



PivotNexus for QuickBooks Desktop

Connecting PivotNexus to the QB Web Connector

Introduction

PivotNexus, like other cloud applications, connect to QuickBooks Desktop using the QuickBooks Web Connector. This document describes how to connect PivotNexus to the Web Connector.

Preconditions

Before proceeding the following must be in place.

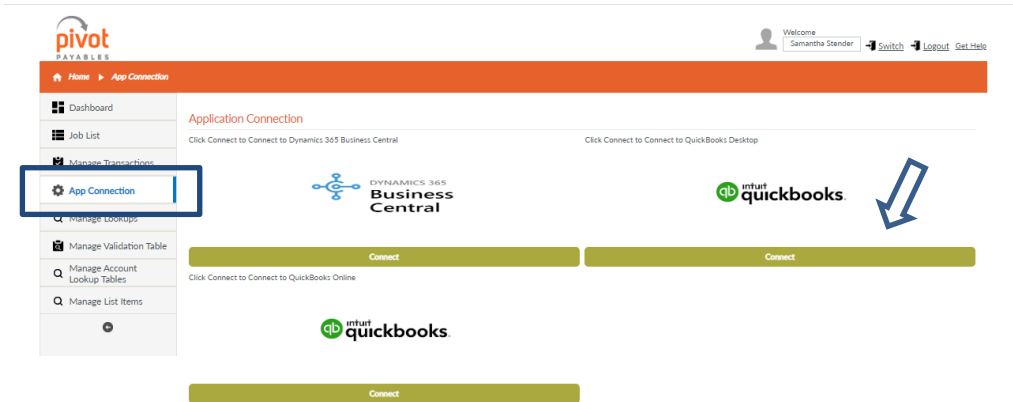
1. You have [Installed](#) the QuickBooks Web Connector program.
2. You have the login credentials for an Integration Administrator user for your PivotNexus entity.
3. You can log into QuickBooks as an Administrator in Single-User Mode.

Downloading the QWC File from PivotNexus

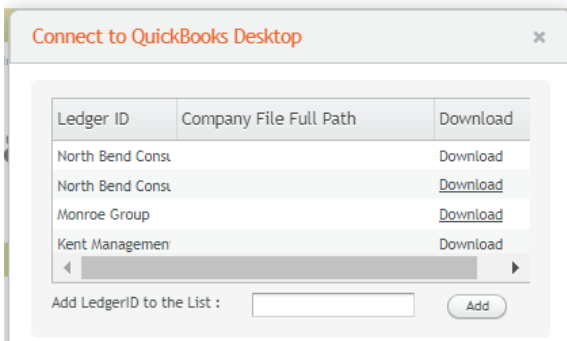
The process begins by downloading the QuickBooks Web Connector or “QWC” file from PivotNexus. This file provides the Web Connector detail about how to connect with PivotNexus including authentication to access PivotNexus. Part of this authentication is creating a password. Later, you will upload this QWC file into the Web Connector, and then enter this password to complete the authentication between the Web Connector and PivotNexus.

Here are the steps.

1. Open Google Chrome.
2. Log into PivotNexus as a **Company Integration Administrator**.
3. Navigate to **App Connection**.



4. Click **Connect to QuickBooks Desktop**.
5. This opens the **Conect to QuickBooks Desktop** company dialog.



Download a QWC file for each company file.

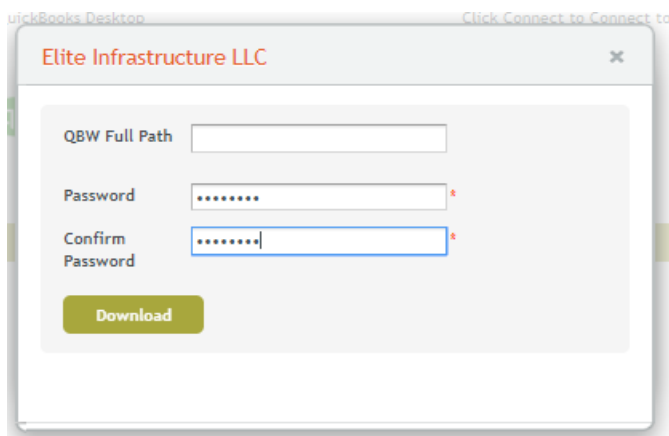
6. You will need to retrieve the exact Company File Name in QuickBooks.
 1. Press the Function and F2 keys to display the Product Information dialog.
 2. Highlight your Company File name, not including the “.QBW” and copy to your clipboard

