# 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.
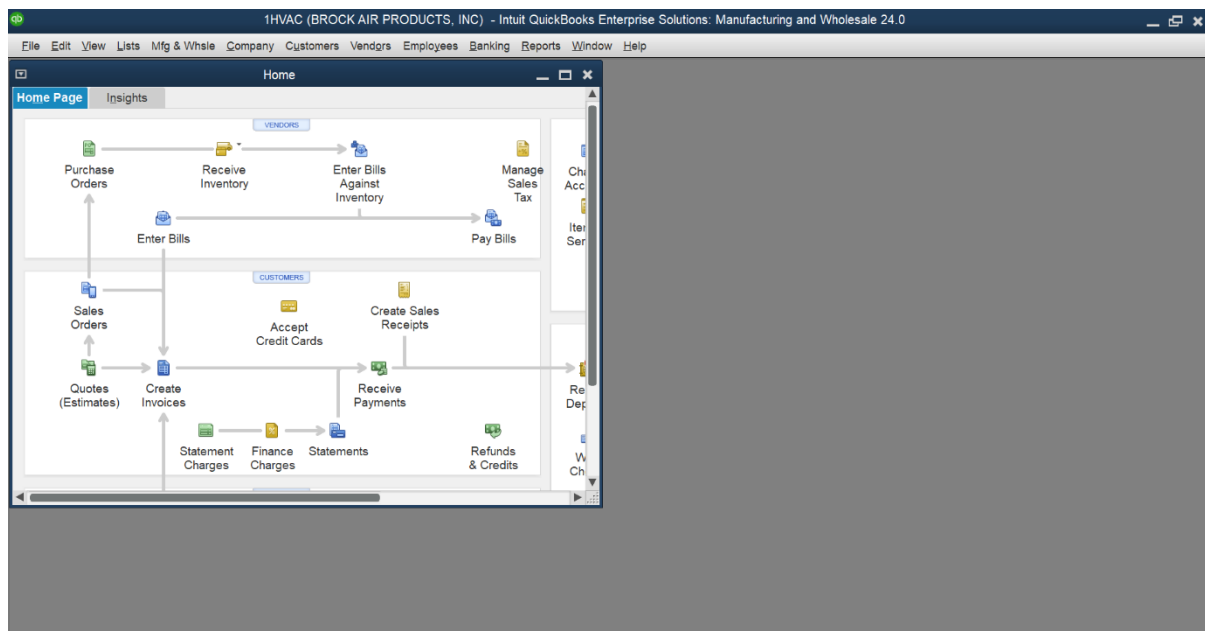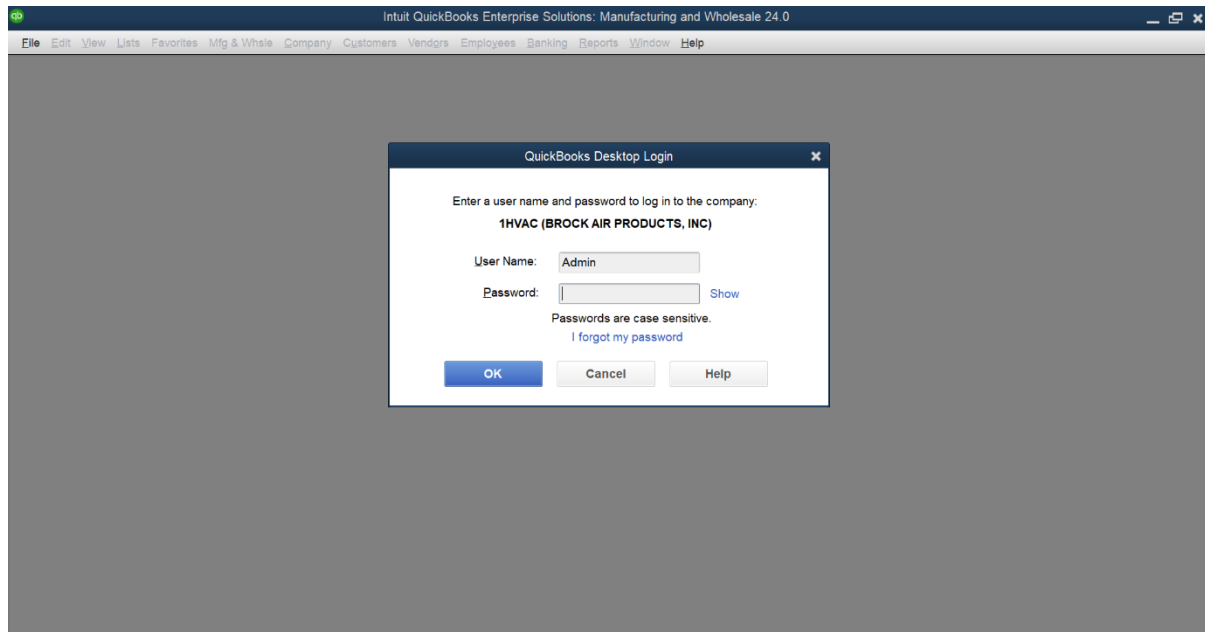
Installing QODBC

- Download the QODBC Driver for QuickBooks [here](#), navigating to the "Downloads" section, and selecting **QODBC Driver for QuickBooks**, as shown in the screenshot below.
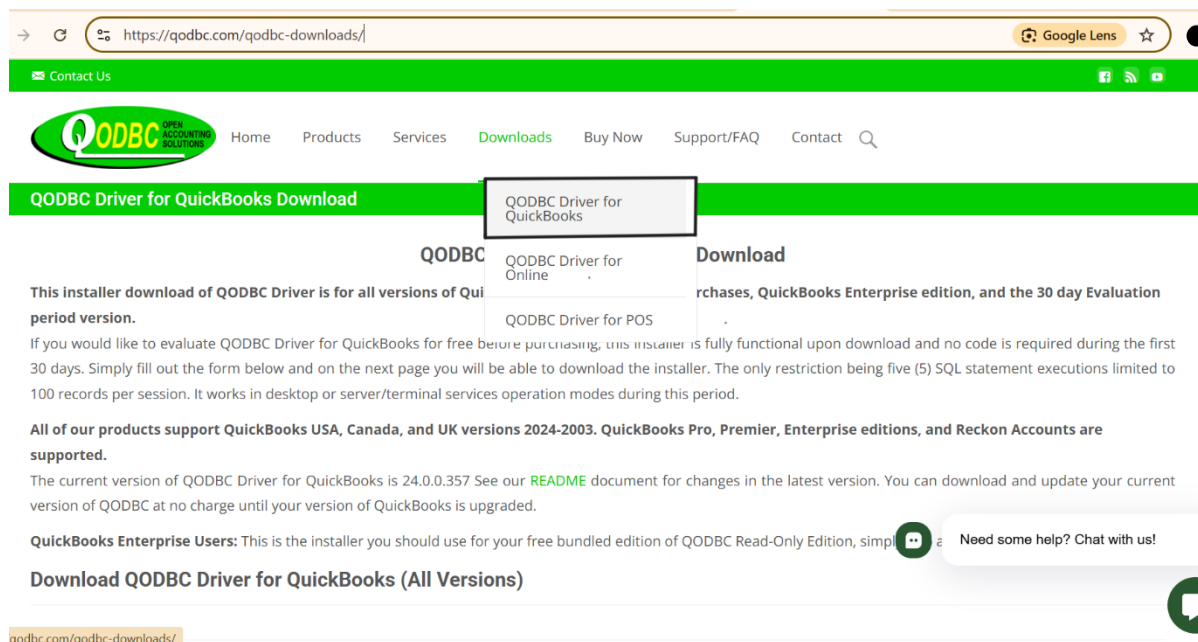
- Scroll down until you see a section like this, then fill out the necessary details and click **Download QODBC** to proceed with the download.

