How To Integrate Quickbooks With CrownSIS

Integrating QuickBooks with CrownSIS allows you to automate and streamline financial operations like student billing, payment tracking, and fee reconciliation. This guide walks you through the entire setup process—from configuring your QuickBooks Developer account to activating the integration inside CrownSIS.

Step 1: Access the Intuit Developer Portal

To begin, access the Intuit Developer Portal:

1. Go to https://developer.intuit.com
2. Sign in using your Intuit credentials.
3. Once logged in, you'll land on the workspace dashboard.
4. You can either:
   - Use the default sample workspace provided by Intuit
   - Or create a new workspace for your institution

Step 2: Create Your QuickBooks App

Now, create an application to enable the integration:

1. Inside the workspace, click **Create an App**.
2. Give your app a name (e.g., "CrownSIS Integration").
3. Select **QuickBooks Accounting API** and grant all required permissions.

After creation:

- QuickBooks will generate a **Client ID** and **Client Secret**.
- Use the visibility toggle to view and copy them.
- Store these credentials securely, as you'll need them in CrownSIS.

Set the Redirect URI:

1. Go to **App Settings → Keys and Credentials**.
2. In the **Redirect URI** section, enter the URI provided in CrownSIS documentation or by support.
3. Save the changes.

Step 3: Configure CrownSIS with QuickBooks Credentials

Now, use the credentials inside CrownSIS:

1. Log in to CrownSIS as a **Super Administrator**.
2. Navigate to: **Settings → Billing and Fees → Integrate with QuickBooks**.
3. Enter the **Client ID** and **Client Secret** copied from the QuickBooks Developer Portal.
4. Choose your environment:
   - **Sandbox** for testing
   - **Production** for live data
5. Click **Save**.

Step 4: Connect to QuickBooks

After saving:

1. Click the **Connect to QuickBooks** button.
2. You'll be redirected to the QuickBooks authentication screen.
3. Sign in if prompted, and select the company you want to connect.
4. Once connected, you'll see your company's name, address, and time zone appear in CrownSIS.

This confirms the connection was successful.

Step 5: Enable Synchronization

To activate real-time syncing:

1. Locate the **Sync Toggle Switch** in the QuickBooks integration area.
2. Turn it **ON** to enable continuous syncing.

Important:
If this toggle is left off, integration won’t function. Student billing and fee data will not sync between CrownSIS and QuickBooks.

Integration Complete

Your CrownSIS system is now successfully integrated with QuickBooks. Billing data will sync automatically, helping your institution reduce manual work and maintain accurate financial records.

Need Help?

For assistance, contact us at: **opensishelp@os4ed.com**

Visit: https://CrownSIS.com

Revision #8
Created 2026-01-26 21:00:31 UTC by Administrator
Updated 2026-01-26 22:05:52 UTC by Administrator