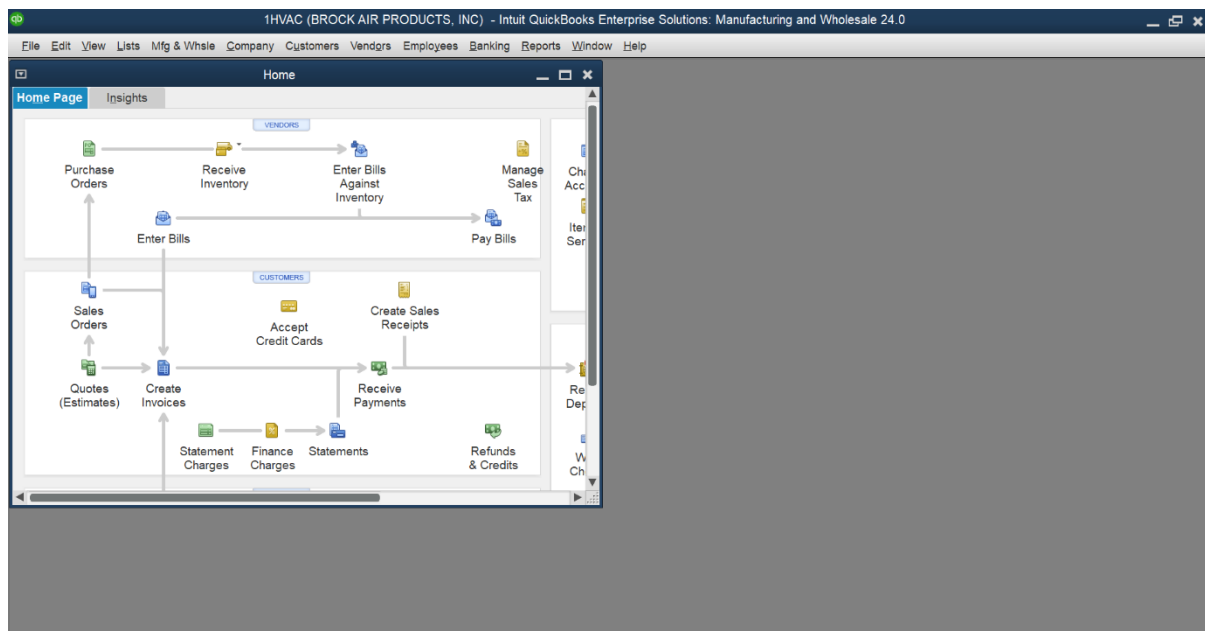
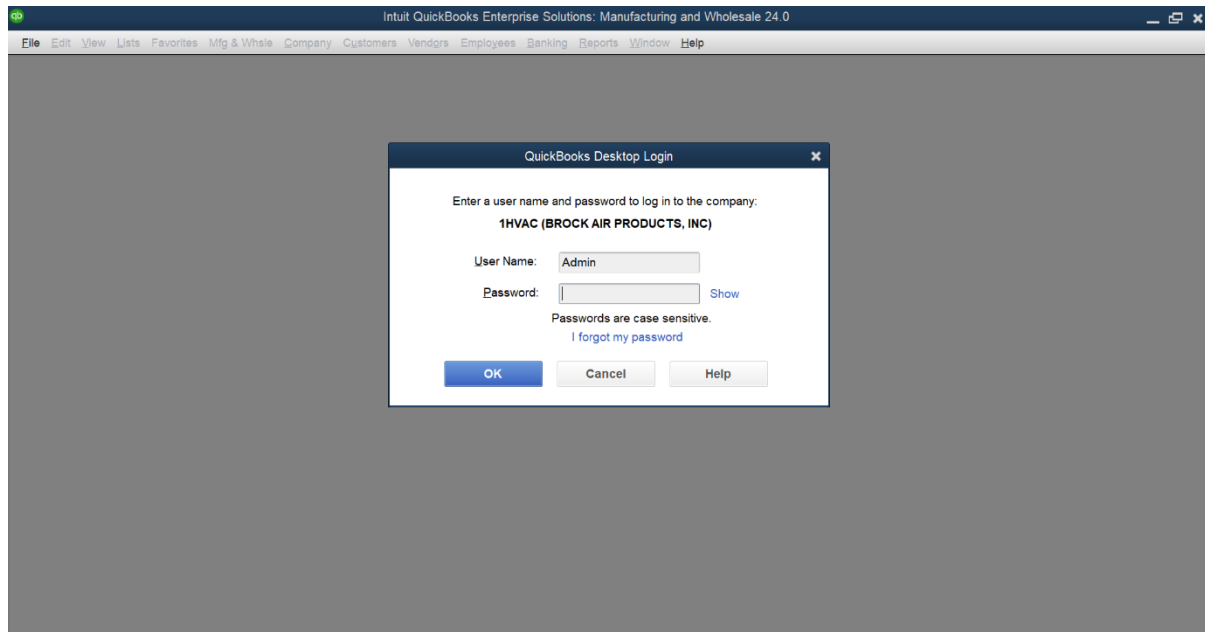


QODBC Installation and Setup for QuickBooks Desktop

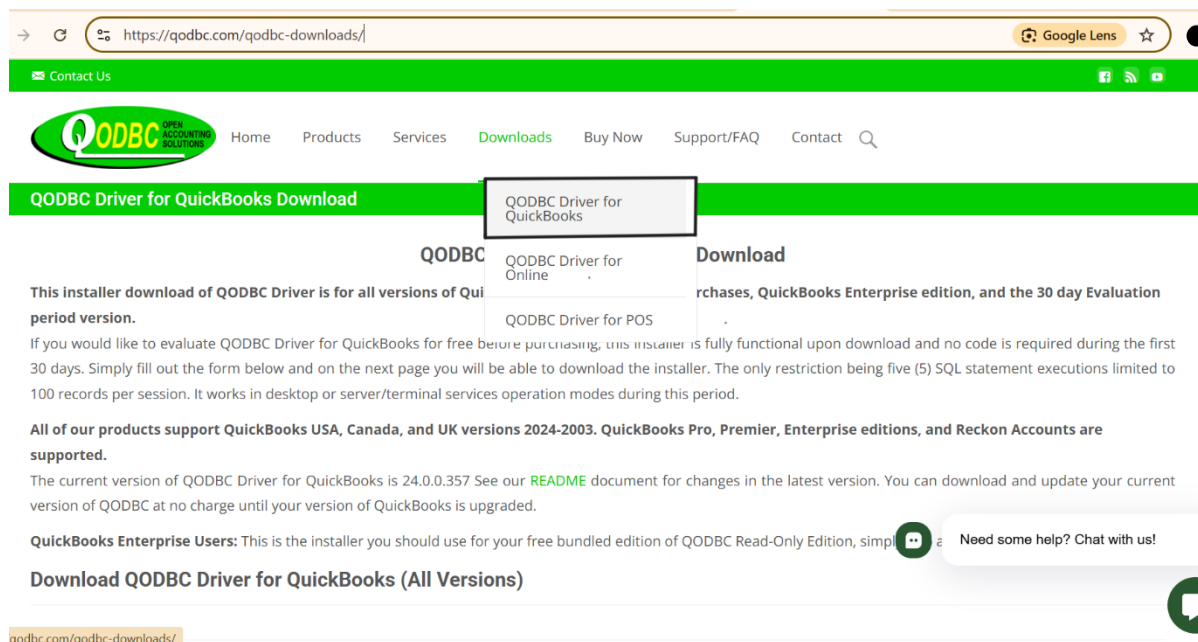
Initial QuickBooks Setup

- First, make sure the QuickBooks application is installed on the machine. QODBC cannot access your QuickBooks company file data unless QuickBooks is installed on the machine.
- Open the QuickBooks application, log in using admin credentials, and close any pop-up dialog boxes that may appear to ensure uninterrupted functionality.



