

Connex

# Customer Matching and QuickBooks



**CEO and Founder of Sync with Connex.**

**I have worked with QuickBooks for over 12 years. I created Connex for QuickBooks in 2011.**

**I have helped set-up hundreds of companies with QuickBooks Desktop.**





**What fields does Connex  
match?**





**We match the QuickBooks customer display name field. For QuickBooks Online users, we can match email. Online is more flexible with customer matching and we might add more fields.**



**Many combinations are available: customer name, company, email, single name or parent with job. This works with QuickBooks Online and QuickBooks Desktop.**



Single Name Customer:

QuickBooks Parent Customer:

No Parent Customer



No Parent Customer

Selling Channel / Marketplace

Company Name

Single Customer (Web Store)

# Advanced Customer





Title	First name	Middle name	Last name	Suffix
<input type="text"/>	<input type="text" value="Amy"/>	<input type="text"/>	<input type="text" value="Lauterbach"/>	<input type="text"/>

**Company**

Amy's Bird Sanctuary

**\* Display name as**

Amy's Bird Sanctuary



New Customer	
CUSTOMER NAME	<input type="text" value="Sync with Connex"/>

**We map customer / display name**



## Web Store

123 Main St., Watertown, MA 02472

[Add notes](#)

Transaction List

Customer Details

Late Fees



Batch actions ▼

Filter ▼

<input type="checkbox"/>	DATE ▼	TYPE	NO.	DUE DATE
<input type="checkbox"/>	06/04/2020	Sales Receipt	1046	

### Customer

Web Store ▼

### Email

*Email (Separate emails)*

☐ Send later

### Billing address

John Example  
123 Main St.  
Watertown, MA 02472

### Sales Receipt date

06/04/2020

### Ship via

### Shipping to

Joe Example  
12 Main St.  
Watertown, MA 02472

### P.O. Number

# Single Name Example





**Freeman Sporting Goods** 



Freeman Sporting Goods

**0969 Ocean View Road** 

Freeman Sporting Goods

**55 Twin Lane** 

Freeman Sporting Goods

**Freeman Sporting Goods | 0969 Ocean View Road**  

Freeman Sporting Goods | 370 Easy St., Middlefield, CA 94482

[Add notes](#)

Transaction List

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Batch actions ▼

Filter ▼

<input type="checkbox"/>	DATE ▼	TYPE	NO.	DUE DATE
<input type="checkbox"/>	10/02/2014	Invoice	1036	

