

QUIPA - QuickBooks Connection Guide

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 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 name will automatically match in both programs when you export an estimate.

Moving forward, you can create new clients in QUIPA and they will export to QuickBooks automatically when you export an estimate for that client (includes client account information: email, address, etc).

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 items an exact match; if a match is not found, a new product/service will be created.

Renaming your QuickBooks products/services to match QUIPA exports can be a good idea so that all of your items remain in the correct category and chart of accounts, and you will not have two entries for the same item on reports.

Fabrication Items

- Bed Skirt
- Cornice
- Coverlet
- Cushion
- Drapery
- Duvet
- Pillow
- Roller Shade
- Roman Shade
- Table Skirt

- Upholstery
- Valance
- Woven Shade
- Other

Fees

- Consult
- Install
- Measure
- Anything else you add in My Shop

Products

- Hardware
- Headrail
- Fabrics & Trims
- Any component you manually add to an item (Summary tab of an item > scroll down to Components Needed)
- Note that QUIPA includes Lining/Interlining price in fabrication, so our exports do not include separate Lining/Interlining items