First Time Setup

Version 154

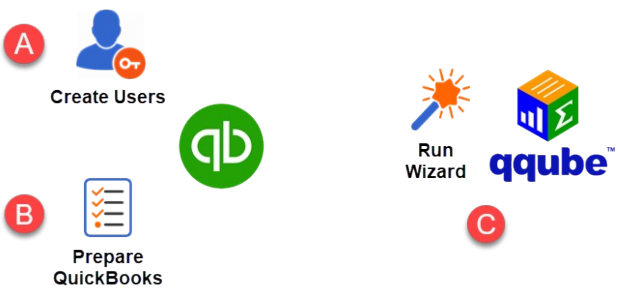
Published 1/26/2013 by CLEARIFY® SUPPORT Last updated 11/16/2019 9:34 AM by CLEARIFY® SUPPORT

Required steps to make QuickBooks work with QQube

> Intuit does not give any developer direct access to the database, and instead uses a Software Development Kit (SDK) which has requirements and shortcomings that require special attention and preparation.

Avoid Synch Errors!

After you complete the appropriate type of installation, you will need to perform the following three steps before synching your data the first time.



Watch "Preparing QuickBooks to work with QQube"

[A] Create QuickBooks users with proper permissions for QQube

QQube requires QuickBooks user(s) with full permissions to extract all of the necessary data - no exceptions.

- **QuickBooks Pro or Premiere**, will require a **QuickBooks user** named QQube which will have complete unrestricted access to the QuickBooks data.

- **QuickBooks Enterprise Solutions** will require a **QuickBooks user** named QQube and an additional **Custom Reporting user**, also called QQube,

The first time you connect to QuickBooks from QQube, you will establish the proper connection via these users - as a one time operation.

FOLLOW THESE INSTRUCTIONS FOR CREATING CONNECTION USERS

[B] Complete the QuickBooks Preparation Checklist

Things to check before loading ANY data.

1. **QuickBooks is registered.**
2. **Latest QB Release** is installed.
3. **Users and Permissions** as in [A] Above.
4. **QuickBooks Preferences.** (Edit>Preferences)
    1. Accounting - Show Lowest Subaccount UNchecked
    2. Integrated Applications - "Don't allow any applications...." UNchecked
    3. Report Preferences - Set to 'Name only' for items if using assemblies' set to 'Name only' for accounts if using Pro/Premiere.
5. **Quick Startups turned off**. (Edit>Preferences - under the QQube user, NOT the admin user) (Feature not present in QB 2018 or later.)
6. **No Modal Dialogue Boxes**. When opening QB, there should be no modal dialogue boxes appearing.
7. **Rebuild your QB file**. This is always a good thing to do - especially on large files.

FOLLOW THESE INSTRUCTIONS FOR THE ITEMS IN THIS CHECKLIST

[C] Run the Configuration Tool Wizard

The Configuration Tool Wizard is a 'quick start' option to get your data extraction process secured in fewer steps, than by using the QQube Configuration Tool directly.

What **the configuration wizard** will step you through:

1. Ensuring you have completed the **QuickBooks Preparation Checklist.**
2. **Connecting** to the currently open QuickBooks company, employing the users you created in Step [A]
3. **Selecting the appropriate analytics for your business**.
4. **Confirming your fiscal year setup**.
5. **Setting the Scheduling Frequency.**
6. Making a decision to kick off the **initial data synch** immediately, or wait until the scheduled frequency time you set in the last step.

FOLLOW THESE INSTRUCTIONS FOR RUNNING THE CONFIGURATION WIZARD

[D] Add Additional Companies (Optional)

This requires the QQube Multiple Company Add-On and will NOT involve the use of the Configuration Wizard.

For each company you want to add, you will:

1. Complete the QuickBooks Preparation Checklist as in [A] above.
2. **Go to the QQube Configuration Tool** and Add the company to prompt permissions confirmation from QuickBooks.
3. **Save** your choice.
4. Remember to open up QuickBooks to NO company file before proceeding.

Watch "Working with Multiple QuickBoks files in QQube"

tags : Configuration-Wizard, Create-Users