# Parent Job Example

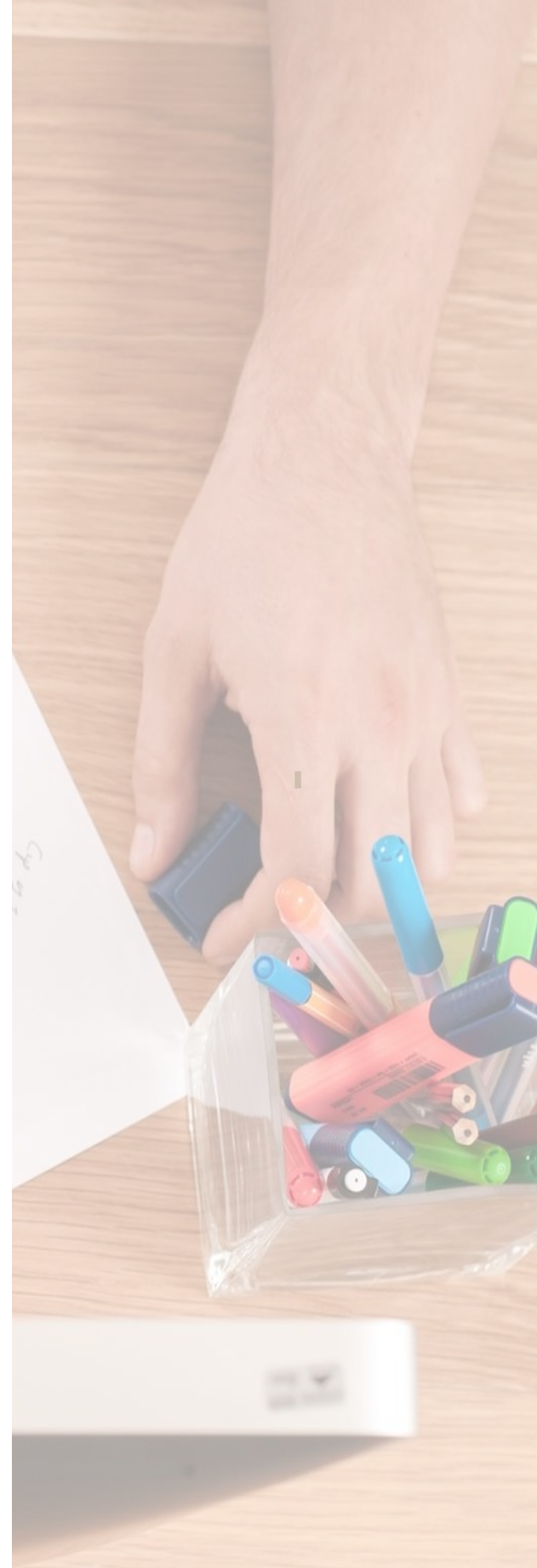




**How should I organize customers?**

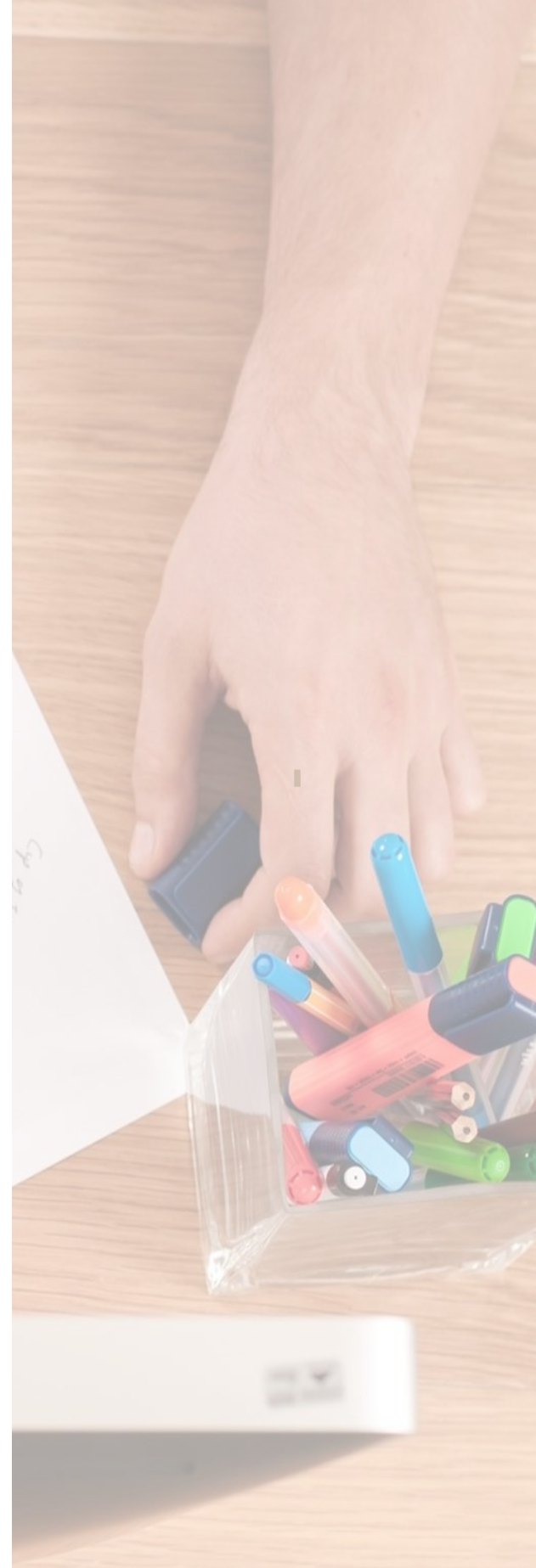


**QuickBooks Pro and Premier have a 14,500 customer limit. QuickBooks Online and QuickBooks Enterprise has no limits on customers. With larger files, such as 2 GB, I have seen performance issues.**

