

Implementation

Quickbooks Setup Tips

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

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