

3/10/2018

GUIDE



QuickBooks Integration for GoldMine

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1. Introduction

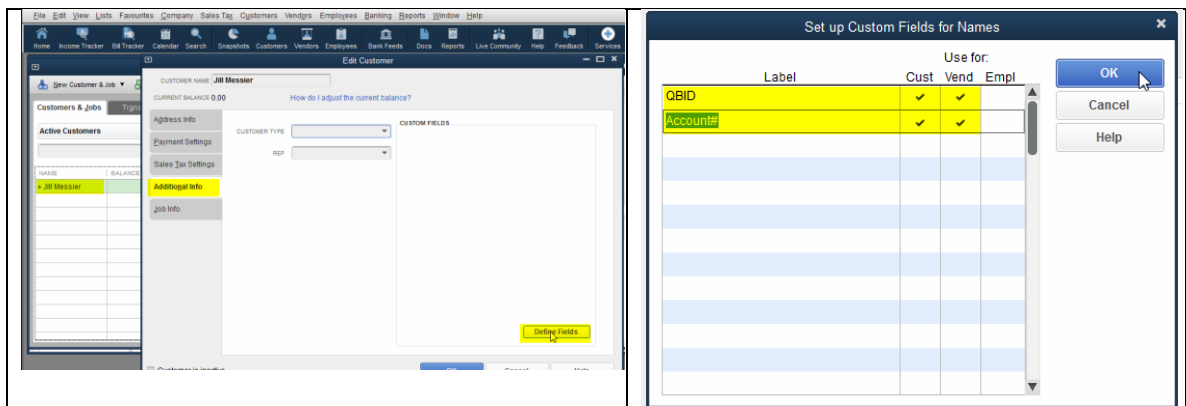
1.1 QuickBooks Integration for GoldMine

qbGold provide GoldMine users with visibility of QuickBooks transactions like Quotes, Sales Orders and even Invoices, if required. It will also allow an authorized Administrator to add a Client record from GoldMine to QuickBooks to save on duplication of data entry. **qbGold** will also synchronize all records from **QuickBooks** to GoldMine on a regular basis (automatically).

2. Prep Work Prior to Installing qbGold

2.1 Configure Fields in QuickBooks

1. Go to **QuickBooks**
2. Open Customer Module
3. Double click on any customer
4. Go to Additional Info
5. Select Define Field button
6. Select a blank field and type QBID
7. Select another blank field and type Account Number
8. Select all checkboxes for customer (Cust) and Vendor (Vend)
9. Select OK.



2.2 Configure Fields in GoldMine

1. Create the following fields in GoldMine exactly as noted below:

QuickBooks ID - (UQBID) – Character - Length 20
QuickBooks List ID - (UQBLISTID) – Character - Length 25
QuickBooks Edit Sequence - (UQBEDITSEQ) - Character - Length 15
QuickBooks Link Status (UQBSTATUS) - Character - Length 5

Note: Please hide all fields except **QuickBooks ID (UQBID)**. The GoldMine Users cannot update these fields.

To Lock down these field, select (Field Properties > Security > Field Access > Update Right > (MASTER)).

2.3 Create a qbGold User in GoldMine

1. Go to Goldmine, Tools, User Settings, New and create a new User called **QBGold**.

2.4 GM License, Windows Updates & SQL

1. Get the GM License Number without the code and send it to The Trainer's Advisory Network Ltd so a license can be created for qbGold prior to installation.
2. Make sure all Windows Updates are done for Net Framework as you need 4.6 installed.
3. Know the SQL username and password. You will need it for the installation.

2.5 GoldMine qbGold User & New Fields

1. Create a new User in GoldMine called QBGOLD. You must have Master rights to do this.
2. Add new Fields to GoldMine as noted below:

| | | | |
|------------|-----------|-----------|------------------|
| UQBID | character | length 20 | QBID |
| UQBLISTID | character | length 25 | QB List ID |
| UQBEDITSEQ | character | length 15 | QB Edit Sequence |
| UQBSTATUS | character | length 5 | QB Link Status |

Note: please hide all fields except UQBID or lock them down so Users cannot update them (Field Properties > Security > Field Access > Update Rights > Master)

3. Make a note of the field in GoldMine that describes the type of contact. Usually the Record Type (Key1) outlines whether the record is a Customer or a Vendor.
4. Once the Install is completed, follow instructions for creating a new Taskbar in GoldMine called qbGold.

3. Installation

3.1 Installation Scenarios

Installing **qbGold** on a workstation



qbGold can be installed on a network workstation or on a stand-alone laptop. GoldMine and **QuickBooks** must be installed on the same computer.

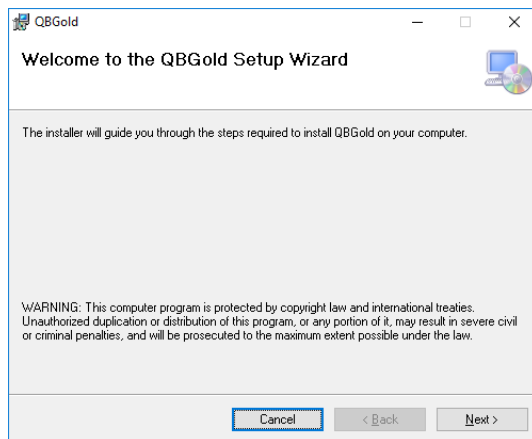
Installing **qbGold** on a server

qbGold can be installed on a server, such as a terminal server or Citrix server. GoldMine and **QuickBooks** must be installed on the server as well.