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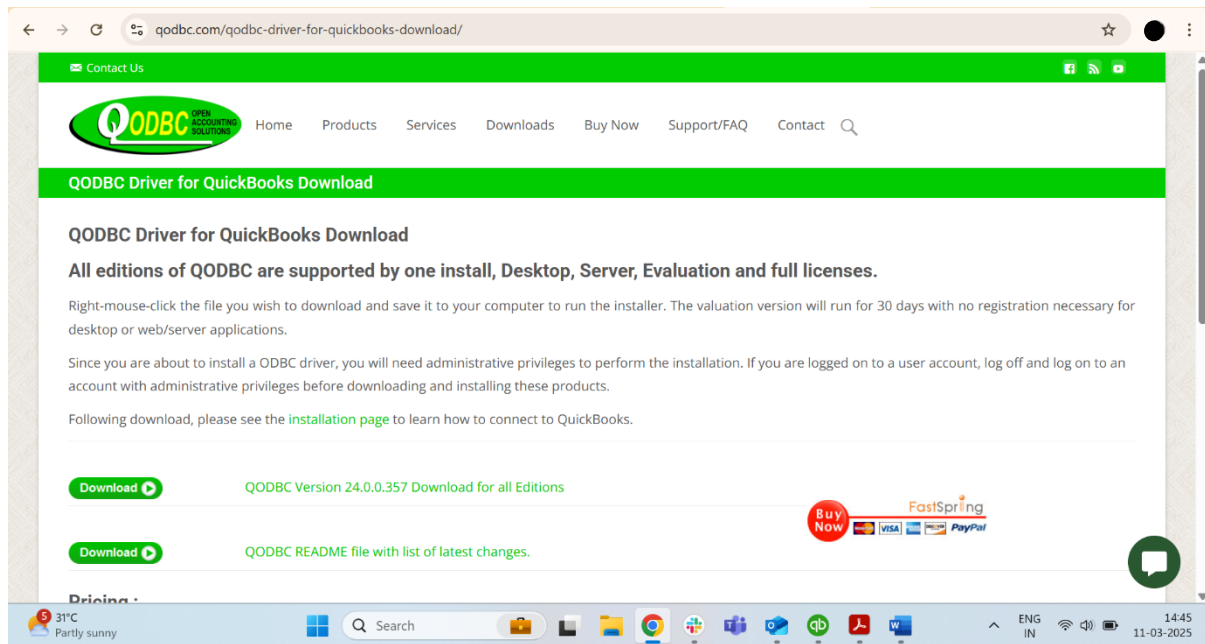

- Once the QODBC Driver for QuickBooks is downloaded, locate the installer file and double-click to run it. Follow the on-screen instructions to complete the installation process, including agreeing to the terms and selecting the installation location.
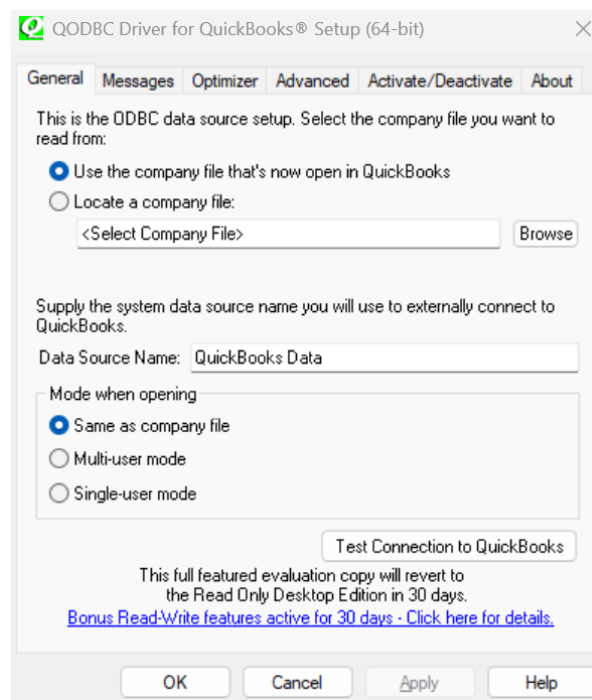
Setup QODBC for QuickBooks

- Open **ODBC Data Sources (64-bit)** from Start
