Syncing With QuickBooks Online

Important Information for using QuickBooks

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Using QuickBooks with Rate Remover

Rate Remover connects to your QuickBooks Online account so closed invoices flow into your books automatically. Once you sign in, you don't have to push anything by hand. Every invoice you close in Rate Remover shows up in QuickBooks within seconds.

Before You Connect

You'll need an active QuickBooks Online subscription and admin access to the company file you want to sync with. Rate Remover doesn't work with QuickBooks Desktop.

Connecting QuickBooks

Open Rate Remover, go to Configuration, and find the Intuit QuickBooks card. Click Sign In to Intuit/QuickBooks. A new tab opens to Intuit's secure sign-in page where you log in with your QuickBooks credentials and choose the company file you want to connect.

When you finish, the tab shows an "Intuit Connected" confirmation card and tells you it's safe to close. Rate Remover updates in the original tab to show the connection is active. If something went wrong, the tab shows an "Intuit Connection Failed" card instead. In that case, close the tab and try again, or contact support if the failure repeats.

You only have to do this once per company file. Rate Remover stores a secure token, refreshes it on its own every night, and you won't be asked to sign in again unless you disconnect or QuickBooks explicitly revokes the connection.

What Syncs and When

Rate Remover sends a closed invoice to QuickBooks the moment it's marked closed in Rate Remover. That includes invoices closed after a successful card payment through Dejavoo, invoices closed manually from the invoice screen, and invoices updated after they've already been closed.

Open invoices, estimates, and drafts do not sync. Once an invoice is closed and visible in QuickBooks, any future edits you make in Rate Remover are pushed up to QuickBooks as updates to the same record.

Vehicles, jobs, technicians, parts inventory, and appointments do not sync. Only invoices, the customers attached to them, and the payments recorded against them.

How Invoices Appear in QuickBooks

Each Rate Remover invoice creates a corresponding invoice in QuickBooks. QuickBooks assigns its **own document number** using your QuickBooks numbering scheme, so the entry will look like any other QuickBooks invoice in your records. Rate Remover keeps a private link between the Rate Remover invoice and its QuickBooks counterpart so future edits update the same record rather than creating duplicates.

Every line item on the Rate Remover invoice becomes a line on the QuickBooks invoice. Today, Rate Remover routes all line items to a single income account in your chart of accounts called Rate Remover. If that account doesn't already exist, Rate Remover creates it for you on the first sync. The line items themselves are stored as QuickBooks items named RR Labor, RR Parts, RR Miscellaneous, RR NTNF, RR General, and similar.

How Customers Appear in QuickBooks
When Rate Remover syncs an invoice for a customer who isn't already in QuickBooks, it creates a new QuickBooks customer record. The customer's first and last name come straight from Rate Remover. To keep records unique and easy to match later, Rate Remover sets the Display Name to a combination of the customer's name plus a Rate Remover identifier, and the Company Name to that identifier. You'll see entries that look like "John Smith RR-672f43d1..." in the QuickBooks customers list.

The billing address, city, state, and ZIP from the Rate Remover customer record are also populated. If a customer with the same Rate Remover ID already exists in QuickBooks, Rate Remover reuses that record rather than creating a duplicate.

How Payments Are Recorded
When an invoice is fully paid in Rate Remover and there's at least one recorded payment, Rate Remover also creates a matching payment in QuickBooks and links it to the invoice. The payment type maps as follows:

- Card payments become Credit Card
- Cash, write-off, and "other" payments become Cash
- Check payments become Check

The payment amount in QuickBooks matches what was charged in Rate Remover. If an invoice was paid by multiple methods, each becomes its own payment record in QuickBooks, all linked to the same invoice.

Sales Tax
Rate Remover applies QuickBooks' default tax code to each taxable line. QuickBooks uses your existing sales tax setup to calculate and route the tax amount to the correct liability account. Non-taxable lines are marked as non-taxable.

If you don't have sales tax configured in QuickBooks, you'll want to set that up directly inside QuickBooks before connecting Rate Remover so the tax routing has somewhere to land.

Card-Paid vs. Cash-Paid Invoices
If you use dual pricing, your invoice line items show one price for cash and a slightly higher price for card. Rate Remover always sends the price that matches how the invoice was actually paid:

- A card-paid invoice syncs at the card price, so the QuickBooks total matches what your customer was charged on their card.
- A cash, check, or other-paid invoice syncs at the cash price.
- An open or partially paid invoice syncs at the card price by default and updates when the payment is finalized.

Because card-paid invoices in QuickBooks reflect the full amount charged, the difference between what you see in QuickBooks and what actually lands in your bank account from your merchant services provider is the card fee that the processor deducts before deposit. That gap is reconciled against your merchant services statement, not inside Rate Remover.

Keeping the Connection Alive

Rate Remover refreshes your QuickBooks connection automatically every night, so you don't need to sign in again periodically. If a refresh ever fails (for example, if you change your QuickBooks password in a way that revokes the connection, or if you disconnect Rate Remover from inside QuickBooks), your invoices will stop syncing and you'll need to reconnect from the Configuration screen. Support can confirm whether a sync failure is connection-related.

Disconnecting QuickBooks

To stop syncing, go back to Configuration, open the Intuit QuickBooks card, and click Disconnect Intuit/QuickBooks. You'll be asked to confirm. Existing invoices, customers, and payments already in QuickBooks are not deleted or modified. Only new and updated invoices stop flowing.

You can reconnect at any time from the same screen.

Frequently Asked Questions

Can I choose which QuickBooks income account my invoices go to?
Not yet. All Rate Remover invoices currently route to a single income account called Rate Remover. Per-category mapping is on our roadmap.

Why do my customer names have a long code on the end?
The code is a unique Rate Remover identifier that lets us match the same customer between systems without creating duplicates. You can hide or rename customer records inside QuickBooks if the display name bothers you, but please don't change the Company Name, which is what we use to match.

An invoice didn't sync. What do I do?
First, confirm the invoice is closed in Rate Remover. Open invoices and estimates don't sync. Then confirm the QuickBooks connection is still active under Configuration. If both are good and the invoice is still missing, reach out to support and include the Rate Remover invoice number.

Will my old invoices sync if I connect QuickBooks for the first time today?
No. Only invoices closed or updated after the connection is made flow to QuickBooks. Historical invoices stay where they are.

Do refunds sync?
Refunds processed through Dejavoo are reflected in Rate Remover, but refund records do not currently flow into QuickBooks as separate transactions. You'll want to record refunds in QuickBooks manually for now.

I disconnected QuickBooks and then reconnected. Will my old synced invoices update again if I edit them in Rate Remover?
Disconnecting clears the internal link between Rate Remover invoices and their QuickBooks counterparts. After reconnecting, if you edit an invoice that had already been synced before the disconnect and Rate Remover tries to push the update, it may create a new QuickBooks invoice rather than updating the original. If you need to disconnect and reconnect, talk to support before editing already-synced invoices so we can avoid duplicates.