

# QuickBooks Online

Last Modified on 23/09/2022 4:07 pm EDT

Offered in RentalPoint v12, Once configured, all invoices, payments and credits processed in RentalPoint, can now be exported to Quickbooks Online!

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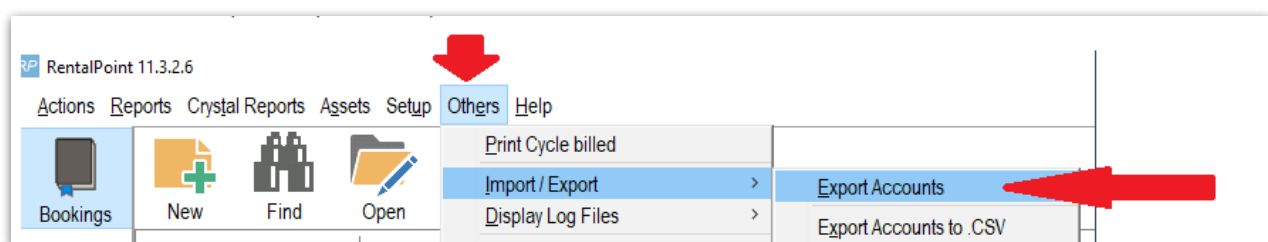
## How to Export RentalPoint Accounts to QuickBooks Online

Once RentalPoint is configured to work with QuickBooks Online, every time you produce an invoice, credit, payment or payment reversal, the information will be stored and ready to export to QuickBooks Online.

Use the steps below to export RentalPoint accounts to Quickbooks Online at whatever intervals you prefer.

Configuration steps are outlined further below. Contact [support@rentp.com](mailto:support@rentp.com) for assistance with configuration as needed.

Click Others-->Import/Export-->Export Accounts



Then click Export



Depending on your setup, you may need to login to QuickBooks to proceed.

RP OAuth Web-Login

intuit.

turbotax quickbooks mint

### Sign In

One account for everything Intuit, including QuickBooks. [Learn more](#)

Email or user ID

rentp.mandy@gmail.com

Password

Remember me

**Sign In**

*By clicking Sign In, you agree to our Terms and have read and acknowledge our Privacy Statement.*

[I forgot my user ID or password](#)

This windows will close automatically when a token could be detected and extracted. [Close](#)

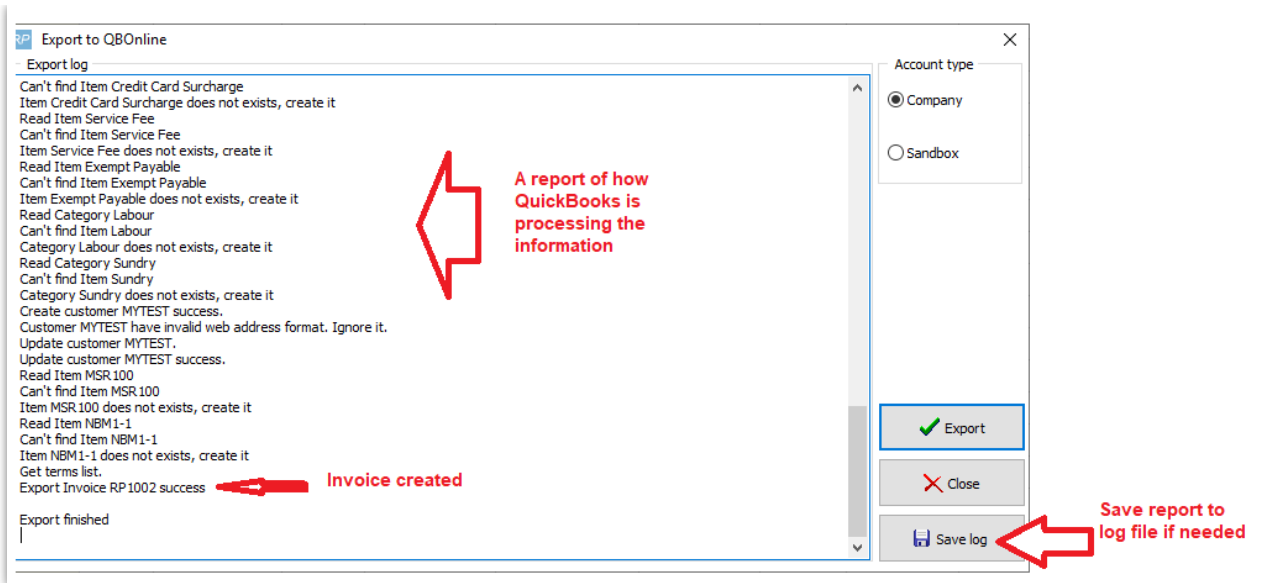
While RentalPoint is waiting for a successful login you will see this message

RP OAuth Web-Login

Please wait for external browser

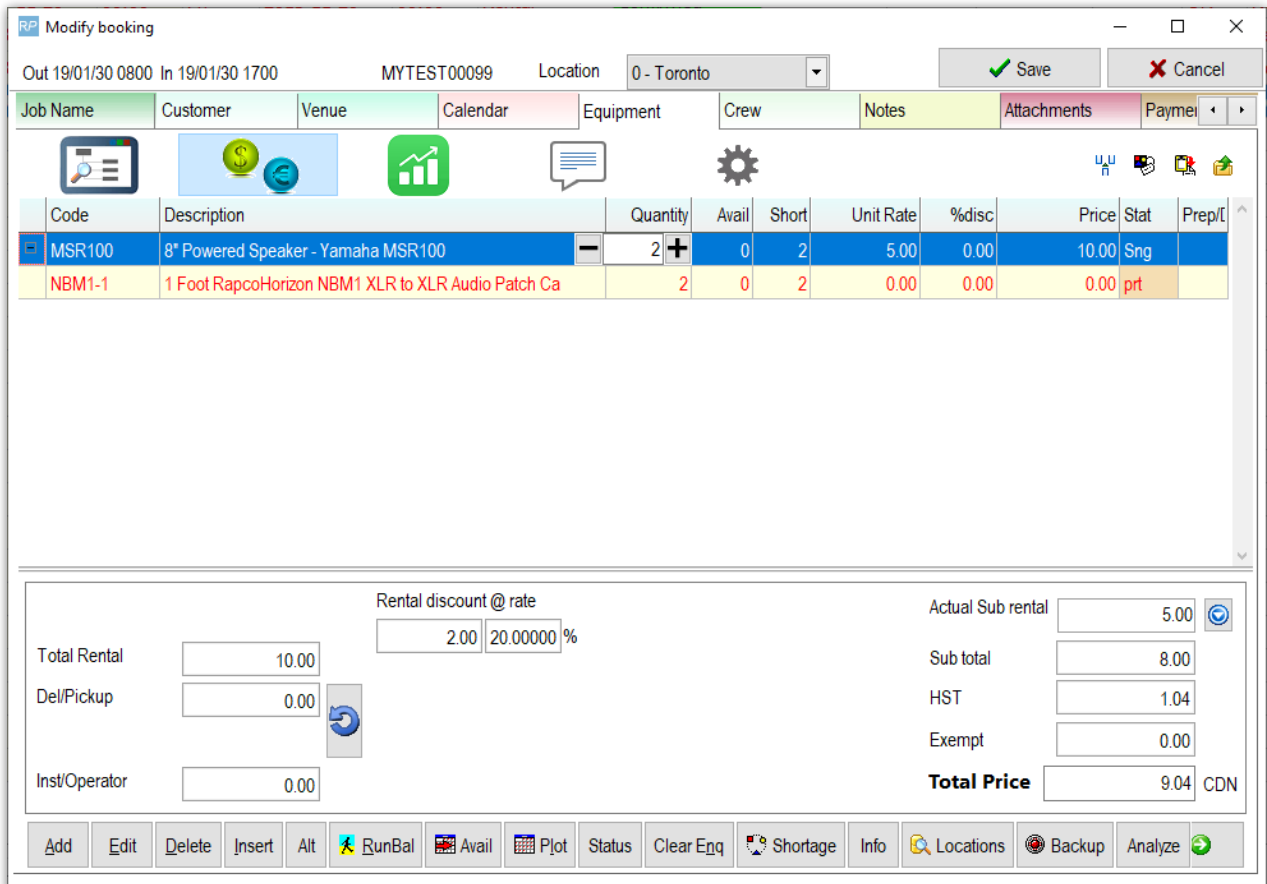
Once logged in, you'll see information on your screen as the invoices are exported to QuickBooks.

You'll see a report of how the information is processed and an 'Export Finished' message when complete.



## Sample Booking & Corresponding QuickBooks Invoice

### Booking in RentalPoint



### Invoice in Quickbooks once exported

Invoice no.RP1002

Amounts are **Exclusive of Tax**

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	SALES TAX
1		Show: PO:HG				
2		Ref: MYTEST00099				
3						
4	MSR100	8" Powered Speaker - Yamaha MSR100	2	5	10.00	HST ON
5	NBM1-1	1 Foot RapcoHorizon NBM1 XLR to XLR Audio Patch Ca	2	0	0.00	HST ON
6						Subtotal: \$10.00
7						

Buttons: Add lines, Clear all lines, Add subtotal

Message on invoice:

Message on statement:

