

Connecting QuickBooks Online

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Overview

If you use QuickBooks Online as your bookkeeping software, you'll be happy to know we have an integration between the two platforms! Once the integration is active, our system can automatically sync relevant contact, invoice, and payment information with QuickBooks.

If you are setting up QBO for the first time and want to make sure you are making the right choices for your business, please review our article about [QuickBooks Online Best Practices](#).



Before making any major business decisions, please consult with your accountant or bookkeeper.

This article will review:

- [Connecting Your QuickBooks Account](#)
- [When Do We Push Items to Quickbooks?](#)
- [Classes](#)
- [FAQs](#)

Connecting Your QuickBooks Account

To connect your serviceminder account to your QuickBooks Online account, go to **Control Panel > Integrations > Accounting**. Then click the **Connect** link listed in the QuickBooks Online section.

Integrations

Payments

Accounting

Marketing

Other

Publishing

Publish \$0 Invoices?

☒ Clear this option if you don't want \$0 invoices published

Publish Deposits?

☒ Clear this option if you don't want deposits published

Sync Credit Memos When

Created ▼

Payment Methods

[Manage...](#)

Accounting Classes

[Manage...](#)

Connect to QuickBooks Online

Status

[Connect...](#) or [Connect Via Another Organization...](#)

QuickBooks Desktop Options

You will be presented with a QuickBooks Online login dialog. Uncheck any options that don't apply to you then **Click** the green button.



QuickBooks Payments is for those that use QuickBooks for payment processing ONLY. Most likely, you will want to uncheck that box.

Connect to QuickBooks

QuickBooks Online	<input checked="" type="checkbox"/> Connect to QuickBooks Online to sync customers, invoices, payments and more
QuickBooks Payments	<input checked="" type="checkbox"/> Connect to QuickBooks Payments for optional credit card processing. If you do not use QuickBooks to process your credit card transactions, do not select this option.
Connect	<button>Connect to QuickBooks</button>

After you enter in your credentials, you will be given a prompt to grant permission to **serviceminder** to access your QuickBooks Online account. Once this is completed, you'll be returned to **serviceminder** and your account will be connected to QuickBooks Online.

Connect to QuickBooks Online

Status	You are currently connected to QuickBooks. Status , Disconnect
Push Customers Only	<input checked="" type="checkbox"/> If enabled, only contacts with customer typed categories will be pushed to QuickBooks Online
Add Contact ID to Name	<input checked="" type="checkbox"/> Enable this to always append the contact's unique ID to the end of their name when syncing to QuickBooks Online. Ensures the name is always unique in QuickBooks Online.
Import Payments	<input checked="" type="checkbox"/> Import payments recorded in QuickBooks Online
Default Income Account	<div>None ▼</div>

Default income account to use when adding parts to QuickBooks.

After connecting the sync, you will see the section appear under **Control Panel > Integrations > Accounting** tab.

Additional settings are offered:

- **Push Customers Only:** Selecting this option makes sure that leads and other users are not pushed into QB, which would clutter up your bookkeeping system. (Most Orgs choose to have this ON).



By default, **serviceminder** will automatically apply a **Customer** category to **Contacts** that are invoiced. However, there are settings at the Service-level that allow you to tell the system if when you want **Contacts** to be called **Customers** (though most owners leave this settings as default).

- **Add Contact ID to Name:** This makes sure financial information doesn't get crossed between customers with the same name. (Most Orgs choose to have this OFF).
- **Import Payments:** If you are using QBO payments "Swipe device" this allows for payments run on that device to sync back to SM. (Most Orgs choose to have this OFF).
- **Default Income Account:** In QBO you set up Income Accounts for accounting purposes, choosing the default account in SM on this page means if you create a service or part that doesn't exist in QBO, when the invoice syncs QBO will use that "default income account" to assign the funds in QBO. (Most Orgs choose to have this ON).

Any time you want to disconnect from QuickBooks Online, you can return to **Control Panel > Integrations > Accounting** and a disconnect link will be available.

As part of QuickBooks security and our own security compliance, **serviceminder** has **NO** visibility into your QuickBooks account.

When Do We Push Items to QuickBooks Online?

Anytime an invoice is generated (and approved), we publish that invoice to QuickBooks Online. If the customer doesn't exist in your QuickBooks Online account, we automatically push that customer info & any invoice to QuickBooks. Any services or parts that you add to serviceminder will be automatically added to your account when an invoice is pushed over. So don't worry if you don't see a part in QuickBooks Online yet if you haven't had an invoice that contained it.

Whenever a payment is recorded in serviceminder against an invoice, we'll push it over to QuickBooks. This includes write offs, credit memos, and refunds as well. You will still need to go into QuickBooks Online, periodically, to record actual bank deposits. Obviously, we can't automate this portion because we don't know the details of physical deposits. QuickBooks Online also doesn't have a mechanism that would let us generate the deposits.

There are two reports in serviceminder that relate to the QuickBooks Online sync:

1. **Invoice reconciliation**
2. **Payment reconciliation**

There is also a QuickBooks Errors snapshot that will tell you if something doesn't sync and the error reason.

Snapshots	
Pulse	
At a Glance	
Failed Payments	209
QuickBooks Errors	273
Open Invoices	943

Primarily the sync is only one way, from serviceminder to QuickBooks Online. The only exception to this is you can check the box on the integrations setup page that says "Import Payments". The primary reason for this is when a businesses is using QBO Payment Processing for credit cards. This "payment sync from QBO" makes it more convenient. (Buy why not user serviceminder|Pay instead?)

Classes

If configured, we can also push over accounting class information to both contacts and invoices. Note that QuickBooks Online must be configured to track classes and it must be configured to track "Per Transaction" and not "Per Transaction Row."

Accounting Classes can be configured in serviceminder via **Control Panel > Integrations > Accounting**, just above the QuickBooks section.

The **Mappings** tab allows you to assign accounting classes to contacts by Postal Code, or to assign a Default Accounting Class to all contacts within your organization. This is commonly used for locations that have more than one organization in serviceminder so that they can identify which organization the income came from in QuickBooks.

Accounting Class Mapping			Accounting Classes	Mappings
Postal Code	Cities	Accounting Class		
Default Accounting Class		Accounting Class 1 ▼		
78703	Austin	Accounting Class 1 ▼		
78704	Austin	--Select one-- ▼		
78731	Austin	--Select one-- ▼		
78741	Austin	--Select one-- ▼		
78746	Austin, Rollingwood, West Lake Hills, West Lake Hills	--Select one-- ▼		
84043	Lehi, Eagle Mountain, Eagle Mtn, Saratoga Spgs, Saratoga Springs	--Select one-- ▼		

FAQS

How do we fix duplications or incorrect payments not transferring between serviceminder and QuickBooks?

serviceminder is a one-way sync to QuickBooks; meaning things done in serviceminder end up in QuickBooks but not everything done in QuickBooks syncs to SM.

In most cases, we do not recommend using the **Import Payments** option from QuickBooks integration. That is specifically for card swipe tool from QuickBooks ACH and this can lead to issues if owners do not understand

exactly what it is for.

A payment made with that setting turned on for the card swipe tool will apply only if the invoice is already created in serviceminder. It is easy for CPAs or owners to be confused about how to apply those payments or link them within QuickBooks.

However, if you have direct payments into your bank account from your customers, then you may want to check that box since that means you don't have any actual payments you need to take and add to Invoices directly within SM.



Before making any major business decisions, please consult with your accountant or bookkeeper.
