


Large, vibrant green Monstera leaves with characteristic holes, positioned on the left side of the slide.

Welcome to Bloomerang Academy

Thank you for joining us!

A smaller portion of a Monstera leaf, located in the bottom right corner of the slide.

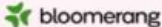
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Zoom Meeting ID: 844-414-128


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


Welcome to Bloomerang Academy

Thank you for joining us!

Ask questions

Audio Settings 

Chat  Raise Hand  Q&A 

Leave Meeting

Live Transcript

We all know what we want to do is spend
administration and more time Doing the w

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Subtitle Settings...



Chat



Raise Hand



Q&A



Live Transcript

QuickBooks and Bloomerang: A Match Made in Heaven (Seriously!)



Webinars

➤ **3 Day QuickBooks Fundamentals Webinar Series**

\$269 with \$30 off coupon code: BLOOM30 (reg. \$299)

Desktop (Tue 11/12 – Thu 11/14 @ 2-4:30pm ET)

<https://quickbooksmadeeasy.com/event/fundamentals-3-day-series-november-2024-desktop-version/>



Online (Tue 11/19 - Thu 11/21 @ 2-4:30pm ET)

<https://quickbooksmadeeasy.com/event/fundamentals-3-day-series-november-2024-online-version-2/>

Streaming ON-DEMAND Training

➤ **QuickBooks Made Easy: The Bundle**

\$298 with Coupon Code BLOOM298

<https://quickbooksmadeeasy.com/product/the-bundle/>

Tech Support for 1 Year \$299



\$298 with Coupon Code BLOOMTS299

<https://quickbooksmadeeasy.com/product/tech-support/>

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 – NOT THIS WEBINAR)**

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**

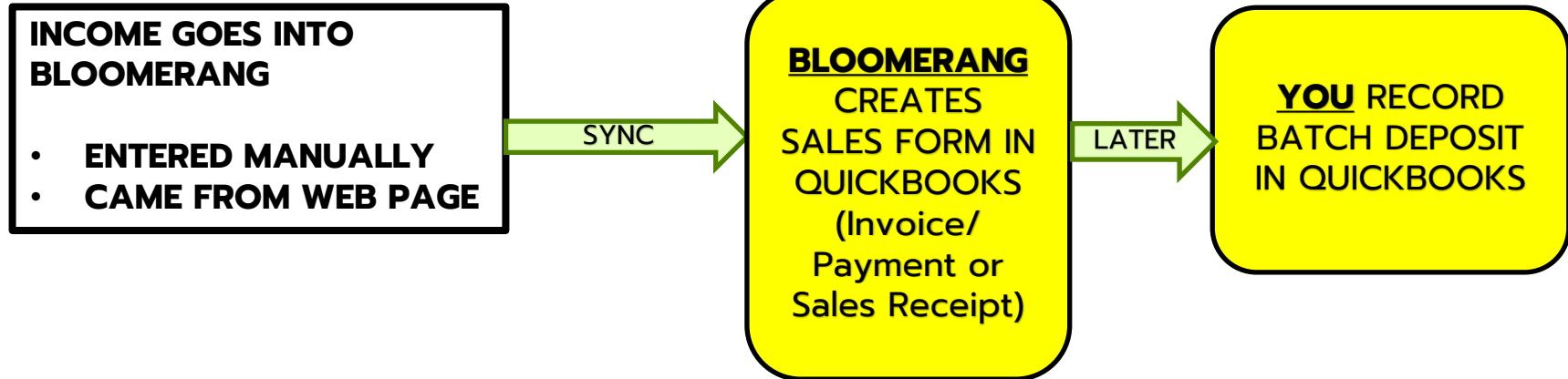
- **INDIVIDUAL METHOD**
 - **NEED TO USE QUICKBOOKS AS A DATABASE**

- **SYNC METHOD**
 - **USING ANOTHER DATABASE**
 - **THAT DOES SYNC WITH QUICKBOOKS**

Understanding Entering Income in QuickBooks and List Setup

DEMO

Workflow...



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

Tips for Mapping

Default Mapping Rule Tip:

- Set Default Product/Service to your most used one (usually Individual Contributions)

Create Custom Mapping Rules:

- Use "FUND" as the field that signals what account (and class) the transaction should point to in QBO

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 DISPLAY NAME AND 1ST EMAIL (BOTH MUST MATCH)
MAKE OLD NAME SUB OF BLOOMERANG CREATED ONE.

Webinars

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Tech Support for 1 Year \$299



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<https://quickbooksmadeeasy.com/product/tech-support/>

Upcoming QBME Webinars

3 Day QuickBooks Fundamentals Webinar Series
\$269 with \$30 off coupon code: BLOOM30 (reg. \$299)



FOR QUICKBOOKS DESKTOP USERS
Tues Nov 12 – Thurs Nov 14
2:00 – 4:30pm ET

<https://quickbooksmadeeasy.com/event/fundamentals-3-day-series-november-2024-desktop-version/>

FOR QUICKBOOKS ONLINE USERS
Tues Nov 19 – Thurs Nov 21
2:00 – 4:30pm ET

<https://quickbooksmadeeasy.com/event/fundamentals-3-day-series-november-2024-online-version-2/>

Special Offer!

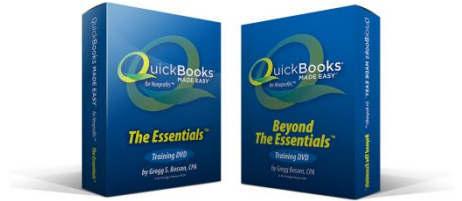
Ends 10/19/2024 at 11:59PM PT

➤ **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



Resources

Bloomerang Knowledgebase and Support Portal

