QuickBooks Online Integration Setup Guide

General Setup Instructions

STEP 1: Granting Users Permission to Sync Information to Accounting

The first step in syncing LMN with QuickBooks Online is to establish a connection between your 2 accounts.

We strongly recommend only a few key people in your company have access to syncing information. Putting any accounting information through a 'gatekeeper' will ensure clean data and that estimates get sync'd to the correct customers, and that you don't end up with duplicates.

To complete this process, follow these steps:

1. In the LMN Settings menu, click **LMN Users** under the **Users & Staff** settings.
2. Click the name of the user to whom you want to grant account permission.
3. When the user screen opens, click the **Permissions** tab.
4. Make sure the user's **LMN Accounting** permission is set to **Full Access**
5. Click **Save** to save changes to the user.
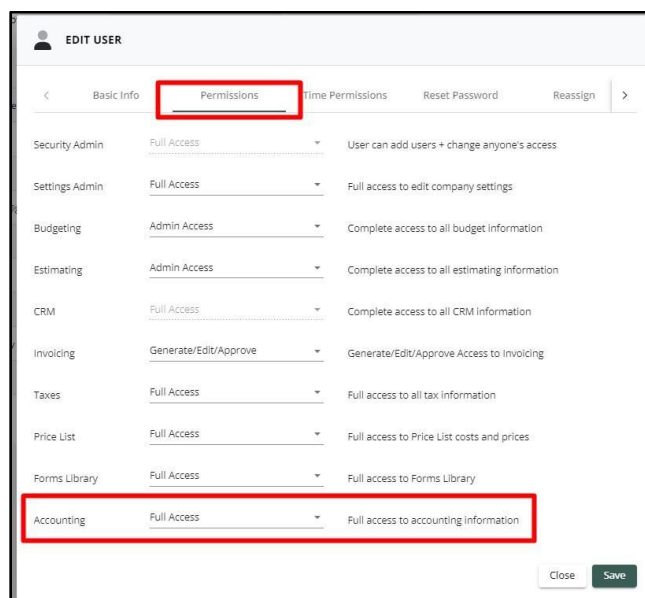
STEP 2: Accessing the LMN QuickBooks Online Sync Tool

Accessing the Sync tool is very simple. Simply follow these steps:

1. Using the LMN menu, click the **QuickBooks** menu.
2. Click the **QuickBooks Online** sub menu.
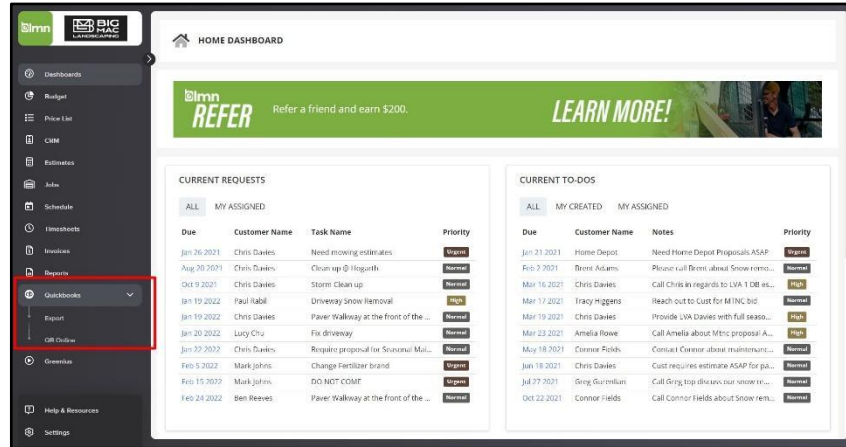
3. These actions will open a new tab in your browser where you will be prompted to re-enter your username and password. Remember, only LMN users who have **LMN Accounting** permissions set to **Full Access** can login to the Accounting Sync tool.

   Note - if you access this page frequently, you can set a bookmark.
   *to: https://accounting.golmn.com - note that your login **WILL NOT WORK** without the 's' at the end of 'https'. This ensures a secure connection.*

4. Enter your username and password on the login screen.

lmn
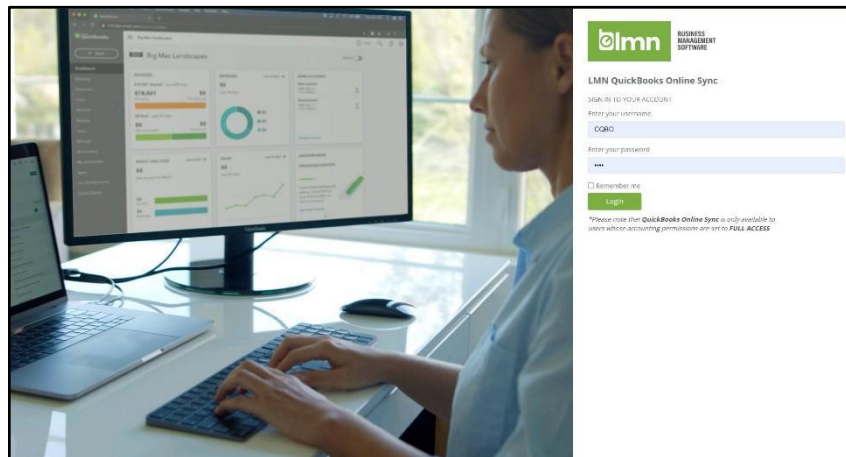
STEP 3: Linking Your LMN Cost Codes with QuickBooks Online Service Items and Classes

Before you start exporting estimates and timesheets, you need to link some basic configuration information between LMN and QuickBooks Online. The most important is linking LMN Cost Codes with QuickBooks Online Service Items.

What does a QuickBooks Online Service Item do?

You'll need a QuickBooks Service Item in your Chart of Accounts *so that LMN puts the revenue, or cost, in the correct account. When LMN exports an estimated line item, or a timesheet, those items reference a QuickBooks Online Service item which, in turn, tells QuickBooks Online what account to store the revenue (for estimates/invoices) or cost (for timesheets) information in.*

Do you have a recommended list of QuickBooks Online Service Items?

*Because landscape companies do a wide variety of work, every company has different needs for service items. However, in the **Attachments** section of this article, you will find 2 documents:*
- *A sample list of QuickBooks Chart of Accounts*
- *A sample list of Service Items and what Chart of Accounts they link to.*

Linking LMN Cost Codes to QuickBooks Online Service Items (mandatory)

1. From the LMN QuickBooks Online Sync app (*https://accounting.golmn.com*) open the **Setup** menu on the left side
2. Choose the **Link Service Items** option.
3. Your LMN **Cost Codes** show on the left. Your QuickBooks **Service Items** show on the right. For each LMN Cost Code, assign the QuickBooks Online Service item that you want it to link to.
   - *Each LMN estimate is assigned to LMN Cost Codes. These cost codes link to QuickBooks Online Service Items, which link to QuickBooks Chart of Accounts. By linking LMN cost codes to QuickBooks Online service items, the revenue from the LMN estimates gets entered to the correct QuickBooks Online revenue account.*
   - *LMN jobs have a Cost Code assigned to each task. Because the **LMN Cost Codes** link to **QuickBooks Online Service Items** (which link to QuickBooks Online Chart of Accounts), the payroll costs end up getting entered in the correct account.*

Need help? Reach out to us at support@golmn.com
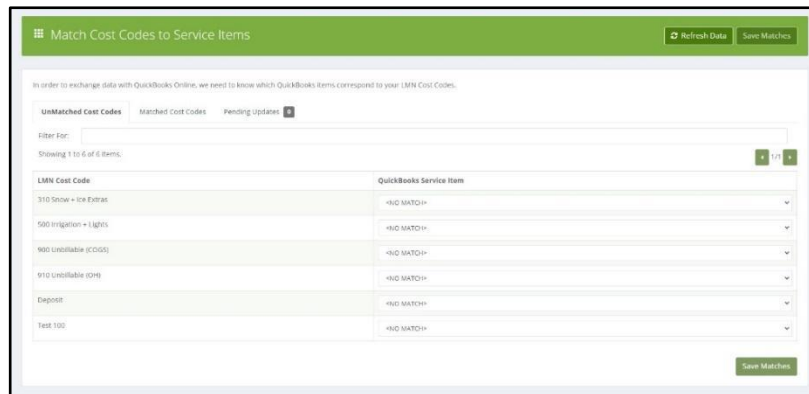
4. It's OK if more than one LMN Cost Code matches to the same QuickBooks Service item, but it would be unusual to set it up that way.
5. When you match a QuickBooks Service item, it disappears from the **Unmatched Cost Codes** tab and is moved to the **Pending Updates** tab.
6. When you're finished all your matching, you can review your matches by clicking the **Pending Updates** tab. If you have made changes, there will be a green numbered box beside this tab indicating how many changes are pending.
7. Click **Save Matches** to save your matched settings.

