
Easy3PL QuickBooks Online Integration User Guide

Admin setup, mapping maintenance, and day-to-day invoice sync from Easy3PL to QuickBooks Online.

Who should use this guide

- Administrators who connect QuickBooks and maintain client and item/service mappings.
- Accounting users who review invoices and send approved invoices to QuickBooks.
- Managers who need to understand what sync status means without managing the integration.

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1. What This Integration Does

The Easy3PL QuickBooks Online integration sends invoices created in Easy3PL into the warehouse/operator QuickBooks Online company. Easy3PL remains the source of truth for warehouse activity, client fee rules, invoice generation, receipt/order/eOrder references, and operational history. QuickBooks Online becomes the downstream accounting system for accounts receivable, financial reporting, and accountant workflows.

This is an operator accounting integration. It is separate from any future client commerce or brand-side QuickBooks integration.

- Easy3PL client maps to a QuickBooks Customer.
- Easy3PL charge or fee type maps to a QuickBooks Product/Service item.
- Easy3PL invoice syncs to a QuickBooks Invoice.
- QuickBooks payment/status pullback is optional and should be enabled only when the accounting team wants QuickBooks to drive paid/open status back into Easy3PL.
- Invoice voids and credits should be handled intentionally through a void or credit memo strategy, not by silently deleting accounting records.

2. Guide Structure and Access

This guide is split into two practical parts. Part A is for administrators who manage the connection and mappings. Part B is for users who only need to send invoices to QuickBooks and understand the sync results.

- QuickBooks connection and mapping maintenance is an administrator workflow under Administration > Other Integrations > QuickBooks Online Integration.
- Sending invoices from Accounting > Invoices requires invoice access and the invoices.quickbooks.sync right.
- Client users and warehouse-only users should not manage the QuickBooks connection or send invoices to QuickBooks.

Part A - Admin: Confirm the Connection

Before maintaining mappings or syncing invoices, confirm that Easy3PL is connected to the correct warehouse/operator QuickBooks Online company. Easy3PL staff handles app credentials and server configuration separately; this guide only covers the customer-facing Easy3PL workflow.

1. Open Administration > Other Integrations > QuickBooks Online Integration.
 2. Confirm the status badge shows Connected.
 3. Confirm the company name is the QuickBooks company that should receive invoices.
 4. If the page is not connected, use Connect QuickBooks or Reconnect QuickBooks and choose the correct QuickBooks company.
 5. Review the Sync Log for the latest connection event.
- Reconnect only when tokens expire, the authorized QuickBooks user changes, or accounting intentionally changes the connected company.
 - If the connected company looks wrong, stop and contact Easy3PL support before syncing invoices.

The screenshot shows the 'EasyWMS' interface with a 'QuickBooks' integration status of 'Connected'. The breadcrumb trail is 'Administration > Other Integrations'. The main heading is 'Easy3PL QuickBooks Connection'. Below this, a note states: 'The integration page should show Connected before mappings or invoice sync are'. A table displays the following details:

Company	3PL Miami Warehousing LLC
Realm ID	934...343
Environment	production
Status	Connected

Easy3PL QuickBooks Connection

The integration page should show Connected before mappings or invoice sync are used.

Part A - Admin: Accounting References

Accounting references control defaults used when Easy3PL creates QuickBooks accounting records. When possible, select values from the QuickBooks-loaded dropdowns instead of entering raw IDs.

Field	How to Use It
Default income account ref	Used when Easy3PL must create a new QuickBooks Product/Service item for an invoice charge. Select the income account that should receive warehouse billing revenue.
A/R account ref	Usually leave as Use QuickBooks default A/R account unless accounting specifically needs a non-default accounts receivable account.
Deposit account ref	Reserved for payment pullback or payment posting behavior. If Easy3PL is only pushing invoices, this can usually stay blank.
Default tax code ref	Select a tax code only if the operator needs tax code defaults on pushed invoices. For many non-taxed 3PL invoices, this may stay blank or use the non-taxable code selected by accounting.

EasyWMS

QuickBooks

Easy3PL Setup

Accounting References

Use QuickBooks-loaded dropdowns for income account, A/R behavior, deposit account,

Default income account ref	Warehouse Service Revenue
A/R account ref	Use QuickBooks default A/R account
Deposit account ref	Undeposited Funds
Default tax code ref	NON - Non Taxable

Accounting References

Use QuickBooks-loaded dropdowns for income account, A/R behavior, deposit account, and tax code defaults.

Part A - Admin: Customer Mapping

Every invoice belongs to an Easy3PL client. Before pushing invoices, map each Easy3PL client to the exact QuickBooks Customer that should receive invoices.

