

# EasyBIZCONNECT Installation & User Guide 2017

## Welcome to EasyBizConnect

The connector provides for common ways to access your QuickBooks company data. This guide allows you to install and configure EasyBizConnect. While the connector provides for interactivity with other database types, the instructions that follow however pertain to installation and configuration of EasyBizConnect to QuickBooks.

## How It Works

EasyBizConnect is a C# windows application that runs on the device where QuickBooks is installed. An initial and once off authentication step must be followed after installation. Multi-user access is **not** required.

EasyBizConnect then creates a sharable cache database and keeps it in sync with your company file using message syncs. This allows you to perform super-fast relational queries on it. It activates built-in services allowing you to seamlessly connect different platforms.

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## Requirements

### Operating System Requirements

- Microsoft Windows Vista, Windows 7, Windows 8 or 8.1, Windows 10
- Microsoft Windows Server 2008, 2012

### Software Requirements

- QuickBooks 2002 or higher
- Updated Windows System

### EasyBizConnect Installation

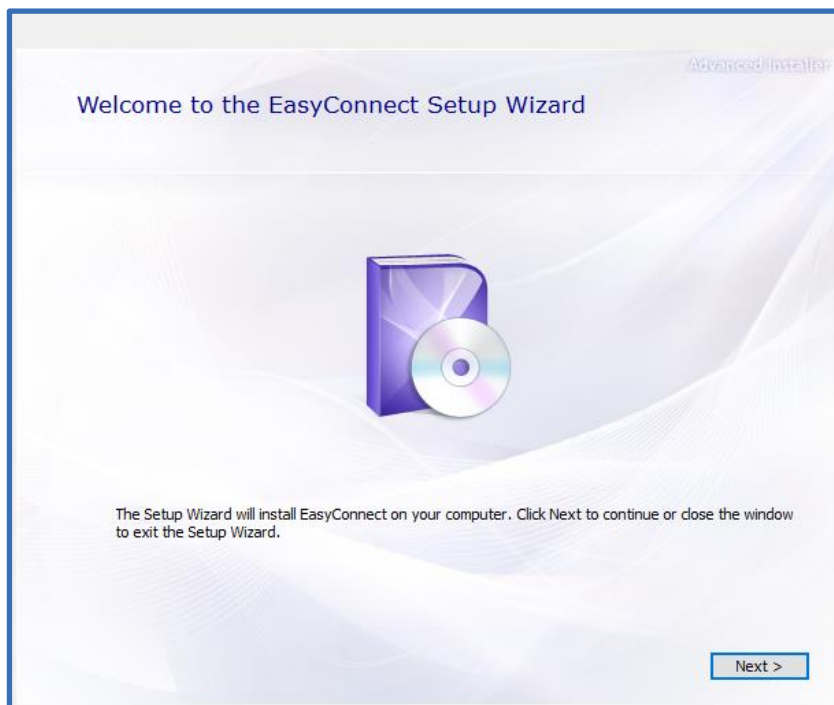
- EasyBizConnect can be downloaded from the link below if not provided for by other media types
  - <http://easyconnect.quickbooks.co.za/dl/EasyBizConnectInstaller.exe>
  - Save the installer to an easy to remember location on your computer

### Prerequisites

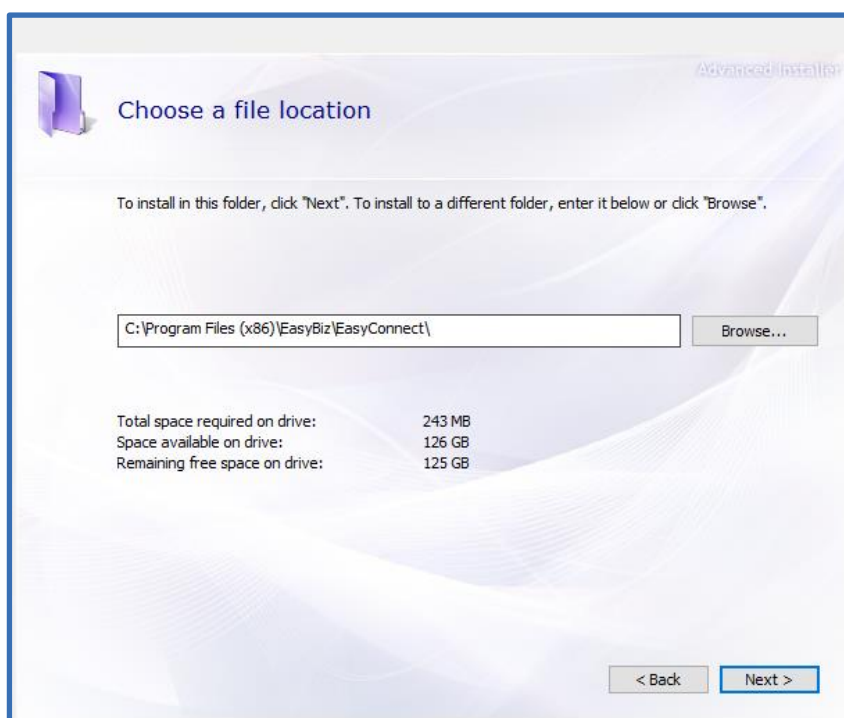
- Make sure the QuickBooks company files you wish to interact with are safely backed up
- Close unnecessary applications to speed up the installation process

