

QuickBooks Integrator (QBI) Frequently Asked Questions

Why is it mandatory to create a New QuickBooks company file at initial install of QBI?

- 1.) It allows the QBI Specialist to select the preferences during the setup interview that work best with QBI.
- 2.) QBI Specialists are not troubleshooting errors from an existing company file, if any, at initial install sync,
- 3.) Most importantly, QBI synchronizes customer and vendor names using the following naming convention:

Customers - "First Name, Last Name, # Customer Number" (e.g. **John Smith #1234**)

Vendors - "Vendor Name, # Vendor Number or Code" (e.g., **NewPartsVendor#NPV**)

Important note: If the naming format varies from the above mentioned in your company file, duplicate entries will be created for each customer /vendor at first sync.

What happens to my old company file?

You should still have access to other company file(s), but moving forward you will need to use the QBI company file to synchronize Manager SE data. If you are using an incorrect company file you will see the following error message: "Wrong company file."

The QBI Specialist does not have access to any tools that can transfer data from one company file to another, but they can direct you to a website where you can search through several third party applications, for a data transfer service. These are usually fee-based services.

Important Note: The customer is 100% responsible for data manually entered or imported via third party application to the QBI company file. QBI Specialists do not have access to, and will not correct duplicate entries or issues that arise from non-synchronized data.

Is QBI compatible with QuickBooks Online (cloud-based application)?

No, QBI is not compatible with the online version of QuickBooks. Supported versions include: QuickBooks 2009-Present, Pro, Premier and Enterprise (U.S. and Canadian)

Does QBI have to be installed on the Host PC?

QBI can be installed on either the *Host PC* or a *Workstation*. It is important that QBI is setup on a PC that is onsite, and has both QuickBooks (desktop version) and Manager SE installed. A good rule of thumb is to install where it is convenient for the person who will be performing the syncs.

Can QBI be installed on more than one computer?

For technical reasons we do not recommend installing QBI on more than one computer. If a request is made to have QBI installed on a different computer, an un-install of QBI is required immediately following the successful installation on another PC.

What if I want to create a new company file?

First you will need to back up your existing company file, and then your Manager SE database. Create new company file, leave it blank, and then please call us when you are ready so we can reset QBI. Then, after the initial sync you can add any additional data (e.g. banking, employees, payroll, etc.).

What about inventory?

Inventory is now a standard feature with Manager SE 65.47 and up, and with QBI 2.0.91 you now have the option to include or not include inventory when you synchronize.

Important Note: Posted Purchase Orders will not come over during sync if you opt out of including inventory or if you do not close the purchase order in Manager SE.