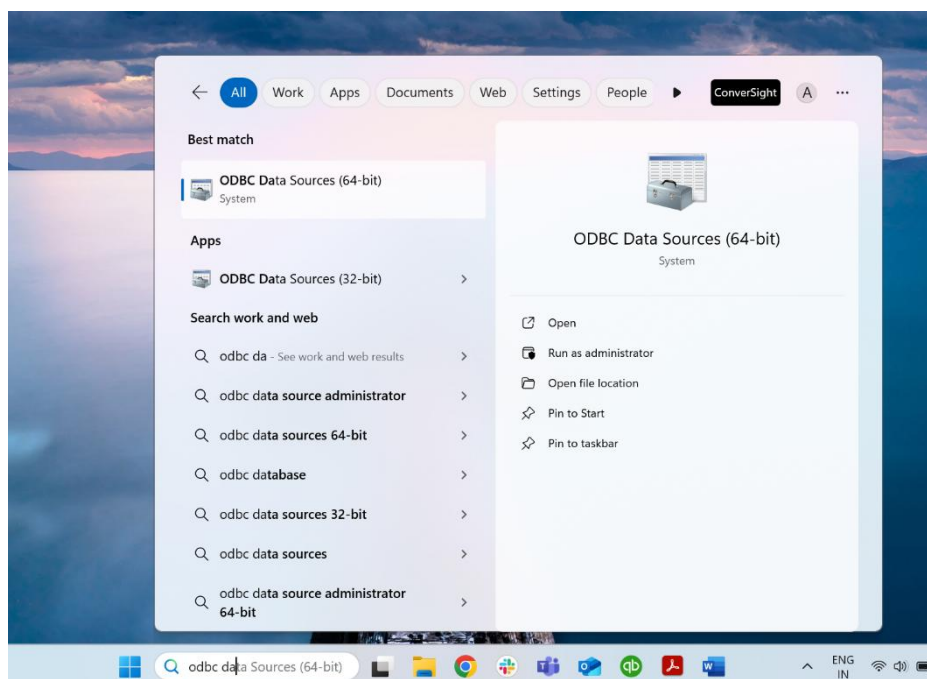
- Under System DSN select **QuickBooks Data 64-bit** and then select **Configure.**
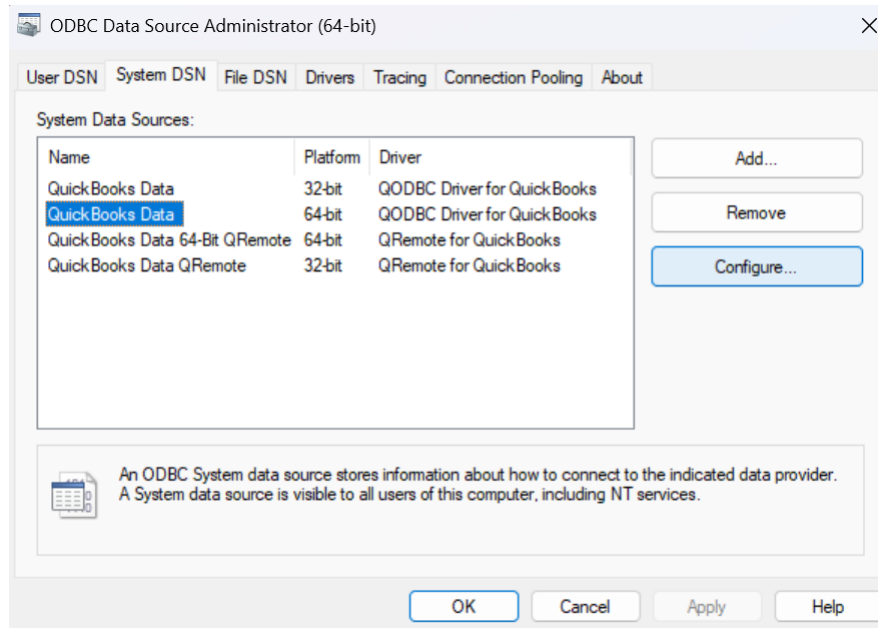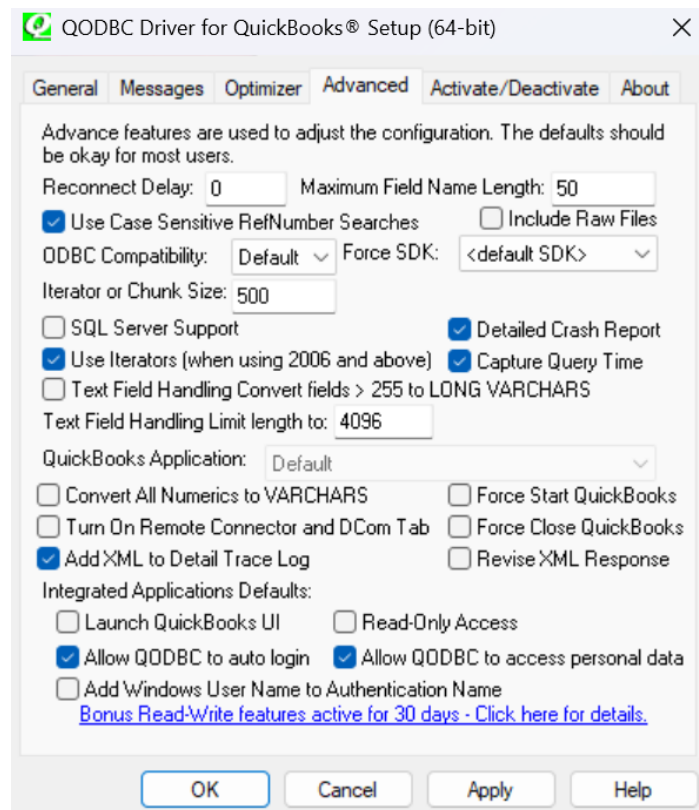

- This will open a **QODBC Driver for QuickBooks Setup screen.**

- 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".
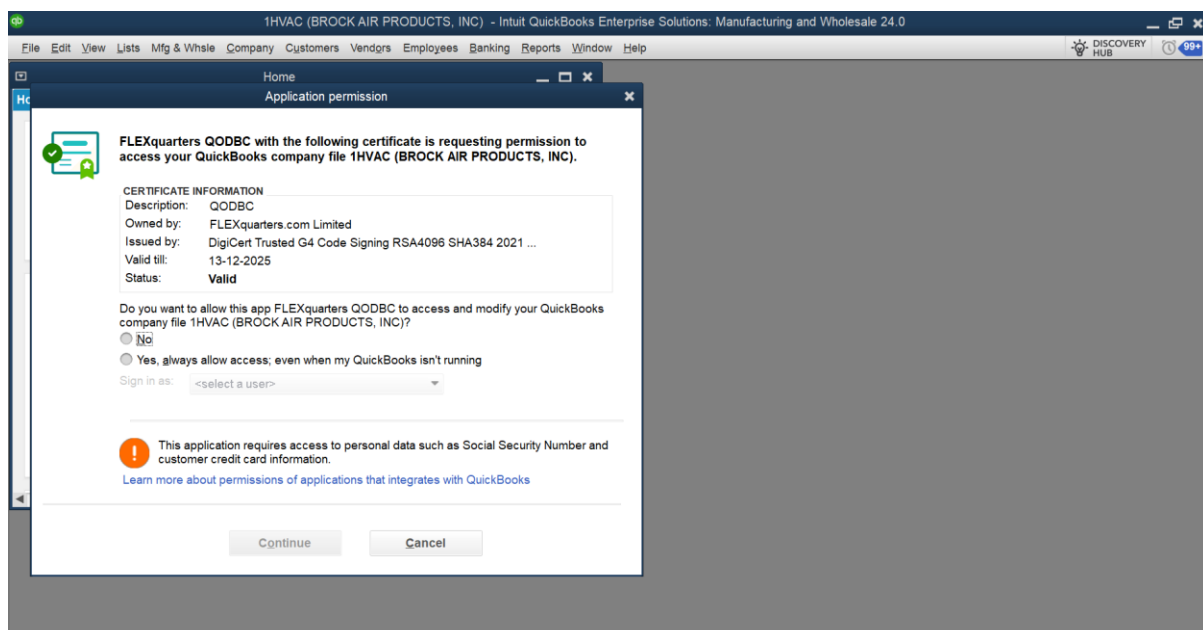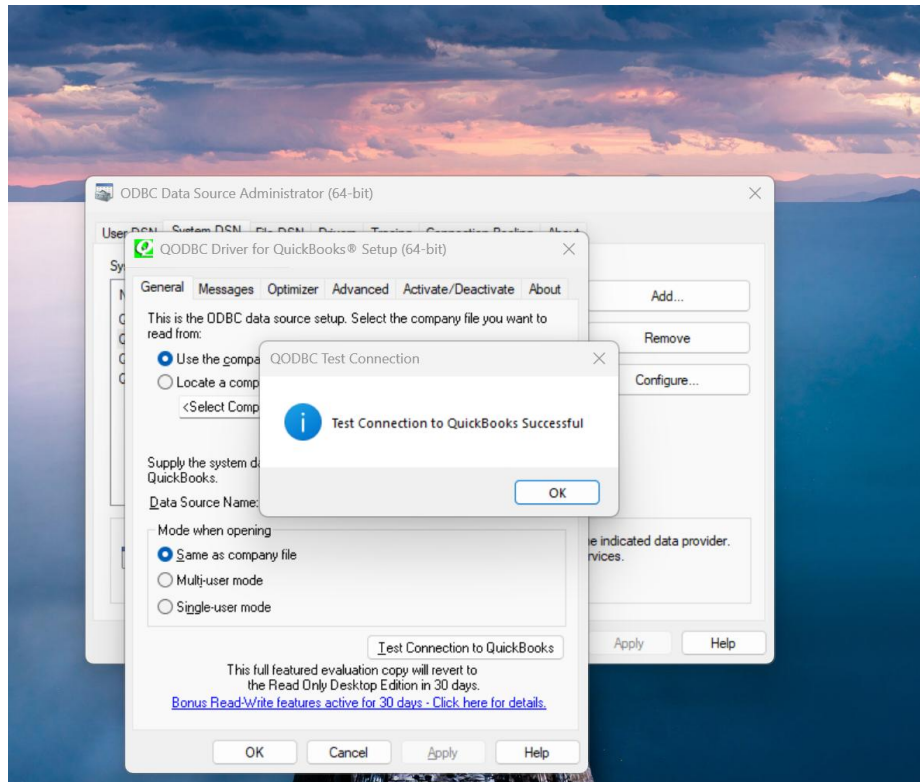
- This will open an Application permission confirmation and select Yes.