## Installation – Program Installer

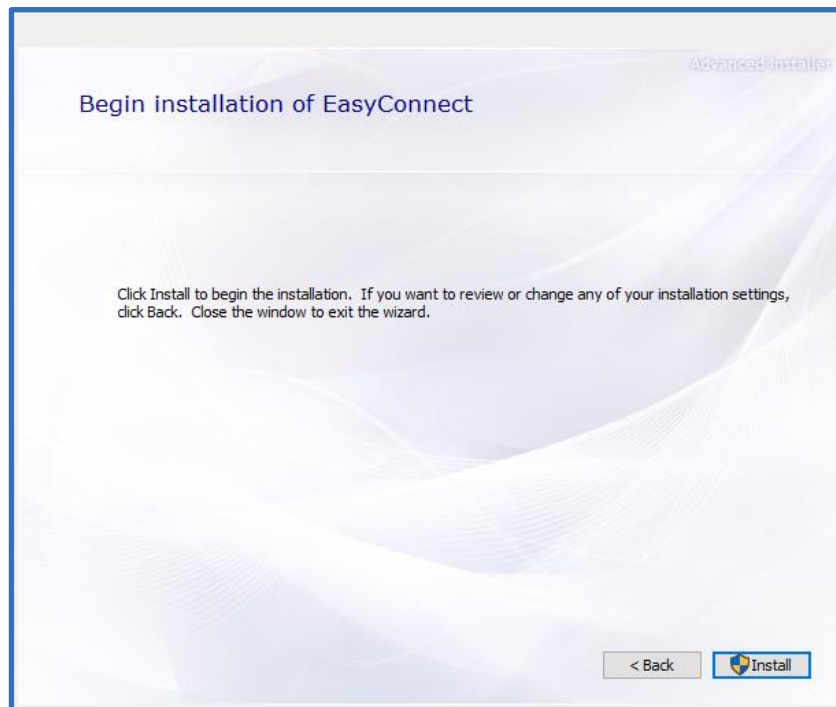
Step 1: Launch **EasyBizConnectInstaller.exe** from its saved location or installation media. Follow the on-screen instructions by clicking on the “**Next >**” button.



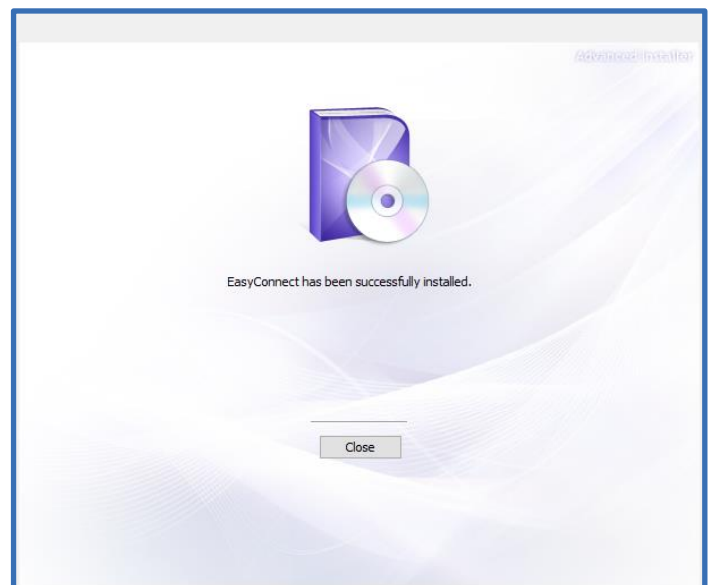
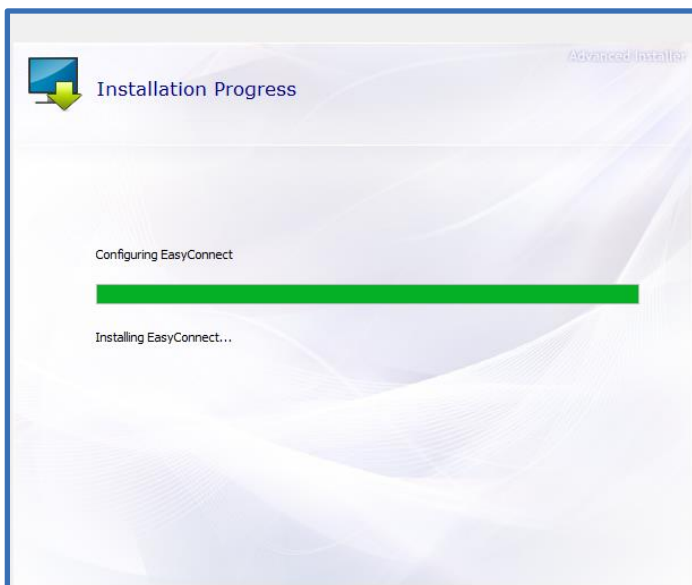
Step 2: Browse file saving location and click “**Next >**” button.



Step 3: Click on **"Install"** to begin the installation. You can easily cancel the process should any errors occur during installation



