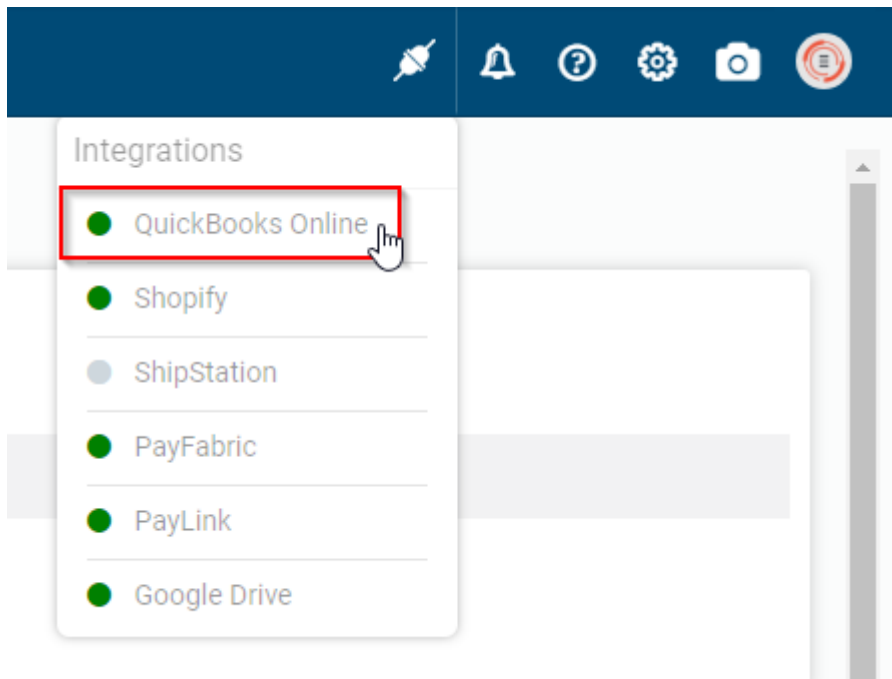# QuickBooks Online Integration

Megan De Freitas - 2025-06-10 - Integrations

QuickBooks Online

After initial setup and integration, SalesPad Cloud and QuickBooks Online transfer data back and forth every ten minutes. Below, you will find detailed infomormation pertaining to that integration.

To view either integration history or pending exports to your QuickBooks Online account, click the corresponding tab on the QuickBooks Online integration page, which you can access by selecting QuickBooks Online from the Integrations dropdown in the upper right-hand corner.

For a quick visual representation of what happens when you integrate QuickBooks Online with SalesPad Cloud, check out this diagram:

SalesPad Cloud
- Sales Order Processing
- Customer Payments — A/R
- Purchasing & Receiving
- Inventory Management
- Assemblies

Data sent to QBO
- Invoice, Sales Receipts, Returns, Refunds with Customer & Items (Journal Entry)
- Purchase Receipt with Vendor and Items (Vendor Bill)
- Payments/Deposits on Customer or Sales Transactions (Journal Entry)
- Inventory Adjustments (Journal Entry)

10 Minutes

Data sent to SalesPad Cloud
- Chart of Accounts
- Tax Setup
- Payment Method

QBO
- Accounts Payable
- Payroll
- General Account Functions
- Financial Reporting
- Non-Inventory Related Purchases and Expenses
- Sales Tax Reporting

Data Pulled from QuickBooks Online into SalesPad Cloud

When you connect SalesPad Cloud to QuickBooks Online, data is imported into SalesPad Cloud in the following order:

- Company Settings
- Classes
- Chart of Accounts
- Locations
- Tax
- Payment Terms
- Item Masters
    - Items marked as inactive in QuickBooks Online will integrate to SalesPad Cloud if they've ever been sold on a transaction in QuickBooks Online.
    - If you have inventory and quantity tracking turned on in QuickBooks Online, that information will transfer to SalesPad Cloud upon initial integration. The integration runs the inventory valuation summary report from QuickBooksOnline to determine the average cost for each item, which is calculated by dividing the asset value by the quantity. SalesPad Cloud creates the items with this cost and uses the valuation method assigned to that item moving forward. The items are automatically adjusted into SalesPad Cloud's inventory via an adjustment in transaction that is posted to QuickBooks Online.

