QuickBooks Online (QBO)
Integration: Contact, Product & Invoice Sync

This article applies to:

Pro-Tips!

* Contacts and Products will be imported from QBO into Keap. **Note: Only new invoices moving forward will be added from QBO to Keap, the sync is not retroactive.**

* Imported contacts are non-marketable by default and will need to be **manually opted-in** to receive marketing emails or **sent a confirmation email**

* Products and contacts are only synced from Keap to QBO when a Keap invoice is "sent" or "paid"

* Invoices are only synced from QBO to Keap when the invoice is "paid"

* Fields that are included in the sync:
  * First Name
  * Middle Name
  * Family (Last) Name
  * Primary Email
  * Phone Number
  * Billing Address

* As soon as you have successfully connected your QBO account to Keap, Keap will import all the content and create new or update existing contacts based on unique email address. A misspelled email address will result in a separate contact record being created.

* To disconnect Keap from your QBO account, follow these instructions provided by QuickBooks

Seamlessly sync your products, contacts and invoices from QBO. No more manual data entry necessary. All you have to do is connect your QBO and Keap accounts and it only takes a few seconds.

1. Click **Settings** in the drop-down menu at the top right of the page
2. Scroll down and click **Integrations**

3. Click **Connect**

4. Note that you can also Resync or Disconnect an active QBO sync from this page

5. Sign in to your Intuit account
6. Click Connect

Let's connect Keap
Select Connect below to get started using Keap.

Allow Keap to view and update your QuickBooks online data.

    No, thanks

    Connect

7. Wait a few seconds and note the pop-up message at the bottom right confirming that you are connected and fully synced.
Contacts and Products will now be imported from QBO into Keap. Any invoice moving forward will be added from QBO to Keap.