

COMMERCIAL COATINGS

ADJUSTRITE TRAINING



ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

AdjustRite is now able to sync to Quickbooks online.

The feature will allow you to:

- Sync AdjustRite to Quickbooks online
- Choose one or multiple facilities to link Quickbooks account(s)
 - Import customer data to AdjustRite
- Manage Quickbooks customers in AdjustRite
 - Sync accounting codes between systems
 - Send invoices to Quickbooks



ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

Step 1 – Connect AdjustRite to Quickbooks Online



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The screenshot shows the AdjustRite web application interface. At the top left is the AdjustRite logo. The top right corner displays the user name 'Doug Orr - AdjustRite Commercial Solutions' and a 'Logout' link. Below this are three notification boxes: 'System Updates' with a red '0' badge, 'Model Updates' with a yellow '0' badge, and 'Alerts' with a blue '2' badge. A horizontal navigation bar contains the following items: Home, Estimate, Maintenance, Reports, Administration, and Help. The 'Administration' menu is expanded, showing a list of options: Profile Management, Change Password, Company Management, Company Reports, Vehicle Type Management, Buy/Renew Adjustrite, Users, Accounting, and Import. The 'Accounting' option is highlighted, and its sub-menu is visible, containing 'Manage Items', 'Manage Accounting Exports', 'QuickBooks Online Connection', and 'QuickBooks Desktop Connection'. The 'QuickBooks Online Connection' option is highlighted with a blue border. In the center of the main content area, there are two blue buttons: 'Connect Adjustrite with QuickBooks Online' and 'Import/Sync Customers'. Below these buttons is a link for 'Terms of Use'.

First choose Quickbooks Online Connection from the Administration > Accounting menu.

ADJUSTRITE - QUICKBOOKS ONLINE INTEGRATION

The screenshot shows the AdjustRite web application interface. At the top right, it displays the user name 'Doug Orr - AdjustRite Commercial Solutions' and a 'Logout' link. Below this are three notification buttons: 'System Updates' with a red '0' badge, 'Model Updates' with a yellow '0' badge, and 'Alerts' with a blue '2' badge. A main navigation bar contains 'Home', 'Estimate', 'Maintenance', 'Reports', 'Administration', and 'Help'. The 'Administration' menu is open, listing options such as 'Profile Management', 'Change Password', 'Company Management', 'Company Reports', 'Vehicle Type Management', 'Buy/Renew Adjustrite', 'Users', 'Accounting', and 'Import'. The 'QuickBooks Online Connection' and 'QuickBooks Desktop Connection' options are visible at the bottom of the menu. In the main content area, a blue button labeled 'Connect Adjustrite with QuickBooks Online' is highlighted with a blue border. Below it is an 'Import/Sync Customers' button and a 'Terms of Use' link.

Choose the Connect AdjustRite with Quickbooks Online button.

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Sign In

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Email or user ID

Password

Use 6 or more characters and no spaces.

Remember me

Sign In

By clicking Sign In, you agree to our Terms and have read and acknowledge our US Privacy Statement.

[I forgot my user ID or password](#)

[New to Intuit? Create an account.](#)

Invisible reCAPTCHA by Google Privacy Policy and Terms of Use.

AdjustRite will forward you to the Intuit Quickbooks Online if you are not currently logged in. Provide your Quickbooks credentials if asked and Sign In.

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System Updates 0 Model Updates 0 Alerts 0

Home	Estimate	Maintenance	Reports	Administration	Help
------	----------	-------------	---------	----------------	------

QuickBooks Online

ENABLED

[Connect Adjustrite with QuickBooks Online](#)

Connected

Your account in AdjustRite is connected to your QuickBooks Online system.

[Click here to disconnect from QuickBooks Online](#)

[Import/Sync Customers](#)

[Save](#)

[Terms of Use](#)

Proceed back to AdjustRite and refresh the page. If the connection was successful, you will now see a green Connected notification.

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Step 2 – Managing Items

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Next, you will need to map Quickbooks codes to AdjustRite. Choose Manage Items from the Administration > Accounting drop-down menu.

The screenshot displays the AdjustRite software interface. At the top, there are three notification buttons: 'System Updates' (with a red circle containing '0'), 'Model Updates' (with an orange circle containing '0'), and 'Alerts' (with a blue circle containing '0'). Below these is a navigation bar with 'Administration' and 'Help' dropdown menus. The 'Administration' menu is expanded, showing options: Profile Management, Change Password, Company Management, Company Reports, Vehicle Type Management, Users, Accounting (selected), and Import. The 'Accounting' sub-menu is open, highlighting 'Manage Items', 'Manage Invoices', 'QuickBooks Online Connection', and 'QuickBooks Desktop Connection'. In the background, a table is visible with columns for 'RO #' and 'PO #', and rows containing numerical values like '002987', '002983', and '002982'.