Installing QODBC

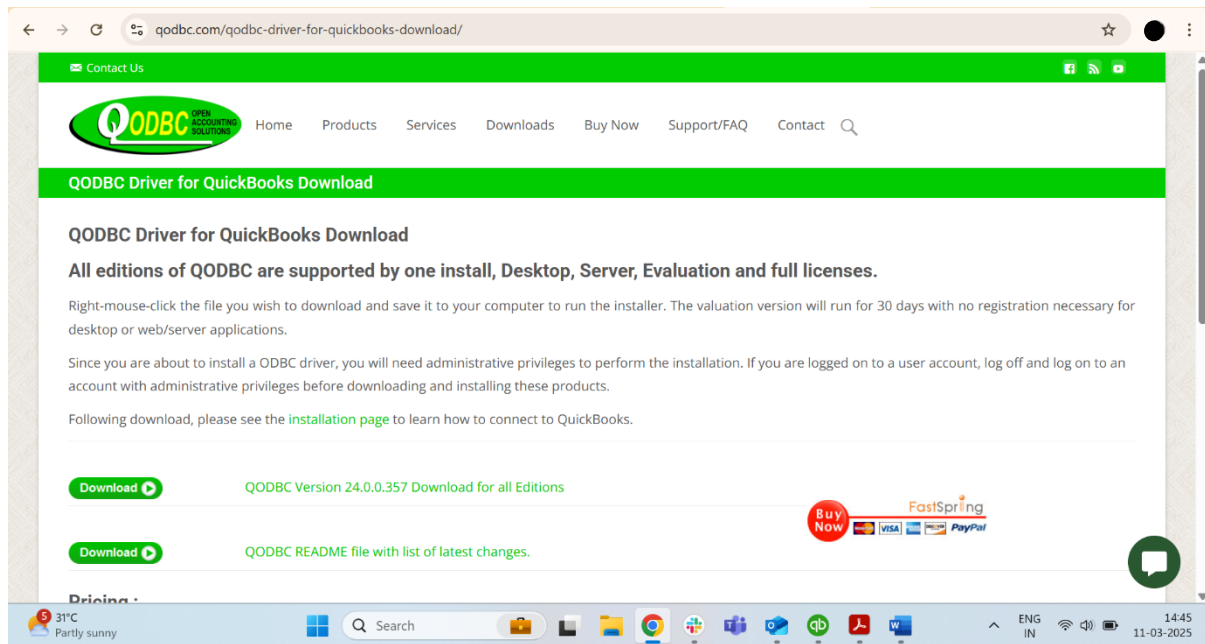
- Download the QODBC Driver for QuickBooks [here](#) , navigating to the "Downloads" section, and selecting **QODBC Driver for QuickBooks**, as shown in the screenshot below.



- Scroll down until you see a section like this, then fill out the necessary details and click **Download QODBC** to proceed with the download.

A screenshot of the QODBC website's download form. The browser address bar shows 'qodbc.com/qodbc-downloads/'. The website has a green header with the QODBC logo and navigation links: Home, Products, Services, Downloads (highlighted), Buy Now, Support/FAQ, and Contact. Below the header, a green banner reads 'Download QODBC Driver for QuickBooks (All Versions)'. The form contains several input fields: *Name, *Company, *Email, Mailing Address, City, State, Zip/Postal Code, Phone, and How did you hear about our products??. A green 'Download QODBC' button is at the bottom right. A chat button is also visible in the bottom right corner.

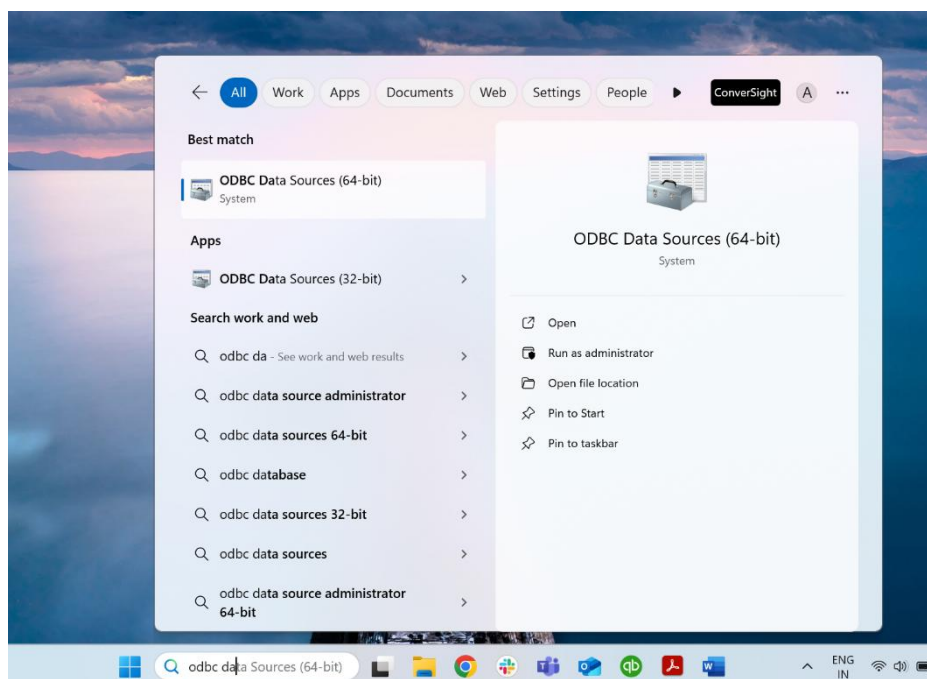
- Click on the **Download** button next to **QODBC Version 24.0.0.357** under the "Download for all Editions" section to begin the download.



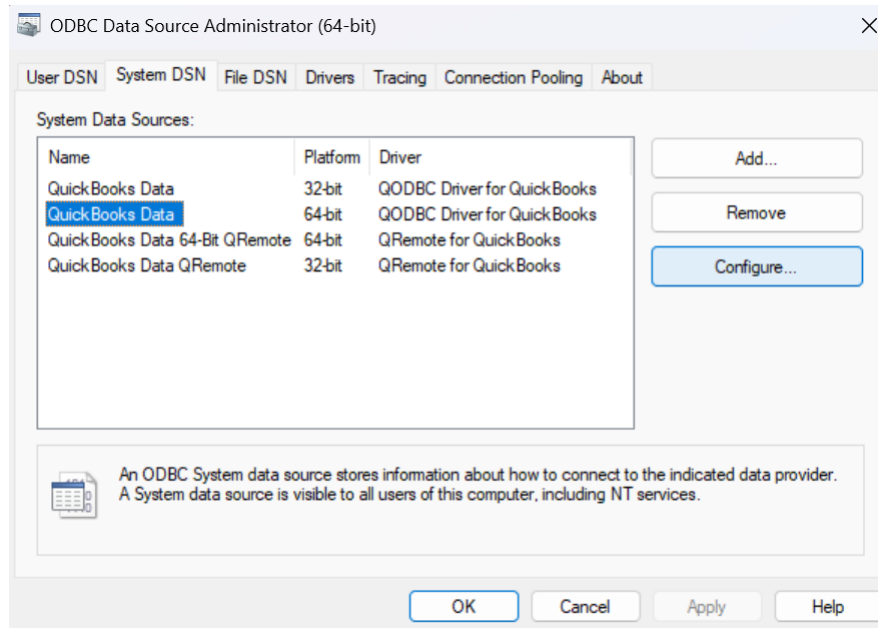
- Once the QODBC Driver for QuickBooks is downloaded, locate the installer file and double-click to run it. Follow the on-screen instructions to complete the installation process, including agreeing to the terms and selecting the installation location.