- If you aren't tracking inventory in QuickBooks Online but have items set up, they will import into SalesPad Cloud with the same Item Type they had in QuickBooks Online. If you want to track quantities for any of those items, though, they will need to be changed to the Inventory Item Type in SalesPad Cloud.
- Customers
- Vendors
- Sales Documents
  - Estimates import as Read Only.
  - Invoices, Sales Receipts, Refunds, and Returns import as Read Only and Historical. They will be marked as paid or unpaid.

Transactions and Data that Sync to QuickBooks Online

The following is a quick overview of transactions and data that sync to QuickBooks Online. Check out the QuickBooks Online integration map for more specific details on how your data is integrated across these two powerful platforms.

Sales Invoice/Sales Receipt/Sales Return/Sales Refund Receipt

These transactions will be sent over to QuickBooks Online only when posted. The user will see a copy of the SalesPad Cloud document in QuickBooks Online, but all line items, even if they are inventory-tracked items in SalesPad Cloud, will be marked as non-inventory. The transaction journal enty for these transactions will typically be debiting Cash or Accts Receivables and crediting Sales. There should not be any entries for Inventory or Cost of Goods Sold for these transactions. To handle those entries, SalesPad Cloud sends over a corresponding journal entry for Inventory and COGS, either decreasing or increasing your inventory value based on the type of transaction that has been posted (Sales vs. Return/Refund). When a retun is created in Cloud, if money is going back to the customer, a Refund Receipt will be created in QBO when the return is posted in Cloud. If a return is created in Cloud and the money is NOT going back to the customer, a Credit Memo is created in QBO when the return is posted in Cloud. Refunds created in Cloud are created as Refund Receipts in QBO.

Payments/Deposits

Payments in SalesPad Cloud will be synced with QuickBooks Online when attached to a posted sales transaction, at which point they will be reflected on that sales transaction within QuickBooks Online. Deposits, when saved, will sync a journal entry to QuickBooks Online debiting the undeposited funds account and crediting the SalesPad Cloud deposit account (unless the setting has been changed to a different account in SalesPad Cloud). Once the sales transaction that the deposit is associated with has been posted, there will be an additional journal entry for the deposit that debits the deposit account and credits the receivables accounts.

Purchasing Transactions

In SalesPad Cloud, there are two types of purchasing transactions: purchase orders and purchase receipts. SalesPad will only send posted purchase receipts to QuickBooks Online, which will show up as a vendor bill. Purchase orders will never sync to QuickBooks Online. The vendor bill will show the account lines but will not populate the item lines. The account lines will be based on each line item received, using the asset account specified either on the item master or in the company setup. The description of each line will show the item received, the quantity received, the unit cost, and the unit of measure used for that line on the receipt.

Inventory Transactions

SalesPad Cloud allows users to adjust inventory quantities either in or out of the system using inventory adjustments. Once posted, these adjustments will be synced over to QuickBooks Online as journal entries, either debiting or crediting the inventory asset account and then using a SalesPad Cloud inventory variance account to balance the journal entry.

Stock Counts

Once stock count has been executed and posted in SalesPad Cloud, the result is that one or more journal entries will be created for variances between the physical count and the system count. These journal entries will either debit or credit the inventory asset account and using the inventory variance account to balance the journal entry.

Assemblies

Posting assembly transactions will result in two journal entries, one for adjusting out the raw materials and one for adjusting in the assembled product. The journal entries will be created exactly as if the user had manually created the inventory in/out transactions within SalesPad Cloud, either debiting or crediting the inventory asset account and then using a SalesPad Cloud inventory variance account to balance the journal entry.

Customers/Items/Vendors

SalesPad Cloud does not sync every customer, item, or vendor to QuickBooks Online. We only sync this data once the customer, item, or vendor appears on one of the transactions mentioned in this document. For example, a new customer that has been added to SalesPad Cloud will not sync to QuickBooks Online until a sales invoice or receipt has been posted for that customer.

Account Class

SalesPad Cloud will attempt to locate any existing Account Classeses with matching names but no QuickBooks ID. Account Class data is integrated upon first time usage on inventory transaction lines, journal entries, purchase receipt lines, and sales lines. After initial integration, updates to Account Classes are not exported.