Discount value: 2, HST (ON) @ 13% on 9.04: 1.04

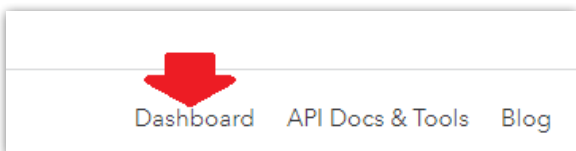
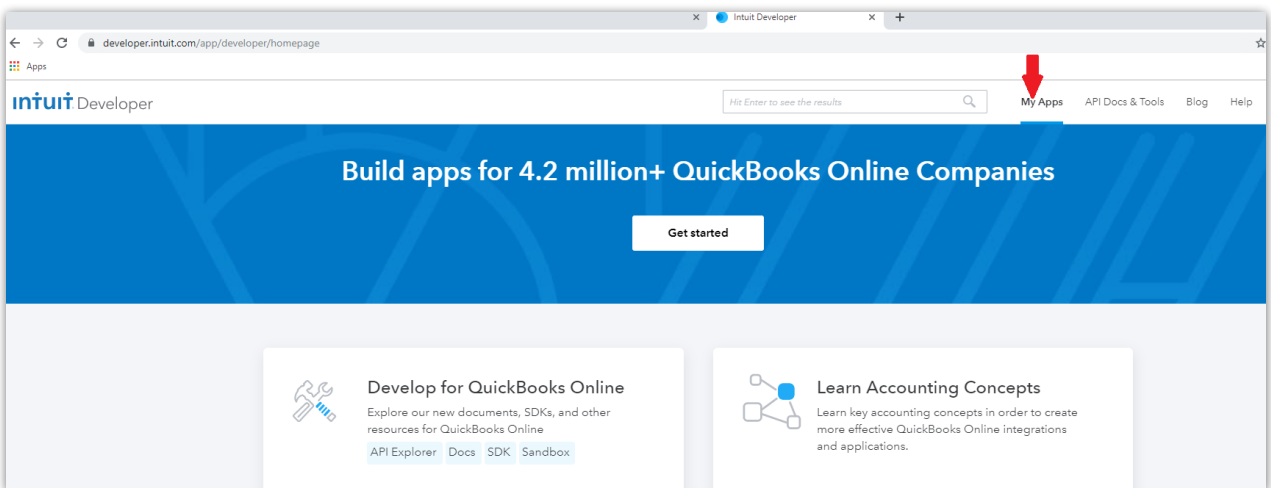
Subtotal: \$10.00, Total: \$9.04, Balance due: \$9.04

# Configure Quickbooks Online for Integration with RentalPoint

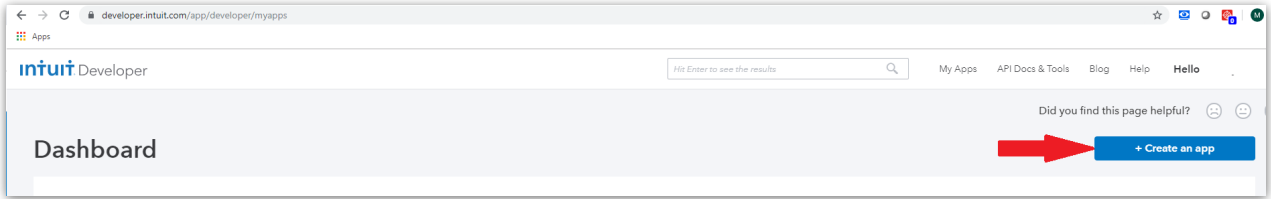
<https://developer.intuit.com/app/developer/homepage>

## General

On the developer homepage, click 'My Apps', or 'Dashboard' if 'My Apps' isn't an option



then 'Create New App'



# Create app

Select the platform you want to develop for



## QuickBooks Online and Payments

APIs include time tracking, job costing, inventory management, process credit card payment and other business needs.



## QBMS Legacy

Legacy QBMS Apps

# QuickBooks Online and Payments

## Give your app a name

Keep the name length within 80 characters. Names exceeding this length are truncated when displayed.

What's your app name?

## Select a scope ?

Select the scope for the APIs you would like to access (Don't worry, you can increment scopes later)

[Back](#)[Create app](#)

Or US version

QuickBooks x Create App x +

developer.intuit.com/app/developer/app-create

Apps

intuit Developer Search

### Give your app a name

Keep the name length within 80 characters. Names exceeding this length are truncated when displayed.

What's your app name?

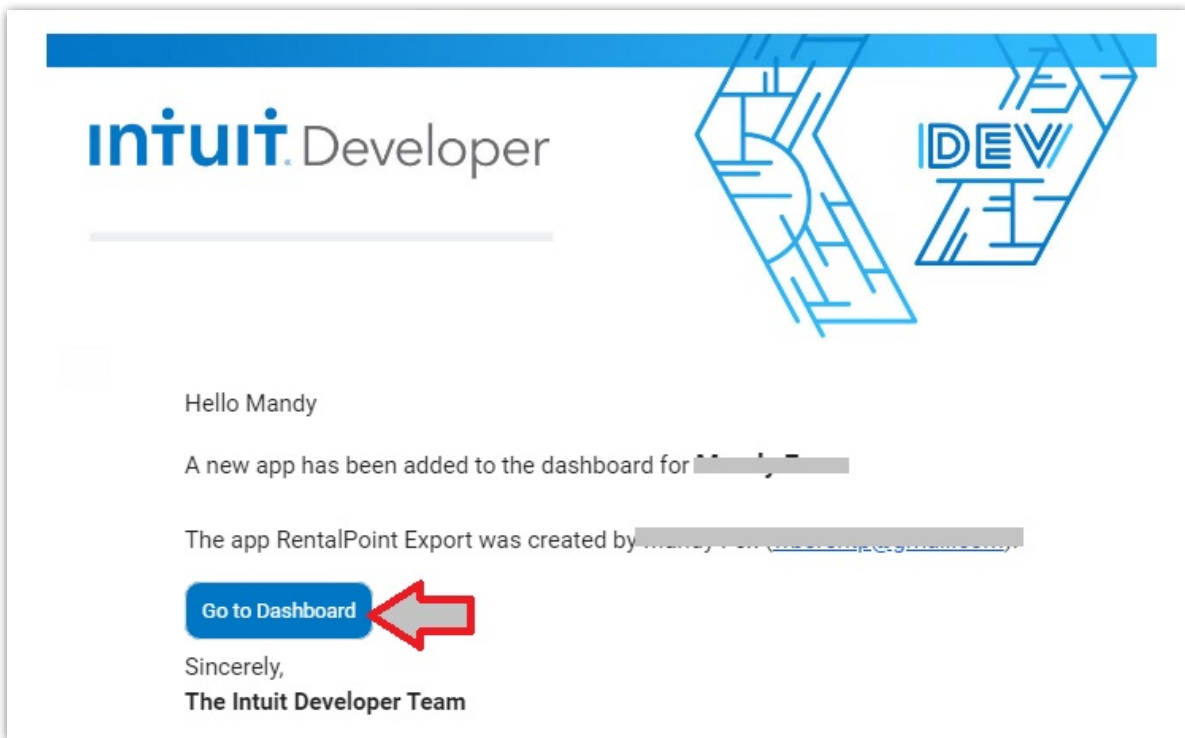
### Select a scope ?

Select scopes for the APIs you would like to access. Scopes may be added as needed. Scopes cannot be removed once assigned to an app.

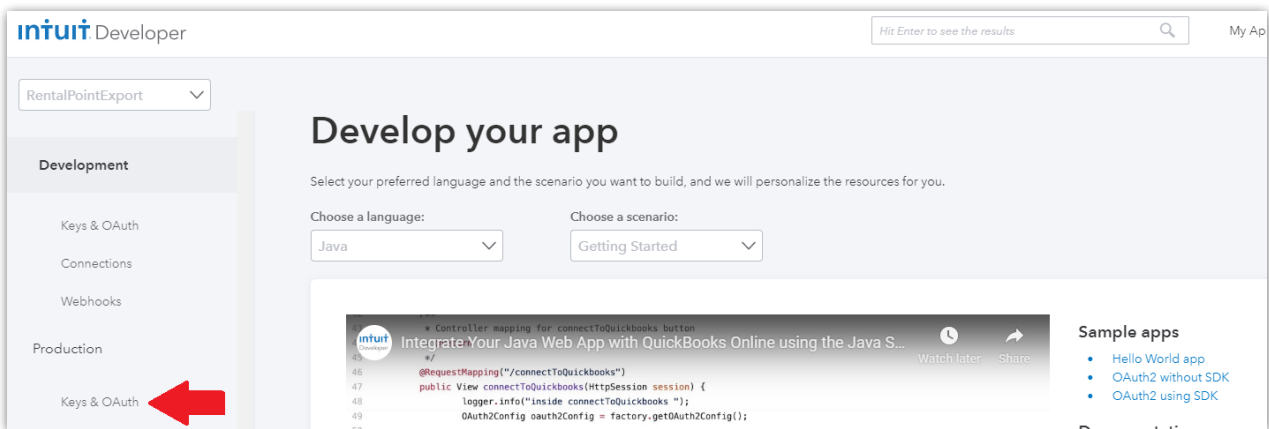
- com.intuit.quickbooks.accounting
- com.intuit.quickbooks.payment ( US only )

[Back](#) [Create app](#)

You'll get an email from Intuit which you need to confirm in order to complete setup. Once confirmed you'll see a checkmark beside 'Verify your email address' below



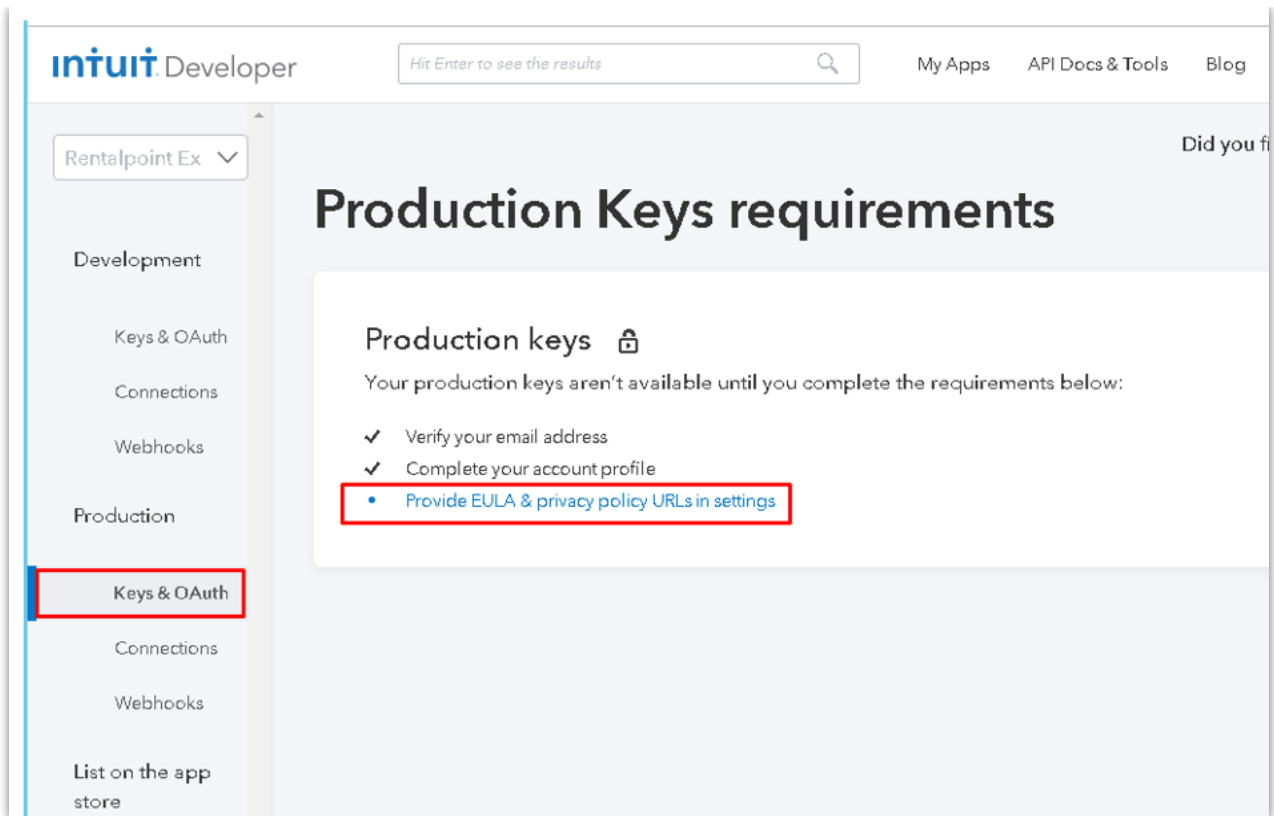
Click 'Keys & OAuth' under the Production label



