QuickBooks

Quickbooks Online · https://mountainstream.co/docs/quickbooks/

Connecting with QBO

1. On the main menu, select **Finance › Settings**.

2. Scroll down to “Accounting” section or select it from the navigation on the top left of the page.

3. Make sure that you have “QuickBooks Online” selected as your Account software.
(*If not, select it and press “Save” at the top of the page*).

4. Press “Setup your account software settings” button.

[Finance settings page displaying steps to select QuickBooks as your accounting software, with a QuickBooks Dashboard button next to the Intuit QuickBooks logo. Numbered navigation steps are shown on the left.]

This will redirect you to QBO where you will need to sign in, select your company in QBO (*if you have more than one*) and allow Streamline to access your data.

1. First, select your company.

2. And then allow access to your QBO data.

If Streamline successfully connects to your QBO, you will be redirected to the page where you will have to fill out some additional data so that Streamline can correctly import and export data to QBO.

[A QuickBooks authorization screen prompts the user to connect with StreamlineQBO, displaying a list of QuickBooks sandbox companies on the left and a highlighted “Connect” button on the right marked by a red arrow.]

Setting up connection between QBO and Streamline

Log in, go to **Finance › QuickBooks Dashboard** and connect.

After you have successfully connected to your QBO by following steps above, you will be redirected to a page where you will have to complete the connection by filling out a form which is visible on the following image:

[Screenshot of QuickBooks Online Settings showing various export and import options, with purple callouts explaining that some settings must be configured and that QuickBooks will import items and customers.]

Get Started