QuickBooks Desktop Integration Setup Guide

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General Setup Instructions

The following steps need to be taken to pave the way for your LMN and QuickBooks Desktop Sync. These items provide the necessary connection between LMN and QuickBooks for the purpose of importing your Estimates, Timesheets, Invoices, Payments, and Vendor Bills.

Cost Codes

LMN Cost Codes will be set up in LMN to link revenue to your Service Items in QuickBooks.

Once your estimates are pushed to QuickBooks, Service Items will help to show how much revenue you earned in different areas of your business vs. how much you spent on COGS (Labor, Equipment, Materials, Subs) to earn that revenue.

- 1. The first step to syncing LMN with QuickBooks is to create your Cost Codes in LMN. You do this by clicking **Cost Codes** under the **Estimates** settings.
- 2. Your Cost Codes match to your income Service Items in QuickBooks.



NOTE: If you are looking to streamline your Service Item List or Chart of Accounts in QuickBooks, we recommend that you check out our Sample Lists in our LMN Help Desk (search QuickBooks Sample). Our Help Desk can be found in the left main menu: **Help & Resources > Help Desk**. We also walk through this setup in LMN Academy Online, which can be found in your LMN Home Menu as well!



Taxes

- 1. In your LMN Menu, click Price List > Taxes.
- 2. You need to have taxes set up and assigned to estimates for them to import into QuickBooks.

	S TAXES		🕈 Setup Defaults
 Dashboards Budget 	Q Type to search		+ Add New
	Name	Description	Active 🤟 Actions
	EXMT	Tax Exempt	• / T
* Equipment	Material Purchasing Tax	Purchasing	• / T
Time Materials (legacy)	HST	HST	• 🖌 🗉
	ON - Tax	HST	• 🖌 T
	ON - Tax(A)	HST(Archived)	· / T
	ON - Tax(A)(A)	HST(Archived)(Archived)	· / T
Taxes	BC - TAX(A)	British Columbia's TAX(Archived)	· / T
Templetes	AB Tax(A)	Alberta's Tax(Archived)	· / T
	MB - TAX(A)	Manitoba Tax(Archived)	· / T
Estimates	NB - TAX(A)	New Brunswick(Archived)	· / T
edot 🛱	BC - TAX	British Columbia's TAX	· / T
Schedule	MB - TAX	Manitoba Tax	· / T
P Help & Resources	NB - TAX	New Brunswick	· / T
তি Settings			

NOTE: More information on Taxes can be found in our LMN Help Desk as well as on LMN Academy Online. If you do not charge tax for certain types of work, you will need to use a "tax exempt" code, which would be set to 0%. Now that you have your taxes setup click setup defaults in the top right corner so that you don't need to set frequent taxes every time you create an estimate (**HINT**: copy your sales tax items in QuickBooks).

Payroll Codes (if applicable)

Payroll Codes will link to your Payroll Items in QuickBooks. For example, in QuickBooks, employees have payroll codes for hourly and overtime wages. If the employee was paid a 'Premium wage' for other work types (like snow or unionized work) - you could setup additional payroll codes for that staff.

- 1. In the LMN menu, click Settings > Timesheets > Payroll Codes
- 2. Click the + Add New button to add additional codes.
- 3. Give the Payroll Code a name. (*HINT*: it's recommended you name your Payroll Codes as close as you can to your Payroll Item's in QuickBooks to avoid any confusion when running the QuickBooks Sync Tool and matching these).
- 4. The **Payroll ID** is an extra field that could be used in the event you wish to add any extra pertinent information or if your bookkeeper uses IDs in QuickBooks to label each Payroll Item. This field is simply for viewing purposes and does not impact any aspect of LMN/QuickBooks; it can be left blank.
- 5. You can then indicate if the Payroll Code is Active by checking the option box.
- 6. Click SAVE.

NOTE: More information on Payroll Codes can be found in our LMN Help Desk as well as on LMN Academy Online.

	PAYROLL CODES	
 Deshboerds Budget 		+ Add New
⊞ Price List ∨	Name 🕈 Active Matched to Quickbooks?	Actions
* Labor Equipment	Field Wages-OT	/ =
Materials	Field Wages Reg	/ 1
• Time Materials (legacy)	Settings & Configuration	✓ T
 Material Categories 	🛱 Account 😤 Users & Staff 😤 My Settings 🗒 CRM	/ 1
Subs	Set-up Progress LIMN Users My Profile Tags	/ T
* Other	Company Information Staff Report Settings Referral Sources Portal & Payments Staff Groups Notifications Measurement Types	× T
Taxes	Subscription	/ T
Templates	🖥 Estimates 📾 Jobs 🗖 Scheduling 🕓 Timesheets Estimate Settings Job Types Schedule Settings Timesheet Settings	× T
E CRM	Terms & Conditions Default Tasks Work Calendars Payroll Codes	✓ T
Estimetes	Juliuses Services Schedule Levis Payloli & Vertiline Divisions Hourly Rates Holidays Equipment	/ 1
adol. 🗎	Cost Codes	/ 1
Schedule	الله استفادات کی Integrations است. Invoice Settings Quickbooks	2 T
Help & Resources	Peyment Settings Zapier	/ 1
Settings >	[+ Log Dot LMN Academy	2 T

Payment Types

Payment Types will link to your Payment Items in QuickBooks.

- 1. In your LMN menu, click **Settings**, click **Payment Settings** under the **Invoicing** settings.
- 2. Click the **+New** button to add a Payment Method.

Bin		S PAYMENT SETTINGS	
0 C	Dashboards Budget		+ Add New
		Payment Method 🕈 🔋 🗛	Actions
1	Equipment	CardConnect	/ 1
Ì		Settings & Configuration	/ 11
	Material Categories Subs	🛱 Account 🤮 Users & Staff 🖉 My Settings 🔋 CRM	/ T
+		Secup Progress LMR Usern My Profile Tags Company Information Staff Report Settings Referral Sources Protal & Pryments Staff Groups Notifications Measurement Types	/ 1
i	Production Rates Taxes	Subscription	/ 1
L E	Templates CRM	Estimate Settings Job Types Schedulo Settings Timesheet Settings Terms & Conditions Default Tasks Work Calendars Payroll Codes Terms & Conditions Default Tasks Up 1 = 8 + 8 + 1 = 8 + 1 = 8 + 1 = 1 = 1 = 1 = 1 = 1 = 1 = 1 = 1 = 1	
	Estimates	Statuses Services Schedule Crews Payroli & Overtime Divisions Hourly Rates Holidays Equipment Craft Croles	
ē	Schedule	Invoking & Integrations Invoke Settings Quickbooks	
¢	Help & Resources	Payment Settings Zapier	
٢	Settings >	€→ Log Out LNN Academy	



QuickBooks Setup

You will need to do your QuickBooks Setup before attempting to Sync Estimates.