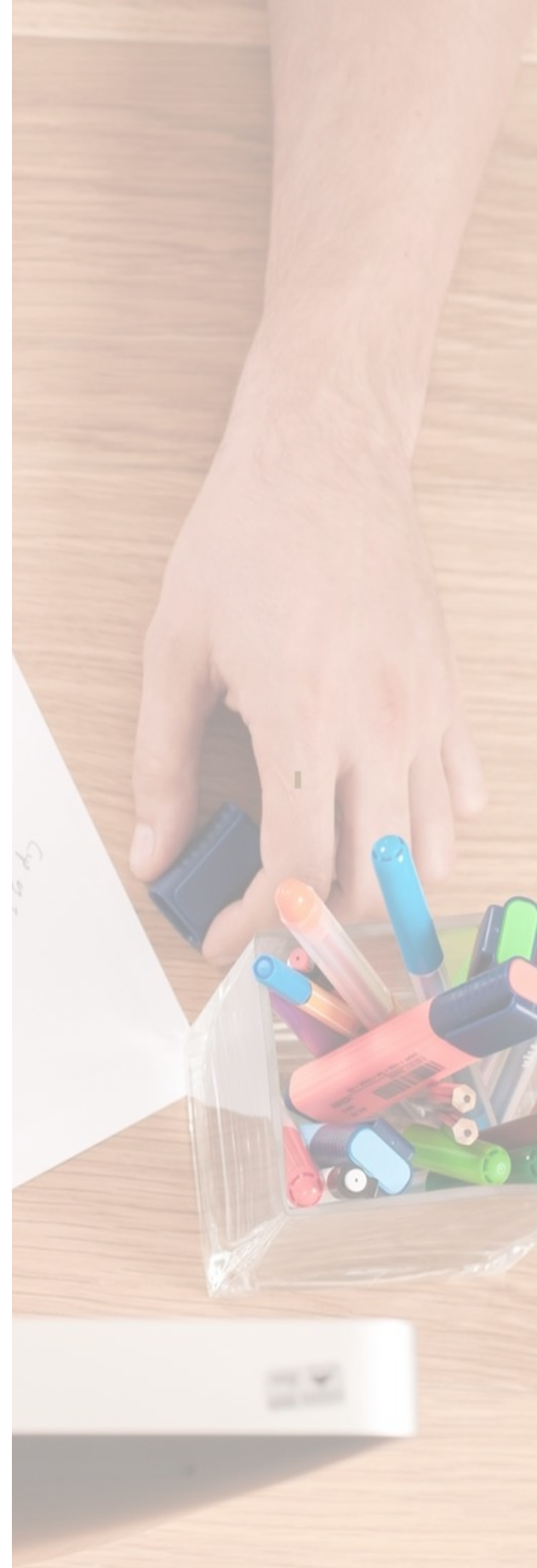




**If you do regular business with a customer, such as a company, then list them. If you sell B2C on Amazon, organize under a single customer.**



**QuickBooks is no CRM.  
Most CRMs have pre-built  
integrations with popular  
e-commerce solutions.  
You should integrate  
directly with your website.**



