

# GrowthZone QBO 103: Troubleshooting

# Agenda

- Sync Log
  - Overview
  - Managing Sync Log Errors
  - Resync Errors
- Managing Bounced Checks
- Frequently Asked Questions

# SYNC LOG

# Sync Log

Sign up for Notification!

Catching an error early can prevent future confusion or compounding errors. Enable email notifications to get a heads up when something goes awry with the sync.

Notifications ✕

Notifications

Search  Category

<input type="checkbox"/>	Category <input type="text"/>	Notification Type <input type="text"/>	Email Address <input type="text"/>	Frequency <input type="text"/>
<input type="checkbox"/>	Billing/Finance	Membership Switched to Monthly Frequency	<input type="text" value="cheri.petterson@growthzone.com"/>	As It Happens
<input type="checkbox"/>	Quickbooks Online	Quick Books Sync Error	<input type="text" value="cheri.petterson@growthzone.com"/>	As It Happens

KB: [Subscribe to Automated Staff Notifications](#)

# Sync Log

- GrowthZone attempts to send data 10 times
- Review the sync log for information and errors or issues on a regular basis
- Adjust the table for easier viewing

The screenshot shows the 'Setup' page in GrowthZone, specifically the 'Logs' section. The page title is 'Setup' and the sub-section is 'Logs' with a timestamp 'Last sync 23h 36m 55s ago'. Below the title, there is a search bar and a filter icon. The main content is a table of sync logs. The table has columns for 'Contact', 'Type', 'Message', 'Severity', 'Execution Id', 'Date', and 'Actions'. The first two rows show 'Bauers Trees Service' with 'Writeoff' type and 'Error' severity. The message for these rows is 'Writeoff: 1446423 Ref#: 1446423 already exists f...'. The 'Date' column shows '11/13/2024 9:23 AM' and '11/13/2024 9:38 AM'. The 'Actions' column has icons for refresh and delete. A 'Table Settings' dialog box is open over the table, showing a list of columns: 'Contact', 'Type', 'Message', 'Severity', 'Execution Id', and 'Date'. Each column has a 'Show' checkbox and a 'Display' dropdown menu. The 'Message' column's 'Display' dropdown is set to 'Wrap' and is highlighted with a red box. A red arrow points from the gear icon in the table's footer to the 'Table Settings' dialog box. The footer of the table shows '1 - 28' and 'TOTAL: 28'. The 'Table Settings' dialog box has 'Cancel' and 'Done' buttons at the bottom.

Contact	Type	Message	Severity	Execution Id	Date	Actions
Bauers Trees Service	Writeoff	Writeoff: 1446423 Ref#: 1446423 already exists f...	Error	4472f780-f170-482a-8aac-0674b9f051de	11/13/2024 9:23 AM	
Bauers Trees Service	Writeoff	Writeoff: 1446423 Ref#: 1446423 already exists f...	Error	792786ae-f9d7-4235-a781-9048ef0de638	11/13/2024 9:38 AM	🔄 🗑️
Kyle's Sweets	Payment	Pa				
Kyle's Sweets	Payment	Pa				
Kyle's Sweets	Payment	Pa				
Kyle's Sweets	Payment	Pa				
Gale's Gifts	Invoice	In				

Name	Show	Display
Contact	<input checked="" type="checkbox"/>	Truncate
Type	<input checked="" type="checkbox"/>	Truncate
Message	<input checked="" type="checkbox"/>	Wrap
Severity	<input checked="" type="checkbox"/>	Truncate
Execution Id	<input checked="" type="checkbox"/>	Truncate
Date	<input checked="" type="checkbox"/>	Truncate

# Sync Log Info versus Error

Use the filter to review Info of successful syncs and Errors to manage unsuccessful syncs.

### Quickbooks Online Logs Filter

Date Range: Feb 11, 2025 - Feb 14, 2025

Contact Name (partial):

Type (partial):

Execution Id (exact):

Severity:

- Info
- Error

Info = successful sync

Error = unsuccessful sync

Cancel Done

# Sync Log Errors

- Filter to Error
- Adjust the table for easier viewing
- The most common errors are often attributed to improper setup of Fee Items or incorrect (or lack of) mapping.

KB: [QuickBooks Online Integration Sync Log](#)

Setup

Settings Logs Last sync 19h 18m 12s ago

Need help troubleshooting errors? Review [this list of common errors and troubleshooting suggestions](#).