1. In your LMN menu, click **Settings**, click **QuickBooks** under **Integrations**. From here, you can complete the setup as outlined below:

bin		QUICKBOOKS SETUP			a Save Changes
ø ⊎	Dashboards Budget Price List 🗸	Default Status View		± Download the LMN QB Sync desktop App	Troubleshooting
	Labor Equipment Materials	Which estimate status do you want to view first when iden Standard Estimates Solid Service Estimates Solid	v v	After successful export, update the estimate's status to: Standard Estimates Exported to QB Service Estimates Exported to QB	* *
		Settings & Configuration	Any Settings 🚺 CRM My Profile Tags Danced Stations Declaration		
	Other Production Rates Taxes	Company information Staff Portal & Payments Staff Groups Subscription	Report Settings Referral Sources Notifications Measurement Typ	***	
	CRM Estimates	Esomate actings Job types Terms & Conditions Default Tasks Statusos Services Divisions Hourly Rates Cost Codes	Schedule Setting Timesheet Setting Vork Calendars Payroll Codes Schedule Crews Payroll & Overtime Holidays Equipment		
-	Schedule Help & Resources	Invoicing Invoice Settings Payment Settings			
۲	Settings	[→ Log Out LMN Acedemy			

Default Status View

Selecting a status here will determine which estimates appear first in the QuickBooks Export list (found in the LMN Menu > QuickBooks > Export). You can also leave your default as "All Statuses" to see all and sort once you are in the export area.

QUICKBOOKS SETU	Ρ				Save Changes
				★ Download the LMN QB Sync desktop App	Troubleshooting
Default Status View			Estimate Status Update		
Which estimate status do you v	want to view first when identifying estimates for export to QB?		After successful export, up	date the estimates'status to:	
Standard Estimates	Sold	•	Standard Estimates	Exported to QB	-
Service Estimates	Sold	Ŧ	Service Estimates	Exported to QB	•
Default Export Format			•		
Which format do you want to u	se as the default format for exporting invoices?				
Standard Estimates	Detailed (Print details)	~			
Service Estimates	Detailed	*			

Estimate Status Update

This will automatically change the status of exported estimates to the status you have selected from these dropdowns. Alternatively, you can opt to leave the estimates in the same status by choosing the "OFF - Setting Disabled" option.

QUICKBOOKS SETUP					Save Changes
			(▲ Download the LMN QB Sync desktop App	Troubleshooting
Default Status View			Estimate Status Update		
Which estimate status do you want	to view first when identifying estimates for export to QB?		After successful export, update	the estimates'status to:	
Standard Estimates	Sold	•	Standard Estimates	Exported to QB	•
Service Estimates	Sold	•	Service Estimates	Exported to QB	
Default Export Format					
Which format do you want to use as	s the default format for exporting invoices?				
Standard Estimates	Detailed (Print details)	*			
Service Estimates	Detailed	*			

Default Export Format (Standard Estimates):

- o Simple Combines everything that shares an LMN Cost Code and Tax Code
- o Summary Breaks the estimate down by Work Area
- **Detailed** Breaks the estimate down by individual line item, and during the sync, there will be two more additional options:
 - Hide details Will bring over all line items but will only include the Work Areas on the invoice.
 - Print details Will show each line item on the invoice.
- Default Export Format (Service Estimates):
 - o Summary breaks estimate down by Service Type
 - o Detailed breaks estimate down by line item.

QUICKBOOKS SET	UP			Save Changes
				Download the LMN Q8 Sync desktop App Troubleshooting
Default Status View			Estimate Status Update	
Which estimate status do you	a want to view first when identifying estimates for export to QB?		After successful export, upda	ate the estimates'status to:
Standard Estimates	Sold	*	Standard Estimates	Exported to QB
Service Estimates	Sold	Ŧ	Service Estimates	Exported to QB
Default Export Format]	
Which format do you want to	use as the default format for exporting invoices?			
Standard Estimates	Detailed (Print details)	Ŧ		
Service Estimates	Detailed	· ·		
			•	

Downloading the LMN QuickBooks Sync Application

NOTE: Please, make sure that you have access to Accounting in the LMN permission settings to import into *QuickBooks*.

- 1. In your LMN menu, click Settings, click QuickBooks under Integrations.
- 2. Click on the button "Download the LMN QB Sync desktop App".
- 3. Make sure you save your QuickBooks Sync tool in the same location on your computer or server where your QuickBooks Company File resides.

■ * QUICKBOOKS SET	'UP			🗟 Save Changes	
Defeult Stetus View			Entirente Status Vadata	Download the LMN QB Sync desktop App Troubleshooting	
Default Status view			Estimate status opuate		
Which estimate status do you	u want to view first when identifying estimates for export to QB?		After successful export, upda	ite the estimates'status to:	
Standard Estimates	Sold	-	Standard Estimates	Exported to QB	*
Service Estimates	Sold	*	Service Estimates	Exported to QB	*
Default Export Format					
Which format do you want to	use as the default format for exporting invoices?				
Standard Estimates	Detailed (Print details)	*			
Service Estimates	Detailed	*			

Connection Instructions

These steps will link your LMN Account and your QuickBooks Account to the Sync Tool.

STEP 1 - Connect to your LMN account

NOTE: If you have access to LMN Accounting permissions, you will be able to use your credentials to connect in **STEP 1**. If you experience any difficulty connecting in **STEP 1**, please contact support via live chat or email: <u>support@golmn.com</u>.

- 1. Open your LMN QuickBooks Sync App and click on the **Settings** tab.
- 2. Click on STEP 1 Connect to your LMN Account under Connections.
- 3. Enter your LMN Username and Password
- 4. Ensure you get the "Authentication Successful!" message > Click Ok

CMN QuickBooks Sync v3.8.0.0 [connecting to https://syncapi2.golmn.com/]	×
ଡାmn	Get Help and Training
SYNC PROFILE	
Sync Profile #1 (Default)	
Publish Settings	
CONNECTIONS	SETTINGS
1. Connect to your LMN account Connected as: LMN Academy	3. Choose your estimating import settings Inactivate Existing, Taxes ON, Costs and Prices
2. Connect to your QuickBooks company file Company File: Big Mac Landscaping.qbw	4. Match LMN's cost codes + tax codes Matching Complete
	5. Set your job creation and job costing style Job Costing Style: DETAILED
	6. Link cost codes, staff, payroll items, and payment methods Matching Complete
	7. Link your jobs to QuickBooks jobs Matching Incomplete
	8. Match Vendors Match LMN Vendors to QuickBooks Vendors
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STEP 2 - Connect to your QuickBooks Company File

NOTE: STEP 2 must be completed while logged into your QuickBooks account as an Admin in Single User Mode. After your initial connection is complete, you will be able to determine how your QuickBooks Account is accessed moving forward, based on your login preferences.

If you experience any difficulty connecting in **STEP 2**, please contact support via live chat or email: <u>support@golmn.com</u>. You can also reference our Troubleshooting section in LMN Help Desk for errors experienced and methods to fix the issue.

- 1. Open your QuickBooks sync tool and click on the **Settings** tab.
- 2. Click on **STEP 2 Connect to your QuickBooks Company File** under Connections. From here, you must connect your QuickBooks Company File path in the Location section.
- 3. You have two options to retrieve your QuickBooks Company File path:
 - <u>Option 1:</u> Click 'choose' and find the company file in your computer directory. In most cases, people find this more difficult than the second option. Only choose this option if you are sure on how to locate your QuickBooks Company File.