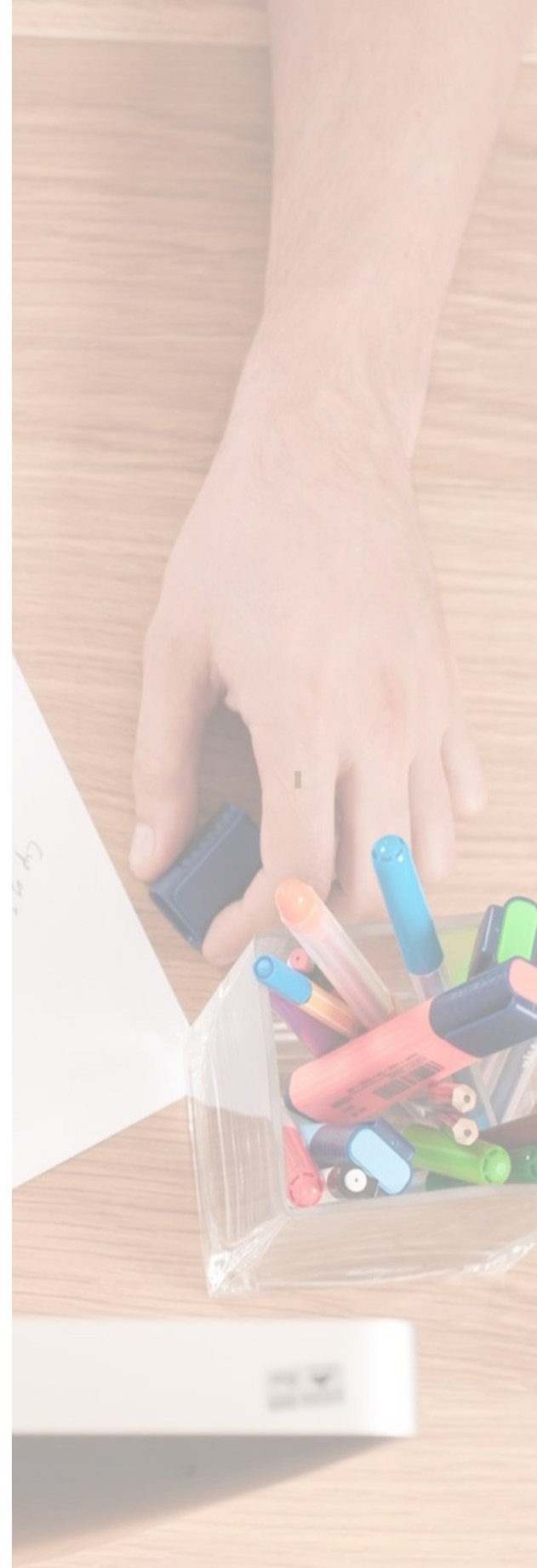


**What if my customers in QuickBooks and my selling channel are different?**

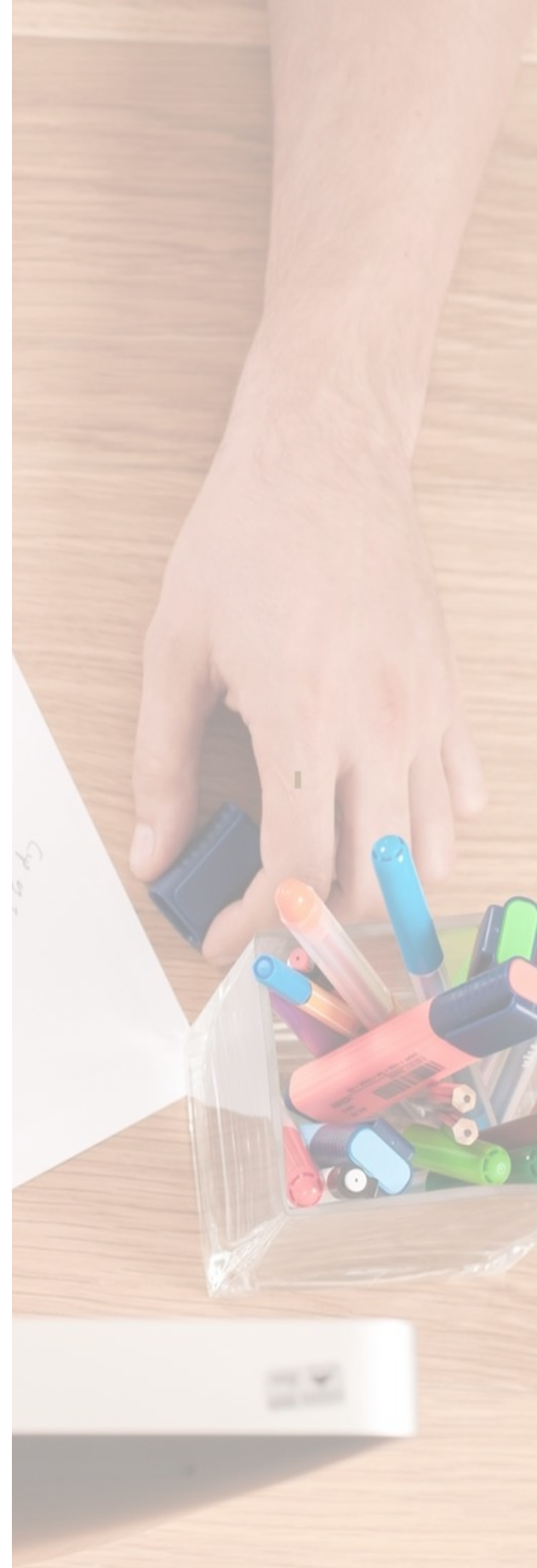




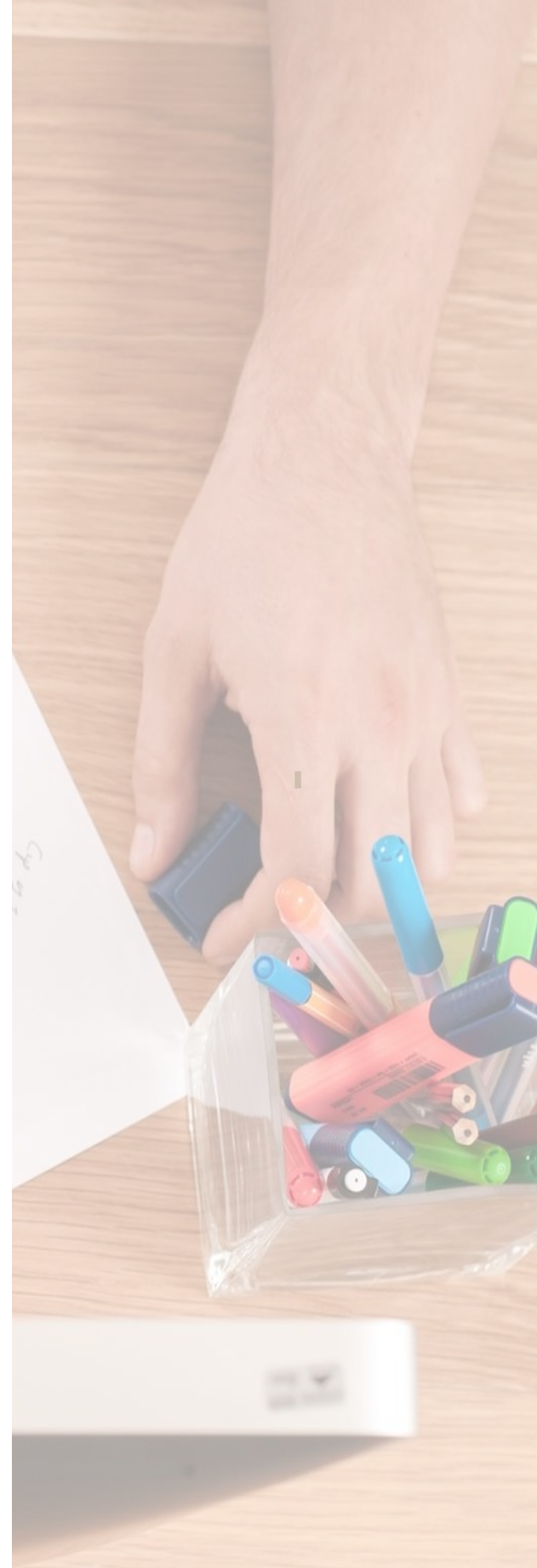
**If QuickBooks says ABC, Inc. and the website says ABC, You can add a rule in Connex to say if the company starts with ABC, then map to ABC.**



**For QuickBooks Online,  
you can use email  
matching. For QuickBooks  
Desktop, you can pull  
similar customers and  
match by name, then  
email.**



**Connex can stop the sync,  
if a customer is missing.  
Connex will log the error.  
You can either add the  
customer or create a rule  
to map the customer  
differently.**





# Summary

- Connex can match customers by their display name. QuickBooks Online can choose email. Desktop only has name and it has limited matching options.
- You can add a rule that changes the customer name, before it syncs.
- Single customer for B2C and companies for B2B.



**I still experience sync issues.  
How do I contact you?**