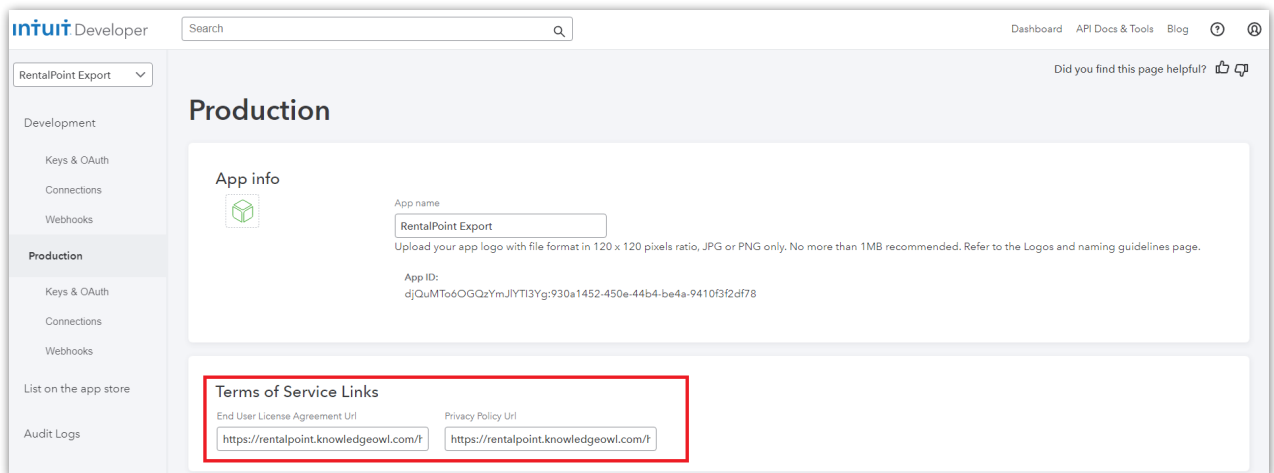
Click on 'Complete your account profile', fill in the information required, then click <---- to return to the Production Keys requirements screen illustrated below.

then click 'Provide EULA & privacy policy URLs in settings

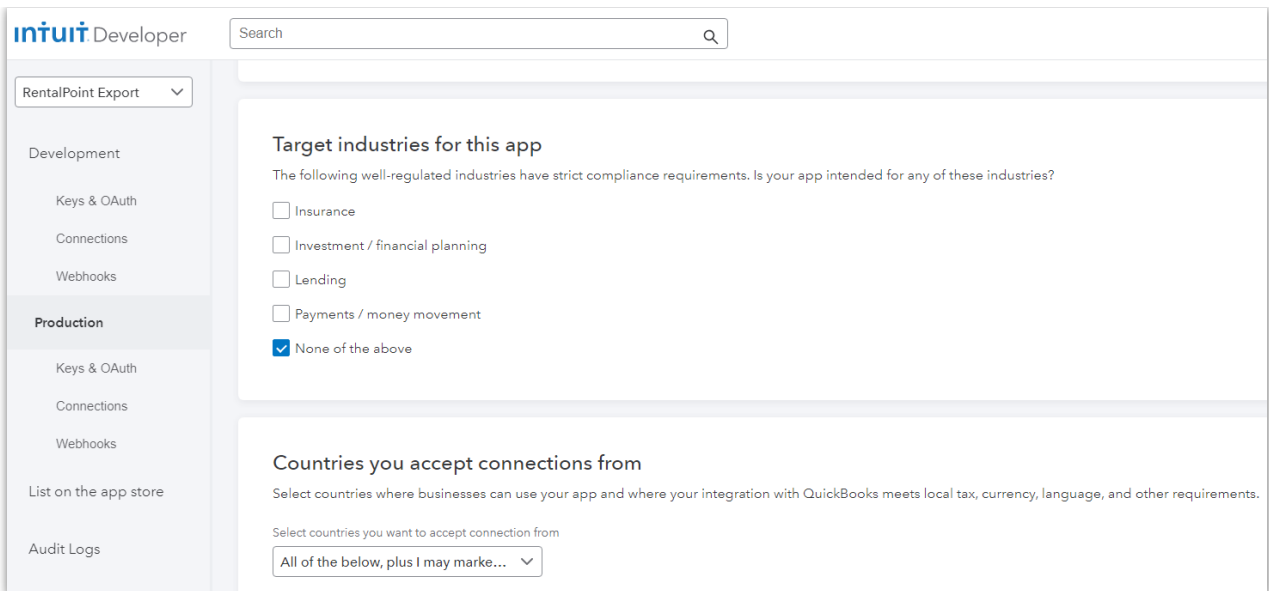




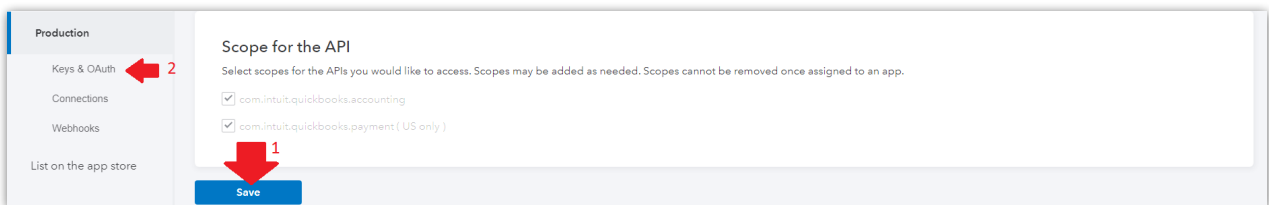
Enter link to terms of service and privacy policy for your company. You need to enter something here in order to complete setup. If you don't have a terms link, just copy/paste the link for this document into both fields.



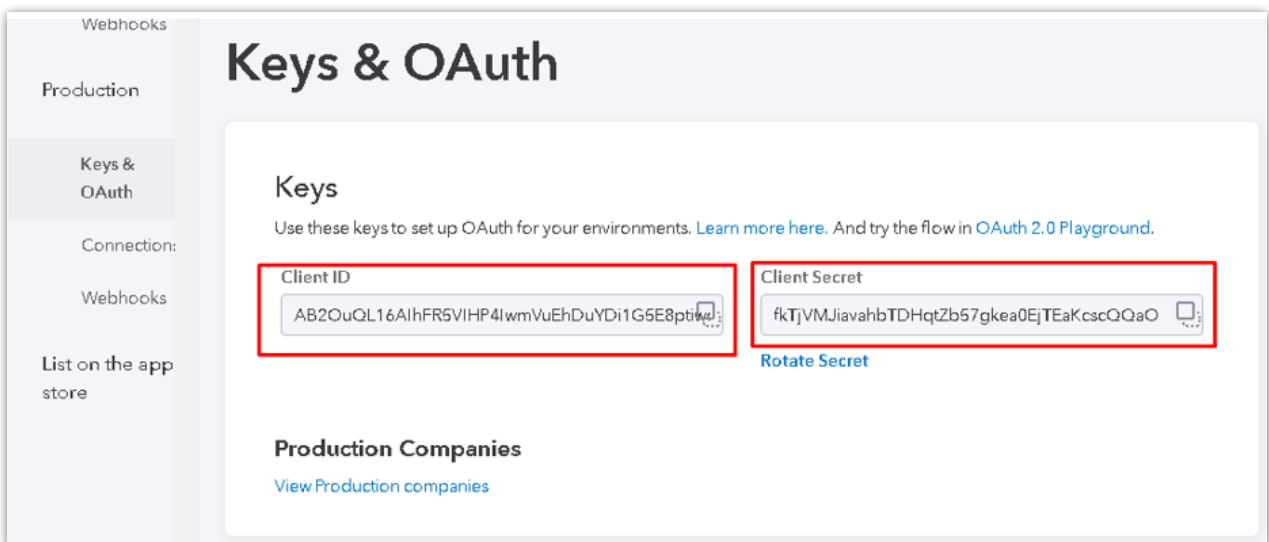
then answer the Target Industries questions



Click save to commit your changes, then click Keys & Auth to return to the previous screen

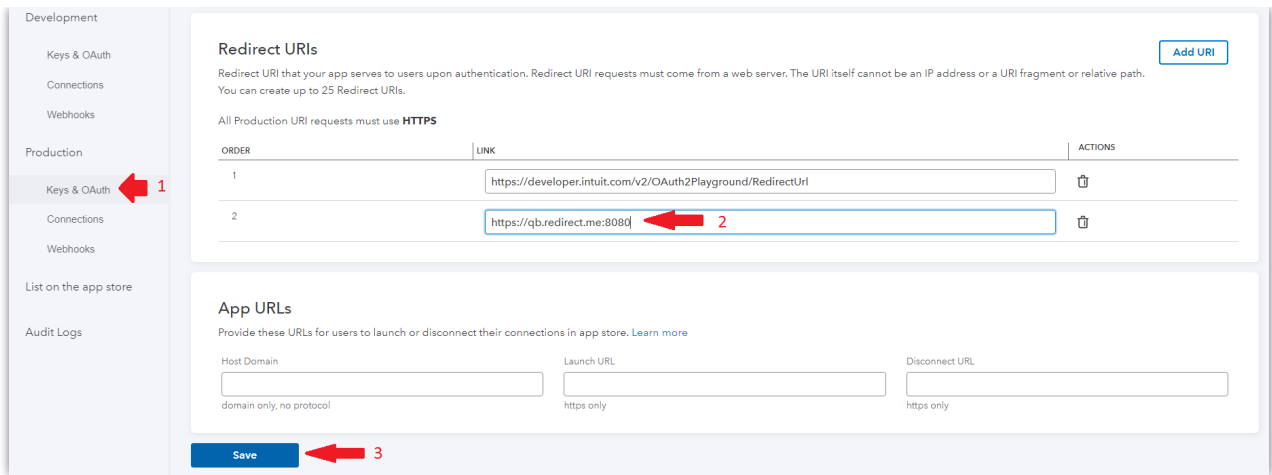


Scroll to the top of the screen to see your Client ID and Client Secret. You'll need to copy/paste these into RentalPoint Parameters once you've completed your Quickbooks setup, so either keep the page marked OR copy/paste them to a notepad file for easy access later.