Setup QODBC for QuickBooks

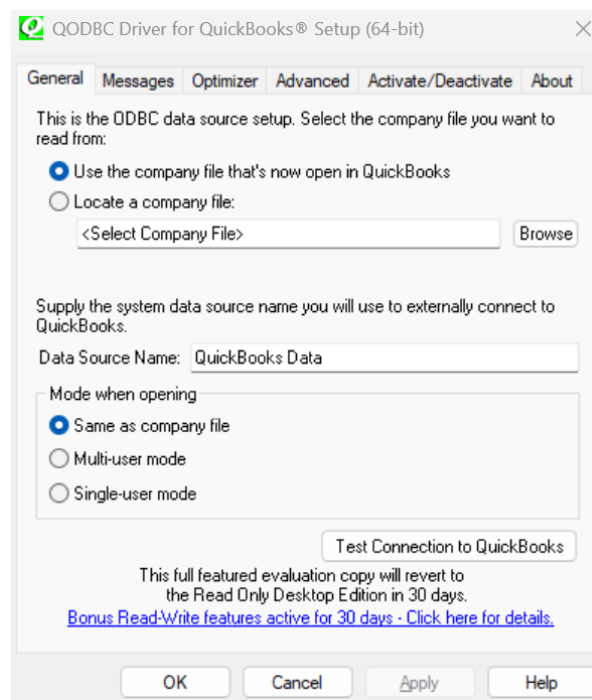
- Open **ODBC Data Sources (64-bit)** from Start



- Under System DSN select **QuickBooks Data 64-bit** and then select **Configure**.

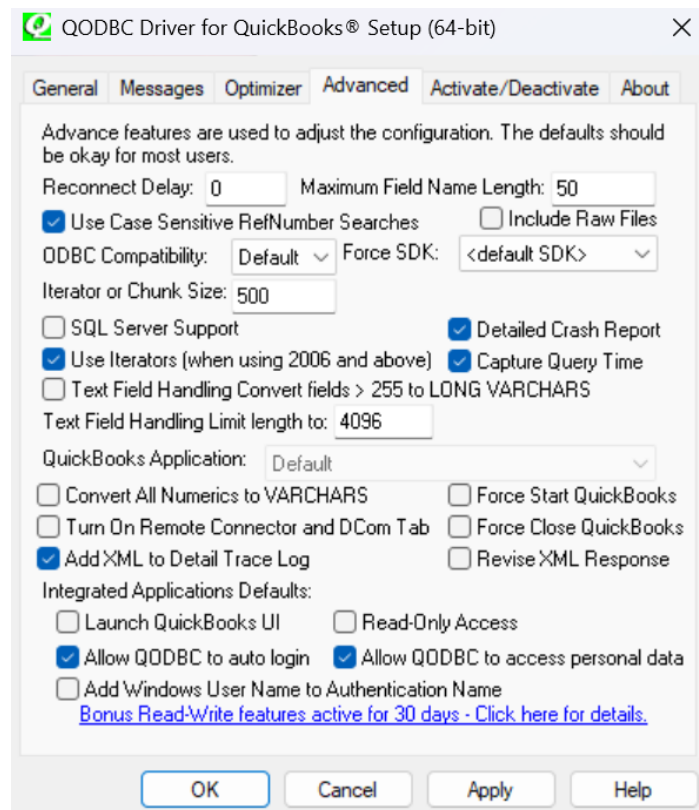


- This will open a **QODBC Driver for QuickBooks Setup** screen.

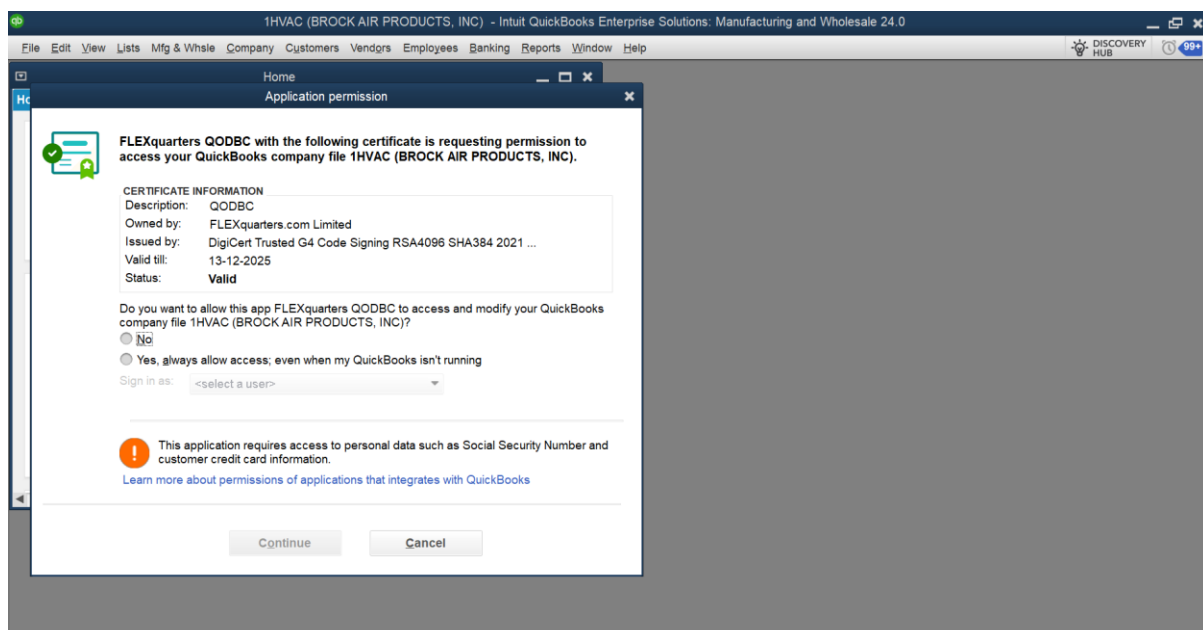


- Ensure that under the **General** tab, the **company file option** is set at “Use the company file that’s now open in QuickBooks” and **Mode when opening** is set at “Same as company file”.

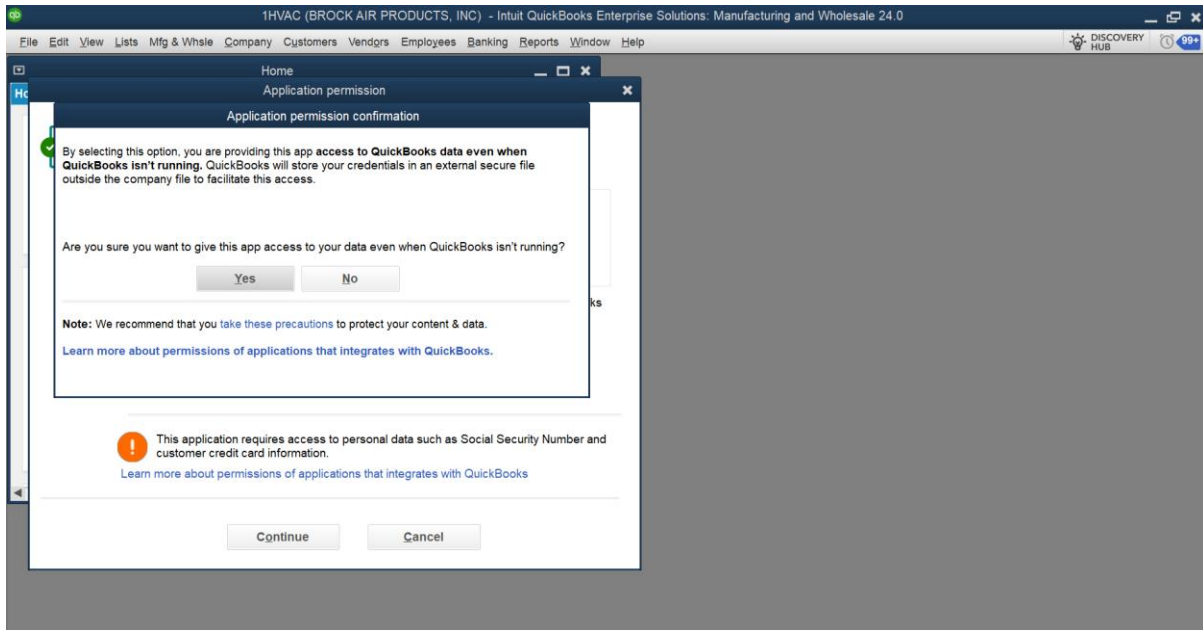
- Navigate to **Advanced** tab and ensure that under **Integrated Applications Defaults**, “Allow QODBC to auto login” is enabled and click **Apply**.



