# QuickBooks WebConnector Setup

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Exciting news! Our ConnectBooster Support documentation is moving to a new location. Be sure to bookmark the new link below.

https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm

### Launching the synchronization with QuickBooks

Log into QuickBooks as the main "Admin" user account. Set the company file to SINGLE user mode.



Launch the Web Connector program. This is normally located under Start -> All Programs -> QuickBooks Folder -> Web Connector.

 On Windows, you can use the windows key, type "web con" in the search. (You may want to create a shortcut to the Web Connector on the desktop for easier access, or add the .exe to the "startup" folder on the machine.). This program should already be on your machine, as it comes with all default installations & versions of QuickBooks Desktop.



## Adding a Configuration File

Go to your own ConnectBooster portal (companyname.connectboosterportal.com), and login with any admin account to download a configuration file.





Once the file is downloaded, click "Add an application" in the bottom right hand corner of the WebConnector and find/open the recently downloaded config file.



After adding the file to the application, QuickBooks should pop-up with an initial permission box, select OK.

2	A web-based application is requesting access to QuickBooks data through the QuickBooks Web Connector.
	Application Information Name: ConnectBooster QuickBooksWC Service Host: kme.connectboosteronline.com Description: ConnectBooster synchronization for QuickBooks
	Support URL: https://kme.connectboosteronline.com
0	Web Security Certificate Information Name: *.connectboosteronline.com Expires: 6/26/2017 8:32:05 AM Issuer: Go Daddy Secure Certificate Authority - G2
	QuickBooks Solutions Marketplace Search for information about this application on the
Access to	QuickBooks Solutions Marketplace
Be sure that trust the pro file on behal Set permiss beyond the p	you intended to grant this web application access to QuickBooks and that yo vider. When the Web Connector first accesses your QuickBooks Company fo this application you will be prompted for permission again by QuickBook ons carefully. Intuit cannot control the data exchanged with QuickBooks permissions granted in that dialog.
Make sure	QuickBooks is running and has the correct company file open, then
Click OK to	grant this web service access to QuickBooks, otherwise click Cancel

On the next pop-up (may be hidden by other QuickBooks windows or not show at all) select:

- "Yes, always allow access even if QuickBooks is not running."
- "Login as: " the dedicated Web Connector user.
  - The user should be named along the lines of "ConnectBooster, CBSync, or WebSync". Click Continue,

#### and address the next and last prompt message by clicking "Done"

0		QuickBooks Web Connector 2.1.0.30						
File	Help							
S	elect <u>All</u> Select <u>N</u> one <u>Update Selected</u>	Troubleshoot Help						
	Application	Auto-Run	Every _ Min	Status	Password	Remove		
J	ConnectBooster QuickBooksWC5 ConnectBooster Demo For support: https://demo.connectboosteronline.com	◄	60 <b>•</b>	Last run: 12/2/2014 9:40:23 AM Last result: OK Next run: 12/2/2014 10:40:23 AM <u>Click for more information</u>	*****	Remove		
						V		
And	lication Progress		1008					
Тен			1008					
101	airiogiess		100%					
12/2/2014 9:40:53 AM - Application 'ConnectBooster QuickBooksWC5' has just exchanged data with QuickBooks successfully. Next update at 12/2/2014 10:40:53 AM						Add an application		
					Hide	Exit		

#### Note the right column "Password" field

- Type in anything so it is not blank (ex. Pswrd123)
- Click away or push the TAB key to save.
- You will not need to remember this "Password".

#### Setup is complete!!

To run a sync: Check-mark the selection box on the left and click "Update Selected"

- Clicking the "Update Selected" button will initiate syncing invoice & payment data, and may be done as often as you prefer!
- The status bar should start updating, give it 30 seconds or so to see if it has connection errors. If not, you can walk away/minimize as it is ready to go!

If you do see an error, simply try syncing again as the initial attempt may fail of the Web Connector tool is currently setup on another employee's machine to sync, we highly suggest UN-checking the "Auto-Run" setting on all non-primary configurations