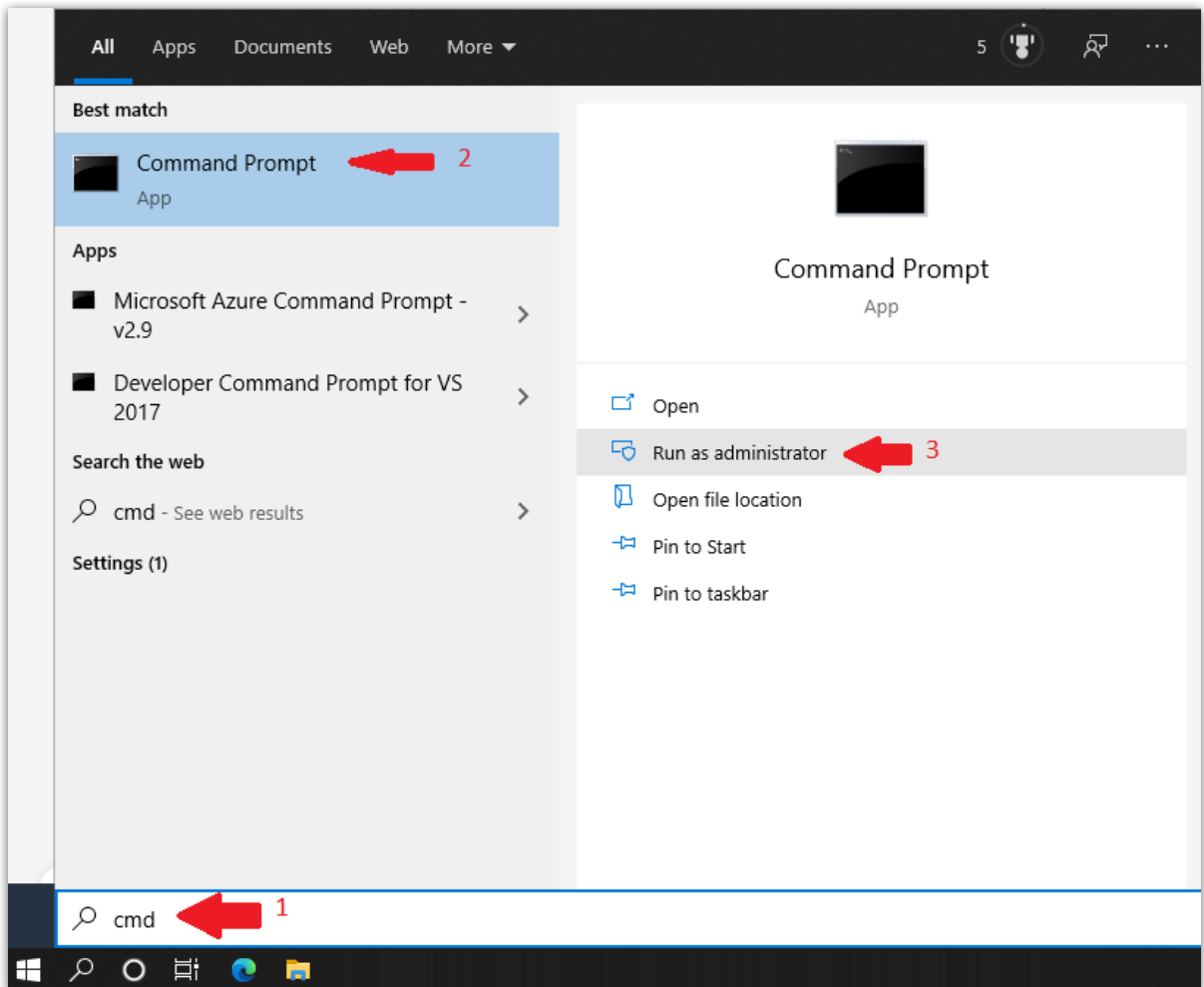
## Configure Re-direct URL

On the bottom of the same screen (Production Keys & OAuth) for the app you just created, copy/paste to the redirect urls



Then add [qb.redirect.me](https://qb.redirect.me) into your system hosts file *on the workstation you will export from* (you may do this on many workstations if needed)

1. Open an elevated command prompt



2. Then type **notepad C:\Windows\System32\drivers\etc\hosts**

```
Administrator: Command Prompt
Microsoft Windows [Version 10.0.19041.508]
(c) 2020 Microsoft Corporation. All rights reserved.

C:\WINDOWS\system32>notepad c:\windows\system32\drivers\etc\hosts
```

3. Copy/Paste or type this line into the file **127.0.0.1 qb.redirect.me**

```
hosts - Notepad
File Edit Format View Help
# Copyright (c) 1993-2009 Microsoft Corp.
#
# This is a sample HOSTS file used by Microsoft TCP/IP for Windows.
#
# This file contains the mappings of IP addresses to host names. Each
# entry should be kept on an individual line. The IP address should
# be placed in the first column followed by the corresponding host name.
# The IP address and the host name should be separated by at least one
# space.
#
# Additionally, comments (such as these) may be inserted on individual
# lines or following the machine name denoted by a '#' symbol.
#
# For example:
#
#       102.54.94.97       rhino.acme.com           # source server
#       38.25.63.10      x.acme.com                # x client host

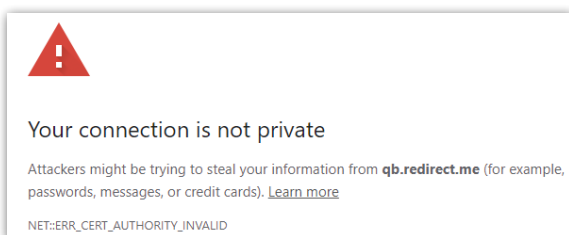
# localhost name resolution is handled within DNS itself.
#       127.0.0.1        localhost
#       ::1              localhost

127.0.0.1 qb.redirect.me
```

4. Save and exit the file <Ctrl S>

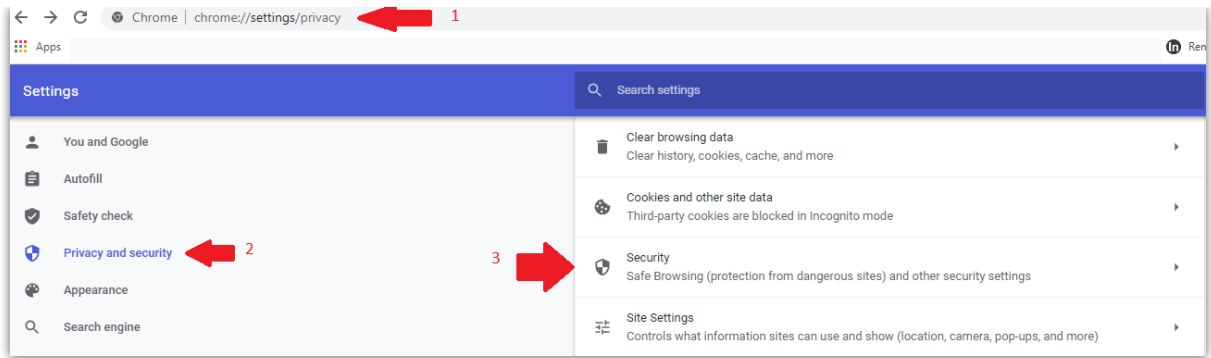
## Add Security Certificate to Google

A security certificate has been provided as part of your RentalPoint Software installation. To avoid the message below, you'll need to install the security certificate with your Google Chrome browser settings.