Search... 🔍 ⚡ ⚙️ 2 X Log message level: Error 1 more

Contact	Type	Message	Severity	Execution Id	Date	Actions
Gale's Gifts	Credit	Credit: 242522 Ref#: 242522 already exists for C...	Error	651d1de2-f514-41e9-b00c-c9a2e70526ea	2/11/2025 11:26 AM	
Gale's Gifts	Credit	Credit: 242522 Ref#: 242522 already exists for C...	Error	84b56fae-6993-4c3c-920b-ebb9bd55b289	2/13/2025 11:38 AM	🔄 🗑️
Gale's Gifts	Credit	Error adding Credit: 242522 to QBO. Error: BadR...	Error	1f1a5e69-4fac-44e4-9c5d-b07655ebedbc	2/11/2025 11:19 AM	
Gale's Gifts	Writeoff	Error adding Writeoff: 1785057 to QBO. Error: Ba...	Error	9980ff09-a08e-43ed-b2f3-915b55e450f3	2/11/2025 1:20 PM	
Gale's Gifts	Writeoff	Error addin...				

## QuickBooks Online - FAQs

START COURSE

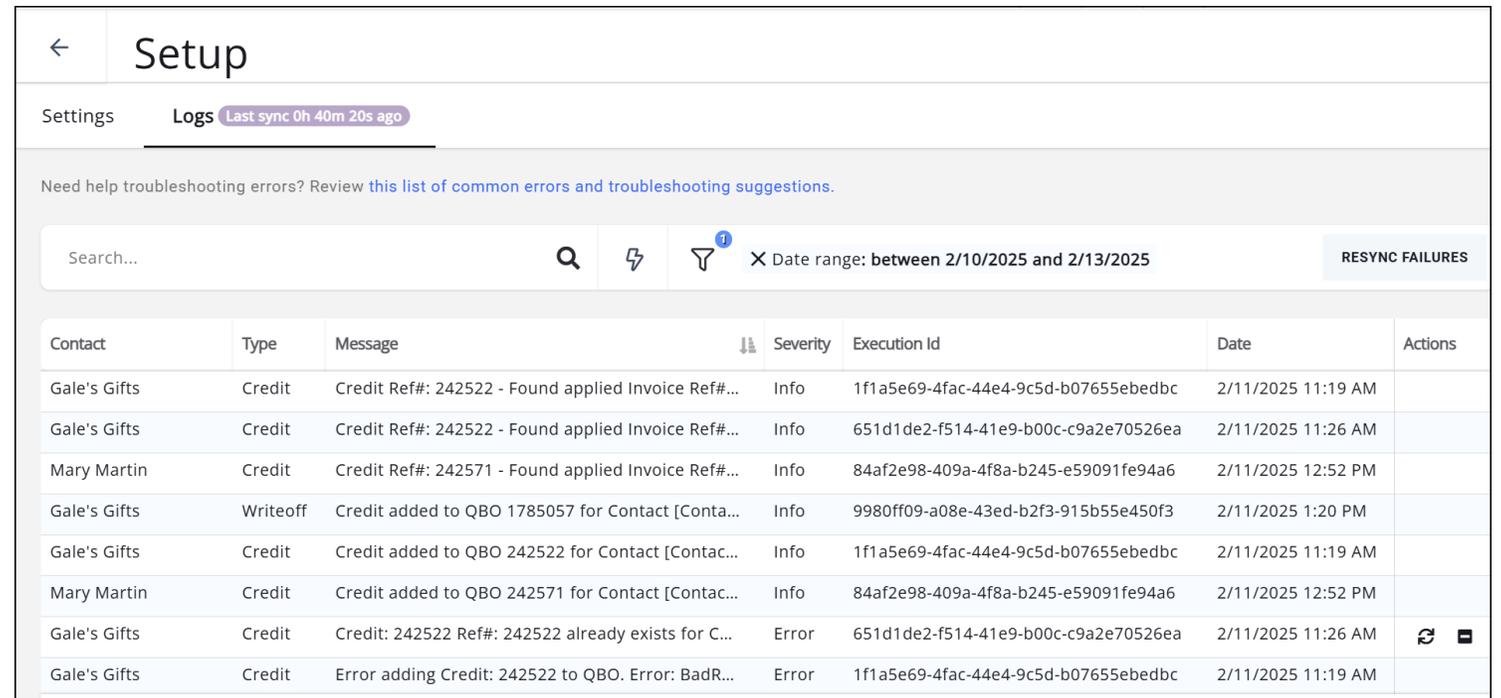
Comprehensive QuickBooks Online integration setup and maintenance training for GrowthZone customers.