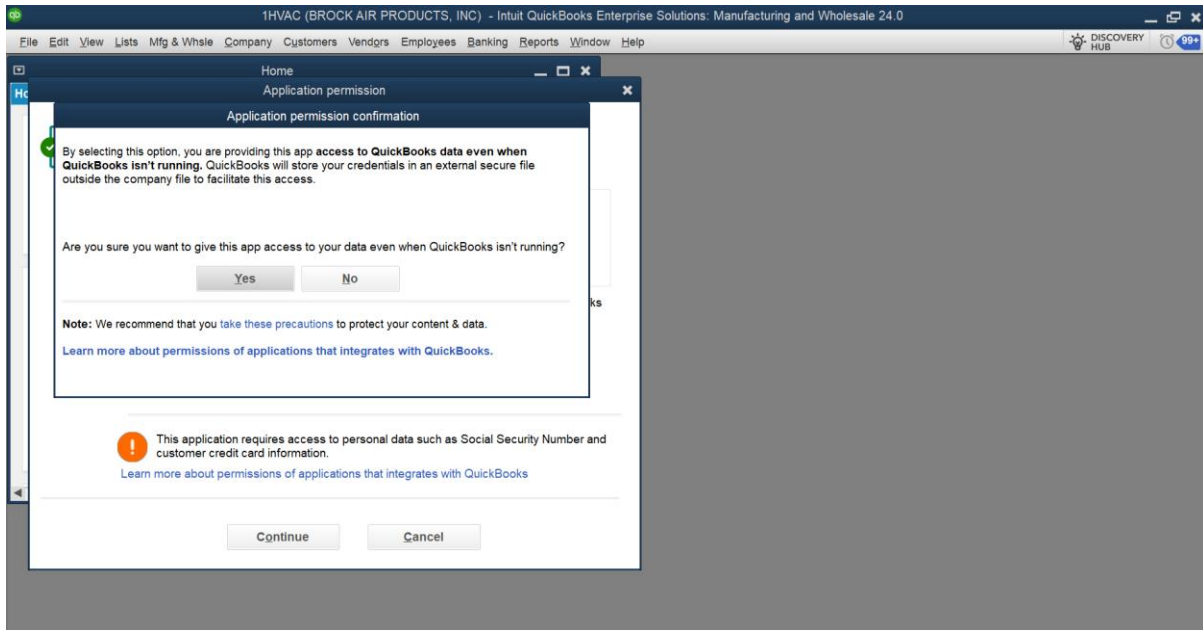
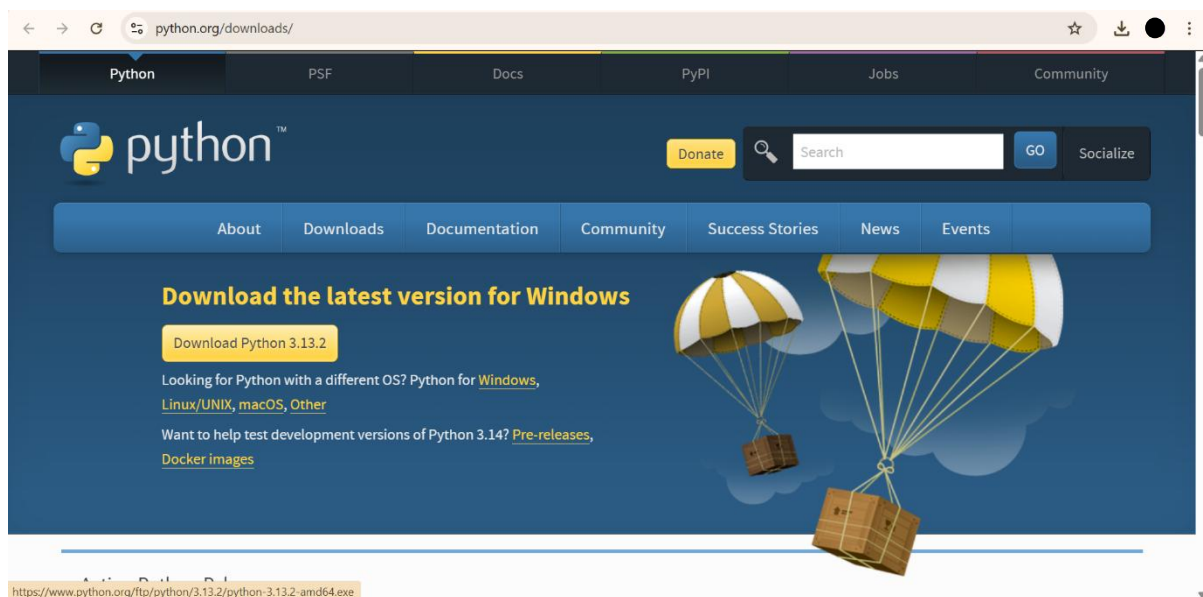- Under the **Sign in as:** section select Admin form the drop-down menu and give Confirm.
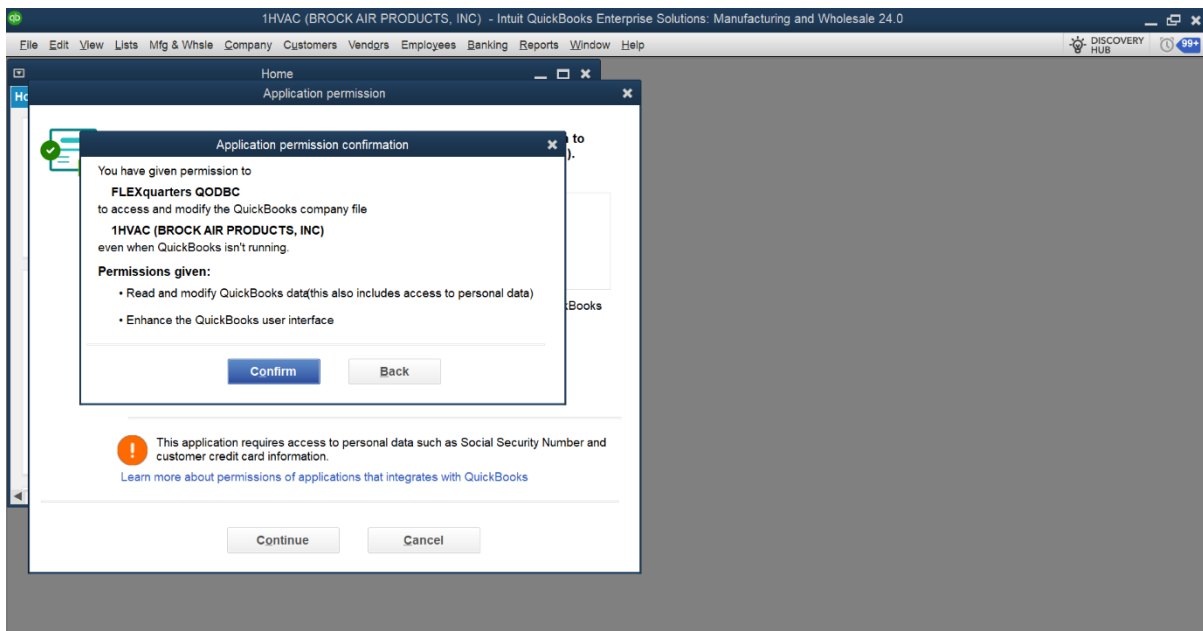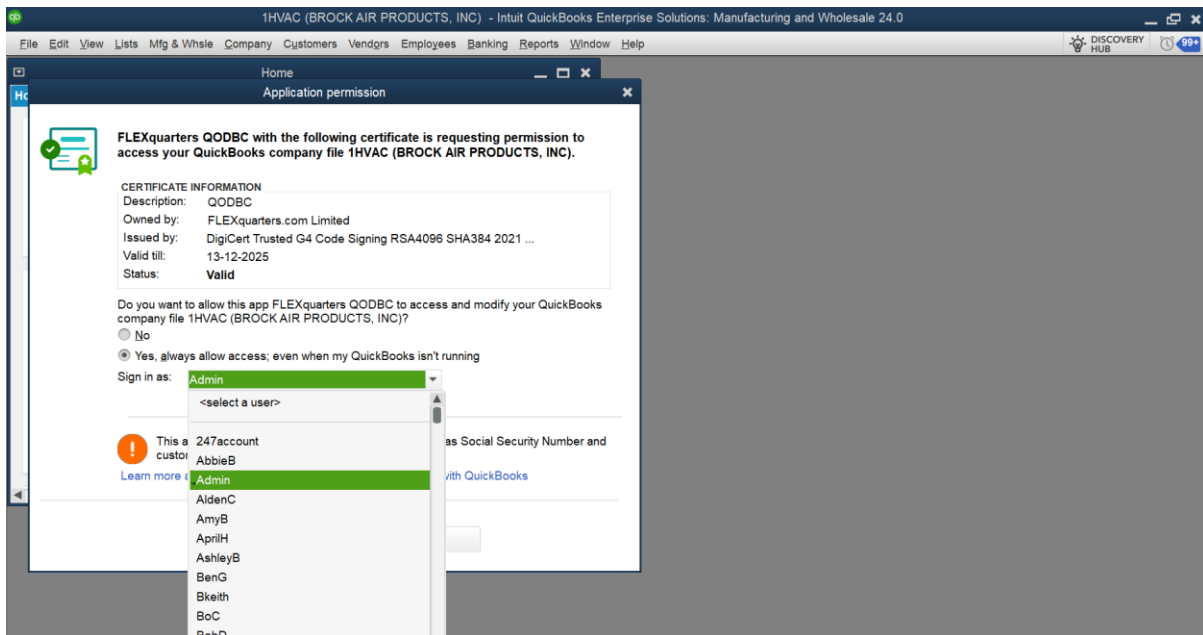
- Wait until you get a pop-up screen "Test Connection to QuickBooks Successful".


