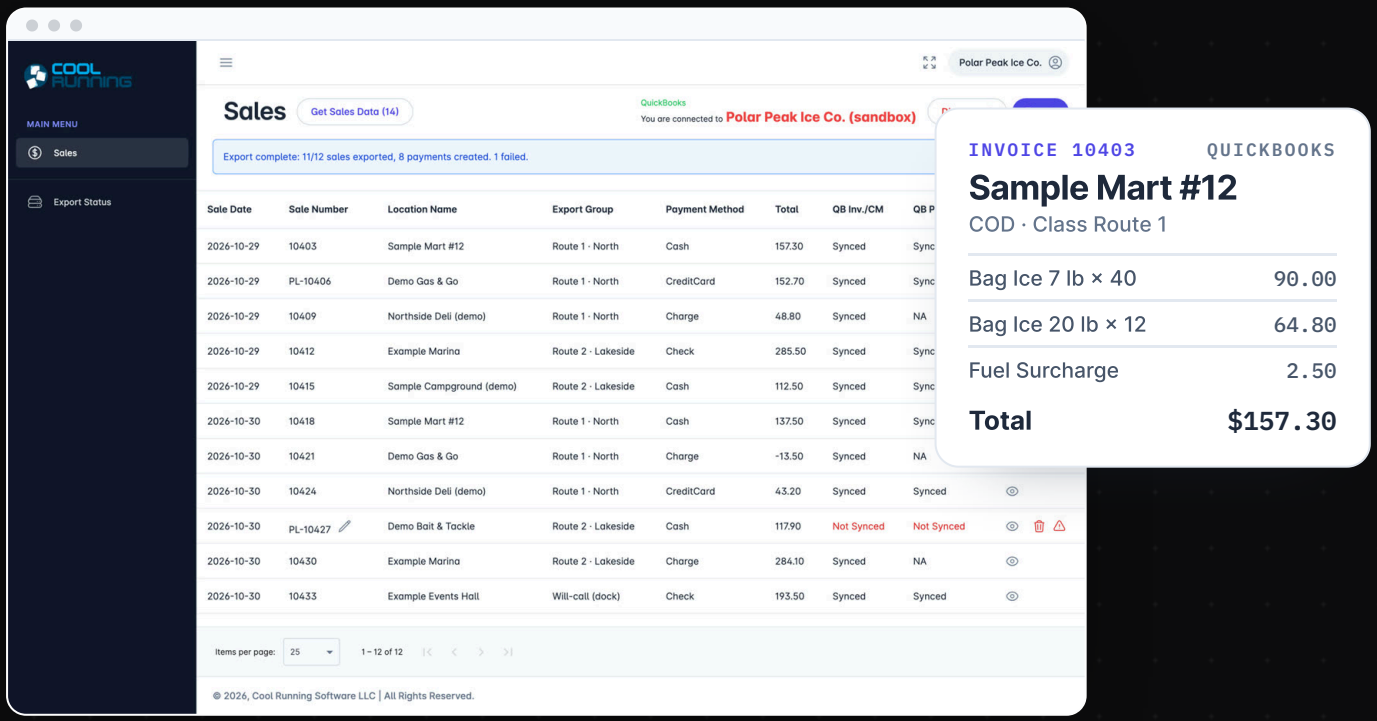
P26

CASE STUDY · COOL RUNNING

ACCOUNTING INTEGRATIONS FOR YOUR SOFTWARE

Sales in. Books done.

For Cool Running Software, in Ohio, we built CoolConnect: an integration portal that sends each ice company's route sales from Cool Running into its own QuickBooks Online company as customers, invoices, credit memos and payments, in one export.



PORTAL SCREEN: SAMPLE DATA, FICTITIOUS · INVOICE CARD IS AN ILLUSTRATION, NOT A QUICKBOOKS SCREEN

WHY

Every sale typed twice. Until now.

Cool Running Software runs routes, deliveries and invoicing for ice companies. Their bookkeepers then typed the same sales into QuickBooks by hand: every customer, invoice and payment, every day.