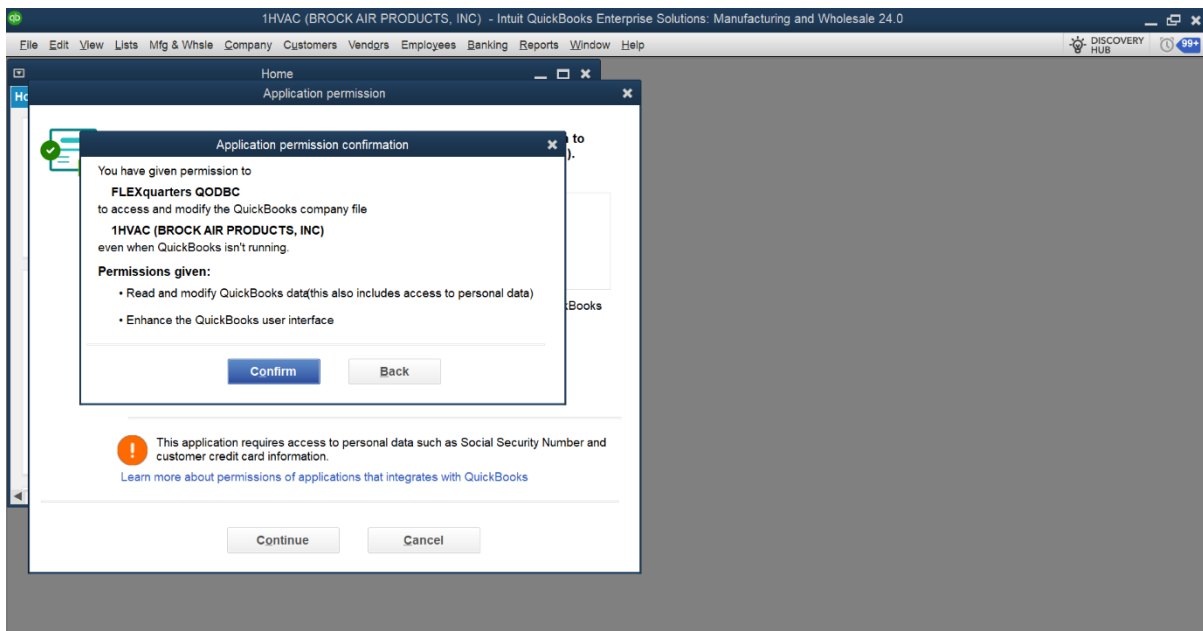
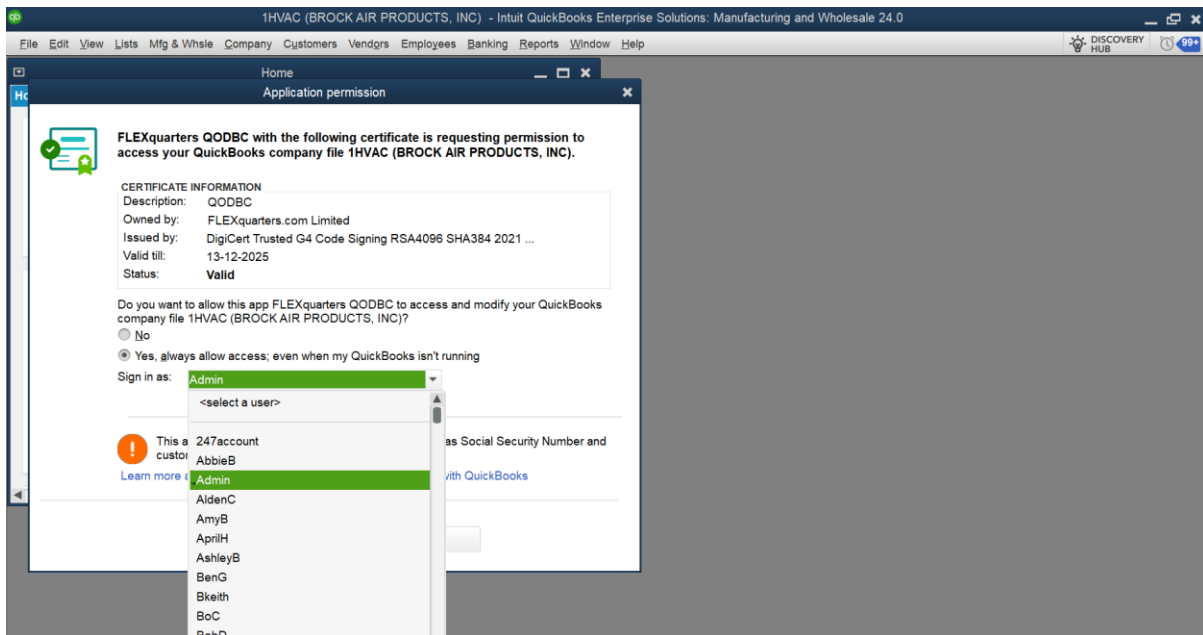
- Navigate to **General** tab and click on **Test Connection to QuickBooks** button to determine if you have a proper installation and settings with QuickBooks and a company file open. This will open an Application permission dialog box in QuickBooks application as seen below. Select “Yes, always allow access: even when my QuickBooks isn’t running”.



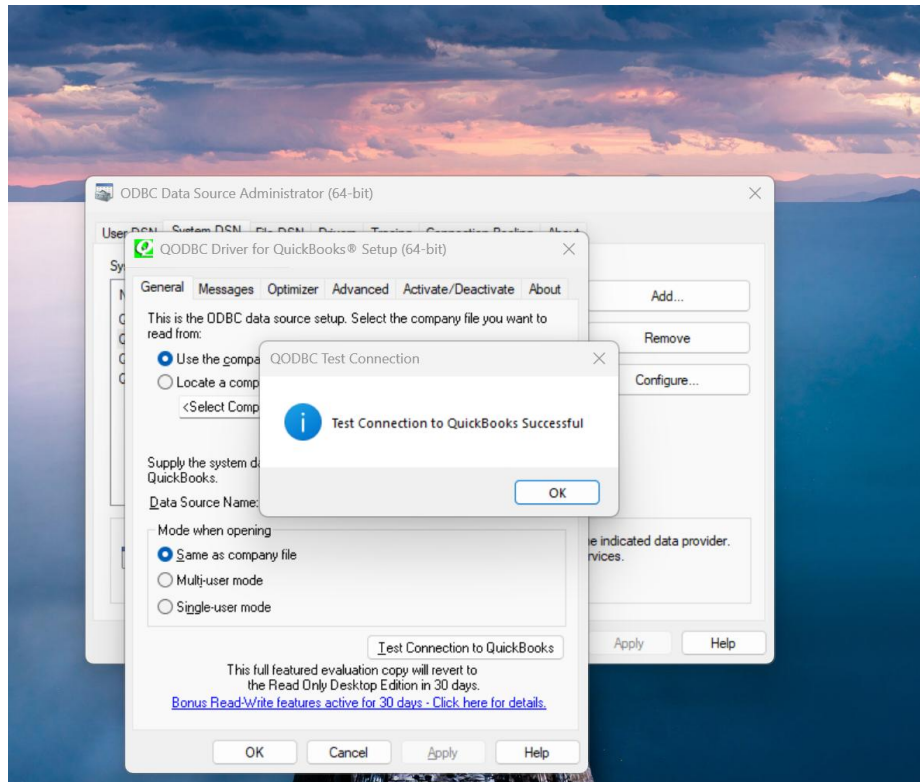
- This will open an Application permission confirmation and select Yes.



- Under the **Sign in as:** section select Admin from the drop-down menu and give Confirm.

