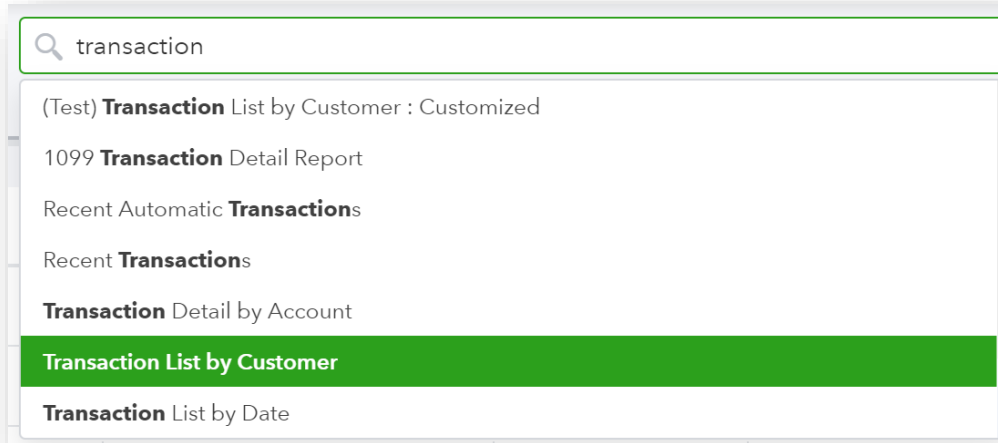


## Automation and Export Guide for QuickBooks Online

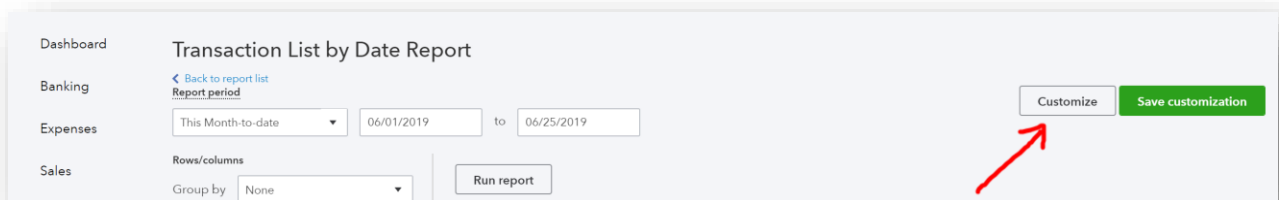
These instructions explain how to set up your LoyaltyLoop survey export file from within QuickBooks Online (Step 1), and automatically schedule the report to be emailed to SurveyAdvantage on your selected survey launch frequency (Step 2). You will only need to set this up once. Once it is configured, your survey export file will be automatically sent to SurveyAdvantage on your selected schedule allowing us to execute your customer feedback loop.

### STEP 1: Generate Export Report

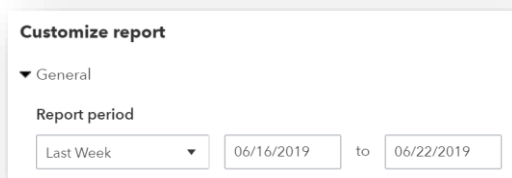
1. Sign in to your QuickBooks Online (QBO) account
2. Click Reports from the left main menu
3. In the report search box, search for “Transaction List by Customer” report and run it



4. Click the Customize button in the upper right screen

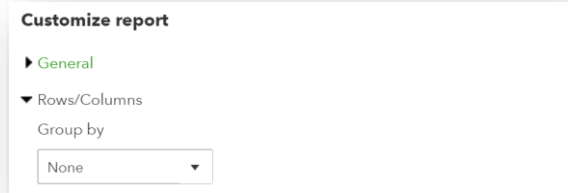


5. Click the General tab, and set the Report Period to match the frequency you wish to survey your recent customers. For example, if you wish to survey customers weekly, then select “Last Week” for the Report Period. For daily, select “Yesterday”. For monthly, select “Last Month”.