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Account Name	Account Type	Sales Account #
Body Labor	Labor	BL
Mechanical Labor	Labor	ML
Frame Labor	Labor	FL
Glass Labor	Labor	GL
Refinish Labor	Labor	RL
Other Labor	Labor	OL
Sublet	Miscellaneous	ML
Aftermarket Parts	Parts	PARTS
LKQ Parts	Parts	PARTS
Reman Parts	Parts	PARTS
OEM Partial Parts	Parts	PARTS
OEM Parts	Parts	PARTS
Towing	Miscellaneous	ML
Paint Materials	Miscellaneous	PL
Shop Supplies	Miscellaneous	BL
Hazardous Waste	Miscellaneous	
Test Account	Test	
Test Account 2	Test	

Save Account Numbers

Each account will have a field that you will be able to enter your Quickbooks account number.

These can be located in Quickbooks under Lists > Item List.

*Note, the entries in this screenshot are only examples.



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AdjustRite®

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Account Name	Account Type	Sales Account #
Body Labor	Labor	BL
Mechanical Labor	Labor	ML
Frame Labor	Labor	FL
Glass Labor	Labor	GL
Refinish Labor	Labor	RL
Other Labor	Labor	OL
Sublet	Miscellaneous	ML
Aftermarket Parts	Parts	PARTS
LKQ Parts	Parts	PARTS
Reman Parts	Parts	PARTS
OEM Partial Parts	Parts	PARTS
OEM Parts	Parts	PARTS
Towing	Miscellaneous	ML
Paint Materials	Miscellaneous	PL
Shop Supplies	Miscellaneous	BL
Hazardous Waste	Miscellaneous	
Test Account	Test	
Test Account 2	Test	

When done, choose the Save Account Numbers button.

Save Account Numbers



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ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

Account Name	Account Type	Sales Account #
Body Labor	Labor	BL
Mechanical Labor	Labor	ML
Frame Labor	Labor	FL
Glass Labor	Labor	GL
Refinish Labor	Labor	RL
Other Labor	Labor	OL
Sublet	Miscellaneous	ML
Aftermarket Parts	Parts	PARTS
LKQ Parts	Parts	PARTS
Reman Parts	Parts	PARTS
OEM Partial Parts	Parts	PARTS
OEM Parts	Parts	PARTS
Towing	Miscellaneous	ML
Paint Materials	Miscellaneous	PL
Shop Supplies	Miscellaneous	BL
Hazardous Waste	Miscellaneous	
Test Account	Test	
Test Account 2	Test	

Save Account Numbers

The setup is now complete, and you are ready to start moving data from AdjustRite into Quickbooks.



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Step 3 – Exporting Invoices

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To enter the Quickbooks integration page, you can either select Manage Invoice on Step 5 Invoice or

The screenshot shows the AdjustRite web application interface. At the top, there is a navigation menu with tabs for Home, Estimate, Maintenance, Reports, Administration, and Help. Below the menu, a dropdown menu shows 'Customer: 1017'. A progress bar below the dropdown indicates five steps: 1 Customer, 2 Unit, 3 Rate Override, 4 Estimate, and 5 Repair Invoice. The 'Repair Invoice' step is highlighted in purple. Below the progress bar, there are two buttons: 'Save' and 'Manage Invoice'. The 'Manage Invoice' button is highlighted with a blue border. Below the buttons, the 'Repair Invoice' form is displayed. The form includes the following fields: Customer ID, Customer PO, Unit Repaired (radio buttons for Yes and No, with No selected), Reason (dropdown menu showing 'Pending Customer Decision'), Sales Rep, and Delivery Date.



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choose Administration > Accounting > Manage Accounting Exports

The screenshot shows the AdjustRite software interface. At the top, there are three notification boxes: 'System Updates' with a red circle containing '0', 'Model Updates' with an orange circle containing '0', and 'Alerts' with a blue circle containing '2'. Below these is a navigation menu with two columns. The left column contains: Administration, Profile Management, Change Password, Company Management, Company Reports, Vehicle Type Management, Buy/Renew Adjustrite, Users, Accounting, and Import. The right column contains: Help, Manage Items, Manage Accounting Exports, QuickBooks Online Connection, and QuickBooks Desktop Connection. The 'Accounting' item in the left column and the 'Manage Accounting Exports' item in the right column are highlighted with a blue border, indicating the current selection path.



