Configuration

How do I setup Quickbooks in Envio?

Setup Tips

1. When adding the Billing Addresses, make the first line the name of the Company.
2. **Customer Name** is the code that will represent the partner in QuickBooks. It can be the full name of the Customer, or a short name. Each Trading Partner must have a unique name.
3. The **Chart of Accounts** is used for QuickBooks transactions.
4. Envio uses **Item List** to determine where monetary transactions will go inside QuickBooks. You must create an Item List for Envio transactions to post correctly in QuickBooks.
    - Only transactions coming from Envio require an entry on the **Item List.** You will have more Accounts than items.
5. If you have a spreadsheet of trading partners, contact support for assistance organizing the spreadsheet to import into QuickBooks.

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