



**WELCOME!!! WE WILL START AT 2:02PM ET (11:02AM PT)  
YOU SHOULD BE HEARING MUSIC!!!**

# **QUICKBOOKS AND BLOOMERANG: A MATCH MADE IN HEAVEN (SERIOUSLY!)**

**Get Social Use Hashtag #QBME  
Twitter: @QBMadeEasy  
@GreggBossen**

# Your Presenters



**Gregg Bossen, CPA**  
*QuickBooks Made Easy  
for Nonprofits*  
**Founder & CEO**



**Cody Lawson**  
*Bloomerang*  
**Product Manager**

# About Our Instructor

- ▶ Certified Advanced QuickBooks ProAdvisor®
- ▶ Specializes in Industry Specific Training
- ▶ Author of QuickBooks® Made Easy™ for Nonprofits
- ▶ National Trainer - seminars around the country



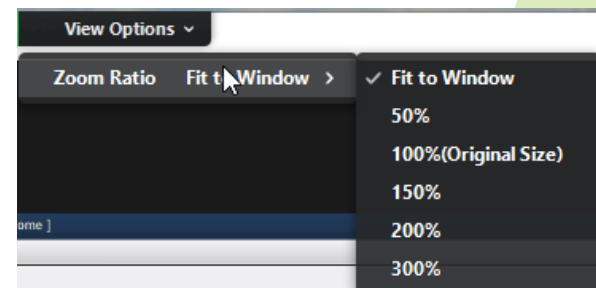
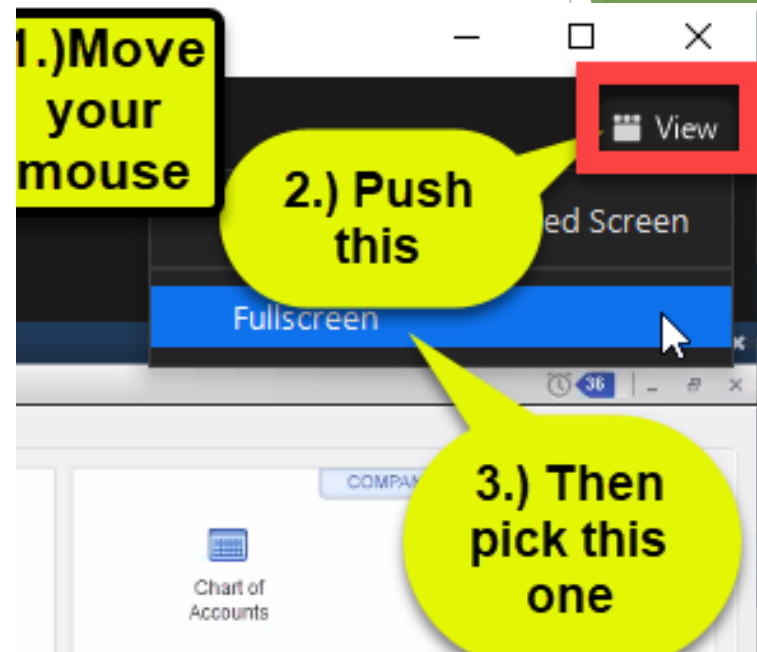
**Please Leave a Google Review!!  
(we appreciate it):**

<https://g.page/r/Ca4UBrkOS1rREAg/review>

**Get Social Use Hashtag #QBME  
Twitter: @QBMadeEasy  
@GreggBossen**

# TO MAKE SCREEN BIGGER IN ZOOM

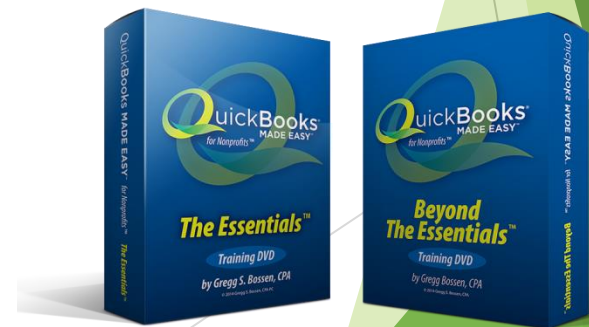
- MOVE YOUR MOUSE AROUND
- LOOK FOR “VIEW”  
ICON ON TOP RIGHT
- SELECT “FULL  
SCREEN”



# What We Do

## Train & Support Nonprofits using QuickBooks

- ❑ Streamable Training Products
- ❑ Nonprofit QB Tech Support
- ❑ Live Seminars/Webinars across the country



# New Nonprofit Services

## Quick Look

<https://quickbooksmadeeasy.com/product/quick-look/>

## Check Up

<https://quickbooksmadeeasy.com/product/check-up/>

## File Setup

<https://quickbooksmadeeasy.com/product/file-setup/>

## QuickBooks Migration

<https://quickbooksmadeeasy.com/product/quickbooks-migration-services/>

## Mapping to QuickBooks

<https://quickbooksmadeeasy.com/product/neon-little-green-light-mapping-to-quickbooks/>

