



**MAINTENANCE
COMPANION**

We Trim Your Admin

QuickBooks API Connection & Sync Guide

QuickBooks API Connection & Sync Guide

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. Connecting to QuickBooks

To link Maintenance Companion to your QuickBooks account:

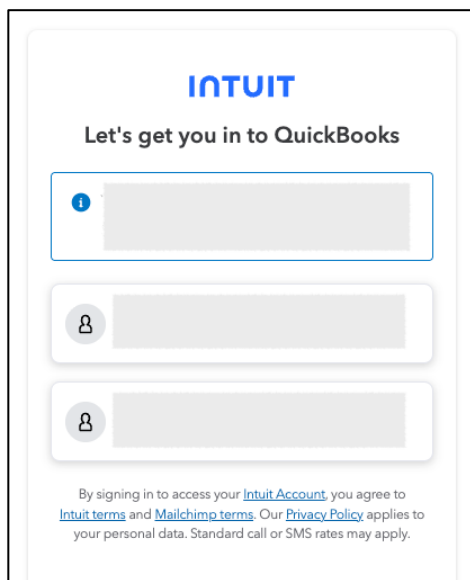
- Navigate to Admin > Company Settings.
- Click on the Sync with QuickBooks button at the top right.
- A summary and sync page will be displayed with your current connection status.

The screenshot shows the QuickBooks API connection interface for 'Lakefront Property Maintenance'. The interface is divided into several sections:

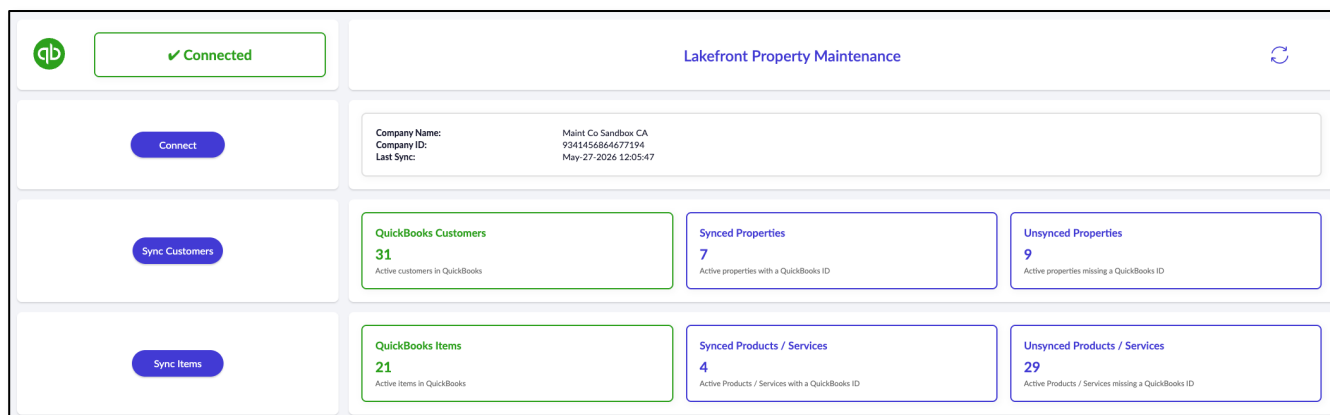
- Top Left:** A 'Disconnected' status indicator with a red 'x' icon and the text 'Please use the Connect button to authorize the connection.'
- Top Right:** The company name 'Lakefront Property Maintenance' and a refresh icon.
- Middle Left:** A 'Connect' button.
- Middle Right:** A form with fields for 'Company Name:', 'Company ID:', and 'Last Sync:'.
- Bottom Left:** A 'Sync Customers' button.
- Bottom Middle:** A summary box for 'QuickBooks Customers' showing 'Not Connected' and 'Active customers in QuickBooks'.
- Bottom Right:** Two summary boxes for 'Synced Properties' (7) and 'Unsynced Properties' (9), both showing 'Active properties with a QuickBooks ID'.
- Bottom Left (Lower):** A 'Sync Items' button.
- Bottom Middle (Lower):** A summary box for 'QuickBooks Items' showing 'Not Connected' and 'Active Items in QuickBooks'.
- Bottom Right (Lower):** Two summary boxes for 'Synced Products / Services' (4) and 'Unsynced Products / Services' (29), both showing 'Active Products / Services with a QuickBooks ID'.

QuickBooks API Connection & Sync Guide

- Click the Connect button.
- You will be redirected to the official QuickBooks login page, hosted and operated by Intuit.



- Once you have signed in, QuickBooks will ask you to confirm that you are happy to grant Maintenance Companion access to your account. After you approve, you can continue in Maintenance Companion, and your connection will be active.