SalesPad Cloud	QuickBooks Online
Inactive	Not Active
Accout_Class_Name	Name
Parent_Account_Class_ID	Parent Account Class
Full_Name	Fully Qualified Name

Account

SalesPad Cloud will attempt to locate any existing Account with a matching name but no QuickBooks ID. Account data is updated when used on journal entries, purchase receipt lines, and sales lines. Newly created accounts are also integrated after being created.

SalesPad Cloud	QuickBooks Online
Inactive	Not Active
Account_Name	Name
Is_Subaccount	SubAccount
Description	Description
Full_Account_Name	Fully Qualified Name
Parent_QBO_ID	Parent Account
Account_Type	Account Type
Account_Subtype	Account Subtype
Account_Num	Account Number

If there is no setting in QuickBooks Online for Default Cogs Account, Default Asset Account, or Default Income Account, SalesPad Cloud will use the first QuickBooks Online account that fits the following criteria:

Default Cogs Account

- Account Type: Cost of Goods Sold
- Account Name: Cost of Goods Sold

Default Asset Account

- Account Type: Other Current Asset
- Account Subtype: Inventory

Default Income Account

- Account Type: Sales Of Product Income
- Account Name: Sales of Product Income

Assembly Transaction

Assembly transactions are integrated when posted.

SalesPad Cloud	QuickBooks Online
Post Date	Transaction Date
Document Number	SalesPadCloudAdj
Lines	
Amount	Amount
Description	Description
Account	Account
Warehouse	Location
Class	Class
Customer or Vendor by ID	Entity Ref

Contact

Contact data is transferred upon initial integration.

SalesPad Cloud	QuickBooks Online
Title	Title
First Name	Given Name
Middle	Middle Name
Last Name	Family Name
Suffix	Suffix
Address.Address 1..5	Line 1..5
Address.City	City
Address.State	Country Subdivision Code
Address.Zip	Postal Code

Address.Country	Country

Currency

Currency data is transferred upon initial integration.

SalesPad Cloud	QuickBooks Online
Currency Name	Name
Currency Code	Code

Customer

SalesPad Cloud will attempt to locate any existing Customer with the same Customer_Name as the QuickBooks Display Name, whether or not they have a QuickBooks ID. Customer data is transferred upon initial integration.

SalesPad Cloud	QuickBooks Online
Customer Name	Display Name
Company Name	Company Name
Customer Notes	Notes
Payment Terms	Terms
Parent Customer	Parent Customer
Payment Method	Payment Method
Bill With Parent	Bill With Parent
Contact/Shipping Contact	
Title	Title
First Name	Given Name
Middle	Middle Name
Last Name	Family Name
Contact Name	Contact Person
Suffix	Suffix
Address.Address 1..5	Line 1..5

Address.City	City
Address.State	Country Subdivision Code
Address.Zip	Postal Code
Address.Country	Country

Inventory Transaction Line

Inventory transaction line data is transferred when posted.

SalesPad Cloud	**QuickBooks Online**
Doc Number	SalesPadCloudAdj
Extended Cost (*per line*)	Amount
Line Sequence	ID (**2 and the next match up*)
SalesPad Cloud Transfer (*plus descriptor*)	Description
Description and Notes	Private Note

Item Master

SalesPad Cloud will attempt to locate a matching Item Master with the same name as the item in QuickBooks. Item Master data is transferred upon initial usage on a sales document.

SalesPad Cloud	**QuickBooks Online**
Inactive	Not Active
Item Number	Name *or* Parent Name : Item Name
Item Description	Description
Uofm	*defaulted in*
Parent QBO ID	Parent Ref
Asset Account	Asset Account
Cogs Account	Cogs Account
Expense Account	Expense Account
Income Account	Income Account
Taxable	Taxable

List Price	Unit Price
Purchase Cost	Purchase Cost
Purchase Description	Purchase Description
Item Type	Item Type
Valuation Method	FIFO
Sku	Sku
Inventory Levels	*Inventory Valuation Summary Report-driven*

Note: SalesPad Cloud treats COGS and Inventory Asset Items from QuickBooks Online as accounts, not as items. For inventory-tracked type items from QuickBooks Online, SalesPad Cloud creates an inventory record for those items upon integration. Any item created in SalesPad Cloud will be exported to QuickBooks Online as a non-inventory item.