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**.

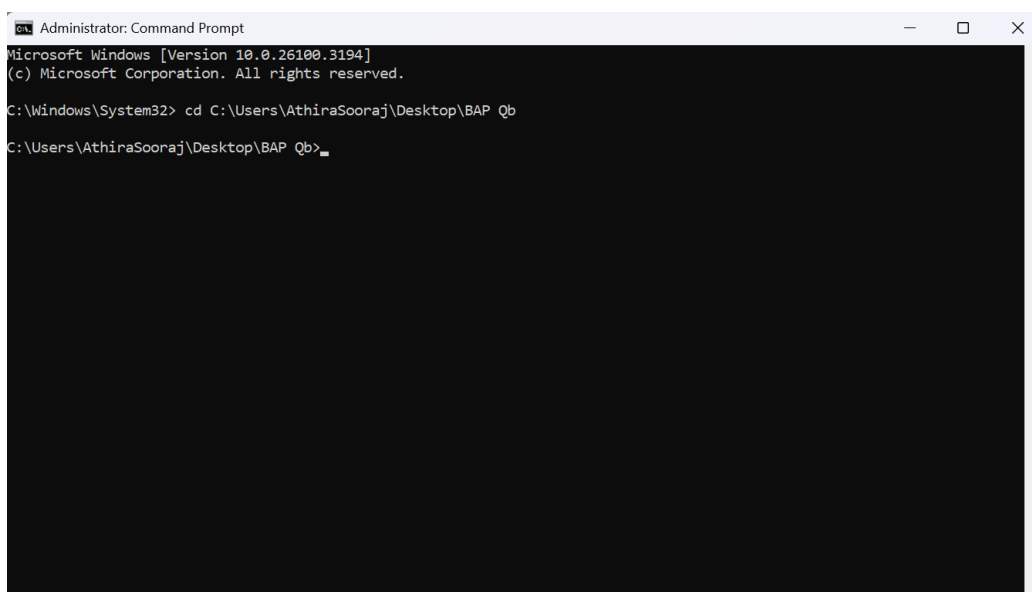- Open Command Prompt from Start and click on **Run as administrator.**
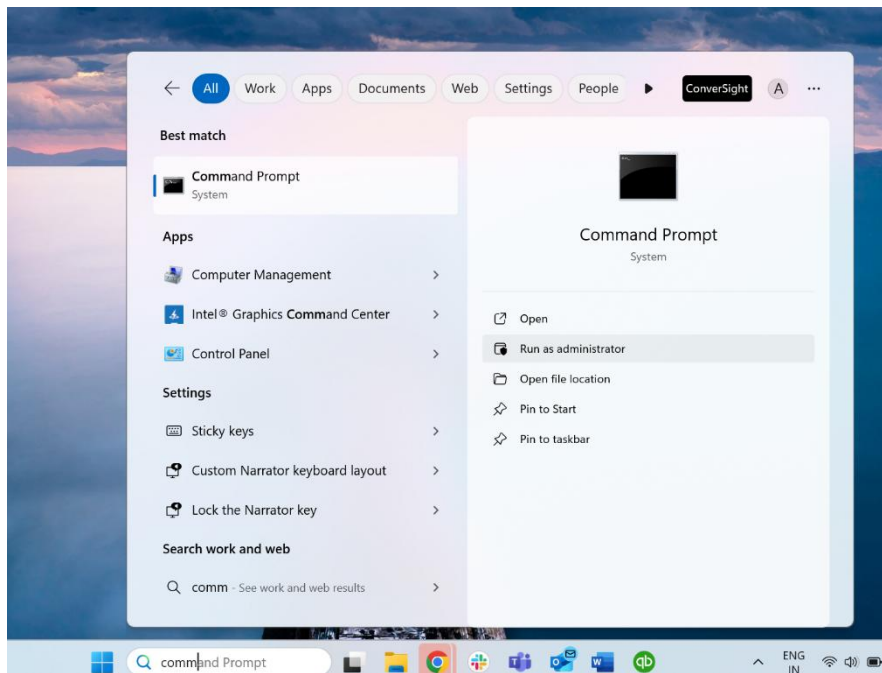
- Copy the path of the "requirements.txt" file and run the following command in the command prompt.
