



## SalesPad Cloud Conversion Tool

Cavallo IT - 2024-11-25 - Miscellaneous

### **QuickBooks Desktop to SalesPad Cloud Integration Overview**

SalesPad has created a proprietary conversion tool that pulls information directly from the QuickBooks Company File and imports it into SalesPad Cloud, eliminating the need to use Inuit's QBO conversion tool. All you'll need to do in QuickBooks Online is set your beginning account balances - SalesPad Cloud handles the rest!

**Note:** The conversion from QuickBooks Desktop to QuickBooks Online *must* be completed by SalesPad staff.

The data our tool pulls in includes:

#### **Customers**

- Inactive Status
- Customer Type
- Sales Rep
- Price Level
- Credit Limit

#### **Vendors**

- Vendor Notes
- Inactive Status
- Vendor Type

#### **Item/Vendor**

- Links between items and their respective primary vendors are established.

#### **Sales History**

Importing sales history is optional. Choose between one, two, or three years worth of history to import.

#### **Purchase Order History**

Importing purchase order history is optional. Choose between one, two, or three years worth of history to import.

#### **Entities Created During the Integration**

The following entities are created in SalesPad Cloud.

**Price Levels**

As part of the import, we also update the appropriate customers in the system so that they match the Quickbooks Desktop file.

**Customer Types**

As part of the import, we also update the appropriate customers in the system so that they match the Quickbooks Desktop file.

**Vendor Types**

As part of the import, we also update the appropriate vendors in the system so that they match the Quickbooks Desktop file.

**Sales Reps**

As part of the import, we also update the appropriate customers in the system so that they match the Quickbooks Desktop file.

**Inventory Numbers**

An inventory adjustment that contains a line for each of the items that had existing On Hand inventory in the Company File is created in SalesPad Cloud. The inventory adjustment is not auto-posted, allowing manual updates, such as a costing update, before being posted, if required.

**Open Sales Orders**

Sales orders that are still open in the Company File are imported and created as sales orders in SalesPad Cloud. Any order that is not closed in QuickBooks Desktop and contains at least one line that is not fully invoiced will be imported. The sales lines created on the imported orders will only contain the quantity that was not invoiced in QuickBooks Desktop. This means that if a line in QuickBooks Desktop had a quantity of ten, and eight of those had already been invoiced, the order imported into SalesPad Cloud would have a line with a quantity of two. The order number will be identical between the two systems.

**Note:** The SalesPad Cloud Conversion tool does not support converting grouped items.