1. Open the Customers tab in the Mappings section.
 2. Search or browse QuickBooks customers from the row for the Easy3PL client.
 3. Select the correct QuickBooks customer result. The QuickBooks ID and display name should populate into the mapping fields.
 4. Click Save mapping.
 5. Confirm the row changes from unmapped to mapped.
- Do not guess customer IDs manually. Search or browse QuickBooks when possible.
 - If multiple QuickBooks customers have similar names, choose the exact billing customer used by accounting.
 - If a customer is missing from QuickBooks, create or activate it in QuickBooks first, then refresh/search again in Easy3PL.
 - Changing a mapping affects future invoice syncs. It does not rewrite invoices already pushed to QuickBooks.

EasyWMS

QuickBooks

Mappings > Customers

Customer Mapping

Save mapping

Map each Easy3PL client to the exact QuickBooks Customer before invoice sync.

Easy3PL client	Advanced Home Theater
QBO ID	117
QBO Name	Advanced Home Theater
Find QuickBooks customer	Search QBO / Browse QBO

Customer Mapping

Map each Easy3PL client to the exact QuickBooks Customer before invoice sync.

Part A - Admin: Items and Services Mapping

Easy3PL invoice lines are created from warehouse fees and charge types. Each charge should map to a QuickBooks Product/Service item so revenue lands in the correct accounting category.

1. Open the Items / Services tab in the Mappings section.
 2. Search or browse QuickBooks items/services for each Easy3PL charge or fee type.
 3. Select the matching QuickBooks item/service result.
 4. Click Save mapping.
 5. Repeat until the charges used on invoices are mapped.
- Use clear QuickBooks item names such as Receiving Labor, Storage, Pick and Pack, Label Fee, Pallet Handling, or Custom Handling.
 - If a charge is not mapped and Easy3PL is allowed to create a missing Product/Service item, the Default income account ref must be configured.
 - Mapping is preferred over automatic creation because accounting controls the item names, income accounts, and reporting categories.

EasyWMS

✔ QuickBooks

Mappings > Items / Services

Items / Services Mapping

Product/Service

Map warehouse fee types and charge names to QuickBooks Product/Service items.

Easy3PL charge	Monthly Storage
QBO ID	84
QBO Name	Storage Revenue
Find QuickBooks item/service	Search QBO / Browse QBO

Items / Services Mapping

Map warehouse fee types and charge names to QuickBooks Product/Service items.

Part B - Users: Before Sending an Invoice

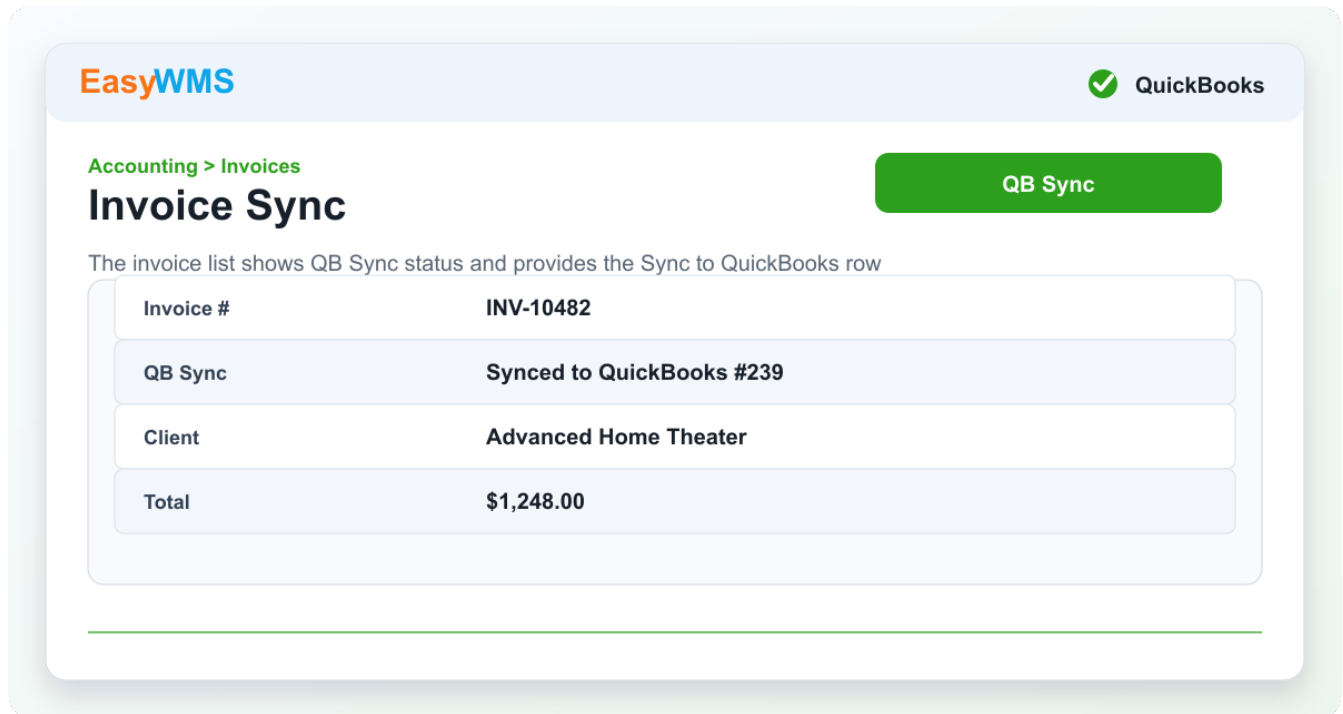
The user workflow starts from Accounting > Invoices. Before sending, review the invoice like any other customer-facing invoice. The QuickBooks action does not replace invoice review.

