

Bonterra™

**Setting up the
QuickBooks Online
Integration**

Agenda

QBO Integration 101

Setup in Donor Management

Mapping to QuickBooks

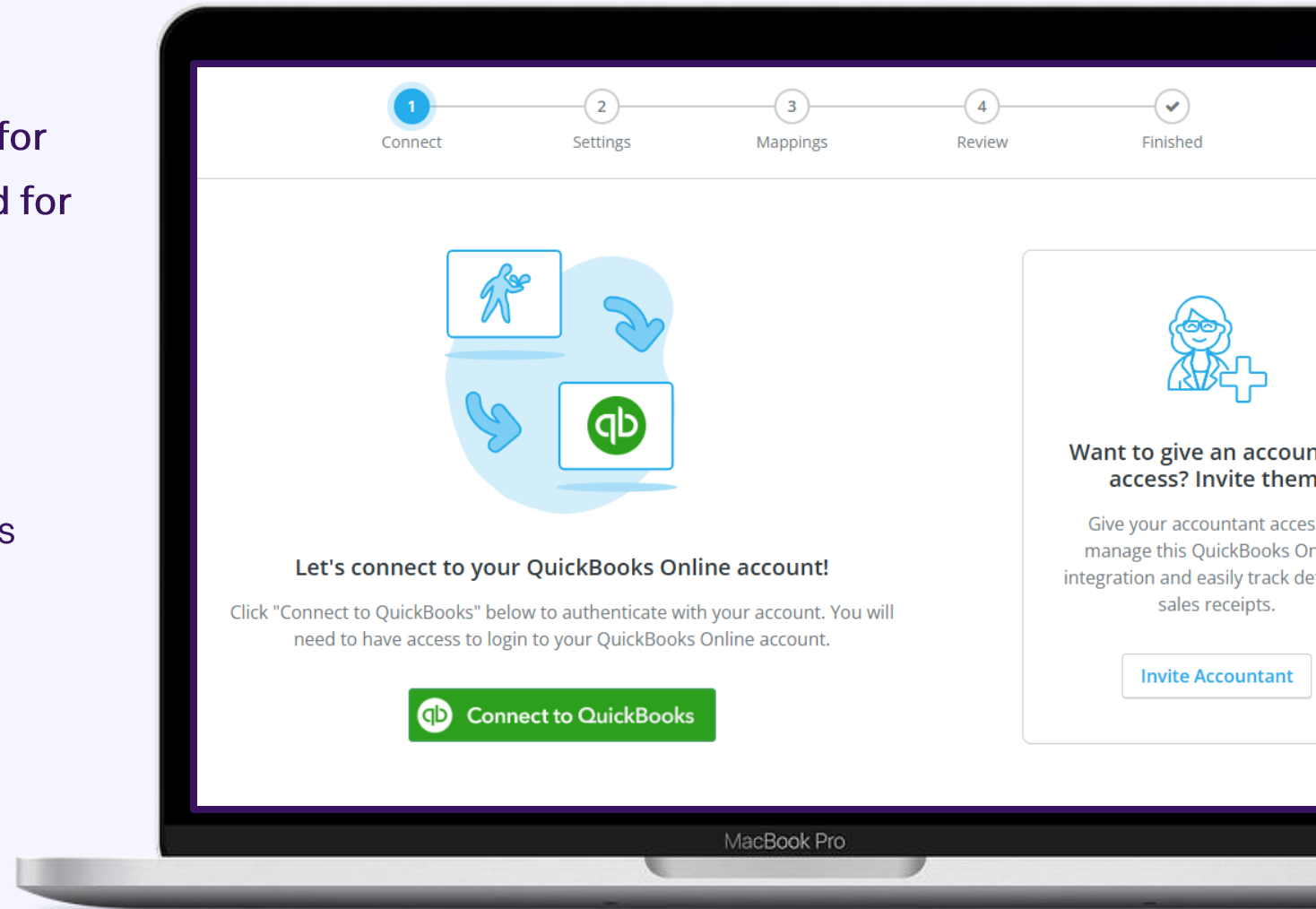
Syncing Transactions

QuickBooks Online Integration 101

The QuickBooks Online Integration with Network for Good improves workflows by eliminating the need for double entry of donations.

- All online donations are automatically in DMS
- Enter/import any offline donations in DMS
- Perform a one-way sync from NFG to QuickBooks Online
- Choose to sync all transactions or specific ones
- Uses Product/Service and Class for mapping

Important: This integration does not work for the desktop version of QuickBooks.



Setup in Donor Management

Additional Resources

Contacting the Customer Support Team | Mon-Fri | 8am – 7pm ET

Chat



- In-app messenger support for quick, technical questions
- Blue dot in bottom right corner of system
- Expect a reply in 2-3 hours



Email



- success@networkforgood.com
- Dedicated team to resolve product problems and questions
- Expect a reply in 2-3 business days

But first!



You can access **View Guides and Help Articles** in the Help tab in your software to find a comprehensive library of articles, guides, walkthroughs, and videos.

Q & A

We value your feedback!

- Ask questions about functionality covered in this training
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you!

Bonterro