Product Information ✕

Product QuickBooks Desktop Pro 2018 Release R17P		SERVICES INFORMATION	
License number	Sample License Number	ACTIVATED	AuthID
Product number	578-418	R17_19	Company Realm ID
User Licenses	1		Online Billing Token
Installed	07/02/2018		Shopping Source Token
USAGE INFORMATION		INTEGRATED APPLICATION INFORMATION	
Date First Used	07/02/2018	Number of Uses	710
Audit Trail	Enabled since 12/15/2020 12:34:26		
# of apps		3	
Last accessed		07/29/2022 07:32:00	
CONDENSE INFORMATION		Last run	
Last as of date		None	
Last payroll deleted		None	
Last inventory deleted		None	
FILE INFORMATION		List Information	
Location C:\Users\Public\Documents\Intuit\QuickBooks\Company Files			
Company File Name		.qbw	
Do Not Copy	Copy	Do Not Copy	
File Size	19344 K	V28.0D R6 07/05/2018	
Page Size	4096	V28.0D R12 09/18/2019	
Total Transactions	198	V28.0D R17 04/05/2021	
Total Targets	472		
Total Links	15		
Dictionary Entries	0		
DB File Fragments	6		
Schema version	121.35		
Server Port	55378		
Server IP	10.0.0.172		
Server Name	QB_DENISE-PC_28		
# of Users Logged In	1		
Current Cache Size	513		
Max Cache Size	1024		
Free Memory		4194303 K	
LOCAL SERVER INFORMATION			
Hosting:	local files only	Server IP	10.0.0.172
Initial Cache	512	Server Port	55378
Cache	1024	Server Name	QB_DENISE-PC_28
DB Engine version		17.0.4.2182	

OK
Review last Verify / Rebuild

7. In PivotNexus, paste the Company File name into the “Add LedgerID to the List” field and click **Add**.
8. For each company file, do the following:
 - Click the Download link.
 - Leave the “QBW Full Path” field blank.
 - Enter “Welcome123” as the password and confirm



- Click the **Download** button.
- Store the PivotNexus, QWC file to your computer.

You are now ready to set up the QuickBooks Web Connector.



Setting Up the QuickBooks Web Connector

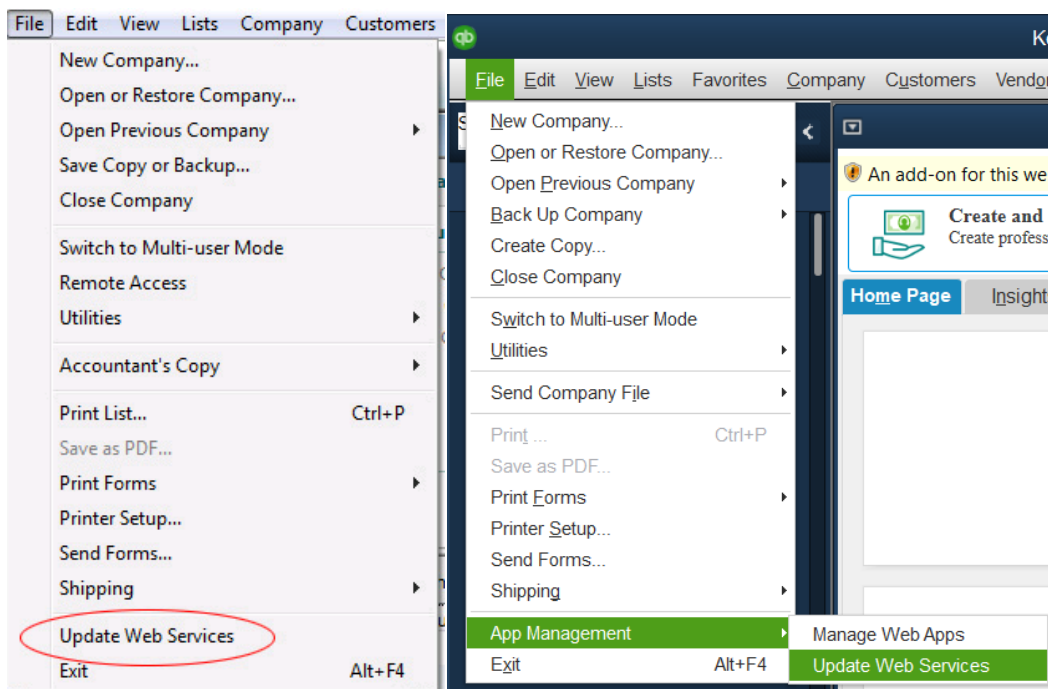
Now that you have downloaded the QuickBooks Web Connector or “QWC” file, the next step is setting up the QuickBooks Connector to connect and synchronize with PivotNexus. You do this from QuickBooks.