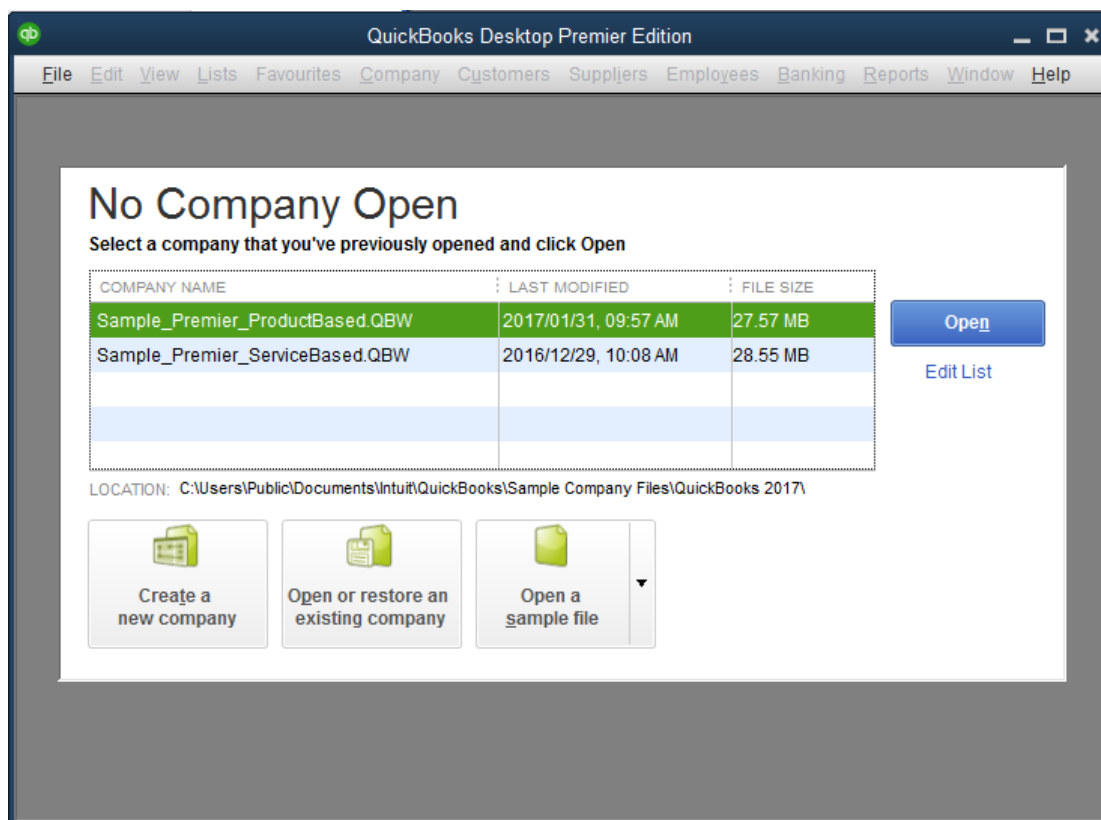
Step 4: Wait for Install to complete. Click **"Close"** to finish install process.



## Initial Program Setup

**Note :** EasyBizConnect must be validated by QuickBooks company file as with any third party application according to QuickBooks specifications. This process allows for controlled access over your company data.

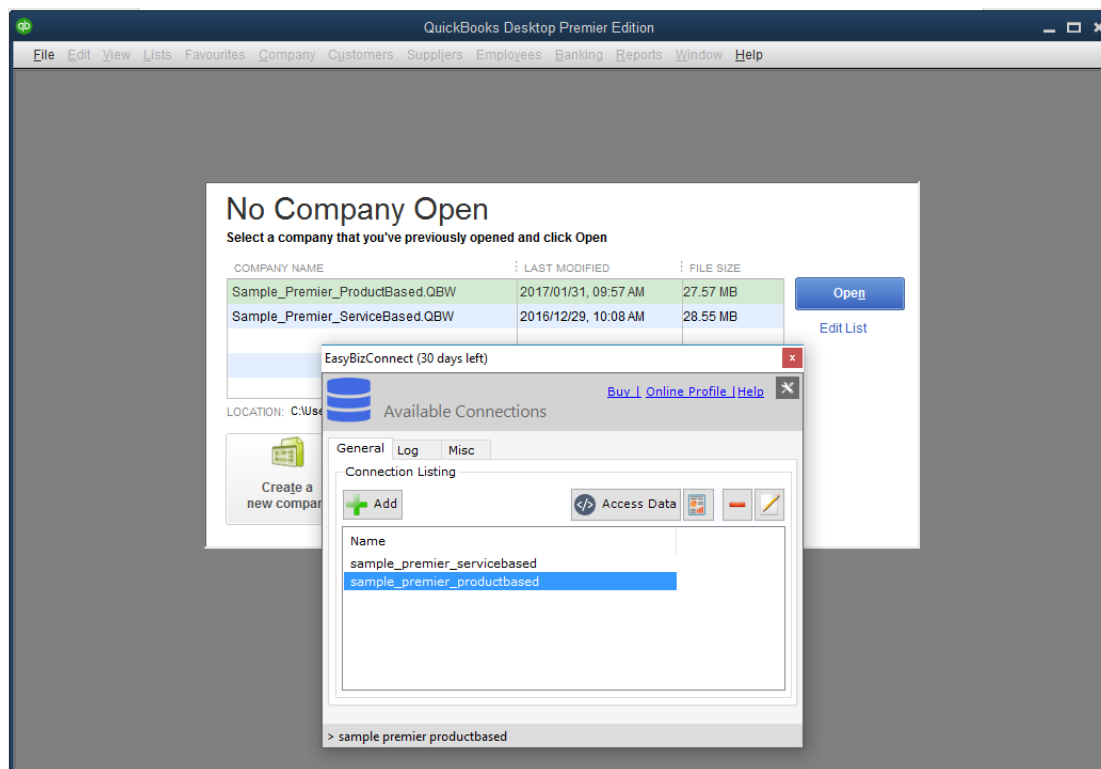
Step 1: Open the company file you wish to engage with in QuickBooks.



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### Step 2: Launch EasyBizConnect

EasyBizConnect automatically lists QuickBooks companies as represented by the image below. Please choose the same company.