QuickBooks Setup			
QuickBoo	oks Connectio	n Setup	
Company File:	Big Mac Landscaping.ql	bw	
File Path:			
*Note: You must have open in order asked to auth data. You mu data with Quid	QuickBooks running and the to properly set up your conr orize "LMN QuickBooks Sync" st confirm this in order to syn ckBooks.	above company file nection. You will be for access to your nchronize your LMN	Choose
		Cancel	ОК

Need help? Reach out to us at support@golmn.com

 <u>Option 2</u>: In your opened QuickBooks, use your keyboard to press "F2" or "CTRL + 1" to open your QuickBooks Product Information screen where your QuickBooks Company file path information resides. Highlight the file location, then right click > Copy – make sure you close the Product Information screen by clicking on "OK"

		Pro	duct Information		
Product Intuit Quickl Licencen number Product number User Licences Installed Product Expiry Payroll Expiry USAGE INFORMATION Date First Used 2 Audit Trail E	Books Enterprise S 6350-8070-2405-3 907-541 1 2022-09-14 2025-03-01 2025-10-01 022-06-10 Enabled since 2022-	Number of Uses	ase R5P (64-bit) CTIVATED 5_143	SERVICES INFORMATION AuthID Company Realm ID null Online Billing Token Shopping Source Token INTEGRATED APPLICATION # of apps Last accessed 202	INFORMATION 1 3/06/07 07:52:45
FILE INFORMATION Location C:\Users\Pi Mac Lands	ublic\Documents\Inti caping.qbw	uit\QuickBooks\Co	mpany Files\Big	CONDENSE INFORMATION Last run Last as of date Last payroll deleted	None None None
File Size Page Size Total Transactions Total Targets Total Links Dictionary Entries DB File Fragments Schema version	12964 K 4096 0 0 0 2 138.5	Versions Used on V32.0C R5 2023-	File 04-24	Last inventory deleted List Information Total Accounts: 61 Total Names: 29 Customers: 1 Vendors: 5 Employees: 23	None
Server IP Server Name # of Users Logged In Current Cache Size Max Cache Size	55058 192.168.76.2 QB_LMN-MARKH 1 560 14492	AM-16_32		Free Memory	865768 K
LOCAL SERVER INFOR	MATION				
Hosting: Initial Cache Cache	local files only 514 1028	Server IP Server Port Server Name	192.168.76.2 55058 QB_LMN-MARK	DB Engine version HAM-16_32	17.0.4.2182
			ок	Review last Verify / Rel	puild

4. In the QuickBooks Sync App, right click in the File Path location box and click paste > Click OK

QuickB	Books Setup uickBoc	oks Connection Setup		
Con	npany File:	Big Mac Landscaping.qbw		
	File Path:	File Path: C:\Users\Public\Documents\Intuit\QuickBooks\Company Files \Big Mac Landscaping.qbw		
*Note	*Note: You must have QuickBooks running and the above company file open in order to properly set up your connection. You will be asked to authorize "LMN QuickBooks Sync" for access to your data. You must confirm this in order to synchronize your LMN data with QuickBooks.			
		Cancel	ОК	

- 5. When you make that connection, it will open a dialog box in QuickBooks. The message will say "*Do you want to allow this application to read and modify this company file*".
- 6. Click **Yes** and choose your permission level. You have three options, based on how you want to import your data moving forward.
- 7. Finally, you will be prompted with an additional *Digital Certificate* confirmation.

Settings Instructions

STEP 3 – Choose your estimating import settings.

Once you have imported an estimate into QuickBooks for the first time, LMN QuickBooks Sync can replace each estimate with new revisions of the same estimate that you mark for export from LMN, or archive your existing estimate and import a new copy.

ଡାmn	Get Help and Traini
SYNC PROFILE	
Publish Settings	
CONNECTIONS	SETTINGS
1. Connect to your LMN account Connected as: Bbarbosa@golmn.com	3. Choose your estimating import settings Overwrite Existing, Taxes ON, Costs and Prices
2. Connect to your QuickBooks company file	4. Match LMN's cost codes + tax codes Matching Complete
Company File, bb Qbb Testing.qbw	 Set your job creation and job costing style Job Costing Style: DETAILED
	Link cost codes, staff, payroll items, and payment method Matching Complete
	7. Link your jobs to QuickBooks jobs Matching Complete
	8. Match Vendors Match I MN Vendors to QuickBooks Vendors

Choose what you would like LMN QuickBooks Sync to do with your original estimate:

- 1. Estimate Import Settings
 - Mark as InActive (recommended)
 - Replace Existing
- 2. QuickBooks Tax Settings
 - My Company charges Sales Tax (Taxes ON)
 - My Company does not charge Sales Tax (Taxes OFF)
- 3. Costs and Prices
 - Import Estimates with Prices from LMN (Prices Only)
 - Import Estimates with both Costs and Prices (Costs and Prices)

Import Settings QuickBooks Import Settings Estimate Import Settings Once you have imported an estimate into QuickBooks for the first time, LMN QuickBooks Sync can replace each estimate with new revisions of the same estimate that you mark for export from LMN, or archive your existing estimate and import a new copy. The setting below controls how LMN QuickBooks Sync behaves when attempting to import estimates that already exist in QuickBooks. Mark the Existing Estimate as 'InActive' and import a new copy of the Estimate (Keep All) Importing an estimate for a second time will deactivate the old estimate, and import a new version. If you wish to remove old versions of an estimate, you will have to remove these from QuickBooks manually. ○ Replace the Existing Estimate with the new version (Replace Existing) Importing an estimate for a second time will remove the original version of the estimate, and replace it with a new version, unless the existing estimate has any linked transactions. Old estimates removed in this fashion are deleted permanently. Quickbooks Tax Settings My Company charges Sales Tax (Taxes ON) You will need to match your LMN Taxes with QuickBooks Tax Codes in order to import estimates. \bigcirc My Company does not charge Sales Tax (Taxes OFF) When importing Estimates, LMN Sync will ignore taxes. Items will be added to QuickBooks without any tax information. **Costs and Prices** O Import Estimates with Prices from LMN (Prices Only) Use prices from LMN when importing estimates. Import Estimates with both Costs and Prices (Costs and Prices) Use costs and prices from LMN when importing estimates, to allow job costing in QuickBooks. Cancel

STEP 4 - Match LMN's cost codes + tax codes

This is where you make the connection between your LMN Cost Codes, as well as Taxes codes (if applicable). The LMN QuickBooks Sync tool will only load the screen for Tax Codes to be matched up if on **STEP 3** you've selected to have Taxes ON (My Company charges Sales Tax).

Cost Codes and Taxes will be matched directly to your QuickBooks Service Items.

SYNC PROFILE	
Sync Profile #1 (Default) ~	
Publish Settings	
CONNECTIONS	SETTINGS
1. Connect to your LMN account Connected as: Bbarbosa@golmn.com	3. Choose your estimating import settings Overwrite Existing, Taxes ON, Costs and Prices
2. Connect to your QuickBooks company file	4. Match LMN's cost codes + tax codes Matching Complete
Company File, bb Qbb Testing, qbw	5. Set your job creation and job costing style Job Costing Style: DETAILED
	 Link cost codes, staff, payroll items, and payment metho Matching Complete
	7. Link your jobs to QuickBooks jobs Matching Complete
	8. Match Vendors

From here you will land on a series of screens where you will manually match your QuickBooks items (left hand side) to your LMN items (right hand side). Once you are done, click "Next" to move forward until you are finished matching it all.

NOTE: You can not link multiple QuickBooks Service Items to a single LMN Cost Code. But you can link the same QB Service Item to multiple LMN Cost Codes.