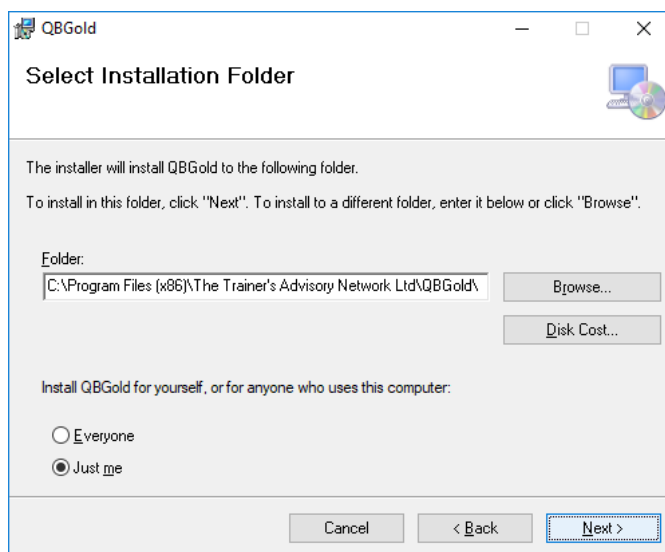
3.2 Installing qbGold

1. Download the **qbGold** installer file from the location provided to you by The Trainer's. Locate the downloaded installer file and select **<Run As Administrator>**.

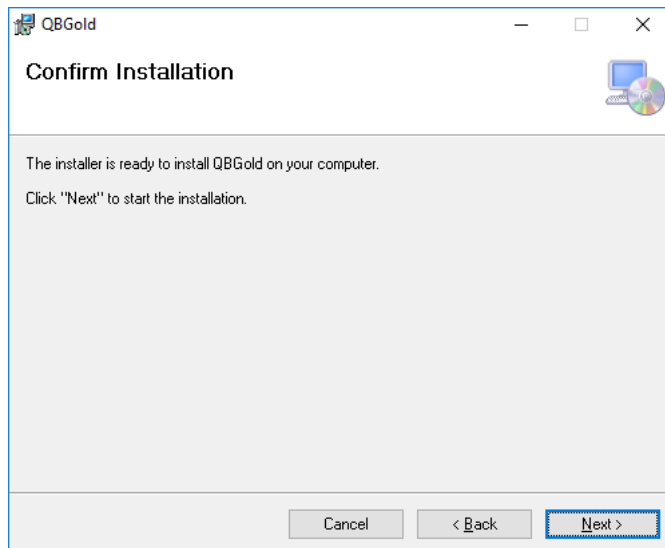
| Name | Date modified | Type | Size |
|--|--------------------|-----------------------|--------|
|  QBGold Setup | 2017-08-18 2:29 PM | Windows Installer ... | 869 KB |
|  setup | 2017-08-18 2:29 PM | Application | 773 KB |



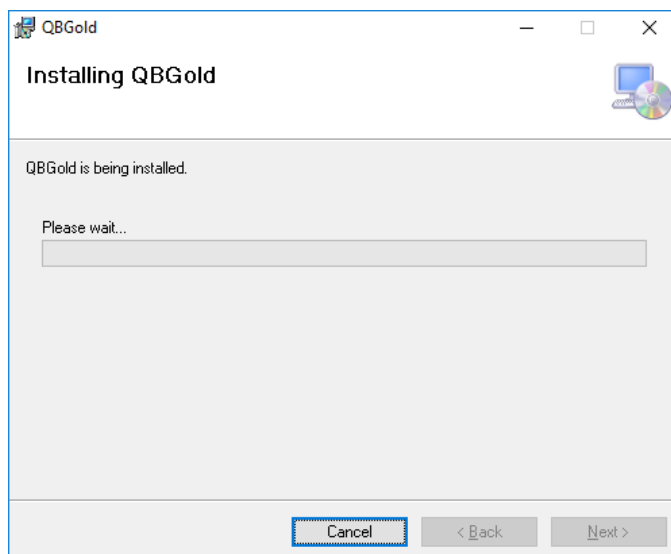
2. Click on **<Next>**.
3. Browse for the location to install **qbGold** based on the location you placed **qbGold** Setup file.