Linking LMN Cost Codes to QuickBooks Classes (OPTIONAL-only for companies using Classes)

1. *Make sure your QuickBooks Classes are set to row-based transaction.* [Click here](#) *for more information on QuickBooks Classes,*
2. From the LMN QuickBooks Online Sync app open the Setup menu on the left side.
3. Choose the Link Classes menu option.
4. Assign each LMN Cost Code (left side) to a corresponding QuickBooks Class (right side). It's OK and *it's completely normal if more than one LMN Cost Code matches to the same QuickBooks Class. Usually, you'd have multiple LMN Cost Codes (e.g., Planting, Lighting, Carpentry) all matching to one QuickBooks Class (e.g., Installation Division)*
    *   *When exporting estimates or timesheets to QuickBooks, LMN will set the QuickBooks Class based on the LMN Cost Code selected for the estimate/timesheet. Because each LMN Cost Code is matched to a QuickBooks Online Service Item and a QuickBooks Online Class, the LMN Cost Code sets both the Service Item and the class in QuickBooks Online.*
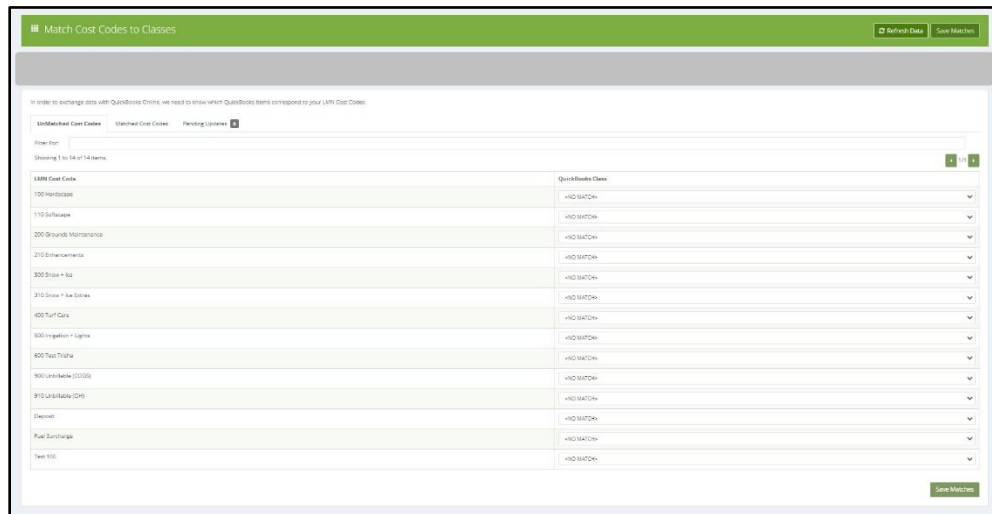
5. When you match an LMN Cost Code to a QuickBooks Class it disappears from the Unmatched Classes tab and is moved to the Pending Updates tab.
6. When you're finished all your class matching, you can review your matches by clicking the Pending Updates tab. If you have made changes, there will be a green numbered box beside this tab indicating how many changes are pending.
7. Click **Save Matches** to save your matching settings.

![lmn logo]

## STEP 4: Matching LMN Customers + Jobs to QuickBooks Customers

If you're not new to QB Online, there's a good chance you have customers in LMN that already exist in QuickBooks, therefore you don't want to create new ones (duplicates) when you export time records. You want to be able to export time records to customers that already exist in your QBO customer list.

1. Choose the **Setup** menu option (on the left side of the LMN/QBO Sync App)
2. Choose the **Link Customers** menu option.
3. Next, we'll load all your existing LMN Time jobs (that don't already have a match) on the left side of the screen.
4. Move to the first customer in the list.

If this customer <u>does not</u> exist in QuickBooks Online

1. Leave the **Match to Existing QuickBooks Customer** column set to: **No Match**
2. Use the **Action** column to choose your desired action. You can either:
   a. Create a new customer.
   b. Create a new customer and sub-customer (*this will create a customer record, then another "sub-customer" under the customer - it's useful for customers who have multiple jobsites that you want to track invoices and costs separately. Think of the customer as the billing address and the sub-customer as the jobsite address*)
   c. Create a new sub-customer for an existing customer (*this will create a new sub customer under a customer that already exists in your QuickBooks*)

3. Click the **Create** button to create the customer or sub customer immediately in QBO
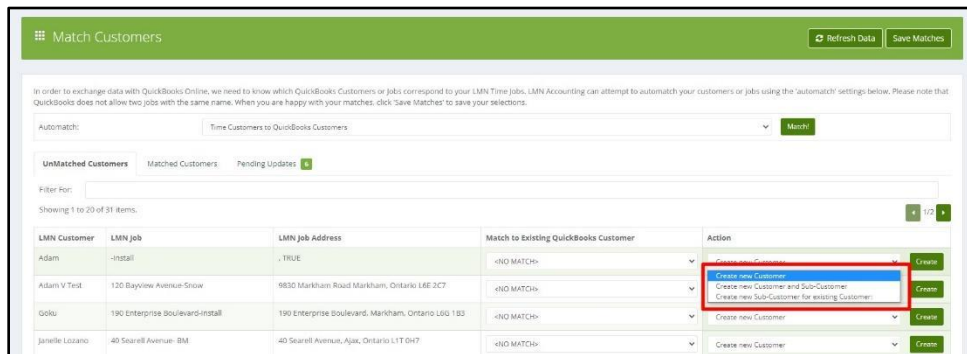

If the customer already exists in QuickBooks Online:

1. Use the **Match to Existing QuickBooks Customer** column to select the QuickBooks Online Customer or sub customer that matches the LMN job/customer.
2. The LMN customer/job will then disappear from the **Unmatched** list and appear the **Pending Updates** list (*see the tabs at the top of the list – you can quickly flip between lists by clicking the tabs*).
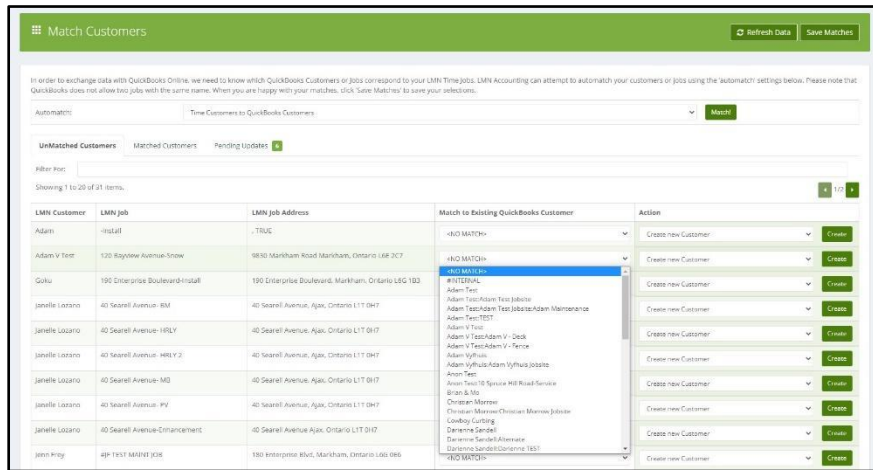
3. When you're finished matching, you need to click the **Save Matches** button at the bottom of the screen to save your matches.
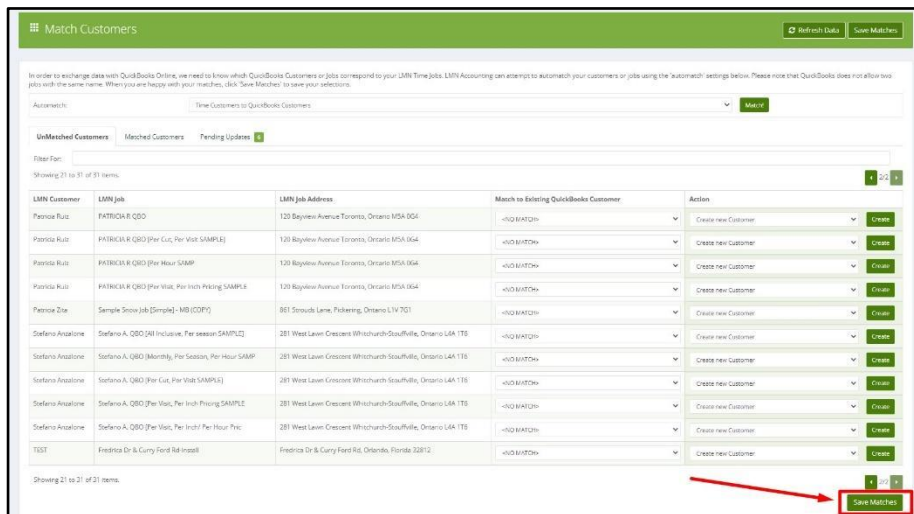

STEP 5: Linking LMN Time Staff to QBO Staff / Employees

To export Timesheets, you need to match your LMN Staff with your QuickBooks Online Employees.

1. Choose the **Setup** menu option (left side of the LMN/QuickBooks Online Sync App)
2. Choose the **Link Staff** menu option.
3. Next, we'll load all your existing LMN staff on the left side and all your existing QuickBooks staff on the right side.
4. Start at the top of the list and for each LMN employee on the left, choose the corresponding QuickBooks Online employee on the right side.
5. If the LMN employee doesn't exist in QuickBooks Online, you can click the **Create in QuickBooks** button to create the employee directly.
   - *IMPORTANT NOTE: LMN can only setup the employee basics. You will have to go into QuickBooks Online and setup payroll, tax, and wage information before you can create paychecks for these employees.*

6. You must click **Save Settings** to save all of your matches.
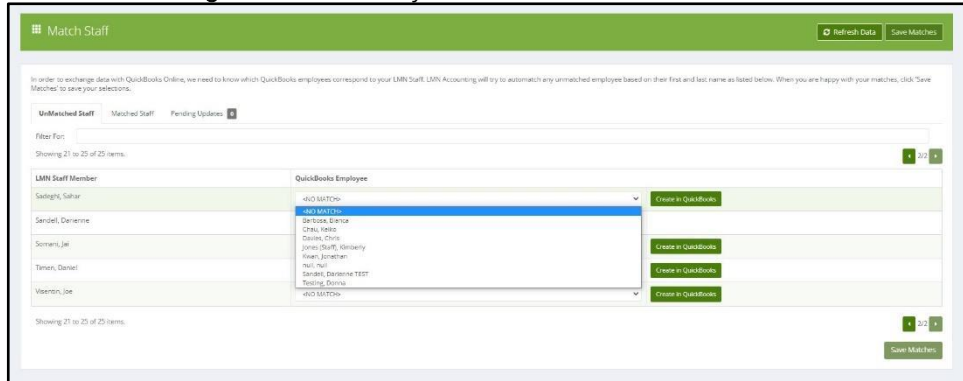
STEP 6: Linking LMN Taxes with QuickBooks Online Taxes

To charge sales tax properly on estimates/invoices, you need to link your LMN Tax Codes with QuickBooks Taxes.