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Manage Invoices

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search Invoices Unit Repaired [Refresh](#)

	Create Date	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount
<input type="checkbox"/>	Aug 05, 20...	1020	000010002987				Hino	155/195	\$1,615.99
<input type="checkbox"/>	Aug 07, 20...	1017	000010002988		123456	57	International	LT Series	\$2,267.96

[Send To Accounting](#)

Invoice History

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search History [Refresh](#)

	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount	Sent Date
Resend	Pricing	000010002957				Freightliner	Cascadia	\$6,357.00	Jul 21, 2020
Resend	Price, Owen	000010002980				International	Durastar 4...	\$28,195.42	Jul 21, 2020
Resend	Test Integration	000010002976				Freightliner	Cascadia	\$92,025.77	Aug 07, 2020
Resend	CBS Trucking	000010002977			1278787	Freightliner	Cascadia	\$2,686.87	Aug 07, 2020
Resend	Adam's Candy Shop	000010002981				Great Dane	Everest	\$8,534.76	Jul 23, 2020
Remove	Alpha One	000010002985				Great Dane	Everest	\$1,660.87	

The link will open a new page which is split into two grids, Manage Accounting Exports and Accounting Export History.

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

Manage Invoices

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search Invoices Unit Repaired [Refresh](#)

	Create Date	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount
<input type="checkbox"/>	Aug 05, 20...	1020	000010002987				Hino	155/195	\$1,615.99
<input type="checkbox"/>	Aug 07, 20...	1017	000010002988		123456	57	International	LT Series	\$2,267.96

[Send To Accounting](#)

Manage Accounting Exports will auto-populate files created in the past 30 days flagged as repaired.

Invoice History

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search History [Refresh](#)

	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount	Sent Date
Resend	Pricing	000010002957				Freightliner	Cascadia	\$6,357.00	Jul 21, 2020
Resend	Price, Owen	000010002980				International	Durastar 4...	\$28,195.42	Jul 21, 2020
Resend	Test Integration	000010002976				Freightliner	Cascadia	\$92,025.77	Aug 07, 20...
Resend	CBS Trucking	000010002977			1278787	Freightliner	Cascadia	\$2,686.87	Aug 07, 20...
Resend	Adam's Candy Shop	000010002981				Great Dane	Everest	\$8,534.76	Jul 23, 2020
Remove	Alpha One	000010002985				Great Dane	Everest	\$1,660.87	

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

Manage Invoices

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search Invoices Unit Repaired Refresh

	Create Date	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount
<input type="checkbox"/>	Aug 05, 20...	1020	000010002987				Hino	155/195	\$1,615.99
<input type="checkbox"/>	Aug 07, 20...	1017	000010002988		123456	57	International	LT Series	\$2,267.96

Send To Accounting

Search criteria is provided to further filter the grid, including date range, search, and a unit repaired checkbox. To update the grid, click on the Refresh button.

Invoice History

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search History Refresh

	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount	Sent Date
Resend	Pricing	000010002957				Freightliner	Cascadia	\$6,357.00	Jul 21, 2020
Resend	Price, Owen	000010002980				International	Durastar 4...	\$28,195.42	Jul 21, 2020
Resend	Test Integration	000010002976				Freightliner	Cascadia	\$92,025.77	Aug 07, 20...
Resend	CBS Trucking	000010002977			1278787	Freightliner	Cascadia	\$2,686.87	Aug 07, 20...
Resend	Adam's Candy Shop	000010002981				Great Dane	Everest	\$8,534.76	Jul 23, 2020
Remove	Alpha One	000010002985				Great Dane	Everest	\$1,660.87	

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

Manage Invoices

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search Invoices Unit Repaired Refresh

	Create Date	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount
<input type="checkbox"/>	Aug 05, 20...	1020	000010002987				Hino	155/195	\$1,615.99
<input type="checkbox"/>	Aug 07, 20...	1017	000010002988		123456	57	International	LT Series	\$2,267.96

Send To Accounting

Once the file(s) you are looking to move to Quickbooks is located, you can select the checkbox (far left) to flag the file. The checkbox at the top will select all visible files in the grid.

