

Ongoing Synchronization

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You can add or change a list record (customer, item or vendor) either within All Orders or within QuickBooks and they will be synchronized. If the record changes in All Orders, then the change in QuickBooks will generally occur in real-time. If changed within QuickBooks, then All Orders will be updated during the next synchronization; from the Main Menu click Company -> Synchronize QuickBooks -> Synch. You can also set a preference so that the synchronization occurs automatically in timed intervals.

Posting transactions created in All Orders can be recorded in QuickBooks using a Trigger. For example a ship doc will be recorded as an Invoice in QuickBooks when the Invoice button is clicked. View what information is shared with QuickBooks for a list of Triggers. There is a preference (Company -> Preferences -> QuickBooks) in which you do not have to use a 'Trigger' which we call the 'Send All' preference. To turn on this preference check 'Send all unsent transactions / payments (that are available to be send) to QuickBooks'. See synchronization options for more information on the Send All preference.

Sales Orders and purchase orders (non-posting transactions) are not recorded in QuickBooks. Rather they are processed as ship docs and receivers, respectively, and recorded in QuickBooks as invoices and bills, respectively.

Transactions created in QuickBooks will not be recorded in All Orders. Therefore, it is important to originate all inventory related transactions and allow them flow into QuickBooks.

QuickBooks will be used for accounting, checks, bill paying, receiving cash, payroll etc. Moreover, since all posting transactions will ultimately be recorded in QuickBooks, almost every report with the exception of open sales and purchase order reports, will be relevant and usable in QuickBooks.

Below is a document flow diagram of the various functions available in All Orders. It shows how the different arms of your business (sales, purchasing, warehousing, production) interact, and how the entire system interacts with QuickBooks. The green box is QuickBooks and the white area around it is All Orders. Note how sales orders, work orders and purchase orders are processed through All Orders and how ship docs, receivers and work orders are ultimately recorded in QuickBooks.