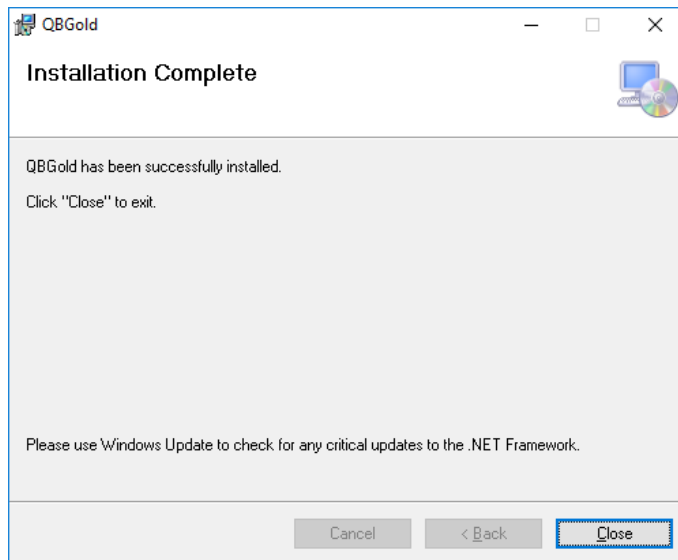
4. Click on **<Next>**.



5. Click on **<Next>**.



6. Click on **<Next>**.



qbGold will be installed. This might take several minutes.

7. Select **<Finish>**.

3.3 Activate qbGold License

When opening **qbGold**, it will check to see if there is a valid license. It can be used on a trial or demo basis for 30 days and then will stop working. *Please contact The Trainer's for a valid license code @ 905 820 1041.*

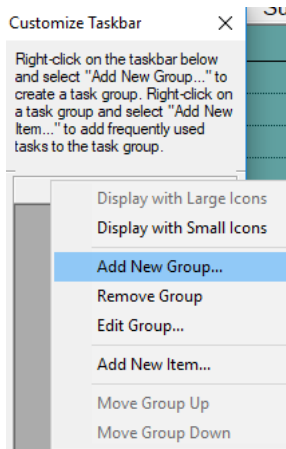
3.4 Add a taskbar shortcut to GoldMine

Add a GoldMine taskbar shortcut to launch the **qbGold** application. GoldMine must always be running to launch **qbGold**.

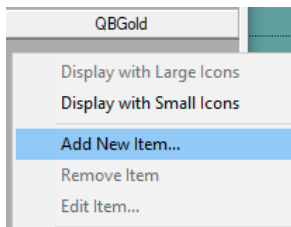
1. On the GoldMine Premium Toolbar, selection the triangle beside Options, click on **<Customize>**.



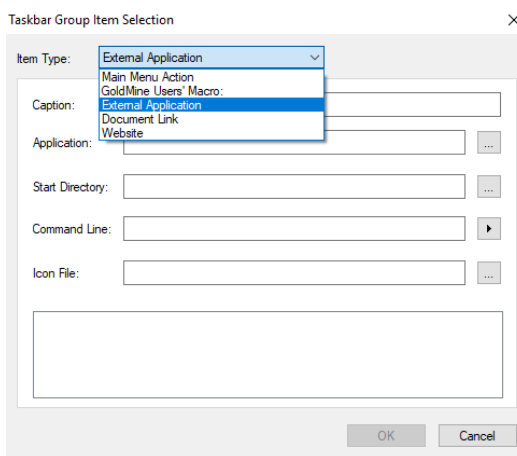
2. Right Click in the taskbar and select **<Add New Group>** and call it **qbGold**.



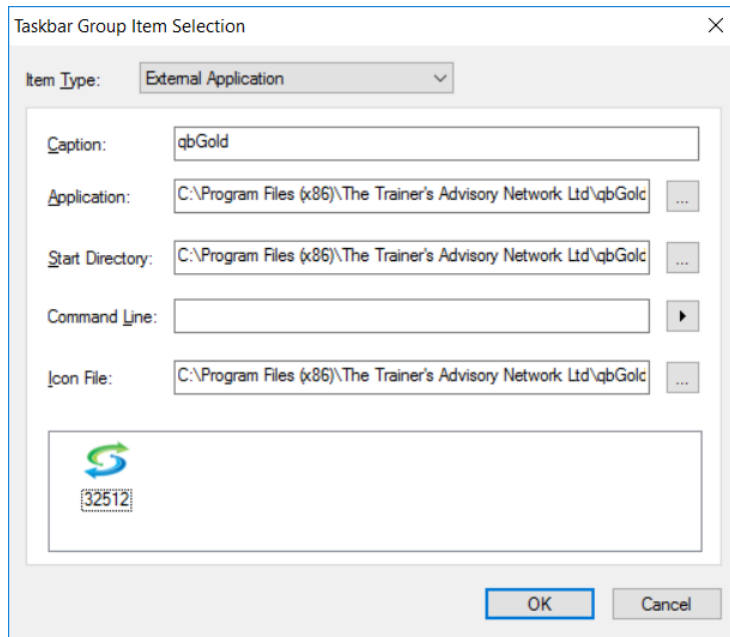
3. Right click in the new taskbar **qbGold** and select **<Add New Item>**.



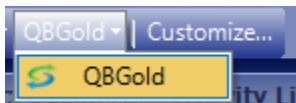
4. From here, the instructions are the same for both versions. Select the type of shortcut, in this case, **<External Application>**.



5. Browse to locate **qbGold.exe**. The default location is used in the location below but could be different if another path was selected during installation.