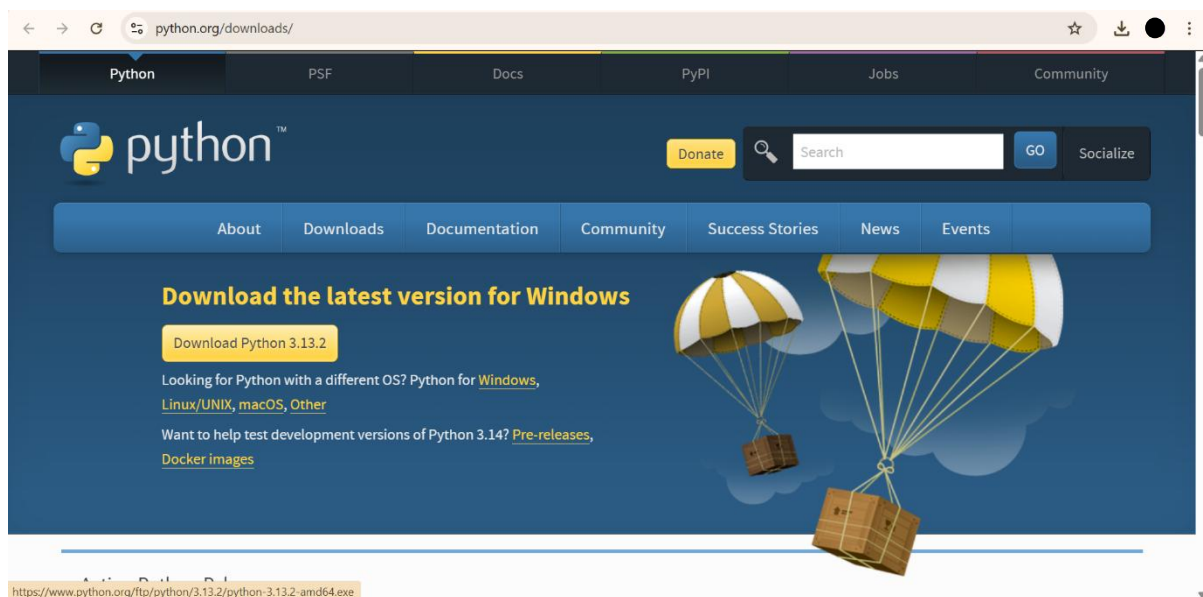


- Wait until you get a pop-up screen “Test Connection to QuickBooks Successful”.



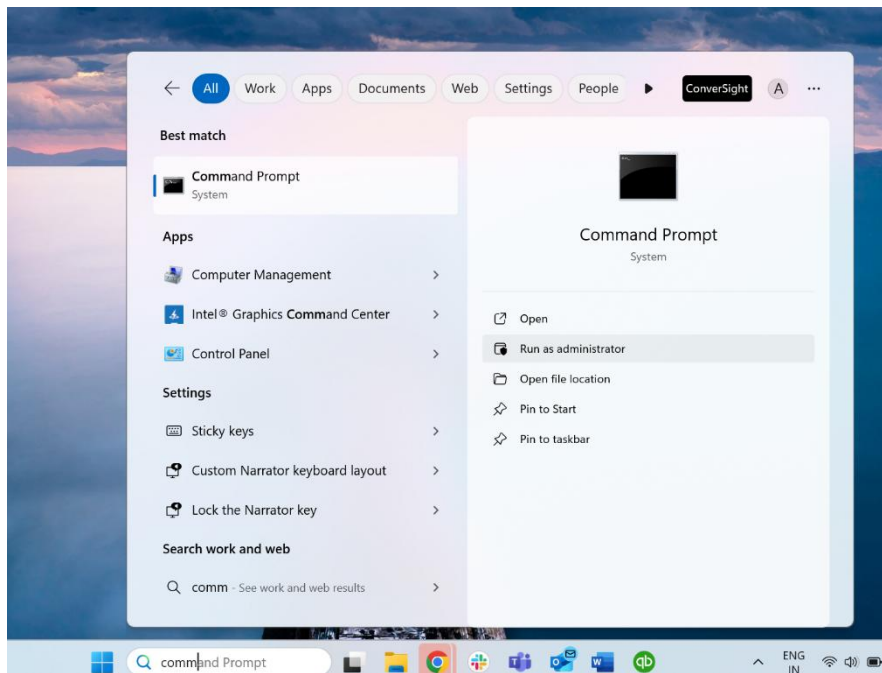
Setup Python for QuickBooks

- Install Python from the given [link](#) and click on **Download Python 3.13.2**



- Once the Python executable file is downloaded, locate the file and double-click to run the installer. In the installation window, check the box that says, **Add Python to PATH**, then click **Install Now**. Follow the on-screen instructions to complete the installation. Once the installation is finished, click **Close**.

- Open Command Prompt from Start and click on **Run as administrator**.



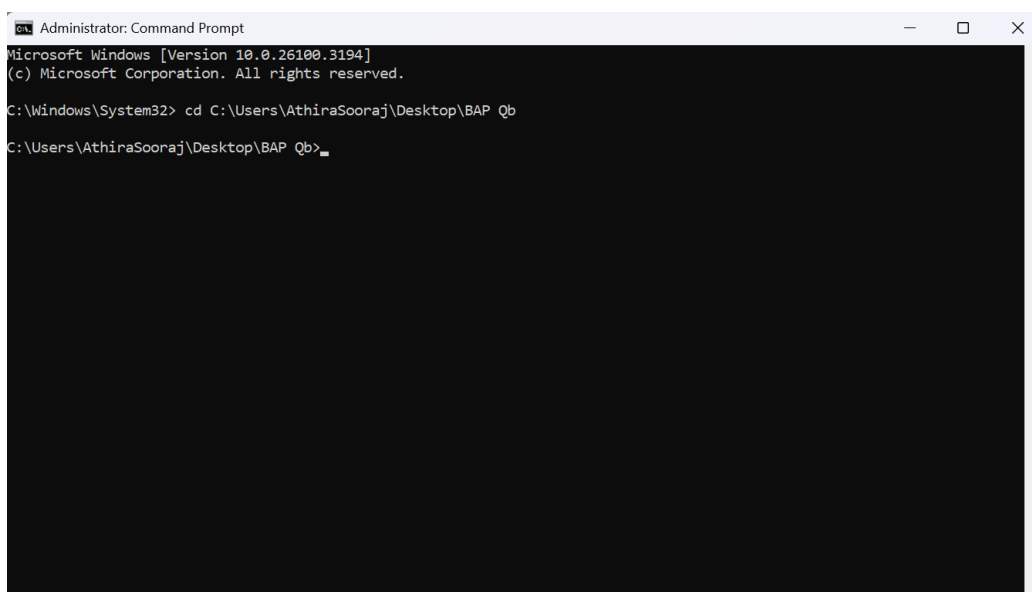
- Copy the path of the “requirements.txt” file and run the following command in the command prompt.

`cd path_to_file`

The path_to_file should be replaced by the path to the text file requirements.txt like

`cd C:\Users\AthiraSooraj\Desktop\BAP Qb`

- Click enter and now the directory would have changed to the given path as shown below



