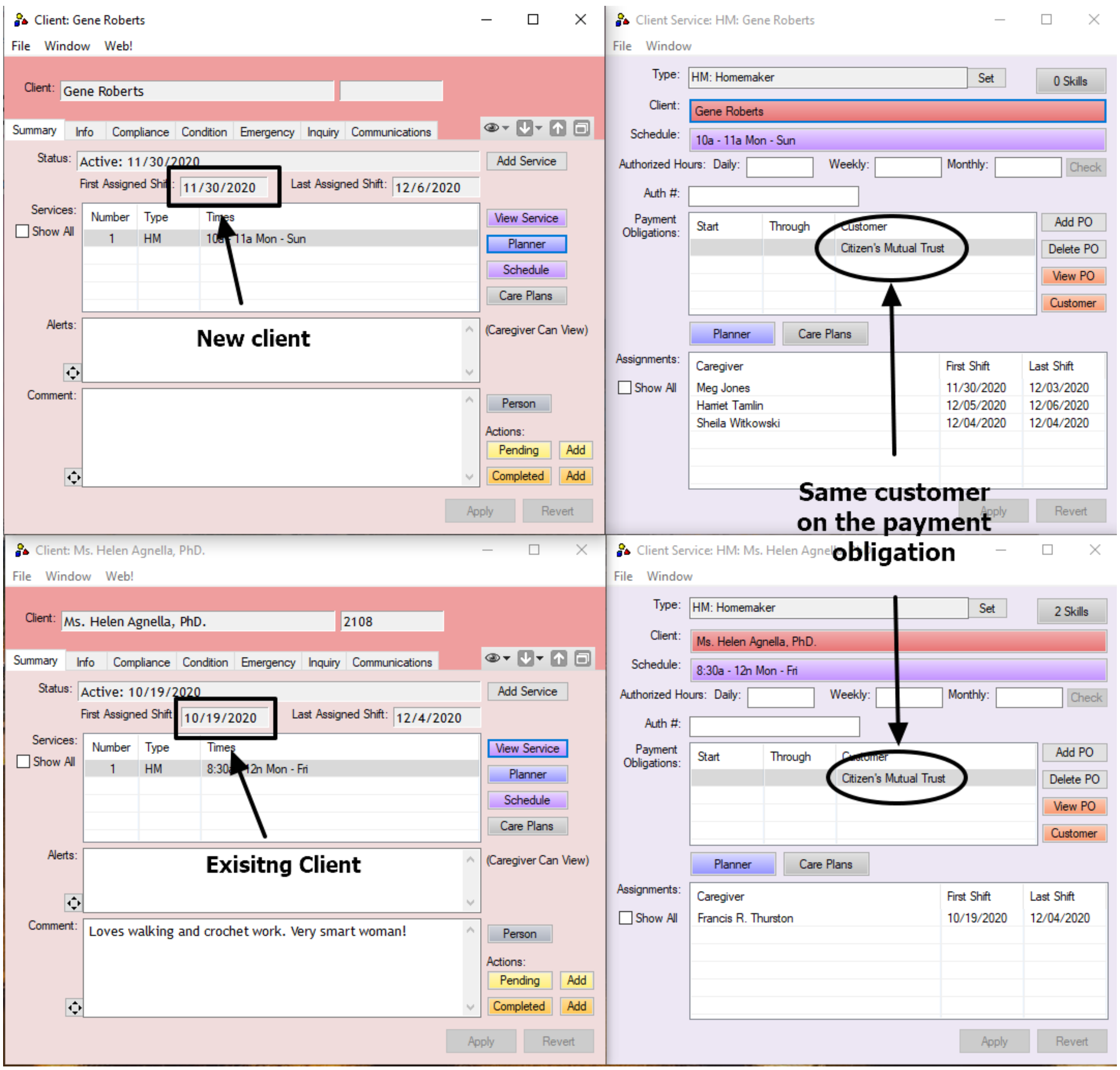
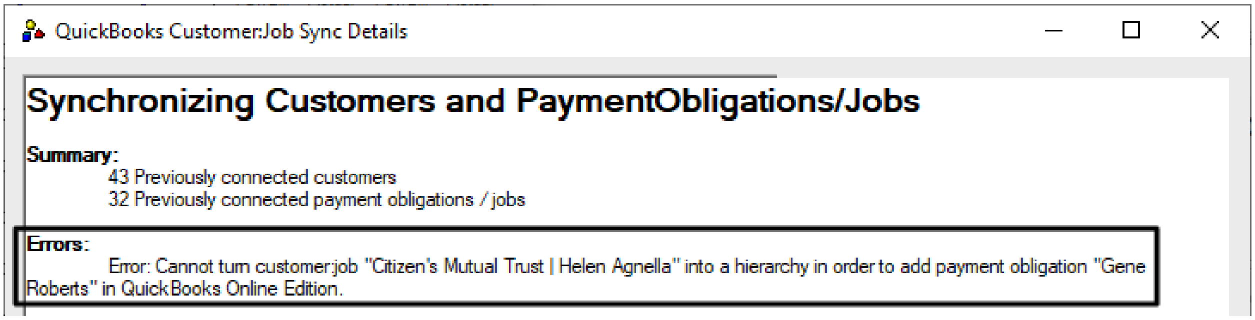
Resolving QuickBooks Online Edition (QBOE) Hierarchy Errors

