

QBO Connection Guide

Clients & Projects

Clients

QUIPA exports client information to QuickBooks when you create an estimate. QUIPA will search your Clients list in QuickBooks for an exact match of the **Display Name**. If a match is not found, a new client will be created in QuickBooks.

This is one reason why importing clients from QuickBooks on the **QuickBooks Connect** page is especially helpful — your display names will automatically match in both programs when you export an estimate.

After the initial import from QuickBooks to QUIPA, we recommend creating new clients directly in QUIPA. They will automatically export to QuickBooks when you export an estimate for that client (including all client account information such as email, address, etc.).

Projects

QuickBooks Online Plus and Advanced include the “Projects” feature which tracks profitability at a project level. If you don’t have QBO Plus or Advanced, or if you don’t use the Projects feature, this section may not apply to you.

If you are using QBO Projects, it is best practice to make sure that the Project name exactly matches the client or sub-client Display Name on QUIPA. When you export estimates from this client or sub-client in QUIPA, it will match to the Project in QuickBooks. You can do this by (1) creating a client or sub-client first on QBO and then converting it to a Project or (2) adjusting your client or sub-client Display Name in QUIPA to make sure it matches the Project in QuickBooks.

Chart of Accounts

A **Sales of Product Income** account will be automatically created in your QuickBooks account upon your first QuickBooks export if it does not already exist. Products exported from QUIPA (Fabrication, Fabrics & Trims, Linings, Hardware) will be attributed to this account.

A **Services Income** account will be automatically created in your QuickBooks account upon your first QuickBooks export if it does not already exist. Products exported from QUIPA (Fees such as Measure, Consult, Install, and any other Fees created in My Shop) will be attributed to this account.

A **Shipping & Handling** account will be automatically created in your QuickBooks account upon your first QuickBooks export if it does not already exist.

You can easily retroactively map Products and Services (e.g., *Drapery*, *Roman Shade*, *Fabrics & Trims*) to a different account if you want them attributed differently. Going forward, line items on new estimates will be assigned to the updated account.

Sales Tax

QUIPA exports all products and services as taxable on the estimate (see the “Tax” column), but QuickBooks handles all tax calculations.

Please ensure your clients in QuickBooks are correctly marked as **exempt** or **non-exempt**. If a client is marked as exempt, the calculated sales tax will be \$0 even when the tax box is checked on the estimate.

We recommend validating the sales tax rate assigned to each client, as well as the tax status of each item on estimates and invoices.

Products and Services

QUIPA exports Fabrication Items, Fees, and Products to QuickBooks when you create an estimate. QUIPA will search your Products/Services list for an exact name match; if none is found, a new Product/Service item will be created in QuickBooks.

You may (1) **rename your existing QuickBooks products/services** to match QUIPA exports, so all items retain their category and general ledger account; or (2) keep your existing names, and allow QUIPA to generate new products/services as detailed below (by default: uncategorized and mapped to “Sales of Product Income”). **Option 1** is recommended, though both options allow plenty of flexibility for running reports.

You can always change the category or general ledger account even if the Product/Service was imported from QUIPA.

Fabrication Items

- Bed Skirt
- Cornice
- Coverlet
- Cushion
- Drapery
- Duvet
- Pillow

- Roller Shade
- Roman Shade
- Sham
- Table Skirt
- Upholstery
- Valance
- Woven Shade
- Other

Fees

- Consult
- Install
- Measure
- Any additional fee you add in **My Shop**

Products

- Blinds
- Fabrics & Trims
- Hardware
- Headrail
- Linings
- Miscellaneous
- Pillow and Cushion Inserts
- Roller Shades
- Shutters
- Workroom Supplies
- Woven Shades
- Any component you manually add to an item (Summary tab of an item → scroll down to **Components Needed**)
- Any “Category” you manually add in a Purchased Goods item

Bundling

If you have QBO Plus or Advanced, you can export items as Bundles. For Draperies, Roman Shades, and other fabricated items, you can bundle any of the following items:

1. Main Fabric

2. Lining Materials
3. Embellishment Fabric (trim, etc)
4. Fees
5. Hardware (drapery)/Headrail (/Pillow and Cushion Inserts/Parts & Supplies
6. Shipping & Handling

QUIPA allows you to set up your default bundling settings in My Shop, but you have the freedom to change your bundling preferences on each order.

Reports

QBO offers plenty of flexibility for creating Estimates. Please contact us if you would like to discuss specific questions about reports.

Revisions to Estimates

We recommend making revisions in QUIPA (e.g., changing fabric, adding hardware, etc.) and exporting a new estimate for each version — rather than editing an existing estimate in QuickBooks.

Any changes made in QUIPA will automatically update yardage, pricing, work orders, and the project management system — QUIPA should be your **source of truth** for all project details.

Changes made directly in QuickBooks will **not** be reflected on the next estimate exported from QUIPA.

You can access your estimates directly through hyperlinks in QUIPA.