- The invoice client is correct.
- The invoice total and invoice lines look correct.
- The invoice is ready for accounting and should be created in QuickBooks.
- The QB Sync column is blank or not already synced.
- You have permission to use the Sync to QuickBooks action.

Part B - Users: Send Invoice to QuickBooks

After setup is complete, accounting users can send approved Easy3PL invoices to QuickBooks Online from the invoice list.

1. Open Accounting > Invoices.
 2. Review the invoice total, client, invoice lines, and billing period.
 3. Click Sync to QuickBooks.
 4. Wait for the success message and confirm the QB Sync column shows the invoice as synced.
 5. Open the Sync Log if any error is returned.
- Users need invoice view access plus the invoices.quickbooks.sync right to use the Sync to QuickBooks action. Administrators still bypass rights checks.
 - Easy3PL will not create duplicate QuickBooks invoices for an invoice already mapped to a QuickBooks invoice ID.
 - If sync fails, fix the mapping/settings problem and retry. The sync log is meant to make that loop visible.



Invoice Sync

The invoice list shows QB Sync status and provides the Sync to QuickBooks row action.

Part B - Users: QB Sync Column and Status

The invoice list includes a QB Sync column. A green indicator means the Easy3PL invoice has been pushed and mapped to a QuickBooks invoice. If the column is blank, the invoice has not been pushed yet or the sync did not complete successfully.

- Use the QuickBooks invoice ID in history/logs when accounting needs to verify the invoice inside QuickBooks.
- If payment/status pullback is enabled later, paid/open information can be reconciled from QuickBooks into Easy3PL according to the configured strategy.

Part B - Users: Error Resolution

Most sync errors mean a mapping or accounting reference needs attention. Fix the issue, then retry the sync from Easy3PL.

Message or Symptom	What to Check
QuickBooks Online is not connected	Ask an administrator to reconnect QuickBooks from the integration page.
QuickBooks ID is required	Select a QuickBooks search/browse result or enter a valid QuickBooks ID before saving the mapping.

Message or Symptom	What to Check
Multiple customers/items match	Create an explicit mapping in Easy3PL so sync does not guess.
Item does not exist and no income account ref is configured	Map the charge to an existing QuickBooks item/service or configure Default income account ref for item creation.
Unauthorized or expired token	Reconnect QuickBooks from the integration page.
Tax or account validation error	Review the selected tax code, income account, A/R behavior, and item/service setup in QuickBooks.

EasyWMS

✓ QuickBooks

QuickBooks Online Integration

Sync Log and Error Resolution

Sync Log

Use the Sync Log to see authorization, mapping, sync, retry, and error events.

Date	7/22/2026, 11:54 AM
Entity	invoice #10482
Operation	sync
Status	succeeded
Message	Created QuickBooks invoice 239.

Sync Log and Error Resolution

Use the Sync Log to see authorization, mapping, sync, retry, and error events.

Part A - Admin: Disconnecting or Reconnecting

Disconnecting removes the active token connection but keeps the sync history. Reconnecting should be used when tokens expire, the QuickBooks company changes, permissions change, or accounting intentionally rotates the authorized QuickBooks user.

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- Do not disconnect during active invoice posting unless accounting knows the impact.
 - After reconnecting, confirm the company name and realm ID still point to the intended QuickBooks company.
 - Review mappings after reconnecting if the connected company changed.

Admin Go-Live Checklist

- Easy3PL QuickBooks page shows Connected.
- Default income account is selected if Easy3PL may create missing service items.
- A/R account is left as QuickBooks default unless accounting asked otherwise.
- Customer mappings are complete for the clients that will be invoiced first.
- Item/service mappings are complete for the invoice charges that will be pushed first.
- A test invoice has been reviewed in Easy3PL before pushing.
- The first synced invoice is verified inside QuickBooks Online.
- The Easy3PL Sync Log is reviewed for success or error detail.