

# Easy-Commission QuickBooks® Online Export Guide

Version 1.0

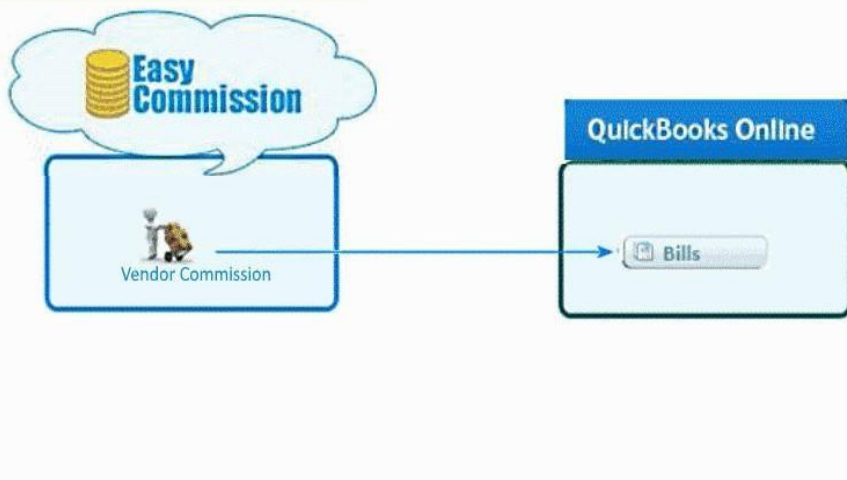
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## 1. Introduction

This document helps the user to know the steps involved in Exporting data from Easy-Commission to QuickBooks® online. To export data user has to authenticate Easy-Commission with QuickBooks® Online account.

## 2. Export Diagram



## 3. Steps involved in Export Process

### a) Connect to QuickBooks® Online

#### i. **One time setup**

Before proceeding with Export process, Easy-Commission needs to be authenticated with QuickBooks® online account.

>> Payout Process>> Export To QuickBooks® Online

### Export to QuickBooks® Online

This page allows you to Export data to QuickBooks Online.



The imported data is getting calculated and the data is getting exported back to QBO in the form of Bills.

Please follow the steps in "View/Print the Export instructions" page to export data to QuickBooks Online.

 You are connected to QuickBooks® Online. [Disconnect](#)

#### Export Commissions

QuickBooks® Online


Within the current period dates (1/1/2017 to 1/31/2017)



#### Export Instructions

1. Make sure you have setup the sales rep name in the Vendor page.
2. Current period Commission details for the sales rep will be exported as Bills in QuickBooks® Online.

[Export Data](#)

 Easy-Commission is authenticated with QuickBooks® Online to Export data. Click on the 'Export' button to initiate export process.

Click "Connect to QuickBooks®" button to initiate the authentication process with Easy-Commission account. A new page will be shown and asking to "Connect to QuickBooks®"