Upload the PivotNexus QWC File

First, you will upload the PivotNexus, QWC file, and authorize it to access your QuickBooks company file.

Here are the steps.

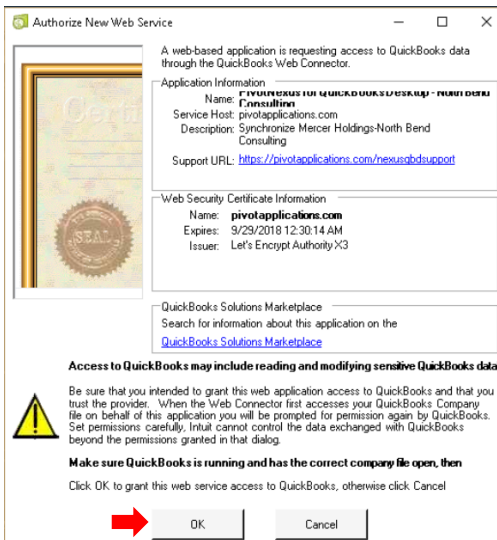
1. Start **QuickBooks** on your computer.
2. Log in as Administrator.
3. Open the company file you want to connect in **Single User Mode**.
! NOTE ! Be sure this is the **ONLY** company file open.
4. Launch the Web Connector by selecting from the **File** menu the **Update Web Services** item.
 - If on the latest version of QuickBooks, you may need to select **File, App Management** and then **Update Web Services**.



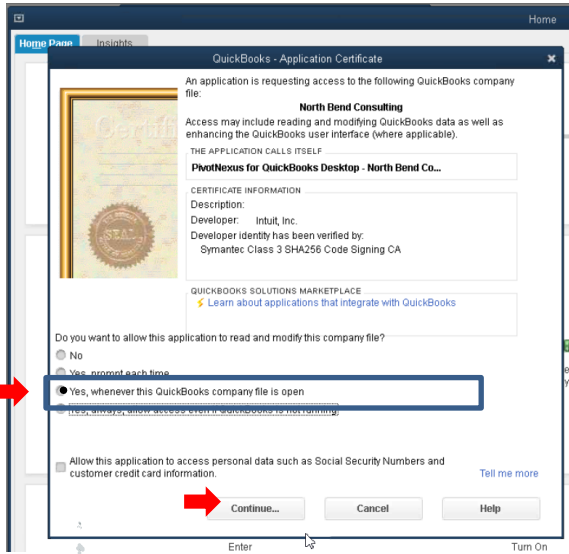
- This launches the Web Connector application.
5. In the Web Connector window, click the **Add Application** button in the lower right-hand corner.



- This opens the **Select a .QWC file** dialog.
6. Browse your computer to find the QWC file you downloaded earlier that is associated to the QuickBooks company file currently open in Single-User Mode.
 7. Select this file and click Open.
 - This opens the **Authorize New Web Service** dialog.