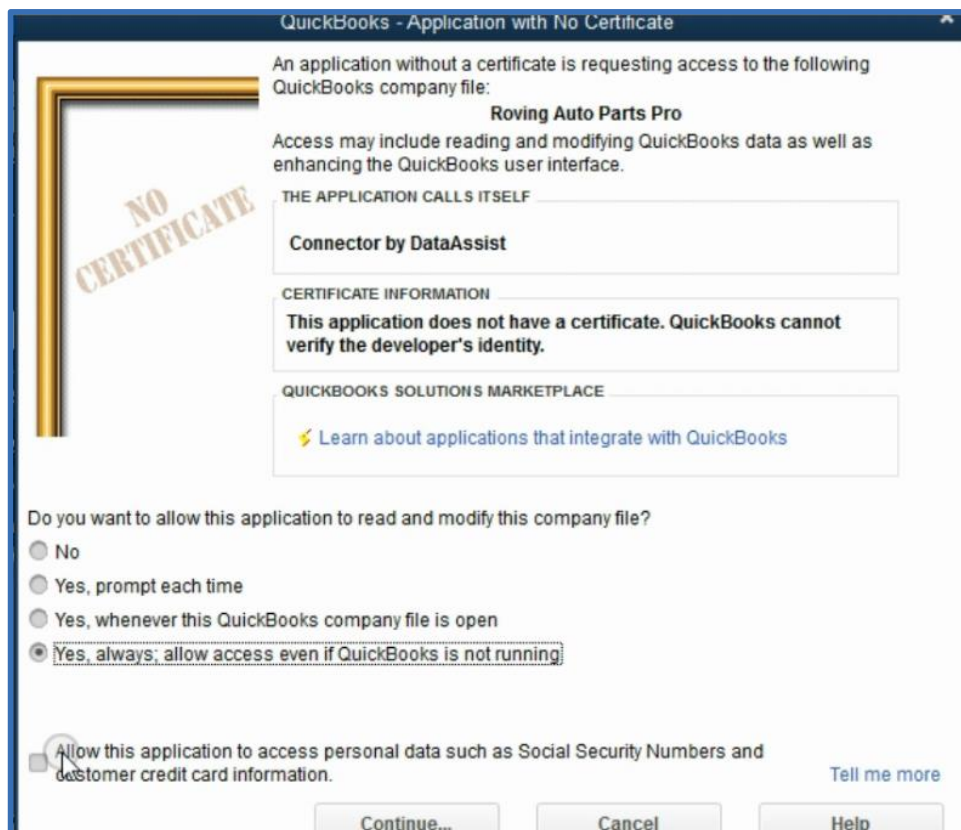


Step 3: Select the company from the EasyBizConnect list. QuickBooks will require an initial validation option. Choose your preferred method.

Select the "Yes, always allow..." option if you would prefer to skip this validation process in future.

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Please choose a validation mode in QuickBooks

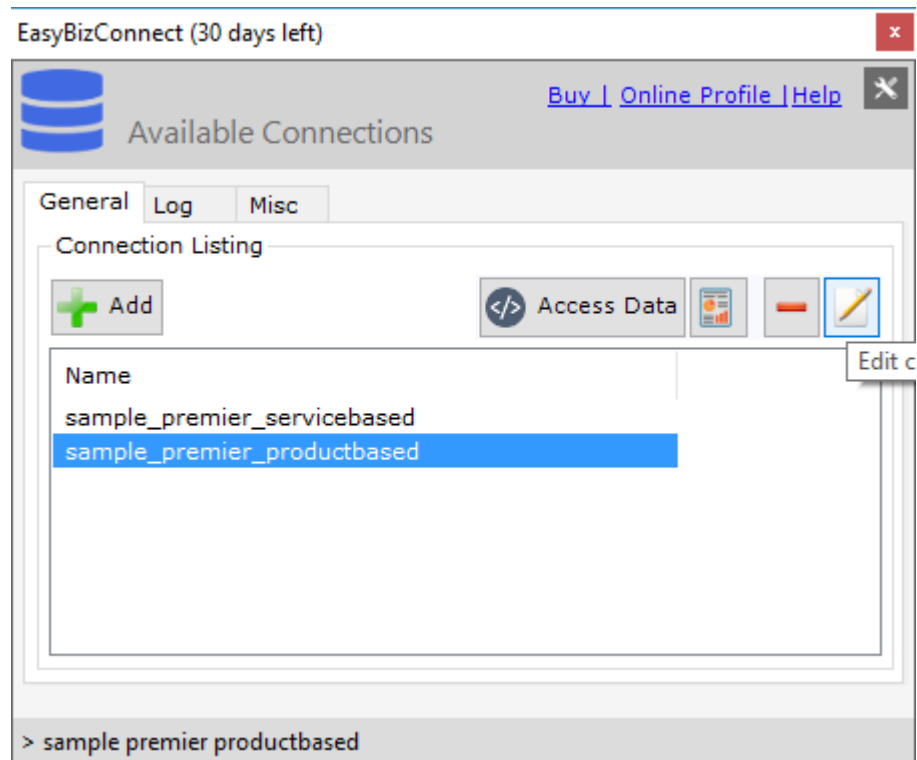




## Program Usage

Highlight the company you wish to engage with. Notice EasyBizConnect's additional functions are now available for use. Click on the listed buttons below to launch its associated applications such as:

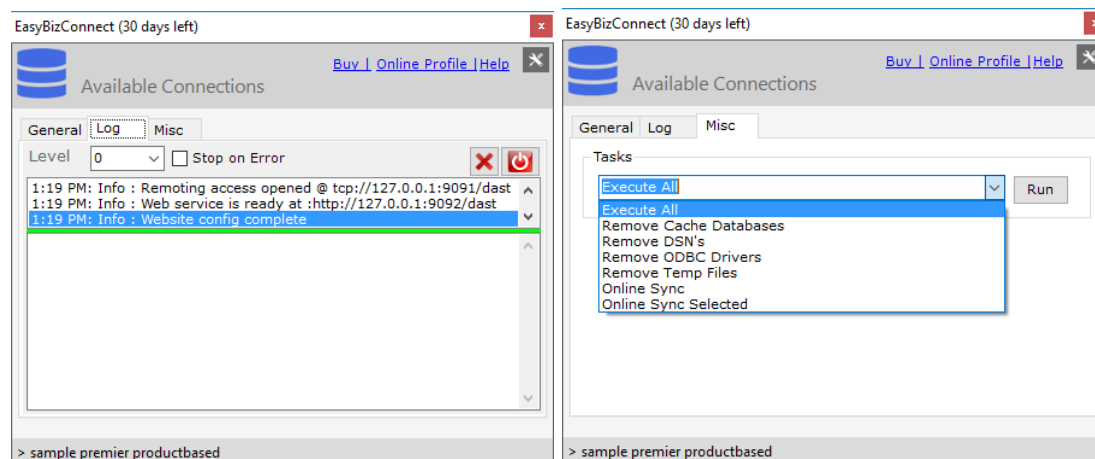
- Developer Tools



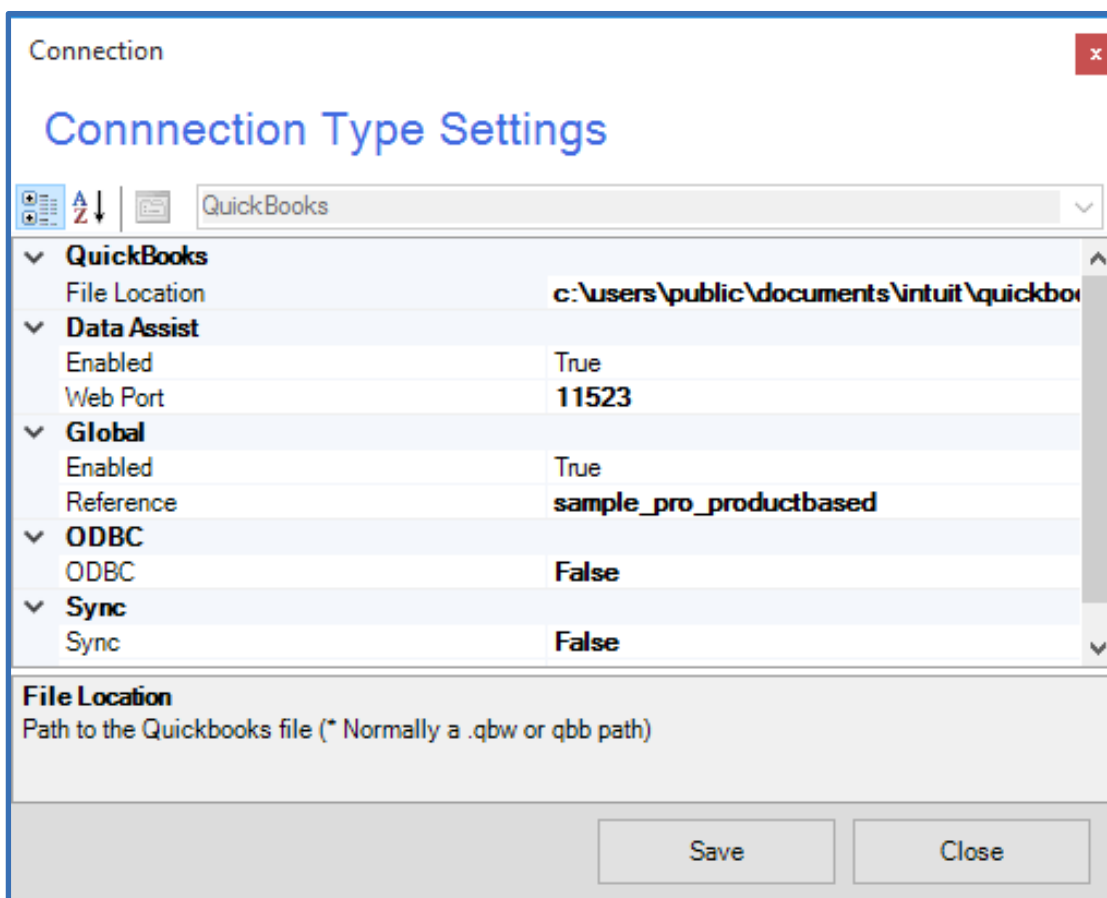
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### Other Options

