IPM Global QuickBooks Integration

With easy step-by-step instructions, you can run a one-time set up and sync. Afterwards, you only need to enter data in one place and it is automatically updated in the other, saving you time and trouble.

By bringing your IPM and QuickBooks data together you can get deeper business insights and focus on what matters most: getting more business.

IPM Integration for QuickBooks features:

1. QuickBooks customers sync to IPM accounts
2. IPM project costs sync to QuickBooks projects
3. IPM time reporting syncs to QuickBooks employees
4. Configurable sync options
5. View QuickBooks customer details in IPM - locations, estimates, sales orders, invoices
6. Create transactions in QuickBooks from IPM - estimates, invoices, sales receipts
7. See up-to-date QuickBooks item pricing and availability

Now you can automate the flow of your project management and sales data with your accounting data not only to integrate your systems, but experience comprehensive visibility and control over the financial data that drives your business.

Leverage your IPM investment to enable world class customer relationship pipeline management.

• **Increase customer satisfaction**. Share and track all customer interactions, ensuring the entire team is on one page with your accounts.

• **View all of your project management data** in one place. With a complete set of sales opportunities and financial data, you can quickly leverage accounting capabilities like payment,

Accounts identified as Customers	2 way Sync	Customers
Accounts identified as Vendors	2 way Sync	Vendors
Jobs	2 way Sync	Jobs
Tasks	Not Required	IPM Task Codes equate to GL Accounts in QuickBooks
Cost types	Not Required	Cost Types are used for reporting only in IPM
Job Budget Detail	N/A	
Resource Groups	N/A	
Resources	N/A	
Purchase Orders	1 Way Sync to QuickBooks	Purchase Orders
Subcontracts	1 Way Sync to QuickBooks	Purchase Orders
Subcontract Change Orders	1 Way Sync to QuickBooks	Purchase Orders
Purchase/Subcontract Invoices	Sending via Sync as an alternative to sending Purchase Orders. Allows better management of Purchase Orders.	
Products with UOM and Price	1 Way Sync to IPM	Items
Timesheet Entries	1 Way Sync to QuickBooks	Job Resource Journal
Progress Billing Invoices	1 Way Sync to QuickBooks	AR Invoices

- **Increase accuracy of cash flow projections** with complete access to integrated sales forecast data.
- **Experience flexible scheduling** features to customize how and when data is transferred.
- **Ensure data integrity** with optional data audit, data cleansing, and data remediation.

- **Realize a significant reduction in operational costs**. With IT no longer having to procure, install, and maintain multiple systems as well as the various integrations between them, IT resources can be used to improve the business operations.
- **Foster Innovation**. Because process changes can be configured and implemented quickly, business users are able to apply their functional expertise to tailor processes and improve performance. Simultaneously, IT is liberated to focus on strategic initiatives to add value to the bottom line by building innovative value-added solutions for your company.

Specifications & Requirements

- Current subscription to IPM Global.
- Current subscription to accounting application.
- Reliable connectivity to both systems.
- Included in the Integration Service is a lightweight Connector Application. It is installed on the same sever as accounting application, if an on-premise installation.
- Credentials for read/write access to both systems, as requested.

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