



Tradogram is fully integrated with QuickBooks Online. In order to get it setup, you will need to contact support or your account manager to get it enabled on your account.

3 STEPS TO CONFIGURE THE SETUP:

STEP 1: Open the QuickBooks integration page on Tradogram from under “Manage Company” and click on the “Connect to QuickBooks” button. You will need to login to your QuickBooks account to get it synced.

STEP 2: Pick your settings for what type of data you want to be exchanged between the two systems. Make sure to pick a user to receive notifications for any errors.

STEP 3: Please read points below and make sure all the users on your account are aware of them.

PURCHASE ORDERS

- Make sure that the **purchase orders feature is enabled** on your Quickbooks account.
- **Purchase orders** on Tradogram get copied over to QuickBooks as **purchase orders**.
- **Cost fields** on purchase orders in Tradogram are copied over as **line items** on a purchase order in QuickBooks.

INVOICES

- **Invoice Records** on Tradogram get copied over to QuickBooks as **Bills**.
- **Cost fields** on invoice records in Tradogram are copied over as **line items** on a Bill in QuickBooks.

EXPENSES

- **Expense Records** on Tradogram get copied over to Quickbooks as **Bills**.
- **Cost fields** on expense records in Tradogram are copied over as **items** on a bill in QuickBooks.

OVERALL NOTES

- **Supplier name(s)** in Tradogram must match **vendor name(s)** in QuickBooks, it needs to be spelled the exact same way.
- **Multi-currency must be enabled** in QuickBooks in order to use other currencies. In QuickBooks the currency is associated with a vendor. It's recommended that you setup the default currency for every supplier on Tradogram.
- **Taxes** on purchase orders & invoice records in Tradogram **must match** (by name) a tax that has been setup on QuickBooks.
- **Payment Terms** in Tradogram must match the **Terms** used on QuickBooks by name. It's recommended that you setup the default payment terms for every supplier on Tradogram to avoid mistakes.
- **New items (and cost fields)** in Tradogram that get added as new items on Quickbooks will either use the **GL account chosen** on the item when added on Tradogram OR the **default expense account** selected on the setup page.



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