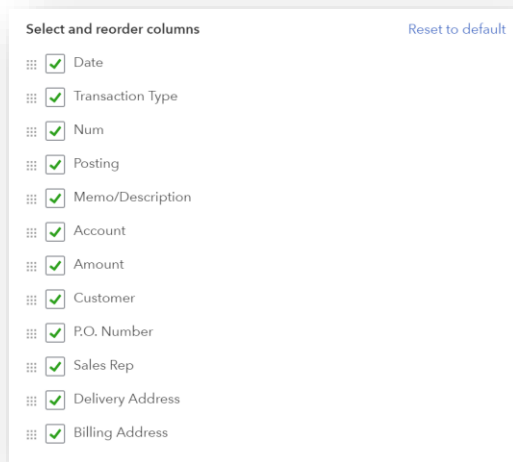


## Automation and Export Guide for QuickBooks Online

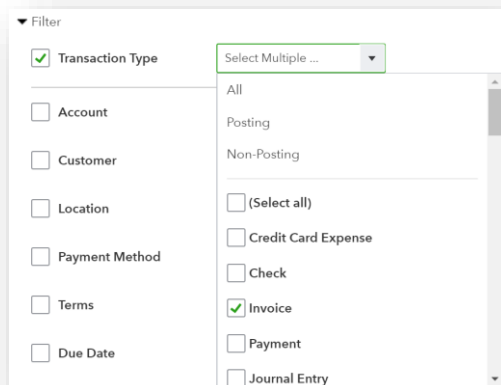
- Click the Rows/Columns tab, and set 'Group by' to None



- Click the 'Change Columns' link and add the following fields by clicking the checkbox next to the name: Delivery Address, Customer, Billing Address, Sales Rep, PO#. There is no limit to the fields you can include. If you see a field that you think would be helpful to have associated when you view the customer's feedback in LoyaltyLoop, add the field.

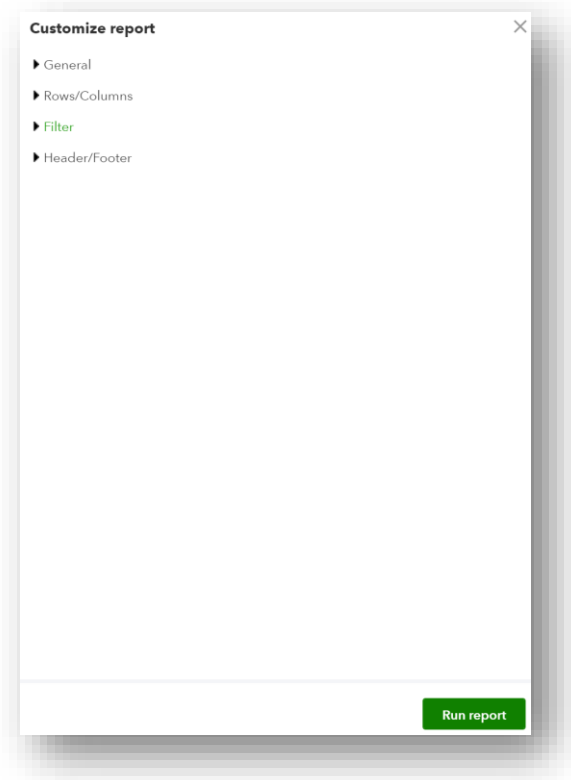


- Click 'Filter', then Transaction Type. Select (1) Invoice and (2) Sales Receipt. If you also wish to survey prospects, select Estimates. If you use any other Transaction Types to track sales to your customers, select those Types too.



## Automation and Export Guide for QuickBooks Online

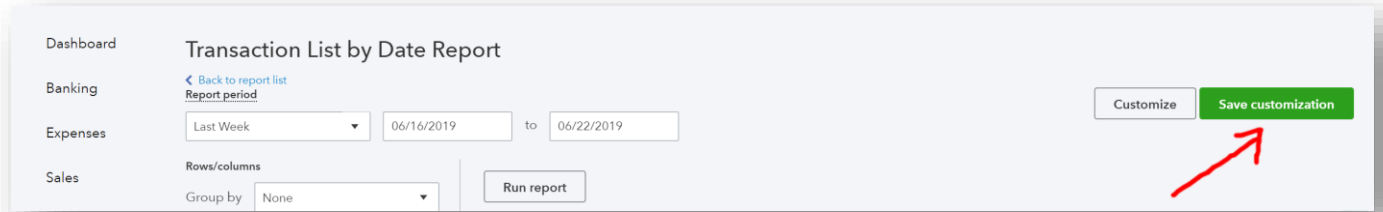
### 9. Click Run Report



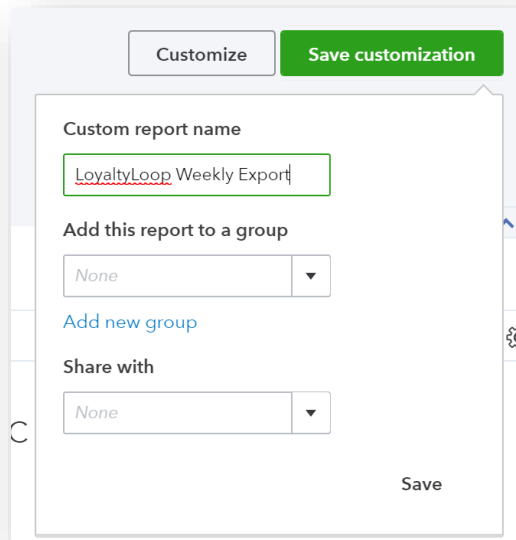
10. Look at the report on screen. In the column labeled Delivery Address, you should see email addresses for your customers. If you do not, or if any are missing, add email addresses to the customer's record. Make sure you have a process to enter email addresses for each new customer in the future.
11. Do not worry about duplicate email addresses if you see any. LoyaltyLoop will apply filters to remove duplicates, remove bad email addresses, and remove any customer surveyed in the prior 90/120/180 days per your system settings.