- Once the directory has switched to the given path run the following command
pip install -r requirements.txt

```
Administrator: Command Prompt
Microsoft Windows [Version 10.0.19045.5247]
(c) Microsoft Corporation. All rights reserved.

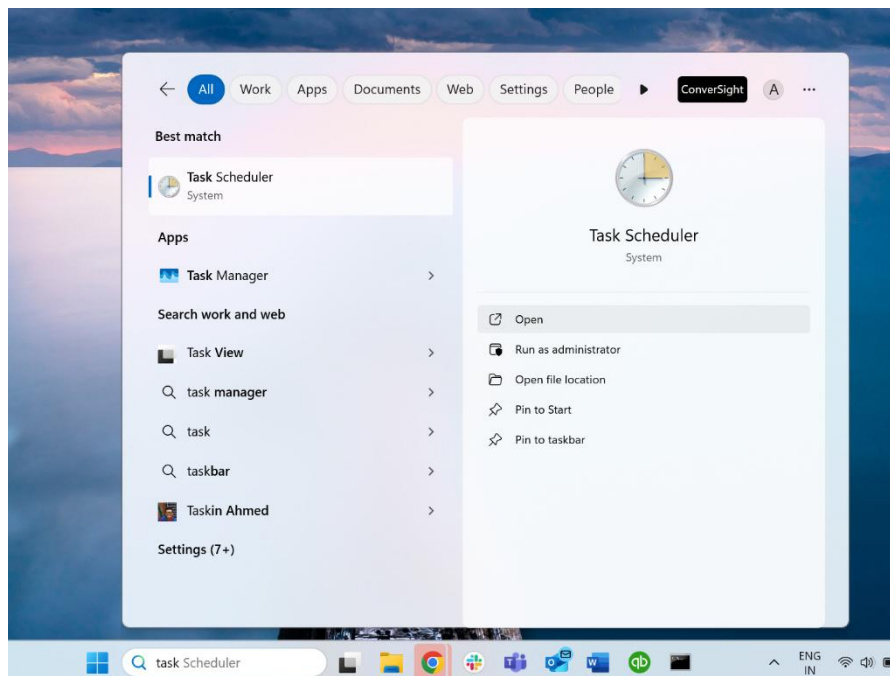
C:\Windows\system32>cd C:\Users\Admin\Desktop\Quickbooks

C:\Users\Admin\Desktop\Quickbooks>pip install -r requirements.txt
Requirement already satisfied: psutil in c:\users\admin\appdata\roaming\python\python311\site-packages (from -r requirements.txt (line 1)) (5.9.8)
Requirement already satisfied: pyodbc in c:\python311\lib\site-packages (from -r requirements.txt (line 2)) (5.2.0)
Requirement already satisfied: requests in c:\python311\lib\site-packages (from -r requirements.txt (line 3)) (2.32.3)
Requirement already satisfied: pyyaml in c:\python311\lib\site-packages (from -r requirements.txt (line 4)) (6.0.2)
Requirement already satisfied: polars in c:\python311\lib\site-packages (from -r requirements.txt (line 5)) (1.13.1)
Requirement already satisfied: charset-normalizer<4,>=2 in c:\python311\lib\site-packages (from requests->-r requirements.txt (line 3)) (3.4.0)
Requirement already satisfied: idna<4,>=2.5 in c:\python311\lib\site-packages (from requests->-r requirements.txt (line 3)) (3.10)
Requirement already satisfied: urllib3<3,>=1.21.1 in c:\python311\lib\site-packages (from requests->-r requirements.txt (line 3)) (2.2.3)
Requirement already satisfied: certifi>=2017.4.17 in c:\python311\lib\site-packages (from requests->-r requirements.txt (line 3)) (2024.8.30)

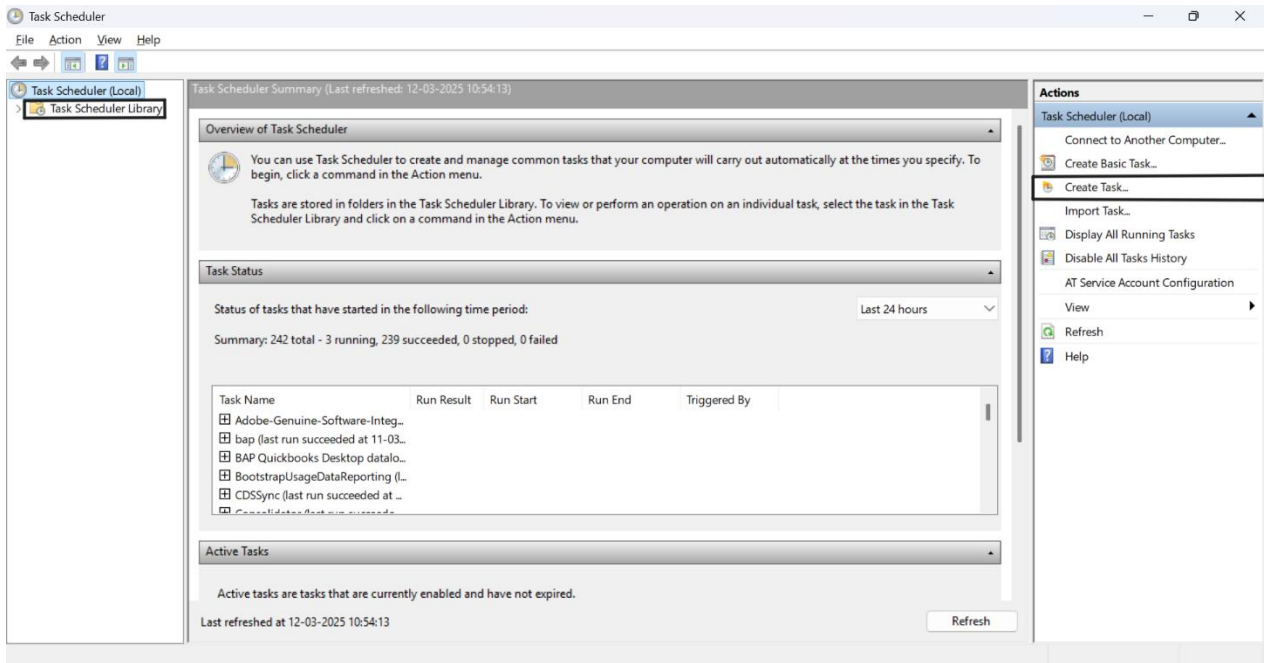
C:\Users\Admin\Desktop\Quickbooks>
```