Match Taxes	to know which QuickBoo	ks tax codes to use for your LMN items.
Drag a QuickBooks ta	x code to each LMN tax code	in order to create a match.
@ quickbooks.		ତାmn
QuickBooks Tax	Tax Name © EXMT © HST © HST(A) © ON - Tax © ON - Tax(A)	Matched To Non - Non-Taxable Sales Tax - Taxable Sales Tax - Taxable Sales Tax - Taxable Sales Tax - Taxable Sales
Cancel		Next >
Cancel JickBooks Setup Match Cost Codes Drag a QuickBo	In order to synchronize y to know which QuickBoo oks item to each LMN cost c	Next > Your estimates with QuickBooks, LMN Sync net ks items correspond to your LMN cost codes. Ode to create a match.
Cancel uickBooks Setup Match Cost Codes Drag a QuickBo @ cfuifckbooks.	In order to synchronize y to know which QuickBoo oks item to each LMN cost c	Next > Your estimates with QuickBooks, LMN Sync nee ks items correspond to your LMN cost codes. Ode to create a match.

If applicable, within this step you'll also can make a connection between QB Classes and your LMN Cost Codes.



QuickBooks Setup

Match Classes

LMN Sync can optionally apply QuickBooks Classes to your estimates if you wish.



STEP 5 - Set your job creation and job costing style.

Choose what you would like LMN QuickBooks Sync to do for Job Creation and Job Costing style here.

ତ୍ରାmn	Get Help and Training
YNC PROFILE	
Sync Profile #1 (Default) V	
Publish Settings	
ONNECTIONS	SETTINGS
1. Connect to your LMN account	3. Choose your estimating import settings
Connected as: Bbarbosa@golmn.com	Overwrite Existing, Taxes ON, Costs and Prices
2. Connect to your QuickBooks company file	4. Match LMN's cost codes + tax codes Matching Complete
Company File: bb QbD Testing.qbw	5. Set your job creation and job costing style Job Costing Style: DETAILED
	6. Link cost codes, staff, payroll items, and payment methods Matching Complete
	7. Link your jobs to QuickBooks jobs Matching Complete
	8. Match Vendors

1. Job Creation

LMN QuickBooks Sync can create jobs as part of your Timesheet or Invoice imports. By default, jobs are created using the jobsite name, but you can choose to include your LMN job IDs as part of the created jobsite names.

• To use LMN Job IDs in a Jobsite name ensure that the box is checked off.

2. Job Costing Style

LMN QuickBooks Sync can import employee hours from LMN in a number of ways.

pg. 13 support@golmn.com

- None Hours can be imported for payroll only.
- Simple Hours can be imported for payroll with allocation against jobs.
- Detailed Hours can be imported for payroll allocation against jobs and service items.

LMN QuickBooks Sync can create jo using the jobsite name, but you can names.	bbs as part of your Time a choose to include your	sheet or Invoice Imports. By default, jobs are create LMN Time Job IDs as part of the created jobsite
Use LMN Time Job IDs in .	Jobsite names	(Example: Smith Maintenance [201287]
Job Costing Style	e	
LMN QuickBooks Sync can import e	mployee hours from LN	IN Time in a number of ways. Hours can be importe
for payroll only (Job Costing Style: I for payroll with allocation against jo	NONE) , for payroll with bbs and service items (Jo	allocation against jobs (Job Costing Style: SIMPLE), b Costing Style: DETAILED).
for payroll only (Job Costing Style: I for payroll with allocation against jo • None	NONE) , for payroll with obs and service items (Jo	allocation against jobs (Job Costing Style: SIMPLE), ıb Costing Style: DETAILED).
for payroll only (Job Costing Style: for payroll with allocation against jo • None Time will be imported from LMN	NONE) , for payroll with obs and service items (Jo Time for payroll, but will n	allocation against jobs (Job Costing Style: SIMPLE), + bb Costing Style: DETAILED). ot be allocated against any particular job.
for payroll only (Job Costing Style: for payroll with allocation against jo • None Time will be imported from LMN • Simple	NONE) , for payroll with obs and service items (Jo Time for payroll, but will n	allocation against jobs (Job Costing Style: SIMPLE), b Costing Style: DETAILED). ot be allocated against any particular job.
for payroll only (Job Costing Style: for payroll with allocation against jo None Time will be imported from LMN Simple Time will be imported from LMN order to enable simple job costin	NONE), for payroll with obs and service items (Jo Time for payroll, but will n Time for payroll, and will l ig.	allocation against jobs (Job Costing Style: SIMPLE), v bb Costing Style: DETAILED). ot be allocated against any particular job. pe allocated against the appropriate QuickBooks jobs, in
for payroll only (Job Costing Style: for payroll with allocation against jo None Time will be imported from LMN Simple Time will be imported from LMN order to enable simple job costin O Detailed	NONE), for payroll with bbs and service items (Jo Time for payroll, but will r I Time for payroll, and will I g.	allocation against jobs (Job Costing Style: SIMPLE), o bb Costing Style: DETAILED). of be allocated against any particular job. be allocated against the appropriate QuickBooks jobs, in
for payroll only (Job Costing Style: for payroll with allocation against jo None Time will be imported from LMN Simple Time will be imported from LMN roder to enable simple job costin Detailed Time will be imported from LMN service items. NOTE: This option	NONE), for payroll with obs and service items (Jo Time for payroll, but will r Time for payroll, and will I g. Time for payroll, and will I requires your LMN cost co	allocation against jobs (Job Costing Style: SIMPLE), o bb Costing Style: DETAILED). of be allocated against any particular job. be allocated against the appropriate QuickBooks jobs, in be allocated against the appropriate QuickBooks jobs and odes to be matched to QuickBooks service items.

STEP 6 - Link cost codes, staff, payroll items, and payment methods

This is where you make the connection between your LMN Cost Codes, Classes (if applicable), Employees, Payroll Items and Payment Types. These items will be matched directly to your QuickBooks Service Items, Classes, Taxes, Payroll Items, and Payment Types so LMN data can import successfully into your QuickBooks Account.

LMN QuickBooks Sync v3.8.0.0 [connecting to https://syncapi2.golmn.com/]	×	
ତାmn	Get Help and Training	
SYNC PROFILE		
Sync Profile #1 (Default) V		
Publish Settings		
CONNECTIONS	SETTINGS	
1. Connect to your LMN account Connected as: LMN Academy	3. Choose your estimating import settings Inactivate Existing, Taxes ON, Costs and Prices	
2. Connect to your QuickBooks company file	4. Match LMN's cost codes + tax codes Matching Complete	
Company File, big Mac Lanuscaphig.quw	5. Set your job creation and job costing style Job Costing Style: DETAILED	
	 Link cost codes, staff, payroll items, and payment methods Matching Complete 	
	7. Link your jobs to QuickBooks jobs Matching Incomplete	
	8. Match Vendors Match LMN Vendors to QuickBooks Vendors	
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- 1. Again, here you will land on a series of screens where you will manually match your QuickBooks items (left hand side) to your LMN items (right hand side).
- 2. To match an item: Click on the QuickBooks item and drag it to the corresponding LMN item.
- 3. Once you have completed your matching for your page, click **Next** > to move forward.
- 4. For Payment Settings, you will also be prompted to choose the default deposit and Q/R account that LMN Sync should use for payments imported from LMN. Select the desired ones and click Next > Ok to finish matching your items.

