QuickBooks CRM - Agile CRM

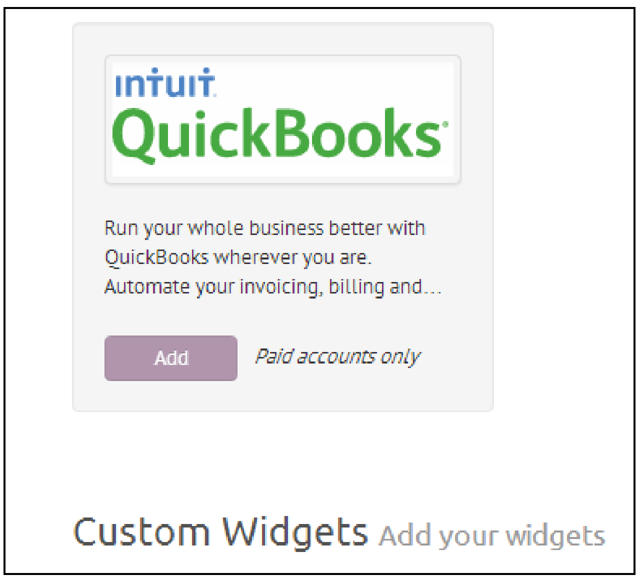
QuickBooks is an online accounting solution. Businesses rely on QuickBooks to manage all of their finances, from payments and invoices to payroll and bookkeeping.

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'.

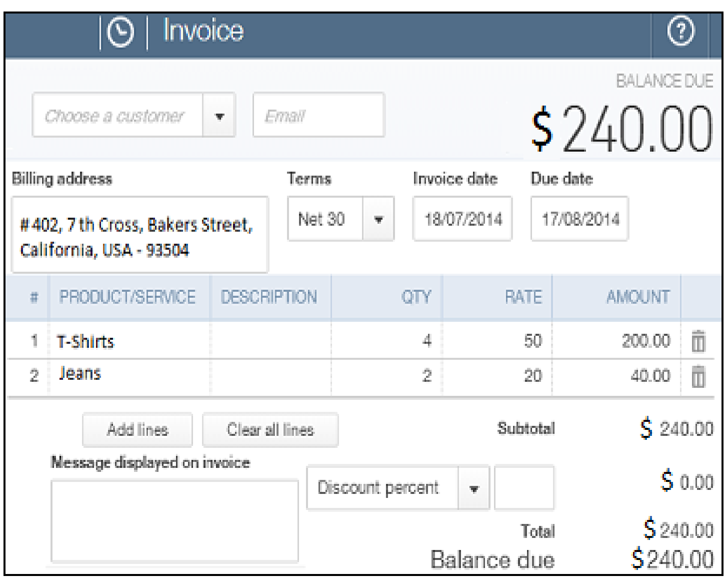


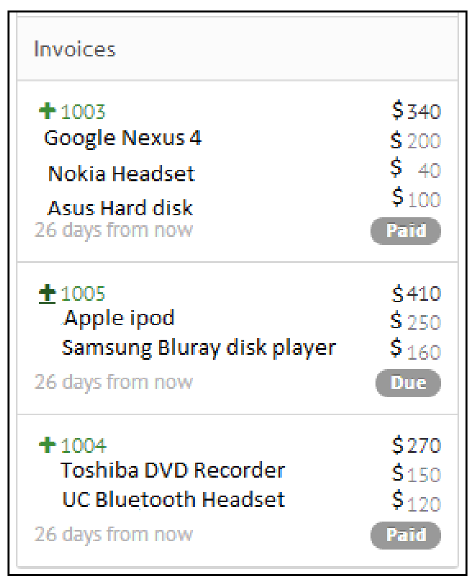
2. **Link your QuickBooks account**

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.

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.





Related Links:

Stripe – Agile CRM Billing Integration

FreshBooks – Agile CRM Billing Integration

Xero – Agile CRM Billing Integration

Agile CRM - Home