## Donor Database Import

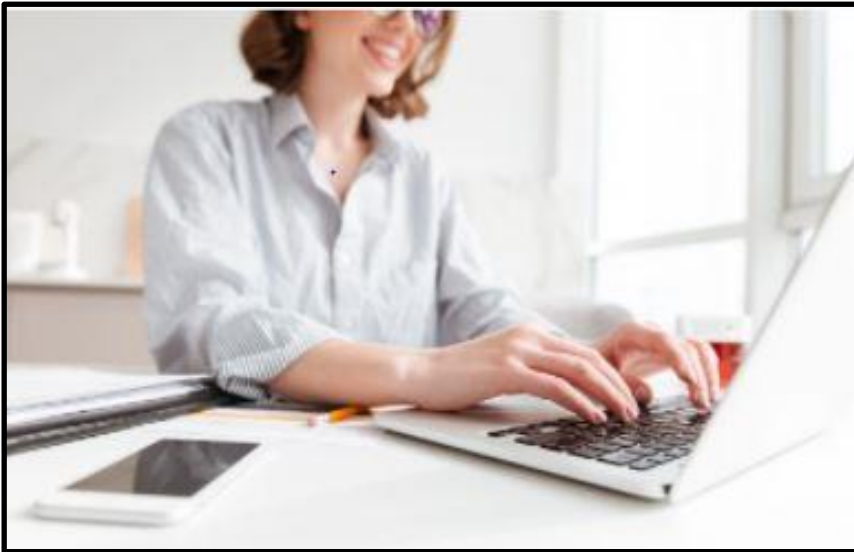
<https://quickbooksmadeeasy.com/product/donor-database-import/>

The logo for QuickBooks Nonprofit Services is displayed in a dark green rectangular box. The text "QuickBooks® Nonprofit Services" is written in white, with "QuickBooks®" on the top line, "Nonprofit" on the second line, and "Services" on the third line.

QuickBooks®  
Nonprofit  
Services

# Upcoming 3 Day Webinar Series QuickBooks Made Easy for Nonprofits

*A Comprehensive Training for Nonprofits Using QBO*  
**\$259 with \$40 off coupon code: BLOOM40** (reg. \$299)



**FOR QUICKBOOKS DESKTOP USERS**  
Tuesday, May 24 - Thursday, May 26  
2:00 - 4:30pm EST  
<https://bit.ly/3HOZRso>

**FOR QUICKBOOKS ONLINE USERS**  
Tuesday, May 31 - Thursday, June 2  
2:00 - 4:30pm EST  
<https://bit.ly/3vLYgB8>

More Webinars to be Announced!!

# Special Offer!

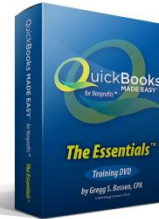
## Ends 4/30/2022 at 11:59PM PT

- The QuickBooks Online Essentials or Beyond the Essentials for only \$149

Code: **BLOOM149**

Get The Essentials or Beyond the Essentials Training!

**Normally: \$229.95 Each**

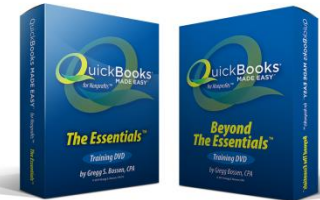


- QuickBooks Made Easy - The Bundle for only \$298

Code: **BLOOM298**

Includes The Essentials & Beyond the Essentials Training!

**Normally: \$399.95**



- Tech Support for 1 Year \$299

Code: **BLOOMTS299**

**Normally: \$499.00**





# Today's Agenda

- ✓ **Why Sync Bloomerang with QuickBooks?**
- ✓ **Which QuickBooks Products does Bloomerang sync to?**
- ✓ **Getting QuickBooks Ready**
  - ✓ **Understanding Entering Income in QuickBooks**
  - ✓ **Getting the lists set up correctly**
- ✓ **Setting up the sync**
- ✓ **Running the sync**
- ✓ **Syncing Issues**

# Why sync with QuickBooks?



**THAT'S EASY!!!!**

- ✓ **NO MORE DOUBLE ENTRY**
- ✓ **NO MORE RECONCILING  
TWO SYSTEMS**

# Which QuickBooks Products?

## **BLOOMERANG SYNCs WITH (US versions):**

- ✓ **QUICKBOOKS ONLINE ESSENTIALS**
- ✓ **QUICKBOOKS ONLINE PLUS**
- ✓ **QUICKBOOKS ONLINE ADVANCED**
- ✓ **QUICKBOOKS DESKTOP (KINDA)**

# Understanding Entering Income in QuickBooks and List Setup

# Entering Income Methods

- **LUMP BY CATEGORY METHOD**
  - **ALREADY USING ANOTHER DATABASE (DONOR/MEMBER MANAGEMENT)**
  - **THAT DOESN'T SYNC WITH QUICKBOOKS**
  