The Problem - Unlike QuickBooks Pro, QuickBooks Online Edition (QBOE) has trouble adding new client sub-jobs to an existing customer. In the example below you can see clients Gene Roberts and Helen Agnella.



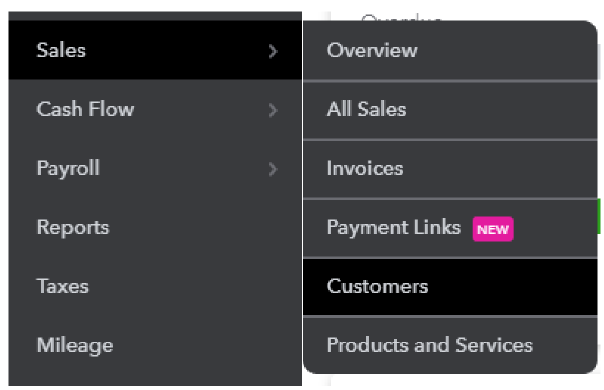
Helen is an existing client who has been billed to Citizen's Mutual Trust for the past several billing cycles, **Gene is a new client** who just started service and also needs to be billed to Citizen's Mutual Trust.

When doing a customer sync with QBOE the following error message appears:



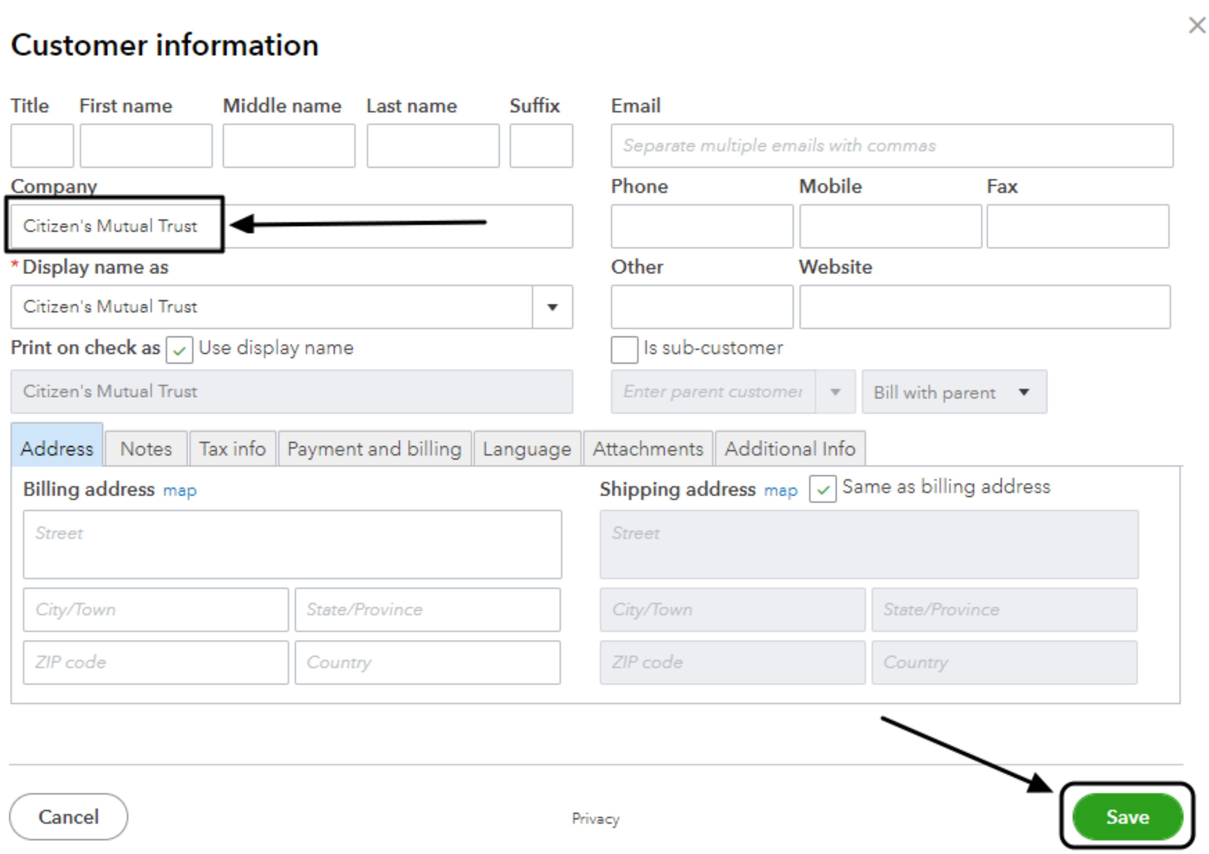
The Solution – Follow the steps below and adjust the profiles in QBOE to allow Rosemark to send over the client sub-job and establish a correct hierarchy in QBOE. It should look like the image on the right:

