Exporting Classes in Invoices

Quickbooks Online · https://mountainstream.co/docs/exporting-classes-in-invoices-to-quickbooks/

- You can assign classes to exported invoices by opening QBO dashboard page in Streamline and select how do you want to assign classes to invoices:

[Screenshot of QuickBooks Online Integration Settings page displaying export options and class assignments, with the Assign classes dropdown highlighted, offering choices: OFF, One to entire transaction, or One to each row in transaction.]

- As in QBO, you have 3 options: OFF, one class for the entire transaction, or one class for each row in a transaction.
- After you select how you want to assign classes, you have to select which class you want to attach to exported invoices by going to the customer settings page for a specific customer and select the class from your QBO.
- Now any invoice for that customer will have this class assigned to it.

[A screenshot of QuickBooks Online Integration settings showing options for exported invoices, with checkboxes for Allow ACH payments, Allow credit card payments, and a dropdown menu labeled Attach class.]

Get Started