Installation Help: QuickBooks Connector Install Guide

This tutorial will guide you through the installation of the Assured QuickBooks Connector.

The Assured QuickBooks Connector is a 2-way link between the QuickBooks Desktop client and Assured JobCheck that will enable export and import of specified data. To facilitate this integration, an .msi application (The QuickBooks Connector) must first be downloaded; it is recommended that this download occurs on the computer of the employee responsible for accounting duties.

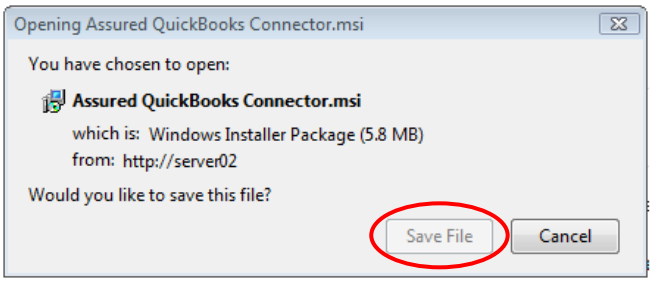
Before You Get Started

1. Ensure that you have an active Assured JobCheck account.
2. Ensure that you are using one of the supported versions of QuickBooks Desktop as shown in the table below:

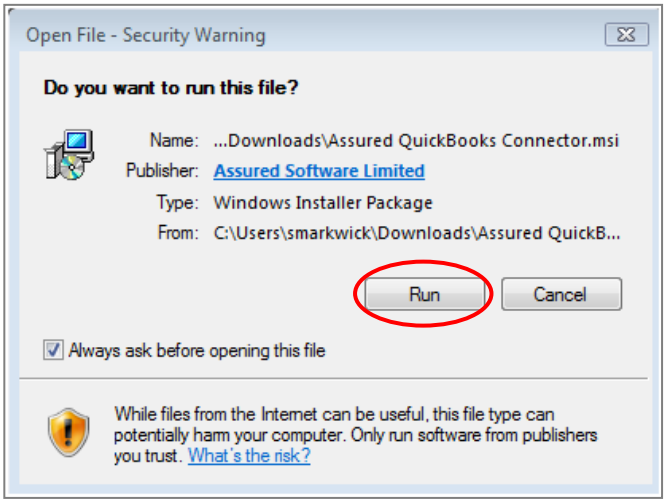
Supported Version of QuickBooks	qbXML Specification Version
Canadian	
QuickBooks 2014 and Enterprise 14.0 (Using QBXMLRP2)	13.0, 12.0, 11.0, 10.0, 9.0, 8.0, 7.0, 6.0, 5.0, 4.1, 4.0, 3.0, 2.1, 2.0, 1.1, 1.0
QuickBooks 2013 and Enterprise 13.0 (Using QBXMLRP2)	12.0, 11.0, 10.0, 9.0, 8.0, 7.0, 6.0, 5.0, 4.1, 4.0, 3.0, 2.1, 2.0, 1.1, 1.0
QuickBooks 2012 and Enterprise 12.0 (Using QBXMLRP2)	11.0, 10.0, 9.0, 8.0, 7.0, 6.0, 5.0, 4.1, 4.0, 3.0, 2.1, 2.0, 1.1, 1.0
QuickBooks 2011 and Enterprise 11.0 (Using QBXMLRP2)	10.0, 9.0, 8.0, 7.0, 6.0, 5.0, 4.1 4.0, 3.0, 2.1, 2.0, 1.1, 1.0
QuickBooks 2010 and Enterprise 10.0 (Using QBXMLRP2)	9.0, 8.0, 7.0, 6.0, 5.0, 4.1 4.0, 3.0, 2.1, 2.0, 1.1, 1.0
American	
QuickBooks 2014 and Enterprise 14.0 (Using QBXMLRP2)	13.0, 12.0, 11.0, 10.0, 9.0, 8.0, 7.0, 6.0, 5.0, 4.1, 4.0, 3.0, 2.1, 2.0, 1.1, 1.0
QuickBooks 2013 and Enterprise 13.0 (Using QBXMLRP2)	12.0, 11.0, 10.0, 9.0, 8.0, 7.0, 6.0, 5.0, 4.1, 4.0, 3.0, 2.1, 2.0, 1.1, 1.0
QuickBooks 2012 and Enterprise 12.0 (Using QBXMLRP2)	11.0, 10.0, 9.0, 8.0, 7.0, 6.0, 5.0, 4.1, 4.0, 3.0, 2.1, 2.0, 1.1, 1.0
QuickBooks 2011 and Enterprise 11.0 (Using QBXMLRP2)	10.0, 9.0, 8.0, 7.0, 6.0, 5.0, 4.1 4.0, 3.0, 2.1, 2.0, 1.1, 1.0
QuickBooks 2010 and Enterprise 10.0 (Using QBXMLRP2)	9.0, 8.0, 7.0, 6.0, 5.0, 4.1 4.0, 3.0, 2.1, 2.0, 1.1, 1.0
QuickBooks 2009 and Enterprise 9.0 (Using QBXMLRP2)	8.0, 7.0, 6.0, 5.0, 4.1 4.0, 3.0, 2.1, 2.0, 1.1, 1.0