BEFORE

The old way

- Every route sale keyed in a second time
- Invoices built by hand in QuickBooks
- Payments matched to invoices one by one
- Returns handled separately
- Typos in the books

WITH COOLCONNECT

One export to QuickBooks.

- Sign in with the Cool Running account
- Each ice company connects its own QuickBooks company
- Pick the export group and the dates
- Customers, items and terms set up on the way
- Invoices or credit memos, then payments
- QuickBooks ids and any error kept on each sale

This guide shows the work we did for **Cool Running Software, LLC**, Ohio. The sign-in screen is the **live portal** (bridge.coolrunningsoftware.biz). Every other portal screen is the real CoolConnect build run locally with **fictitious data** (Polar Peak Ice Co., a QuickBooks sandbox name). The QuickBooks cards are our illustrations, not QuickBooks screens.

Connect, export, check, resend.

01
Connect

- Cool Running sign-in
- Licence picker: one account, several companies
- Each licence connects its own QuickBooks Online company (Intuit OAuth 2)
- Disconnect and reconnect any time

02
Export

- Sales by export group and date
- Customers, items (with surcharges, private label), terms, payment methods, classes, locations, tax codes
- Invoices, or credit memos for negative sales
- Payments against the invoice

03
Reliable

- Three phases through the QuickBooks Batch API
- 30 per batch, 3 retries
- Duplicates caught, system hiccups skipped
- Errors saved on each sale; every run logged

04
Under control

- Edit a receipt number before export
- View a sale's full data
- Unmark a sale in Cool Running and resend
- Task status for each import and export