If your company doesn't charge sales taxes on invoices

You can turn the settings to export taxes off, and then you don't have to worry about matching at all. Simply follow these steps:

1. In the LMN/QuickBooks Online Sync App, under the **Estimates** menu.
2. Choose the **Settings** option.
3. Under the Tax Settings section, choose the option that says **My Company does not charge Sales Tax (Taxes Off)**
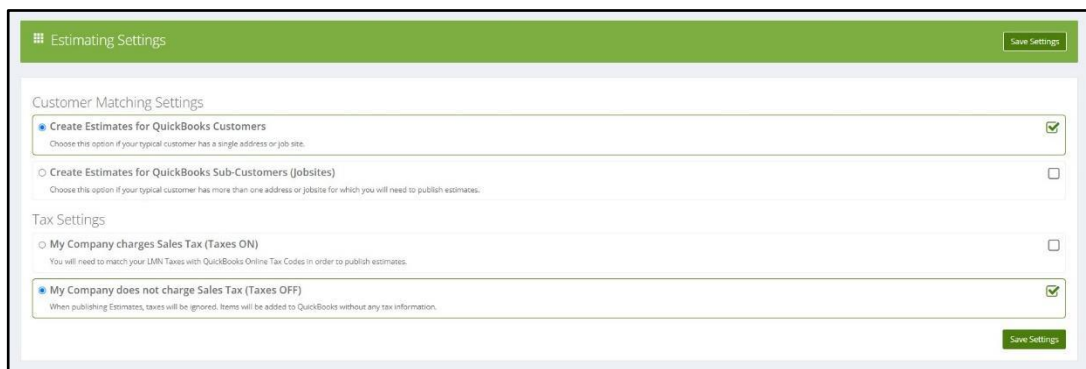
If your company charges sales taxes on customer invoices

First, ensure your settings are configured to charge taxes. Follow these steps:

1. In the LMN/QuickBooks Online Sync App, under the **Estimates** menu:
2. Choose the **Settings** option.
3. Under the Tax Settings section, choose the option that says **My Company charge Sales Tax (Taxes On)**
4. Choose the **Setup** menu.
5. Choose **Link Tax Codes**

6. For each LMN Tax Code on the left, select the matching QuickBooks Tax Code on the right.
7. Click **Save Matches** when complete.
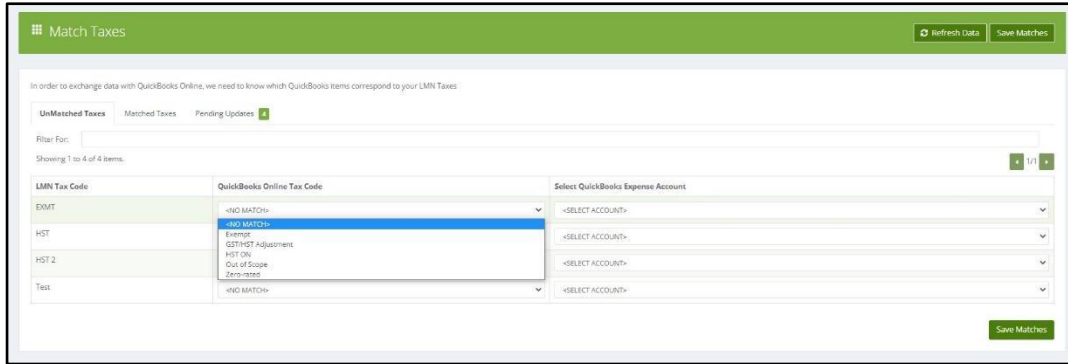
## STEP 7: Exporting Estimates to QBO - Configuring Your Settings

There are two areas in LMN where you should configure some settings before exporting your first estimate to QuickBooks Online

Estimate Export Settings in LMN

The first settings are simply to make it easier to add estimates to the export queue, and setup some default statuses (if you wish) after they are successfully exported.

1. In the LMN **Settings** menu, click **QuickBooks** under the **Integrations** settings.
   1. **Default Status View**: LMN has an Export Queue where you can queue 1 (or more) estimates for export. To show all estimates by default, leave this setting at **All Statuses**
   2. To filter estimates with a particular status (e.g. Sold) as your default, set these dropdowns to the specific estimate status you wish to use.
2. **Estimate Status Update**: After a successful export to QuickBooks, LMN can automatically update an estimate's status (e.g. "Exported to QB" for example).
   1. To update an estimate's status after a successful export, choose the estimate status that you wish to use after the export.
3. **Default Export Format**: You can export estimates in 1 of 2 ways:
   1. **Summary** *(most common)*: exports the names of each work area/service, along with the total price, but does not export every line item (all the labor, equipment, materials, etc.) to QuickBooks.
   2. **Detailed (Print details)**: exports every line item of an estimate to QuickBooks, including all labor, equipment, materials and more. *(Most contractors don't show clients this level of detail and there fore wouldn't export this amount of detail to QuickBooks)*
   3. **Detailed (Hide details)**: exports every line item of an estimate to QuickBooks so you can see all the details on screen but doesn't print all the details when you print a customer invoice. *(Most contractors don't need an invoice line item for every single item in a proposal; it makes progress invoicing far slower, as you must set a completion percentage for every single line item)*
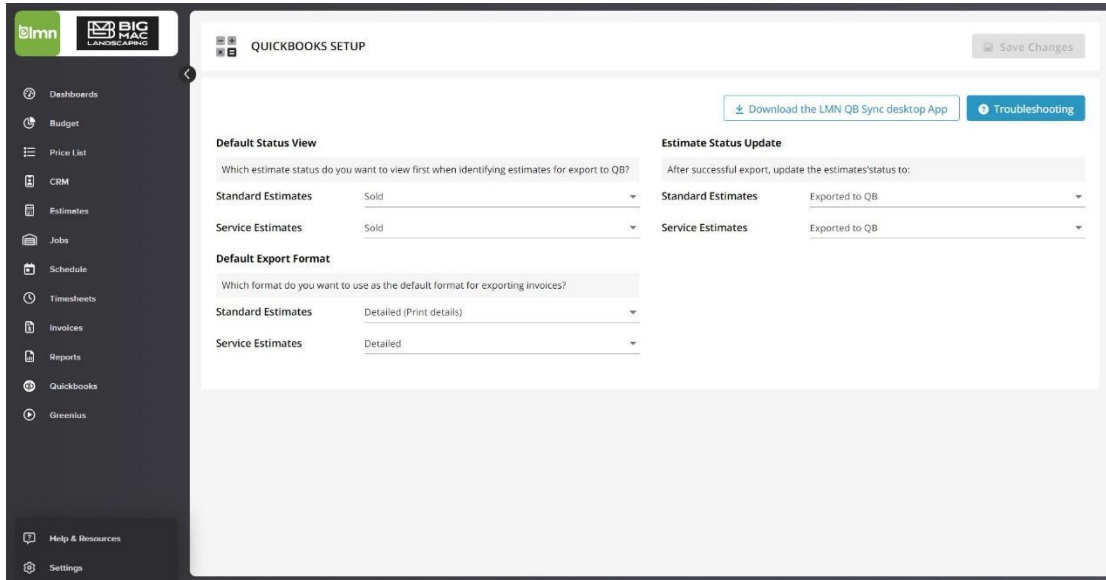
Estimate Export Settings in the QB Online Sync App

There are only two simple settings you need to configure in the QuickBooks Online Sync App

1. Login to the QuickBooks Online sync tool at *https://accounting.golmn.com*
2. Using the left-hand menu, under **Estimates**, select **Settings**
3. The first setting is your **Customer Matching Settings.**
    1. If you use sub customers in QuickBooks Online for customers who have multiple jobsites, then turn the **Create Estimates for QuickBooks Sub-Customers (Jobsites)** to on.
    2. If you use sub-customers in QuickBooks Online, then set this setting to **Create Estimates for QuickBooks Sub-Customers (Jobsites)**

4. The second setting will configure how you handle sales taxes. Refer to Step 6 "**Linking LMN Taxes with QuickBooks Online Taxes"**

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

![lmn logo]
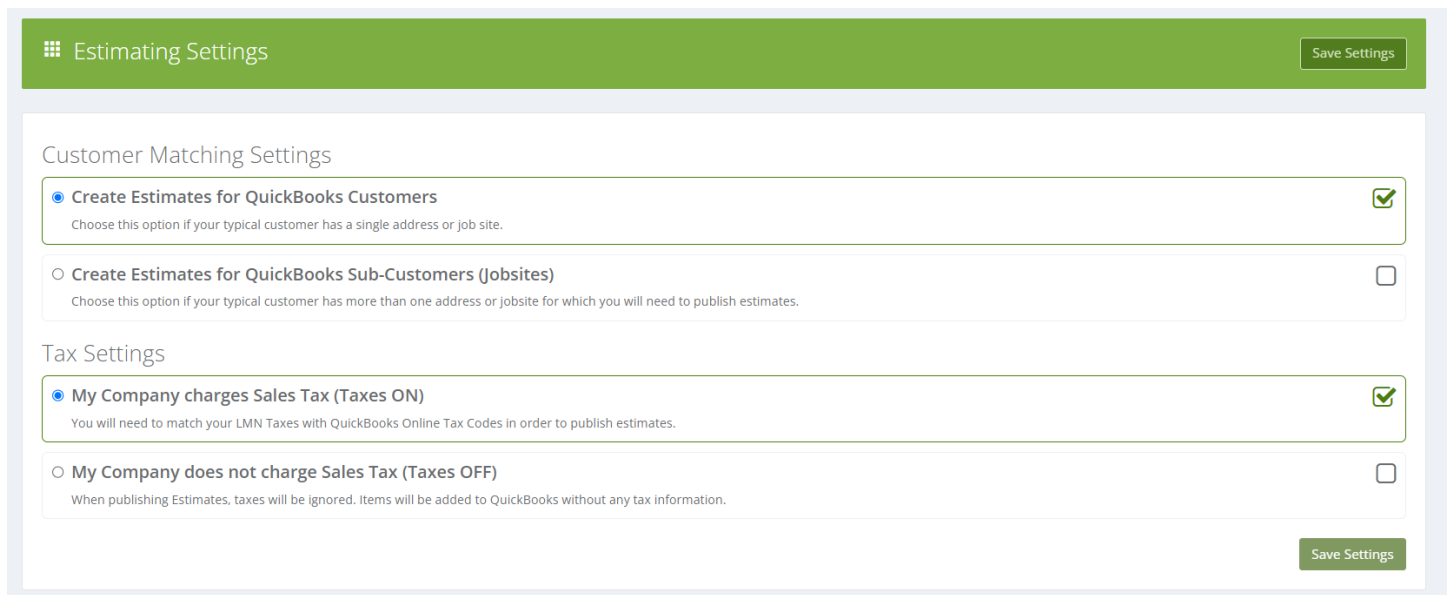
STEP 8: Exporting (Publishing) LMN Estimates to QuickBooks Online

LMN can take the manual work out of entering customer and estimate information into accounting by exporting your customer, address, and estimate information into QBO directly. Here's the guide on how to do it.

