

GoldBook links GoldMine with QuickBooks accounting. Eliminate double entry and updates of contacts and provide GoldMine users with visibility QuickBooks transactions.

Add GoldMine contact to QuickBooks

GoldMine contacts can be quickly added to QuickBooks as either a customer or a vendor. Existing QuickBooks customers or vendors can be linked to GoldMine contacts. GoldBooks will highlight any differences in the GoldMine and QuickBooks records and allow the user to quickly update one application with the updated contact information from the other application.



Identify and Update Contact Information Changes

GoldBook will display the current GoldMine records contact information side by side with the QuickBooks contact information and highlight any differences. Users can quickly update either contact with the most current information.

View QuickBooks Transaction Register

GoldBook will read the current transaction register for a GoldMine contact allowing a user to see the QuickBooks detailed transactions history of invoices, payments and credits. Each document will display with relevant line item details.

Copy QuickBooks documents to the clipboard

Users can choose to copy the whole transaction registry or individual documents such as invoices to the clipboard for easy pasting into an email. This allows the user to send a customer or vendor a statement or detail of their recent transactions.



Quickly identify and update differences between GoldMine and QuickBooks contact records

Synchronize QuickBooks Invoices to GoldMine

GoldBook will synchronize QuickBooks invoices to GoldMine as completed sales with detail line item descriptions and payment status.

Synchronize QuickBooks Sales Orders to GoldMine

GoldBook will synchronize QuickBooks sales orders to GoldMine as either forecasted sales completed sales with detail line item descriptions.

Synchronize QuickBooks Estimates to GoldMine

GoldBook will synchronize QuickBooks Estimates to GoldMine as forecasted sales with detail line item descriptions.

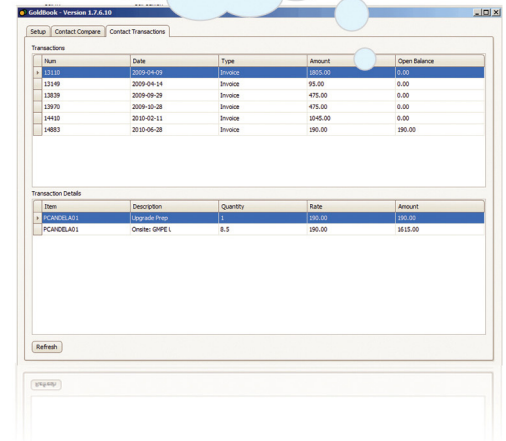
Synchronize QuickBooks Accounts Receivable Balances to GoldMine

GoldBook will synchronize QuickBooks unpaid customer balances to GoldMine numeric fields representing current invoices as well as 30, 60, 90 or older values.

Synchronize Individual contacts or all contacts

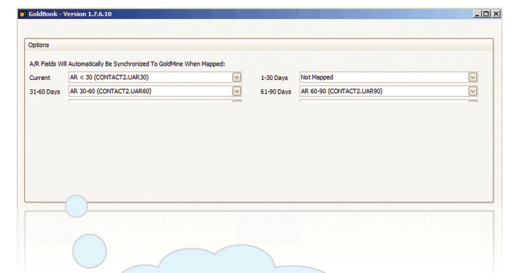
GoldBook will synchronize transactions for any individual contact or perform a batch update of all linked contacts.

View GoldMine contacts QuickBooks transaction register



Num	Date	Type	Amount	Open Balance
13319	2009-09-14	Invoice	95.00	0.00
13329	2009-09-29	Invoice	475.00	0.00
13970	2009-10-28	Invoice	475.00	0.00
14418	2010-02-11	Invoice	245.00	0.00
14883	2010-06-28	Invoice	190.00	190.00

Item	Description	Quantity	Rate	Amount
PCANDEL1	PCANDEL1	1	190.00	190.00
PCANDEL1	Order: 09F1	8.5	190.00	1615.00



Options

A/R Fields Will Automatically Be Synchronized To GoldMine When Mapped:

Current	AR < 30 (CONTACT2.LIAR30)	1-30 Days	Next Mapped
31-60 Days	AR 30-60 (CONTACT2.LIAR60)	61-90 Days	AR 60-90 (CONTACT2.LIAR90)

Specify which transactions to synchronize from QuickBooks to GoldMine

REQUIREMENTS

- GoldMine version 6.7 or higher, Corporate or Premium Editions
- QuickBooks 2003 or higher, any edition
- Windows XP or higher
- Microsoft .Net 2.0

QuickBooks®