6. Click <OK> and close the taskbar customization.
7. Click on the shortcut to open **qbGold**.



4. Configure **qbGold** SQL Connection

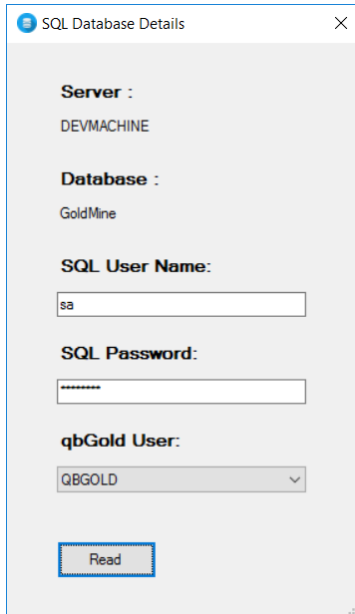
The first time you open **qbGold**, you will be prompted for connection information. You will need elevated privileges to be able to write this information from the registry. Open GoldMine and **QuickBooks**, and then run **qbGold**.

Reminder: Make sure you open **QuickBooks** and the Company file before launching **qbGold**.

qbGold will be located in

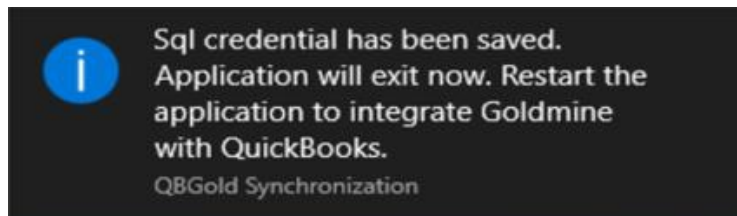
C:\Program Files (x86)\The Trainer's Advisory Network Ltd.\qbGold\qbGold.exe

1. Enter the SQL User Name: sa and the SQL Password: ????. Select the **QBGOLD** User from the dropdown. Select Read.

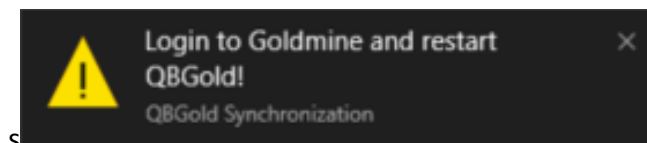


The screenshot shows a dialog box titled "SQL Database Details" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Server :** DEVMACHINE
- Database :** GoldMine
- SQL User Name:** A text input field containing "sa".
- SQL Password:** A text input field containing "????".
- qbGold User:** A dropdown menu with "QBGOLD" selected.
- Read** button: A button at the bottom of the dialog.



Note: If GoldMine and/or **QuickBooks** is closed, you will get the following message in the bottom right corner of your screen.



2. Log into GoldMine and open **qbGold**.





5. Configure qbGold Home

The Home Tab contains 3 components:

5.1 The Intuit QuickBooks Status and the GoldMine Status

qbGold will let you know that you are connected and that you can have qbGold Update Status when it launches qbGold if desired. It will indicate how many Contacts, Vendors, Estimates and Sales Orders that are Linked in QuickBooks and Contacts Vendors and Linked Records in GoldMine.

1. To Manually Update Statistics, select the Update Statistics button.

| QuickBook Statistics | GoldMine Statistics |
|---|---|
|  Status: Connected  Last Updated: <input type="checkbox"/> Enable Auto Update Statistics QuickBooks Statistics <hr/> Contacts: Vendors: Estimates: Sales Orders: |  Status: Connected  Last Updated: <input type="checkbox"/> Enable Auto Update Statistics GoldMine Statistics <hr/> Contacts: Vendors: Linked Records: |

5.2 Synchronize Rules

Creating Rules are easy and a great way to control the way your contacts Synch and link between GoldMine and QuickBooks. The GoldMine User defined field UCUSTNUM links to the Quickbooks Customer Number.

5.2.1 Creating A Rule

1. Select the Add New Rule button
2. For the IF statement select one of the GoldMine fields from the dropdown list.
3. For the IS statement select the operator from the dropdown list such as Equal to.
4. For the TO statement, select one of the QuickBook fields from the dropdown list such as QB.EMAIL
5. Define your Rule Name: i.e. Matching Emails

6. Select Create Rule.

Rule Name

☐ Matching Email Address
☒ Customer Number

Creating rules are easy, and a great way to control the way your contacts synchronizes and link between Goldmine and QuickBooks

IF UCUSTNUM (C2.UCUSTNUM) **IS** Equal to **TO** QB.CUSTOMER NUMBER

Rule Name
Customer Number

GoldMine Contact

Company: A PC
Contact: Nell Hensley
Address1: 587-4844 Duis St.
Address2:
City: Metairie

Cancel Rule Create Rule

Best recommendation is: Email(CONSUP.CONTSUPREF) = QB.EMAIL

You may decide to use Account# or Contact Name or Postal Code. These may not assist you to match the records to GoldMine or **QuickBooks** as a unique match. You must think about using something that is unique and will not give you numerous matches.