Journal Entry

Journal entry data is transferred when posted.

SalesPad Cloud	QuickBooks Online
Memo	Private Note
Journal Date	Txn Date
Lines	
Amount	Amount
Description	Description
Account	Account
Warehouse	Location
Class	Class
Customer or Vendor by ID	Entity Ref

Location/Warehouse

Location data is transferred upon initial usage.

SalesPad Cloud	QuickBooks Online
Warehouse Name	Name

Inactive	Not Active
Full Warehouse Name	Fully Qualified Name
Parent Warehouse	Parent Warehouse

Payment Deletion

Any deleted payments in QuickBooks Online are also deleted in SalesPad Cloud.

Payment

Payment data is transferred on the payment post date.

SalesPad Cloud	QuickBooks Online
Payment_Date	TxnDate
Transaction_Status	TxnStatus
Entity/Type	Customer (if set)
Payment Method	Payment Method
Payment Ref Num	Payment Ref Num
Unapplied Amount	Unapplied Amount
"Paid"	Transaction Status
Transaction Amount	Total Amount
Lines	
Payment Applications	Payment Line Details
Unapplied Amount	Payment Line Amount
Payment Target	Payment Line Linked Transaction

Note: Customer Aging and Sales Document payables are updated whenever a payment is received.

Payment Method

SalesPad Cloud will attempt to locate Payment Method names that exist but don't have a QuickBooks ID.

SalesPad Cloud	QuickBooks Online
Inactive	Not Active

Credit Card *if set*	Payment Type
Payment Method	Name

Payment Term

SalesPad Cloud matches Payment Terms by name.

SalesPad Cloud	QuickBooks Online
Inactive	Not Active
Payment Terms	Name
Discount Amount	Discount Percent
Date Driven	
Due Before Day Of Month	Day of Month Due
Discount Day Of The Month	Discount Day Of Month
Next Month Due Cut Off Day of the Month	Due Next Month Days
Standard	
Due Num	Due Days
Discount Num	Discount Days

Purchase Receipt

Purchase Receipt data is transferred after posting.

SalesPad Cloud	QuickBooks Online
Purchase Receipt Number	Doc Number
Post Date	Transaction Date
"Received By SalesPad Cloud"	Private Note
Payment Terms Driven Due Date	Due Date
Vendor	Vendor
Warehouse	Department
Lines	

Taxable	Tax Code
Extended Cost	Amount
Item Number, Item Description, Qty, Uofm	Description
Inventory *or* Expense Account, Dropship *if applicable*	Account Line Detail
Class	Class

Note: Purchase Receipt lines are sent from QuickBooks Online to SalesPad Cloud as accounts with a description, much like journal entries.

Core Sales Document

Estimates, sales orders, invoices, sales receipts, returns, and refunds all use core sales document mapping. Data is exported to QuickBooks Online when posted and imported when the document was either not created in SalesPad Cloud, does not have SalesPad Cloud Customer as a name, or has 'Voided' in the Private Note field.

SalesPad Cloud	QuickBooks Online
Sales Doc Num	Doc Number
Post Date	Txn Date
Customer	Customer
Deposit To Account	Deposit To Account
Warehouse	Department
Account Class	Class
Payment Terms	Sales Term
Tracking Number	Tracking Number
Notes	Private Note
Memo	Customer Memo
Due Date	Due Date
Total	Total Amount
Open Amount	Balance
Apply Tax After Discount	Apply Tax After Discount

Tax	Total Tax
Tax Code	Tax Code
Shipping Method	ShipMethod

Billing/Shipping Contact

Title	Title
First Name	Given Name
Middle	Middle Name
Last Name	Family Name
Contact Name	Contact Person
Suffix	Suffix
Address.Address 1..5	Line 1..5
Address.City	City
Address.State	Country Subdivision Code
Address.Zip	Postal Code
Address.Country	Country

Lines

Shipping Amount	Shipping Item Value
Unit Cost	:cogs or :inventory asset lines
Extended Price	Amount
Item	Item
Qty	Qty
Item Description	Description
Taxable	Tax Code 'Tax'
Sales Document Discount	Discount Line Amount (*or* Percent)
Sales Document Subtotal	Subtotal Line Amount

Export Only

Payment Account	Deposit To Account
Discount	Discount Line
Shipping Amount	Shipping Line