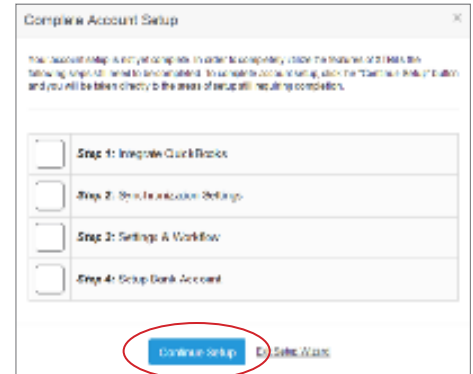CIRCULUS

INTEGRATING WITH QUICKBOOKS® DESKTOP

STEP 1

Once logged in to the Circulus platform, you will be presented with the Setup Wizard. Proceed to Step 1 by clicking **Continue Setup**, and select **QuickBooks Desktop** from the Accounting Software dropdown menu.

> ℹ️ Have your QuickBooks company open in your QuickBooks Desktop software prior to beginning Circulus account setup.

STEP 2

Next, you'ill need to enter your Company's QuickBooks Desktop Company filepath. For most, the default filepath for a QuickBooks Desktop installation is as shown below. **Simply copy and paste the path below** into the filepath field in Step 1, and enter your company name just before the .qbw file extension:
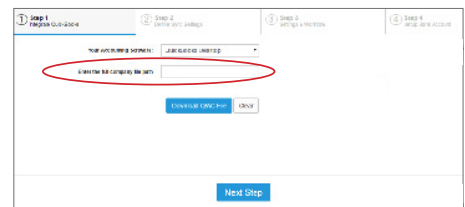
C:\Users\Public\Documents\Intuit\QuickBooks\Company Files**CompanyName**.qbw

Once entered, simply click the **Download QWC** File button. Your file will begin downloading automatically, and you will be provided with a QBWC Password, which will be needed in Step 5 of the integration process.

STEP 3

When the QWC file has completed downloading, open the file and Web Connector will open automatically, asking you to grant permission for Circulus to access your QuickBooks data. Click **OK** ,and you will then be taken to the next step.

> ℹ️ If you haven't done so, you'll need QuickBooks Web Connector installed in order to complete this process. This can be found at:
>
> http://marketplace.intuit.com/webconnector/
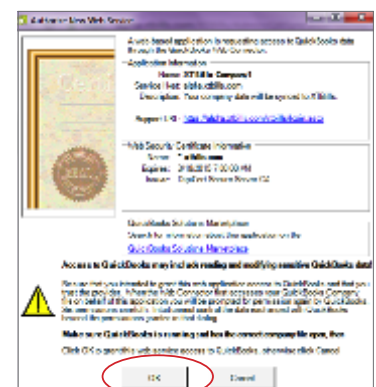
STEP 4

Next, you'ill be re-directed to a QuickBooks Application Certificate. For optimal synchronization, select the last option labeled:

"Yes, always; allow access even if QuickBooks is not running"

This will allow you to sync your QuickBooks and Circulus accounts without having QuickBooks Desktop running. Click **Continue**, at which point you will be presented with a Confirmation screen. Simply click **Done** and move on to Step 5.

STEP 5

At this point, copy the **QBWC Password** generated in Step 2 into the Password column in Web Connector. After entering the password, you will be prompted to save your changes. Once saved, you're ready to move on to the final step.
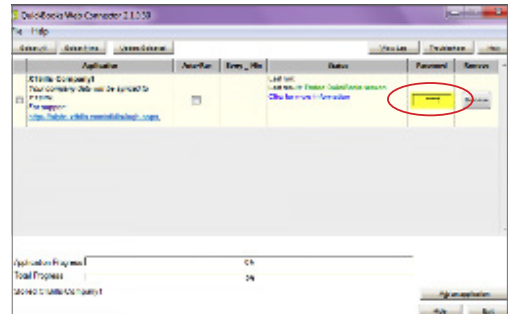

STEP 6

Finally, select the checkbox next to your QBWC company file within Web Connector and click the Update Selected button. You will then receive a notification that your company has been successfully integrated with Circulus. At this point, you can sync your accounts at any time by clicking Update Selected.

Setting the Auto-Run Option:
If you would like to set your account to auto-sync, simply activate the Auto-Run checkbox, enter your preferred sync frequency (in minutes) and click Update Selected. Your account will then be set to auto-sync based on your chosen schedule. Upon each sync event, you will be presented with a status update, appearing in the bottom right-hand corner of your screen.

Once completed, you can return to Circulus to complete the setup process.
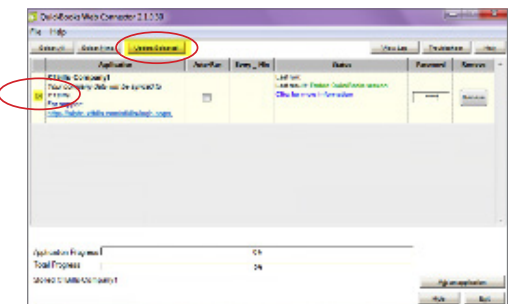
> ℹ️ You must complete an initial synchronization from QuickBooks desktop (as outlined above) in order to complete your setup.