FAQ: Running a Report Of Synced Transactions in Quick Books

Users are able to run report by Chart of Accounts from within their online Quick Books account. Below are the steps:

1. Click on the Transactions from left menu
2. Click on the Chart of Accounts
3. Search for Fundly CRM's Chart of Account by Account’s Name/Description or Account’s Code
4. Click on Run the Report
5. User will get all transaction under this Chart of Accounts