First: Establishing Your Settings

Before you get right to exporting estimates, make sure you've followed all these setup steps, one at a time to configure your connection and settings between LMN and QBO.

You may have already completed these steps, but in case you jumped to this help article first... go back and follow the steps in the link below before you try your first export.

[QuickBooks Online: A Guide](#)

Next: Queue Estimates for Export

Estimates get exported in two steps:
1. **Add estimates that need to be exported to the export queue** *(This is to indicate the estimate has been sold (typically) and is ready for export to QuickBooks Online. This can be done by anyone with permission to LMN estimating)*
2. **Publishing estimates in the queue to QuickBooks** *(This step can only be done by users who have LMN Accounting permissions set to Full Access)*

This section will show you how to add estimates to the export queue.

How to add estimates to the QB queue (one at a time):

Estimates can be added to the export queue in each of the individual estimates, or can be selected from the **Estimate List**, the **Standard** estimate list, or from the **Service** estimate list. To add a single estimate to the queue, simply open the estimate you wish to add. At the bottom of the estimate screen, click the **Mark for QB Export** button to add the estimate to the export queue.

![lmn logo]
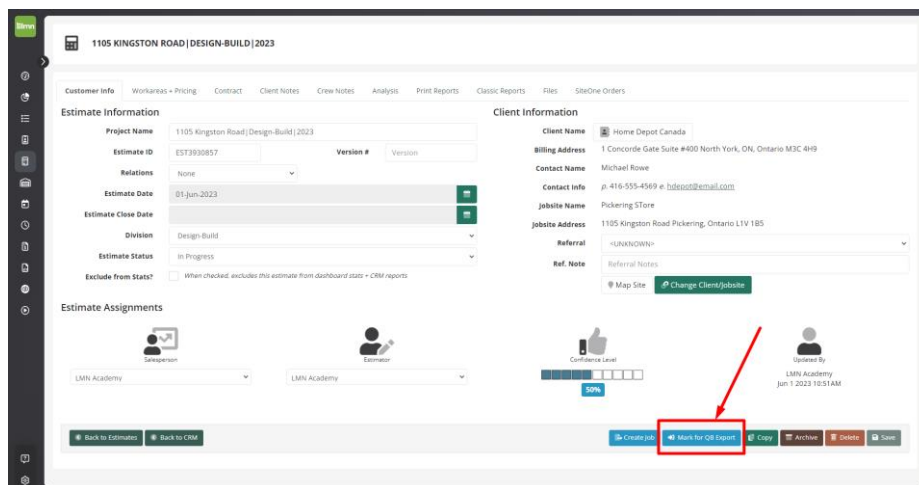
How to add estimates to the QB queue (more than one at a time):

You can add multiple estimates to the queue without opening them one at a time.

1. In LMN, click the **QuickBooks** menu to expand it.
2. Choose the **Export** option.
3. The screen will then load a list of your estimates. You can use this screen to filter estimates by status, by type, by date, and whether they were previously exported or not, or you can search for a specific estimate.
    a. *If you're re-exporting an estimate, you've previously exported, make sure to set the **Previously Exported** option to **Yes**.*
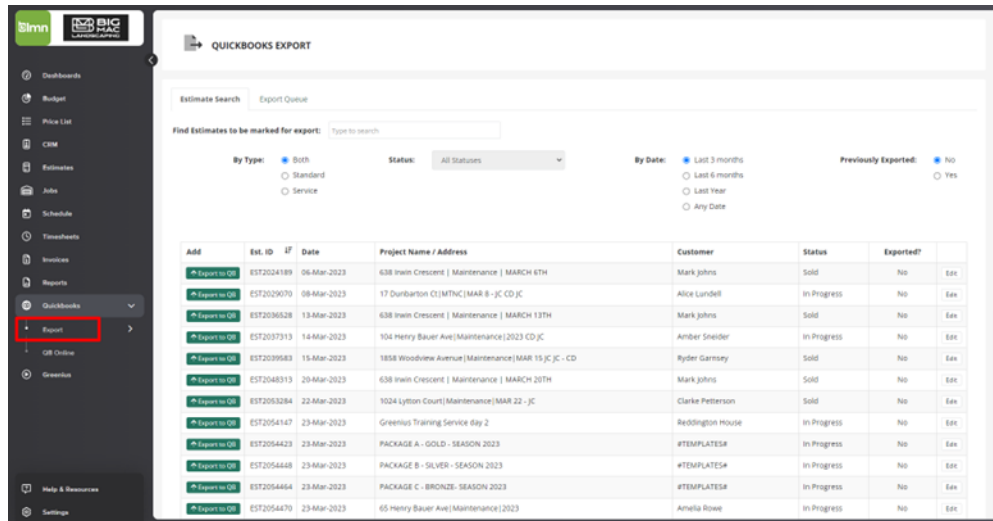
4. Click the **Export to QB** button beside any estimate(s) you wish to add to the export queue
5. The button will change color and say **Queued** to let you know it's ready to be published to QuickBooks.
6. Click the **Export Queue** tab at the top of the screen if you want to review the entire list of estimates in the queue to be exported.

Next: Publish Your Estimates to QuickBooks Online

To actually export estimates from the queue to QBO, you'll have to login to our QBO/LMN Sync app.

You can access this app in 1 of two ways:

1. Open **QuickBooks** from the main LMN menu and click the *"QB Online"* option.
2. Bookmark *https://accounting.golmn.com* - *note that the 's' at the end of https:// is critical - your login will not work without that 's'. The 's' helps to ensure a secure connection.*

You'll first be prompted with a login screen where you need to enter your username and password. The login credentials would be the same as your LMN account login. Only users with **LMN Accounting** permissions set to **Full Access** can login to the QBO/LMN Sync app.

After logging in, choose **Estimates | Publish Estimates** on the left-hand menu.

The estimates that are in the export queue will show up on this screen. If no estimates show up, you don't have any in your queue. *Note the two tabs at the top of the screen* **Standard** *estimates show in one list and* **Service** *estimates show in another.*
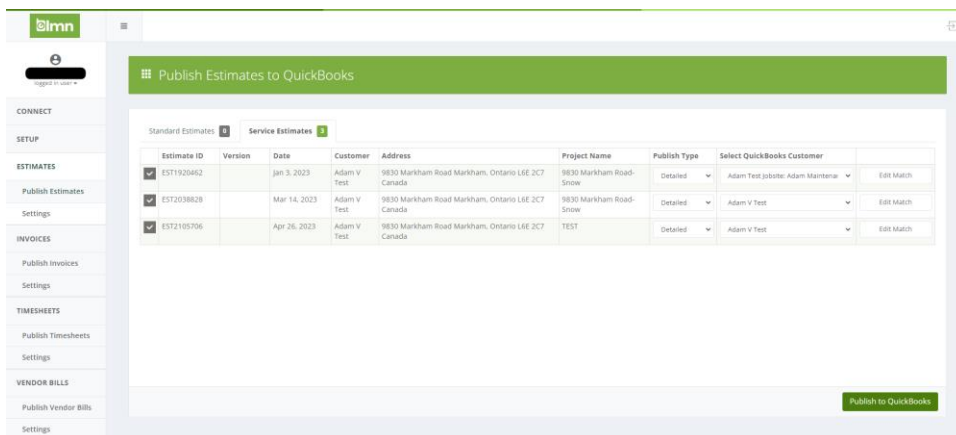
Step One: Select the Publish Type

You can choose either a **Summary** or a **Detailed** type:

- **Summary Type Export (***most common***)**: Will export 1 line item for each work area or service in the estimate.
- **Detail Type Export**: Will export a line item for every single item on the estimate. This option is not used often since most contractors don't show clients every detail behind the estimate.

Step Two: Select the QB Customer

There are a few different scenarios you will encounter when exporting an estimate to QuickBooks Online. Here's an explanation of each situation and how to handle it:

New Customers (customer does not exist in QB): Leave the setting at **New Customer**. When exporting this estimate, LMN will create a new customer in QBO using the customer info in the estimate.

Publish Type	Select QuickBooks Customer	
Summary ⌄	New Customer ⌄	Look for Match

New Customer: New Sub Customer (customer does not exist in QB): Sometimes you want to create a job (or *sub customer*) under a customer for better tracking of customers who have multiple jobsites. If you change the setting to **New Customer; New Sub customer**, LMN will create a new customer using the estimate's customer/CRM information as the Billing Address and a sub customer under that customer with the jobsite's address as the **Shipping Address**.

Publish Type	Select QuickBooks Customer	
Summary ⌄	New Customer: New Sub-Customer ⌄	Look for Match

Match to Existing Customer: Sometimes the estimate's customer already exists in QuickBooks, but the name is spelled differently. In this case, use the "*Look for Match*" button and select the QBO customer. LMN will export a new estimate under the selected customer's file.