  cd path_to_file
  The path_to_file should be replaced by the path to the text file requirements.txt like
  cd C:\Users\AthiraSooraj\Desktop\BAP Qb

- 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
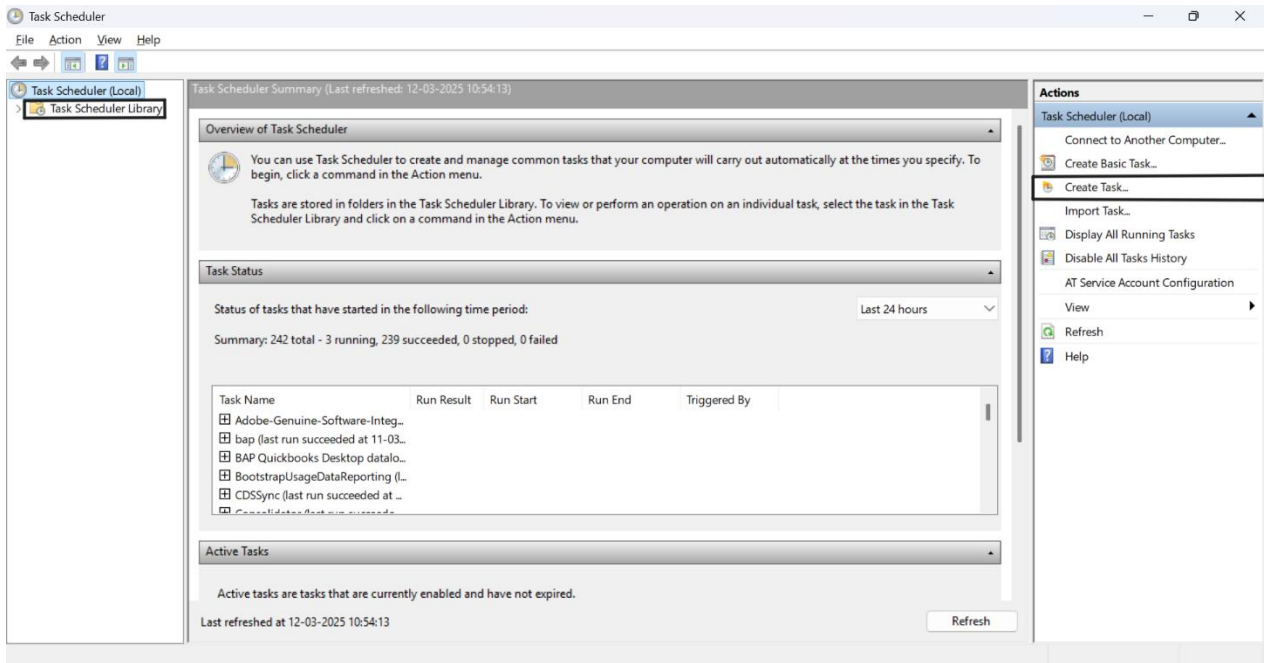

## Setup Windows task Scheduler

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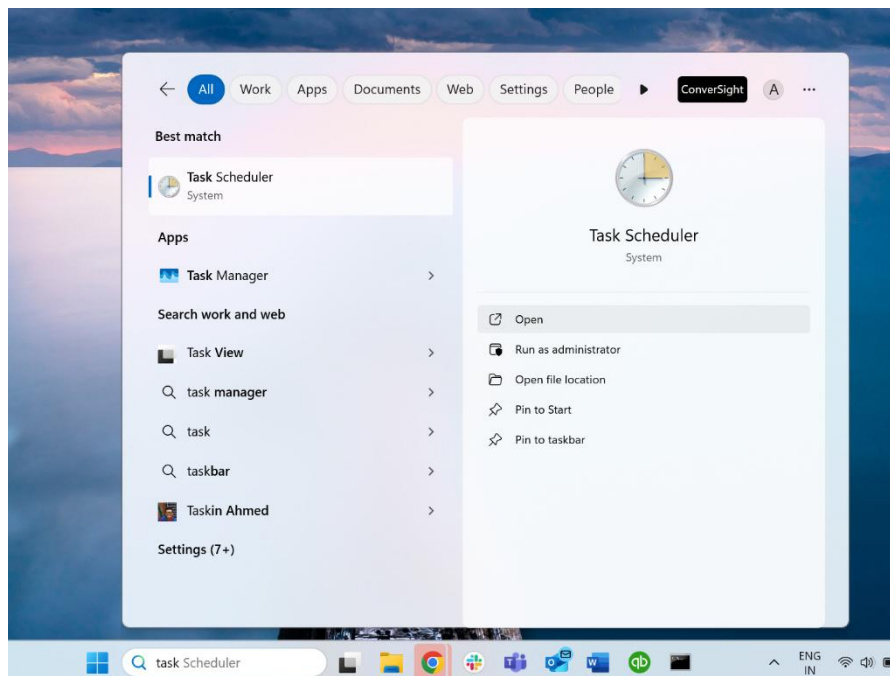
- On the top left corner of the window click on **Task Scheduler Library** and then click on **Create task** from the right side of the window.


- 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.
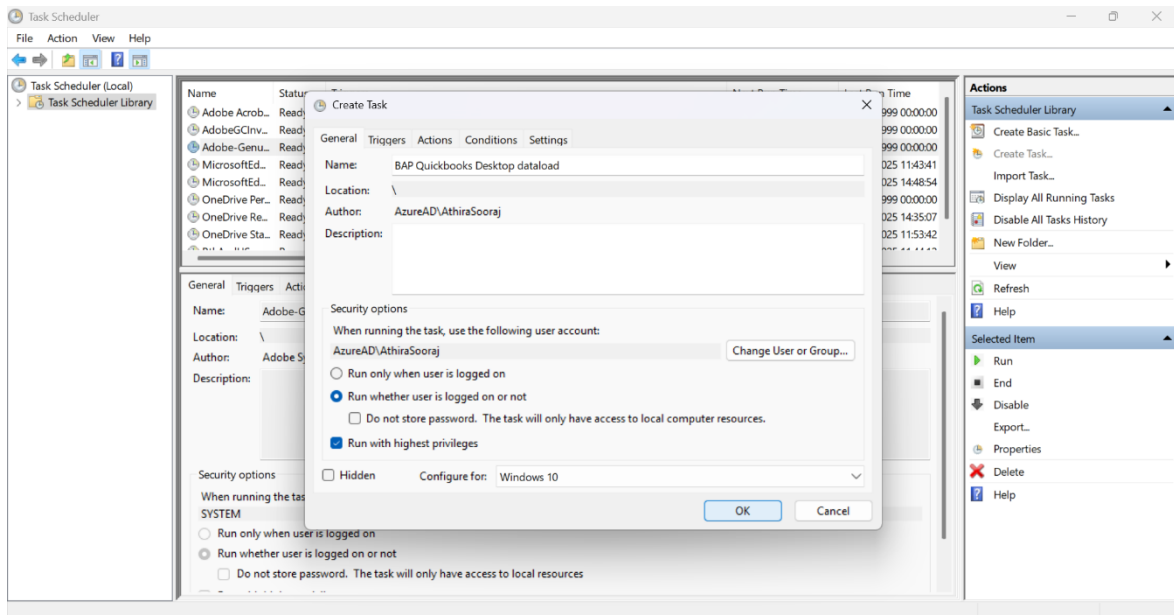