Installing the QuickBooks Connector

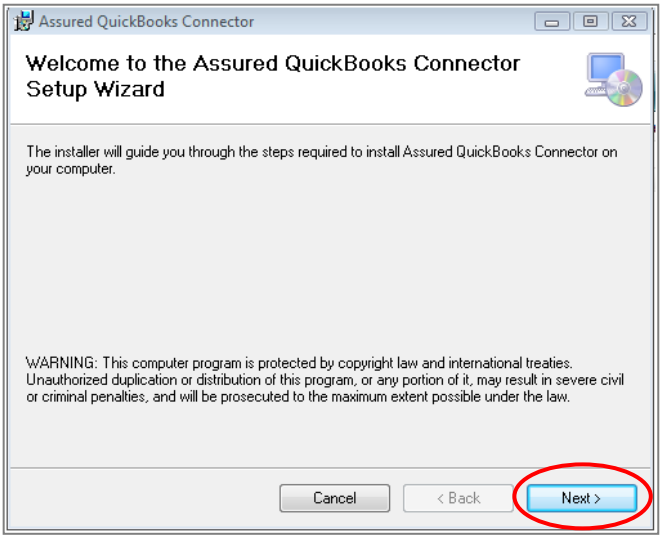
Click here to download the Connector. Your browser will launch an installer, shown below. Please follow the steps as shown next to each screenshot.



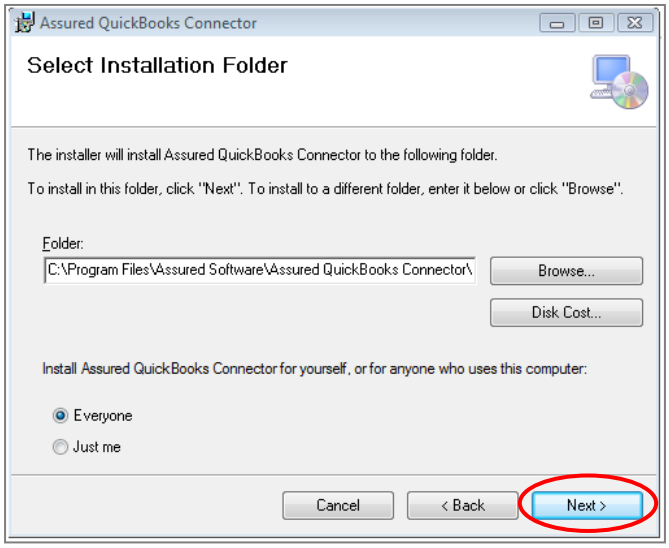
Click "Save File"



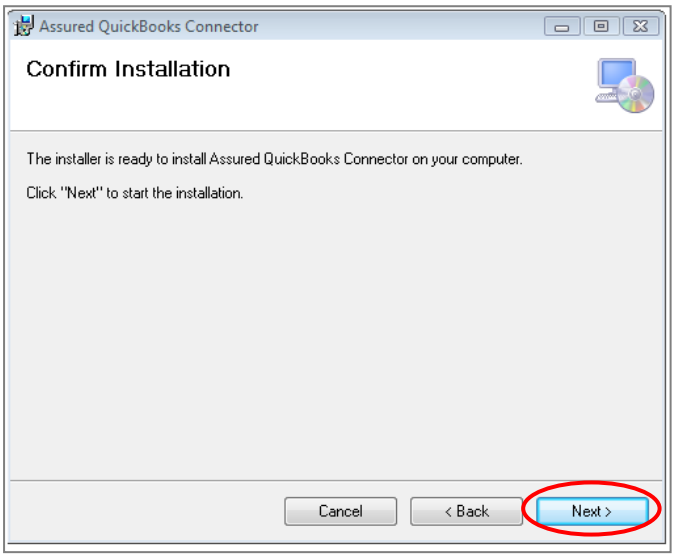
Click "Run"



