QuickBooks Online Common Errors

11/27/2024 12:46 pm CST

Overview

On this page we show some of the most commonly asked questions, QuickBooks Online Errors, and information on how to fix the issue to **Retry** the sync of the invoice or payment.

Because QBO is very protective over the date in their system (and rightly so!) there is very little that we are able to see and do on the service **minder** side. That usually means we cannot fix something directly for you, or even see much detail about what has gone wrong.

However, we have assembled some of the more common QuickBooks errors our Users have encountered.

Settings and Navigation

To first diagnose the issue, you need to view what the Error says. You can find a list of **QuickBooks Errors** in the left-hand panel under **Snapshots**. If you don't have any errors, this will not show or you may see a 0.

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

You will be on the **Publishing Status / Publishing Errors** page. This details what has gone wrong. In the below example, the payment and the Invoice error are actually the same thing. It is most likely that the tax rates aren't set up properly in the system. If that is corrected, all of the corresponding errors should be fixed. This will be removed from the list after clicking **Retry**.

7/1/2024 12:46p	7/1/2024 4:36p	Invoice	Bodie Kahuna (Woody.)	unable to find tax rate with name 'Collin County-Plano-TX'	<u>Retry</u> <u>Clear</u>
7/1/2024 12:45p	7/1/2024 4:33p	Payment	Bodie Kahuna (Woody)	Unable to locate invoice 4978 for payment 12451079. Please make sure invoice 4978 has synced to QBO first.	<u>Retry</u> <u>Clear</u>

QBO Sync for Payments and Write-Offs

If you add payments or write-offs in QBO (outside of SM) those will push over to us from QBO as payments.

If this is an error and the payments aren't real, you can **Delete** them. Or your Brand Admin can delete them for you, or you can send a Support ticket and we can delete them on your behalf.

Then you can also write off the invoices in SM, but that may mess up QBO if something was already done on that side. But in SM, deleting the payments and writing off the invoices is the best way to handle it.

Common Errors

Validation Exception was thrown.Details:Invalid Reference Id : Categories cannot be used in transactions

• QuickBooks - Error: Categories cannot be used in transactions

It is because you have an Item Ref set for either the Booking Type, one of the Additional Services, or a Products added to a booking, that is *category identifier*. QuickBooks does list Category Names in the Item Reference list but does not let you use them.

What this means is, behind the scenes, QBO stores both categories and items in the same table for whatever reason. If you have a category and a part with the same name, service**minder** searches for the part name, but sometimes QBO gives us the category. This gives this error since you can't use a category as a line item.

Check if one of these items is also a category in QBO and then rename the category.

If the QBO Tax Rate Name dropdown is empty.

If you cannot select anything from that dropdown, that means the QBO tax rate table is also probably blank. If so, that means the error is on the QBO side. Try creating a dummy invoice to push over and that normally helps trigger the QBO rates coming back to service **minder**.

	QuickBooks Tax Rate Name	Select one V
		Matches this tax rate to an equivalent rate in QuickBooks Online
QuickE	Books Online Tax Rates	
Nam	e Rate	Components

Using an integrated tax service, but some QuickBooks tax rates are not mapped properly.

• QuickBooks - Error: Unable to find tax rate with name XXX

We call this "mapping" of the QBO tax rate to the named tax rate in serviceminder and this will fix the issue.

- 1. Go to Control Panel > Invoices > Manage tax rates
- 2. Click Edit on the tax rate that is showing the error on the page, for example King County-SeaTac-WA
- 3. In the drop-down for QuickBooks Tax Rate pick the tax rate QuickBooks calls it and then save
- 4. Go to your QuickBooks errors page and click Retry on the invoice
- 5. Then click Retry on the payment

This will re-sync the invoice and payment and resolve the issue. Do the same steps for any of the unmapped rates that are receiving errors.

Edit Tax Rate		
Name*	King County-SeaTac-WA	
Active?		
Tax Rate*	10.1 %	
QuickBooks Tax Rate Name	Select one	Ŧ
	Matches this tax rate to an equivalent ra	ate in QuickBooks Online. If left unmapped, invoices with this tax rate may not sync properly to QuickBooks.

Error: Duplicate Document Number

If this Validation Exception was thrown, you must specify a different number. This number has already been used. DocNumber=xxxx is assigned to TxnType=Invoice (or possibly Credit Memo) with TxnId=xxxx. The preference in resolving this issue is for the owner or bookkeeper to change the number on the QBO side of things.