An Example: If two records in **QuickBooks** have the same address or postal code, then there will be numerous matches from **QuickBooks** to GoldMine.

5.3 Adding a GoldMine Contact to a QuickBooks Contact

This can be a real-time saver if you don't want to do double entries. Make sure the Settings are setup properly before accessing the Add to QuickBooks button. See section 5.2 Configuring the GoldMine Fields.

GoldMine Contact

Company: A PC
Contact: Nell Hensley
Address1: 587-4844 Duis St.
Address2:
City: Metairie
State: LA
Zip: 55802
Country: United States
Email: cursus.luctus@Quisaretortor.ca

QuickBooks Contact

Company: A PC
Contact: Nell Hensley
Address1: 587-4844 Duis St.
Address2:
City: Metairie
State: LA
Zip: 55802
Country:
Email: cursus.luctus@Quisaretortor.ca

Save Unlink Add to QuickBooks

Start Sync

6. Configure qbGold Settings

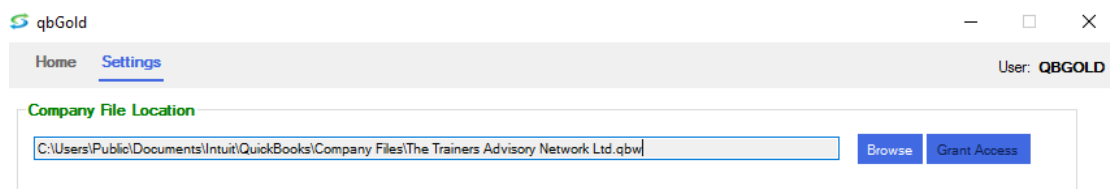
6.1 Configure the QuickBooks Company File

1. Browse for the Company File Location from **QuickBooks**.

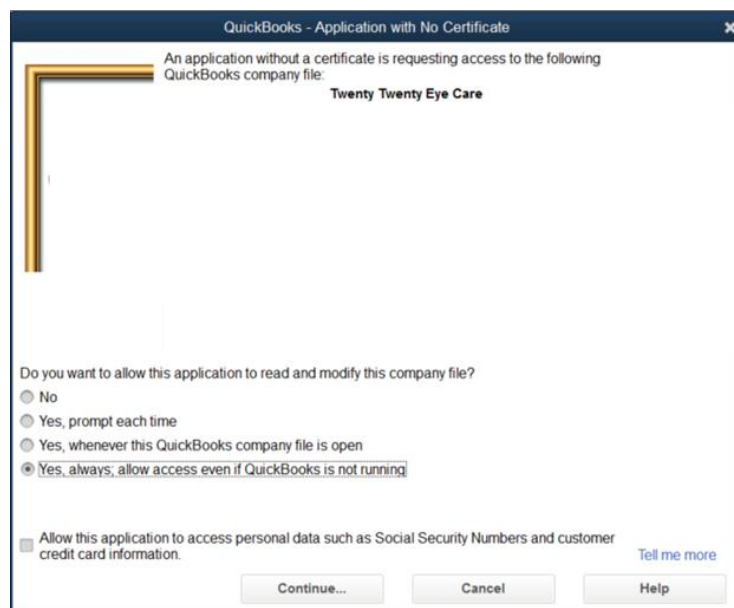
Company File Location: This is on the Setup tab in **qbGold**, listed under **QuickBooks** Setup. The Company file location will point to your **QuickBooks** accounting database file.

(Note: All **qbGold** users must use the same path Either a mapped drive or a UNC path is acceptable, as long as all users open **QuickBooks** using the SAME path to the company file.)

2. Click on **<Browse>** to browse to the **QuickBooks** company file location. Navigate to the company file and select the appropriate **QuickBooks** company file (i.e. *.qbw). Click **<Open.>**



3. Select Grant Access
 - a. Select Yes, always allow access even if **QuickBooks** is not running.
 - b. Click **<Continue>** to begin using **qbGold**.



Note: If **QuickBooks** is not already open, open it now and log in. When **qbGold** attempts to access **QuickBooks**, you'll be prompted to grant access.

This can be done after the fact from the Settings Tab in **qbGold**. The Grant Access button will not be grayed out if you have not granted privileges already and have sufficient permissions in **QuickBooks**.

6.2 Configure the GoldMine Fields

The Fields are located at the bottom of the screen and will connect to **QuickBooks** Fields.

Goldmine and **QuickBooks** refer to record type as Customers and/or Vendors. You will be customizing the settings to select the matching record type between both programs.