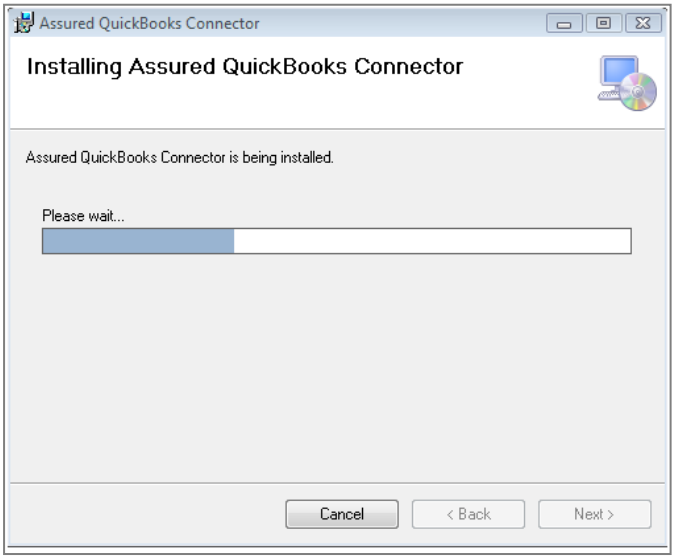
Click "Next"



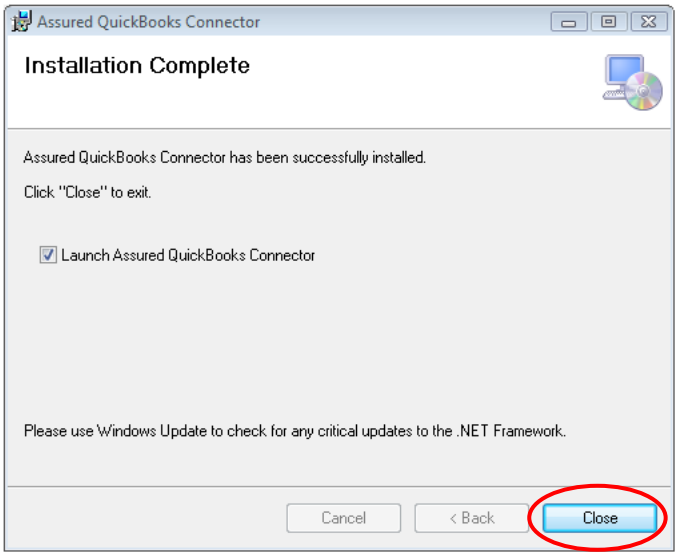
Browse to select a destination folder.
Click “Next”



Click “Next”

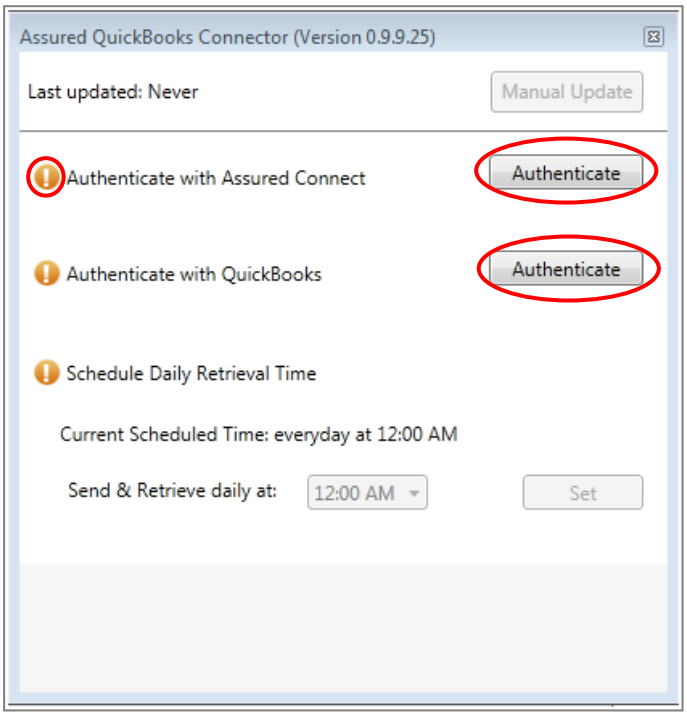


Wait for the install to complete.