QuickBooks Setup				
Choose Payment Sett	tings	Almost there! Choc LMN Sync should u	use the default depositions for payments impo	t and A/R accounts that irted from LMN.
Select the appropriate	e accounts f	to use from the selec	ctions provided belo	ow.
Default QuickBooks Deposit Account:	Advance (Customer Payments	\sim	
Default QuickBooks A/R Account:	Accounts/	Receivables	~	
Cancel			< Back	Next >



STEP 7 - Link your LMN jobs to QuickBooks jobs

To do proper Job Costing in QuickBooks, LMN QuickBooks Sync needs to know which LMN Time jobs correspond with which QuickBooks jobs or customers.

LMN QuickBooks Sync v3.8.0.0 [connecting to https://syncapi2.golmn.com/]	×
©Imn	Get Help and Training
SYNC PROFILE Sync Profile #1 (Default)	
CONNECTIONS SE	TTINGS
1. Connect to your LMN account Connected as: LMN Academy	3. Choose your estimating import settings Inactivate Existing, Taxes ON, Costs and Prices
2. Connect to your QuickBooks company file	4. Match LMN's cost codes + tax codes Matching Complete
Company File: big Mac Lanoscaping.qow	5. Set your job creation and job costing style Job Costing Style: DETAILED
	6. Link cost codes, staff, payroll items, and payment methods Matching Complete
	7. Link your jobs to QuickBooks jobs Matching Incomplete
	8. Match Vendors Match LMN Vendors to QuickBooks Vendors
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Here you will match your existing QuickBooks jobs to your LMN Jobs. To match a job, click on the QuickBooks job in the left menu and drag it to the corresponding LMN Job in the right menu. Once you have completed your matching, click **Next >** to move forward.



STEP 8 – Link Vendors

Your LMN Vendors must be matched to QuickBooks Vendors in order to import your LMN Vendor Bills into QuickBooks.



Publish Instructions

Publish Estimates

When an estimate has been won/sold, you can import it into QuickBooks for Job Costing purposes. To import an estimate into QuickBooks, follow the instructions below.

To import an estimate into QuickBooks you need to mark the estimate for QuickBooks export. There are two options to complete this task:

• Option 1: While in an estimate click **Customer Info** in the tabs at the top. At the bottom of the screen, click **Mark for QuickBooks Export.** It will now be in your QuickBooks export queue.

Cin		306 MADISON	AVENUE DESIGN-BUILD MAY 24 CD	
0	Deshboards			
٢	Budget	Customer Info Worka	areas + Pricing Contract Client Notes Crew Notes Analysis Pr	init Reports Classic Reports Files Portal SiteOne Orders
⊨		Estimate Informatio	n	Client Information
۵		Project Name	306 Madison Avenue Design-Build MAY 24 CD	Client Name E Mark Johns
R		Estimate ID	EST3908534 Version # Version	Billing Address 107 William Booth Avenue Newmarket, Ontario L3X 3B2
		Relations	None 👻	Contact Name Mark Johns
	Estimate List	Estimate Date	23-May-2023	Contact Info p. 1-888-347-9864 e. <u>christianlmnacademy@gmail.com</u>
		Estimate Close Date		Jobsite Name Mark's Rental House
+		Division	Research and	Jobsite Address 306 Madison Avenue Toronto, Ontario MSR 256
- 1.			restrand	Referral Social Media
8		Estimate Status	In Progress	Ref. Note Mark knew about us based on the Social Media ad he came across last mo
	Schedule	Exclude from Stats?	When checked, excludes this estimate from dashboard stats + CRM reports	Map Site P Change Client/Jobsite
0	Timesheets	Estimate Assignmer	nts	
		_	-	
W	myokes		2 . .	
D	Reporte	Salespe	erson Esomator	Confidence Level Updated By
0	Quickbooks	LMN Academy	LMN Academy *	Aliza Hussain Nav 24 2023 10:24AM
۲	Greenius			50%
		Back to Estimates	Back to CRM	🕞 Create job: 📣 Mark for Q8 Export. 😰 Copy 🗮 Archive 📲 Delete 🔒 Save
Ð	Help & Resources			

• Option 2: In your LMN Menu, click **QuickBooks** then **Export**. This is your where you can also search for estimates to add to your export queue. If you click the export queue tab at the top, you will see all of estimates that are available to import into QuickBooks when using the LMN QuickBooks Sync App. This is also where estimates go when you click **Mark for QuickBooks Export** while in an actual estimate.

ତି In)	🔶 QUICKB	OOKS EXPO	RT			
ø	Dashboards				_			
٢	Budget		Estimate Search	Export Que	16			
≘	CRM		Add	Est. ID	Date	Project Name / Address	Customer	Status
_			Cancel Export	EST3111485		63 Forester Crescent Design-Build 2022	Mark Johns	Sold
	esomates		Cancel Export	EST1589871		92 White Heather Boulevard Maintenance 2022	Christian Bseliss	Sold
â			10 Cancel Export	EST2005185		VIRTUAL TEAM MTNC 2023	Virtual Residence	Sold
۵	Schedule							
	Timesheets							
6						Publish	to Quickbooks Online 🛛 📥 Run Quickbo	ooks Desktop Sync
۵	Reports							
0								
	Export >							
	QB Online							
۲	Greenius							

Now that you have an estimate queued for export, head back to the LMN QuickBooks Sync App.

• Under the **Publish** tab, click **Publish Estimates**. This will bring up all your estimates that are in your QuickBooks export queue.

5	Import	Estimates						- 🗆 🗙		
	Synchronize with QuickBooks Use the list below to prepare your estimates for import into QuickBooks. Once you are satisfied with your changes, click 'Sync Now' to import your estimates.									
\$	tandard l	Estimates	Service	Estimates						
	Include	Est. ID	Version	Date	Customer	Address	Project Name	Import Type		
		EST15		15-Feb-2022	Christian Bseliss	92 White Heather Boule	92 White Heather Boulevard	Detailed		
	\checkmark	EST20		23-Feb-2023	Virtual Residence	1445 Rosebank Road Pi	VIRTUAL TEAM MTNC 2023	Detailed		
						Cancel	Sy	nc Now		

- There are two separate sections in the import list. Use the tabs available to see the Estimates you wish to publish. It is also very important to scroll to the right before you import. This is where you can match to customer that is already in QuickBooks. If you do not match it will create a new project in QuickBooks for you under a new customer.
 - Standard estimates
 - Service estimates

Import E	stimates					_		×
Sync	hronize with	n QuickBooks	Use the list bel QuickBooks. O 'Sync Now' to i	ow to pre nce you a mport you	pare you re satisfie ur estimat	r estimates for imp ed with your chang tes.	ort into es, click	
Standard Est	timates Service Estimates							
	Address	Project Name	Import Type			Import Status		
	63 Forester Crescent M	63 Forester Crescent Design	Detailed (Print Details)	∼ Mat	ch Job	New Customer:New	w Job	
٤								>
			Cancel			Sync Now		

Click on "Sync Now" and congratulations! You've imported your estimate into QuickBooks!

Import Customers/Jobs

If you are new to LMN and want to get your QuickBooks customers imported into your CRM, we have the steps below for you to do so!

NOTE: We recommend that you clean up your customer data prior to importing. You can do this by following these steps.

To cleanup your QuickBooks customer list:

- Deactivate any inactive customers.
- Add first/ last names to any customer missing this data.
- Review your customers jobsites to ensure they are accurate.
- Review all data to ensure it is accurate.

