(1) Login into the application

To configure synchronization, login into the application with QuickBooks administrator account.

(2) Select the integration mode

Select one of the available integration modes: from QuickBooks to Bitrix24 or from Bitrix24 to QuickBooks. If a Company and Contact details or an Invoice are modified in the source system, the app will automatically make changes in the target system.

**From QuickBooks to Bitrix24**

Create an Invoice in QuickBooks from a Bitrix24 Contact, Company or a Deal.

Select a Contact, Company or a Deal from the list in Bitrix24 CRM, click on «Create invoice in QuickBooks» widget, select a product or a service in the window that will open, and switch to creation of an invoice in QuickBooks interface. A link to the Invoice will appear in QuickBooks, after the Invoice is saved in the additional field of a Bitrix24 Contact, Company or a Deal.

If the status of a QuickBooks Invoice changes to «Paid», the app will automatically change the status of the corresponding Invoice in Bitrix24 and will send a notification to a responsible manager.

**COMING SOON! From Bitrix24 to QuickBooks\***

Create an Invoice in Bitrix24 interface and the application will create the Invoice with the same details in QuickBooks. A link to the Invoice will appear in QuickBooks, after the Invoice is saved in the additional field of a Bitrix24 Contact, Company or a Deal.

If the status of a QuickBooks Invoice changes to «Paid», the app will automatically change the status of the corresponding Invoice in Bitrix24 and will send a notification to a responsible manager.

Attention! You will not be able to change the direction of synchronization after the initial sync of Invoices and Company and Contact details is complete. To change the direction of synchronization, please re-install the application.

\*Will be added in the next version

(3) Indicate addresses

Indicate, which fields Bitrix24 correspond to the payment address and delivery address.

(4) Select payment systems

Indicate which Bitrix24 payment systems you are using for contacts and companies.

(5) Indicate templates for details

Indicate which templates of Bitrix24 details you are using for contacts and companies.

(6) Launch synchronization

Launch synchronization and wait until the initial data exchange of Company and Contact details and Invoices between QuickBooks and Bitrix24 is completed. When the initial data exchange of Invoices, Company and Contact details is completed, you will receive a notification in Bitrix24.