

Streamline Connect Customer Link Guidelines

The Streamline Connect Customer Link is a process used by Streamline Connect to establish a connection between QuickBooks Online Customers and Streamline Agents and Offices for accounts that have been running QuickBooks Online in parallel with Streamline AMS. Since these accounts have complete Customer lists in their QuickBooks Online that exist completely independently of Streamline AMS, there is no pre-existing connection to establish which QuickBooks Online Customers are supposed to be represented by which AMS Agents or Offices. The Streamline Connect Customer Link process attempts to make the link between QuickBooks Online Customers and AMS Agents/Offices by comparing certain fields within each system. The following guidelines are intended to make this process as accurate as possible.

Guidelines For Agents

- The QuickBooks Online Customer's First Name and the AMS First Name must be identical.
- The QuickBooks Online Customer's Last Name and the AMS Last Name must be identical.
- If using the "Link With Email" option in Streamline Connect, the primary Email address and the AMS Agent Email must be identical.

It is always advised to use the "Link With Email" option instead of the "Link Without Email" option, as the likelihood of incorrect matches increases significantly with fewer points of comparison.

Guidelines For Offices

- The QuickBooks Online Customer's Company and the AMS Office Name must be identical.
- The QuickBooks Online Customer must not have any information in either the First Name or Last Name field. If there is any information in either one of these fields, Streamline Connect will see that Customer as an Agent, and will not attempt to link the Customer to an AMS Office.

General Guidelines

- It is the user's responsibility to ensure that any Customer Links are accurate. Streamline Connect includes a tool to edit the connections.
- Any Unmatched Customers can be linked manually by the user. Streamline Connect includes a tool to link Unmatched Customers to AMS Agents and Offices.