

QuickBooks CRM - Agile CRM

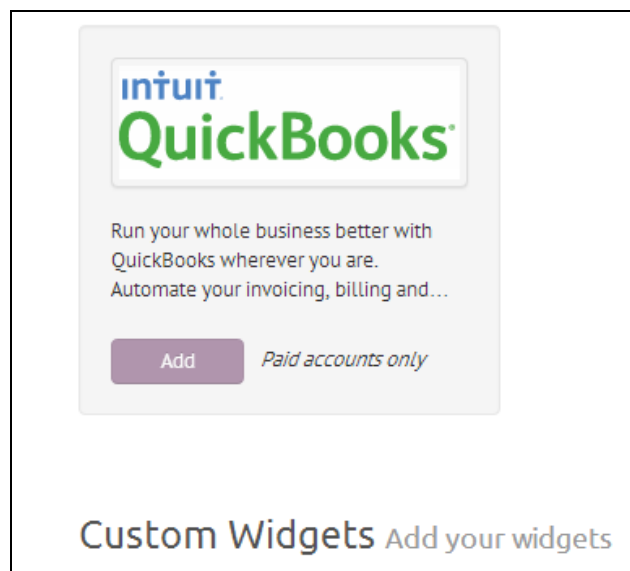
QuickBooks is an online accounting solution. Businesses rely on QuickBooks to manage all of their finances, from payments and invoices to payroll and bookkeeping.

QuickBooks integration in Agile CRM lets you manage payments and invoices directly from contact pages in the CRM. If you have a QuickBooks account, simply authorize Agile to integrate with your QuickBooks account and you'll immediately be able to create and send invoices, track and receive payments and see customer payment histories on contact pages in the CRM.

The QuickBooks integration takes the form of an interactive widget. Here's how to set up the widget:

1. Locate the Widget

Add the widget from the '+ Manage Widgets' button on any contact page, or go to Preferences > Widgets and find the QuickBooks plugin in the Billing section. Click 'Add'.



2. Link your QuickBooks account

You'll now see a QuickBooks account page. Create a new account if you don't already have one, then enter your account details. Now click the 'Link your Account' button to integrate Agile with your QuickBooks account, then the 'Authorize' button to authorize the integration. This lets Intuit (the maker of QuickBooks) share data with your Agile CRM account.



intuit.

Don't have an account? [Sign up now.](#)

Sign in

Email or user ID

Password

Remember me

[Sign In](#)

3. Manage your Invoices

Once you have authorized the plugin, open any contact page in Agile and the QuickBooks widget will display all the invoices related to the contact. You can also now create and send invoices, and track and receive payments, without ever leaving the dashboard. Agile is now the new generation QuickBooks CRM.

Invoice
?

Choose a customer
Email

BALANCE DUE

\$240.00

Billing address	Terms	Invoice date	Due date
# 402, 7 th Cross, Bakers Street, California, USA - 93504	Net 30	18/07/2014	17/08/2014

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT
1	T-Shirts		4	50	200.00
2	Jeans		2	20	40.00

Add lines Clear all lines

Message displayed on invoice

Subtotal **\$ 240.00**

Discount percent **\$ 0.00**

Total **\$ 240.00**

Balance due **\$ 240.00**

Invoices

- + 1003
\$ 340

Google Nexus 4 \$ 200

Nokia Headset \$ 40

Asus Hard disk \$ 100

26 days from now Paid
- + 1005
\$ 410

Apple ipod \$ 250

Samsung Bluray disk player \$ 160

26 days from now Due
- + 1004
\$ 270

Toshiba DVD Recorder \$ 150

UC Bluetooth Headset \$ 120

26 days from now Paid

Related Links:

[Stripe - Agile CRM Billing Integration](#)

[FreshBooks - Agile CRM Billing Integration](#)

[Xero - Agile CRM Billing Integration](#)

[Agile CRM - Home](#)