

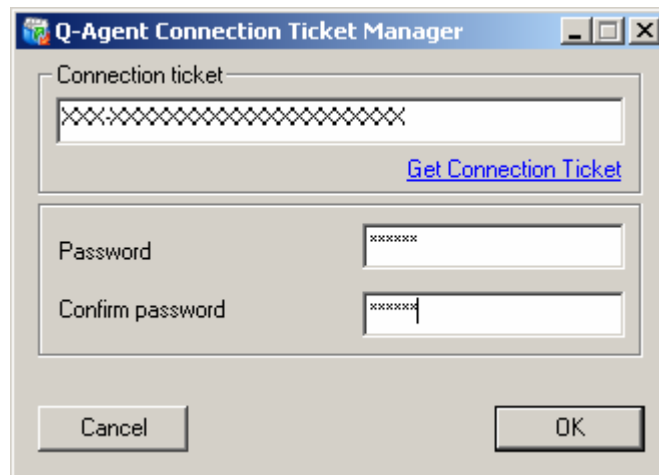
# Q-Agent

## Installation manual

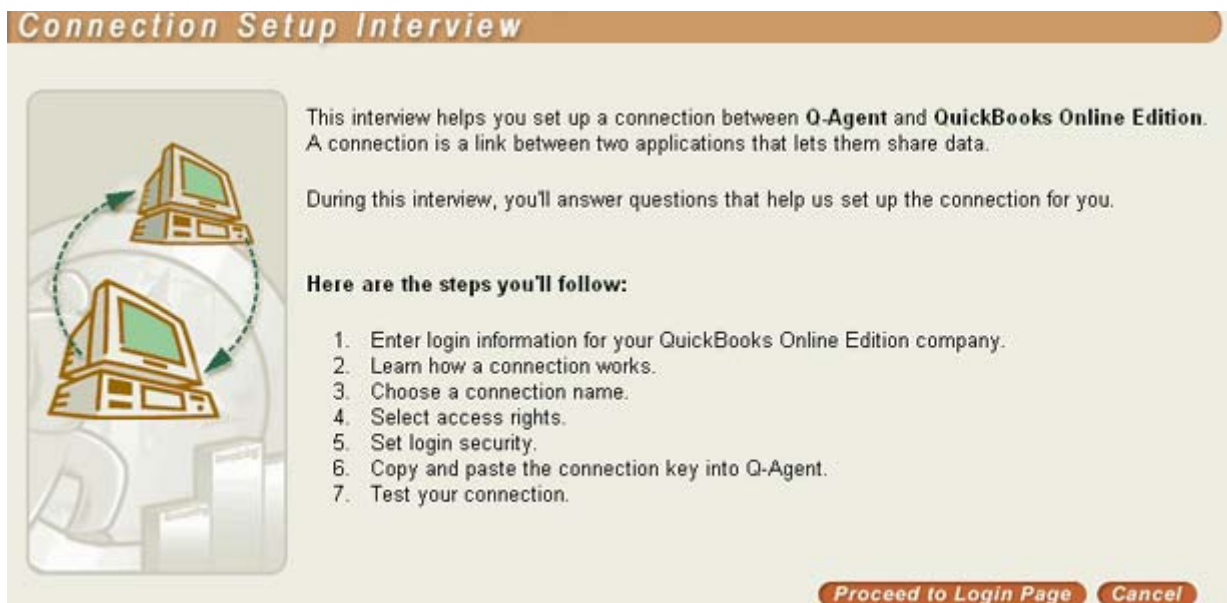
Version 1.3

## Steps to install the Q-Agent

- Make ActiveSync connection to the host PC
- Start setup program
- Install program will prompt you to install .NET Compact Framework 2.0. If you haven't installed it before, please install it
- Next you will be offered to install Q-Agent application
- The next required component is SQL Mobile. If you haven't installed it before, follow the instructions on the screen to install it
- Setup will ask you to put a connection key and password



- This one is used to synchronize data with your Quick Books Online account. If you haven't got the connection key do the following:
  - Go to Online Edition Connection Setup for Q-Agent
  - Click on "Proceed to login page" button



- Enter your Login/Password and click on "Login" button or press enter

### Log in to QuickBooks Online Edition

Login Name:

[Can't remember your login name?](#)

Password:

[Don't know your password?](#)

Login

- Click "Continue" button

### Connection Setup Interview



#### How does a connection work?

A connection lets data flow in both directions. Using Q-Agent, you can:

- Send changes or additions to your QuickBooks Online company data.
- Copy data from QuickBooks Online to Q-Agent.