Invoice History

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search History Refresh

	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount	Sent Date
Resend	Pricing	000010002957				Freightliner	Cascadia	\$6,357.00	Jul 21, 2020
Resend	Price, Owen	000010002980				International	Durastar 4...	\$28,195.42	Jul 21, 2020
Resend	Test Integration	000010002976				Freightliner	Cascadia	\$92,025.77	Aug 07, 2020
Resend	CBS Trucking	000010002977			1278787	Freightliner	Cascadia	\$2,686.87	Aug 07, 2020
Resend	Adam's Candy Shop	000010002981				Great Dane	Everest	\$8,534.76	Jul 23, 2020
Remove	Alpha One	000010002985				Great Dane	Everest	\$1,660.87	

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Manage Invoices

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search Invoices Unit Repaired Refresh

	Create Date	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount
<input type="checkbox"/>	Aug 05, 20...	1020	000010002987				Hino	155/195	\$1,615.99
<input type="checkbox"/>	Aug 07, 20...	1017	000010002988		123456	57	International	LT Series	\$2,267.96

Send To Accounting

Before proceeding, make sure Quickbooks desktop and the AdjustRite EMS File Manager are running in the background.

With the file(s) selected, click the Send to Accounting button.

Invoice History

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search History Refresh

	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount	Sent Date
Resend	Pricing	000010002957				Freightliner	Cascadia	\$6,357.00	Jul 21, 2020
Resend	Price, Owen	000010002980				International	Durastar 4...	\$28,195.42	Jul 21, 2020
Resend	Test Integration	000010002976				Freightliner	Cascadia	\$92,025.77	Aug 07, 20...
Resend	CBS Trucking	000010002977			1278787	Freightliner	Cascadia	\$2,686.87	Aug 07, 20...
Resend	Adam's Candy Shop	000010002981				Great Dane	Everest	\$8,534.76	Jul 23, 2020
Remove	Alpha One	000010002985				Great Dane	Everest	\$1,660.87	

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

Manage Invoices

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search Invoices Unit Repaired [Refresh](#)

	Create Date	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount
<input type="checkbox"/>	Aug 05, 20...	1020	000010002987				Hino	155/195	\$1,615.99
<input type="checkbox"/>	Aug 07, 20...	1017	000010002988		123456	57	International	LT Series	\$2,267.96

[Send To Accounting](#)

This will transfer the data to Quickbooks and move the file from the Manage Invoices grid to the Invoice History grid.

Invoice History

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search History [Refresh](#)

	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount	Sent Date
Resend	Pricing	000010002957				Freightliner	Cascadia	\$6,357.00	Jul 21, 2020
Resend	Price, Owen	000010002980				International	Durastar 4...	\$28,195.42	Jul 21, 2020
Resend	Test Integration	000010002976				Freightliner	Cascadia	\$92,025.77	Aug 07, 20...
Resend	CBS Trucking	000010002977			1278787	Freightliner	Cascadia	\$2,686.87	Aug 07, 20...
Resend	Adam's Candy Shop	000010002981				Great Dane	Everest	\$8,534.76	Jul 23, 2020
Remove	Alpha One	000010002985				Great Dane	Everest	\$1,660.87	

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

Manage Invoices

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search Invoices Unit Repaired [Refresh](#)

Create Date	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount
Aug 05, 20...	1020	000010002987				Hino	155/195	\$1,615.99
Aug 07, 20...	1017	000010002988		123456	57	International	LT Series	\$2,267.96

[Send To Accounting](#)

Once sent to Quickbooks, the file will now show up in the Invoice History grid.

Invoice History

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search History [Refresh](#)

	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount	Sent Date
Resend	Pricing	000010002957				Freightliner	Cascadia	\$6,357.00	Jul 21, 2020
Resend	Price, Owen	000010002980				International	Durastar 4...	\$28,195.42	Jul 21, 2020
Resend	Test Integration	000010002976				Freightliner	Cascadia	\$92,025.77	Aug 07, 20...
Resend	CBS Trucking	000010002977			1278787	Freightliner	Cascadia	\$2,686.87	Aug 07, 20...
Resend	Adam's Candy Shop	000010002981				Great Dane	Everest	\$8,534.76	Jul 23, 2020
Remove	Alpha One	000010002985				Great Dane	Everest	\$1,660.87	

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

Manage Invoices

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search Invoices Unit Repaired Refresh

	Create Date	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount
<input type="checkbox"/>	Aug 05, 20...	1020	000010002987				Hino	155/195	\$1,615.99
<input type="checkbox"/>	Aug 07, 20...	1017	000010002988		123456	57	International	LT Series	\$2,267.96

Send To Accounting

You are able to filter the invoice history using the search criteria and clicking the refresh button.