TROUBLESHOOTING

- Common Sync Errors and Troubleshooting

# Managing Errors

1. Investigate error
2. Follow the information in the message
3. Make edits as appropriate
4. Resync or ignore the error

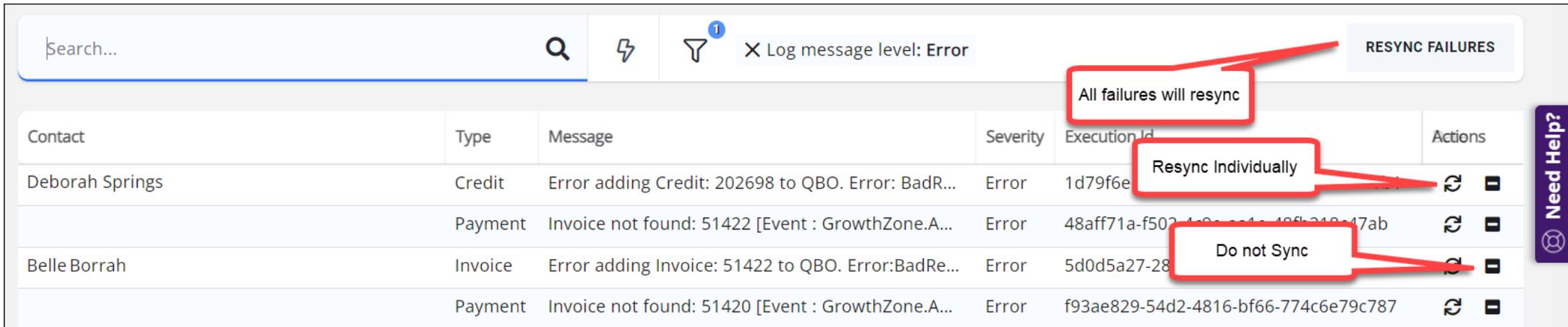


The screenshot shows the 'Setup' page with a 'Logs' tab selected. The logs are filtered for 'RESYNC FAILURES' between 2/10/2025 and 2/13/2025. The table below lists the errors.

Contact	Type	Message	Severity	Execution Id	Date	Actions
Gale's Gifts	Credit	Credit Ref#: 242522 - Found applied Invoice Ref#...	Info	1f1a5e69-4fac-44e4-9c5d-b07655ebedbc	2/11/2025 11:19 AM	
Gale's Gifts	Credit	Credit Ref#: 242522 - Found applied Invoice Ref#...	Info	651d1de2-f514-41e9-b00c-c9a2e70526ea	2/11/2025 11:26 AM	
Mary Martin	Credit	Credit Ref#: 242571 - Found applied Invoice Ref#...	Info	84af2e98-409a-4f8a-b245-e59091fe94a6	2/11/2025 12:52 PM	
Gale's Gifts	Writeoff	Credit added to QBO 1785057 for Contact [Contac...	Info	9980ff09-a08e-43ed-b2f3-915b55e450f3	2/11/2025 1:20 PM	
Gale's Gifts	Credit	Credit added to QBO 242522 for Contact [Contac...	Info	1f1a5e69-4fac-44e4-9c5d-b07655ebedbc	2/11/2025 11:19 AM	
Mary Martin	Credit	Credit added to QBO 242571 for Contact [Contac...	Info	84af2e98-409a-4f8a-b245-e59091fe94a6	2/11/2025 12:52 PM	
Gale's Gifts	Credit	Credit: 242522 Ref#: 242522 already exists for C...	Error	651d1de2-f514-41e9-b00c-c9a2e70526ea	2/11/2025 11:26 AM	 
Gale's Gifts	Credit	Error adding Credit: 242522 to QBO. Error: BadR...	Error	1f1a5e69-4fac-44e4-9c5d-b07655ebedbc	2/11/2025 11:19 AM	

# Sync Log Errors

Once you have resolved an error you can resync to QBO:



The screenshot shows a table of sync log errors. The table has columns for Contact, Type, Message, Severity, Execution Id, and Actions. There are three callouts pointing to the Actions column: 'All failures will resync' points to the top of the table, 'Resync Individually' points to the refresh icon in the first row, and 'Do not Sync' points to the stop icon in the second row.