Results (53)	
Christian Morrow	Select Match
→ Christian Morrow Jobsite	Select Match
Cowboy Curbing	Select Match
Darienne Sandell	Select Match
→ Alternate	Select Match
→ Darienne TEST	Select Match
Darienne Test	Select Match
Darienne TEST2	Select Match
→ 42 Pleasant View Crescent-Maintenance	Select Match
→ 6 Kingston Road-Maintenance	Select Match

Match to Existing Customer; Sub customer: If the customer already exists in QuickBooks and the Jobsite already exists as a sub-customer, you can export the estimate information to a QuickBooks Online Sub Customer by clicking the "*Look for Match*" button and choosing the sub-customer (one of the indented rows) in QBO for whom you want to export the estimate.

Match To Existing Customer; Create a New Sub customer: Finally, there's the situation where the customer already exists in QuickBooks, but the jobsite (sub-customer) is new. You can easily create a new jobsite (sub-customer) for any existing customer by clicking the "*Look for Match*" button and selecting the customer for whom you want to export the estimate. After you've selected the customer, click the **Select QB Customer** dropdown and choose the **New Sub customer** option.

If you made a mistake in any of your matching settings, you always have the ability to click the **Edit Match** button and choose a new match, or clear your match to return to the new customer options.
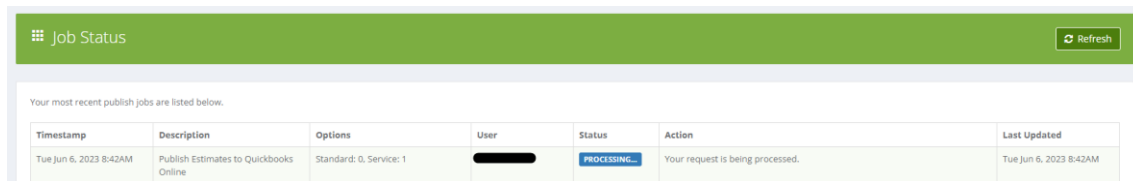
Publishing Your Estimates to QuickBooks Online:

 When you're finished with your new customer/matching settings, click the **Publish to QuickBooks** button in the bottom right. First, you'll get a confirmation message making sure you're ready to publish your estimates. If you're sure you're ready, click **YES**.

The Request Queue

After you click Publish, your estimates will be queued for export from LMN to your QuickBooks Online account. An export may wait in the queue from 30 seconds to 3 minutes, but rarely longer. To check on the status of your job, click the **Continue to Job Status** button.

![lmn logo]

Next, you'll be taken to a screen where you can see the time you submitted your request, a description, the number of estimates, and the current export status. You can click the **Refresh** button in the upper right corner to refresh your status at any time.

When the export is waiting it will show a status of **QUEUED**.

When the export is currently processing, it will show a status of **PROCESSING**.

Results and Troubleshooting

When the export is finished, it will show one of the following statuses:

- **Successful**: No errors were detected; your estimates have successfully exported to QBO
- **Partially Successful**: Some of your estimates went over fine, some had errors.
- **Error**: Your export operation encountered an error and none of your estimates were exported successfully.

A log will be emailed to you with details about your export. The log will contain IDs of the estimates exported and, if an error is thrown, a description of the error. The log will be emailed, automatically to the email address of the user account who ran the export.

Error logs send immediately, but depending on email servers, you may have to wait 0 to 5 minutes for the log to show up in your email. If you're not receiving a log, make sure the email attached to your LMN user account is the email you're checking!

Sometimes the cause (and solution) to the error is contained in the log file. If you've looked at the error log and still can't figure out how to fix the problem, don't worry, we're here to help. Simply forward the email, with the log, to *support@golmn.com* and we'll dig a little deeper to help you get past your problems.

STEP 9: Exporting Timesheets to QBO - Configuring Settings

Timesheet export settings are straightforward. You can export time to QuickBooks Timesheets in 1 of 3 methods for job tracking.
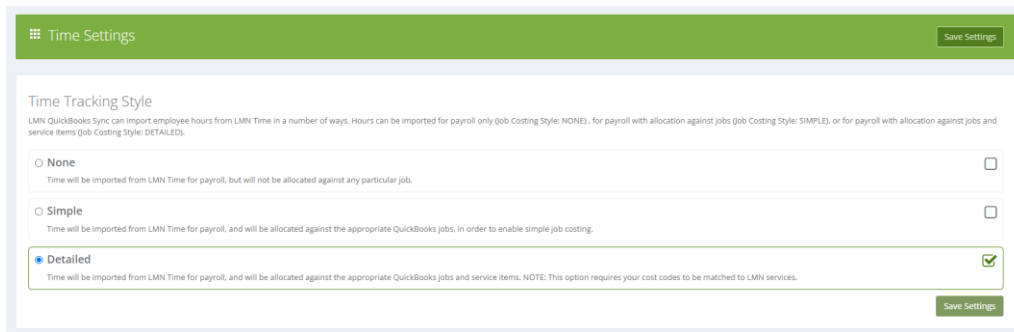
 To access your timesheet export settings, simply login to *https://accounting.golmn.com* then choose the **Timesheets | Settings** option on the menu.

- **None**: Time will be exported for timesheets and payroll, but time will not be allocated to any jobs or service items for tracking. This method simply tracks employee hours by day.
- **Simple**: Daily hours will be exported for each employee allocated to each job they worked on that particular day
- **Detailed**: This is the best method for job costing and tracking. Using this method, employee time is allocated both to a job and to a service item and, optionally a class, so you can pull reports on time by job, by department, or by class.

Note that at the time of this article, QuickBooks Online does not officially support job costing, but hopes to in the future. We recommend exporting with as much job costing information as possible. It doesn't add much extra work (jobs and service items are automatically set by LMN Time) and maybe as QuickBooks adds reports in the future, they will work retro-actively.

STEP 10: Exporting (Publishing) LMN Timesheets to QuickBooks Online

Before you Export...

Match Existing Jobs:

If you have jobs in LMN Time that already exist in QuickBooks Online and you haven't matched them yet, we recommend matching those jobs first to avoid any interruptions to the export process. And don't worry, once you match a job, we'll remember it for future exports. You'll only have to match each job once.

NOTE: new jobs can be created on-the-fly by LMN - you only need to match the jobs that:

a. exist in LMN and have never been matched to QuickBooks Online
b. already exist as customers in QuickBooks Online

For instructions on matching existing LMN Jobs with existing QuickBooks customers, click this *LINK*.

Match Existing Staff:

If you have new staff during this time period, make sure they're setup in QuickBooks Online first. Remember, LMN Time doesn't have wage or payroll tax information so it can't setup staff in QBO properly for you.

![lmn logo]

For instructions on matching existing LMN Staff with existing QuickBooks staff, click this *LINK*.

Review + Approve All Timesheets

Make sure any/all timesheets from the pay period have been approved. *If a timesheet has not been approved, it will not be included in the export.*

Note: *skipping timesheets can* effect *overtime calculations. It's best practice to approve all timesheets for the period before you run the export.*

Exporting Timesheets to QuickBooks Online

Once you've got your jobs + staff are matched and your timesheets approved, you're ready to export. To start the process, login to the LMN QuickBooks Online accounting sync app at: *https://accounting.golmn.com*.
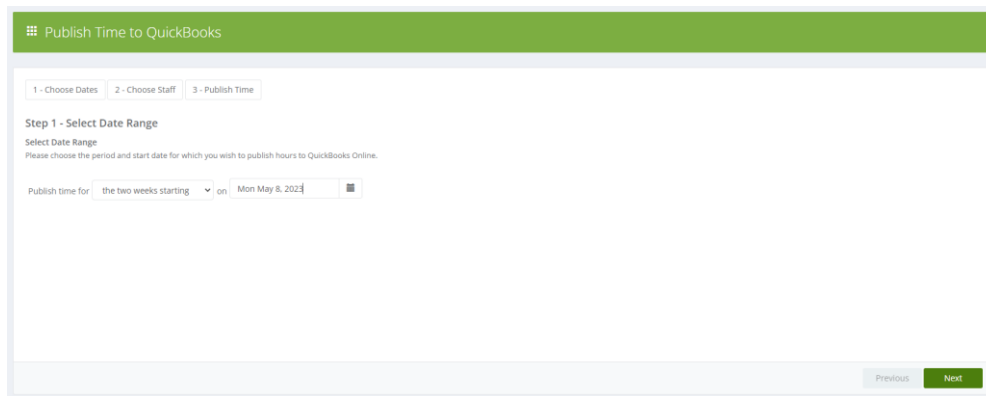
Once logged in, use the left menu and select Timesheets | Publish Timesheets menu option.

STEP ONE: Set the Date Range

Unlike estimates, you don't need to add timesheets to a "queue" to export them. Timesheet exports are driven by a start date, then you can export either 1 week, 2 weeks, 3 weeks or 4 weeks of timesheets.

Hint: *You must publish at least 1 entire week of timesheets for payroll and overtime calculations. You cannot export timesheets on a day-by-day basis. Overtime rules cannot be calculated until the full week of work is known.*

From the **Choose Dates** step, choose the amount of time (1 week, 2 weeks, etc.) you wish to export and the starting date.

STEP TWO: Choose Staff

Once you've chosen the dates, LMN's sync tool will scan all the timesheets for that period and display only the staff who have eligible time during that period.

By default, LMN will try to export all selected staff's time. Optionally, you can un-check any staff member whose time you do **not** wish to export.

