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Introduction

This Avalara Module is an Add-On Feature to the existing Mobius Connect: QuickBooks Online integration for ConnectWise Manage which allows you to import your ConnectWise Manage accounting data directly into your QuickBooks Online account. You can access Mobius Connect at: <https://connect.mobiusworks.com>.

System Requirements

In order to use the Mobius Connect Avalara Tax Module Add-On, you must have the following on your network and/or your machine(s):

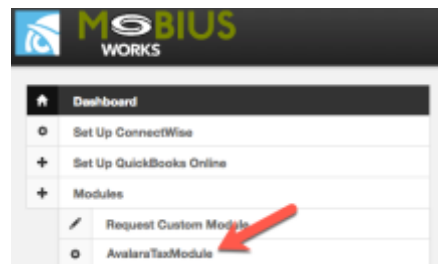
- An active subscription to the [ConnectWise Avalara integration](#)
- An active subscription to the [Mobius Connect: ConnectWise Manage-QuickBooks Online integration](#)
- Internet Access: An Internet connection is required.

Mobius Connect

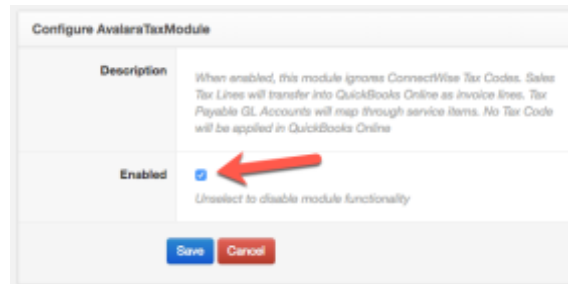
Mobius Connect is the web service that will be used to provide a user interface for the ConnectWise Manage – QuickBooks Online Integration. The Integration allows you to import your Manage accounting data directly into your QuickBooks Online account.

Avalara Tax Module

Once you have purchased the Avalara Tax Module Add-On, you will see a new feature called “AvalaraTaxModule” under the Modules navigation. **This module will be disabled by default.**



To enable the module, click on *Modules > AvalaraTaxModule*. Select the “Enabled” checkbox and click “save.”



When enabled, this module ignores Tax Codes in Manage and QuickBooks Online. Instead, Sales Tax Lines will transfer into QuickBooks Online as invoice lines. Tax Payable GL Accounts will map through service items. No Tax Code will be applied to the invoice in QuickBooks Online.



GUIDE TO INTEGRATION IMPLEMENTATION

Validating a Batch

Invoices

To verify invoices in QuickBooks Online, navigate to *Home > Transactions > Sales*.

Credit Memo #951
?

Gold Test Company | contact@mcgee.me

Send later Co/Rec

Billing address
Gold Test Company
65 Main St
Springfield, MA 01105

Credit Memo Date
02-15-2017

Custom 1

AMOUNT TO REFUND
\$262.03

Credit Memo no.
951

Division
D01

Class

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX
1	02-15-2017	InventoryTypeProduct	Customer Description Blah (EACH)	5	30.50	152.50	
2	02-15-2017	41000	Credit Memo (HOUR)	1	100	100.00	
3		23100	Tax COMPLEX COMAGNC1	1	9.53	9.53	
4							

Invoice List > GL Entry List
Invoice #951

Invoice: 0 | Time: 0 | Expense: 0 | Products: 1 | Routing: 1 | **GL Entries: 8** | Commission: 0 | Audit Trail: 0