## Automation and Export Guide for QuickBooks Online

12. Click Save Customizations from the upper right of the screen

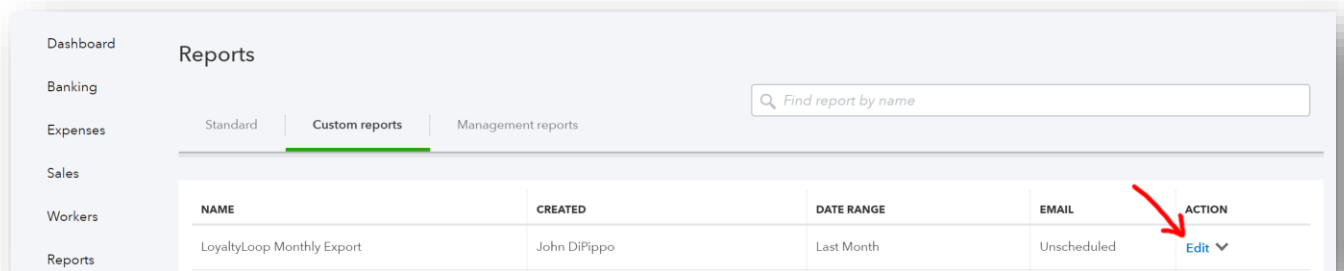


13. Change the name to be “LoyaltyLoop <PERIOD> Export” (e.g. “LoyaltyLoop Monthly Export”)



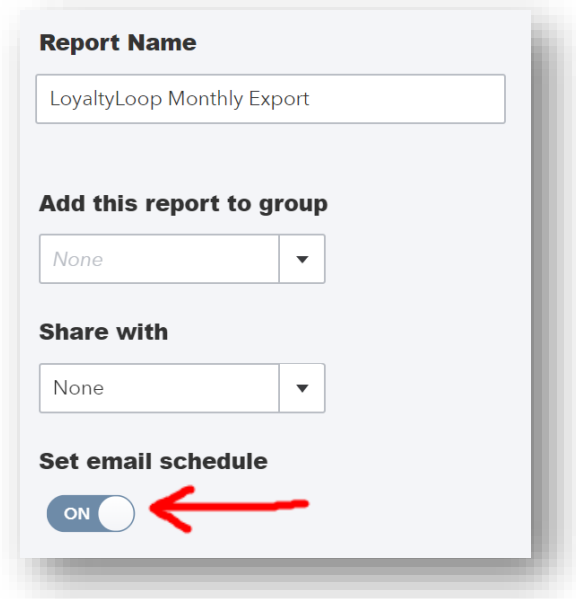
### STEP 2: Schedule Report to be Automatically Emailed to SurveyAdvantage

1. Once you have completed the above steps, click Reports from the left main menu
2. Click Custom Reports from the top menu
3. Find the report you just saved (e.g. “LoyaltyLoop Monthly Export”)
4. Click the Edit button to the right of that report



## Automation and Export Guide for QuickBooks Online

5. Turn ON the Set Email Schedule button



**Report Name**

LoyaltyLoop Monthly Export

**Add this report to group**

None

**Share with**

None

**Set email schedule**

ON

6. Set the recurrence when this report should be run and sent to us (#1 and #2 in image)
  - a. If you launch Daily per item 5 in Step 1 above, select Daily recurrence, set Every 1 Day, set End to None
  - b. If you launch Weekly per item 5 in Step 1 above, select Weekly recurrence, set Every 1 Week, set On Monday, set End to None
  - c. If you launch Monthly per item 5 in Step 1 above, select Monthly recurrence, set Every 1 Month, set On Day 1<sup>st</sup>, set End to None
7. Enter launch@surveyadvantage.com (#3 in image)
8. Change the subject to "Survey Launch File for <YOUR COMPANY NAME>" (#4 in image)
9. (OPTIONAL) Change the body of the email to something you like (#5 in image)
10. Check the box next to "Attached the report as an Excel file" (#6 in image)
11. Click Save and Close (#7 in image)

## Automation and Export Guide for QuickBooks Online

Your report is now set and scheduled to be sent to SurveyAdvantage so your customer feedback surveys launch automatically.