![LMN logo]

Hint: if a staff member shows up in red, that indicates that staff member has not been matched to your QBO Employees. You need to add this employee to QBO or match this staff member before continuing.
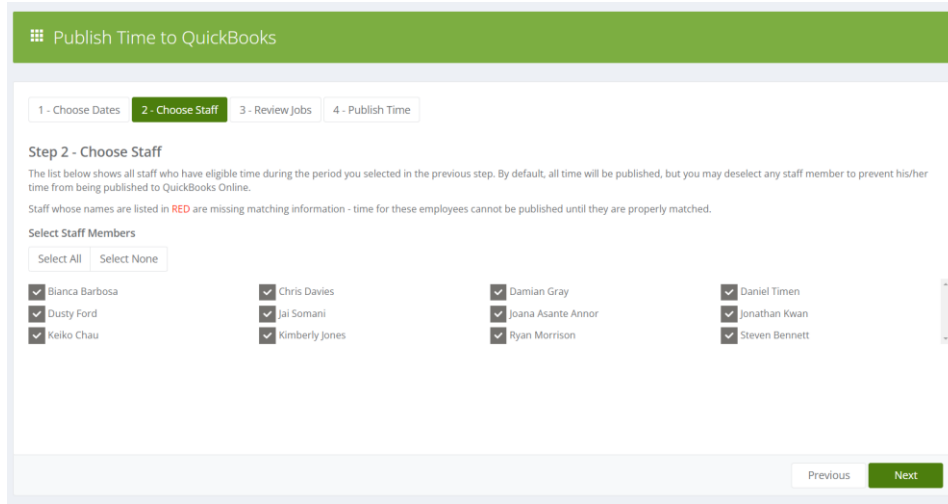
STEP THREE: Review Jobs

Next, LMN's sync tool will scan all timesheets for jobs that have never been matched to QuickBooks Online customers or sub-customers. If LMN finds jobs on timesheets that exist in LMN Time, but not in QuickBooks, it will grant you access to a screen where you can create them instantly.

You have two options when a job exists on timesheets but is not matched to a QBO customer or subcustomer:

1. The Job is new and doesn't exist as a customer in Quickbooks Online:

In this scenario, simply click the **Create In QuickBooks** button and LMN will instantly create a customer in QuickBooks Online for you (*note: customer names must be unique… if you get an error trying to create a customer using this method, it's very likely that a customer or vendor or employee already exists in QuickBooks online with that name*)
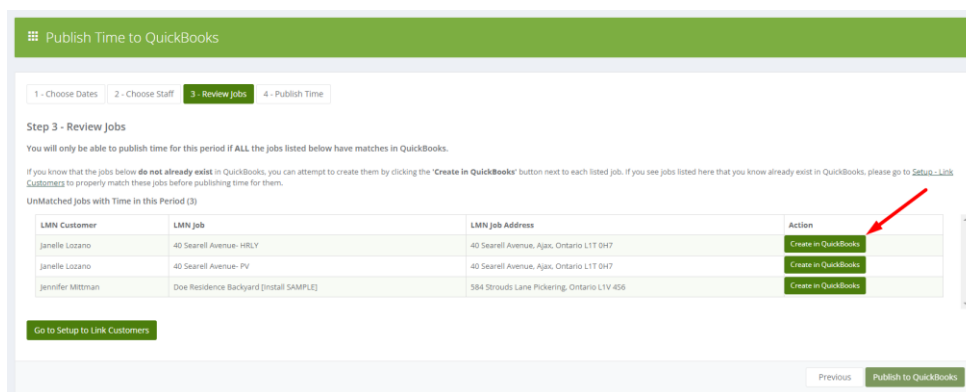
2. The Customer already exists in QuickBooks Online, but has never been matched to the LMN Time Job:

In this scenario, you'll need to go back a step and using the matching wizard to match the LMN Time job to its corresponding QuickBooks online customer or sub-customer. To jump to the matching screen, click the **Go to Setup to Link Customers** button in the bottom right.
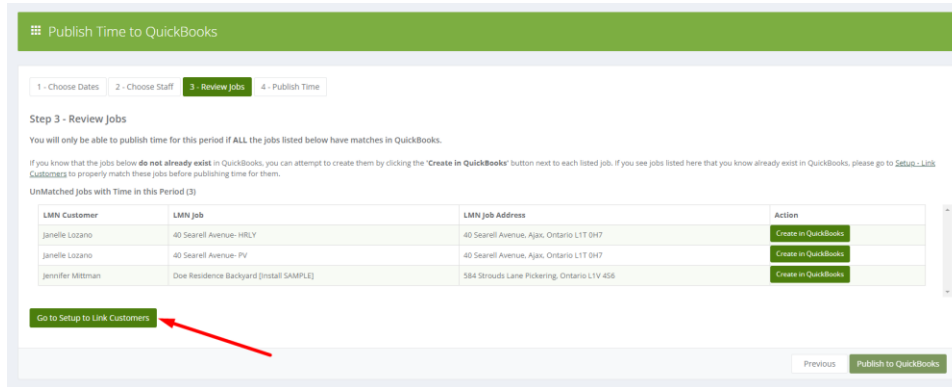
When all jobs on timesheets have a corresponding match in QuickBooks Online, you should see the screen below and you're ready to export.
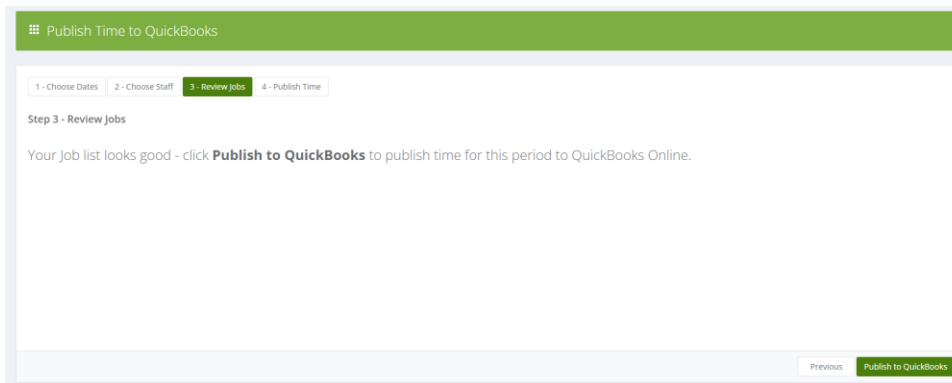
STEP FOUR: Publish/Export Timesheets to QuickBooks Online

Next, click the **Publish to QuickBooks** button to start the export process. Just like estimates, your timesheet export job will be added to the export queue.
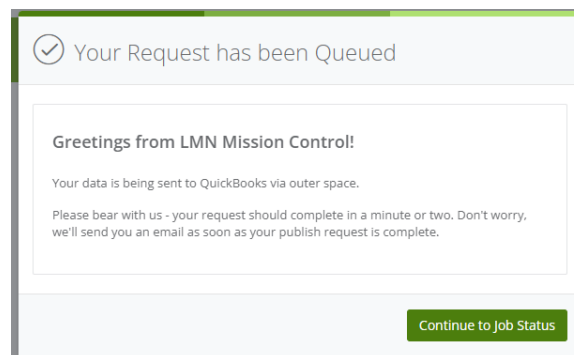
Depending on connection speed and some other factors, your job may take 10 seconds or up to 5 min to complete. The average time is around 30-60 seconds. To view the status of your job, click the **Continue to Job Status** screen.

On the Job Status screen, you'll be shown the export you started and some information about its progress. You can click the **Refresh** button in the upper right corner to update the current export status.

- **Queued**: means the export is waiting to start
- **Processing**: means the export is currently working and will be done in just a few seconds
- **Successful**: means your export was successful. You can login to QuickBooks Online and view your employee timesheets and complete payroll.
- **Error**: means the export wasn't successful and none of your timesheets will get exported. Most users get an error or two when they are first setting up the export - and the errors are usually because there's some missing 'matching' information between LMN and QuickBooks Online.


If you get an error... LMN will automatically email an error log to the user's email who ran the export. This log will give you details of why the error occurred. Sometimes the log contains enough information for you to spot the error and correct the problem. Other times, QuickBooks makes it a little harder to decipher the error. In this situation, you can easily forward the email and the attached error log to *support@golmn.com* and we'll do our best to get you fixed ASAP.

STEP 11: Exporting (Publishing) LMN Vendor Bills to QuickBooks Online

Before you Export...

Match Existing Vendors:

- In the Setup submenu, click on 'Link Vendors.' The page that opens will default to an 'UnMatched Vendors' tab that shows a list of vendors from your LMN CRM, that have *not* yet been linked to a vendor within your QuickBooks instance.
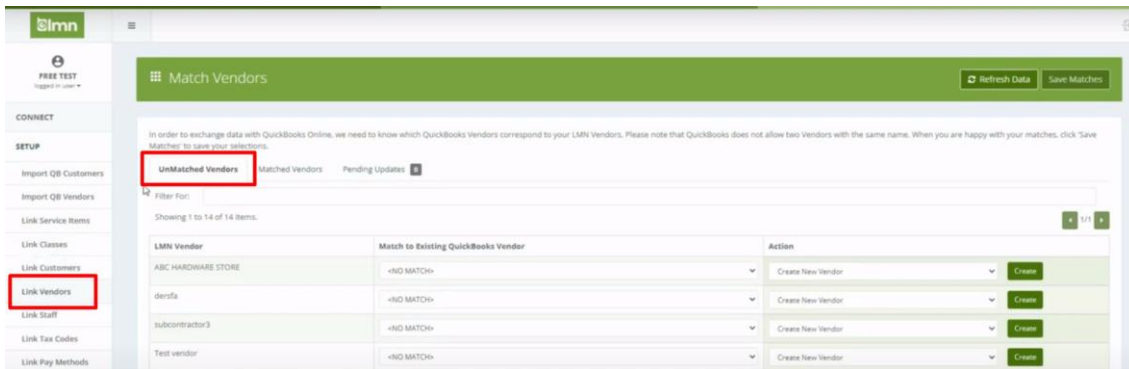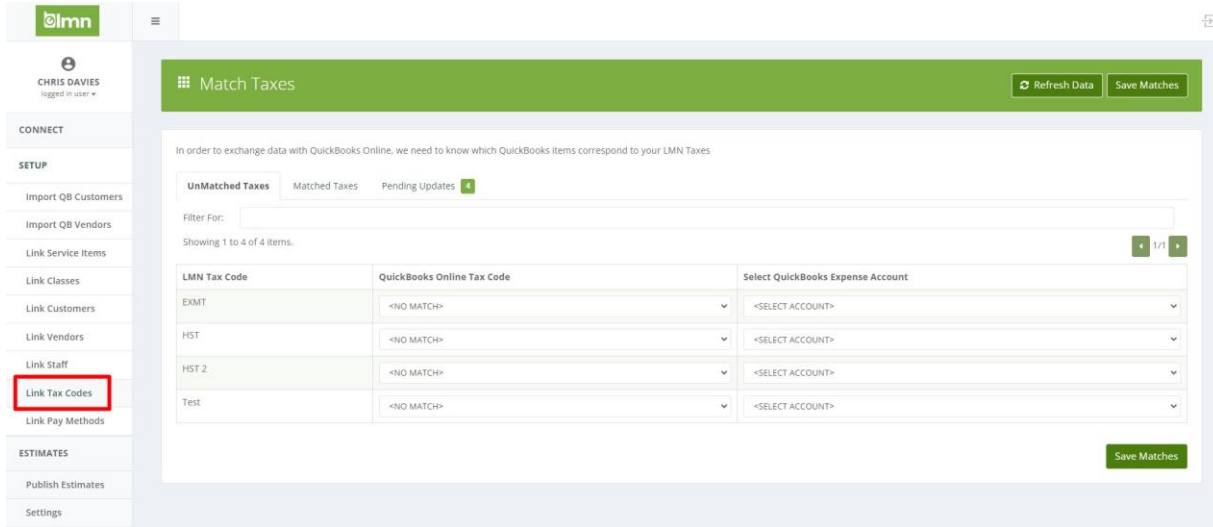