SEARCH CLEAR | Export View (No View) | 1 - 8 of

Batch ID	Type Name	Description	Account	Debit	Credit	Cost	GL Product ID	Sales Code	COGS	Inventory	Last Update
2017-04-2	Accounts Receivable	Accounts Receivable	11000D01-P01		\$262.03	\$0.00					Wed 02/15/201...
2017-04-2	Revenue	Revenue	41000D01	\$190.00	\$0.00	\$0.00	TestProductID		\$4000	12000	Wed 02/15/201...
2017-04-2	Revenue Product	Taxable Products	41000Revenue...	\$152.50		\$-77.50			\$4000	12000	Wed 02/15/201...
2017-04-2	Sales Tax Payable	Level 3 Sales Tax	23100D01-P01		\$0.00	\$0.00					Wed 02/15/201...
2017-04-2	Sales Tax Payable	Level 4 Sales Tax	23100D01-P01		\$0.00	\$0.00					Wed 02/15/201...
2017-04-2	Sales Tax Payable	Level 3 Sales Tax	23100D01-P01		\$0.00	\$0.00					Wed 02/15/201...
2017-04-2	Sales Tax Payable	Level 2 Sales Tax	23100D01-P01		\$0.00	\$0.00					Wed 02/15/201...
2017-04-2	Sales Tax Payable	Level 1 Sales Tax	23100D01-P01	\$9.53		\$0.00					Wed 02/15/201...



GUIDE TO INTEGRATION IMPLEMENTATION

Item Receipts

To verify item receipts in QuickBooks Online, navigate to *Home > Transactions > Expenses*.

Bill
?

BALANCE DUE

\$74.91

Make payment

Gold Test Vendor

Mailing address

GTVXREF
Gold Test Vendor
65 Main St
Springfield, MA 01105

Terms

10

Bill date

04-24-2017

Due date

04-24-2017

Bill no.

Division

D01

Account details

#	ACCOUNT	DESCRIPTION	AMOUNT	CUSTOMER	CLASS
50000	Freight	5.00			
53000	Product Tax	4.10			
53500	Freight Tax	0.31			
4					

Unposted Procurement > Purchase GL List

PO Number	Packing Slip	Product ID	Quantity	Type Name	GL Description	Account	Debit	Credit	Cost	GL Product ID	Sales Code	COGS	Inventory
164		Freight		Purchase Order Freight	Purchase	40500D01-#01	55.00		55.00		Freight	54930	
164	164	Purchase Order Freight Tax		Purchase Order Freight Tax	Level 1 Sales Tax	53500	30.31		30.00				
164	164	Purchase Order Freight Tax		Purchase Order Freight Tax	Level 2 Sales Tax	53500	30.00		30.00				
164	164	Purchase Order Freight Tax		Purchase Order Freight Tax	Level 3 Sales Tax	53500	30.00		30.00				
164	164	Purchase Order Freight Tax		Purchase Order Freight Tax	Level 4 Sales Tax	53500	30.00		30.00				
164	164	Purchase Order Freight Tax		Purchase Order Freight Tax	Level 5 Sales Tax	53500	30.00		30.00				
164	164	Purchase Order Product Tax		Purchase Order Product Tax	Level 1 Sales Tax	53000	34.10		34.10				
164	164	Purchase Order Product Tax		Purchase Order Product Tax	Level 2 Sales Tax	53000	30.00		30.00				
164	164	Purchase Order Product Tax		Purchase Order Product Tax	Level 3 Sales Tax	53000	30.00		30.00				
164	164	Purchase Order Product Tax		Purchase Order Product Tax	Level 4 Sales Tax	53000	30.00		30.00				
164	164	Purchase Order Product Tax		Purchase Order Product Tax	Level 5 Sales Tax	53000	30.00		30.00				
164	164	Inventory/TradeProduct		Revenue/Product	Purchase	41000 Revenue	915.50	915.50				54930	12000
164	164	Taxes&COCC re-billed for Source		Revenue/Product	Purchase	40500D01	250.00	250.00			SerialText	54930	12000



Customer Support

If you have any questions, please feel free to contact our consulting team at Help@ConnectWise.com.

There is also an integrated message submission form accessible from the side navigation menu under Contact Support. You can use this form to easily submit support requests to Manage. If the support request is related to an issue batching transactions, you can select to attach the log for the batch in question by selecting the “Send Batch Log?” checkbox, selecting the QuickBooks Online configuration the batch was made against, and finally selecting the BatchID.

Provide a Subject and Message, and click Submit to send the Support Request.

Contact Us

For more information about any of our products or services, please feel free to contact your Account Manager at AccountManager@ConnectWise.com.

Don't have an Account Manager yet? No problem! Please feel free to contact us at <http://www.connectwise.com/contact-us>.