To import your customers:

- 1. Click on **Publish** in your LMN QuickBooks Sync App.
- 2. Click Import Customers/Jobs

DIMN QuickBooks Sync v3.8.0.0 [connecting to https://syncapi2.golmn.com/]	×
ତ୍ରାmn	Get Help and Training
SYNC PROFILE	
Sync Profile #1 (Default) ~	
Publish Settings	
ESTIMATING	TIME
Publish Estimates	Publish Time
Publish estimates from LMN to QuickBooks	Publish hours from LMN Time to QuickBooks
Import Customers/Jobs	Publish Invoices
Import customer data from QuickBooks to LMN	Publish invoices from LMN Time to QuickBooks
	Publish Payments
	Publish payments from LMN Time to QuickBooks
	Publish Vendor Bills
	Publish Bills from LMN Time to QuickBooks
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3. **Import Options** – Choose whether you want to import inactive QuickBooks customers as Leads or ignore them.

In	nport QuickBooks Customers/Jobs into LMN
Use Whe	the options below to specify how the import should treat any QuickBooks customers marked as inactive n you are ready to proceed, click the button marked 'Run Import'.
Imp	ort Options
۲) Ignore inactive QuickBooks Customers The impact will king any Quickbooks customers of iche marked as inactive
0	Ine Import will skip any Quickbooks customers of Jobs Marked as inactive.
	/ import inactive Quickbooks customers as leads

4. Click Run Import

Publish Time

Olmn

If you will be processing payroll via QuickBooks, follow the instructions below:

- 1. To import your employee's timesheets into QuickBooks for payroll and job-costing, you will need to ensure that your timesheets for that pay period are all under approved status. We recommend that you review and approve timesheets daily.
 - To do this, go into the LMN menu and click Approve under the Timesheets options.

NOTE: For more information on reviewing and approving time, please access our LMN Help Desk or LMN Academy Online.

Once your timesheets for your payroll period have been Approved, go to your LMN QuickBooks Sync tool, and click on **Publish**, then click on **Publish Time**.

LMN QuickBooks Sync v3.8.0.0 [connecting to https://syncapi2.golmn.com/]	×
ଡାmn	Get Help and Training
SYNC PROFILE	
Sync Profile #1 (Default)	
Publish Settings	
ESTIMATING	гіме
Publish Estimates	Publish Time
Publish estimates from LMN to QuickBooks	Publish hours from LMN Time to QuickBooks
Import Customers/Jobs	Publish Invoices
Import customer data from QuickBooks to LMN	Publish invoices from LMN Time to QuickBooks
	Publish Payments
	Publish payments from LMN Time to QuickBooks
	Publish Vendor Bills
	Publish Bills from LMN Time to QuickBooks
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2. Pick your Payroll Period Duration and Start Date > Click Next

Import Time from LMN Time								
Select Dates	Choose the period for which you wish to import time into QuickBooks							
Please choose the period and	start date for which you would like to import hours into QuickBooks.							
Import time fo	r the two weeks starting \checkmark on Mon Jun 5, 2023							
Clic	Click Next when you are ready to continue.							
You must be logged into QuickBooks with an administrator account in order for LMN Sync to work properly. Cancel Next >								

- 3. Select the Employees whose time you wish to import for the time period selected.
 - If you are planning on importing the time of all employees leave all employees checked off.
 - In certain cases, you may be importing the time for only a select number of your employees. In those cases, click the select employees' option at the top, then either uncheck the employees that are not included in the import, or click deselect all and then check off the employees that are going to be included in the import.

Import Time from LMN Time			
Select Empl	oyees Sele	ect the Employees whose t ected	ime you wish to import for the time period
All Employees	Select Employees		
🗹 🚨 academy Imntest	🗹 🚨 Alex Smith	🗹 🚨 Aliza Hussain	🗹 🚨 Amanda P
🗹 🚨 Arthur Reed	🗹 🚨 Chris Davies	🗹 🚨 Christian Bseliss	🗹 🚨 Corey S
🗹 🚨 Donna Paulsen	🗹 🚨 Donna 🛛 R	🗹 🚨 Dwight K. Schrute	e
🗹 🚨 George Brown	🗹 🚨 Grace M	🗹 🚨 Jai Somani	🗹 🚨 Jeremy Thompson
🗹 🚨 Jim Halpert	🗹 🚨 Jose M	🗹 🚨 Kelly M	🗹 🚨 Kim Z
🗹 🚨 Larissa H	🗹 🚨 LMN Academy	🗹 🚨 Mae D	🗹 🚨 Marc M
🗹 🚨 Mark Bradley	🗹 🚨 Marlen G	🗹 🚨 Michael Scott	🗹 🚨 Nancy Walmsley
🗹 🚨 Nicole 🛛 🛛	🗹 🚨 Pamela Beezly	🗹 🚨 Rob G	🗹 🚨 Roger M
🗹 🚨 Tom Schrieber	🗹 🚨 Tracy S		
Cancel			< Previous Next >

4. Once you have determined which employees you are importing time for, click Next.

NOTE: If an error does occur, it is typically an easy fix and due to only a few different reasons. You should open the log and go back to those specific timesheets to pinpoint the issue:

- The time for the task being imported does not have a task associated with it. Assign a cost code in your task setup for that specific job.
- A payroll code is not set correctly. Refer to STEP 2 in this guide.
- If you need assistance, please contact support via live chat or email: *support@golmn.com*

Publish Invoices

When your invoices have been generated and in **Approved** status, you will want to import them into QuickBooks for Job Costing purposes.

1. Before you begin publishing Invoices, you will need to update their status to **Export to QuickBooks**.

ତାn		\$	INVOICES										
®	Dashboards Budget	searc	ch invoice #, customer, job	earch	Invoice Group All Groups	 From May 14, 20 	23 🖻	Te Jun 9, 2023	Status Approved	* 🗌 Poi	tal Customers	Only	14
	Price List CRM	U	pdate Invoices - Merge Change Status	•									5 invoice(s).
	Estimates	C	Change Date Export to QB Set to Exported		Invoice Date	Customer Name		Job 🔨	Status	Portal	Closed	Total \$567.40	Balance \$567.40
5 ()	Schedule Timesheets		Set to Closed Send/Publish Invoices Send Invoice Deminders		Wed May 31, 2023	Mark Johns		Mjohns - 638 Irwin Crescent Maintenance MAY 15TH	Approved	~		\$310.75	\$310.75
6			Hide from Portal		Thu Jun 8, 2023	Mark Johns		92 White Heather Boulevard-De Build-May30th	Approved	~		\$3,190.69	\$3,190.69
l	Generate Invoice Runs) INV-2457		Wed May 31, 2023	Mark Johns		638 Irwin Crescent Maintenan MAY 8TH	ce Approved	~		\$316.40	\$316.40
4		C] INV-2495		Thu Jun 1, 2023	Home Depot Can	ada	1105 Kingston Road Design- Build 2023	Approved			\$153,863.01	\$153,863.01

2. Once ready, go to your LMN QuickBooks Sync App, click Publish and then Publish Invoices.

LMN QuickBooks Sync v3.8.0.0 [connecting to https://syncapi2.golmn.com/]	×
ଡିlmn	Get Help and Training
SYNC PROFILE Sync Profile #1 (Default)	
ESTIMATING	TIME
Publish Estimates Publish estimates from LMN to QuickBooks	Publish Time Publish hours from LMN Time to QuickBooks
Import Customers/Jobs Import customer data from QuickBooks to LMN	Publish Invoices Publish invoices from LMN Time to QuickBooks
	Publish Payments Publish payments from LMN Time to QuickBooks
	Publish Vendor Bills Publish Bills from LMN Time to QuickBooks
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- 3. Here you will see a list of Invoices ready to be Published into QuickBooks.
- 4. Review your customer matching information on the **Import Status** column to ensure they are matching to the right customer. If not, click **Match** to look for a QuickBooks customer to adjust it.

