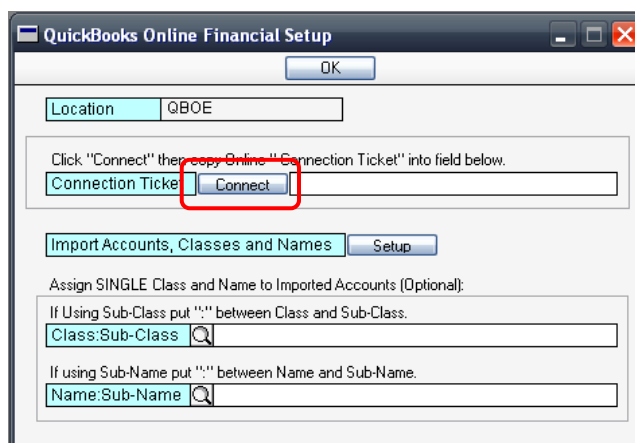


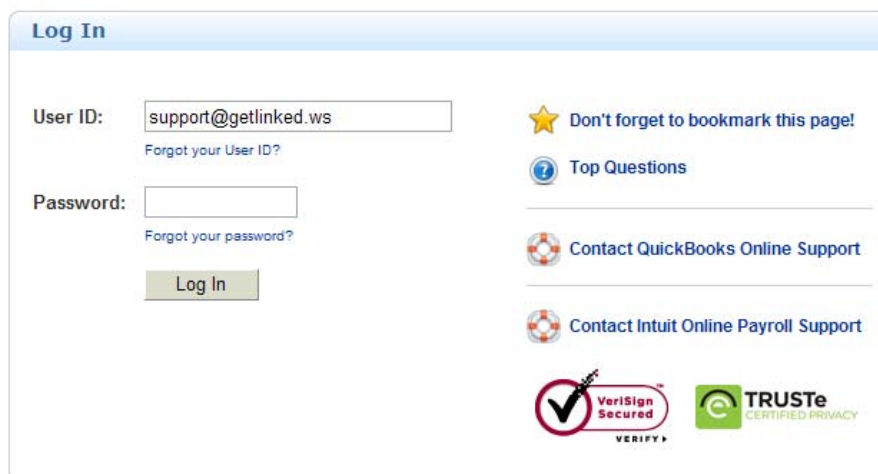
QuickBooks Online requires a “Connection Ticket” to communicate with GETLinked. Click the “Connect” button to start the QuickBooks Online connection setup interview.



After clicking the “Connect” button above you will be taken to the QuickBooks Online login screen where you can login with your QuickBooks Online User ID and Password.



⚠ Having trouble with the new login? We have a great [knowledge base article](#) that will help!



Once you have logged in you will start the Connection Setup Interview.

QuickBooks Online

**Connection Setup Interview**



**How does a connection work?**

A connection lets data flow in both directions. Using GETLinked Software, you can:

- Send changes or additions to your QuickBooks Online company data.
- Copy data from QuickBooks Online to GETLinked Software.

**Caution:** Once data has been shared, you cannot undo it or delete it in an automated way. If you need to make adjustments, you'll need to make individual edits.

Intuit has not yet confirmed the features nor the identity of GETLinked Software. We strongly suggest that you verify these issues before allowing any sort of data transfer.

Intuit is not responsible for the accuracy of data sent to QuickBooks Online from any other application.

[Continue](#)
[Cancel](#)

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Feel free to change the Connection Name to suit your needs.

QuickBooks Online

**Connection Setup Interview**



**Connection Name**

**Why should I name a connection?**

The name you give a connection distinguishes it from other connections. For example, you may want to distinguish transactions entered from separate computers on which GETLinked Software is installed.

If you plan to have only one connection between GETLinked Software and your QuickBooks Online company the connection name is less important.

**Where will I see the name?**

In QuickBooks Online, you see the connection name in the Activity Log.

Connection Name:

[Continue](#)
[Cancel](#)

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The POSLink interface requires “All Accounting” access rights to be able to create journal entries and read from the Chart of Accounts.

## QuickBooks Online

### Connection Setup Interview



#### Access Rights

How does this choice enhance security?

