



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:

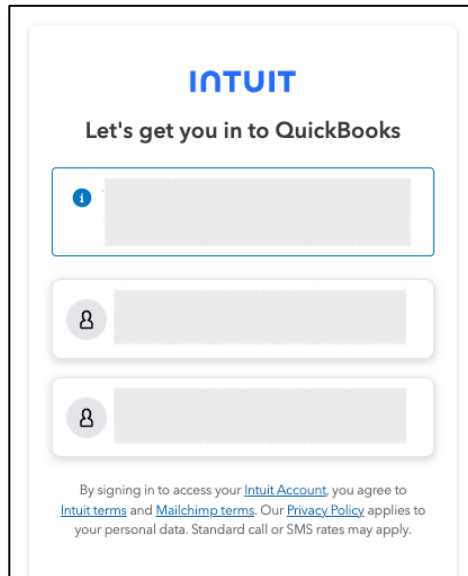
- Navigate to Admin > Company Settings.
- Click on the Sync with QuickBooks button at the top right.
- A summary and sync page will be displayed with your current connection status.

The screenshot shows the Maintenance Companion interface for 'Lakefront Property Maintenance'. The top left corner features the QuickBooks logo and a 'Disconnected' status with a message: 'Please use the Connect button to authorize the connection.' Below this are three buttons: 'Connect', 'Sync Customers', and 'Sync Items'. The main content area displays the connection status for three categories: Customers, Properties, and Products/Services. Each category has a 'Not Connected' status and a summary of active items.

Category	Status	Active Items	Items Missing QuickBooks ID
QuickBooks Customers	Not Connected	Active customers in QuickBooks	Active properties missing a QuickBooks ID
Synced Properties	7	Active properties with a QuickBooks ID	9
Synced Products / Services	4	Active Products / Services with a QuickBooks ID	29

QuickBooks API Connection & Sync Guide

- Click the Connect button.
- When you connect Maintenance Companion to QuickBooks, the app opens a new window to Intuit's login page so you can sign in and authorize the connection.



If nothing happens when you click "Connect to QuickBooks," check your browser's pop-up settings using the steps below.

Enable pop-ups for QuickBooks connection

Google Chrome

1. Click the icon in the address bar that looks like a pop-up blocked (small window with an X), or open Settings > Privacy and security > Site settings > Pop-ups and redirects.
2. Under "Not allowed to send pop-ups," find portal.maintenancecompanion.tech (or click "Add" and enter it).
3. Move it to the "Allowed to send pop-ups and use redirects" list.
4. Refresh the page and try connecting to QuickBooks again.

Safari

1. Open Safari > Settings (or Preferences) > Websites > Pop-up Windows.
2. Find portal.maintenancecompanion.tech in the list, or set "When visiting other websites" to Allow if the site isn't listed yet.
3. Set it to Allow.

QuickBooks API Connection & Sync Guide

4. Refresh the page and try again.

Mozilla Firefox

1. When the pop-up is blocked, a notification bar appears at the top of the page — click "Options" (or the pop-up icon in the address bar) and choose "Allow pop-ups for portal.maintenancecompanion.tech."

2. Alternatively, go to Settings > Privacy & Security > Permissions > Block pop-up windows > Exceptions, and add portal.maintenancecompanion.tech to the allowed list.

3. Refresh the page and try connecting again.

Microsoft Edge

1. Click the pop-up blocked icon in the address bar, or go to Settings > Cookies and site permissions > Pop-ups and redirects.

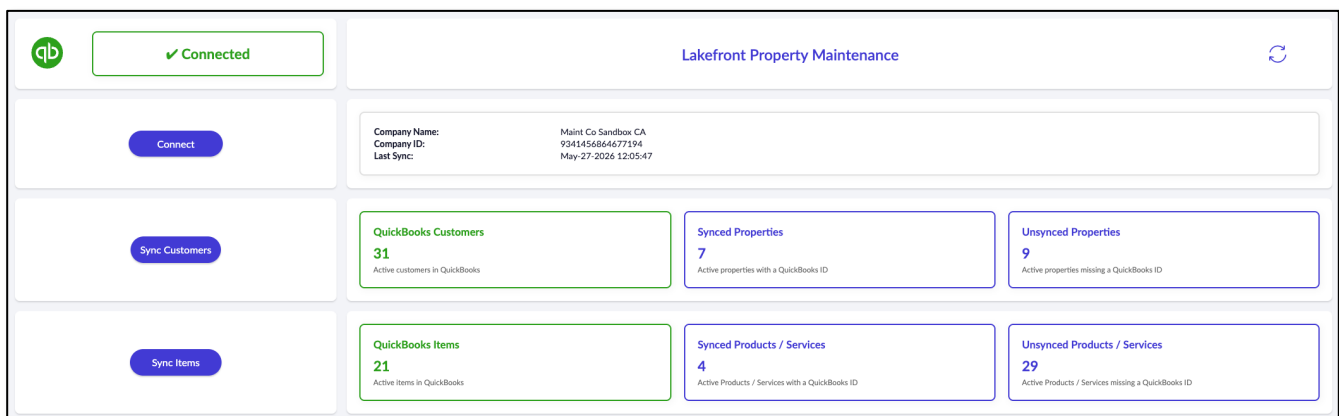
2. Under "Allow," add portal.maintenancecompanion.tech.

3. Refresh the page and try connecting again.

Tip: If you still don't see the QuickBooks login window after allowing pop-ups, check that no browser extension (ad blocker, privacy tool) is also blocking it, and try again in a private/incognito window to confirm.

Confirm Access in QuickBooks

- 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 :

QuickBooks API Connection & Sync Guide

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.

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.

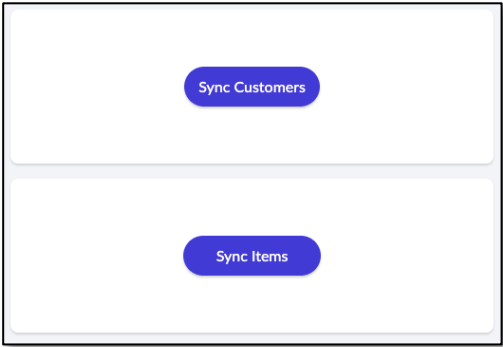
For each area, Maintenance Companion retrieves your QuickBooks records and displays the full list, so you can see everything that is available. For each record, you then choose one of the following actions:

- **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:

o Import: Create a new property record from the QuickBooks customer.

o Link: Connect the customer to an existing property.

o Update from QuickBooks.

o Exclude: Ignore this customer; no record will be created or linked.

3. Process Records:

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

Quickbooks Customer Import

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

Unlinked Properties

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.

QuickBooks API Connection & Sync Guide

- **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.