Invoice History

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search History Refresh

	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount	Sent Date
Resend	Pricing	000010002957				Freightliner	Cascadia	\$6,357.00	Jul 21, 2020
Resend	Price, Owen	000010002980				International	Durastar 4...	\$28,195.42	Jul 21, 2020
Resend	Test Integration	000010002976				Freightliner	Cascadia	\$92,025.77	Aug 07, 20...
Resend	CBS Trucking	000010002977			1278787	Freightliner	Cascadia	\$2,686.87	Aug 07, 20...
Resend	Adam's Candy Shop	000010002981				Great Dane	Everest	\$8,534.76	Jul 23, 2020
Remove	Alpha One	000010002985				Great Dane	Everest	\$1,660.87	

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

Manage Invoices

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search Invoices Unit Repaired Refresh

Create Date	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount
Aug 05, 20...	1020	000010002987				Hino	155/195	\$1,615.99
Aug 07, 20...	1017	000010002988		123456	57	International	LT Series	\$2,267.96

Send To Accounting

There is an available Resend button for cases in which you need to manually resend the data to Quickbooks.

Invoice History

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search History Refresh

	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount	Sent Date
Resend	Pring	000010002957				Freightliner	Cascadia	\$6,357.00	Jul 21, 2020
Resend	Pring, Owen	000010002980				International	Durastar 4...	\$28,195.42	Jul 21, 2020
Resend	Text Integration	000010002976				Freightliner	Cascadia	\$92,025.77	Aug 07, 20...
Resend	CB Trucking	000010002977			1278787	Freightliner	Cascadia	\$2,686.87	Aug 07, 20...
Resend	Adam's Candy Shop	000010002981				Great Dane	Everest	\$8,534.76	Jul 23, 2020
Resend	Alpha One	000010002985				Great Dane	Everest	\$1,660.87	

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

Manage Invoices

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search Invoices Unit Repaired Refresh

	Create Date	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount
<input type="checkbox"/>	Aug 05, 20...	1020	000010002987				Hino	155/195	\$1,615.99
<input type="checkbox"/>	Aug 07, 20...	1017	000010002988		123456	57	International	LT Series	\$2,267.96

Send To Accounting

If Quickbooks was not open when you attempted to send the data, you can remove the file from the grid which will place it back into the Manage Accounting Exports grid.

Invoice History

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search History Refresh

	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount	Sent Date
Resend	Pricing	000010002957				Freightliner	Cascadia	\$6,357.00	Jul 21, 2020
Resend	Price, Owen	000010002980				International	Durastar 4...	\$28,195.42	Jul 21, 2020
Resend	Test Integration	000010002976				Freightliner	Cascadia	\$92,025.77	Aug 07, 2020
Resend	CBS Trucking	000010002977			1278787	Freightliner	Cascadia	\$2,686.87	Aug 07, 2020
Resend	Adam's Candy Shop	000010002981				Great Dane	Everest	\$8,534.76	Jul 23, 2020
Remove	Alpha One	000010002985				Great Dane	Everest	\$1,660.87	

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

Manage Invoices

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search Invoices Unit Repaired

Create Date	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount
Aug 05, 20...	1020	000010002987				Hino	155/195	\$1,615.99
Aug 07, 20...	1017	000010002988		123456	57	International	LT Series	\$2,267.96

If the file was successful, there will be a checkbox and an invoice number displayed.

*Note, it may take up to 10 minutes for the grid data to update.

Invoice History

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search History

Ref #	Claim #	RO #	Unit #	Make	Model	Amount	Sent Date	Succ...	Invoice #	Error Msg
00010002957				Freightliner	Cascadia	\$6,357.00	Jul 21, 2020	<input checked="" type="checkbox"/>		
00010002980				International	Duraster 4...	\$28,195.42	Jul 21, 2020	<input checked="" type="checkbox"/>	142	
00010002976				Freightliner	Cascadia	\$92,025.77	Aug 07, 20...	<input checked="" type="checkbox"/>	144	
00010002977			1278787	Freightliner	Cascadia	\$2,086.87	Aug 07, 20...	<input checked="" type="checkbox"/>	145	
00010002981				Great Dane	Everest	\$8,534.76	Jul 23, 2020	<input checked="" type="checkbox"/>	143	
00010002985				Great Dane	Everest	\$1,660.87		<input type="checkbox"/>		

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

Manage Invoices

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search Invoices Unit Repaired Refresh

Create Date	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount
Aug 05, 20...	1020	000010002987				Hino	155/195	\$1,615.99
Aug 07, 20...	1017	000010002988		123456	57	International	LT Series	\$2,267.96

Send To Accounting

The data is now in Quickbooks which can be located under Invoices or Estimates.