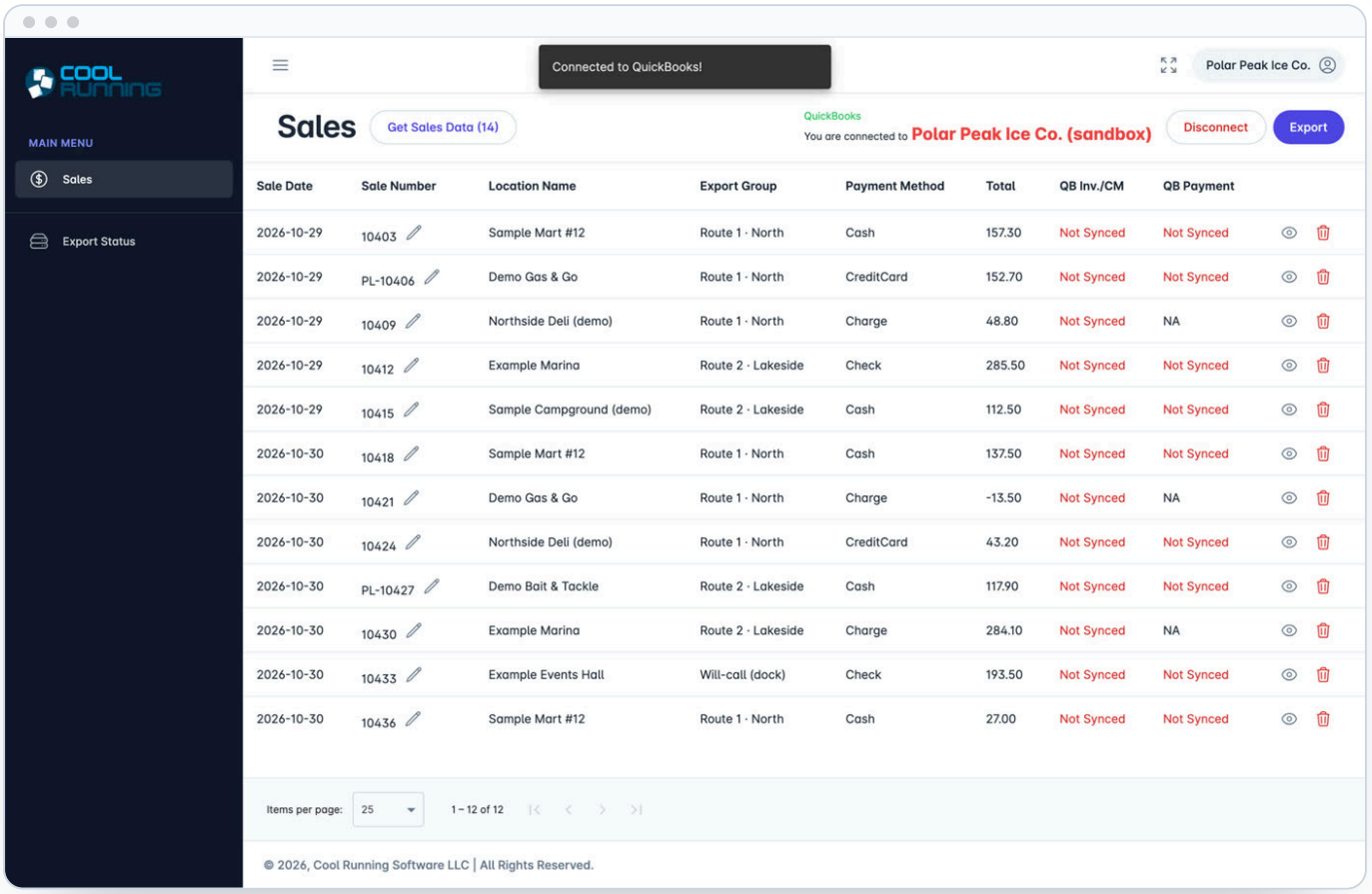
Ask for a quote

Accounting integrations for your software: your sales, customers and payments in QuickBooks Online or another ledger, following your business rules.

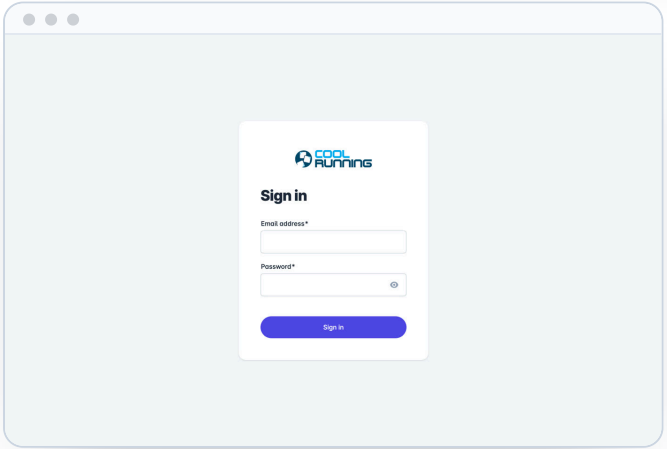
01 · CONNECT

Each company, its own books.

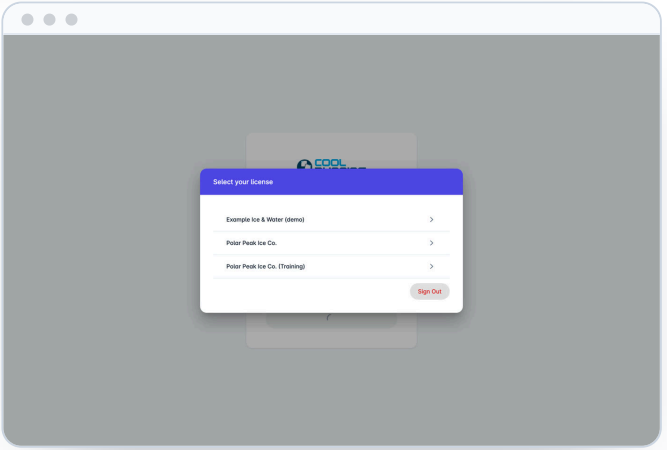
Ice companies sign in with their Cool Running account, pick the licence, and connect that company's own QuickBooks Online through Intuit's sign-in. Nothing can be sent until a company is connected, and the portal always names the company before an export.