Click "Close"

Notice that you can now see the Connector running in your task bar.

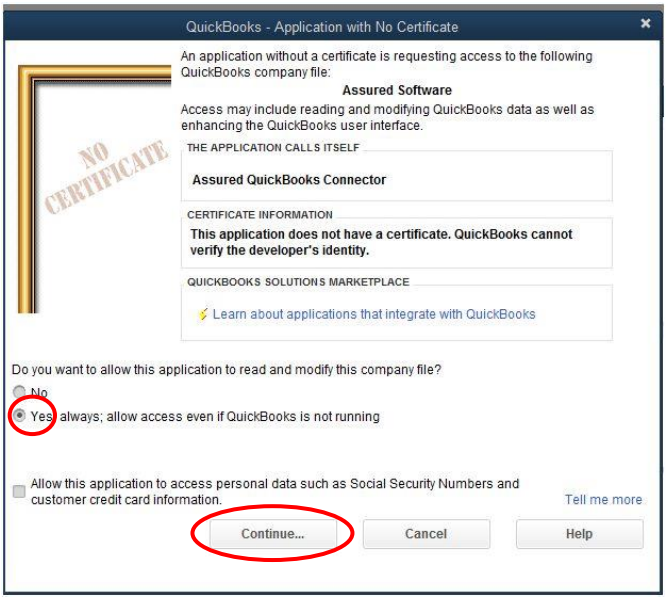


Click "Authenticate" to give the Connector access to data from both JobCheck and QuickBooks.

After you have done this successfully, the "!" icons will become green check marks.

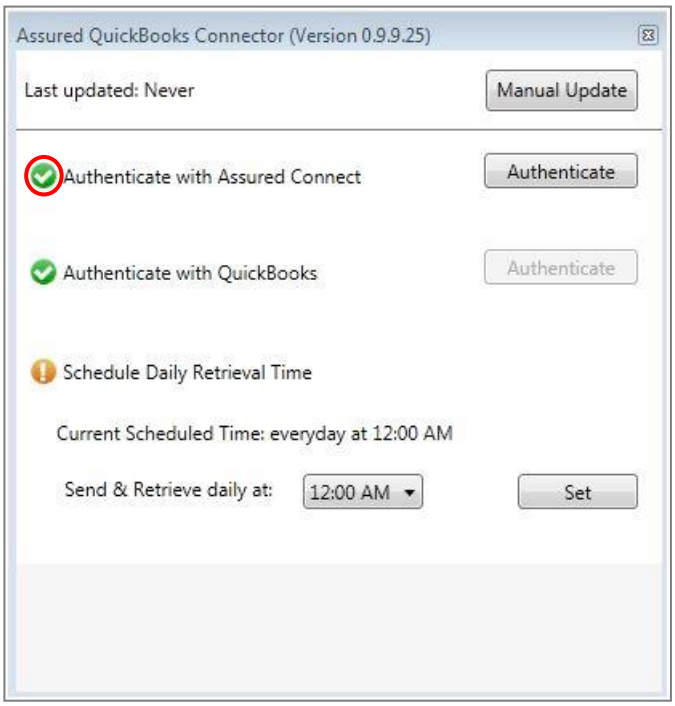
You will only need to authenticate the first time you use the Connector; however, if you change your username and password you will be prompted to authenticate again.

The QuickBooks connector can only be authenticated with the accounting user ID. If you do not know what this login is, please contact your system administrator.



After authenticating with QuickBooks, you will see this application notice.

Click "Yes" and "Continue".



When each configuration requirement is authenticated, a green check mark appears.

There are two ways you may update QuickBooks and JobCheck. Click "Manual Update" to do an update immediately, or select a time when the system will automatically send and retrieve information between QuickBooks and JobCheck for you.

If you experience any trouble with the installation of the Connector, please search our troubleshooting steps here. To learn more about how the Connector works, see the tutorial *"4 - QuickBooks Connector - Sending and Retrieving QuickBooks Data"*.