- **INDIVIDUAL METHOD**
  - **NEED TO USE QUICKBOOKS AS A DATABASE**
  
- **SYNC METHOD**
  - **USING ANOTHER DATABASE**
  - **THAT DOES SYNC WITH QUICKBOOKS**

# Workflow...



**INCOME GOES INTO BLOOMERANG**

- ENTERED MANUALLY
- CAME FROM WEB PAGE



**BLOOMERANG**  
CREATES SALES FORM IN QUICKBOOKS (Invoice/Payment or Sales Receipt)



**YOU RECORD BATCH DEPOSIT IN QUICKBOOKS**

# Setting Up the Sync

# Setting Up the Sync

- ✓ **Connect Bloomerang to QuickBooks**
- ✓ **Format Names and Transactions**
- ✓ **Upload lists to Bloomerang from QuickBooks**
- ✓ **Create Default Mapping Rule**
- ✓ **Create Custom Mapping Rules**



**Running the Sync**

**DEMO**

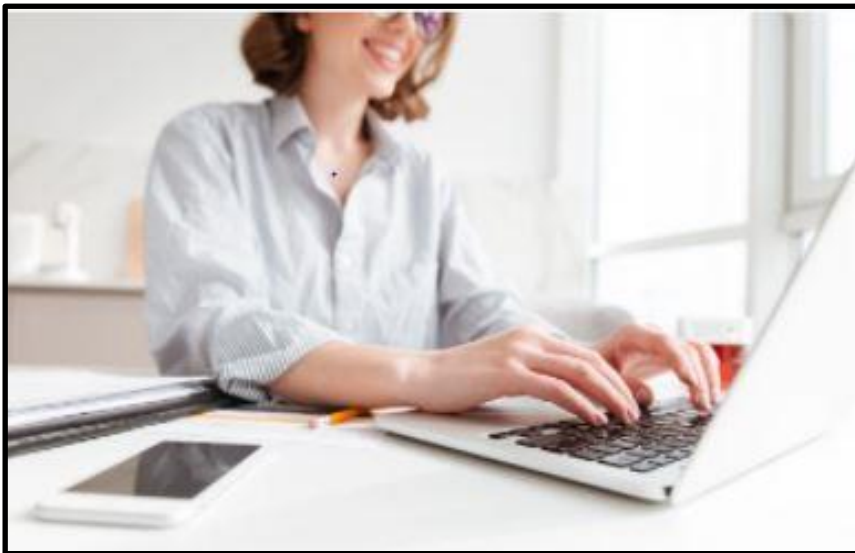
# Syncing Issues and How To Deal With Them

# Syncing Issues

- ✓ **TRANSACTIONS ENTERED IN BOTH PLACES MANUALLY**
  - **DUPLICATE TRANSACTIONS**
    - ✓ ESTABLISH A POLICY THAT ALL INCOME STARTS IN BLOOMERANG - ONE WAY!
- ✓ **BLOOMERANG TRANSACTION POINTED INCORRECTLY IN BLOOMERANG**
  - ✓ CORRECT IN QUICKBOOKS - OR CORRECT IN BLOOMERANG AND RE-SYNC
- ✓ **DUPLICATE CUSTOMER NAME BEING ADDED IN QUICKBOOKS**
  - ✓ BLOOMERANG IDENTIFIES CUSTOMERS BY NAME ONLY. MERGE THE DUPLICATE NAME.

# Upcoming 3 Day Webinar Series QuickBooks Made Easy for Nonprofits

*A Comprehensive Training for Nonprofits Using QBO*  
**\$259 with \$40 off coupon code: BLOOM40 (reg. \$299)**



**FOR QUICKBOOKS DESKTOP USERS**  
Tuesday, May 24 - Thursday, May 26  
2:00 - 4:30pm EST  
<https://bit.ly/3HOZRso>

**FOR QUICKBOOKS ONLINE USERS**  
Tuesday, May 31 - Thursday, June 2  
2:00 - 4:30pm EST  
<https://bit.ly/3vLYgB8>

More Webinars to be Announced!!

# Special Offer!

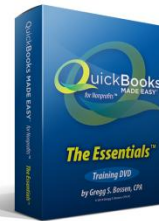
## Ends 4/30/2022 at 11:59PM PT

- The QuickBooks Online Essentials or Beyond the Essentials for only \$149

Code: **BLOOM149**

Get The Essentials or Beyond the Essentials Training!

**Normally: \$229.95 Each**

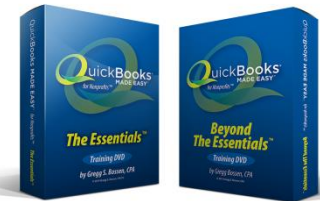


- QuickBooks Made Easy - The Bundle for only \$298

Code: **BLOOM298**

Includes The Essentials & Beyond the Essentials Training!

**Normally: \$399.95**



- Tech Support for 1 Year \$299

Code: **BLOOMTS299**

**Normally: \$499.00**





# THANK YOU!!!!

**Please Leave a Google Review!!  
(we appreciate it):**

<https://g.page/r/Ca4UBrkOS1rREAg/review>

**Presenter: Gregg S. Bossen, CPA**

**Get Social Use Hashtag #QBME  
Twitter: @QBMadeEasy  
@GreggBossen**