QuickBooks Online Best Practices

Overview

While QuickBooks Online offers only a few configuration options for syncing with ServiceMinder, proper setup is essential. A well-configured connection prevents sync errors, reduces cleanup work, and ensures your financial data remains accurate. Before adjusting settings, always consult with your accountant, bookkeeper, or Franchise Business Consultant/Administrator (FBC/FBA). Your brand may also have a required process for connecting to QuickBooks.

This guide outlines common behaviors of the QuickBooks sync, when data flows between the systems, recommendations based on common support cases, and key cautions to keep in mind.

> **ℹ** Consult your accountant, bookkeeper or FBC/FBA before making any significant changes. Your brand may even have an SOP for you to follow when setting up your connection.

This article will review:
- About QBO Syncing
- When Data Pushes to QBO
- Recommendations
- Sending QBO Payments to ServiceMinder
- Caution

About QBO Syncing

The integration between ServiceMinder and QuickBooks is primarily **one-way**. Customer records, proposals, invoices, payments, and refunds created in ServiceMinder automatically push into QuickBooks during the sync process.

The only optional exception is the ability to send **payments entered in QuickBooks** back into ServiceMinder. No other QuickBooks data flows into ServiceMinder, and ServiceMinder does not have access to your QuickBooks account.

To connect, navigate to **Control Panel > Integrations > Accounting** and link your QuickBooks account. After syncing, all new customers, invoices, and payments will flow into QuickBooks automatically.

About One-Time Imports

If you want to import existing QuickBooks data into ServiceMinder, our team can initiate a **one-time sync**. This is not recommended for organizations already established in ServiceMinder, as it can create confusion and duplicate records.

If you do perform a one-time import, make sure **Add Contact ID To Name** is turned **off**, or you will create duplicate

contacts. This setting is found in **Control Panel > Integrations > Accounting > Connect 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

Transitioning from QuickBooks to ServiceMinder

If you're moving your invoicing workflow from QuickBooks into ServiceMinder:

1. Continue recording payments for **existing open invoices in QuickBooks**.

2. Begin creating **new invoices in ServiceMinder**.

3. Over time, migrate fully to ServiceMinder for invoicing and payment processing.

4. Use QuickBooks primarily for reconciliation, reporting, payroll, and tax preparation.

For common sync issues, see: **QuickBooks Online Common Errors**.

When Data Pushes to QBO

Contacts

When syncing contacts, ServiceMinder checks for an existing record in QBO by **name match.**

- If the names match, the existing QBO customer is used.

- If the names do not match, a **new customer** is created.

- If a customer already synced from ServiceMinder changes names, the update should reflect in QBO.

Merging Contacts

Merging contacts in ServiceMinder can disrupt invoice and payment associations in QBO. Before merging contacts with existing transaction history, consult your accounting team or brand administrator.

Customers Only

When enabling the integration, you can choose whether **all contacts** or **only customers** sync to QBO.
- Most organizations select **Customers Only**, so leads and prospects do not appear in QBO.
- A contact becomes a customer when their first invoice is generated.

If the "Push Customers Only" setting is **off**, *all* contacts sync to QBO regardless of invoice status. This setting should not be toggled on and off to affect only some contacts.

Push Customers Only

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

Deposits

Proposal deposits sync to QBO as **Undeposited Funds**, which is the **expected behavior**.

Once the proposal becomes an invoice, QBO automatically links the deposit to the correct invoice.

Invoice Numbering

Invoice numbering is critical for preventing data conflicts. Please be cautious when making any changes in **Control Panel > Invoices** to the **Invoice Number** or the **Invoice Number Template.**

Changing **Control Panel > Invoices > Invoice Number** or the invoice template can cause:

- Duplicate invoice numbers

- Overwriting of older invoices in QBO

If your QBO account contains prior invoices from before the sync, exercise extreme caution when adjusting invoice numbering in ServiceMinder.

Merging Invoices

Please be aware that merging invoices may affect records within your QuickBooks Online account. As an example, if the invoices have different service lines (the top lines may be Residential Install vs. Commercial Install), then it may update records that have already pushed over to QBO.

Please consult with your bookkeeper, accounting team, or brand administrator before making any major changes to your business processes either in ServiceMinder or QuickBooks Online.

Refunds

Refunds from ServiceMinder sync to QBO as **Expenses**, not QBO "refunds." This is expected and recommended behavior by QBO.

Why?

QuickBooks online essentially has 2 types of refunds: "**refunds**" and "**expenses**". A refund in QBO is handled more like a refund + write off in SM. It refunds the payment, but it also writes off the rest of the invoice and **prevents further payment**. Meaning QBO's version of a refund would not allow you to refund an accidental payment and

keep the invoice open to be paid again later.

So we push an "**Expense**" instead, and this is what QuickBooks officially recommended for this situation. This offsets the invoice by the amount you want to refund while still allowing room to keep the invoice open for later if needed. So there's no wiggle room for us to change this general syncing of refunds into QBO.

ServiceMinder refunds appear in QBO as **unapplied** and must be manually associated with the correct invoice or payment.

Recommendations

These suggestions are not a replacement for the advice of your financial professional. You should always consult with your accountant, bookkeeper, or other counsel before making changes that could affect your business.

Here are some general recommendations that may or may not be suitable for all brands or users.

1. Do not select "Import QuickBooks Payments" unless you are using QB payment processing (in which case, your incoming dollars are automatically recorded in QBO.)

2. Think carefully before asking the SM Support team to push over data from QBO to SM. In many cases, this creates confusion and complications.

3. Keep your eye on QBO errors. Here are common errors that you may get. It's easy to see QBO errors in the left navigation pane of service**minder**.

4. Don't be impatient! The service**minder** to QBO sync is NOT in real time. It may take several minutes (or longer, depending on the amount of users syncing with QBO). **It takes an average of 3 hours for updates to reflect in QBO, although some days it may take longer.**

5. Make sure your income accounts are set up properly in QBO, and then link your service**minder** Services to those income accounts. This way, you won't see revenue showing up in odd places in QBO.

Sending QBO Payments to ServiceMinder

If you determine that it is the most functional for you to sync payments made in QuickBooks Online into service**minder**, you would do the following:

1. Go to **Control Panel > Integrations > Accounting** tab.

2. And turn on the **Import Payments** feature.

Import Payments

☑ Import payments recorded in QuickBooks Online

3. Then click **Save**.

Caution

he most common issues arise when users continue working in both systems without committing fully to one workflow. To avoid discrepancies:

- Use ServiceMinder exclusively for **creating invoices and receiving payments** as soon as possible.

- Allow QBO to function primarily as your accounting system—reconciliation, financial reporting, taxes, payroll —not as your operational system.

- Establish a clear **cutover date** to transition fully to ServiceMinder.

- Use the **Payment Reconciliation Report** to validate your transition.

For more information, refer to **Common QuickBooks Questions.**