- Use the dropdowns in the 'Match to Existing QuickBooks Vendor' to select the appropriate QuickBooks-side vendor if it exists. If it does not, you can leave the dropdown set to '<NO MATCH>' and the 'Action' column to 'Create New Vendor,' then click on the green '**Create**' button to create a new QuickBooks vendor, which will be matched to the LMN vendor in that row.
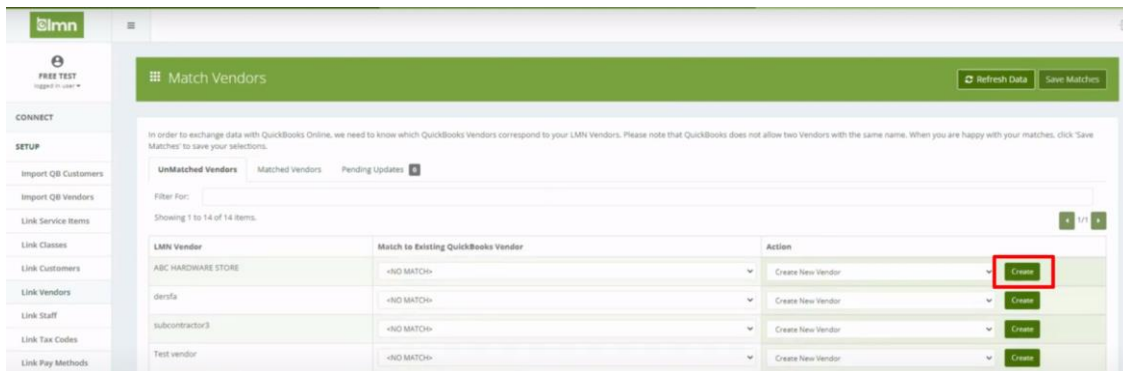
Matching Tax Codes:

Matching your LMN Tax Codes to the QuickBooks Tax Items for your Expense Accounts is an important step before exporting Vendor Bills, because the Expense Account you are allocating a purchased material (for example) to, will often be different from the Expense Account which will apply to the *tax* you paid on that purchase.

- In the **Setup** submenu, click on '**Link Tax Codes**.' The page that opens will default to an 'UnMatched taxes' tab that shows a list your LMN Tax Codes, that have *not* yet been linked to a Codes within your QuickBooks instance. Matching to a QuickBooks tax code works similarly to matching Vendors as described above.

- When creating new matches or reviewing existing ones, use the dropdowns in the 'Select QuickBooks Expense Account' to make sure that the appropriate Account is applied to each Tax Code. If you are making updates to existing matches via the 'Matched Taxes' tab, make sure you click the 'Save Matches' button when done.
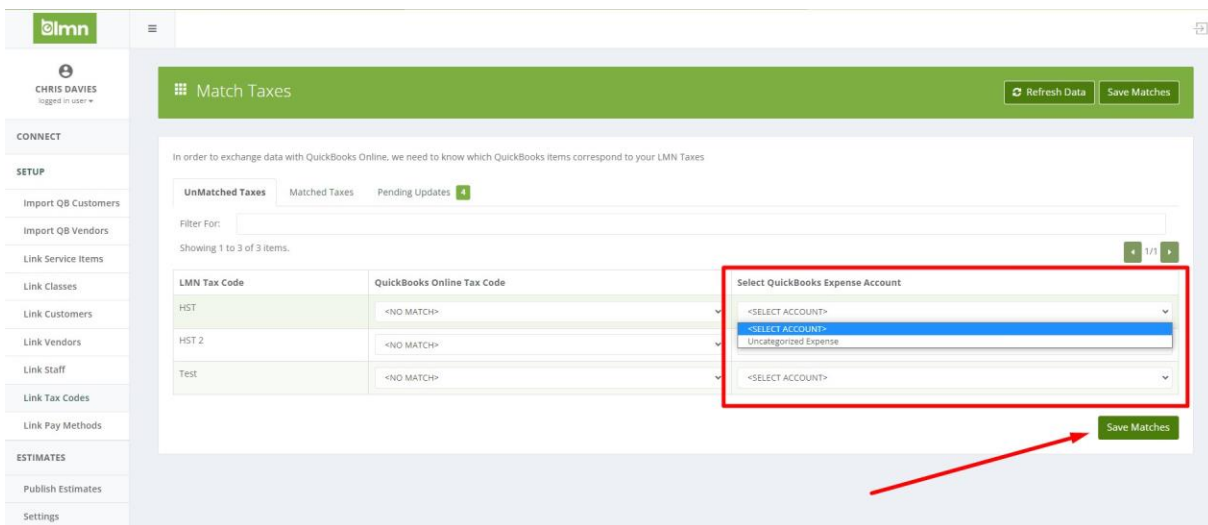
Vendor Bills Settings:

Next, it is time to review the settings that will apply to your Vendor Bill exports. Within LMN Accounting's Vendor Bills submenu, click on the '**Settings**' link. Here you will see two selectors:

- On this screen you can also set whether or not you want tax information to come along with your Vendor Bills as they are exported from LMN to QuickBooks.
  - Check '**My Company Calculates Taxes in Vendor Bills**' if you want tax information to be brought over with each bill. (NOTE: you will need to have properly matched your tax codes [see above] if you want the exports to work correctly with this setting enabled.)
  - Check '**My Company does Not Calculate Taxes in Vendor Bills**' if you do *not* want tax information to come over into QuickBooks along with your exported vendor bills.
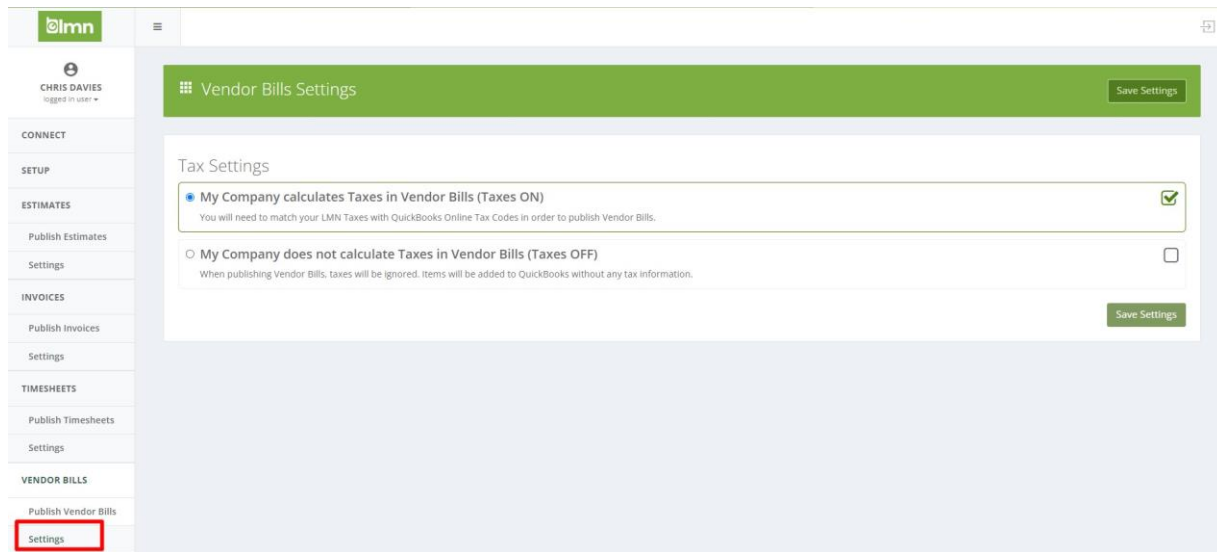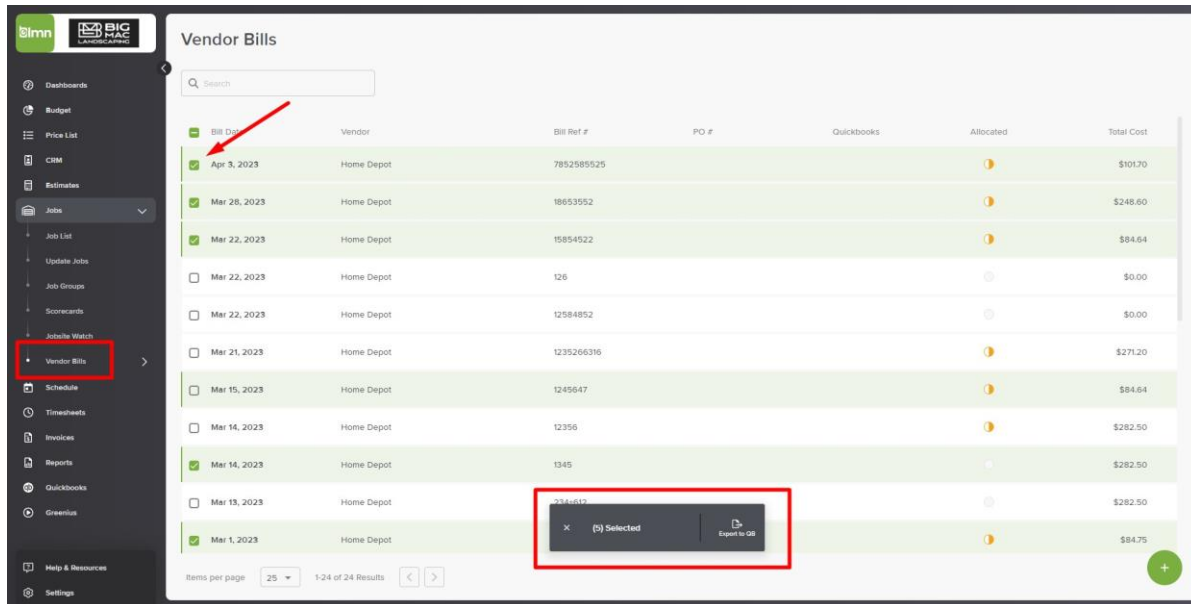