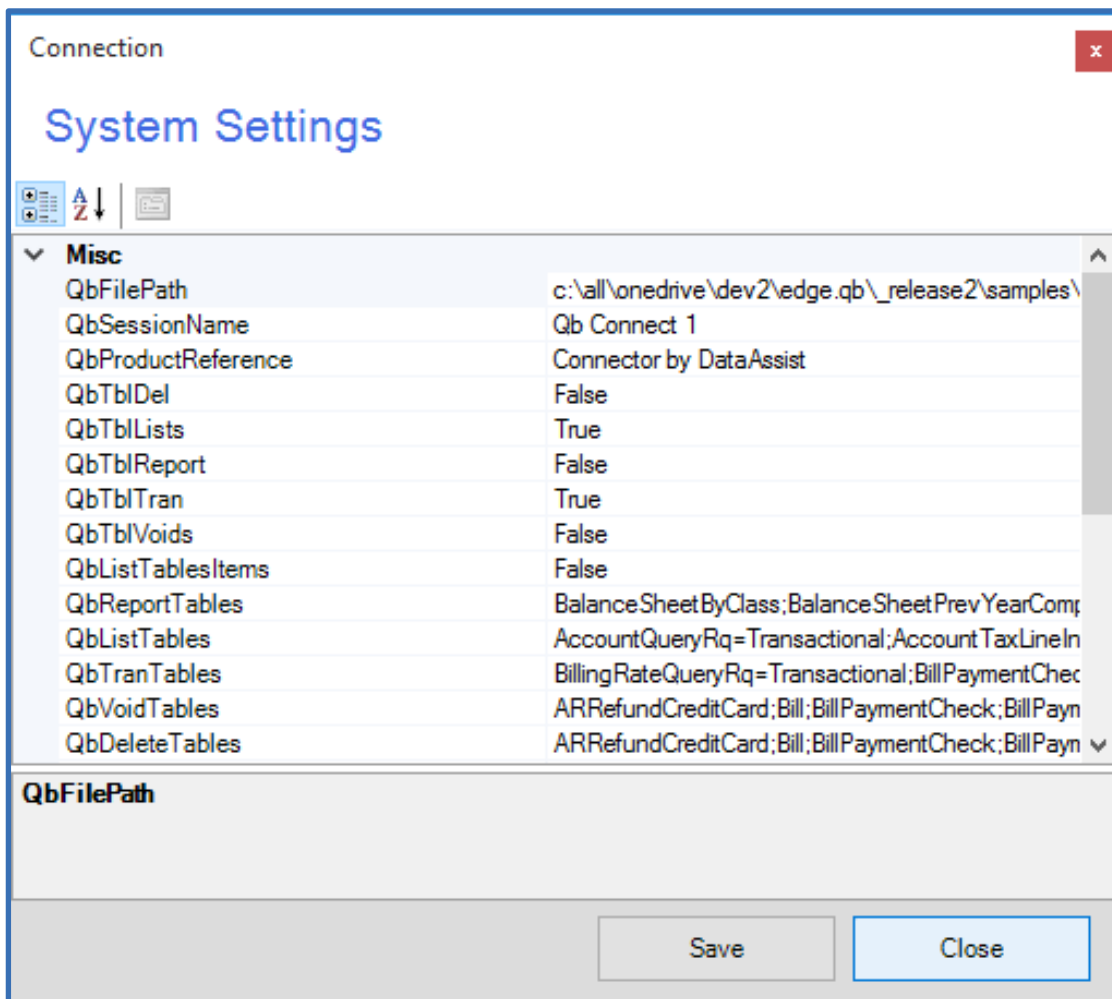
- Companies can be manually added, modified or removed as needed. Additional configuration settings and other advanced options are available and may become applicable in certain environments.
- A few of these routes/options are show below.
- Access EasyBizConnect's other functions like logs and activities.



- Custom Connection settings

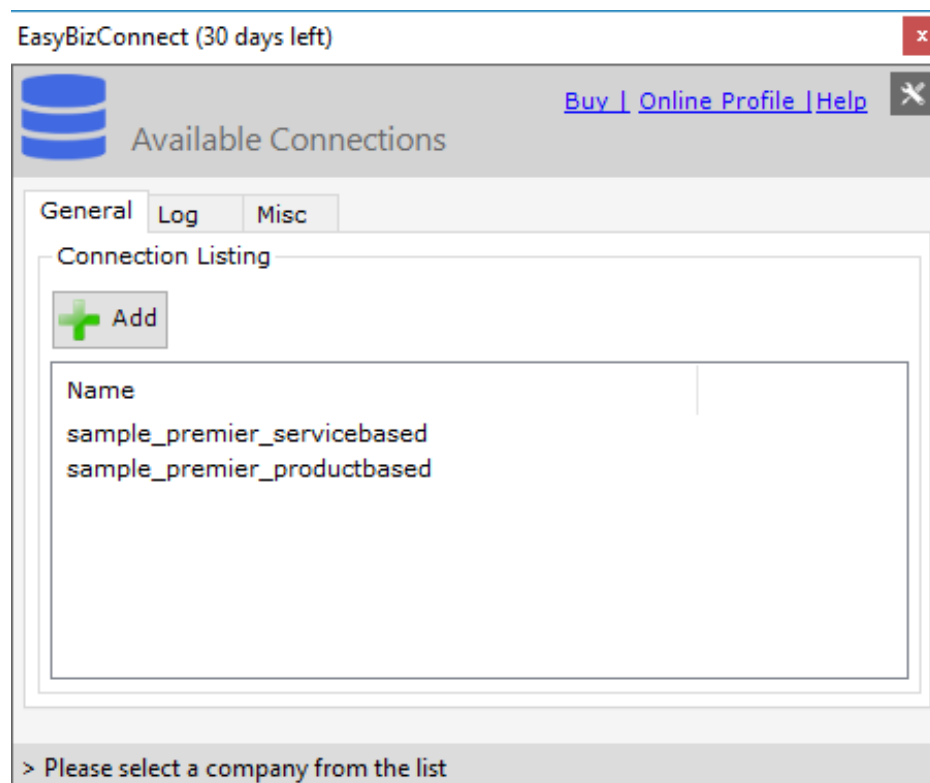


- Custom system settings

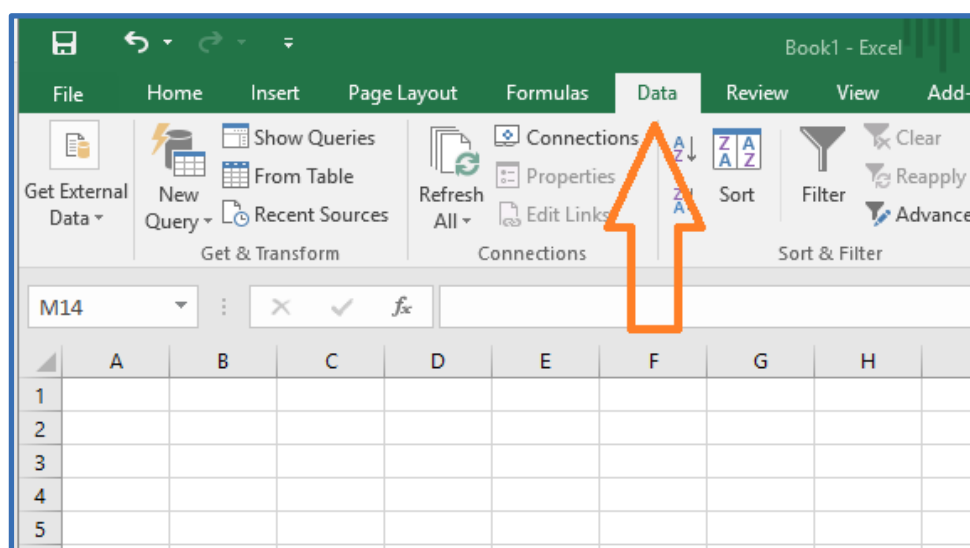


**NOTE: The screen captures below may differ according to your Microsoft Excel™ installation.**

Step 1: Make sure EasyBizConnect is running. Please refer to the installation training video or install document should EasyBizConnect not be installed.