Welcome to Easy-Commission

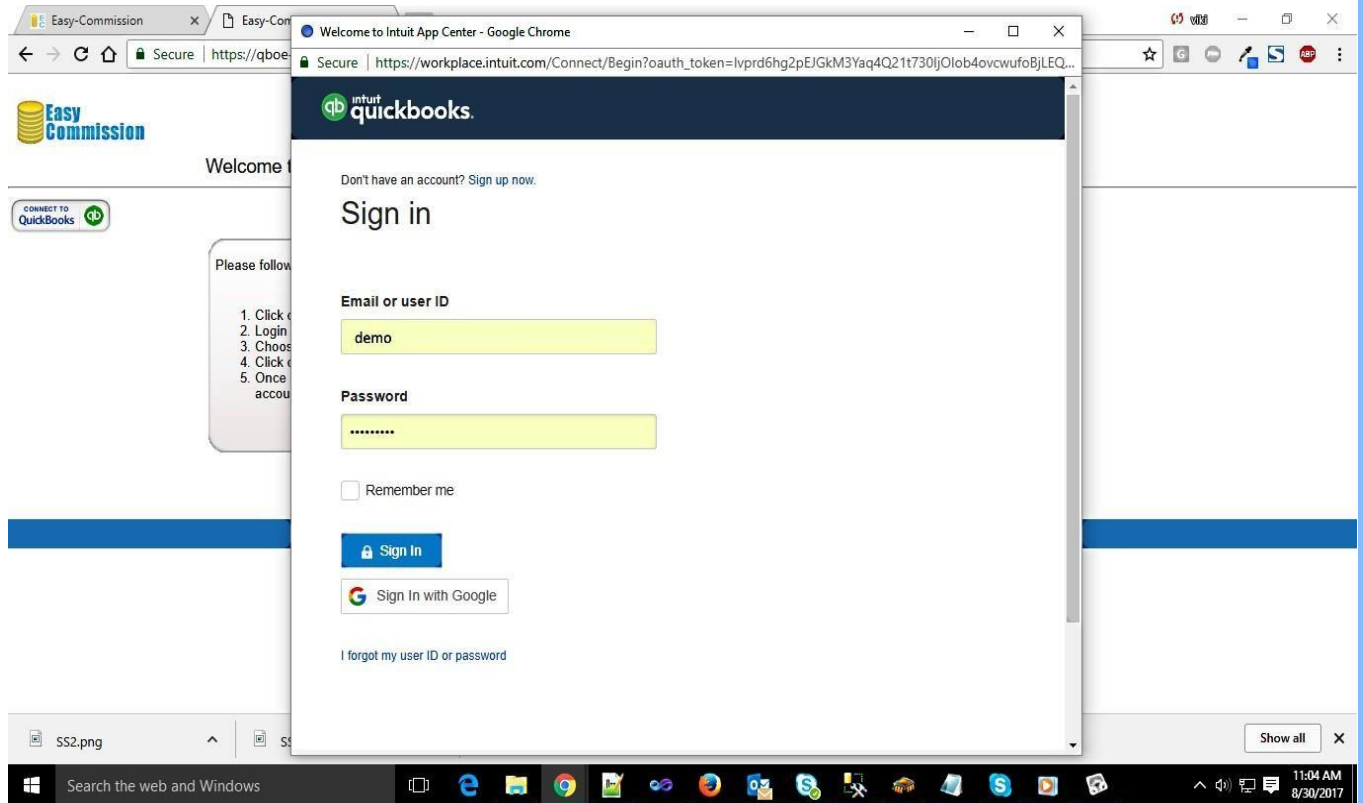


Please follow the below steps to authorize your QuickBooks® Online company.

1. Click on the "Connect To QuickBooks" button.
2. Login with your Intuit® App Center credentials.
3. Choose the QuickBooks® Online company file.
4. Click on "Authorize" button to authorize your QuickBooks® Online company file.
5. Once authorization is done, please close this window and return to your Easy-Commission account.

Powered by QXchange

Another new page will be opened and it will be asking for the QuickBooks® online account credentials.



Click on "Authorize" button to authenticate Easy-Commission application.

## Authorize the Sharing of Your Data Between QXchange Auth Client for QuickBooks and Intuit



Sample Test



QXchange Auth Client for QuickBooks

By clicking Authorize, I allow CellarStone Inc and Intuit to use my information\* in accordance with each company's respective terms of service and privacy policy CellarStone Inc's [Terms of Service](#) and [Privacy Policy](#). Additionally, where applicable, I give CellarStone Inc limited access to my QuickBooks Payments account to provide me payments-related services. I authorize the sharing of data between Intuit and CellarStone Inc. \*Information may include data from QuickBooks Online, QuickBooks Desktop and QuickBooks Payments.

No, thanks

Authorize

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User will be shown the connection status.



Welcome to Easy-Commission

 You are connected to QuickBooks®. [Disconnect](#)

Please follow the below steps to authorize your QuickBooks® Online company.

1. Click on the "Connect To QuickBooks" button.
2. Login with your Intuit® App Center credentials.
3. Choose the QuickBooks® Online company file.
4. Click on "Authorize" button to authorize your QuickBooks® Online company file.
5. Once authorization is done, please close this window and return to your Easy-Commission account.

Powered by [QXchange](#)

Close this page & go back to Easy-Commission Application.

b) Initiating Export process

i. **Export of Vendor Commission:**

Before exporting commission to vendor as bills, make sure that Sales Rep (who is actually the Vendor in QuickBooks®) in Easy-Commission has "Employee" field unchecked and "Accounts Payable" field filled with Vendor's QuickBooks® online Account name (example, "AccountsBasedExpenseLineDetail") as shown below

Rep - Edit

Save Cancel

Reps are the people that would get paid commissions.  
 Login information of Rep can be sent to their mail address[specified in Login ID] just by clicking onto Notify button that shows up on edit.

 [How to setup a rep in Easy-Commission?](#)

**Note :** Reps without a plan will get commission based on default plan.  
 Click [here](#) to increase the subscription count or view the Users-reps details.