This choice lets you control which data can be shared by this connection.

##### Access Rights:

- ☒ **All Accounting** - Share data related to Customers & Sales and Vendors & Purchases plus other data such as the Employee List, deposits, fund transfers, journal entries, budgets, reconciliation, and the Chart of Accounts.
- ☐ **Limited** - Restrict access to one or both of the following:
- ☐ **Customers & Sales Only** - Share data related to customers or sales, such as invoices, sales receipts, credit memos, refunds charges, credits, statements, payments received from customers, time sheets, the Customer List, and the Products and Services List.
  - ☐ **Vendors & Purchases Only** - Share data related to vendors or purchases, such as bills from vendors, checks, cash purchases, credit card purchases, and the Vendor List.

No matter which choices you make, QuickBooks Online administration data, such as Subscription Information and the User List are **not** shared.

[Continue](#) [Cancel](#)

GETLinked supports “No Login Security”. Select “No” and click “Create Connection”

## QuickBooks Online

### Connection Setup Interview



#### Login Security

With **Login Security** set to **Yes**, each time anyone tries to use this connection, the user must first log into your QuickBooks Online company. Then that user receives a temporary login key to paste back into GETLinked Software.

To protect your company data, Intuit recommends restricting access to the smallest number of users. If every user of QuickBooks Online is also a user of GETLinked Software, it might be appropriate to choose the companywide level of security. Otherwise select only those users who are also users of GETLinked Software.

If there are additional GETLinked Software users who need to use this connection, add them as users of your QuickBooks Online company after you complete this interview. To prevent them from viewing accounting data within your company, set them up as Regular Users with None for their access rights.

##### Turn on login security?

- ☒ **No**. Anyone who can run GETLinked Software on this computer can use the connection.
- ☐ **Yes**. Allow all GETLinked Sample Company users to log in to use this connection.
- ☐ **Yes**. Allow only these users to use this connection:
- ☒ Peter Shaw

[Create Connection](#) [Cancel](#)

Confirm that you want to turn off Login Security to continue.


You have chosen to turn off login security. Because GETLinked Software is not a signed server-based application, the safety of your connection key cannot be assured. If your connection key is stolen or otherwise compromised, it can be used outside of GETLinked Software to gain access to your QuickBooks Online company without your approval. To help protect your company data, Intuit suggests that you do not turn off login security.

Please acknowledge that you have read this warning by confirming your choice below.

The next screen will have the Connection Key that needs to be copied to the GETLinked QuickBooks Online Setup Screen. After you copy the Connection Key to GETLinked click "Continue".

QuickBooks Online

### Connection Setup Interview



**Copy and paste the connection key.**  
The connection key is a private code that lets your copy of GETLinked Software connect to QuickBooks Online. This is the type of key you copy only once for each connection you set up.

1. Click **Copy to Clipboard**
2. Keep this window open and follow instructions from GETLinked Software to insert the key.  
(You can use Ctrl+V to paste.)

**Connection Key:**

**Don't paste the key anywhere else.**  
Do not make any additional copies of your connection key or write it down anywhere. It should be stored only in GETLinked Software. In the unlikely event that you need to retrieve the connection key, you can rerun this interview and reselect this connection name.

QuickBooks Online Financial Setup

Location

Click "Connect" then copy Online "Connection Ticket" into field below.

Connection Ticket

Import Accounts, Classes and Names

Assign SINGLE Class and Name to Imported Accounts (Optional):

If Using Sub-Class put ":" between Class and Sub-Class.

Class:Sub-Class

If using Sub-Name put ":" between Name and Sub-Name.

Name:Sub-Name



Click “Finished” to complete the Connection Setup Interview.

## QuickBooks Online

### Connection Setup Interview



#### Congratulations!

You have successfully created a new connection to allow data sharing between GETLinked Software and your QuickBooks Online company.

#### Test the connection immediately

Follow instructions from within GETLinked Software to begin sharing data. For your first test, try sharing the smallest amount of data possible.

#### Can I edit this connection later?

Yes, you can change the settings for all your connections from within QuickBooks Online. Open the Company menu and choose Administer Company. Then choose the Connection List.

**Finished**