Accounting Classes

12/18/2024 2:07 pm CST

Overview

Accounting classes are ways that include royalties with owned territories for a more comprehensive end of period reporting. Usually, the service**minder** team sets this up for the brand during onboarding. If you have a new franchisee onboard with you, you can submit a support ticket requesting that we set up the accounting classes for them.

Some brands prefer to handle this in house, if so, here are the steps to get you going.

Settings and Navigation

You can allow Owners or other Users to access this section at the brand-level. The accounting class edit permissions for orgs is found in **Dashboard > Configuration**.
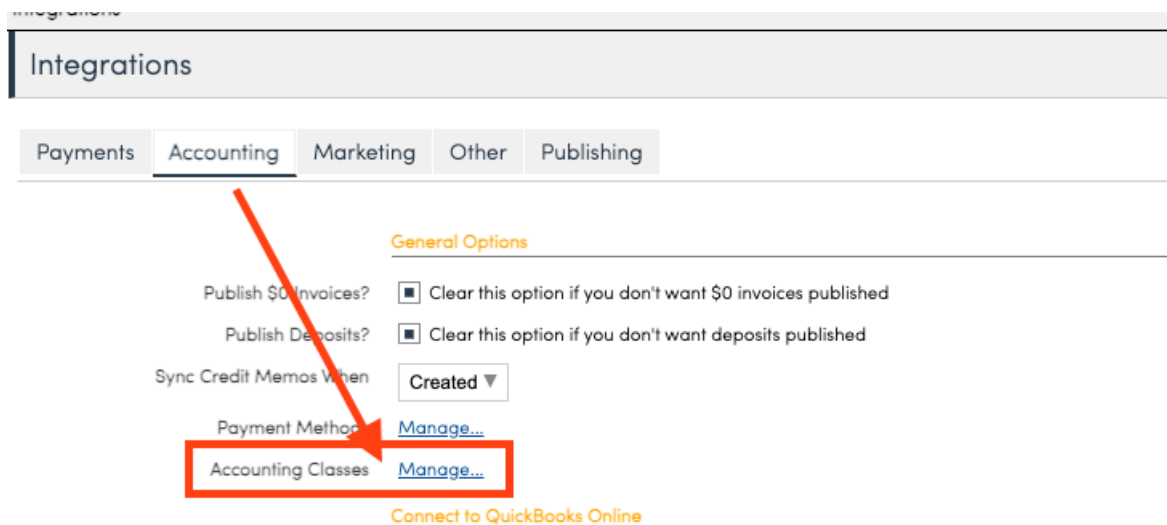

Set Up

In **Control Panel > Integrations**, under the Accounting tab you'll see **Accounting Classes.** Click "Manage...".

Here you can set up accounting classes that will sync over to QuickBooks Online and help designate the right territory for your contacts.

Click **Add**, then add the **Name** and the **Class**, and click **Save**.

In order to map the accounting classes to specific zip codes, you'll need to first have zips added to your organization (your "owned" postal codes.)

Adding Owned Postal Codes

If you need to do that part, go to **Dashboard > Tools** tab **> Organizations > Edit** the org in question. You will need to add the any new postal codes to the box at the bottom for Owned Territory.

Mapping

There are two ways to map your accounting classes to zip codes.

After the class is created, you can click the pencil on its details page by Postal Codes to add the zips for that class, separated by commas. Only owned zips will save.

Want to create GeoZones for your classes? If you add zips to the class on the first page, you can click the +GeoZone button to immediately create geozones that match your classes, with the right zips codes, named the same as your class.

Once that's done, if you click over to Mappings you'll see the zip codes have the accounting class auto-selected.

You can also skip to this step, click on Mappings, and manually select the class from your drop down. Any owned zips that aren't already on the class (from clicking the pencil) will be here for you to designate a class.

You can also set a Default class in Mappings.

FAQs

Does this work for Canadian Postal Codes?

Yes, but if you try to create a GeoZone for some of the larger territories, it may be too large to function within the SM system. For instance, if you try to filter based on a zone that has 300 postal codes, it is trying to pull so much info that the page could freeze without being able to load all of the data at once.

Troubleshooting

When selecting accounting classes, I have to go through 100+ postal codes, is there an easier way?

You can copy and paste the zips (separated by commas) directly into the accounting class. Go to CP > Integrations > Accounting tab > Manage. Add new or click on the existing location you want to update, then click the Pencil icon to edit and drop zips in there.

Edit Mapped Postal Codes

Postal Codes

Accounting Class | ██████████████

Name ██████████████

Active? Yes

Contacts 0

Created ██████████████

Updated ██████████████

Postal Codes ✏