**Rep Name\***

**Login Email ID\***  Notify

Rep's plan:

**Employee**

**Job\***

**Manager**  Q ☰

**Active**

**Territory**  Q ☰

**Contact Information**

**Address1**

**Address2**

**City**

**State/Province**

**Postal Code**

**Phone Number**

**Fax**

**Alternate Email id**

**Other**

**Accounts Payable**

**Government ID**

**Comments**

**Minimum Pay Threshold Adjusment**

**Owner**  Q


Fields marked with (\*) are required.  
 Created By: compadmin034@cellarstone.com

Last updated at: 1/5/2015 08:00 AM

Save Cancel

Master Data >> Vendor Next Step Related Info

Vendor - View ✎ 📄 ✕ 🖨

 A vendor is typically an organization or individual that supplies goods or services.

<b>Vendor Name *</b>	<input type="text" value="Vendor1"/>	<b>Associated Rep Name</b>	<input type="text" value="Sample Smith"/>
<b>Address 1</b>	<input type="text"/>	<b>Address 2</b>	<input type="text"/>
<b>City</b>	<input type="text"/>	<b>State-Province</b>	<input type="text"/>
<b>Postal Code</b>	<input type="text"/>	<b>Country</b>	<input type="text" value="United States of America"/>
<b>Industry</b>	<input type="text"/>	<b>Sub Industry</b>	<input type="text"/>
<b>Industry Code</b>	<input type="text"/>	<b>Contact Name</b>	<input type="text"/>
<b>Fax</b>	<input type="text"/>	<b>Phone</b>	<input type="text"/>
<b>Mobile</b>	<input type="text"/>	<b>Email ID</b>	<input type="text"/>
<b>Terms</b>	<input type="text"/>	<b>URL</b>	<input type="text"/>
<b>Comments</b>	<input type="text"/>		
<b>Owner</b>	<input type="text" value="compadmin034@cellarstone.com"/>		

Fields marked with (\*) are required.  
Created By: viki\_build26\_test2@cellarstone.com Last updated at: 8/29/2017 09:46 PM

## ii. Initiate Export process for QuickBooks® Online

After authentication, the user can return back to Easy-Commission Application to begin export by clicking on "Export Data" button.




### Export to QuickBooks® Online

This page allows you to Export data to QuickBooks Online.



The imported data is getting calculated and the data is getting exported back to QBO in the form of Bills.

Please follow the steps in "View/Print the Export instructions" page to export data to QuickBooks Online.

 You are connected to QuickBooks® Online.

[Disconnect QuickBooks® Online](#)

#### Export Commissions

QuickBooks® Online

Within the current period dates (1/1/2017 to 1/31/2017)




[View/Print the Import instructions](#)

#### Export Instructions

1. Make sure you have setup the sales rep name in the Vendor page.
2. Current period Commission details for the sales rep will be exported as Bills in QuickBooks® Online.

[Export Data](#)

 Easy-Commission is authenticated with QuickBooks® Online to bring in your data. Click on the 'Export Data' button to initiate export process.

Now user could see the Export process status.

### Export to QuickBooks® Online

This page allows you to Export data to QuickBooks Online.



The imported data is getting calculated and the data is getting exported back to QBO in the form of Bills.

Please follow the steps in "View/Print the Export instructions" page to export data to QuickBooks Online.

You are connected to QuickBooks® Online. [Disconnect QuickBooks® Online](#)

#### Export Commissions

QuickBooks® Online

Within the current period dates (1/1/2017 to 1/31/2017)




[View/Print the Import instructions](#)

#### Export Instructions

1. Make sure you have setup the sales rep name in the Vendor page.
2. Current period Commission details for the sales rep will be exported as Bills in QuickBooks® Online.

[Export Data](#)

 Export process is currently running. Please wait...

After the completion of export, you can find a new bill created in QuickBooks® Online account for related vendor

Bill no. Demo.112017 ? X

Vendor1 BALANCE DUE  
**Rs600.00**  
Make payment

Mailing address: Vendor1  
 Terms:   
 Bill date: 31/01/2017  
 Due date: 31/01/2017  
 Bill no.: vikitest112017

Amounts are:

▼ Account details

#	ACCOUNT	DESCRIPTION	AMOUNT	BILLABLE	CUSTOMER	CLASS
1	TDS Payable		600.00			
2						

Add lines Clear all lines

► Item details

Memo:

Subtotal: Rs600.00  
Total: Rs600.00  
Roundoff:

Attachments Maximum size: 25MB  
  
[Show existing](#)

Privacy

Cancel Make recurring More Save **Save and new**

#### 4. FAQ

- What are all the Easy-Commission data that can be exported to QuickBooks® online?** Commission for vendor sales rep can be exported as Bills to QuickBooks® Online.
- Why no bills are getting created in QuickBooks® Online even after successful export?**

Ensure the following field values are appropriate in your Easy-Commission account.

- In Rep page, Employee flag has to be unchecked
- In Rep page, Accounts Payable field is set to correct account name
- In Vendor page, Associated Rep Name field has appropriate Rep name selected