Import	t Invoices					-		×
lm	port l	nvoices	Use the list below import into QuickB	to review your custome ooks. Once you are re	er matching information, and prej ady, click 'Sync Now' to import ye	oare your our invoic	invoices es.	for
Include?	Invoice #	Date	Customer	Jobsite Name	Address	&	<u>ii</u>	^
	INV-2	17-Dec-2020	Lucy Chu	Lucy - Home	35 Walden Street Markha			
	INV-547	01-Mar-2021	Nick Ossello	Nick Ossello Jobsite	539 Lekani Court Pickerin			
	INV-386	04-Mar-2021	#SAMPLE#	#SAMPLE# Jobsite	180 Enterprise Boulevard			
	INV-396	04-Mar-2021	#SAMPLE#	#SAMPLE# Jobsite	180 Enterprise Boulevard			
	INV-397	04-Mar-2021	#SAMPLE#	#SAMPLE# Jobsite	180 Enterprise Boulevard			
	INV-420	04-Mar-2021	#SAMPLE#	#SAMPLE# Jobsite	180 Enterprise Boulevard			
	INV-425	11-Mar-2021	Lucy Chu	Lucy - Cottage	29 Macklin Street Markha			
	INV-426	11-Mar-2021	Ryder Gamsey	Ryder Gamsey Jobsite	1858 Woodview Avenue			
	INV-427	11-Mar-2021	Garrett Epple	Garrett Epple Jobsite	574 Dahlia Crescent Pick			
	INV-428	11-Mar-2021	Miles jones	Myles jones Jobsite	1796 Pine Grove Avenue			
	INV-429	11-Mar-2021	Nick Ossello	Nick Ossello Jobsite	539 Lekani Court Pickerin			
<								>
					Cancel	Sync	: Now	

- 5. If the invoice is for a brand-new customer and they haven't been created, you can just leave the default and LMN will create the customer and job for you in QuickBooks.
- 6. Once all the information is verified, click **Sync Now**, and once complete you can exit the LMN QuickBooks Sync App. Invoices will now be in your QuickBooks!

NOTE: LMN's invoice number will appear in the memo section of your invoice in QuickBooks. LMN allows the QuickBooks invoice number to be the default number to avoid any duplication or errors. In LMN, once an invoice has been exported, the accounting Invoice number will now be updated from the QuickBooks invoice number.

Publish Payments

After Payments have been processed in LMN's Customer Portal or Admin, you will want to import them into QuickBooks for proper reporting.

1. Go to your LMN QuickBooks Sync App, click Publish and then Publish Payments.

LMN QuickBooks Sync v3.8.0.0 [connecting to https://syncapi2.golmn.com/]	×
ଡାmn	Get Help and Training
SYNC PROFILE	
Sync Profile #1 (Default) V	
Publish Settings	
ESTIMATING	TIME
Publish Estimates	Publish Time
Publish estimates from LMN to QuickBooks	Publish hours from LMN Time to QuickBooks
Import Customers/Jobs	Publish Invoices
Import customer data from QuickBooks to LMN	Publish invoices from LMN Time to QuickBooks
	Publish Payments
	Publish payments from LMN Time to QuickBooks
	Publish Vendor Bills Publish Bills from LMN Time to QuickBooks
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- 1. On the Import Payments screen, you will see a list of payments set to be *Exported to QuickBooks*.
- 2. Use the *Publish?* Checkboxes to select the payments you wish to publish over to QuickBooks and click **Sync Now**.

Publish Vendor Bills

First, ensure that you have the LMN QB Sync desktop App installed and your tax codes are matched. If you have not installed the Sync App, refer to the beginning of this guide:

Once your LMN account is connected to your QuickBooks Desktop account, you'll first want to match your existing vendors. In the LMN QB Sync desktop App under Settings, click Match Vendors

LMN QuickBooks Sync v3.8.0.0 [connecting to https://syncapi2.golmn.com/])				
ତ୍ରାmn	Get Help and Training				
SYNC PROFILE					
Sync Profile #1 (Default) ~					
Publish Settings					
CONNECTIONS	SETTINGS				
1. Connect to your LMN account	3. Choose your estimating import settings				
Connected as: LMN Academy	Inactivate Existing, Taxes ON, Costs and Prices				
2. Connect to your QuickBooks company file	4. Match LMN's cost codes + tax codes Matching Complete				
CONNECTIONS SETTINGS	5. Set your job creation and job costing style Job Costing Style: DETAILED				
	6. Link cost codes, staff, payroll items, and payment methods Matching Complete				
	7. Link your jobs to QuickBooks jobs Matching Incomplete				
	8. Match Vendors Match LMN Vendors to QuickBooks Vendors				
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Next, you will have the option to match the Vendor from your LMN account to the corresponding Vendor in your QuickBooks Desktop account, if there are new Vendors that you have added to the CRM in LMN, you will not select a QuickBooks Vendor, but use the Create option and have LMN create the vendor in your QuickBooks Desktop account automatically.

Match Vendors	Your LMN Vendors must be matched Vendor Bills into QuickBooks. Use the each of your LMN Vendors to.	to QuickBooks Vendors in order list below to choose which Quic	to impor kBooks V	t your LMN endor to m
LMN Vendor	Address	Quickbooks Vendor		
#SAMPLE#	180 Enterprise Boulevard Markham, Ontario	<not matched=""></not>	~	Create
#TEMPLATES#	180 Enterprise Boulevard Markham, Ontario	<not matched=""></not>	~	Create
#TEMPLATES#	180 Enterprise Boulevard Markham, Ontario	<not matched=""></not>	~	Create
Arden Scott	78 Marcus Crescent Markham, ON L3P7A7	<not matched=""></not>	~	Create
Ashley Smith	322 Paliser Crescent S Richmond Hill, ON L4	<not matched=""></not>	~	Create
Home Depot		Home Depot Canada	~	
Home Depot		Home Depot Canada	~	
Home Depot		Home Depot Canada	~	
Home Depot		Home Depot Canada	~	
Home Depot		Home Depot Canada	~	
Home Depot	123 Anywhere Street Toronto, Ontario m1w 2	<not matched=""></not>	~	Create
Home Depot Canada	1 Concorde Gate, Suite #400 North York, O	<not matched=""></not>	~	Create
LMN	180 Enterprise Boulevard Markham, Ontario	<not matched=""></not>	~	Create
Lowes Canada - Markham	6005 Steeles Avenue East Toronto, Ontario	<not matched=""></not>	~	Create
			1	<u> </u>

Once you have made all of your matches, or opted to Create new, click Save and Close.

