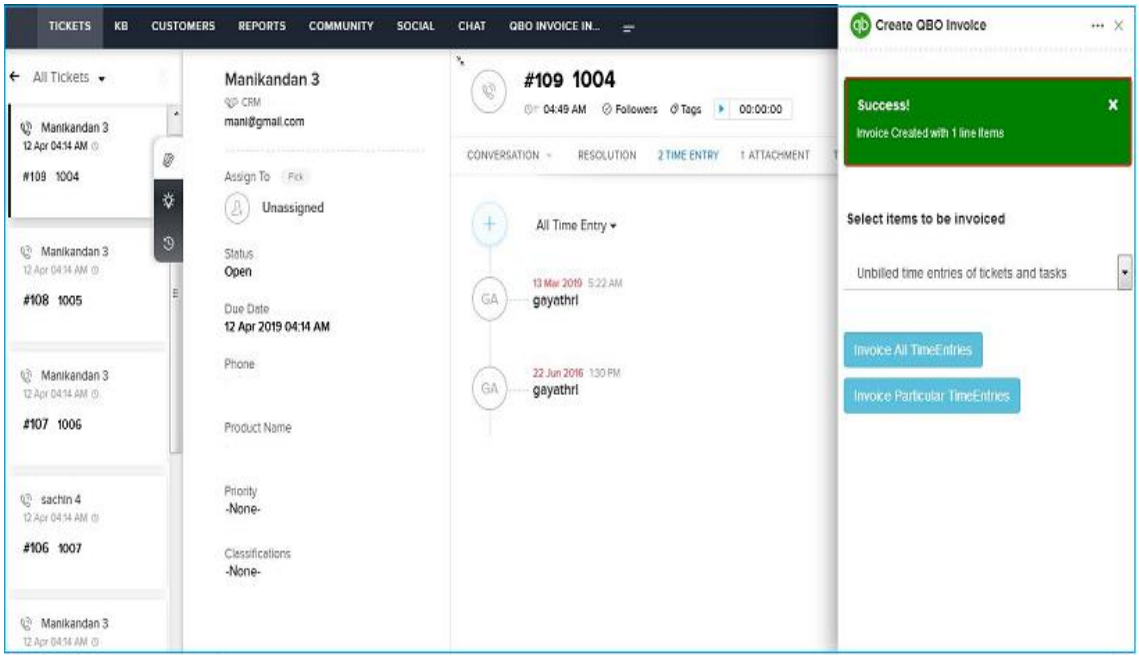
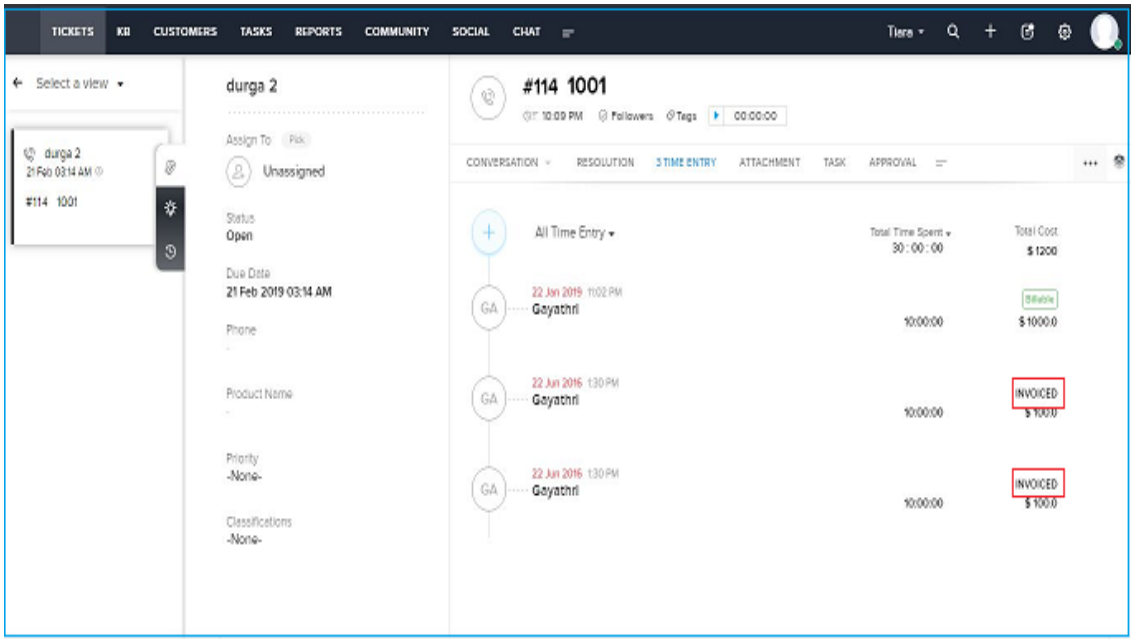
Remote Assist
Create QBO Invoice
Select items to be invoiced
Unbilled time entries of tickets and tasks
Invoice All TimeEntries
Invoice Particular TimeEntries





