* Connect to QB. ([Online](https://help.thermogrid.com/index.php/QuickBooks#QuickBooks_Online)) ([Desktop](https://help.thermogrid.com/index.php/QuickBooks#QuickBooks_Desktop))
* What date do we want to use as far as what orders sync? Under company settings you can choose a date this way any order created that you want to sync must have company setting before date of order creation date. (may need super user to complete)
* Create [Income accounts](https://help.thermogrid.com/index.php/1._Tab_Administration#QuickBooks_Settings)
* Set default income accounts to items by putting the income account name as the department.
* Sync a test order.
* [Tax Mapping](https://help.thermogrid.com/index.php/1._Tab_Administration#Tax_Settings) If a client has multiple tax rates this explains what to do.