Invoice History

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search History Refresh

Ref #	Claim #	RO #	Unit #	Make	Model	Amount	Sent Date	Succ...	Invoice #	Error Msg
00010002957				Freightliner	Cascadia	\$6,357.00	Jul 21, 2020	✓		
00010002980				International	Duraster 4...	\$28,195.42	Jul 21, 2020	✓	142	
00010002976				Freightliner	Cascadia	\$92,025.77	Aug 07, 20...	✓	144	
00010002977			1278787	Freightliner	Cascadia	\$2,086.87	Aug 07, 20...	✓	145	
00010002981				Great Dane	Everest	\$8,534.76	Jul 23, 2020	✓	143	
00010002985				Great Dane	Everest	\$1,660.87		⊘		

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

Manage Invoices

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search Invoices Unit Repaired Refresh

	Create Date	Customer	Ref #	Claim #	RO #	Unit #	Make	Model	Amount
<input type="checkbox"/>	Aug 05, 20...	1020	000010002987				Hino	155/195	\$1,615.99
<input type="checkbox"/>	Aug 07, 20...	1017	000010002988		123456	57	International	LT Series	\$2,267.96

[Send To Accounting](#)

If unsuccessful, an error message will display. This will normally populate if Quickbooks was not open when the file was flagged for export.

Invoice History

From Date: 7/7/2020 04:52 pm To Date: 8/7/2020 04:52 pm Search: Search History Refresh

Ref #	Claim #	RO #	Unit #	Make	Model	Amount	Sent Date	Succ...	Invoice #	Error Msg
00010002957				Freightliner	Cascadia	\$6,357.00	Jul 21, 2020	<input checked="" type="checkbox"/>		
00010002980				International	Duraster 4...	\$28,195.42	Jul 21, 2020	<input checked="" type="checkbox"/>	142	
00010002976				Freightliner	Cascadia	\$92,025.77	Aug 07, 20...	<input checked="" type="checkbox"/>	144	
00010002977			1278787	Freightliner	Cascadia	\$2,086.87	Aug 07, 20...	<input checked="" type="checkbox"/>	145	
00010002981				Great Dane	Everest	\$8,534.76	Jul 23, 2020	<input checked="" type="checkbox"/>	143	
00010002985				Great Dane	Everest	\$1,660.87		<input type="checkbox"/>		

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

Step 5 (Optional) – Synchronizing Customers



Bringing innovation to the surface.™



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System Updates 0 Model Updates 0 Alerts 0

Home	Estimate	Maintenance	Reports	Administration	Help
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QuickBooks Online

ENABLED

[Connect Adjustrite with QuickBooks Online](#)

Connected
Your account in AdjustRite is connected to your QuickBooks Online system.

[Click here to disconnect from QuickBooks Online](#)

[Import/Sync Customers](#)

[Save](#)

[Terms of Use](#)

To synchronize customers, proceed to Administration > Accounting > Quickbooks Online Connection and choose Import/Sync Customers.

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Doug Orr - AdjustRite Commercial Solutions [Logout](#)

System Updates 0 Model Updates 0 Alerts 0

Home	Estimate	Maintenance	Reports	Administration	Help
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QuickBooks Online

ENABLED

[Connect Adjustrite with QuickBooks Online](#)

Connected
Your account in AdjustRite is connected to your QuickBooks Online system.

[Click here to disconnect from QuickBooks Online](#)

[Import/Sync Customers](#)

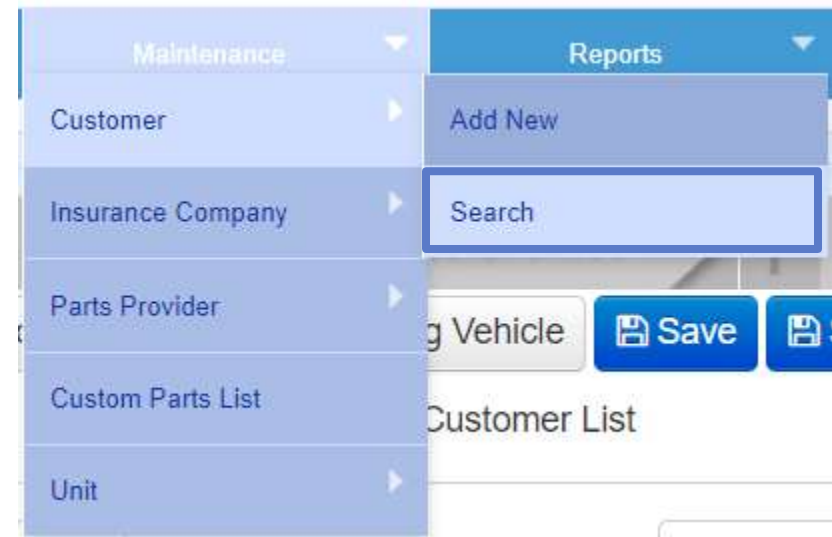
[Save](#)