Contact	Type	Message	Severity	Execution Id	Actions
Deborah Springs	Credit	Error adding Credit: 202698 to QBO. Error: BadR...	Error	1d79f6e...	Refresh Stop
	Payment	Invoice not found: 51422 [Event : GrowthZone.A...	Error	48aff71a-f502-4e9e-aa1e-49fb248c47ab	Refresh Stop
Belle Borrah	Invoice	Error adding Invoice: 51422 to QBO. Error:BadRe...	Error	5d0d5a27-28...	Refresh Stop
	Payment	Invoice not found: 51420 [Event : GrowthZone.A...	Error	f93ae829-54d2-4816-bf66-774c6e79c787	Refresh Stop

**NOTE:** If the sync appears slow, do not repeatedly click re-sync. Wait and allow it to catch up to avoid error duplication.

# Fee Item Adjustments

## Adjusting Old/Incorrect Fee Items

- Fee Items should not be removed if they are tied to an open invoice! Mark the old one as “OLD” until all open invoices have been satisfied.
- Use the Transaction by Contact report to search for open invoices
- Create a new Fee Item
- Map it to QBO

Transactions By Contact Report

Sale Date Range: Aug 1, 2024 - Aug 31, 2024

Member Join Date Range: No Dates Selected

Sale Entry Date: No Dates Selected

Fee Item: [Empty]

Product Category: [Empty]

Transaction Type: [Empty]

Trade/External Type: [Empty]

Fee Item Type: [Empty]

Additional Criteria / Filters

- ✕ Paid/Satisfied Date, Is Empty ✕

Display Options

Fields to Display

- ✕ Contact Name, ✕ Created Date, ✕ Description, ✕ Discount Total, ✕ Fee Item, ✕ Item Basis, ✕ Item Type, ✕ Line Item Description, ✕ Line Item Total, 5 more

Summarize By

- Fee Item

Display Mode

- Detail

Display Summary Count

QuickBooks Online Setup

**Warning:** Enabling the integration will instantly start the sync of any new transactions from GrowthZone to QuickBooks Online. To prevent sync errors, please ensure all appropriate fields are mapped before enabling the sync.

Enable QuickBooks Online Integration

DISCONNECT GROWTHZONE

DISCONNECT QUICKBOOKS

GrowthZone Status: Connected

QuickBooks Online Status: Connected

Mappings

- Fee Items
- Transaction Classes
- Tax Sets
- Chart of Accounts
- Discounts
- Payment Gateways
- Payment Types
- Write Off Accounts

KB: [Fee Items FAQ & Use Cases](#)

# Fee Item Adjustments

## New Fee Items

- When creating a new fee item make sure it has a unique name
- Accounting methodology must be Cash or Accrual with the recognition type of Fully on Invoice date
- The Deposit Account must be Undeposited Funds
- Map it to QBO

Transactions By Contact Report

Sale Date Range: Aug 1, 2024 - Aug 31, 2024

Member Join Date Range: No Dates Selected

Sale Entry Date: No Dates Selected

Fee Item: [Dropdown]

Product Category: [Dropdown]

Transaction Type: [Dropdown]

Trade/External Type: [Dropdown]

Fee Item Type: [Dropdown]

Additional Criteria / Filters

- ✕ Paid/Satisfied Date, Is Empty ✕

Display Options

Fields to Display

✕ Contact Name, ✕ Created Date, ✕ Description, ✕ Discount Total, ✕ Fee Item, ✕ Item Basis, ✕ Item Type, ✕ Line Item Description, ✕ Line Item Total, 5 more

Summarize By

Fee Item

Display Mode

Detail

Display Summary Count

QuickBooks Online Setup

**Warning:** Enabling the integration will instantly start the sync of any new transactions from GrowthZone to QuickBooks Online. To prevent sync errors, please ensure all appropriate fields are mapped before enabling the sync.

Enable QuickBooks Online Integration

DISCONNECT GROWTHZONE

DISCONNECT QUICKBOOKS

GrowthZone Status: Connected

QuickBooks Online Status: Connected

Mappings

Fee Items, Transaction Classes, Tax Sets, Chart of Accounts, Discounts, Payment Gateways, Payment Types, Write Off Accounts

# Examples of Other Errors

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- The name supplied already exists
- The payment you are trying to apply to the invoice either does not exist or it belongs to another customer.
- Payment Ref#: Could not find applied invoice Ref#
- Payment Ref#: Already exists for Customer
- Credit Ref#: Could not find applied invoice Ref#
- Unauthorized – 401
- Bad Request Invalid Account Type: Check your account details before you continue. You may need to select a different type of account for your transaction.