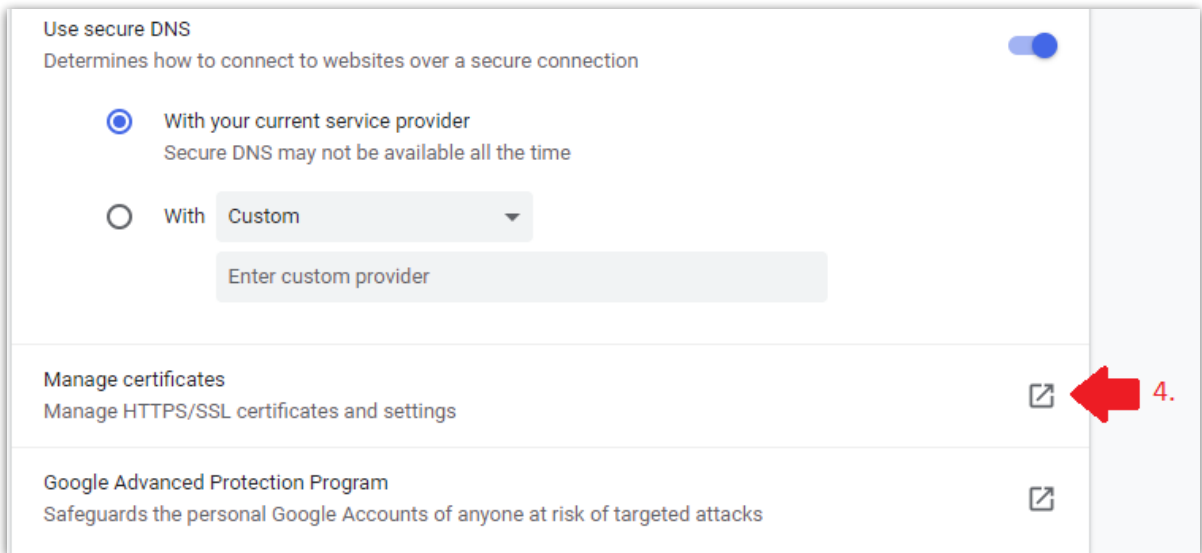


### Using Google Chrome

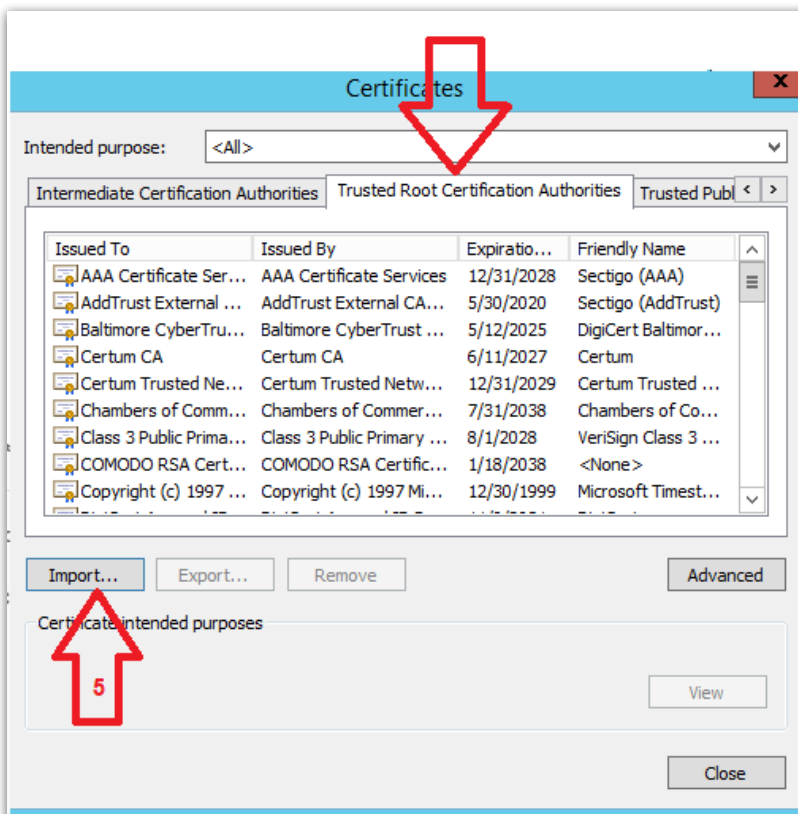
1. open a webpage to chrome://settings
2. then click Privacy & Security
3. next click Security (Safe Browsing....)



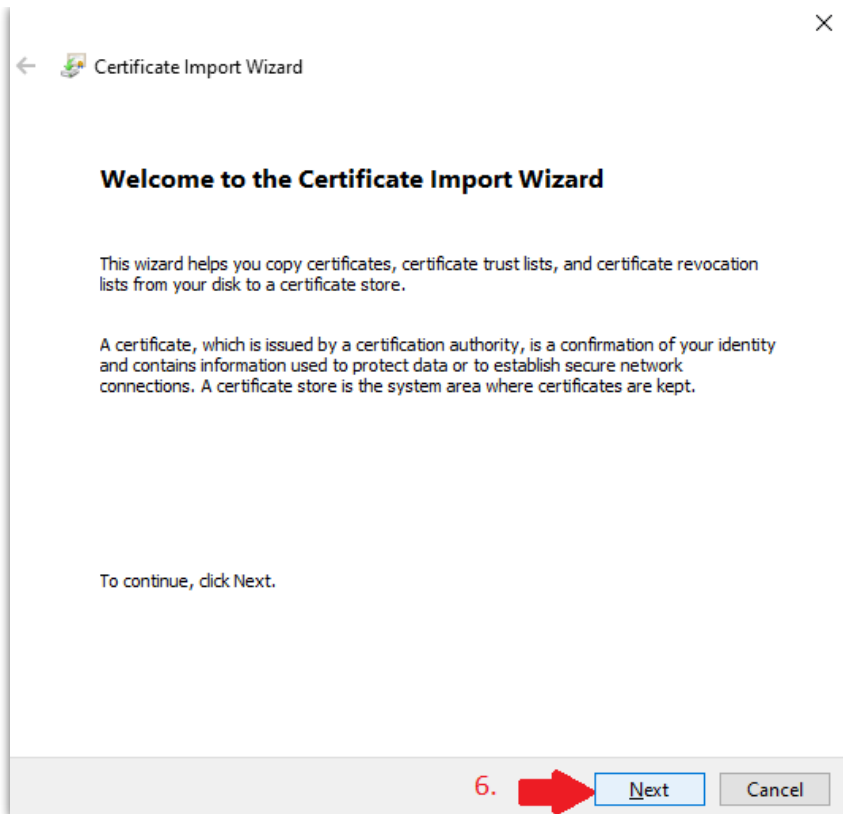
4. Scroll down to Manage Certificates and click the icon to access



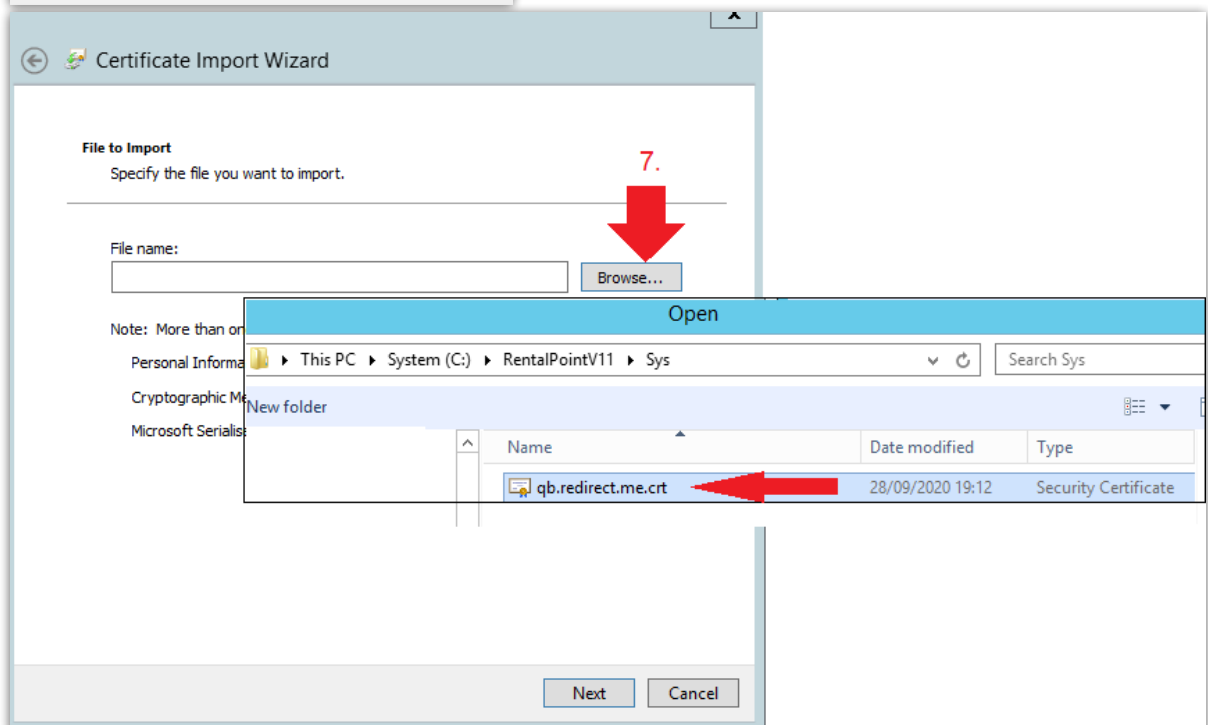
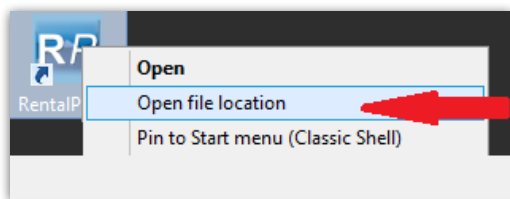
5. Intermediate Certification Authorities, then Click IMPORT