[Terms of Use](#)

This will import all saved customers from Quickbooks online to AdjustRite.

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

If you have synchronized customers, you can view/edit them via Maintenance > Search.



ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION












The grid will display all available AdjustRite customers. If the customer was imported from Quickbooks, the last column will display the QB logo.

Clear Search

Rows Per Page: 25

Total of 500+ available results.

Select All

	View	Delete	Customer ▲	Address	City	State	Postal Code	Email	Phone	Fax	
1	View	Delete	"DOUBLE ""F"" HOLDINGS LTD"								
2	View	Delete	02 PLUS INC								
3	View	Delete	056729 NB LTD								
4	View	Delete	0694201 B.C. LTD								
5	View	Delete	0871499 B.C. LTD								
6	View	Delete	1001	Jane Smith							
7	View	Delete	1002	Sheila Jones							
8	View	Delete	1003	Gary Jones							
9	View	Delete	1004	Jay Elma							
10	View	Delete	1005	Northeast Construction							
11	View	Delete	1006	Mickey Rollings							
12	View	Delete	1007	Mick Mickey							
13	View	Delete	1008	Mr. Benz							
14	View	Delete	1009	Mrs. Sentra							
15	View	Delete	1010	Mr Vette							
16	View	Delete	1011			MS					

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION












The grid will display all available AdjustRite customers. If the customer was imported from Quickbooks, the last column will display the QB logo.

Clear Search

Rows Per Page: 25

Total of 500+ available results.

Select All

	View	Delete	Customer ▲	Address	City	State	Postal Code	Email	Phone	Fax	
1	View	Delete	"DOUBLE ""F"" HOLDINGS LTD"								
2	View	Delete	02 PLUS INC								
3	View	Delete	056729 NB LTD								
4	View	Delete	0694201 B.C. LTD								
5	View	Delete	0871499 B.C. LTD								
6	View	Delete	1001	Jane Smith							
7	View	Delete	1002	Sheila Jones							
8	View	Delete	1003	Gary Jones							
9	View	Delete	1004	Jay Elma							
10	View	Delete	1005	Northeast Construction							
11	View	Delete	1006	Mickey Rollings							
12	View	Delete	1007	Mick Mickey							
13	View	Delete	1008	Mr. Benz							
14	View	Delete	1009	Mrs. Sentra							
15	View	Delete	1010	Mr Vette							
16	View	Delete	1011			MS					

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

You can sort the grid by using any of the column headers, including the new QB column.

Clear Search

Rows Per Page: 25

Total of 500+ available results.

Select All

	View	Delete	Customer ▲	Address	City	State	Postal Code	Email	Phone	Fax	QB
1	View	Delete	"DOUBLE ""F"" HOLDINGS LTD"								
2	View	Delete	02 PLUS INC								
3	View	Delete	056729 NB LTD								
4	View	Delete	0694201 B.C. LTD								
5	View	Delete	0871499 B.C. LTD								
6	View	Delete	1001	Jane Smith							
7	View	Delete	1002	Sheila Jones							
8	View	Delete	1003	Gary Jones							
9	View	Delete	1004	Jay Elma							
10	View	Delete	1005	Northeast Construction							
11	View	Delete	1006	Mickey Rollings							
12	View	Delete	1007	Mick Mickey							
13	View	Delete	1008	Mr. Benz							
14	View	Delete	1009	Mrs. Sentra							
15	View	Delete	1010	Mr Vette							
16	View	Delete	1011			MS					

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

We have also added new features to maintain your customer list. Checkboxes are now available to select all or specific customers.

