

# QuickBooks Integration

## ?? ADMINISTRATOR SETUP GUIDE

DynaTrail Dispatch allows companies to integrate their system with **QuickBooks Online** to simplify accounting and reduce manual data entry.

Once connected, invoices and financial transactions generated in DynaTrail can automatically be recorded in your QuickBooks account.

This integration helps ensure your accounting records remain accurate and synchronized with your dispatch operations.

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## Opening QuickBooks Integration Settings

To access the QuickBooks integration settings:

1. Click **Settings** from the main navigation menu
2. Select **Company Profile**
3. Click the **QuickBooks Defaults** tab

This section allows administrators to connect their QuickBooks account and configure how financial data will be posted.

## Connecting to QuickBooks

To enable QuickBooks integration:

1. Click **Connect to QuickBooks**
2. Log into your **QuickBooks Online** account
3. Authorize DynaTrail Dispatch to access your QuickBooks data

Once connected, DynaTrail will be able to create invoices inside QuickBooks using the products and services you configure.

### ? Tip

You must have **administrator access in QuickBooks Online** to authorize the integration.

## Products and Services Setup

DynaTrail Dispatch posts invoice line items to **QuickBooks Products and Services**.

Each billing category in DynaTrail should be mapped to a corresponding **Product or Service** item in QuickBooks.

These items determine how revenue is categorized in your accounting reports.

### ? Tip

In QuickBooks Online, products and services are used on invoices and are linked to accounts for reporting.

If you have not yet created the required products and services in QuickBooks, follow the official QuickBooks setup guide below.

**QuickBooks Setup Guide:**

[How to set up Products and Services in QuickBooks Online](#)

# Mapping Products and Services

Once your QuickBooks products and services are created, you can configure DynaTrail to use them when generating invoices.

Common examples include:

- Freight Charges
- Fuel Surcharge (FSC)
- Detention
- Layover
- Accessorial Charges
- Customs or Brokerage Fees

## ? Tip

Creating clear product and service names in QuickBooks will make your financial reporting much easier.

# Carrier Accounts - Driver Settlement Items

Carrier companies may also configure products or services used when recording driver-related transactions.

This ensures driver settlements and additional charge types are properly categorized inside QuickBooks.

## ? Tip

Proper product and service mapping helps maintain clean financial records and simplifies accounting reconciliation.

# Saving QuickBooks Integration Settings

After completing the QuickBooks configuration:

1. Verify that the QuickBooks connection is active

2. Confirm the correct products and services are configured

3. Click **Update**

DynaTrail Dispatch will now be able to synchronize invoices and billing transactions with your QuickBooks account.

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Revision #2

Created 2026-03-04 19:01:05 UTC by Admin

Updated 2026-03-06 22:04:40 UTC by Admin