CONNECTED TO POLAR PEAK ICE CO. (SANDBOX): SALES WAITING TO SEND



SIGN-IN · LIVE, BRIDGE.COOLRUNNINGSOFTWARE.BIZ

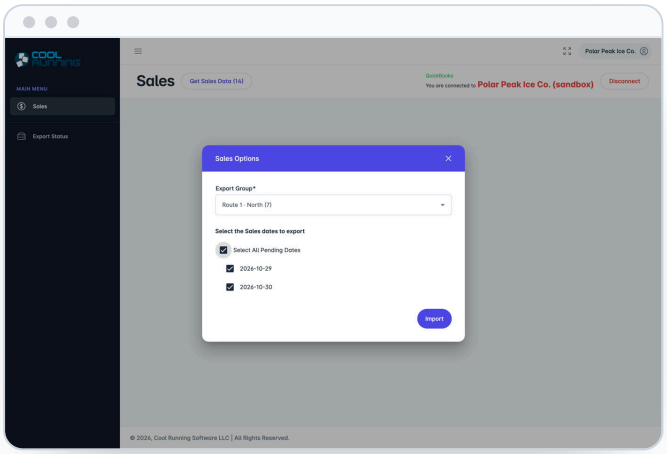


LICENCE PICKER

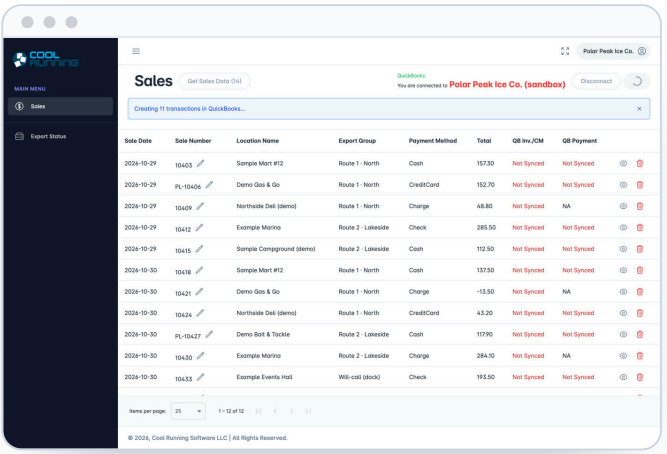
COOLCONNECT PORTAL RUN LOCALLY · SAMPLE DATA, FICTITIOUS

The day's sales, in one export.

Pick an export group and the dates still to send. The sales come across from Cool Running and are marked exported there, so they are never pulled twice. One Export button then sends them all, in three phases.



