

Tech Tip Tuesday—February 23, 2021

Tying a Company to a QuickBooks Customer

When you close out a trip billed to a customer account, that invoice appears in QuickBooks under that customer as an accounts receivable, so you know you still need to get paid.

When you close out a trip that is charged to a credit card, the sales receipt moves over to QuickBooks, but typically there is no QuickBooks customer tied to the transaction, since you don't need one—you already charged the card!

However, sometimes you might have a particular client for whom you want to see all their transactions in QuickBooks, regardless of how they pay.

In a previous Tech Tip ([November 28, 2017](#)) we covered how to tie an individual contact record in Livery Coach to a QuickBooks customer (company), so that all transactions booked by that contact, including credit card trips, will be tied to that customer in QuickBooks.

But sometimes it's not just a particular contact, but an entire Company in Livery Coach that you want to tie to a QuickBooks company.

In that scenario, simply navigate to Setup->Maintain->Company List.

If you have already created any other settings for that Company, it will already exist in the list—if not, simply click New at the bottom and then find the Company in the drop-down. (At least one contact with this company name must already exist in your system—if not, you must create it first.)

The screenshot shows a software interface with a top navigation bar containing tabs: "Add & Edit", "Rate Agreements", "Payment History", "Private Notes", "Pickup / Dropoff History", "Contact Notes", "Billing Instructions", and "Company Emplo...". The main form area includes the following fields and controls:

- Company Name:** A dropdown menu is open, displaying a list of companies: Temple University (highlighted), US Army, US Government, Van Halen, West Coast Farm Company, White House, and Wilmington Blue Rocks. A mouse cursor is over the list.
- Display Sign:** A text input field.
- Parent Company:** A dropdown menu.
- Chaufeur Airport Sign Logo:** A text input field.
- Confirmation Override:** A dropdown menu with a help icon.
- Confirmation Logo:** A text input field.
- Receipt Override:** A text input field.
- Rate Agreement Name:** A text input field.
- Sales Rep:** A dropdown menu.
- Region Name:** A dropdown menu.
- Hourly Pricing Option:** A dropdown menu set to "System Default".
- Source:** A dropdown menu.
- Gratuity:** A text input field with "-1" and a note "(Use -1 on Gratuity as Default)".
- Copy of Confirmation Email:** A text input field.
- Web receipt email:** A text input field.
- Other Vendor Names Or Codes:** A text input field with a note "(Each Name or Code follows with a comma (,))".
- Show Rate On Confirmation:** A dropdown menu set to "Default".
- Always assign this group name when agents for this company book:** A dropdown menu.
- QuickBooksOnline Customer Account:** A text input field.
- All Sales Receipt write to this QuickBooks Customer:** A text input field with a cyan highlight and a button to the right.
- Currency Symbol:** A dropdown menu.

At the bottom of the form, there are four buttons: "New", "Save", "Remove", and "File Attachment". A red arrow points from the "Company Name" dropdown menu down to the "All Sales Receipt write to this QuickBooks Customer:" field.

Once created, go to the "All Sales Receipt write to this QuickBooks Customer:" menu item at the bottom, click on the button to the right of the field, and find the desired QuickBooks customer.

The screenshot shows a software interface with a 'Company List' window and an 'Account Search' dialog box. The 'Company List' window has a 'General' tab and a search bar. Below the search bar is a table with columns: Company Name, PO Required, Display Sign, Hour Pay Option, Region Name, Private Notes, Sales Rep, and Ra. The table lists several companies, with 'Temple University' highlighted in blue. Below the table are tabs for 'Add & Edit', 'Rate Agreements', 'Paymethod History', and 'Private Notes'. The 'Add & Edit' tab is active, showing fields for 'Company Name' (Temple University), 'Display Sign', 'Parent Company', 'Chauffeur Airport Sign Logo', 'Confirmation Override', 'Confirmation Logo', 'Receipt Override', 'Rate Agreement Name', 'Sales Rep', 'Source', 'Copy of Confirmation Email', and 'Web res alert email'. There is also a field for 'Other Vendor Names Or Codes'. Below these fields are 'Show Rate On Confirmation' and 'Always assign this group name when agents for this company book' dropdowns. A red box highlights the text 'All Sales Receipt write to this QuickBooks Customer:' followed by a dropdown menu showing 'QuickBooksOnline Customer Account'. A red arrow points to the dropdown arrow. At the bottom are 'New', 'Save', 'Remove', and 'File Attachment' buttons. The 'Account Search' dialog box is open, showing 'Account Search (1)' with a search term 'temp' and a 'Retrieve' button. The 'Account Search Results' table shows one result: 'Temple' with 'Temple University' as the name. The dialog has 'OK', 'Close', and 'Help' buttons.

Once you selected what you want, you will see it in the blue text.

This is a close-up screenshot of the dropdown menu from the previous image. The text 'All Sales Receipt write to this QuickBooks Customer:' is followed by a dropdown menu. The dropdown menu is open, showing 'QuickBooksOnline Customer Account' at the top and 'Temple' selected below it. The selected item 'Temple' is highlighted in blue. To the right of the dropdown menu is a small button with three dots. Below the dropdown menu is a 'Currency Symbol' dropdown menu.