Setup Windows task Scheduler

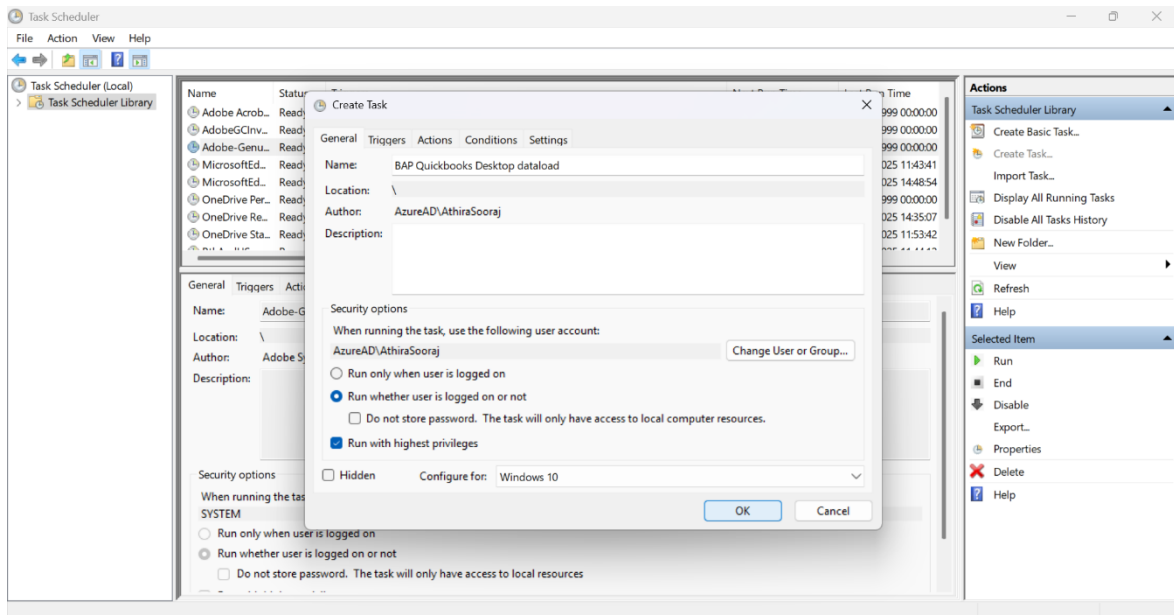
- Open task scheduler from the menu



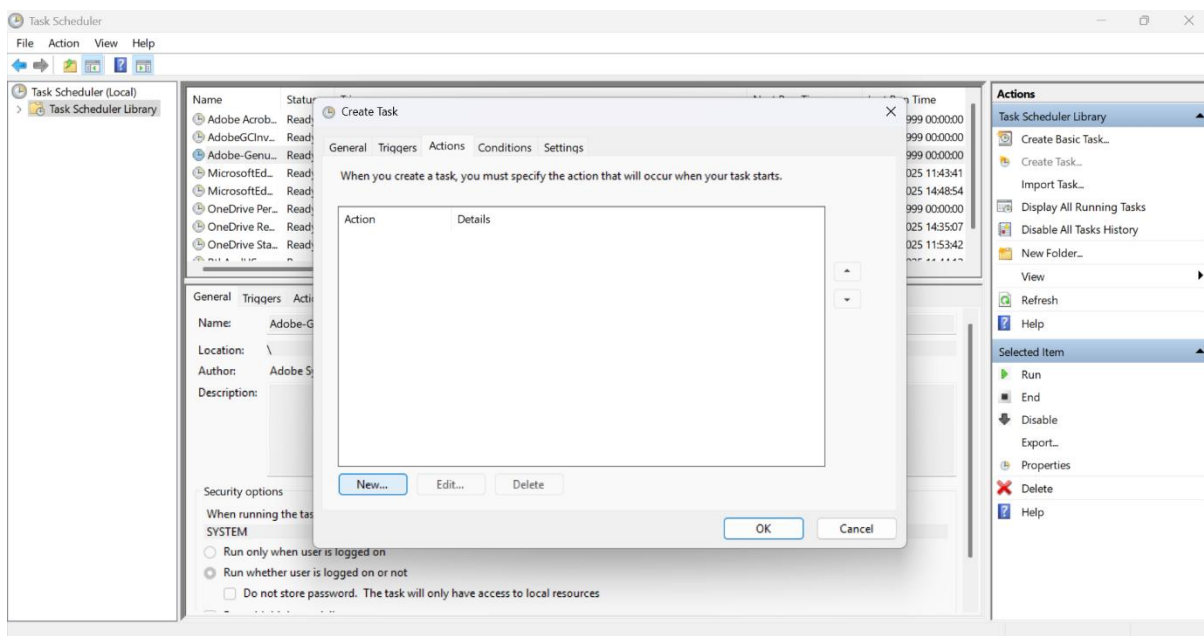
- On the top left corner of the window click on **Task Scheduler Library** and then click on **Create task** from the right side of the window.



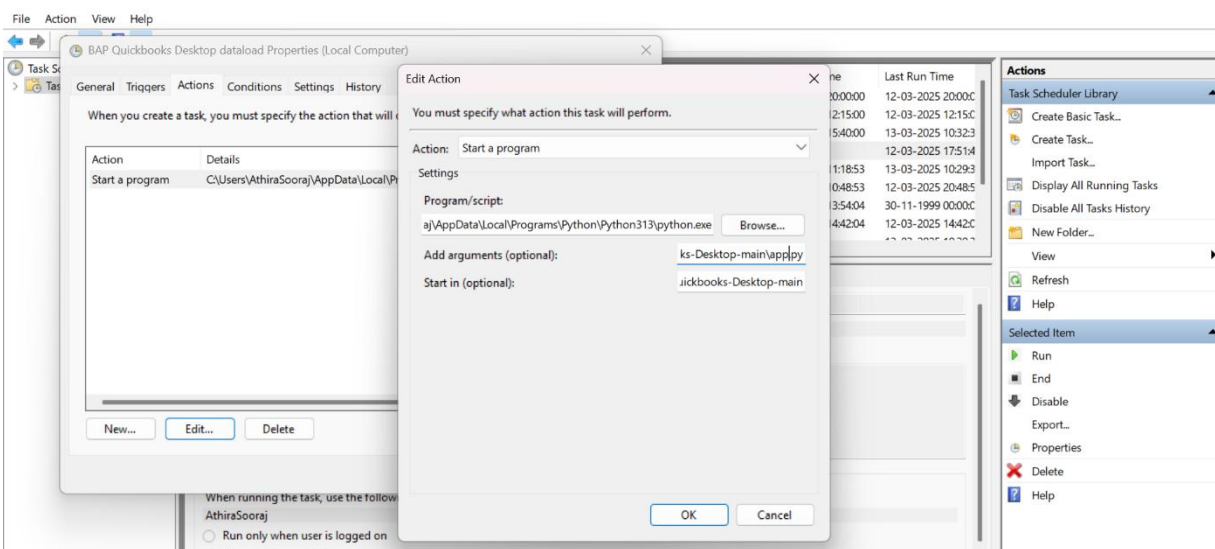
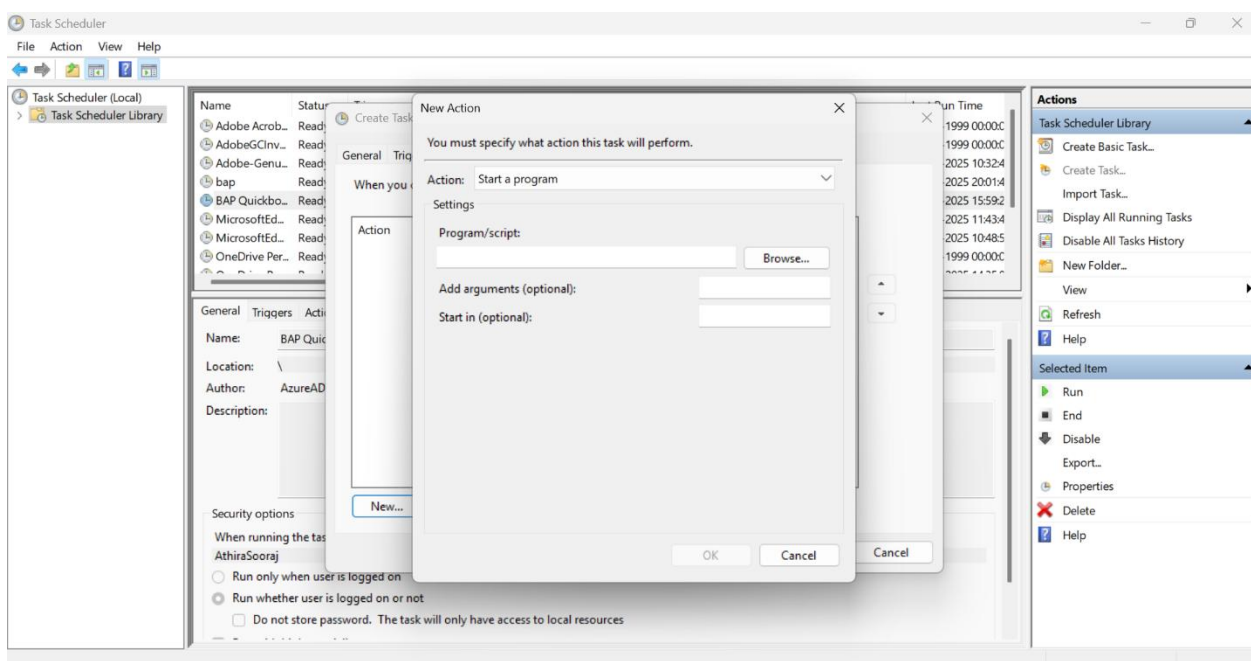
- Under the **General** tab, enter a name for the task and under the Security Options, select **Run whether user is logged on or not** and enable **Run with highest privileges**. Then click ok.