1. If the Field – Record Type = Key1 (C1.KEY1) or the field that defined the Record Type.
2. Is Equal to – Customer Type
3. Is Equal to – Vendor Type

The screenshot shows the qbGold application window with the 'Settings' tab selected. The 'Company File Location' is set to 'C:\Users\Public\Documents\Intuit\QuickBooks\Company Files\The Trainers Advisory Network Ltd.qbw'. Below this, there are tabs for 'Customer Synchronization', 'Vendor Synchronization', and 'Synchronization'. The 'Contact Fields' tab is active, showing a table mapping QuickBooks fields to GoldMine fields. The 'GoldMine Setup' section at the bottom allows configuring the record type for the 'KEY1 (C1.KEY1)' field, with options for 'Customer' and 'Vendor'.

| QuickBooks | GoldMine |
|--------------|------------------------|
| CustomerName | COMPANY (C1.COMPANY) |
| Address1 | ADDRESS1 (C1.ADDRESS1) |
| Address2 | ADDRESS2 (C1.ADDRESS2) |
| Address3 | Not Mapped |
| Address4 | Not Mapped |
| Phone | Not Mapped |
| AltPhone | Not Mapped |
| Fax | Not Mapped |

GoldMine Setup

If The Field: KEY1 (C1.KEY1) ▼

Is Equals To: Customer Default Link As Customer

Is Equals To: Vendor Default Link As Vendor

Buttons: Save as Default, Reset Settings

Note: The Save as Default button will only enable once all four fields are filled in.

4. Select the Save as Default button.

6.3 Customer Synchronization

6.3.1 Customer Transactions

The transactions that will be added to GoldMine History can be specified here. Checkmark the transactions that will be synchronized. For **QuickBooks** Estimates and **QuickBooks** Sales Orders, select whether the transaction should be added to GoldMine as a Pending Sale or a Completed Sale.

| | From Date | To Date | Activity Code | Result Code |
|--|------------|------------|---------------|-------------|
| <input checked="" type="checkbox"/> QuickBooks Estimates | 11/20/2017 | 11/20/2017 | EST | |
| <input checked="" type="checkbox"/> QuickBooks Sales Orders | 11/20/2017 | 11/20/2017 | QSO | |
| <input checked="" type="checkbox"/> QuickBooks Invoices As Completed Sales | 2/ 1/2017 | 11/20/2017 | | |
| <input type="checkbox"/> QuickBooks Sales Receipts As Completed Sales | | | | |
| <input type="checkbox"/> QuickBooks Credit Memos As Completed Sales | | | | |
| <input type="checkbox"/> QuickBooks Receive Payments As Completed Sales | | | | |
| <input type="checkbox"/> QuickBooks General Journals As Completed Sales | | | | |

6.4 Vendor Synchronization

6.4.1 Vendor Transactions

The transactions that will be added to GoldMine History can be specified here. Checkmark the transactions that will be synchronized. Activity codes and result codes can be used if desired for quick identification of transactions synchronized from **QuickBooks**.

| | From Date | To Date | Activity Code | Result Code |
|---|------------|------------|---------------|-------------|
| <input checked="" type="checkbox"/> QuickBooks Purchase Orders As Completed Sales | 11/20/2017 | 11/20/2017 | | |
| <input type="checkbox"/> QuickBooks Checks As Completed Sales | | | | |
| <input type="checkbox"/> QuickBooks Payments As Completed Sales | | | | |
| <input type="checkbox"/> QuickBooks General Journals As Completed Sales | | | | |

6.5 Auto Synchronization

Auto Synchronization will sync Estimates, Sales Orders, Invoices and Purchase Orders into GoldMine into the Pending or History Tab. There are options available to select based on your requirements.

The screenshot shows the 'Synchronization' tab of a settings window. It contains two sections: 'Auto Synchronization' and 'Sync Timer'. In the 'Auto Synchronization' section, the 'Synchronize every' option is selected with a radio button, and the interval is set to '30 minutes' in a dropdown menu. Other options include 'Synchronize once each day at' (set to 12:00:00 AM), 'Synchronize when the computer is started', and 'Synchronize Manually'. The 'Sync Timer' section has the 'Synchronize only between these times' option selected. The start time is set to 8:00:00 AM and the end time is set to 6:00:00 PM.

Customer Synchronization Vendor Synchronization Synchronization

Auto Synchronization

☐ Synchronize once each day at 12:00:00 AM

☒ Synchronize every 30 minutes

☐ Synchronize when the computer is started

☐ Synchronize Manually

Sync Timer

☐ Always Synchronize

☒ Synchronize only between these times

Start 8:00:00 AM End 6:00:00 PM

Note: If you do not want one particular transaction to be synced then you must check that item from Transaction Tab for Customers or Vendors.

If Synchronize once each day or Synchronize every x minute is selected, the qbGold icon will go to the system tray for syncing. If qbGold closes, you can right click qbGold Setup

Save as Default

Always update your changes with **Save as Default** throughout qbGold Settings.

7. The Synchronization Process

The Sync Process is taking your GoldMine record based on Sync Rules and Record Type and Linking with a QuickBook Record. The Sync process is applying the same random number to the field in GoldMine called UQBID and to the field in **QuickBooks**, called QBID based on the Sync Rule.

Completing this Process causes both GoldMine and **QuickBooks** to have a unique identifier that links the records together. Once they are linked, when a Sales Manager/Rep completes a Transaction like an Estimate and/or Sales Order or the Purchasing Manager completes a Purchase Order, the details of each transaction will be stored in either the Pending or History Tab of GoldMine. The Accounting Department may complete an Invoice that will also be tracked in the History Tab of GoldMine.

After transaction synchronization, the items will be displayed in the GoldMine History tab as seen below.