- Go to the **Action** tab and click **New** to create a new task
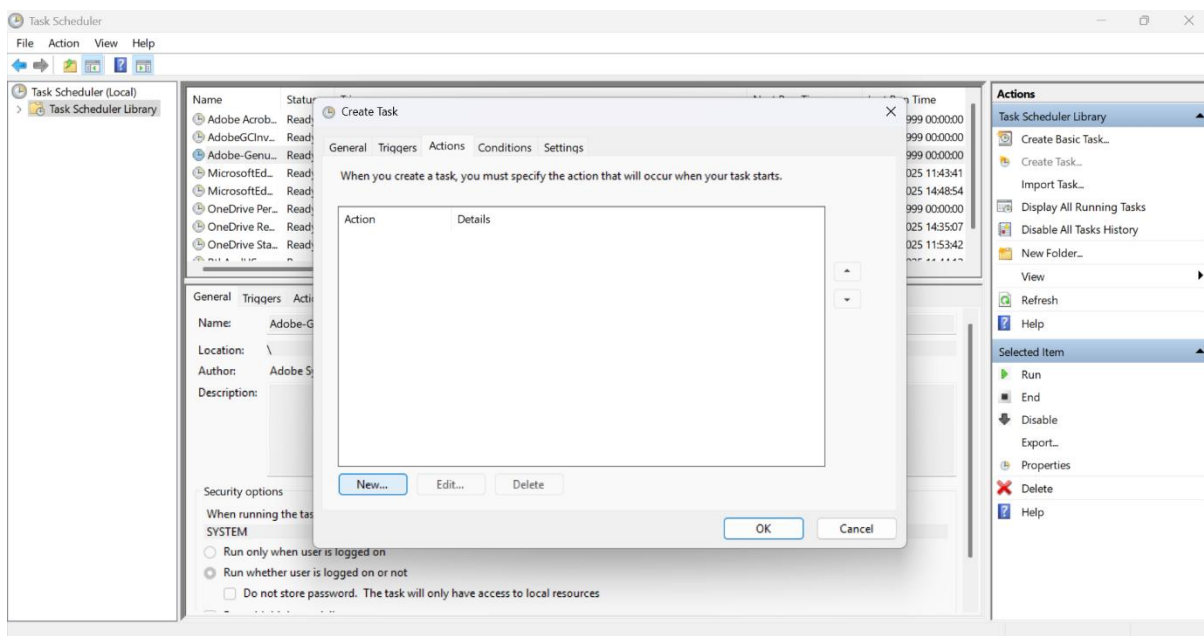
- For **Program/script:** click the **Browse** button, navigate to the folder containing Python.exe, select it, and click **Open.**
  For **Add arguments (optional):** copy the path to the file app.py and paste it here**.**
  For **Start in (optional):** copy the path to the folder containing the file app.py and paste it here**.**
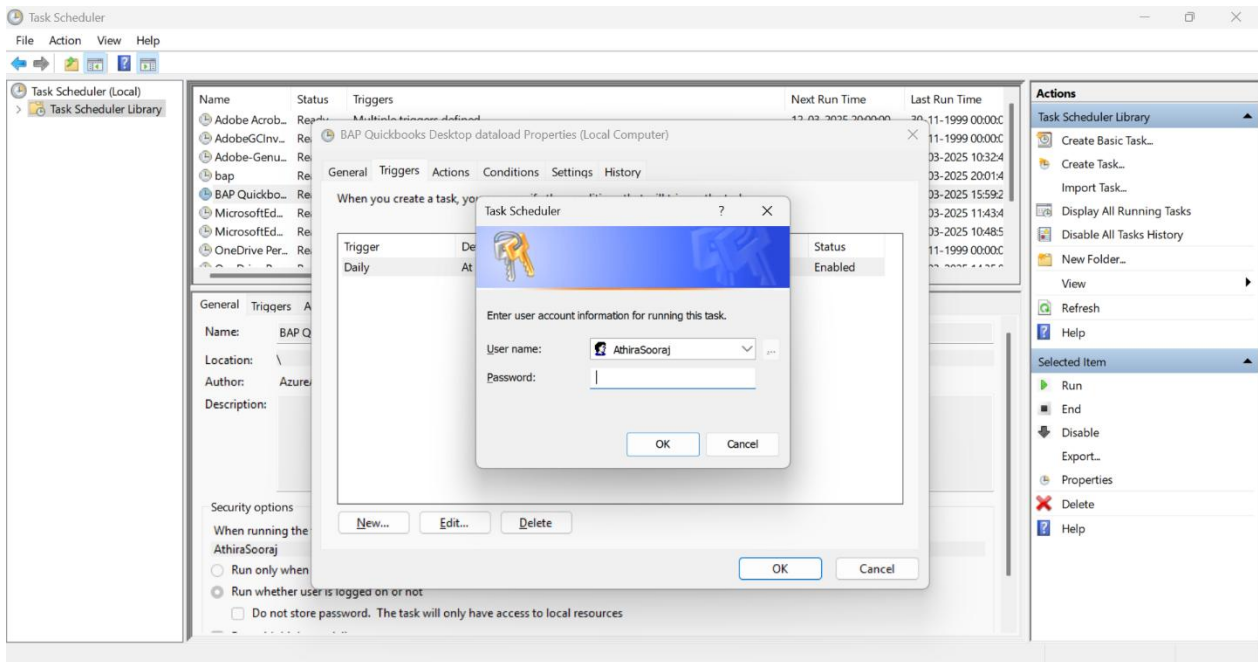 Click **OK.**
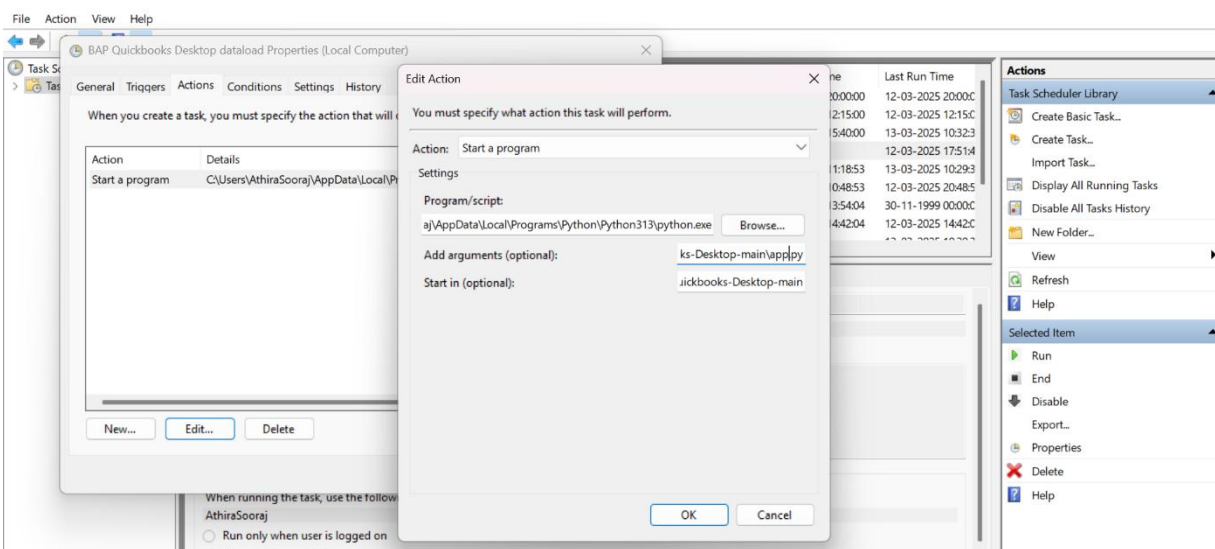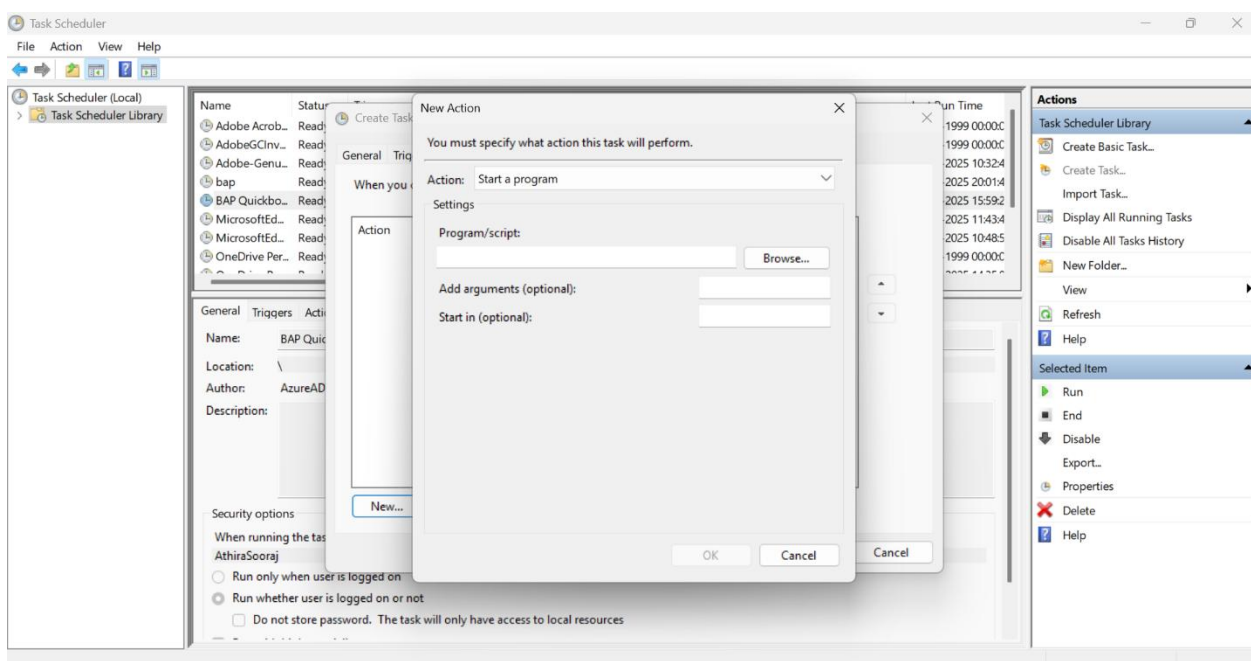
- Go to the **Triggers** tab and click **New** to schedule this task.
