

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](#)
- [Income Accounts](#)
- [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.

Connect to QuickBooks Online

Status

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

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

Connect to QuickBooks Online to sync customers, invoices, payments and more

QuickBooks Payments

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

Connect to QuickBooks

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

If enabled, only contacts with customer typed categories will be pushed to QuickBooks Online

Add Contact ID to Name

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

Import payments recorded in QuickBooks Online

Default Income Account

None

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?

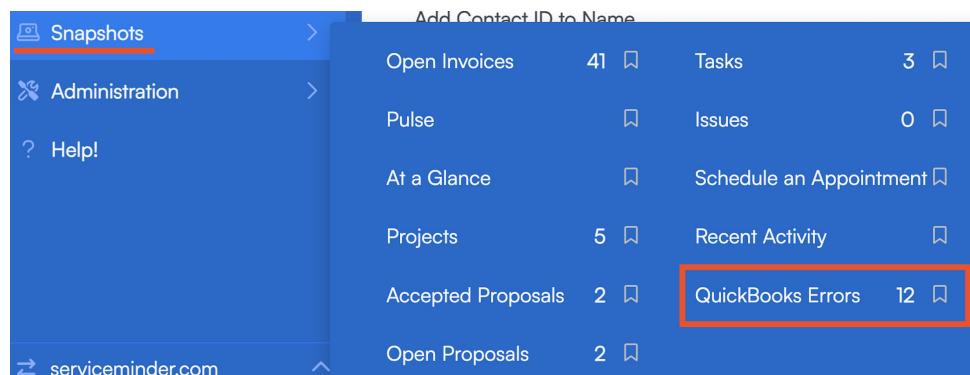
Anytime an invoice is generated (and approved), we publish that invoice to QuickBooks Online. If the customer doesn't exist in your QuickBooks Online account, we automatically push that customer info & any invoice to QuickBooks. Any services or parts that you add to serviceminder will be automatically 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**

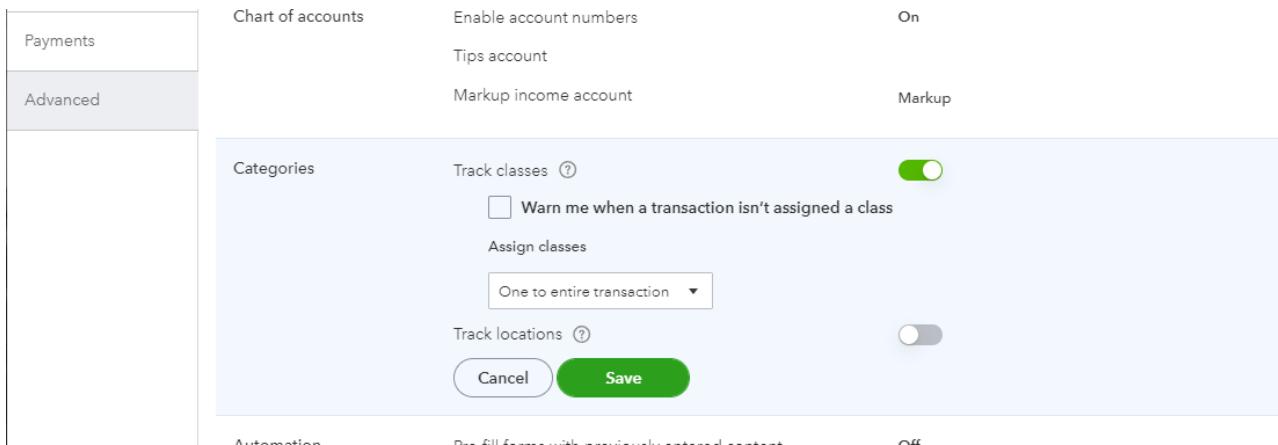
There is also a QuickBooks Errors snapshot that will tell you if something doesn't sync and the error reason.



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.

Payments [Accounting](#) Marketing Other Publishing

General Options

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...](#)

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		Plano ▾		
78721	Austin	Out of Territory ▾		

Income Accounts

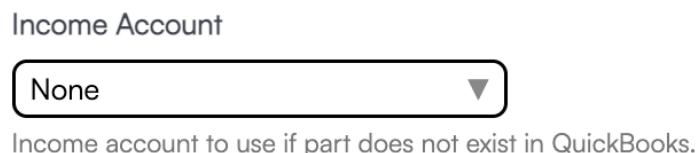
Income Accounts in ServiceMinder are fully controlled by QuickBooks Online. ServiceMinder does not create or

manage Income Accounts – instead, it displays the Income Accounts that already exist in the connected QuickBooks account.

- **One-time sync rule:** The Income Account field in ServiceMinder is only used the first time a Part or Service syncs to QuickBooks *and* only if that item does not already exist in QuickBooks.
 - If the item already exists in QuickBooks, QuickBooks will ignore the ServiceMinder Income Account setting and use whatever account is already linked in QuickBooks.
- **Default Income Account:** It is recommended to set up a **Default Income Account** when setting up your QuickBooks integration. Setting this up will ensure that any service or part created in serviceminder that doesn't exist in QuickBooks will use that default to assign the funds in QuickBooks when the invoice syncs.

Assigning Income Accounts

Once an organization connects the QuickBooks integration, the **Income Account** dropdown field appears on both **Services** and **Parts**. The dropdown will only show the Income Accounts that already exist in that org's QuickBooks and have synced over to serviceminder.



1. Edit the Service or Part in serviceminder.
2. Use the **Income Account** dropdown to select the appropriate account from QuickBooks.
3. Save your changes.

Bulk Updating Income Accounts

- **Parts** can be bulk-updated via CSV upload.
- **Services** must be updated manually.

FAQS

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

A: 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.

Q: If a brand connects QuickBooks but does not have a list of parts and services, will serviceminder automatically add them to QuickBooks when invoices sync, or should they be added manually in QuickBooks first?

A: If parts or services do not already exist in QuickBooks, they will be automatically added when used on the first invoice that syncs from serviceminder with that new part or service on it. This is the only time serviceminder will interact with QuickBooks to assign an "income account." After that, if no income account is selected in the dropdown in serviceminder, QuickBooks will automatically assign the service or part to the first income account in the list (in alphabetical order).