Typically, this only happens if you have a unique numbering system used in the past and SM just happens to use that same number (Example: 12345). It is highly unlikely, but completely possible, that service**minder** may assign something and use that exact #.



The offending number in QBO is what should change in this scenario. Keep in mind that the number can be on a **Credit Memo** or **Write Off** in QBO as well, not just **Invoices**.

We have found that owners can't find it because they've only searching invoices, not those write offs or credit memos. We would advise to search everything that has a document number, not just invoices. QBO checks for conflicts across all items.

Once those numbers have been changed in QBO, then the owner can go back into SM and to those QB errors and hit retry and those errors should clear once those numbers have been updated.

To help prevent this in the future, you can go into **Control Panel > Integrations > Accounting** tab and select the option to add **Contact ID to Names**. That way it makes it more difficult for the systems to accidentally duplicate.

How Can I Prevent This?

So just like service**minder**, QBO assigns document numbers automatically. Sometimes SM and QBO will have a random matching numbers. There really isn't a way to avoid this since both numbers are automatically generated on the back end. Usually it is a invoice number that is a duplicate on the QBO side and was probably a number from previous dealings prior to using service**minder**.

Which means the only solution is for you to add a number or letter to the QBO to update.

Error Code 401

Typically Unauthorized-401 means the username (email) or password for the QBO account is wrong, To fix this,

disconnect QBO from serviceminder and reconnect it.

This error code happens because the password for QBO had been updated or that the connection may have become invalid or interrupted for some reason. If you can go to **Control Panel > Integrations** to the QuickBooks section, **Disconnect** and **Reconnect** again, that will hopefully solve the problem. Then you can retry those failed syncs.

Unable to Locate

For the "unable to locate" error, the payment can't sync over because the invoice isn't syncing first. Once the invoice is able to sync, the payment will sync over.

Object reference not set to an instance of an object error

First solution is to click **Retry**. Normally just a connection issue, so this was a temporary instance where SM couldn't connect to QBO when the sync tried to happen.

Validation Exception was thrown. Details: This transaction has been deposited

Click Retry to clear it.

Validation Exception was thrown.Details:The account period has closed and the account books cannot be updated through through the QBO Services API. Please use the QBO website to make these changes.

This error code is thrown due to the fact that the QBO reporting period has been closed. So in other words, the books have been closed for that period - typically done by the accountant after taxes have been done. They will need to speak with their accountant on opening the books back up for that period for transactions to sync over.

Validation Exception was thrown.Details:Invalid Reference Id : An item in this transaction is set up as a category instead of a product or service

This means that one of the line items on the invoice that's being synced over shares a name with a Category inside QBO. QBO stores both Items and Categories inside the same table, so sometimes when syncing a line item, it will get confused and find the Category, and we aren't able to differentiate which is which. To resolve this issue, look at the line items on the invoice that failed, find the Category in QBO that has the same name and rename it.

Error regarding Account Period

This error occurs when a transaction (Invoice) that is trying to sync to QuickBooks Online (QBO) is dated in a period that is closed in QBO. You need to open your accounting periods to allow the transaction to sync (in QuickBooks). Once that's adjusted you can click **Retry** on those in SM.

FAQs

What do I do if I don't see the specific error code on this list?

- 1. Google the QuickBooks error to learn more sometimes that is what we have to do.
- 2. Ask your accountant/bookkeeper for assistance.
- 3. Or you can send a Support ticket to see if there are ways we can assist. However, we do not have access to your QBO account, therefore, our help is extremely limited.

If you have more questions, please review Common QuickBooks Questions.

We have a couple customers that are in ServiceMinder but info is not showing up in QBO, so the invoice and payment information is not going from ServiceMinder to Quickbooks online.

There is a chance that there was a disruption of some sort. Check the invoices to see if there is a **Publish** option. Usually you only need to click Publish if the invoices were created before being connected to QBO. You will know the payment is unpublished if it shows the "Publish" button and shows no status in QBO. If QB was connected but it was unsuccessful in the attempt there would be QB errors and an option to Retry.

It is always a good idea to go and make sure that the QBO sync is still connected (Control Panel > Integrations > Accounting). You can always try disconnecting and reconnecting.