1. Use the navigation bar on the left of the page and to go Sales > Customers to bring up the customer list.

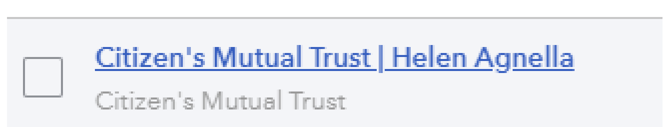


2. **Press the 'New customer' button** in the upper right corner of the customer list

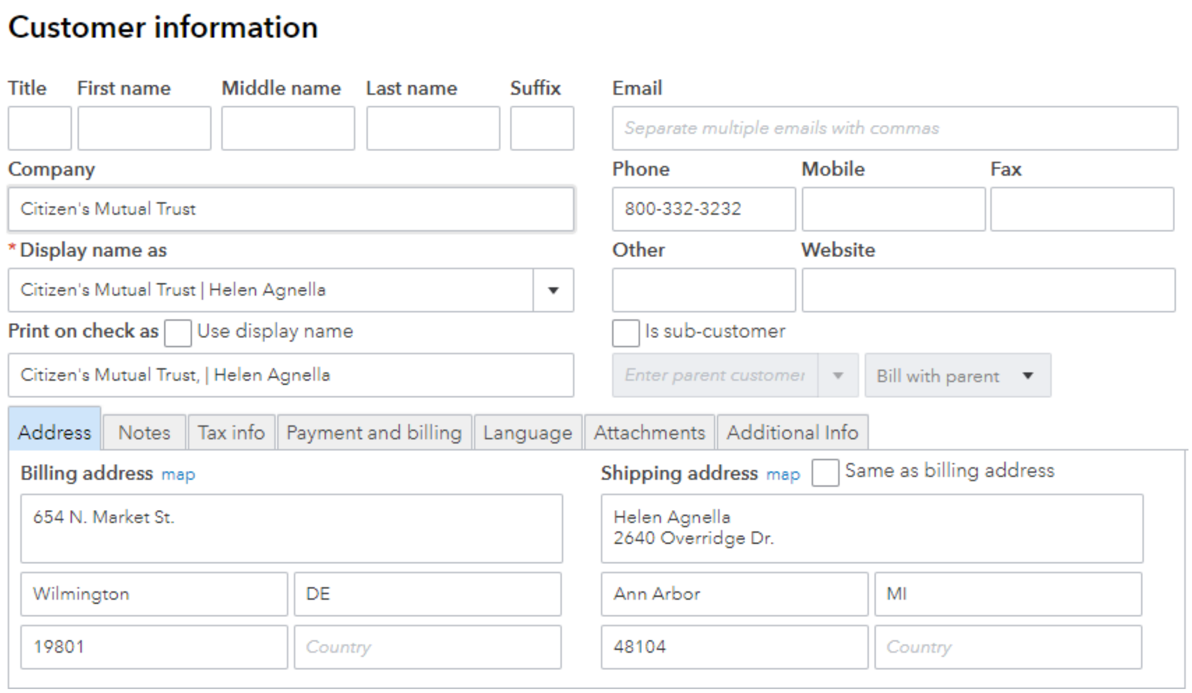
3. **Enter the name of the customer in the 'Company' field and press save**. Once you press 'Save' the name will populate in the required 'Display name as' field. If the customer is not a company, enter the customer's first and last name in the fields. You'll also want to add in any other information you have (ex. email, phone number, address).



