QuickBooks Desktop Connector

Overview

DBSync's QuickBooks Connector provides an easy way to perform integration, data extraction or data loading into QuickBooks Desktop Accounting software. The connector connects directly to QuickBooks company data file (*.QuickBooksw). It allows a user to query, add, modify and delete various types of records including customers, Items, Vendors, Invoices, Sales orders, Purchase orders and much more. Furthermore, the connector uses the QuickBooks XML to move data in, and out of, QuickBooks desktop. Integrating with QuickBooks desktop consists of SOAP web service calls using an XML request/response made over an HTTPS connection.

Prerequisites

To establish a connection to QuickBooks desktop, via DBSync's QuickBooks desktop connector, user must:

- Have a valid license to DBSync QuickBooks desktop connector, username and password to connect to DBSync iPaaS platform.
- Have QuickBooks Web-Connector configured to connect to DBSync to read from, and write to, QuickBooks desktop. you can download the web connector from Intuit marketplace by clicking on the link. Steps to configure your web connector are followed in the latter section.
- Have QuickBooks administrative rights.

Connector Configurations

The table below represents parameters required for opening the connection to QuickBooks file.

Property	Description	Required
QuickBooks File	The path of the QuickBooks file where it is hosted. The file path can be obtained in the following way 1. Open the QuickBooks file 2. press the function **F2** key from your keyboard 3. you will find the QuickBooks file path	Yes
QuickBooks Version	you can choose the relevant version of your QuickBooks Desktop from available values.	Yes
Process Name	The process name is the same process name in DBSync that is trying to access the QuickBooks file. The naming convention is as follows: "processdefinition_processname.xml".	Yes

Steps to configure Web-Connector:

1. Click on **Download Web Connector** to download the .qwc file. Open this downloaded file with QuickBooks Web Connector.
2. Click **OK** on the Authorization screen.
3. Select the option '**Yes, always; allow access even if QuickBooks is not running**'. Then, click on continue.
4. Click on **Done** to confirm Access.
5. DBSync integration process will be added to your QuickBooks Web-Connector. Once the process is added to the web-connector, add the DBSync account password in the highlighted section of the Web-Connector.
6. This completes the process of configuring DBSync for integration with your QuickBooks company file.

Uses Of QuickBooks Desktop Connector

1. Eliminate manual data entry by connecting QuickBooks to other systems that are supported by DBSync.
2. Automate business process to increase efficiency across departments by reducing data reconciliation.
3. Make your customer, item, vendor, invoice records as zero error prone as possible while moving in, and out of, QuickBooks.

Supported Versions

- QuickBooks Desktop 2007 onwards.
- Pro, Premier and Enterprise Editions.
- US, Canada, and the UK.

Notes - Please note that for all QuickBooks desktop software, integration is supported only for Windows platform and not MAC or other operating systems.

Frequently Asked Questions

Q: Can I get a trial of DBSync?

A: DBSync is available free for 30 days trial after going through the Signup process.

Q: Can this connector be used for Bi-Directional sync?

A: Yes. Furthermore, if you so choose, you can also make it uni-directional.

Q: Is this connector available with, On-Demand or On-Premise, Versions?

A: This profile is available with both Versions.

Q: How Frequently can we perform Sync?

A: Sync can be performed every 5 minutes.

Useful hint
QuickBooks Website

Intuit Developer Portal

QuickBooks Desktop User Guide