See [QuickBooks Online Integration Sync Log](#) for more information.

# OTHER FREQUENTLY ASKED QUESTIONS

# Managing Bounced Checks

- Refund the payment in GrowthZone. Even though this is technically not a refund, the action behind the process reverses the payment.
- Consider requiring a bank account or a credit card for future transactions

Edit Create Refund < 2 of 9 > X

Refund Date\*  Notes\*

Payment Details

Contact Name	Payment Date	Reference Number	Payment Amount
<input type="text" value="Gale's Gifts"/>	<input type="text" value="2/11/2025"/>	<input type="text" value="3100"/>	<input type="text" value="\$30.00"/>

Refund Items

Invoice #	Description	Total	Applied Amount	Already Refunded	Refund	Purchased by
<input type="text" value="201-C"/>	<input type="text" value="QB Mug"/>	<input type="text" value="\$27.00"/>	<input type="text" value="\$27.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="27"/>	<input type="text" value="Gale's Gifts"/>
<input type="text"/>	<input type="text" value="Overpayment"/>	<input type="text"/>	<input type="text" value="\$3.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="3"/>	<input type="text"/>

\$30.00

Open Balance Handling

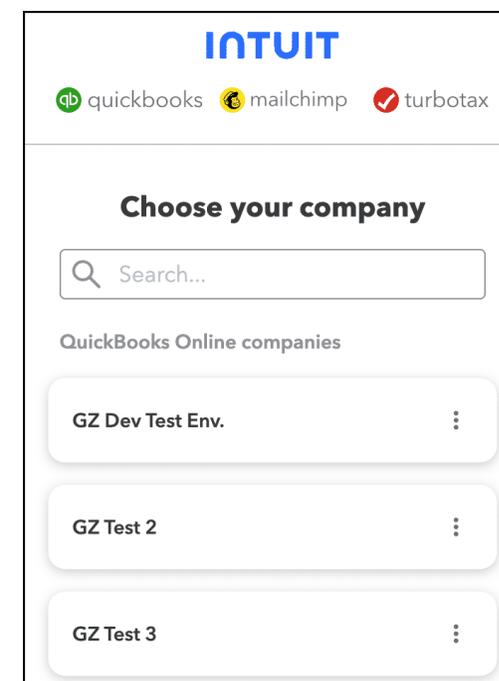
# Other Frequently Asked Questions

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- Does the integration work differently for cash versus accrual accounting? **No.**
- How are partial payments distributed across the line items on an invoice?
  - Payment will be applied to the largest line item on an invoice first. Any remaining money in the payment would then be applied to the next largest line item.
  - Payments for multiple invoices must apply to invoices for the same contact. If a payment applies to invoices for multiple *contacts* that payment will not sync correctly.

# Other Frequently Asked Questions

- Which versions of QuickBooks Online work with the GrowthZone integration? *Any version will work.*
- How do I know if I use multiple QuickBooks Online Companies? *The easiest way to tell if you have multiple companies in QuickBooks Online is if you are prompted to pick a company when you first sign in. If you only sync to one company. However,*
  - *If you only need to send data to one of the listed companies, you can use the QBO integration.*
  - *If your association has multiple legal entities but they are combined in one company in QBO you can use the integration.*



# Other Frequently Asked Questions

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- What if there is a duplicate contact name? There are a few ways to resolve this issue
  - Change the customer or vendor display name in QuickBooks. *\*Recommended.*
    - Add a space or character so no two names are identical
  - Change the first name, last name, or suffix in GrowthZone
  - Manually link the GrowthZone contact to a QuickBooks customer

KB: [QuickBooks Online Integration](#)

KB: [Manually Link a Contact](#)

# Questions?

# Training and Support

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## **Customer Service Hours:**

**Phone:** 7 a.m. – 5 p.m. CT (Monday, Tuesday, Thursday, and Friday)

800.825.9171, Option 4, then Option 2

**Chat:** 7 a.m. – 6:45 p.m. CT (Monday, Tuesday, and Thursday)

7 a.m. – 4:45 p.m. CT (Friday)

**Online Support Documentation:** [GrowthZone Knowledge Base »](#)

**Training Calendar:** [View Training Event Calendar »](#)

**Live Chat:** [GrowthZone Support Portal \(chat on far right\) »](#)