Queuing LMN Vendor Bills for QuickBooks Online export:

Before you can export Vendor Bills to QuickBooks, you will need to queue them for exporting within LMN. There are two ways to do this:

- From within the Edit page of a Vendor Bill itself, there is a '**Queue**' button at the top left. (Note: your LMN account will need to have a connected QuickBooks account in order for this button to appear.)
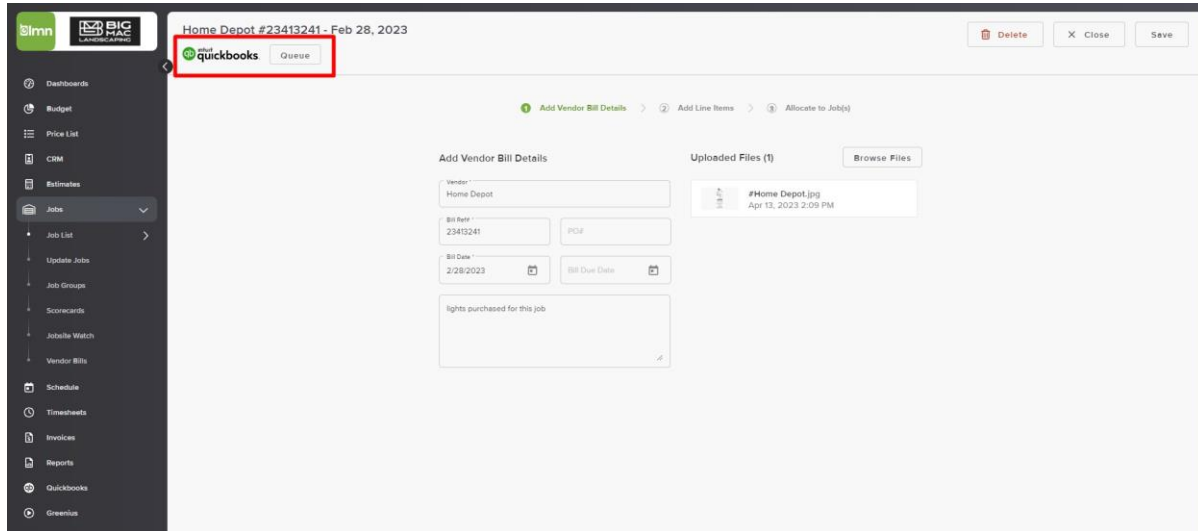
- When looking at a Vendor Bills list -- either the main list accessed under Jobs within the LMN navigation menu, or a list within a job -- you'll now have the ability to checkmark one or more Bills. After you have done so, a prompt will appear with an 'Export to QB' button. When this is clicked, the selected Bills will become **queued**.


Reviewing Queued Vendor Bills in *LMN Accounting* (QuickBooks Online)

To review your queued Vendor Bills before completing the export operation, head into LMN Accounting and select 'Vendor Bills' from the main navigation menu. This will take you to the *Vendor Bills* screen.
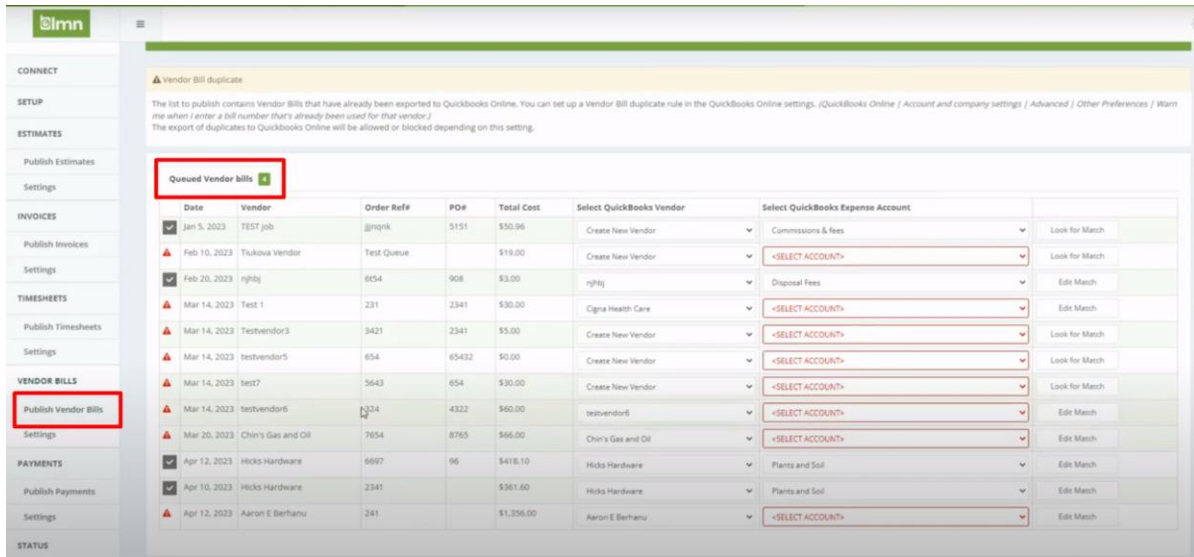
If the Vendor associated with your Vendor Bill in LMN text-matches any Vendors already existing in your QuickBooks account, LMN Accounting will suggest the match automatically. To revise a suggested Vendor match, just click on the '**Edit Match**' button and you will be able to choose from the list of your existing vendors in QuickBooks.
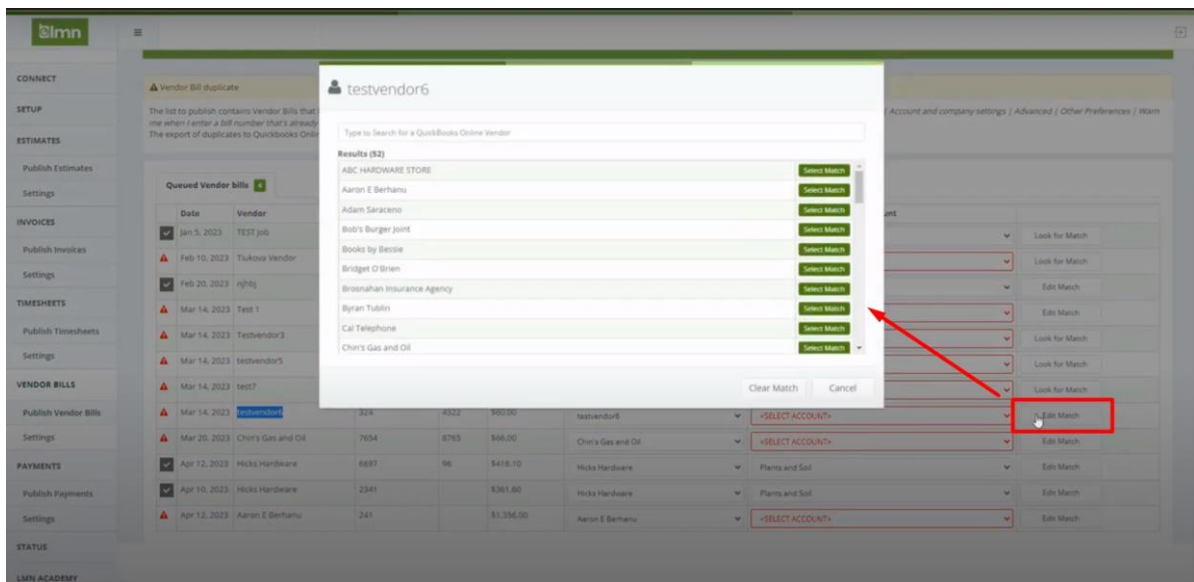
If no match was detected by LMN Accounting, this Bill's Vendor dropdown will default to '**Create New Vendor**.' From here, there are two ways to connect a QuickBooks Vendor to the bill:

- Use '**Edit Match**' to manually match the Bill to a QuickBooks Vendor from your account; or,
- Proceed to Publish the queued Vendor Bill with 'Create New Vendor' selected. If you do so, LMN Accounting will create a new Vendor within your QuickBooks account, using the text from your LMN Vendor Bill's 'Vendor' field.

Publish your Vendor Bills to QuickBooks Online

To complete the export, click the '**Publish**' button. After you've done so, you can use the **Job Status** screen to confirm that your Vendor Bill exports were successful. If they were, you'll be able to now see those Vendor Bills within your QuickBooks Online account.