SALES OPTIONS: EXPORT GROUP AND DATES



EXPORT RUNNING: PHASE 2

PHASE 1

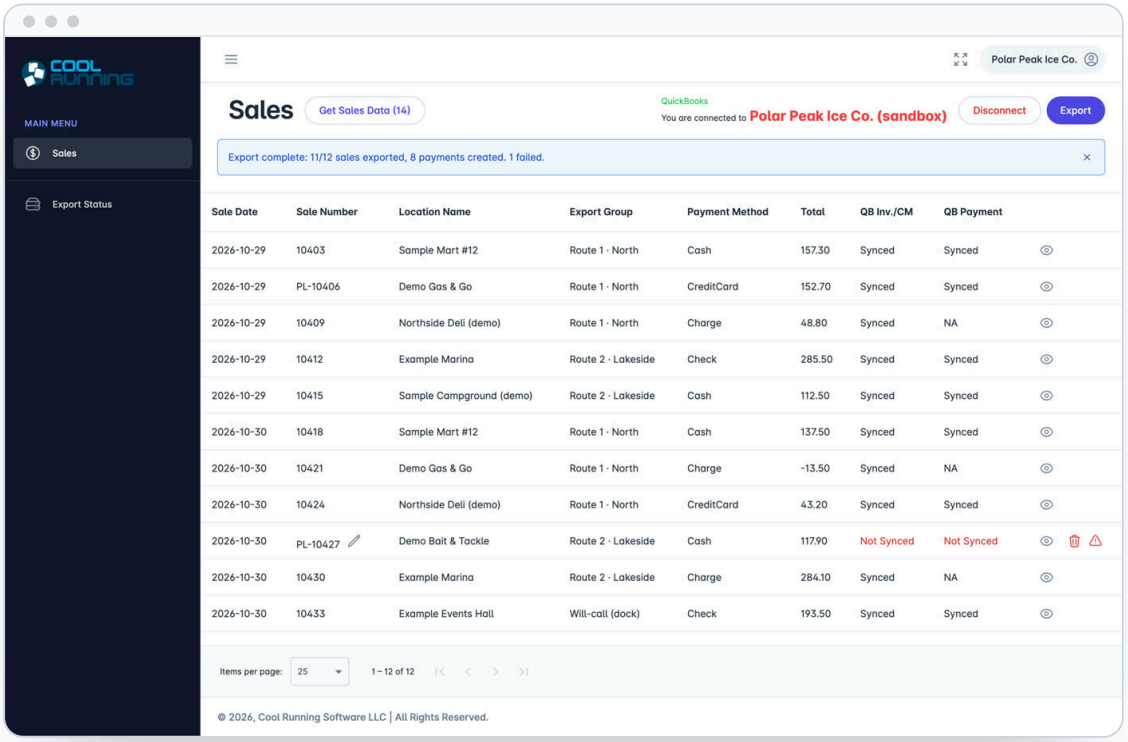
Customers, items, terms, payment methods, classes, locations, tax codes

PHASE 2

Invoices, or credit memos for negative sales

PHASE 3

Payments for cash, card and check sales



EXPORT COMPLETE: 11 OF 12 SALES SYNCED; THE ONE HELD BACK SHOWS WHY

One sale in Cool Running. Its records in QuickBooks.

The export follows Cool Running's rules: the receipt or private-label number becomes the invoice number; terms, class, location and tax code come from Cool Running's own QuickBooks settings; surcharges become their own items.

COOL RUNNING · ROUTE SALE

SALE 10403 — OCT 29, 2026

Sample Mart #12

Route 1 · North · Alex Demo · Cash

Bag Ice 7 lb × 40	90.00
Bag Ice 20 lb × 12	64.80
Fuel Surcharge	2.50
Total	**$157.30**

QUICKBOOKS ONLINE · SET UP ON THE WAY

CUSTOMER
Sample Mart #12 · store12@example.com

ITEMS
Bag Ice 7 lb · Bag Ice 20 lb · Fuel Surcharge

TERM · CLASS · LOCATION
COD · Route 1 · Route 1

TAX CODE · PAYMENT METHOD
Out of scope · Cash

QUICKBOOKS ONLINE · POSTED

INVOICE 10403 — DUE OCT 29, 2026

Sample Mart #12

Terms COD · Class Route 1

Bag Ice 7 lb · 40 × 2.25	90.00
Bag Ice 20 lb · 12 × 5.40	64.80
Fuel Surcharge	2.50
Total	**$157.30**