The screenshot displays the GoldMine Premium Edition interface. The top menu bar includes File, Edit, Go To, Tools, Actions, Schedule, Complete, Web, Window, and Help. Below the menu is a toolbar with icons for New Record, Search, Reports, Documents, Sale, Appointment, E-mail, Get Mail, Dial, Message, Timer, Options, and a status bar showing 'Getting Started - qbGold - Customize...'. The main window is titled 'Contact > Randall Noel' and contains a 'Next Activity' section with fields for Company, Contact, Last, Prefix, Dept, Title, Source, Record Type, and Industry. The 'Last Activity' section shows Phone 1, Phone 2, Phone 3, Fax, E-mail, Web Site, Interest, and Acct Mgr. The 'Last Note' section displays Address, City, State, Postal Code, Country, Open, Merge, and QuickBooks ID. The 'History' tab is selected, showing a table of transactions. The table has columns for Date, Time, Contact, User, Activity, Result, and Reference. The first two rows show transactions from 10/17/2017 at 4:19 am, one for QBGOLD (QB...Sale) with result INV and amount \$625.62, and another for QBGOLD (QB...Sale) with result QSO and amount \$625.62. The 'Preview' section on the right shows details for the selected transaction, including Contact, Company, Assigned, Creation, Completion or Last Update, Product, Code, Success, and Notes. A table at the bottom of the preview shows a list of items with columns for Description, Quantity, Rate, Svc.Date, and QB Tax Code.

| Date | Time | Contact | User | Activity | Result | Reference |
|------------|---------|-------------------|------|----------|----------------------|-----------|
| 10/17/2017 | 4:19 am | QBGOLD (QB...Sale | | INV | \$625.62 - Invoic... | |
| 10/17/2017 | 4:19 am | QBGOLD (QB...Sale | | QSO | \$625.62 - Sales ... | |

| Description | Quantity | Rate | Svc.Date | QB Tax Code |
|-------------------------------|----------|--------|------------|-------------|
| Xyz | 1 | 75.00 | 10/18/2017 | G |
| Hockey Sticks | 0 | 0.00 | 10/18/2017 | S |
| Work out with Pro Hockey Star | 0 | 399.00 | 10/18/2017 | S |
| Silver Cup | 0 | 84.95 | 10/18/2017 | S |

7.1 Manual Sync

Manual Sync is linking **QuickBooks** and GoldMine existing records as well as updating transactions such as Purchase Order, Sales Order and Estimates.

1. Go to Settings Tab and ensure GoldMine Fields are correctly set.
2. Ensure the Synchronization Rule have been selected.
3. Start Sync

The screenshot displays the qbGold application interface. At the top, there's a navigation bar with 'Home' and 'Settings' tabs, and a user profile 'User: QBGOLD'. The main content area is divided into two sections. The top section, titled 'Synchronize Rules', features a list of rules with columns for 'Rule Name', 'Matching Email Address', and 'Customer Number'. A 'Add New Rule' button is located in the top right of this section. The bottom section, titled 'GoldMine Contact', shows a comparison between 'GoldMine Contact' and 'QuickBooks Contact' fields. Fields include Company, Contact, Address1, Address2, City, State, Zip, Country, and Email. Each field has a left arrow, a right arrow, and a central button. Below the comparison table are 'Save', 'Unlink', and 'Add to QuickBooks' buttons. On the left side of the interface, there are sidebars for 'intuit quickbooks' and 'GoldMine', both showing 'Status: Connected' and 'Update Statistics' buttons. The bottom of the interface shows 'Last Sync: 11/20/2017 10:20 AM' and a 'Start Sync' button.

Note: You can make multiple Rules. You may Sync more than once based on different Sync Rules created. The Record Type in the new Rule as well as the change to the GoldMine Field (Is Equal To) will Sync the records that did not get Synched the first time. See 6.1 to Create a New Rule.

Note: If the Sync Rule is not correct, it may link inappropriate records.

7.2 Validating Data

1. Once the Sync is done, the GoldMine Contact and the **QuickBooks** Contact fields will be filled in. If there is any discrepancy between the information, it will be highlighted in pink.

2. Use the arrows to update information from GoldMine or **QuickBooks** or **QuickBooks** to GoldMine. When the changes have been selected, click the Save button.

| GoldMine Contact | | QuickBooks Contact | | |
|------------------|-----------------------------|--------------------|---|-----------------------------|
| Company: | Phaselus Dolor Incorporated | < | > | Phaselus Dolor Incorporated |
| Contact: | Alden Morgan | < | > | Alden Morgan |
| Address1: | 4433 Dapibus Road | < | > | 4433 Dapibus Road |
| Address2: | 1234 | < | > | |
| City: | Carbonear | < | > | Carbonear |
| State: | NL | < | > | NL |
| Zip: | A8C 3M7 | < | > | A8C 3M7 |
| Country: | Canada | < | > | Canada |
| Email: | tempus@Morbisitt.edu | < | > | tempus@Morbisitt.edu |
| Save | | Unlink | | Add to QuickBooks |

