

Sync Checklist



Ensure LabStar client names exactly match QuickBooks client names

If the names don't match an entirely new client will be created in QuickBooks when it's synced with LabStar. To avoid this compare clients lists to confirm all names exactly match.



Confirm LabStar sync start date and send starting balances

Provide your client balances as of the day before you start creating invoices in LabStar. For example, if your "start date" is June 1st, close out your month and provide the balances on May 31st. As soon as we upload the balances you can start entering payments into LabStar.



After the start date, DO NOT enter payments or edit invoices in QuickBooks

The first sync will not be successful if you've entered payments or created/edited client invoices in QuickBooks after the LabStar start date. Schedule your "first sync" training as early as possible so you can start syncing sooner and keep your QuickBooks up to date.



Schedule LabStar "first sync" training

For QuickBooks Desktop:

We'll help you upload the sync tool to your computer and successfully complete the first sync.

For QuickBooks Online:

We'll help you successfully complete your first sync.

As soon as the first sync is completed you'll be able to sync whenever you want—hourly, daily, weekly, monthly...it's up to you.



Troubleshooting

The majority of sync troubleshooting relates to either:

- 1) client names don't match, or
- 2) payments/invoices have been entered directly into QuickBooks after the LabStar "start date".

Since the balances won't match we'll know right away where to troubleshoot and we'll immediately reschedule the LabStar "first sync" training to give you time to fix the issue. Remember, after your first sync you can look forward to plenty of saved time and efficiency in your billing!