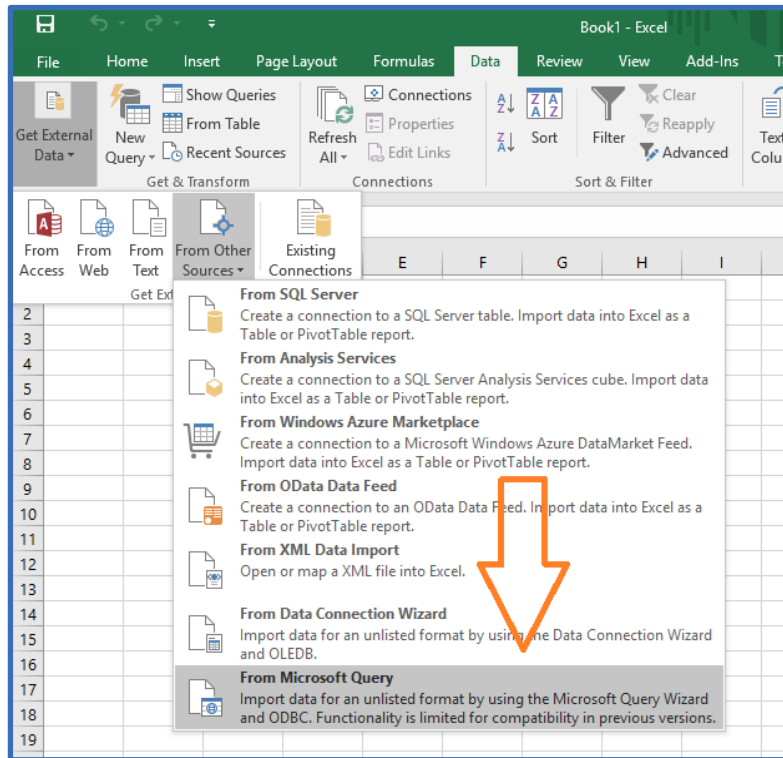


Step 2: Open Microsoft Excel™ and create a workbook or open an existing workbook. Then select the "Data" tab.

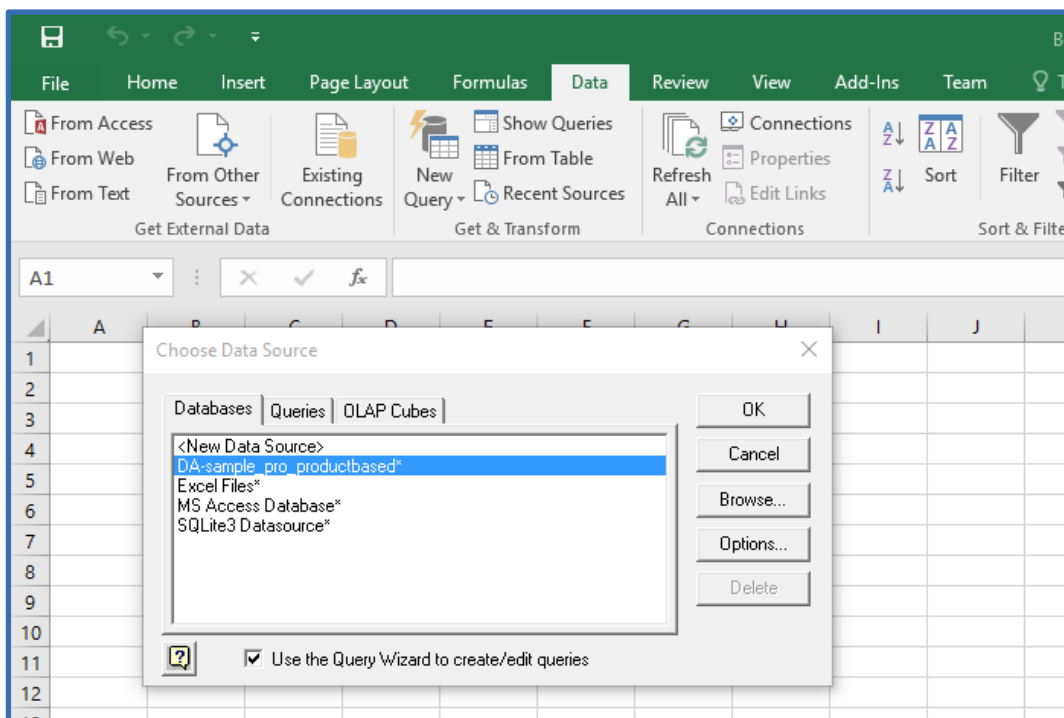


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Step 3: Select "Get external data" menu option. Use the "From Microsoft Query" to access your data. This feature provides access to various connections listed in your device's ODBC settings.

