

## Resolving QuickBooks Online Edition (QBOE) Hierarchy Errors

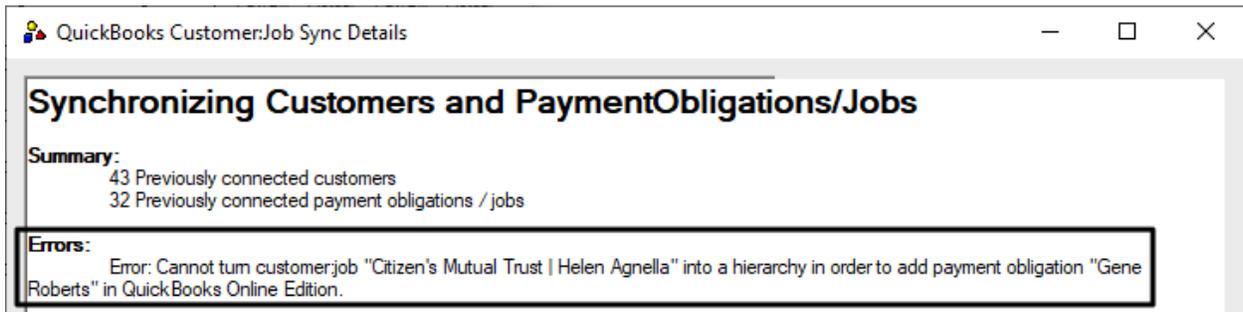
**The Problem** - Unlike QuickBooks Pro, QuickBooks Online Edition (QBOE) has trouble adding new client sub-jobs to an existing customer. In the example below you can see clients Gene Roberts and Helen Agnella.

The screenshots show the following details:

- Client: Gene Roberts** (New client):
  - Status: Active: 11/30/2020
  - First Assigned Shift: 11/30/2020
  - Last Assigned Shift: 12/6/2020
  - Services: 1 HM 10a - 11a Mon - Sun
  - Payment Obligations: Customer: Citizen's Mutual Trust
- Client: Ms. Helen Agnella, PhD.** (Existing Client):
  - Status: Active: 10/19/2020
  - First Assigned Shift: 10/19/2020
  - Last Assigned Shift: 12/4/2020
  - Services: 1 HM 8:30a - 12h Mon - Fri
  - Payment Obligations: Customer: Citizen's Mutual Trust

**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.

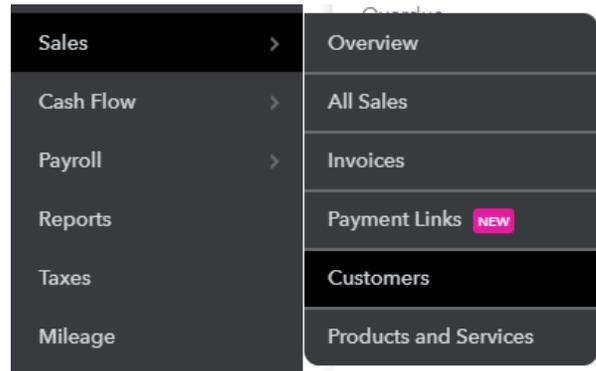
When doing a customer sync with QBOE the following error message appears:



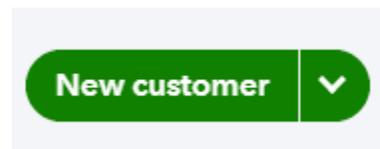
**The Solution** – Follow the steps below and adjust the profiles in QBOE to allow Rosemark to send over the client sub-job and establish a correct hierarchy in QBOE. It should look like the image on the right:



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).

**Customer information** ×

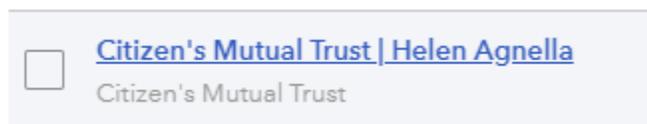
Title	First name	Middle name	Last name	Suffix	Email		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Separate multiple emails with commas"/>		
<b>Company</b>					Phone	Mobile	Fax
<input style="border: 2px solid black;" type="text" value="Citizen's Mutual Trust"/>					<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>* Display name as</b>					Other	Website	
<input type="text" value="Citizen's Mutual Trust"/>					<input type="text"/>	<input type="text"/>	
Print on check as <input checked="" type="checkbox"/> Use display name					<input type="checkbox"/> Is sub-customer		
<input type="text" value="Citizen's Mutual Trust"/>					Enter parent customer <input type="text"/>		Bill with parent <input type="text"/>

