

# QuickBooks Integration



PestaRoo supports QuickBooks integration as a powerful tool to meet your pest control needs AND your financial accounting needs.

## Key Issue

The key issue for connecting any two software programs is to do it in such a way that you utilize the best of each of them. QB is excellent at formal financial reports but is missing the industry specific features we need to use in the pest control industry (repeat scheduling, multiple locations, product usage etc). But, PestaRoo is extremely talented at taking care of these details. By combining QB and PestaRoo, we can leverage the best of both. So, what is the best way to combine these two programs?

## Two Methods

There are two methods of QB integration, 'direct' and 'indirect'. With 'direct' the two programs are hooked together such that when you post an invoice in one program, it is instantly posted in the other at the same time. When you add a new customer in one, it gets added to the other. So, you are really maintaining two complete sets of books. Although this may seem ideal, it actually is not. The biggest problem is that record editing does NOT usually pass between the two programs, so when you need to change an address or a payment, you'll need to do it two places. No matter how careful you are, differences creep in, and the difficulty grows and grows. Both programs have a customer list, both have accounts receivable, both have payments. The core problem of 'direct' is that both programs are trying to do the same thing and keeping the two programs reconciled, quickly becomes almost impossible. Every single time you need to correct a payment, WO, or Invoice, it has to be done in both programs, which quickly escalates into a nightmare. PestaRoo

does not support 'direct' connections with QB for these reasons.

## Indirect is Best

'Indirect', on the other hand, means only the totals are passed, instead of all the individual transactions and details. And, the needed tasks are divided between the two programs, instead of both programs 'doubling-up' on the tasks. PestaRoo takes care of the Customers, Scheduling, and Receivables, while QB does the financials. Once a week, 2 or 3 key totals are passed from PestaRoo to QB. Not only is this easier to maintain, it is also much faster. How easy is this? In QB you will have only one customer record, "PestaRoo". And each week you will post one entry into this record, one total for all invoices, and one for all payments. To get these numbers from PestaRoo, go to report option and preview the 'Invoice Summary by Customer' and then the 'Payment Summary by customer'. So by typing 2 numbers, once a week, you get the best of both worlds! And you'll save lots of time. This can typically be done in two minutes. It is that easy. And since the two programs are doing different things, you have no reconciliation to do. 'Indirect' integration is dramatically better.