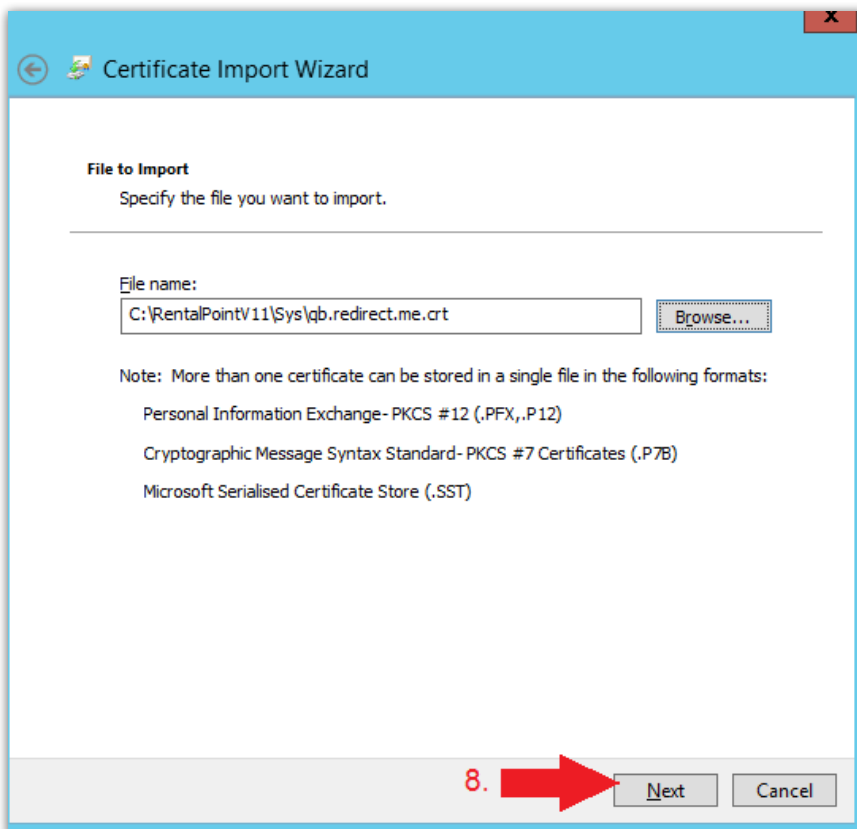
6. Click NEXT to use the import wizard



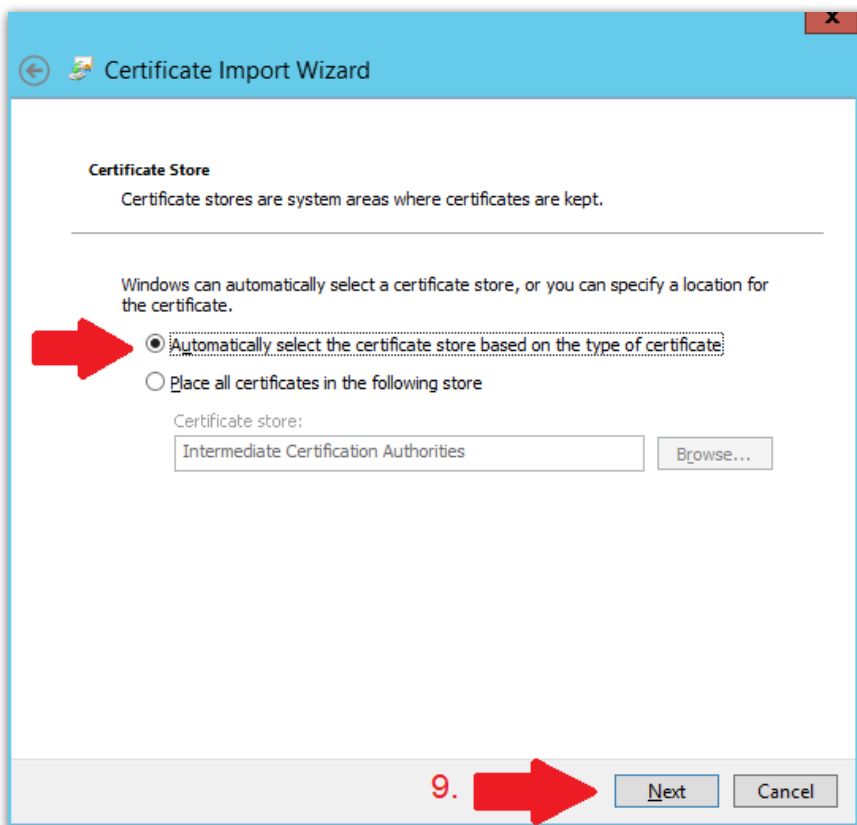
7. Locate the file `qb.redirect.me.crt` in your `RentalPoint\sys` folder (If you're not sure where this is, right click on the icon you use to run RentalPoint and click 'open file location' to find out where RentalPoint was installed on your device.)



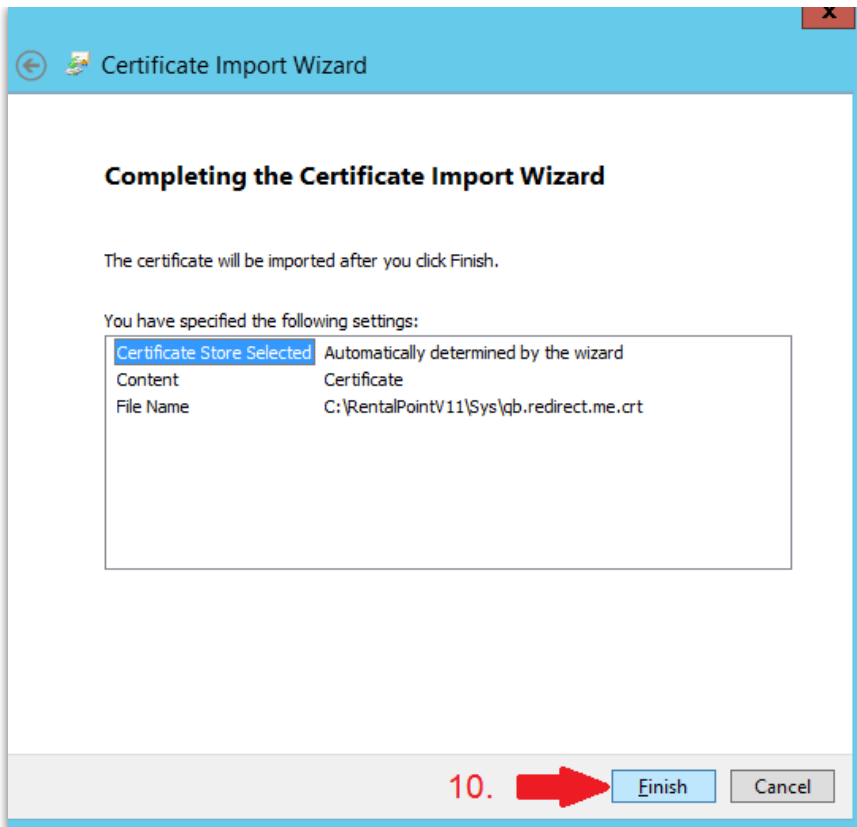
- 8.



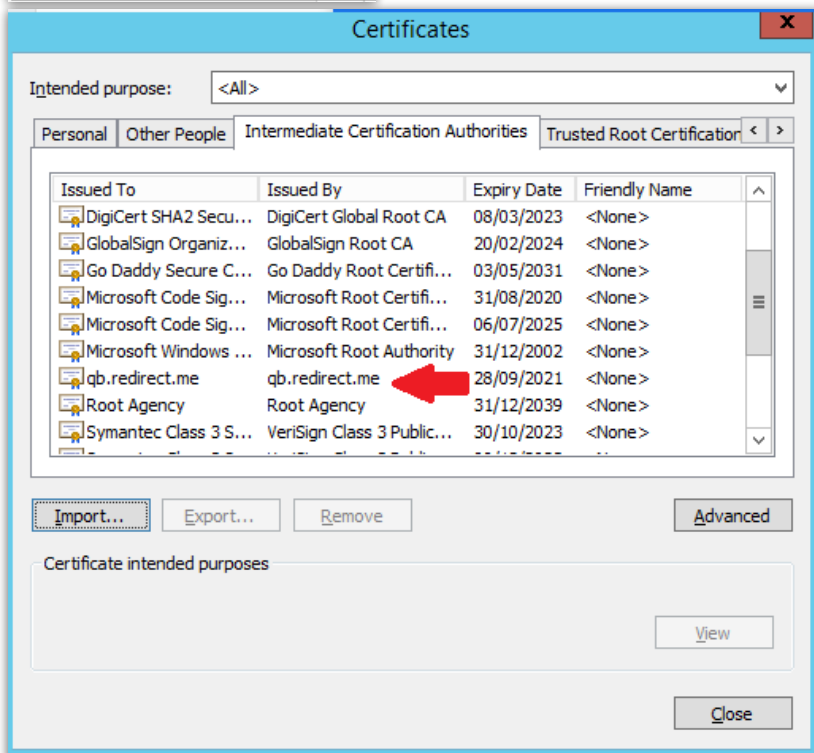
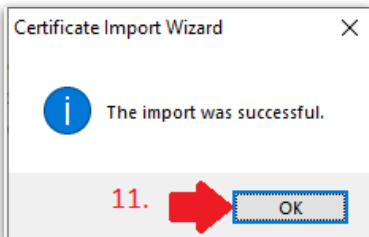
9.



10.



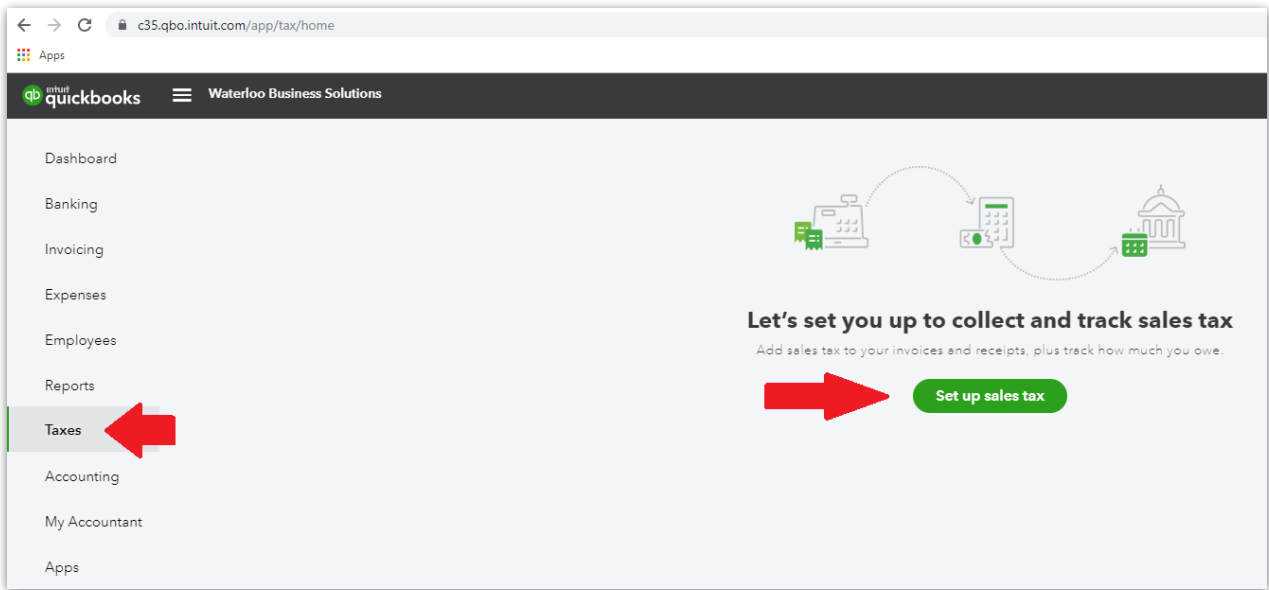
11.



