

Knowledgebase > Settings > Integration Dashboard

Integration Dashboard

Megan De Freitas - 2024-12-02 - Settings

Overview

The Integration Dashboard provides a quick look at the health of your various SalesPad Cloud integrations and gives you valuable performance insight at a glance.

To view the Integration Dashboard, click **Integration Dashboard** from the Settings menu.

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|--|---|--|---|---|----------|
| Setup | | POS | Reports | Other | <u>^</u> |
| Account Class Contact Method Type Customer Class Customer Type Discount Management Fee Type Interaction Type Item Class Location Payment Terms Price Level | Purchase Order Type Reason Codes Sales Document Type Sales Territory Salesperson Shipping Method Tax Codes UofM Type Vendor Class Workflow | Employees Grid Menu Setup Till Counting Till Drawer | Dynamic Grid Reports Grid Reports Import History Inventory Stock Status Report Designer | Integration Dashboard Security System Settings Manage Organization | |

The Integration Dashboard window will open, displaying your current thirdparty integrations.

| h | ntegration Dashboard | | | | |
|---|---|-------------------|--------------------|---|--------|
| | 3rd Party Integrations Integration Logs | | | | |
| | O We use today's statistics to measure the health of your integration | | | | |
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Each third-party integration will have its own field displaying import and export information for the integration. Imports and exports displayed indicate data exchanged over the life of the integration. By default, integrations run and data is refreshed every 10 minutes.

SalesPad integrates QuickBooks Online information in the following order:

- Company Settings
- Classes
- Accounts
- Locations
- Tax

- Payment Terms
- Item Masters
- Customers
- Vendors
- Documents

The bar on the far right of the integration field is green if the integration is healthy and error-free, red if it is not. To visit the <u>System Settings</u> entry for the integration, click the gear in the lower right-hand corner of the integration field.

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The System Settings page is where you manage your integration settings.

| Inventory Settings Import QuickBooks Estimates As POS Integration Settings Estimate Payment Settings Import QuickBooks Sales Orders As QuickBooks Online Import Settings Order Sales Settings Summary Taxable Item Shopify Integration Settings Smok Twisted Messes Bundle - Smok X Cube II 150w Import QuickBooks Refunds As Import QuickBooks Refunds As | Search | QuickBooks Online Import Setting | gs |
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| | | Michigan Dept. of Revenue Payable | × |

For more information on QBO import settings, please visit the Integrating with QuickBooks Online section of our <u>Getting Started</u> documentation.

To view a log of integration activity, click the Integration Logs tab on the Integration Dashboard.

| Integration Dashboard | Integration Dashboard | | | | |
|------------------------|---|------------|------------|----------------|--|
| 3rd Party Integrations | 3rd Party Integrations Integration Logs | | | | |
| 2 | | | | | |
| Integration | Import / Export | # Imported | # Exported | Failed Imports | |
| QuickBooks Online | Import | 1 | 0 | 0 | |
| QuickBooks Online | Export | 0 | 0 | 0 | |
| QuickBooks Online | Export | 0 | 0 | 0 | |
| QuickBooks Online | Export | 0 | 0 | 0 | |
| QuickBooks Online | Export | 0 | 0 | 0 | |
| QuickBooks Online | Export | 0 | 0 | 0 | |

If you have a failed import or export, the Error Message column will contain information that will help SalesPad Cloud Support resolve the problem for you.

| Failed Exports | Error Message |
|----------------|-------------------------|
| 0 | |
| 1 | 75f56dbb-b609-40a6-aec |
| 3 | f7fc45a9-e924-498a-8973 |
| 3 | 2b3cdbfd-cff8-4201-83b5 |
| 3 | ca1852c7-2bd1-470f-9ac |

To contact SalesPad Cloud Support about a failed integration or any other issue, send an email to <u>cloudsupport@cavallo.com</u>, or call 616-245-1221.