



**MAINTENANCE
COMPANION**

We Trim Your Admin

Connection Guide

Quickbooks Connection Guide

Connecting via QuickBooks' API

QuickBooks API

An API (Application Programming Interface) is a standardized way for one software application to talk with another. The API connection between Maintenance Companion and QuickBooks allows the two systems to securely share information eliminating the need to enter data twice.

By linking the applications, property and customer details created in Maintenance Companion are automatically sent to QuickBooks.

When invoices are generated from work orders, the invoice data can flow directly into QuickBooks, so your invoices are prepared and ready to send with no extra steps.

This connection follows a secure, defined set of rules that ensures both systems stay accurate and aligned. As a user:

- You only need to enter information once.
- Your data stays consistent across both applications.
- You save time and reduce the chance of errors.

To connect the applications, there is an authorization process to grant access.

1. Share Desktop Access


I will share access to my desktop using Chrome Remote Desktop.

When we need to log into QuickBooks, this will enable you to control my Desktop and to enter your login details.

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2. Create a connection

 QuickBooks - Add Connection ⓘ

Connection Name * ⓘ

Connection Authorization Level *

Administrators
Allow only the administrators to authorize

Logged-in users
Allow any logged in user of the application to authorize

Use this credentials to enable access to *

All Actions Only Specific Actions

View Selected

Account

- Create Account
- Fetch a account record
- Fetch all account records

Use different authorization for each environment

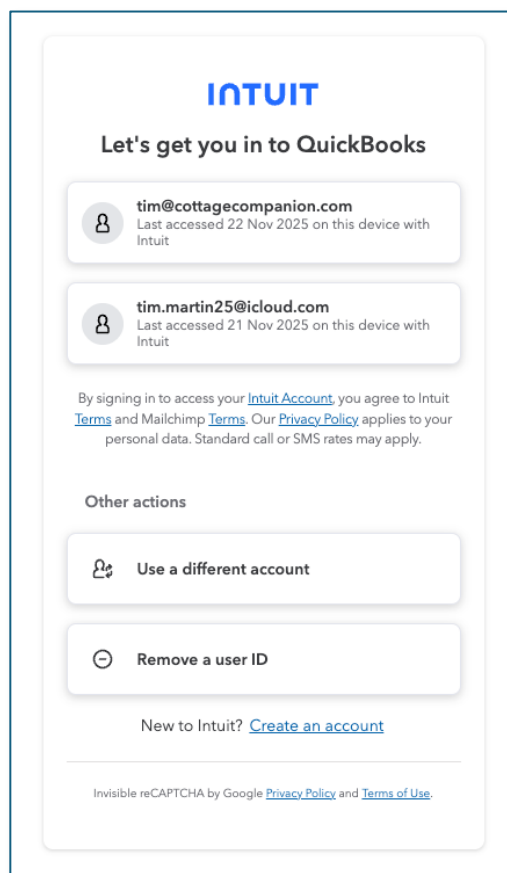
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3. Authorize Connection

We will share the desktop connection so that you can enter a username and password for QuickBooks.

If you have the QuickBooks licences available, you can create a user dedicated for API access. This would allow you to have a different user linked to updates from Maintenance Companion.



Important Note:

We do not store a copy of your username or password.

Once authorized, we have an encrypted token that provides the application access.

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4. Confirm Connection

Connect to Zoho Creator: step 1 of 2



Welcome, tim.martin25@icloud.... ([Not You?](#))



Connecting Zoho Creator
to MC Test Inc

By selecting **Connect**, you agree that we can share your QuickBooks Online data with Zoho Creator, and that Zoho Creator can share your data with us, including as described below. To learn more, see our [Terms of Service](#) and [Global Privacy Statement](#).

[Show details about data](#) ▾

No thanks

Connect

Your relationship to Zoho Creator and its use of your data are also subject to Zoho Creator's [terms](#) and [privacy statement](#).
Disconnect Zoho Creator anytime from your apps overview page.

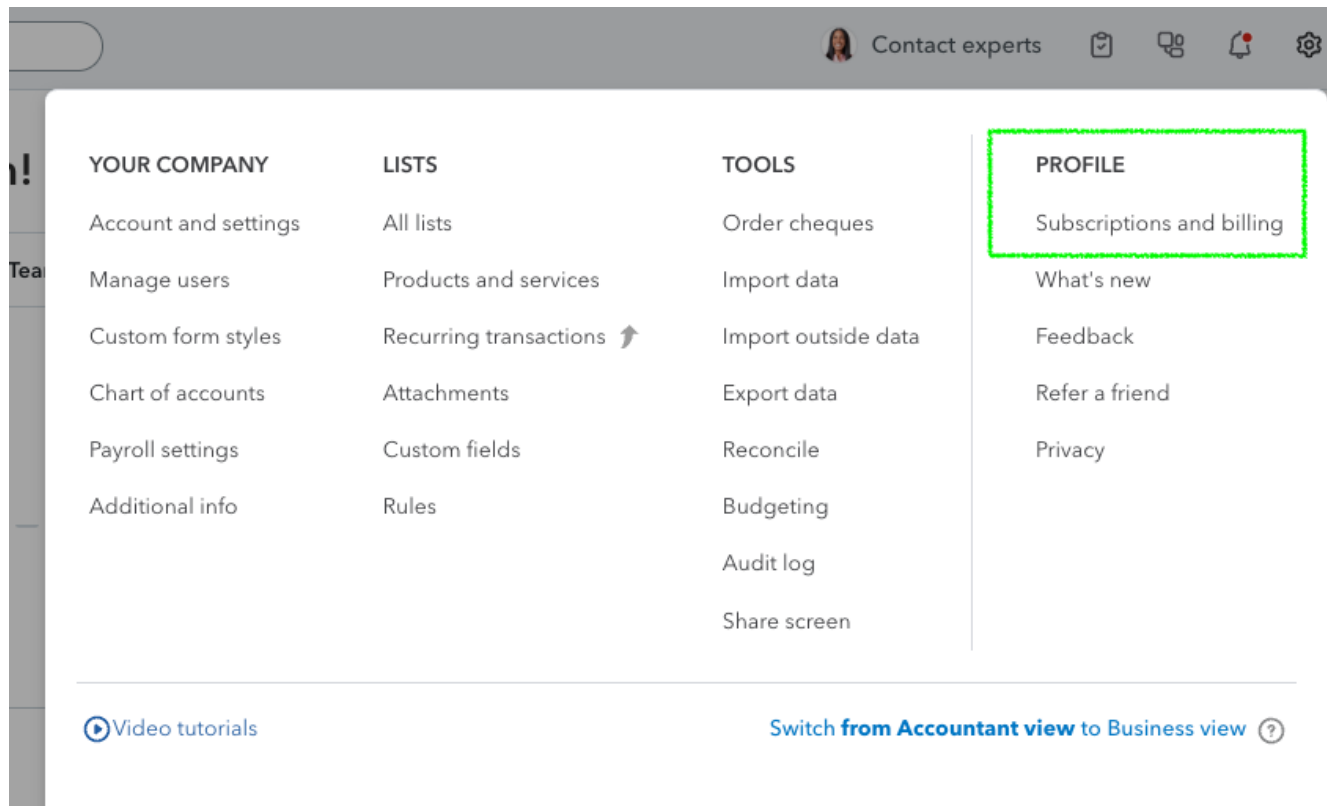
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5. Get Company ID from QuickBooks



This available from the Settings > Subscriptions and Billing option in QuickBooks.

6. Test the Connection

Once connected, we can quickly perform a test to ensure the connection is working correctly.