

QuickBooks Integration Assessment



QuickBooks Online

- ☐ Lite
- ☐ Essentials
- ☐ Plus
- ☐ Advanced

QuickBooks Desktop

- ☐ Desktop
- ☐ Enterprise

App Name _____

Native QuickBooks Reports Still Work?

- | | | | |
|-----------------------------|--------------------------|----------------------------------|--------------------------|
| Balance Sheet | ☐ | Open Invoices | ☐ |
| Customer Balance Summary | ☐ | Profit & Loss | ☐ |
| Invoice by Customer Summary | ☐ | Sales by Product/Service Summary | ☐ |
| Vendor Balance Summary | ☐ | | |

Data Types

	1 Time Sync	Continual Sync	From Lexul App to QuickBooks	From QuickBooks to Lexul App	
Accounts	☐	☐	☐	☐	_____
Assemblies	☐	☐	☐	☐	_____
Bills	☐	☐	☐	☐	_____
Classes	☐	☐	☐	☐	_____
Customers	☐	☐	☐	☐	_____
Employees	☐	☐	☐	☐	_____
Estimates	☐	☐	☐	☐	_____
Item Groups	☐	☐	☐	☐	_____
Inventory	☐	☐	☐	☐	_____
Items	☐	☐	☐	☐	_____

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	1 Time Sync	Continual Sync	From Lexul App to QuickBooks	From QuickBooks to Lexul App	
Accounts	☐	☒	☐	☒	_____
Assemblies	☐	☒	☐	☐	_____
Bills	☐	☒	☒	☐	_____
Classes	☐	☒	☐	☒	_____
Customers	☐	☒	☒	☒	_____
Employees	☐	☒	☐	☒	_____
Estimates	☐	☐	☐	☐	Use custom estimates that do not sync to QuickBooks for greater functionality.
Item Groups	☐	☒	☐	☐	Support native inventory reductions through invoicing or can use Lexul's custom inventory solution.
Inventory	☐	☒	☒	☐	_____
Items	☐	☒	☐	☒	_____

	1 Time Sync	Continual Sync	From Lexul App to QuickBooks	From QuickBooks to Lexul App	
Jobs (Sub-Customers)	☐	☐	☐	☐	_____
Journal Entries	☐	☐	☐	☐	_____
Payments	☐	☐	☐	☐	_____
Projects	☐	☐	☐	☐	_____
Purchase Orders	☐	☐	☐	☐	_____
Time Activities	☐	☐	☐	☐	_____
Time Types	☐	☐	☐	☐	_____
Units of Measure	☐	☐	☐	☐	_____
Vendors	☐	☐	☐	☐	_____

	1 Time Sync	Continual Sync	From Lexul App to QuickBooks	From QuickBooks to Lexul App	
Jobs (Sub-Customers)	☐	☒	☒	☒	_____
Journal Entries	☐	☒	☒	☐	We write journal entries to QuickBooks for our inventory system. _____
Payments	☐	☐	☐	☐	Invoices are sent to QuickBooks so customers can pay using methods integrated with QuickBooks. _____
Projects	☐	☐	☐	☐	coming soon... _____
Purchase Orders	☐	☒	☐	☒	_____
Time Activities	☐	☒	☒	☐	_____
Time Types	☐	☒	☐	☒	_____
Units of Measure	☐	☒	☐	☒	UofM are pulled from QuickBooks and included on invoices sent back to QuickBooks. _____
Vendors	☐	☒	☐	☒	_____

*Updated October 2025

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