Total of 500+ available results

Select All

	View	Delete	Customer ▲	Address	City	State	Postal Code	Email	Phone	Fax
1	<input type="checkbox"/>	View	Delete	DOUBLE "F" HOLDINGS LTD*						
2	<input type="checkbox"/>	View	Delete	2 PLUS INC						
3	<input type="checkbox"/>	View	Delete	56729 NB LTD						
4	<input type="checkbox"/>	View	Delete	694201 B.C. LTD						
5	<input type="checkbox"/>	View	Delete	871499 B.C. LTD						
6	<input type="checkbox"/>	View	Delete	001	Jane Smith					
7	<input type="checkbox"/>	View	Delete	002	Sheila Jones					
8	<input type="checkbox"/>	View	Delete	003	Gary Jones					
9	<input type="checkbox"/>	View	Delete	004	Jay Elma					
10	<input type="checkbox"/>	View	Delete	005	Northeast Construction					
11	<input type="checkbox"/>	View	Delete	006	Mickey Rollings					
12	<input type="checkbox"/>	View	Delete	007	Mick Mickey					
13	<input type="checkbox"/>	View	Delete	008	Mr. Benz					
14	<input type="checkbox"/>	View	Delete	009	Mrs. Sentra					
15	<input type="checkbox"/>	View	Delete	010	Mr Vette					
16	<input type="checkbox"/>	View	Delete	011			MS			
17	<input type="checkbox"/>	View	Delete	01114336 SASKATCHEWAN LTD						
18	<input type="checkbox"/>	View	Delete	012			MS			
19	<input type="checkbox"/>	View	Delete	014	Mr BMW 328i					
20	<input type="checkbox"/>	View	Delete	015			MS			
21	<input type="checkbox"/>	View	Delete	016	Mike Lancaster					
22	<input type="checkbox"/>	View	Delete	017	123 Any St.	Peachtree City	GA	jim.smith@ppgmvp.com	(770) 652-7391	
23	<input type="checkbox"/>	View	Delete	018	Europe					
24	<input type="checkbox"/>	View	Delete	019	Jan Gerry					
25	<input type="checkbox"/>	View	Delete	020	2620 West Street	Brooks	GA	jgains@mymail.com	(555) 555-5555	

1 2 10 20

Delete Selected

ADJUSTRITE – QUICKBOOKS ONLINE INTEGRATION

If duplicates are located, select the duplicate(s) and choose Delete Selected.

Total of 500+ available results

Select All

	View	Delete	Customer ▲	Address	City	State	Postal Code	Email	Phone	Fax
1	<input type="checkbox"/>	View	Delete	DOUBLE "F" HOLDINGS LTD*						
2	<input type="checkbox"/>	View	Delete	2 PLUS INC						
3	<input type="checkbox"/>	View	Delete	56729 NB LTD						
4	<input type="checkbox"/>	View	Delete	694201 B.C. LTD						
5	<input type="checkbox"/>	View	Delete	871499 B.C. LTD						
6	<input type="checkbox"/>	View	Delete	001	Jane Smith					
7	<input type="checkbox"/>	View	Delete	002	Sheila Jones					
8	<input type="checkbox"/>	View	Delete	003	Gary Jones					
9	<input type="checkbox"/>	View	Delete	004	Jay Elma					
10	<input type="checkbox"/>	View	Delete	005	Northeast Construction					
11	<input type="checkbox"/>	View	Delete	006	Mickey Rollings					
12	<input type="checkbox"/>	View	Delete	007	Mick Mickey					
13	<input type="checkbox"/>	View	Delete	008	Mr. Benz					
14	<input type="checkbox"/>	View	Delete	009	Mrs. Sentra					
15	<input type="checkbox"/>	View	Delete	010	Mr Vette					
16	<input type="checkbox"/>	View	Delete	011			MS			
17	<input type="checkbox"/>	View	Delete	01114336 SASKATCHEWAN LTD						
18	<input type="checkbox"/>	View	Delete	012			MS			
19	<input type="checkbox"/>	View	Delete	014	Mr BMW 328i					
20	<input type="checkbox"/>	View	Delete	015			MS			
21	<input type="checkbox"/>	View	Delete	016	Mike Lancaster					
22	<input type="checkbox"/>	View	Delete	017	123 Any St.	Peachtree City	GA	jim.smith@ppgmvp.com	(770) 652-7391	
23	<input type="checkbox"/>	View	Delete	018	Europe					
24	<input type="checkbox"/>	View	Delete	019	Jan Gerry					
25	<input type="checkbox"/>	View	Delete	020	2620 West Street	Brooks	GA	jgains@mymail.com	(555) 555-5555	

1 2 10 20

Delete Selected