**Caution:** Once data has been shared, you cannot undo it or delete it in an automated way. If you need to make adjustments, you'll need to make individual edits.

Intuit has not yet confirmed the features nor the identity of Q-Agent. We strongly suggest that you verify these issues before allowing any sort of data transfer.

Intuit is not responsible for the accuracy of data sent to QuickBooks Online from any other application.

Continue

Cancel

- Click on "Create New Connection" button
- Enter Connection Name, for example "Q-Agent connection" and Click "Continue" button

### Connection Setup Interview



#### Connection Name


**Where will I see the name?**  
In QuickBooks Online, you see the connection name in the Activity Log.

**Connection**  
**Name:**

**Continue** **Cancel**

- o Choose Access Rights and click "Continue" button

### Connection Setup Interview



#### Access Rights

**How does this choice enhance security?**  
This choice lets you control which data can be shared by this connection.

**Access Rights:**

- ☒ **All Accounting** - Share data related to Customers & Sales and Vendors & Purchases plus other data such as the Employee List, deposits, fund transfers, journal entries, budgets, reconciliation, and the Chart of Accounts.
- ☐ **Limited** - Restrict access to one or both of the following:
  - ☐ **Customers & Sales Only** - Share data related to customers or sales, such as invoices, sales receipts, credit memos, refunds charges, credits, statements, payments received from customers, time sheets, the Customer List, and the Products and Services List.
  - ☐ **Vendors & Purchases Only** - Share data related to vendors or purchases, such as bills from vendors, checks, cash purchases, credit card purchases, and the Vendor List.

No matter which choices you make, QuickBooks Online administration data, such as Subscription Information and the User List are **not** shared.

**Continue** **Cancel**

- o Choose Security type. Please choose "NO" to login security. Intuit does not allow us to get QB Online UserId and password from users. If you select another security

type Q-Agent won't work properly. Your connection will 100% secure since connection key will be encrypted on the device

## Connection Setup Interview



### Login Security

With **Login Security** set to **Yes**, each time anyone tries to use this connection, the user must first log into your QuickBooks Online company. Then that user receives a temporary login key to paste back into Q-Agent.

To protect your company data, Intuit recommends restricting access to the smallest number of users. If every user of QuickBooks Online is also a user of Q-Agent, it might be appropriate to choose the companywide level of security. Otherwise select only those users who are also users of Q-Agent.

If there are additional Q-Agent users who need to use this connection, add them as users of your QuickBooks Online company after you complete this interview. To prevent them from viewing accounting data within your company, set them up as Regular Users with None for their access rights.

### Turn on login security?

- ☒ No. Anyone who can run Q-Agent on this computer can use the connection.
- ☐ Yes. Allow all Q-Agent users to log in to use this connection.
- ☐ Yes. Allow only these users to use this connection:
  - ☒ Q-Agent Developer

Create Connection

Cancel

- Please choose "I still want to turn off login security" when asked by Pop Up dialog
- Now you have the connection ticket

## Connection Setup Interview



### Copy and paste the connection key.

The connection key is a private code that lets your copy of Q-Agent connect to QuickBooks Online. This is the type of key you copy only once for each connection you set up.

#### 1. Click **Copy to Clipboard**

2. Keep this window open and follow instructions from Q-Agent to insert the key.

(You can use Ctrl+V to paste.)

### Connection Key:

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

**Copy to Clipboard**

### Don't paste the key anywhere else.

Do not make any additional copies of your connection key or write it down anywhere. It should be stored only in Q-Agent. In the unlikely event that you need to retrieve the connection key, you can rerun this interview and reselect this connection name.

**Continue**

**Cancel**

- Enter the connection ticket and any password (not QB Online password). This password will be used to encrypt connection key. Q-Agent will ask you for this password during synchronization. Ticket Manager application will be available on your host PC, so you will be able to change your password and connection ticket whenever you want
- Go to "Programs" menu on your device and run Q-Agent application
- If you have specified connection ticket, synchronize button will be available
- Run the first time synchronization to get data from your Quick Books Online account