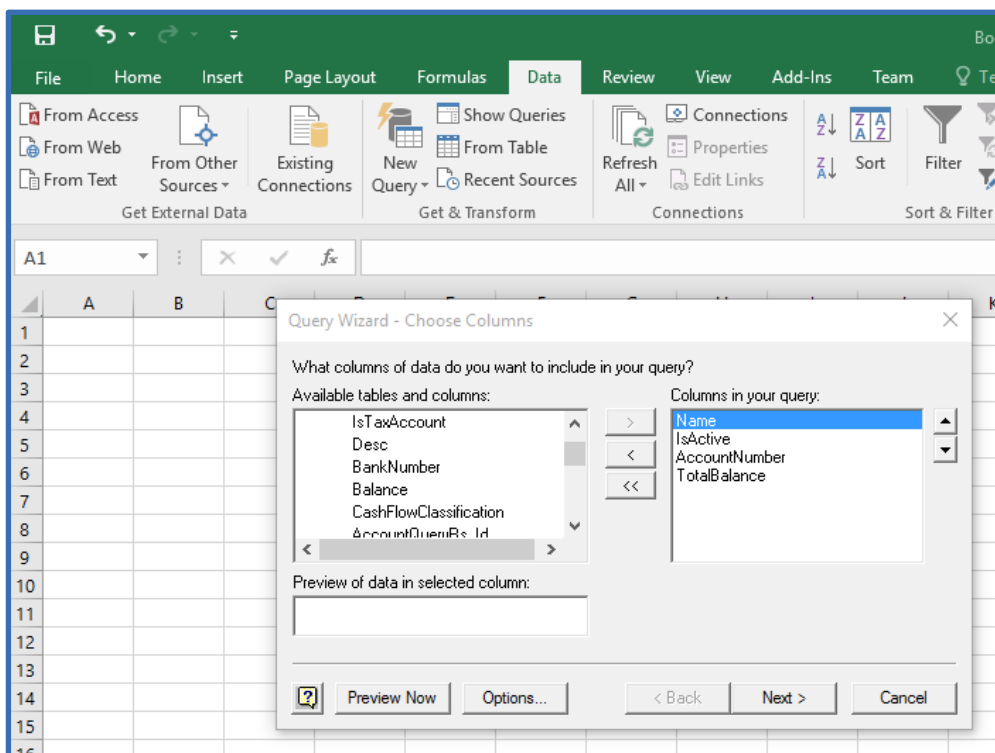


Step 4: Select the company from the list of data sources as shown below. All companies linked by EasyBizConnect will appear with a "DA-" as shown below.

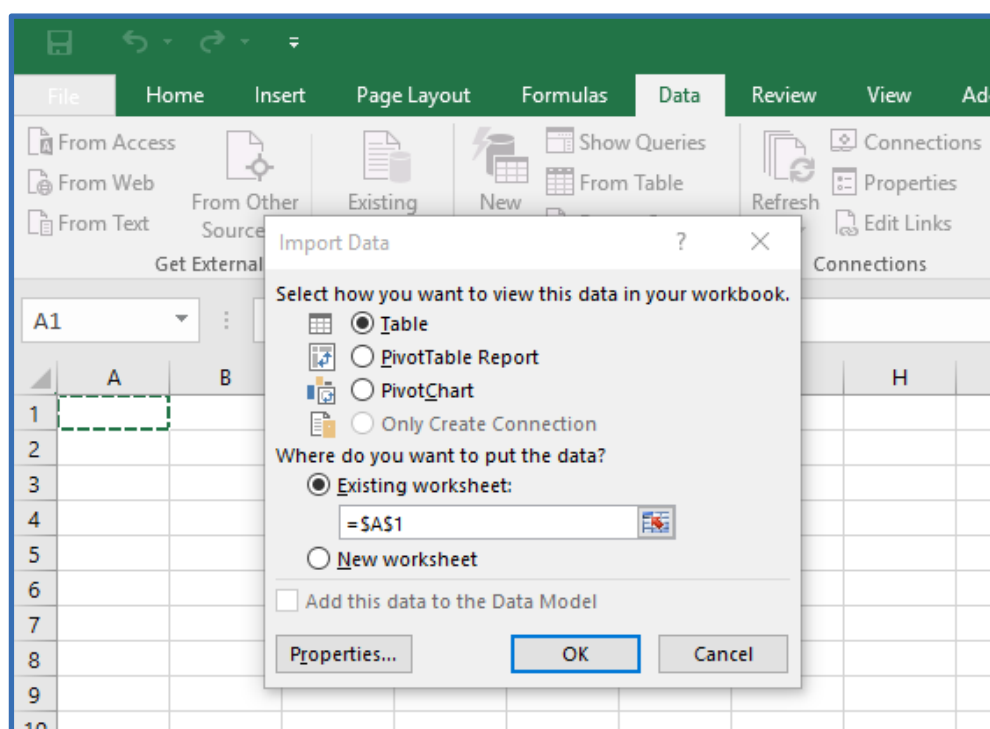


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Step 5: Choose the columns from the different tables available. Then click "Next" to follow through with the Wizard. The Wizard allows you to filter and sort your data. Additionally, you can use Excel's features to re-order and filter your data at a later stage.



Step 6: Your selected data is now being loaded into the worksheet from the starting cell position. Select the desired options and click the "OK" button.



## Sample Data

Here's a look at some sample data below. You can now filter, sort and start linking your data to charts or other worksheets.

The screenshot shows the Microsoft Excel interface with a table named 'Table\_Query\_fro'. The table has four columns: Name, IsActive, AccountNumber, and TotalBalance. The data is as follows:

	Name	IsActive	AccountNumber	TotalBalance
2	Current	1	1000	84585.44
3	Accounts Receivable	1	1100	293824.94
4	Stock	1	1210	58199.03
5	Undeposited Funds	1	1200	626.22
6	Fixed Assets	1	1500	0
7	Accumulated Depreciation	1	1700	0
8	Furniture and Fixtures	1	1510	0
9	Land	1	1560	0
10	Leasehold Improvements	1	1590	0
11	Office Equipment	1	1520	0
12	Vehicles	1	1640	0
13	Security Deposits Asset	1	1870	0
14	Accounts Payable	1	2000	73552.55

## Contact Details

For additional information or to set up a meeting, please do not hesitate to contact us at:

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