**Address** | Notes | Tax info | Payment and billing | Language | Attachments | Additional Info

<b>Billing address</b> <a href="#">map</a>				<b>Shipping address</b> <a href="#">map</a> <input checked="" type="checkbox"/> Same as billing address			
<input type="text" value="Street"/>				<input type="text" value="Street"/>			
<input type="text" value="City/Town"/>		<input type="text" value="State/Province"/>		<input type="text" value="City/Town"/>		<input type="text" value="State/Province"/>	
<input type="text" value="ZIP code"/>		<input type="text" value="Country"/>		<input type="text" value="ZIP code"/>		<input type="text" value="Country"/>	

Privacy

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:

### Customer information

Title	First name	Middle name	Last name	Suffix	Email																																		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Separate multiple emails with commas"/>																																		
Company					Phone	Mobile	Fax																																
<input type="text" value="Citizen's Mutual Trust"/>					<input type="text" value="800-332-3232"/>	<input type="text"/>	<input type="text"/>																																
* Display name as					Other	Website																																	
<input type="text" value="Citizen's Mutual Trust   Helen Agnella"/> ▼					<input type="text"/>	<input type="text"/>																																	
Print on check as <input type="checkbox"/> Use display name					<input type="checkbox"/> Is sub-customer																																		
<input type="text" value="Citizen's Mutual Trust,   Helen Agnella"/>					<input type="text" value="Enter parent customer"/> ▼		<input type="text" value="Bill with parent"/> ▼																																
<div style="display: flex; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> <span style="border: 1px solid #ccc; padding: 2px 5px;">Address</span> <span style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 5px;">Notes</span> <span style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 5px;">Tax info</span> <span style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 5px;">Payment and billing</span> <span style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 5px;">Language</span> <span style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 5px;">Attachments</span> <span style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 5px;">Additional Info</span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="4">Billing address <a href="#">map</a></td> <td colspan="4">Shipping address <a href="#">map</a> <input type="checkbox"/> Same as billing address</td> </tr> <tr> <td colspan="4"><input type="text" value="654 N. Market St."/></td> <td colspan="4"><input type="text" value="Helen Agnella&lt;br/&gt;2640 Overridge Dr."/></td> </tr> <tr> <td colspan="2"><input type="text" value="Wilmington"/></td> <td colspan="2"><input type="text" value="DE"/></td> <td colspan="2"><input type="text" value="Ann Arbor"/></td> <td colspan="2"><input type="text" value="MI"/></td> </tr> <tr> <td colspan="2"><input type="text" value="19801"/></td> <td colspan="2"><input type="text" value="Country"/></td> <td colspan="2"><input type="text" value="48104"/></td> <td colspan="2"><input type="text" value="Country"/></td> </tr> </table>								Billing address <a href="#">map</a>				Shipping address <a href="#">map</a> <input type="checkbox"/> Same as billing address				<input type="text" value="654 N. Market St."/>				<input type="text" value="Helen Agnella&lt;br/&gt;2640 Overridge Dr."/>				<input type="text" value="Wilmington"/>		<input type="text" value="DE"/>		<input type="text" value="Ann Arbor"/>		<input type="text" value="MI"/>		<input type="text" value="19801"/>		<input type="text" value="Country"/>		<input type="text" value="48104"/>		<input type="text" value="Country"/>	
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<input type="text" value="19801"/>		<input type="text" value="Country"/>		<input type="text" value="48104"/>		<input type="text" value="Country"/>																																	

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'.**

### Customer information

Title	First name	Middle name	Last name	Suffix	Email
					<i>Separate multiple emails with commas</i>
Company					Phone
Citizen's Mutual Trust					800-332-3232
<input checked="" type="checkbox"/> Display name as Helen Agnella					Mobile
Print on check as <input type="checkbox"/> Use display name Citizen's Mutual Trust					Fax
					Other
					Website
					<input checked="" type="checkbox"/> Is sub-customer Citizen's Mutual Trust Bill with parent
Address	Notes	Tax info	Payment and billing	Language	Attachments
Billing address <a href="#">map</a>			Shipping address <a href="#">map</a> <input type="checkbox"/> Same as billing address		
654 N. Market St.			Helen Agnella 2640 Override Dr.		
Wilmington	DE	Ann Arbor	MI		
19801	Country	48104	Country		

Privacy

- 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:

**Adding 4 customer jobs to QuickBooks:**  
Citizen's Mutual Trust:Gene Roberts - ...

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

<b>Citizen's Mutual Trust</b>	\$490.00
Gene Roberts	\$0.00
<b>Helen Agnella</b>	\$490.00

- You're done!