4. Attach Quickbooks invoice into Zoho Desk Ticket

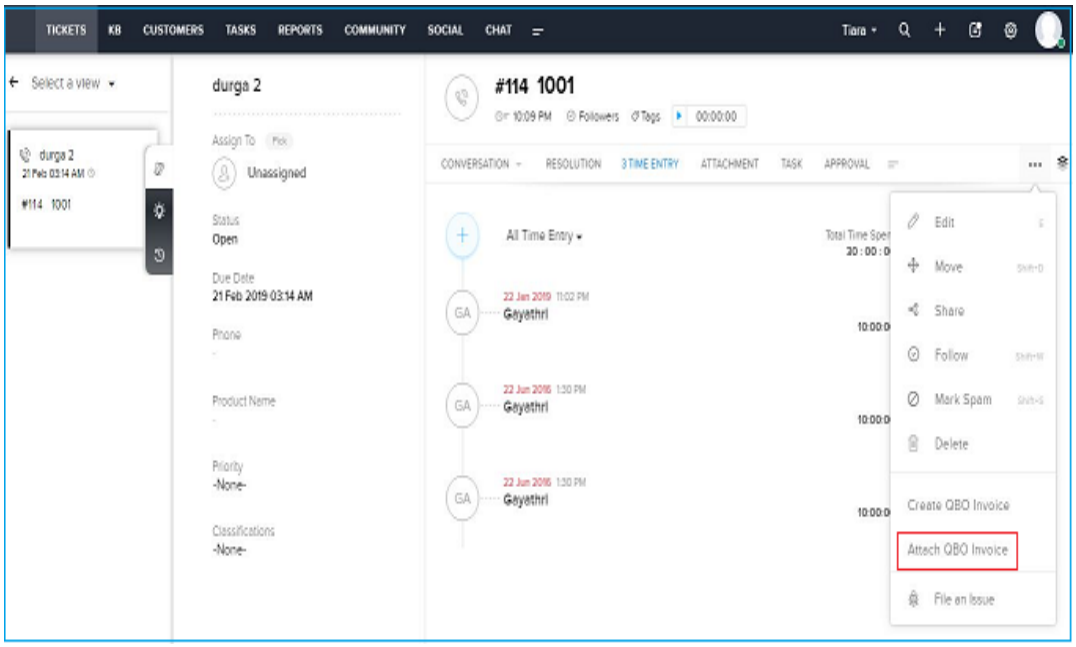
In Zoho Desk, the following Attach QBO Invoice are created after the successful installation of the Extension. Below are the details of the custom Module created by the extension with in Zoho Desk.

- **Attach QBO Invoice :** Module

IMPORTANT NOTE:

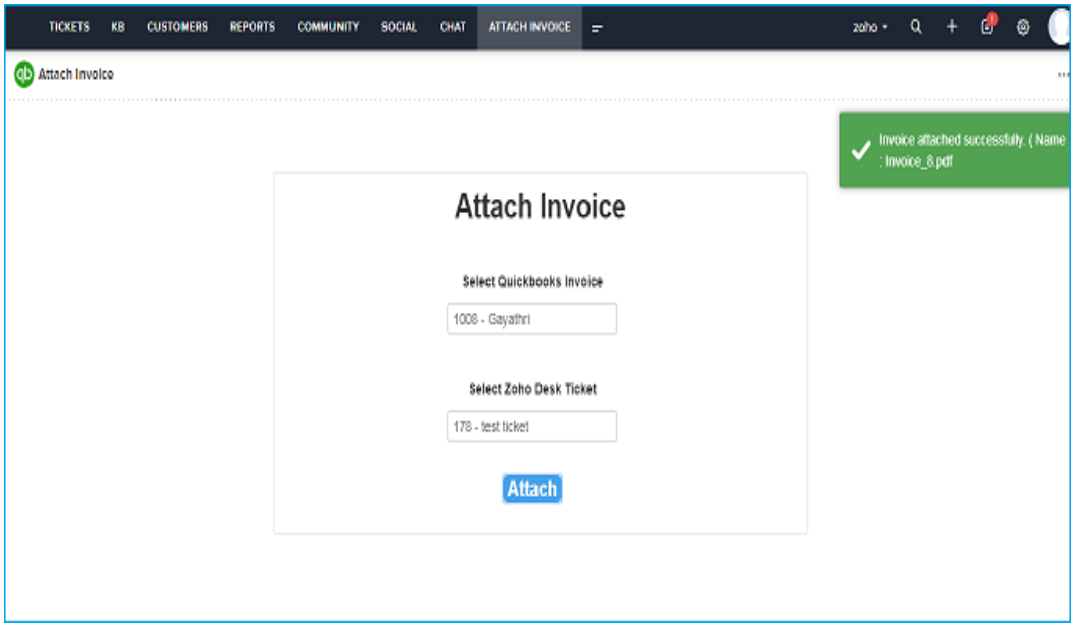
1. **Step to create Zoho desk Ticket attachment as Quickbooks Invoice from inside Ticket:**

   - 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.



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



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 zohosupport@tiaraconsulting.com or call us at **(925) 218 4080**.

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