PAYMENT — CASH

$157.30 → Invoice 10403

Linked to the invoice; the invoice shows paid

CREDIT MEMO 10421 — OCT 30, 2026

Demo Gas & Go · $13.50

A negative sale (6 bags returned) goes across as a credit memo, not an invoice

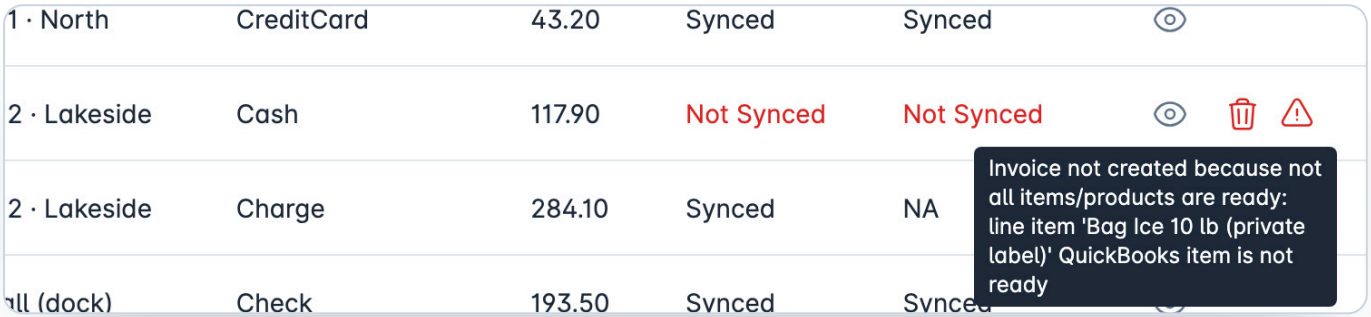
- Private-label receipts keep their own number
- Surcharges, including private-label, as items
- Payments only for cash, card and check
- Charge sales stay open on their terms

DESIGNED ILLUSTRATION FROM THE EXPORT'S FIELD MAPPING, NOT A QUICKBOOKS SCREEN · SAMPLE DATA, FICTITIOUS

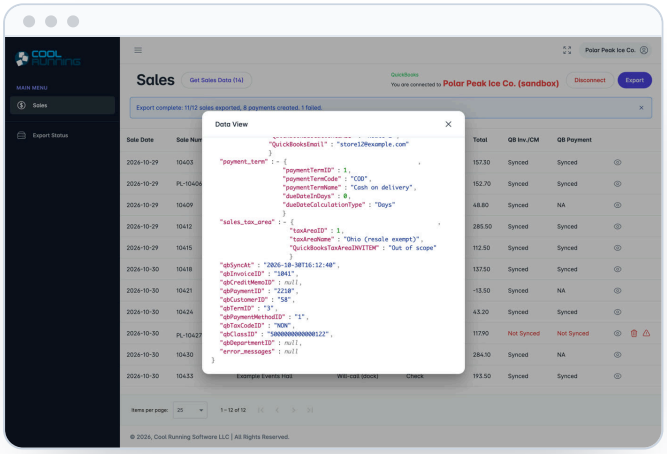
05 · SAFE RE-RUNS

Nothing posted twice. Nothing lost quietly.

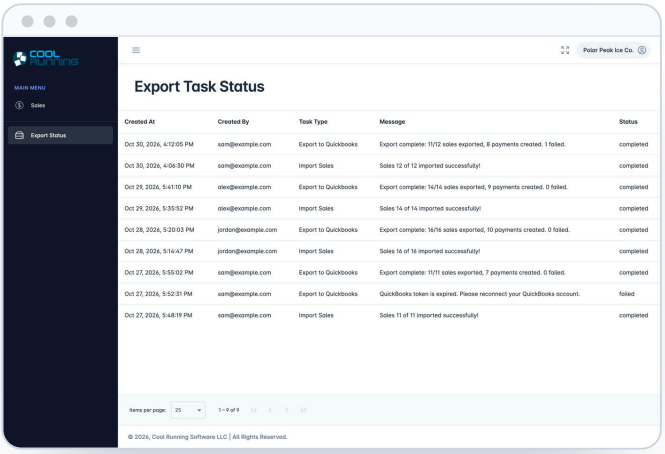
Exports go through the QuickBooks Batch API, 30 records a batch with up to 3 retries. Records that already exist are found, not duplicated; a sale whose items aren't ready is held back with the reason saved on the sale.



