



Q What is MX™ QuickBooks Sync?

A MX™ QuickBooks Sync is a solution designed for synchronizing financial data from Priority Payment Systems' MX™ Merchant payment platform to the Intuit QuickBooks accounting platform.

Q Does a merchant need to process through the MX™ front-end/gateway?

A YES, MX™ QuickBooks will only sync data from MX™ Merchant or any of its integrated products. MX™ Invoice, MX™ Express, integrated terminals, MX™ Quickpay, Payment Links, and any other solutions that are integrated with the MX™ Checkout API.

Q Can I use MX™ QuickBooks Sync to run transactions in QuickBooks POS, or QuickBooks Online, Desktop, or Enterprise?

A No, this is not a plug-in for running transactions in QuickBooks interface. The Sync tool will only sync data from MX™ and send this information to the merchants' QuickBooks Online accounting platform.

Q Can any Merchant use MX™ QuickBooks Sync?

A Yes, as long as they are processing transactions through the MX™ Merchant platform.

Q Can an ISO activate MX™ QuickBooks Sync on behalf of a Merchant?

A No. MX™ QuickBooks Sync can only be activated by the Merchant via the MX™ Merchant Apps section. In order to authorize the import of data into the merchant's QuickBooks Online account, the merchant must log into QuickBooks where they will be prompted to activate.

Q Can a Merchant activate MX™ QuickBooks Sync via the Intuit App Marketplace?

A At this time we do not support activation via the Intuit marketplace.

Q When does data synchronization take place?

A Data syncs automatically daily. Payment or transaction data, once settled, is available within 24 hours, however, Customer and Invoice data syncs immediately. If needed however, a manual re-sync may also be initiated in the app with the following options:

- **Current Month** (Automatic Daily)
- **Any Month** (Manual "Re-Sync") Within 1 hour

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How can a merchant deactivate the QuickBooks Sync app?

A

To deactivate the application, choose “Deactivate” on the QuickBooks App in MX™ Merchant. By deactivating the application within the MX™ Merchant marketplace, the subscription will be canceled immediately. The merchant will be billed for the current month of service, as well as any prior months purchased, regardless of the time of deactivation as **service is not prorated**.

NOTE // Deactivation revokes MX™ Merchant access to Intuit API's for that merchant such that any currently executing synchronization tasks will result in “Unable to sync” errors for any pending records it attempts to synchronize. Pending synchronization tasks will be canceled and will not process.

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What versions of QuickBooks are supported?

A

Currently, only QuickBooks Online is supported.

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What data is synced from MX™ Merchant to QuickBooks?

A

Customer

- First Name
- Last Name
- Company Name
- Email
- Phone
- Mobile
- Website
- Billing/Shipping
- Name
- Address 1
- Address 2
- City, State, Postal Code, Country

Invoice

- Includes any discounts, payments or refunds applicable to the invoice
- Partial refunds against an invoice payment accounted for as a Credit Memo
- Invoice Id
- Customer Id
- Invoice Number
- Invoice Date
- Due Date
- Billing
 - Email
 - Name
 - Address Line 1
 - Address Line 2
 - City, State, Postal Code, Country
- Shipping
 - Email
 - Name
 - Address Line 1
 - Address Line 2
 - City, State, Postal Code, Country

- Items
 - Description
 - Unit Price
 - Unit Quantity
 - Line Discount Amount
 - Line Amount
 - Invoice Discount Amount
 - Total Amount

Payment

- Creates a Sales Receipt if payment is not associated with an invoice
- Import occurs after payment is settled
- Support for Partial Refunds (with QuickBooks link to associated refund)
- Imports associated Invoice/Customer even if they were not created in the current month
- Refund Sync
 - Creates refund receipt or Credit Memo as needed to accurately reflect customer transaction

Q Where can I view the status of data to be synced?

A In MX™ Merchant choose “Settings”, then choose “QuickBooks”. The following may be reviewed:

- Monthly Overview
 - Sync Status by Month (including an option to request a “re-sync”) showing possible states including “Waiting”, “In Progress”, “Partial Sync”, “Incomplete Sync”, and “Fully-Synced”
 - Success/Failure Detail by Category (Customer, Invoice, Payment, Refund)
 - Full Sync details may be review by choosing the appropriate month

Q What does MX™ QuickBooks Sync cost?

A ISO buy rates are disclosed in the MX™ Merchant Addendum to Schedule A which can be found in MX™ ISO Agent Folders > MX™ Merchant > MX™ Merchant Addendum to Schedule A

The cost to the merchant is monthly and any prior months to be synced will be billed accordingly. For example, if a merchant began processing in January and activated MX™ Quickbooks Sync in October, billing would begin for October and each following month. If a merchant chooses to sync months prior to October, an additional one-time \$25 per previous month sync'd is applicable.

Q What rates are merchants paying if processing directly through Intuit, vs if they processed through MX™ directly?

A Intuit uses flat rate processing as below. The cost benefit to a merchant by switching to MX™ can now be realized, while retaining the automatic update of their QuickBooks Online product!

ACH	Swipe/Chip	Invoiced	Keyed
1% (\$10 max)	2.4% + \$.25	2.9% + \$.25	3.4% + \$.25