8. Click **OK** to grant **PivotNexus** access to the QuickBooks company file.
 - This opens the **QuickBooks Application Certificate** dialog.
9. Here, you will select what type of access to the indicated company file you want to grant PivotNexus. Select the third option, **Yes, whenever this QuickBooks company file is open.**



10. Click **Done** on the **Access Confirmation** dialog.

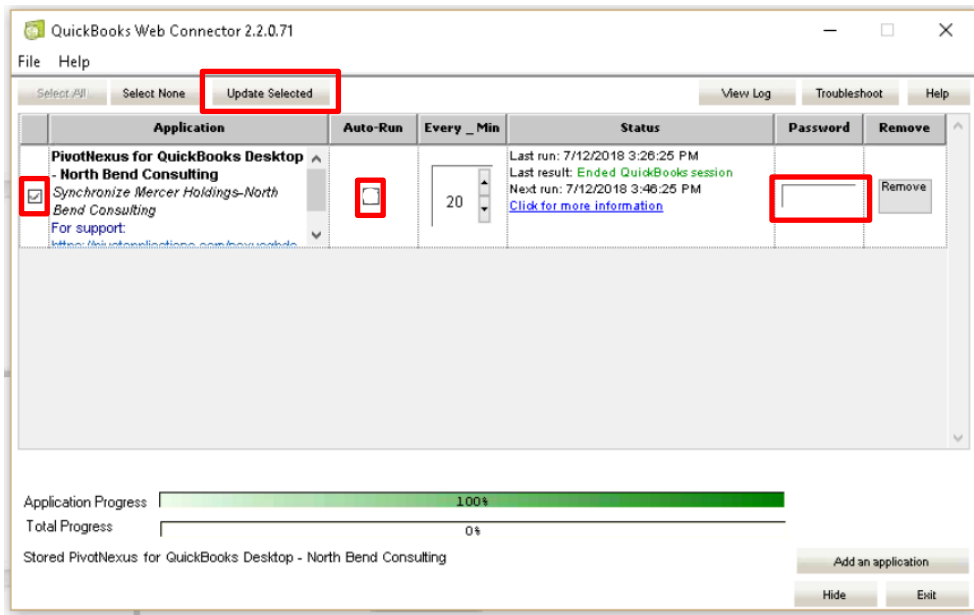
This completes authorizing PivotNexus to access for this company file.

Synching the Web Connector with PivotNexus

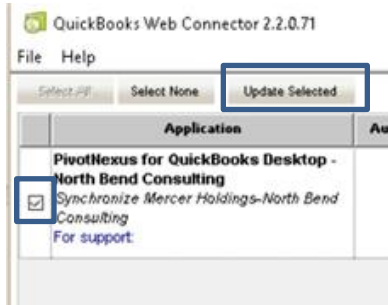
Lastly, you will authenticate the Web Connector to access PivotNexus, and then synchronize PivotNexus with the company file. You will do this individually with each company file.

Here are the steps,

1. After completing the Access Confirmation, the **PivotNexus** application will appear in the list of authorized applications in the Web Connector.



2. In the **Password** field, enter Welcome123 and press Enter on your keyboard.
3. Click **Yes**, to confirm saving the password.
4. Uncheck the **Auto-Run** checkbox.
5. Select the checkbox for **PivotNexus** (If you have multiple company files, be sure to check the correct company file you have open).
6. Click **Update Selected**.



7. This will initiate the synchronization between PivotNexus and the company file.

This completes the setup of the Web Connector for PivotNexus.

Repeat all steps for each QWC and associated company file.

! NOTE ! Be certain to close the previous company file and open the company file you want to connect to a QWC file. Always double check the company file open in Single-User Mode is the correct company file associated to the QWC file you are adding to the Web Connector

Running the QuickBooks Web Connector – Company File Must Be Open

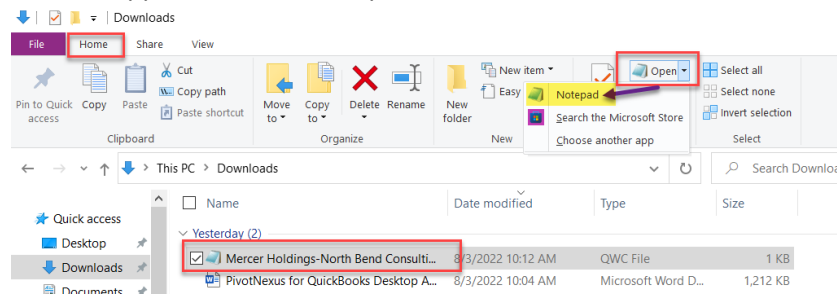
You must run the Web Connector individually for each company file with that company file open.