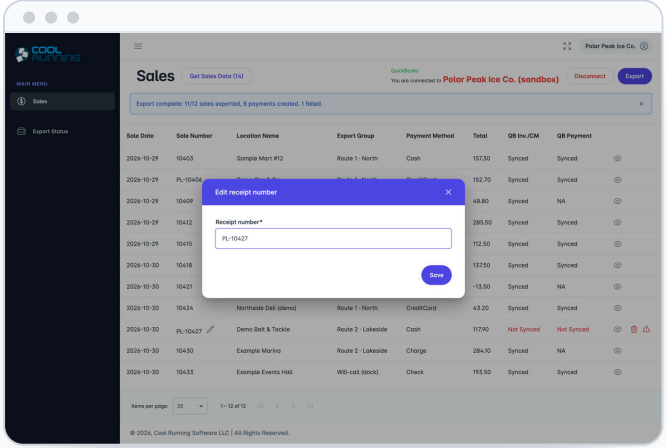
THE REASON, ON THE SALE



QUICKBOOKS IDS KEPT ON EACH SALE



EVERY IMPORT AND EXPORT, LOGGED



EDIT THE RECEIPT NUMBER BEFORE EXPORT

- 30 per batch, 3 retries
- Duplicates caught
- QuickBooks system hiccups skipped
- Readiness checked per line
- Unmark in Cool Running and resend

COOLCONNECT PORTAL RUN LOCALLY · SAMPLE DATA, FICTITIOUS

CASE STUDY · COOL RUNNING SOFTWARE, OHIO, USA

Cool Running Software, LLC runs route, delivery and invoicing software for ice companies. P26 built CoolConnect, the QuickBooks Online integration portal (FastAPI backend and Angular portal), from April 2025, with 148 commits through September 2026.

Weeks early

delivered ahead of the agreed date

TONY DICKSON, COOL RUNNING, 2026

90%

less time spent entering route sales into QuickBooks

CLIENT-REPORTED, NOV 2026

1 export

sends a day's customers, invoices and payments across

2025 PORTAL

3 phases

customers and items, then invoices and credit memos, then payments

2025 PORTAL

1 per company

each ice company connects its own QuickBooks Online

2025 PORTAL

> “P26 delivered our QuickBooks API **weeks before it was due.** They took the time to understand our unique business rules and handled adjustments with great patience. We couldn't be more pleased with their work and have already signed them for a much larger development project. Highly recommended for international collaboration.”



Tony Dickson
OWNER, COOL RUNNING SOFTWARE

- Backend: Python 3.12, FastAPI, SQLAlchemy, Alembic, MySQL 8
- QuickBooks: python-quickbooks, intuit-oauth, Batch API
- Portal: Angular 18, Angular Material, Tailwind CSS
- Docker, Traefik, Let's Encrypt

BRIDGE.COOLRUNNINGSOFTWARE.BIZ

"90%" IS CLIENT-REPORTED (NOV 2026). "WEEKS EARLY" IS FROM TONY DICKSON'S TESTIMONIAL. OTHER FIGURES FROM THE 2025 PORTAL'S CODE.

From your rules to clean books.

01

FIRST CALL

Learn the business rules

How you price, charge, return and get paid, and how your customers' bookkeepers want it to look in their ledger.

02

PLAN

Map every field

Which record becomes a customer, an item, an invoice, a credit memo or a payment, and what happens when one fails. Agreed before we build.

03

BUILD

Build against a sandbox

We build against your API and a QuickBooks sandbox company first, then test with a real company your team chooses.

04

HAND OVER

Launch and adjust

Roll out to your customers one by one, fix what the first exports turn up, and adjust as your rules change.

WHAT WE NEED FROM YOU

- API docs or database access
- A QuickBooks sandbox or test company
- How returns and surcharges work
- A server or cloud account
- One person who can say yes
- A test account with sample data
- Your pricing, tax and terms rules
- Example invoices your customers expect
- An Intuit developer app, or we set it up
- Feedback within a day at each step

P26

ACCOUNTING INTEGRATIONS FOR YOUR SOFTWARE

Book a free 30-minute call.

Ask for a quote

Your sales, customers, invoices and payments sent to QuickBooks Online or another ledger, following your business rules, with batch exports, retries and a log of every run. Tell us about your product and your customers' books, and we will quote for the build.

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CALL OR WHATSAPP

cal.com/abhishekj/p26-meeting
BOOK A CALL

Vadodara, Gujarat, India

Scan for the CoolConnect case on p26.co

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