Now that all existing vendors have been matched between your LMN and QuickBooks Desktop accounts, you can proceed with exporting the Vendor Bills. To find and review which vendor bills are to be exported, login to your LMN account and under the **Jobs** menu, click **Vendor Bills**

bin			Vendor Bills						
Ø	Deshboards	Ĩ	Q Search						
٢	Budget								
	Price List		Bill Date	Vendor	Bill Ref #	PO #	Quickbooks	Allocated	Total Cost
۲	CRM		🗍 Jun 12, 2023	Home Depot	1234	5678		0	\$338.77
	Estimates		Un 8 2022	Home Depot	12291			•	\$250.00
		~	June, 2023	Home Depor	122,31			×	\$230,00
			🗍 Jun 7, 2023	Home Depot Canada	1541523451		QUEUED	•	\$84.75
	Update Jobs Job Groups		Jun 5, 2023	Home Depot	2532				\$25.00
			🗍 Jun 5, 2023	Home Depot	158941	1010101		0	\$293.57
	Vendor Bills	>	May 31, 2023	Lowes Canada - West Ontario	1313	2255	EXPORTED		\$6,000.00
۵	Schedule		May 30, 2023	Home Depot Canada	1852452431				\$21.19
	Timesheets Involces		May 29, 2023	Home Depot	1195	1295	EXPORTED	0	\$259.80
©	Help & Resources Settings		Items per page 25	1-25 of 38 Results					•

Use the selection box to the left of each Vendor Bill to select the items to be exported to QuickBooks. Once selected, there will be an option to **Export to QB**.

pg. 27 support@golmn.com

bin		Vei	ndor Bills						
Ø	Deshboerds	Q							
٢	Budget								
≣	Price List	۰	Bill Date	Vendor	Bill Ref #	PO #	Quickbooks	Allocated	Total Cost
۵	CRM		Jun 12, 2023	Home Depot	1234	5678		0	\$338.77
	Estimates								445510000
		0	Jun 8, 2023	Home Depot	12231			0	\$250.00
-			Jun 7, 2023	Home Depot Canada	1541523451		QUEUED	0	\$84.75
ļ	Update Jobs Job Groups		Jun 5, 2023	Home Depot	2532				\$25.00
			Jun 5, 2023	Home Depot	158941	1010101		0	\$293.57
4	Jobsite Watch								
•	Vendor Bills	0	May 31, 2023	Lowes Canada - West Ontario	1313	2255	EXPORTED		\$6,000.00
۵	Schedule		May 30, 2023	Home Depot Canada	1852452431				\$21.19
0	Timesheets		May 20, 2022	Hama Danat	V (E) Selected	C+	CURRENT CO.		\$250.00
ß			may 29, 2023	Home Depor	A (B) Selected	Export to QB	EXPORTED		\$253.60
Ø	Help & Resources	Items	s per page 25 👻	1-25 of 38 Results < 🔪					•
ø	Settings								

A notification will appear to indicate the total number of selections that have are ready to be exported

ତାn		Vendor Bil	lls				5 vendor bills qu	eued for QB export. 🛞
Ø	Deshboerds	Q. Search			/			
٢	Budget							
E	Price List	Bill Date	Vendor	Bill Ref #	PO #	Quickbooks	Allocated	Total Cost
٤	CRM	🗍 Jun 12, 2023	Home Depot	1234	5678	QUEUED	•	\$338.77
	Estimates	□ lun 8 2023	Home Depot	12231				\$250.00
		50110,2023	nome pepor	122.51			~	3230.00
+		🗍 Jun 7, 2023	Home Depot Canada	1541523451		QUEUED	0	\$84.75
1	Update Jobs Job Groups	🗍 Jun 5, 2023	Home Depot	2532		QUEUED		\$25.00
-	Scorecards	Jun 5, 2023	Home Depot	158941	1010101	QUEUED	0	\$293.57
Ļ	Jobsite Wetch Vendor Bills	May 31, 2023	B Lowes Canada - West Ontario	1313	2255	EXPORTED		\$6,000.00
Ċ	Schedule	May 30, 202	3 Home Depot Canada	1852452431		QUEUED		\$21.19
© R	Timeshoets Invoires	May 29, 202	3 Home Depot	1195	1295	QUEUED		\$259.80
@ @	Help & Resources Settings	Items per page	25 • 1-25 of 38 Results	>				•

The selected Vendor Bills are now ready to be exported to your QuickBooks account in the LMN QB Sync desktop App.

1. Go to your LMN QuickBooks Sync App, click Publish and then Publish Vendor Bills.

LMN QuickBooks Sync v3.8.0.0 [connecting to https://syncapi2.golmn.com/]	×
©lmn	Get Help and Training
SYNC PROFILE	
Sync Profile #1 (Default) ~	
Publish Settings	
ESTIMATING	TIME
Publish Estimates	Publish Time
Publish estimates from LMN to QuickBooks	Publish hours from LMN Time to QuickBooks
Import Customers/Jobs	Publish Invoices
Import customer data from QuickBooks to LMN	Publish invoices from LMN Time to QuickBooks
	Publish Payments
	Publish payments from LMN Time to QuickBooks
	Publish Vendor Bills Publish Bills from LMN Time to QuickBooks
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2. Next, using the dropdown options, select the Vendor and QuickBooks Account to export the vendor bills

Import	Vendor Bills		the day list boly							-	
Imp	oort Ve	endor Bills	click 'Sync Now'	w to review to import y	our bills.	cpense account matching ir	nformation	n, and prepare y	our bills for import into Quic	KBOOKS. Once you a	irê ready,
Included	Date	Vendor	Bill Ref#	PO#	Total Price	Quickbooks Vendor		Quickbooks Accou	int		
	29-May-2023	Home Depot	1195	1295	\$259.80	Home Depot Canada	~	Vendor Payables	~		
	30-May-2023	Home Depot Canada	1852452431		\$21.19	Home Depot Canada	~	Vendor Payables	~		
	05-Jun-2023	Home Depot	158941	1010101	\$293.57	Home Depot Canada	~	Vendor Payables	~		
	05-Jun-2023	Home Depot	2532		\$25.00	Home Depot Canada	~	Vendor Payables	~		
	07-Jun-2023	Home Depot Canada	1541523451		\$84.75	Home Depot Canada	~	Vendor Payables	~		
	12-Jun-2023	Home Depot	1234	5678	\$338.77	Home Depot Canada	~	Vendor Payables	~		
(6) Ven	ndor Bills rea	ady for import.							Cancel	Sync Now	r (6)

Once the export is completed, you will now be able to see the Vendor Bills in the specified QuickBooks account.

	Big M	ac Landscaping - Intuit QuickBooks Enterprise Solutions 22.0 - [Account QuickReport]	_ @
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Snapshots		TOTAL	
Customers		a de la companya de la	
Vendors			
Employees			

If any errors occur during the export, you will be provided with a document to determine which vendor bills need correcting.

			- 0
nport Vendor Bills	Use the list below to review your vendor and expense account matching information, and pre click 'Sync Now' to import your bills.	pare your bills for import into QuickBooks. C	ince you are r
	Synchronization Completed with Errors.		
Synch	ronization has completed, but 4 of your validated bills could not be imported into Qu	lickBooks due to errors.	
	Please review the import log to see why these bills could not be import	ed.	
	The bills you've imported will now appear in your QuickBooks company	file.	
	Click here to view the import log file		
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Once corrected, go through the export process again to export the Vendor Bills to QuickBooks