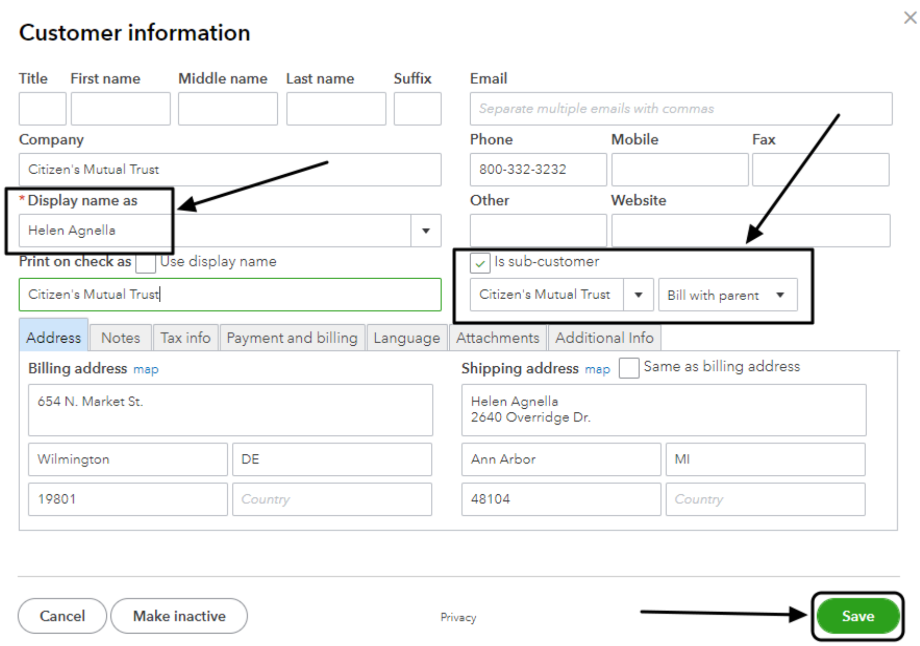
4. Navigate to the existing client/customer profile in the customer list and click on it to open the profile



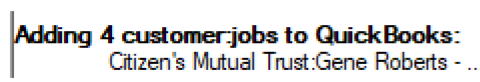
5. When you open the profile it will look like this:



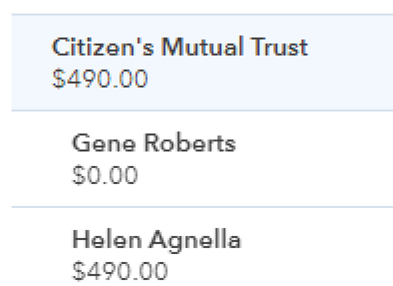
6. **Change 'Display name as' to match the client** (in this case Helen Agnella). **Next check the 'Is sub-customer' checkbox and select the customer from the drop down menu below**, you should see the customer you created in the last step. Make sure it's set to 'Bill with parent' and press 'Save'.



7. Go back to Rosemark and do a customer sync and you'll see RM and QB connecting the customer profile as well as the following addition:



8. Do the customer adds and check in QBOE, the customer should look like this:



9. You're done!