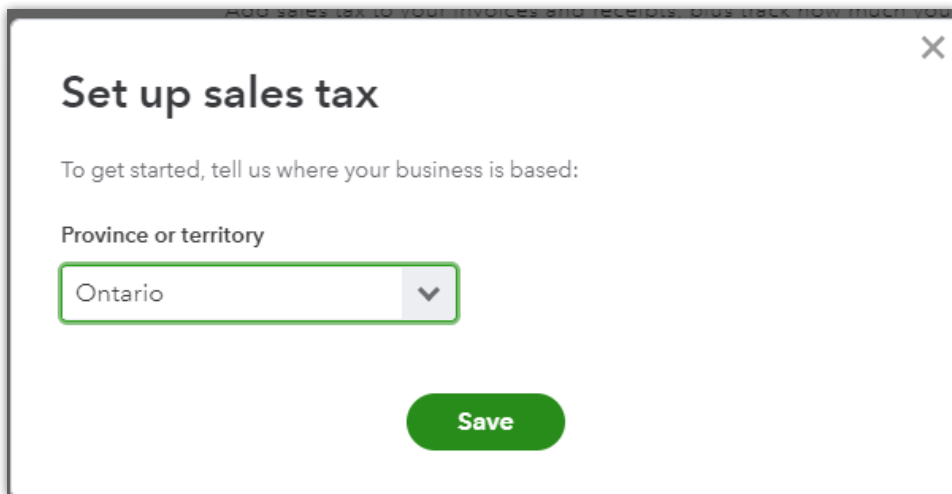


# Setup Quickbooks Taxes for RentalPoint Export

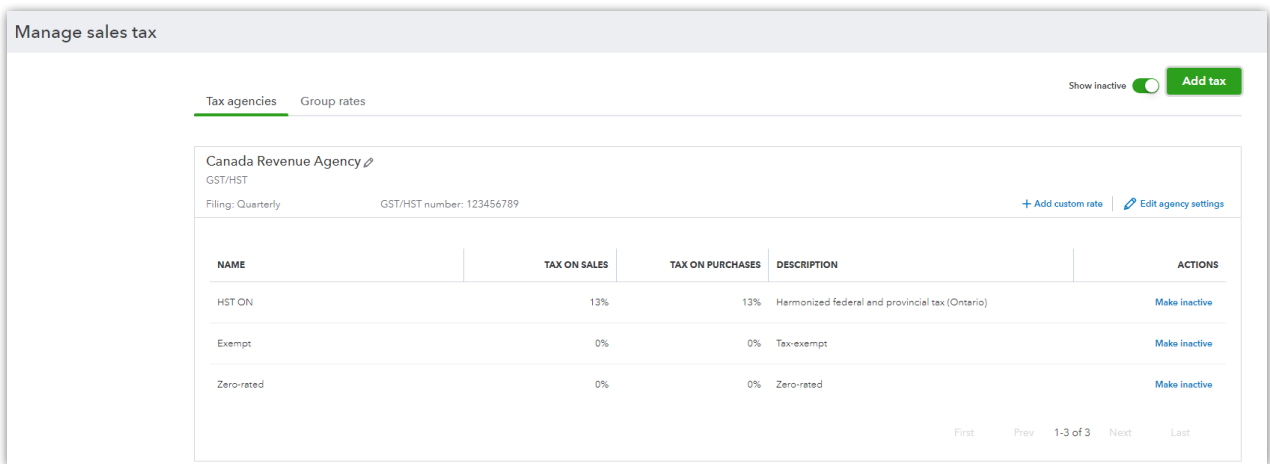
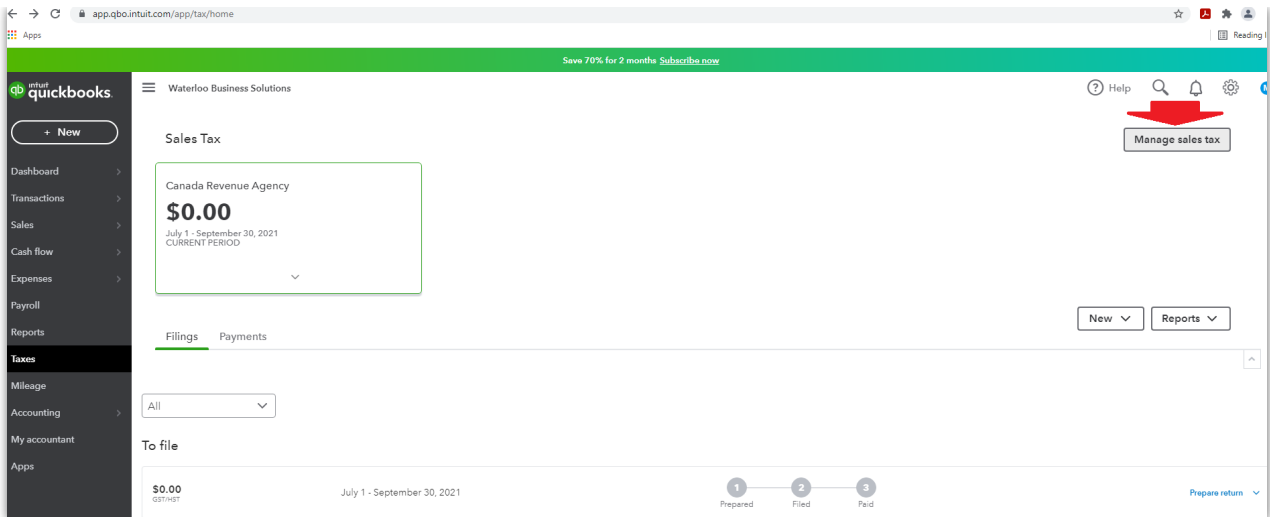
1. Login to Quick Books, Add tax for Rentalpoint export



For example, choose Ontario & Quickbooks will automatically set up the relevant taxes



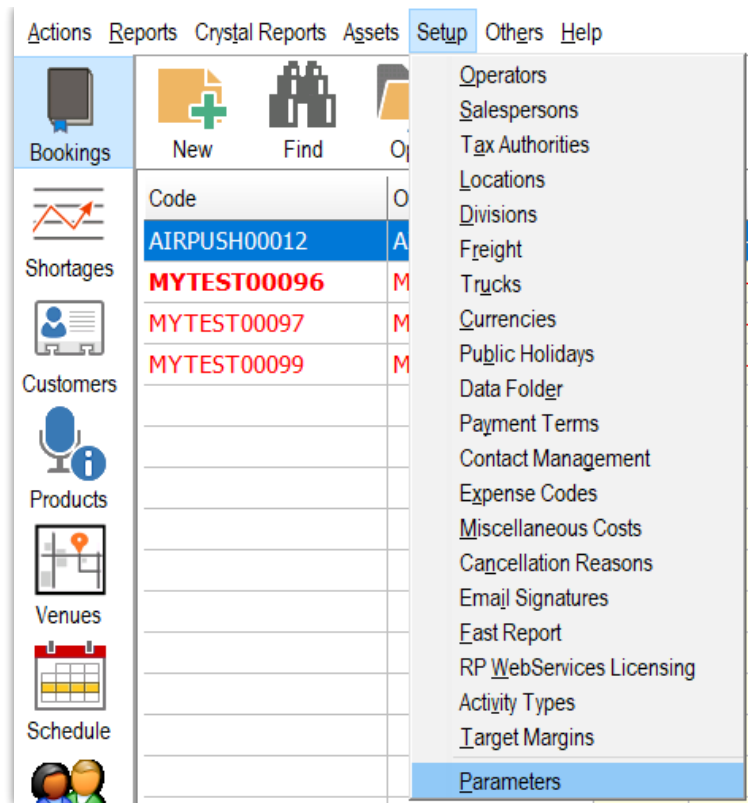
Relevant sales tax has been automatically set up, click Manage Sales Tax to see it....



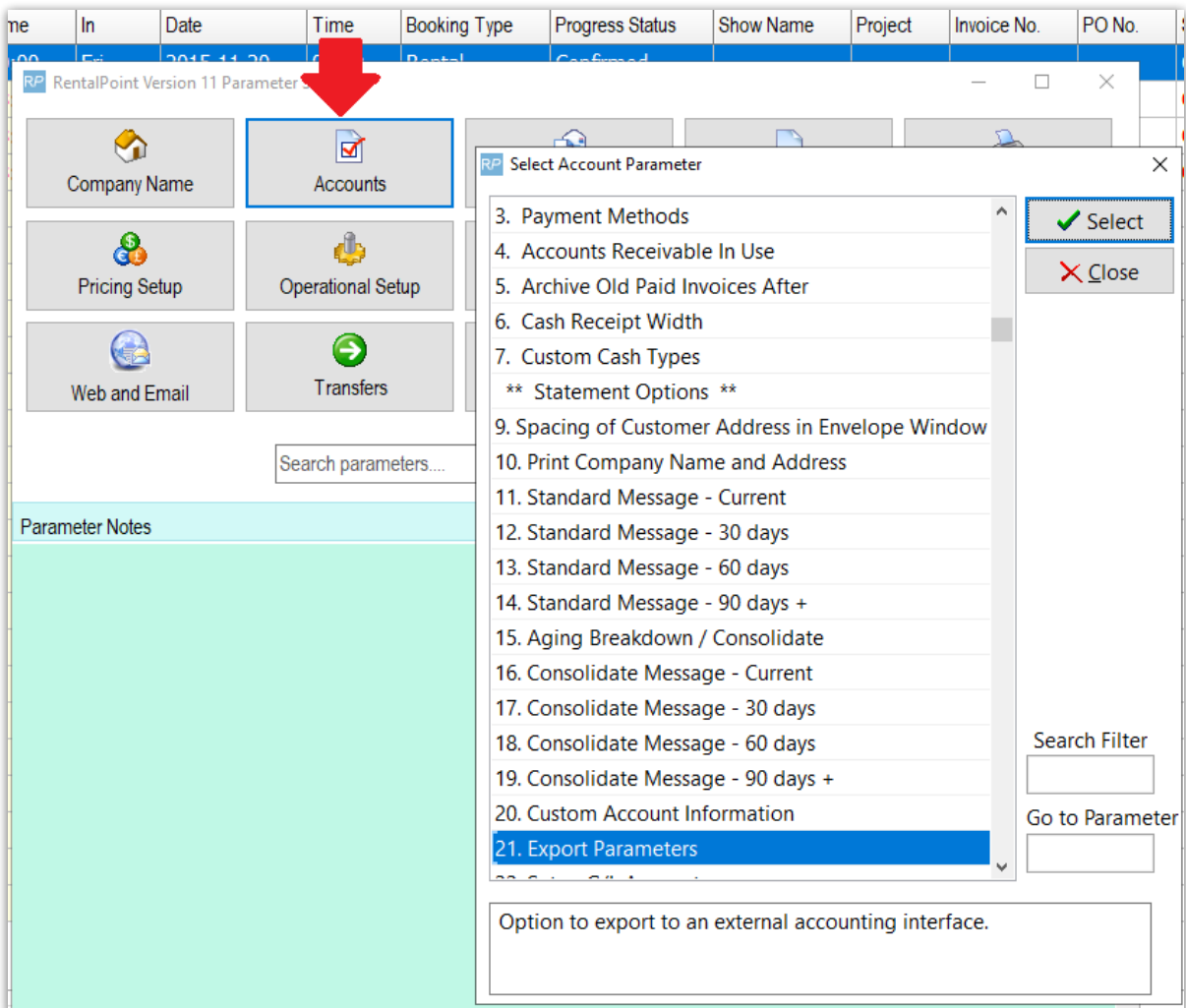
## Configure RentalPoint for Integration with Quickbooks Online

Once Quickbooks Online is configured for integration with third party software, proceed to setting up parameters below. If you skipped this step, see detailed instructions on how to configure Quickbooks Online in the section above.

