**Setting Up New SOS Inventory to Existing QuickBooks Online (QBO) Account**

*Note*: This is best accomplished in the FireFox browser.

1. Go to your Product and Services list in QBO and turn on all columns. Then export the list to an Excel spreadsheet
2. Go to your reports in QBO and get a current report on your inventory asset account(s)
3. When ready, go to Apps at left side list in QBO
4. Search for SOS Inventory and select it
5. Click on “Get App Now” on the SOS Inventory information page
   1. This will present you with the page stating to pick a plan, select one by clicking the button under the plan you desire. With what we discussed on the phone it sounds like the Plus Plan should be the one you want. You can always upgrade later if needed
   2. It will give you a message to please wait while creating account
   3. You will then be placed into SOS at the dashboard and the accounts will be performing the initial sync (SOS retrieves copy of chart of accounts, sales tax center, and anything else you may have defined such as departments and classes, products and services and historical transactions)
   4. This will also add SOS Inventory to your My Apps list in QBO under the Apps
6. In SOS, go to the User Menu and select User Profile to change the password and add a security question/answer in case of password recovery
7. Go to the User menu again and select User Settings and change the time zone to yours
8. By now you should have received at least an email Welcoming you to SOS Inventory with a login link you can use later on if needed. You may have also received the email stating that the initial sync is completed and you are ready to go. If not, wait until you get that email to move on.
9. Go to the Gear icon in QuickBooks Online and select “Account and Settings”. Click on the Sales tab at the left and under Products and Services you need to turn off the “Quantity on Hand” tracking option to turn off inventory tracking in QBO. Save settings
10. In SOS, go to the gear icon and select QuickBooks Settings to ensure automated sync is set to desired level (most customers choose hourly)
11. Complete company settings under the Company Menu
    1. Company Settings – If needed, modify company header, enable multi-currency (make sure QBO is set up for multi-currency as well) and set home currency, and add your company logo (make sure the log file meets requirements in the note, see our users guide for more on setting logo size), and set Time Zone in company settings appropriately
    2. User Administration – add any other users you want to have access to SOS.
    3. Account Info – check the plan setting to make sure it is the one you selected when creating the account
    4. If SOS Plus or Pro, setup your locations if you are multiple warehouses, delivery vehicles, contract manufacturing, or other reason for additional location
12. Complete operational settings under the Gear Icon
    1. Inventory
       1. If you don’t want to let stock levels go negative, uncheck the first option
       2. Select all default accounts needed for new items, inventory changes, and item receiving
       3. Enable advanced search options if desired
       4. Select desired valuation method
       5. Review all other inventory options and enable/disable as desired
    2. Purchasing
       1. Set your default location to receive goods into
       2. Enable advanced search option
       3. Set default expense account for items that do not have one in their definition
       4. If using QBO Essentials, uncheck Synchronize POs
       5. Review all other purchasing options and set as desired
    3. Sales (General tab)
       1. Set default tax code
       2. Enable the Show Available for Sale on Forms (shows available stock while adding items to the sales forms)
       3. Set default payment method
       4. Set default terms for sales
       5. Enable advanced search option
       6. Review all other sales options and set as desired
13. Validate vendors and customers that synced from QBO (you can use the Bulk Edit tool under the company menu to edit and make any necessary changes to the customer list.
14. Finally, your items would have synced over from QBO as an initial inventory list.
15. If you had tracked items in QBO:
    1. Notify support via email (state that the email is for Dale) that your account is ready for the item conversion to eliminate the tracking in QBO. This process may take some time so it is best to do this on a Friday or end of day
    2. Contact technical support person doing conversion (in this case Dale) to go through follow up steps post conversion
16. Use the bulk edit tool to make sure your data synced correctly and add any missing essential information such as the account for asset and COGS. See section 6.1.5 in the SOS Inventory User’s Guide for more information on the data columns and process.
    1. Columns to make sure you have
       1. Name
       2. Sales Description
       3. Sales Price
       4. Purchase Description
       5. Cost
       6. Item Type (ex: Inventory Item, Service, Assembly, etc., see guide)
       7. Quantity on Hand
       8. Value on Hand (total value of stock)
       9. Income, inventory, COGS, and expense accounts as appropriate to item type
    2. Do not change column A. If you are adding new items, leave column A blank so SOS knows it is a new item
    3. If you have any specific questions on data before loading this spreadsheet, contact SOS technical support at 888-545-4146 x2 or via email at [support@sosinventory.com](mailto:support@sosinventory.com). This includes use of **bins, multiple locations, serial inventory, or lot inventory**.
17. Perform any other changes you may need that are discovered during this process. Setting up BOMs for assembly items, form templates, process templates, additional locations, etc.
18. Set up a call again to discuss any unique scenarios that may be needed before going operational.