

QuickBooks desktop integration overview

The [QuickBooks Desktop integration](#) is disabled by default. Please contact Customer Service by phone or chat to request that it be enabled. You will be asked to read and sign a legal disclaimer, then email it back to them.

Pro-Tip! It is suggested that you contact support via normal business hours when making this request. After-hours support may not have access to send you the appropriate documentation without escalating your request to a higher-level team member.

Important! This tool only syncs data *from* Infusionsoft by Keap *to* QuickBooks. For a more complete solution, check the [Keap Marketplace](#) for a vendor.

Infusionsoft by Keap integrates with the desktop version of QuickBooks. It gives you the ability to export invoice and payment data (cash payments, returns, refunds, & credits) from Infusionsoft by Keap and use it to update QuickBooks.

Important! Please review the QuickBooks integration documentation thoroughly before you begin using this feature and back up your QuickBooks Data before each import. Follow the QuickBooks setup instructions in order. Do not skip or re-order any of these steps!

Infusionsoft by Keap has made this feature available; however, Keap employees are not able to access your QuickBooks data or offer any advice, suggestions, or ideas about accounting practices or processes.

FAQs

Here are some additional tips and the answers to the questions our users most frequently ask about the QuickBooks desktop integration:

- Always back up your QuickBooks data before each import.
 - Your accounting expert should be in charge of mapping QuickBooks accounts to Infusionsoft by Keap products.
 - Test the Import using an EXACT copy of your working QuickBooks file before you import into your actual QuickBooks file.
 - This process moves data from Infusionsoft by Keap to QuickBooks only. It does NOT move any data from QuickBooks to Infusionsoft by Keap.
 - Keap employees do not support QuickBooks and cannot advise you about managing QuickBooks data or about accounting best practices.
 - QuickBooks does NOT support payment plans. Invoices you import into QuickBooks will appear as a single invoice, even if there is a payment plan attached to the order.
 - Product Items in QuickBooks desktop are the QuickBooks accounts.
 - The IIF file does not import "classes."
 - The Payment Credit Account and the Credit Credit Account are both accounts receivable. The Payment Credit Account is for actual funds received. The Credit Credit account is for credits, comps, freebies, etc. that you've given to customers.
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