1. Goto Setup-->Parameters--> Account Parameters 21 "Export Parameters"

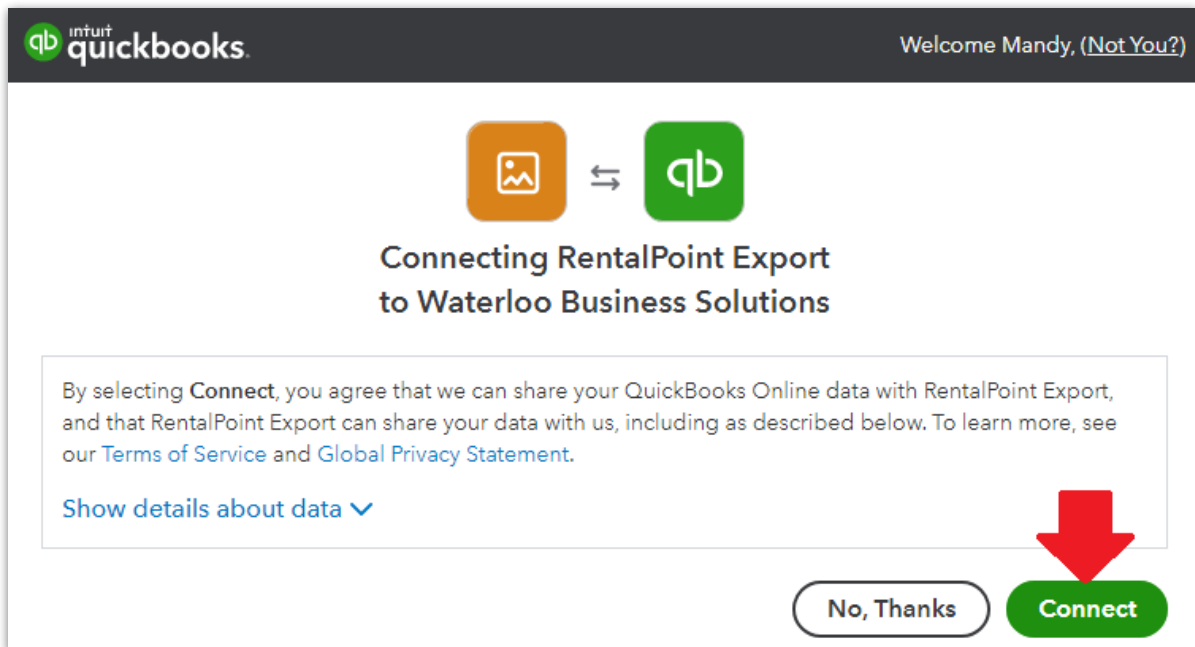


2.



Select "Quick Books Online"

1. Fill in "QB Production ID" using Client ID from Keys & OAuth setup above
2. Fill in "QB Production Secret" using Client Secret from Keys & OAuth setup above
3. Set the Company Format
4. Click Get Tax List and follow OAuth Web login instructions

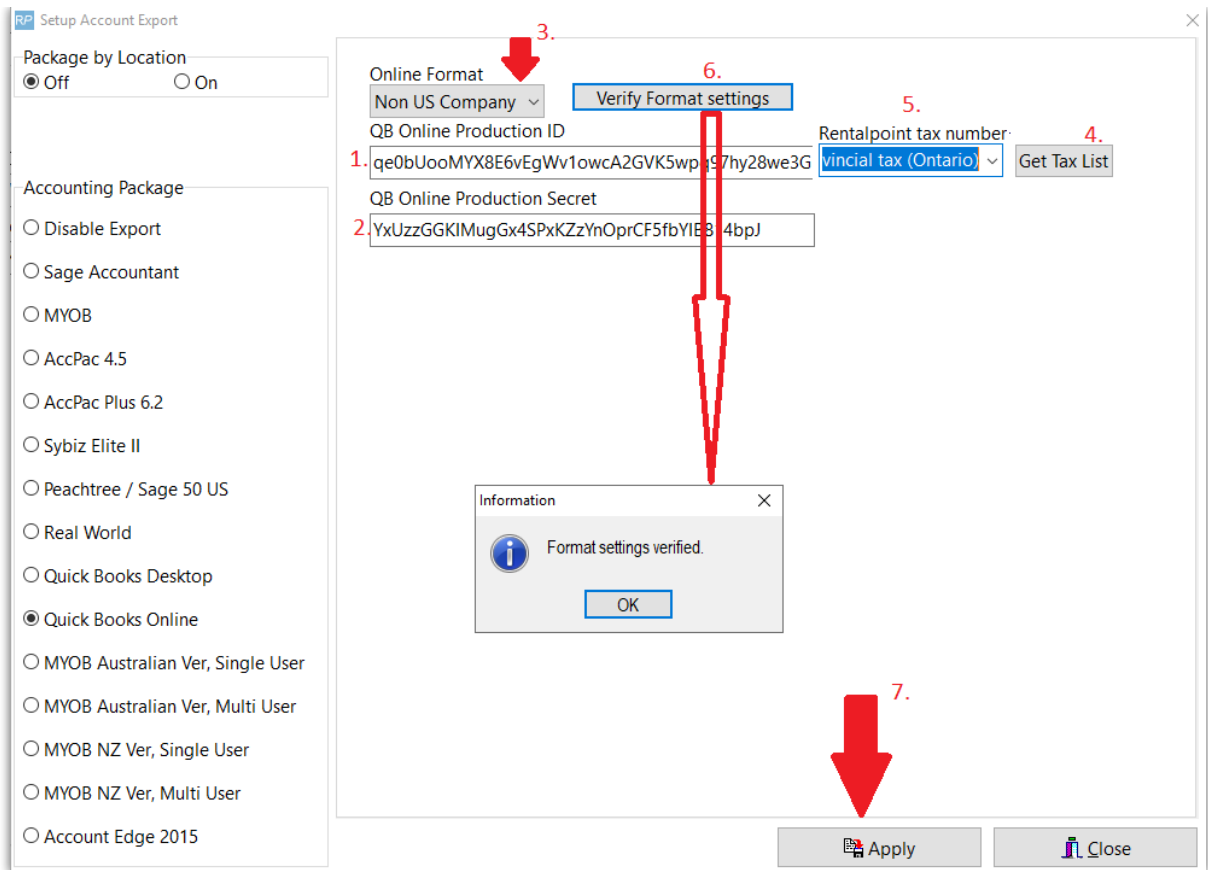


5. Once logged in, you can choose your RentalPoint Tax number from the drop down list provided for your region
  - o When logged in, you may get a blank Google screen which is ok. Go back to your RentalPoint screen and see if you can now click the drop down for RentalPoint tax number.
  - o USA Users: Choose the taxes from your home state here. If you collect taxes from many states, you'll need to set those taxes up in Quickbooks Online too, so that 'out of state' taxes will be properly identified when imported from RentalPoint. Unidentified taxes will still be imported, however, you'll need to edit the invoice post import and identify the tax location for reporting purposes as needed. Consider running a test invoice for each state that you do business with to ensure your taxes are recorded properly.

6. Verify Format Settings

7. Click Apply

-



## RentalPoint Operator Privilege Needed

'Can Use Quickbooks Online Integration' must be checked in users operator privileges in order to have the ability to Export Accounts to QuickBooks Online. Goto Setup-->Operators to grant the privilege or see your System Administrator for access

RP Edit Group Record : ADMINISTRATOR

Group Name Bookings Sub rentals and Transfers Customers and Vendors Products and PO's Checkout, Return and Maintenance  
Reports Printing Options Setup and Utilities Contact Management Access Other Crew and Activities Booking Scope

Setup

- Set up Payment Terms
- Set up Salespersons
- Set up Freight
- Set up Trucks
- Set up Rooms
- Set up Tax Authorities
- Set up Divisions
- Set up Currencies
- Change Setup Parameters
- Reset Parameters
- Can Remove Parameter Setup Lock
- Set up Locations
- Can Disable Login Access
- Edit Operator Access Privileges (this)
- Set up Expense Codes
- Set up Miscellaneous Costs
- Set up Cancellation Reasons
- Setup Activities
- Setup Multi Location Operator Groups
- Set up Target Margins
- Set asset stop date

Utilities

- Format Phone Numbers
- Re-load Stored Procedures
- Account Export
- Import Account Balances
- Can Upgrade Data Files
- Display Log Files
- Import Files
- Product Setup Utilities
- Can Change Attachments Document Path
- Archive Old Data (Bookings, Documents, POs)
- Unarchive Bookings
- Purge Old Data (Bookings, Customers, Products)
- Can Use Excel Query Builder
- Can Use Quickbooks Online Integration**

Locking

- Can Create Admin Lock
- Can Remove Admin Lock
- Can Unlock a Booking (while being modified)
- Can Lock/Unlock Booking for Scanning in Checkout
- Can Lock/Unlock Sub rental for Scanning in Checkout

Log in

- Can Change Password
- Can Change Operator Defaults

All Clear All All In Tab Clear All In Tab Find OK Cancel