Data sent from **Blueprint OMS** to **QuickBooks** includes:

Creating/Editing/Inactivating Customers

- Patients created in Blueprint OMS become customers in QB
- Updates to the patient address/phone in Blueprint OMS are reflected in the QB customer file
- Patients made inactive/deceased in Blueprint OMS become inactive in QB
- Insurers created in Blueprint OMS become customers in QB
- Updates to the insurer address/phone in Blueprint OMS are reflected in the QB customer file

Creating/Editing/Inactivating Items

- Products or services (e.g. batteries, accessories, orderable items, services) created in the Blueprint OMS **Setup** menu are also created in the QB item list
- Updates to the items (pricing, income/expense accounts, inactivating) are reflected in the QB item list
- *Hearing aids* and *Options* are mapped to items called "Hearing aid" and "Option" in the QB item list, to avoid having thousands of items listed

Creating/Editing/Voiding Invoices

- An invoice created in Blueprint OMS generates a matching invoice in QB
- If an amount on the invoice has been allocated to a 3rd party, a matching 3rd party invoice generates in QB
- Invoices are assigned a "Class" in QB, based on the location of the sale in Blueprint OMS
- If an invoice is edited in Blueprint OMS, the old invoice is voided in QB and the new invoice generates
- Invoices voided in Blueprint are also voided in QB

Customer payments

- Customer payments and payment applications in Blueprint OMS are sent to QB
- Payments can be automatically deposited into a specific G/L account based on the clinic location and payment method

Editing/Deleting/Unapplying customer payments

- Payments which are edited, deleted, or unapplied in Blueprint will be edited, deleted, or unapplied in QB

Data sent from **Blueprint OMS**
to **QuickBooks** includes:

Customer deposits (prepayments)

- Deposits which are edited, deleted, or unapplied in Blueprint will be edited, deleted, or unapplied in QB
- Deposits/prepayments entered in Blueprint OMS post to the customer file in QB and sit on the account as a credit until applied against an invoice in Blueprint OMS
- Deposits applied against orders in Blueprint OMS will be automatically applied against the invoice in QB, once the final invoice is created in Blueprint OMS

Creating/Deleting Patient credit memos

- Items returned in Blueprint OMS send credit memos (for the patient as well as any 3rd parties involved) to QB
- Deleting a return in Blueprint OMS, deletes the return in QB
- Credit memos are assigned the correct "Class" in QB based on the location of the return in Blueprint OMS

Vendor bills

- Manufacturer invoices entered in Blueprint OMS are sent to the QB vendor center (each manufacturer has an account created in the QB vendor center)

Vendor credit memos

- Returned hearing aids in Blueprint OMS send credits to the vendor center in QB
- Deleting a return of hearing aids in Blueprint OMS voids the credits in the vendor center in QB

Bank deposits

- Undeposited payments can be deposited to a specific bank account in Blueprint OMS, and the deposit will be sent to QB
- Optionally, a portion of the deposit can be held in Blueprint OMS for transfer to a "Petty cash" account in QB
- Blueprint OMS can automatically deposit specific payment types (i.e. Visa, MasterCard, E-check, etc.) to the bank account in QB at the request of the customer

Patient refunds

- Patient and 3rd party payments which are refunded in Blueprint OMS are refunded to the customer file in QB
- Patient and 3rd party refunds deleted from Blueprint OMS are deleted from QB