Note :

Your credentials are safe. You will be entering your username and password directly on Intuit's website.

Maintenance Companion never sees, handles, or stores your QuickBooks login details. This is the same secure sign-in page you would use to log in to QuickBooks directly.

QuickBooks API Connection & Sync Guide

2. Synchronizing Your QuickBooks Data with Maintenance Companion

Maintenance Companion links your QuickBooks data to three key areas:

QuickBooks	Maintenance Companion
Customers	Properties
Items	Products & Services
Employees	Team Members

How the Linking Process Works

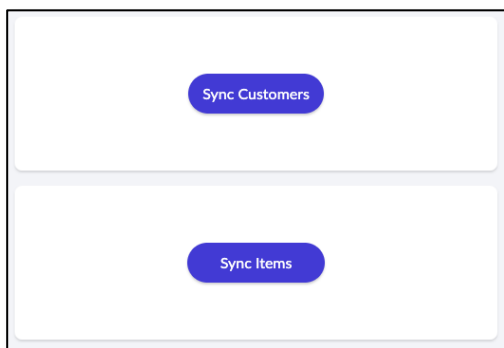
When you set up your company in Maintenance Companion, you can connect your existing QuickBooks data rather than entering it again from scratch. All three areas above follow the same process.

For each area, Maintenance Companion retrieves your QuickBooks records and displays the full list, so you can see everything that is available. For each record, you then choose one of the following actions:

- **Import** — creates a new record in Maintenance Companion using the QuickBooks data.
- **Link** — connects the QuickBooks record to an existing record you have already created in Maintenance Companion.
- **Refresh from QuickBooks** — where a link already exists, this updates the Maintenance Companion record with the latest version from QuickBooks.
- **Exclude** — marks the record as not relevant, so it is ignored during synchronisation. This is useful for QuickBooks records that do not apply to your Maintenance Companion setup.

Sync Customers / Items / Employees

Select one of the Sync buttons on the QuickBooks page to bring up details for synchronization.



QuickBooks API Connection & Sync Guide

Initially you will need to select the Refresh button to get the latest data from QuickBooks.

This can be repeated at any time and the page will remember any previous actions.

The right hand panel is for reference to help with any linking. It shows unlinked entries in Maintenance Companion.

Refresh Customers with QuickBooks

1. Refresh: Sync the latest list from QuickBooks by clicking 'Refresh Customers with QuickBooks'.

2. Select Action:

- Import: Create a new property record from the QuickBooks customer.
- Link: Connect the customer to an existing property.
- Update from QuickBooks.
- Exclude: Ignore this customer; no record will be created or linked.

3. Process Records: Tick one or more rows and select 'Process Records'.

Unlinked Properties: This list shows any properties in Maintenance Companion that have not been linked to a QuickBooks Customer.

Action	QB Customer	Property	Last Sync Time
Done	Abercrombie International Group	Abercrombie International Group - Abercrombie International Group	12-May-2026 10:44:21 AM
Update from QB	Adwin Ko	Adwin Ko - Ko International Ltd	
Done	Alex Blakey	Alex Blakey - Blakey Group	12-May-2026 01:00:00 PM
Import	Andre Prefontaine		
Import	Anilkumar Pillai		
Done	Benjamin Yeung	Pine House - Pine House	
Import	Cathy's Consulting Company		
Import	Chadha's Consultants		
Import	Cheng-Cheng Lok		
Import	Clement's Cleaners		
Done	Ecker Designs	Ecker Designs - Ecker Designs	
Import	Froilan Rosqueta		
Import	Hazel Robinson		
Import	Himateja Madala		

Showing 29 of 29

Property Name
Airport Lodges
Flying Monkeys
Marina House
New Lodge
Pink Property
Port Sandfield Marina
Shore Front House
Sunshine Lodge
Turtle Jacks

Showing 9 of 9

This process is primarily completed during your initial company setup. However, you can return to the linking pages at any time — for example, if you add new Customers, Items, or Employees in QuickBooks after your initial setup.

After the Sync Process

Once you have Imported / Linked and Updated Customers and Items from QuickBooks, review the Properties and Products and Services in Maintenance Companion.

- **Properties** — review the new properties to check the addresses and other details are complete.
Before the first billing cycle the Billing Category should be set.
- **Products / Services** – review the invoice method for the services. If a Unit Price existed in QuickBooks, it will be marked as Fixed Price else the entry will be marked as Hourly / Subcontractor.
The tax codes also need to be set for each product / service before an invoice can be created.
There is a bulk update option to set the values.

QuickBooks API Connection & Sync Guide
