

QuickBooks Online

1032 [TDO KB](#) August 10, 2026 [Quickbooks](#) 4.28K

Overview

How to load patients and sync transactions from TDO to QuickBooks Online.

rerequisites

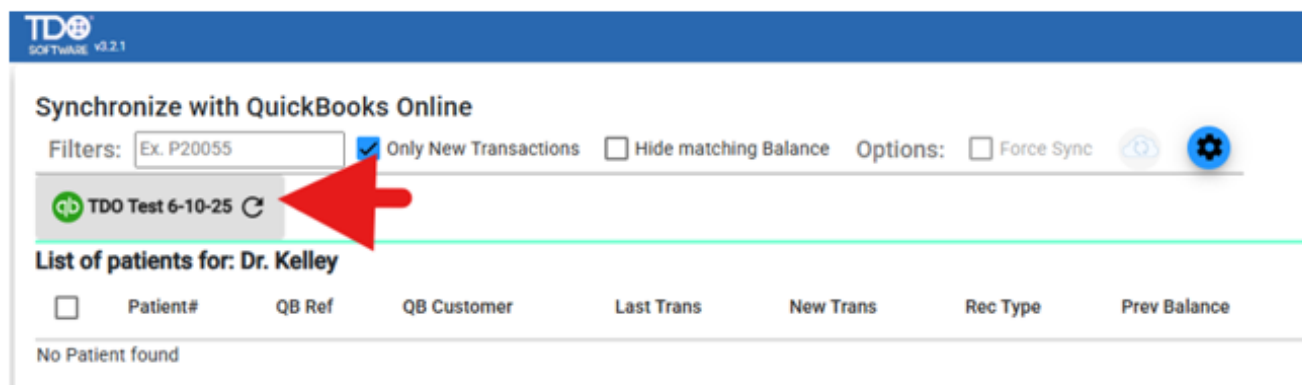
Must have a QuickBooks Online account and a company file set up. Note: if your office is in Canada you must disable taxes within QuickBooks.

Must have TDO Cloud Services and TDO Payments.

Must have QuickBooksOnline synced with TDO. Please contact support to get started.

Loading Patients

Click on the Company name, and the patients will be loaded/reloaded.



Syncing transactions

After setting up the doctor and connecting the application to QBO, you are ready to sync the transactions.

TDO SOFTWARE v2.2.14

Synchronize with QuickBooks Online

Filters: ☐ Only New Transactions ☐ Hide matching Balance Options: ☐ Force Sync  

 QB0 Test 9-2-25 

List of patients for: Dr. [REDACTED] Dr. [REDACTED]

	Patient #	QB Ref	QB Customer	Last Trans	New Trans	Rec Type	Prev Balance	TDO Balance	QB Balance	
☒	[REDACTED]	409	[REDACTED]	8/15/25	No	OK	\$0.00	\$2,052.00	\$2,052.00	
☐	[REDACTED]	410	[REDACTED]	-	No	OK	-\$440.00	-\$440.00	-\$440.00	
☐	[REDACTED]	411	[REDACTED]	-	No	OK	\$53.25	\$53.25	\$53.25	
☐	[REDACTED]	412	[REDACTED]	-	No	OK	\$145.00	\$145.00	\$145.00	
☐	[REDACTED]	413	[REDACTED]	8/21/25	No	OK	\$0.00	\$0.00	\$0.00	
☐	[REDACTED]	414	[REDACTED]	8/25/25	No	OK	\$145.00	\$0.00	\$0.00	
☐	[REDACTED]	415	[REDACTED]	8/20/25	No	OK	\$0.00	\$145.00	\$145.00	
☐	[REDACTED]	416	[REDACTED]	-	No	OK	\$140.00	\$140.00	\$140.00	
☐	[REDACTED]	417	[REDACTED]	-	No	OK	\$441.80	\$441.80	\$441.80	
☐	[REDACTED]	418	[REDACTED]	8/20/25	No	OK	\$0.00	\$892.00	\$892.00	

Legend: Patient Not Found in QB0: (0) Balance not matching: (0) Patient with new transaction(s): (0)

Only New Transactions:

If the box is checked, only patients with new transactions since the last sync will load.

If the box is unchecked, all patients from the sync start date forward will load

For an initial sync, it is critical to load ALL patients.

Select 1, multiple, or all patients for the sync (initial load would be all patients)

The cloud icon will sync the patients that have been selected by checking the box for that line.

The force sync check box is only available for one patient at a time. If you have multiple or all patients selected, the sync cloud icon will not be available.

The Legend at the bottom will flag any patients not found, not matching, or with new transactions that were not yet sent to QB. You can click the Hide matching Balances check box at the top of this to filter only those out to then force one by one to attempt to fix.

If there are patients that do not match, click on hide matching balance and then select one patient and click the box Force Sync, and then the cloud icon.

Online URL: <https://kb.tdo4endo.com/article.php?id=1032>