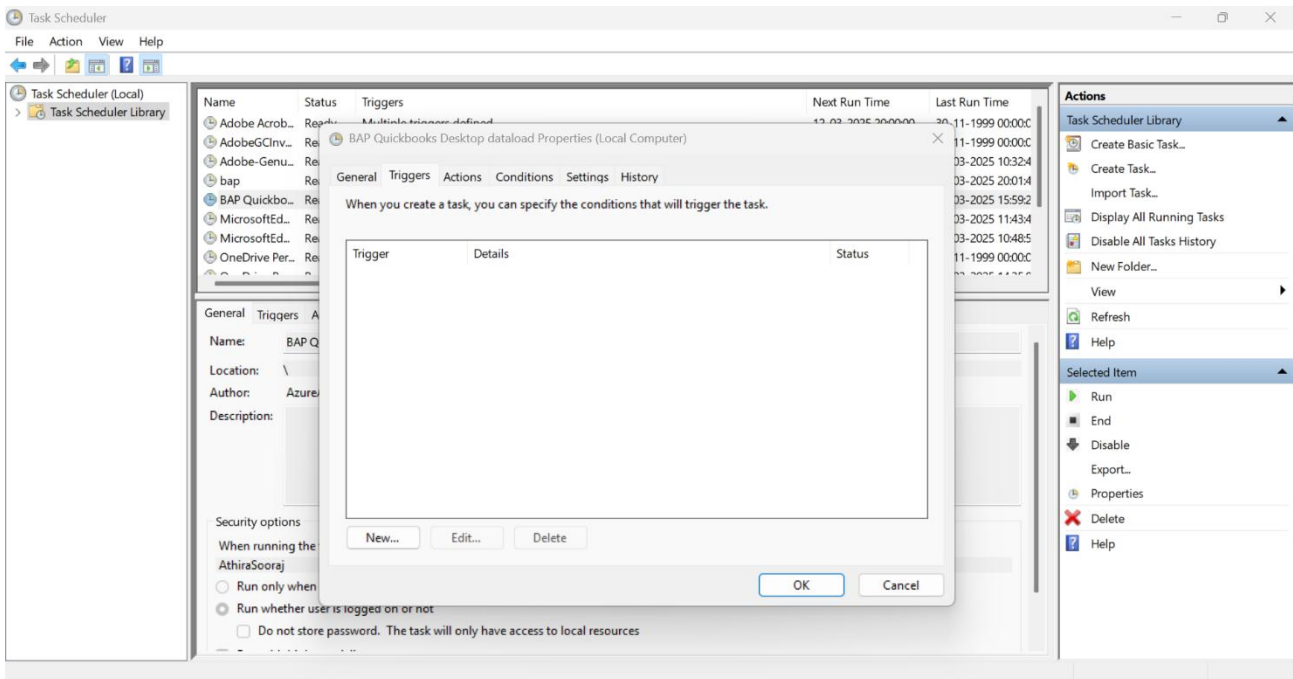
- Click on **Daily** or **Weekly** based on the demand and fill the time in which the schedule needs to be run. Then finally click **OK**.
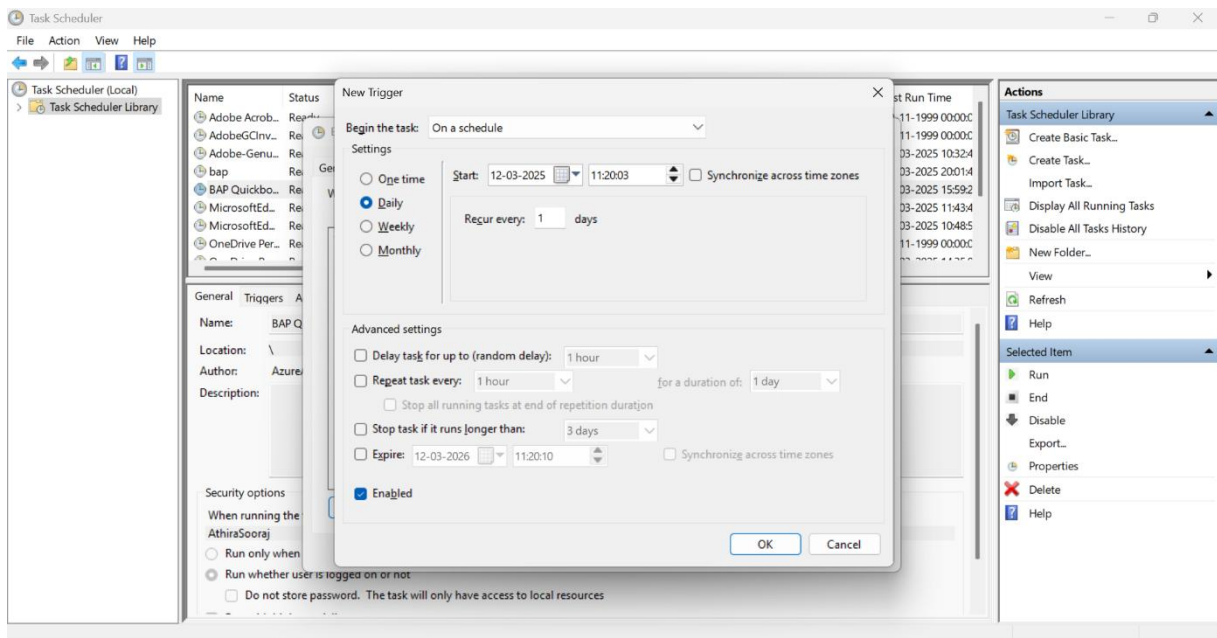
- Again, click **OK** to register the task and schedule it. This is open a pop-up, please provide your Microsoft account password and then click **OK.**

- 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 in running in the background during the schedule. And no pop-up or dialog box appears in QuickBooks to avoid connectivity issues.