3. To get to the next GoldMine record to Validate the information, Tile **QuickBooks** and GoldMine as noted below for easy access to additional contact records using the arrow buttons in GoldMine.

oldMine Premium Edition - [Alden Morgan]

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Next Activity : 11/1/2017 1:20 am Last Activity : 11/1/2017 1:20 am Last Note :

Company: Phaselus Dolor Incorporated Phone1: (406)943-8379 Ext: QB ID: QuickBooks Int
Contact: Alden Morgan Phone2: Ext: QB List ID:
Dept: Last: Morgan Phone3: Ext: QB Edit Sequence:
Title: Dear: FAX: (150)552-5286 Ext: QB Status:
Source: Ast: E-mail: tempus@Morbisitt.edu Web Site:

Address: 4433 Dapibus Road Record Type: Customer
City: Carbonear Industry:
State: NL Interest:
Zip: A8C 3M7 Acct Manager: Customer Number:

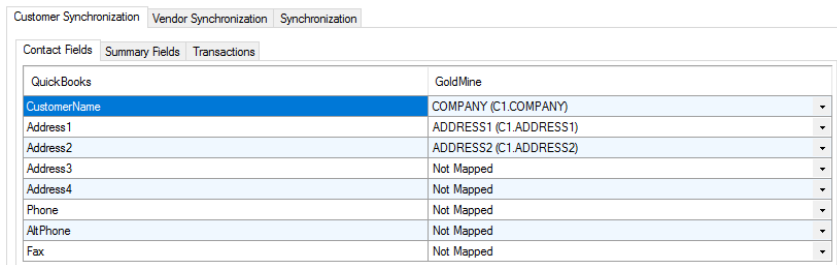
| GoldMine Contact | | QuickBooks Contact | | |
|------------------|-----------------------------|--------------------|---|-----------------------------|
| Company: | Phaselus Dolor Incorporated | < | > | Phaselus Dolor Incorporated |
| Contact: | Alden Morgan | < | > | Alden Morgan |
| Address1: | 4433 Dapibus Road | < | > | 4433 Dapibus Road |
| Address2: | 1234 | < | > | |
| City: | Carbonear | < | > | Carbonear |
| State: | NL | < | > | NL |
| Zip: | A8C 3M7 | < | > | A8C 3M7 |
| Country: | Canada | < | > | Canada |
| Email: | tempus@Morbisitt.edu | < | > | tempus@Morbisitt.edu |
| Save | | Unlink | | Add to QuickBooks |

Start Sync

7.3 Adding a Single GoldMine Record to QuickBooks

The Administrator has the right to add a GoldMine record into **QuickBooks**.

Some settings may be configured from the Settings page of **qbGold**. You may need to sync a little differently based on the GoldMine record. Here you can decide what GoldMine fields you need to match in **QuickBooks** and make the changes.



| QuickBooks | GoldMine |
|--------------|------------------------|
| CustomerName | COMPANY (C1.COMPANY) |
| Address1 | ADDRESS1 (C1.ADDRESS1) |
| Address2 | ADDRESS2 (C1.ADDRESS2) |
| Address3 | Not Mapped |
| Address4 | Not Mapped |
| Phone | Not Mapped |
| AltPhone | Not Mapped |
| Fax | Not Mapped |

Example: The Phone1 field found in GoldMine could be updated in **QuickBooks** in their field called AltPhoneField. It is your choice.

Select **Settings > Customer Synchronization Tab > Contact Fields Tab**. You may want to update the Vendor information. Select **Settings > Vendor Synchronization Tab > Contact Fields Tab**.

Make the following changes:

1. Find the record to add to **QuickBooks** from GoldMine.
2. Once the record is in the GoldMine Contact text box in **qbGold**, select the Add to **QuickBooks** button.
3. Go to **QuickBooks** and check to see if the new GoldMine field is now located in **QuickBooks** under that record.

Note: The New record in **QuickBooks** will automatically be linked based on Record Type which is allocated as Customer or Vendor.

7.4 Linking Existing Records

qbGold may find a match in QuickBooks. You can decide to link it with the existing record.



qbGold has found match to the following record "The Trainer's Advisory Network Ltd." in QuickBooks. Would you like to link it with the existing record?

| | Customer/Vendor Name | Company Name | Full Name | GoldMine Type |
|-------------------------------------|----------------------|-------------------------------------|---------------|---------------|
| <input checked="" type="checkbox"/> | Maycee H. Wilson | The Trainer's Advisory Network Ltd | | Customer |
| <input type="checkbox"/> | Maycee Wilson | The Trainer's Advisory Network Ltd. | Maycee Wilson | Customer |

7.5 Unlink Records

When a record from **QuickBooks** should not be linked to GoldMine, select the Unlink button. Future Syncs will not synchronize any transactions of this record.

8. Additional Information

8.1 Contact Information



The Trainer's Advisory Network Ltd.
3-3055 Dundas Street West, Suite 102
Mississauga, ON L5L 3R8

Phone: 905.820.1041

Fax: 905.569.7307

Contact: Bill Wilson, President

Website: www.thetrainers.ca

For Technical Assistance
Contact Your **qbGold** Partner
Email support@thetrainers.ca