How to Add the Web Connector Sync to an Additional QuickBooks User

Proceed with Downloading the QWC file steps 1-8 on Pages 1-3 above

Once the Download steps are complete, the QuickBooks Web Connector will need a unique combination of Owner ID and File ID on the downloaded file. To update this, follow the steps below.

- In your Documents Folder, locate the correct .QWC file
- Right-click the file and **Open** the file in Notepad or similar text-editor
 - Note – If unable to right click on the file, please click on the line once to highlight. Then click on Home and the arrow next to the Open. Click Choose another app, then select Notepad.



- **Change the last character** of the “OwnerID” line (for example, if the last character is “B”, change it to “C”)
- **Change the last character** of the “FileID” line (for example, if the last character is “8”, change it to “9”)
- **Save** the file

Proceed with uploading the QWC file in QuickBooks following the steps on Pages 3-6.

Ensure the QuickBooks Web Connector sync password matches on all users – original and newly connected.



Error Messages

OwnerID/FileID Error

You may receive an error relating to the “OwnerID/FileID” values when installing the Web Connector.

Resolution

To resolve the “OwnerID/FileID” error, follow the steps below.

1. Close the error dialogue box
2. Open your file explorer and navigate to where the QWC file is located (usually your Downloads folder)
3. Right-click the file and Open in Notepad or a similar text editor
4. Change the last digit of the string in the OwnerID and FileID rows
 - For example, update “B” character to “C” or “8” to “9”
 - Do not change the text in the carrots at the end (</OwnerID>)
 - Note the error relates to the requirement that the OwnerID/FileID values must be unique – this is why we can get past the error by simply changing a character in each string
5. Save the file
6. Continue reinstalling the application, starting at the “Upload PivotNexus QWC File” section above



Parsing Error

In some cases when installing the Web Connector application, you may receive an error relating to the character values of the Company File Name. In most cases, this is related to an & (ampersand) character in the Company File Name.

Resolution

Open the QWC file in a text editor such as Notepad. Replaced the references to "&" to "&".

Example below:

Original Reference: <AppName>PivotNexus – Sales & Marketing, LLC</AppName>

Replaced with: <AppName>PivotNexus - Sales & Marketing, LLC</AppName>

Characters that need to be escaped (to obtain a well-formed XML document):

- The < must be escaped with a < entity, since it is assumed to be the beginning of a tag.
- The & must be escaped with a & entity, since it is assumed to be the beginning a entity reference
- The > should be escaped with > entity. It is not mandatory -- it depends on the context -- but it is strongly advised to escape it.
- The ' should be escaped with a ' entity -- mandatory in attributes defined within single quotes but it is strongly advised to always escape it.
- The " should be escaped with a " entity -- mandatory in attributes defined within double quotes but it is strongly advised to always escape it.

Removing PivotNexus from the QB Web Connector

Before Proceeding

This section explains how to disconnect PivotNexus from the Web Connector.

The following must be in place before continuing.

1. You have the machine the Web Connector is installed on (ideally).
2. You can log into QuickBooks as an administrator in single-user mode.

Unsyncing PivotNexus

Remove Application:

1. Start **QuickBooks** on your computer.
2. Open the company file you want to disconnect and log in as an **Administrator**.
3. Switch to **Single User Mode**.
4. Click **Edit**.
5. Click **Preferences**.
6. Click **Integrated Applications**.
7. Click **Company Preferences**.
8. Select the PivotNexus application you wish to disconnect.
9. Click **Remove**.
10. Click **Yes**.
11. (Repeat this process for all web connector applications you need to remove. Be sure to only have open the single company file associated to the application you wish to remove.)