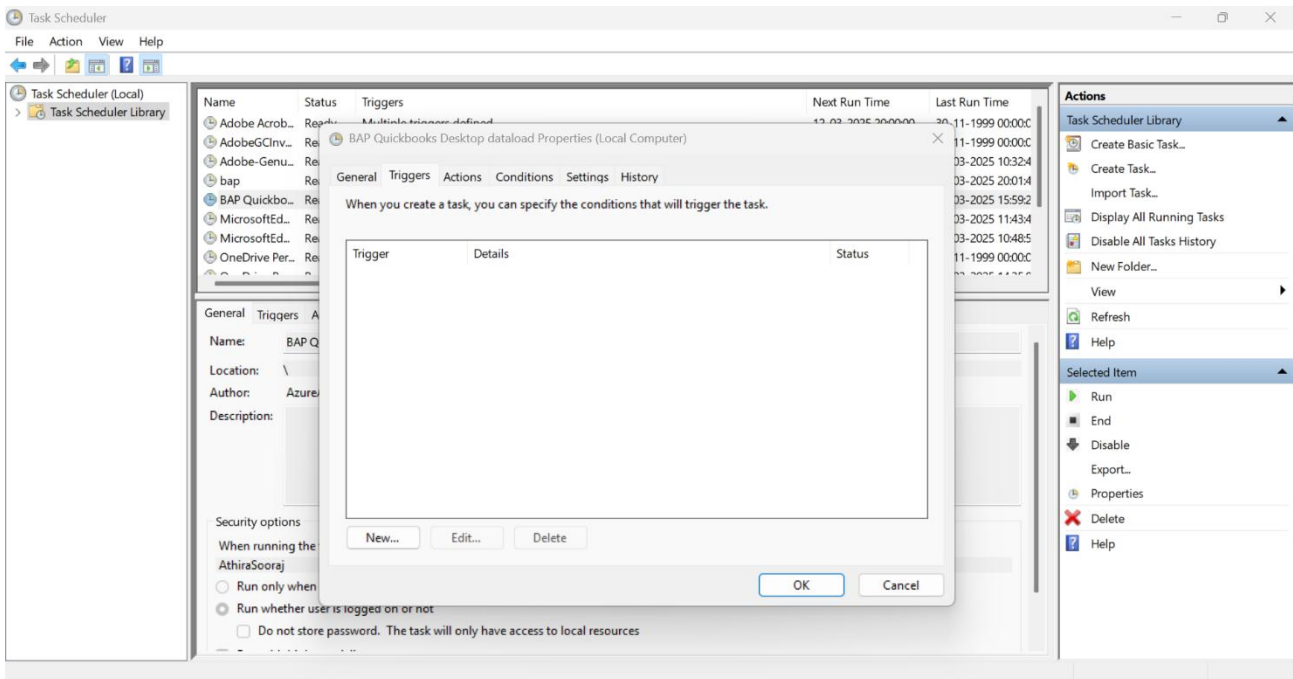
- Go to the **Action** tab and click **New** to create a new task



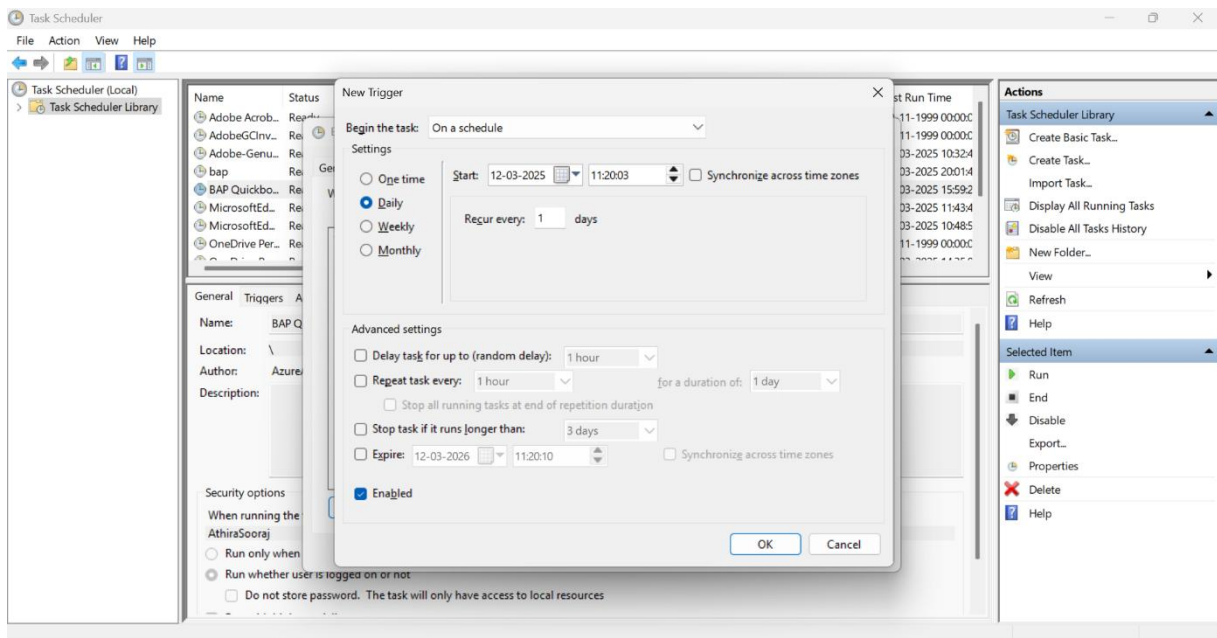
- For **Program/script**: click the **Browse** button, navigate to the folder containing Python.exe, select it, and click **Open**.
For **Add arguments (optional)**: copy the path to the file app.py and paste it here.
For **Start in (optional)**: copy the path to the folder containing the file app.py and paste it here.
Click **OK**.



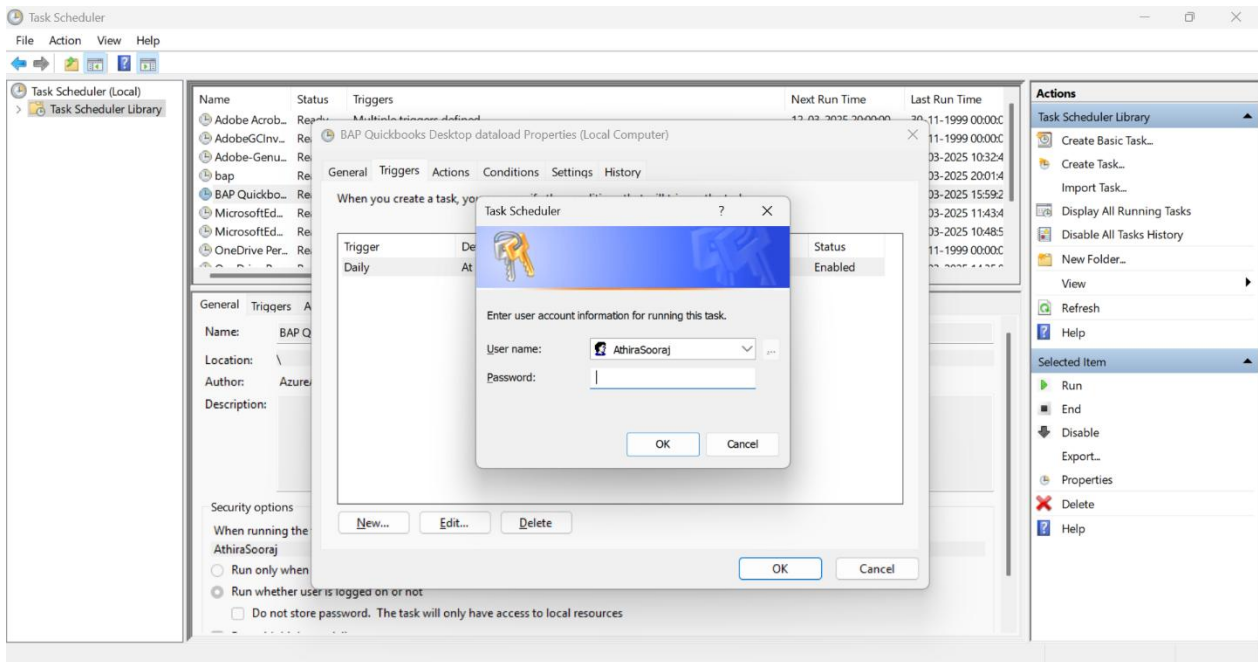
- Go to the **Triggers** tab and click **New** to schedule this task.



- Click on **Daily** or **Weekly** based on the demand and fill the time in which the schedule needs to be run. Then finally click **OK**.



- Again, click **OK** to register the task and schedule it. This is open a pop-up, please provide your Microsoft account password and then click **OK**.



- Verify that the task is listed in **Task Scheduler Library**. The task is now set up successfully, and the data load will run on QuickBooks as scheduled.

Note: Make sure the QuickBooks desktop application is running in the background during the schedule. And no pop-up or dialog box appears in QuickBooks to avoid connectivity issues.