



# STACK + QuickBooks Online FAQ

## What is the new QuickBooks Online integration?

This is a direct integration between your STACK account and your QuickBooks Online (QBO) account to seamlessly transfer your STACK Material & Labor Estimate data to QuickBooks Online.

## How does this integration work?

The STACK Item Accounting Code is used to map your STACK Material & Labor Estimate data to your QuickBooks Online Products & Services during export. We look for a QuickBooks Online Item (which includes the Name of the item plus its categories) that exactly matches the STACK item's Accounting Code.

## How do I connect my STACK account with my Quickbooks Online account? Am I required to use the same login credentials?

You will find the new QuickBooks Online integration listed under the App Integrations section of your Account Settings. Simply sign in with your QuickBooks Online credentials of choice to connect the two accounts. *NOTE: Only a STACK account owner can establish and export to QuickBooks Online.*

## What kind of data transfers with this integration?

This data is exported from the STACK estimate to QuickBooks Online:

- STACK Adjusted Quantity = QBO QTY (quantity)
- STACK (Selling Price divided by Adjusted Qty) = QBO Rate
- STACK Selling Price = QBO Amount
- STACK Accounting Code = QBO Item (Categories + Name in Products & Services)\*
- STACK Name = QBO Description\*
- STACK Terms and Conditions + Scope of Work = QBO Message displayed on estimate

*NOTE: Tax is NOT exported from STACK so you can apply and customize the tax rate for each item as needed within QBO.*

*\*If the STACK Accounting Code matches an existing QBO Item, the QBO Item (Categories + Name) and Description are retained; the STACK Item Name will not replace the existing QBO Description.*

## Will STACK create products or services in QuickBooks Online as it imports?

STACK will try to match to an existing product or service, and if we cannot find a match, then we will create the product or service in QuickBooks Online.

## How much does integration cost?

This integration is included with your STACK Pro subscription.

## Will the export create items in QuickBooks Online? If so, what kind of items?

If STACK is unable to find an item during the export, we will create the item in QuickBooks as a non-inventory item. From there, you may edit the item in QuickBooks Online.

## If I filter through a M&L Estimate and then export, will it export my filtered data or the full list?

We will abide by any filters you apply to the STACK estimate. STACK will only export the data that is displayed.

## Could we make changes to our STACK estimate prior to export?

You may update any editable field on the STACK estimate worksheet prior to exporting to QuickBooks Online. This includes waste percentage, unit price, line item markup, overhead markup, and additional markup, as well as non-measured items. These changes reflect in the values we send to QuickBooks Online.

## Will we have the option of sending estimates through STACK as well as QuickBooks Online?

This integration offers the option to complete an estimate through QuickBooks Online using your STACK Material & Labor Estimate data. You may still create a STACK proposal directly within STACK if you choose.

## Can I send data back to STACK from QuickBooks Online?

This integration currently sends data from STACK to Quickbooks Online only.

## What will happen when I export the same estimate again? Will this update an existing estimate in QuickBooks Online?

No, we will create a new estimate in QuickBooks Online that reflects the latest information.

## Can a STACK user send info to QuickBooks Online if they do not have direct access?

To utilize this integration, you do NOT have to be signed in to QBO. You need to be a STACK account owner and your account needs to have the QBO app integration connected (even with someone else's credentials).

## How can I learn more about the Quickbooks Online integration?

Please review our [Export Your STACK Estimate to Quickbooks Online](#) guide for full details. If you have additional questions, please reach out to your Customer Success Manager, or call us at 866.702.6078 x1