If you run an application from the Intuit Workplace that synchronizes data with a QuickBooks company, you need to install and use the Workplace Sync Agent. You are prompted to install the Agent the first time you run the application.

You are also be prompted to either use sample test data or use a specific company file. Sample data (called "test") is useful for seeing how the application works without putting unwanted data in a real live QuickBooks company. When you are ready to synchronize real data with a production QuickBooks company you choose the QuickBooks company file you want to use. The first time you set up sync with a QuickBooks company file you need to have the QuickBooks company file open and you must be the QuickBooks administrative user since you must authorize the synch for that company in QuickBooks.

Running a Workplace Sync Application the First Time

The first time you run an application you are prompted to select test data or to setup a new synchronization. You'll need to do this once. After that, synchronizations will occur automatically.

Setting Up a New Synchronization

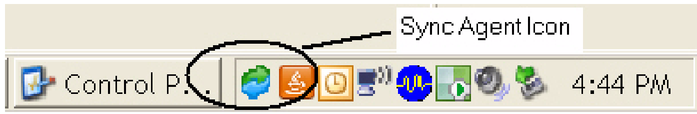
We'll go through the process in the following video. Instructions are provided in text captions in the video.

Using WORKPLACE SYNC: The End USER FAQ

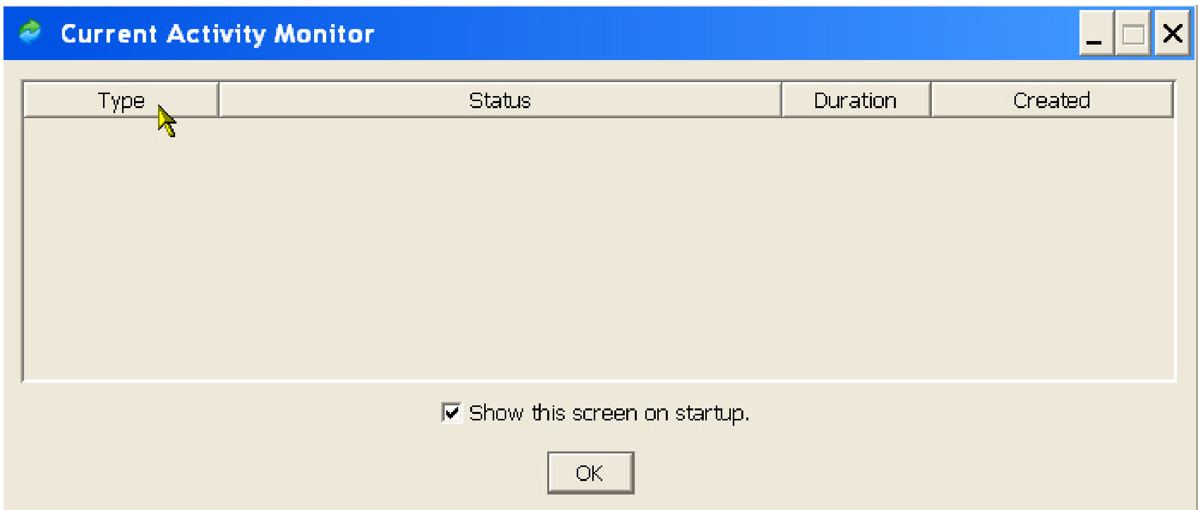
The are some limitation or special behaviors of the Workplace Sync feature that you need to know. For a list of these, see the *Workplace Sync User FAQ*.

Administering WorkPlace Sync

Each Sync instance is installed in your system separately, and appears separately in your system tray:



Double-clicking on the icon brings up the status monitor, which is a display-only control showing any current sync activity:



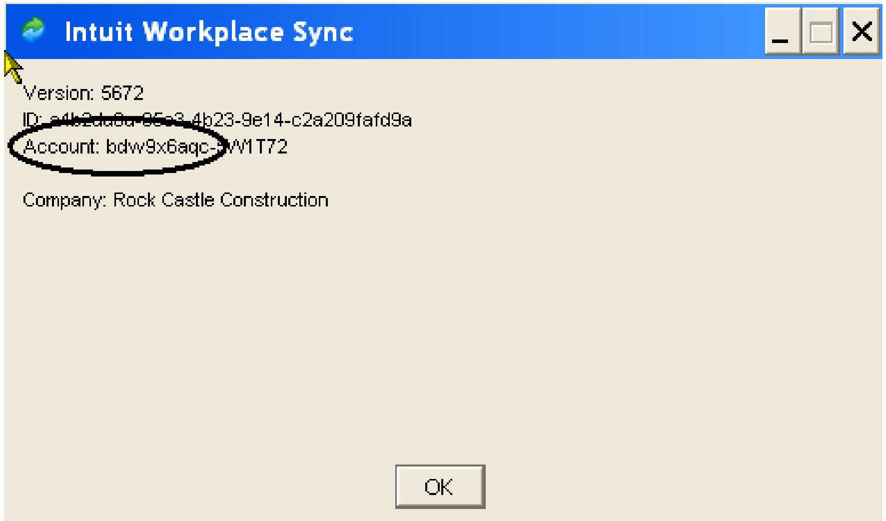
Right-clicking on the icon brings up a submenu, as shown in this demo:

Removing a Sync

If you need to remove a Sync, you can do so from the Windows Control Panel, using the Add or Remove Progams feature. You can have several Syncs, so you need to be careful about which Sync you are removing.

To help you choose the correct Sync, look at how the Sync is identified in the Add/Remove Programs panel:

Each Sync is identified by its account number, which you can find by right-clicking on the Agent icon and selecting About:


Intuit Workplace Sync
Version: 5672
ID: e4b2dd0d-85e3-4b23-9e14-c2a209fafd9a
Account: bdw9x6aqc- W1T72
Company: Rock Castle Construction
OK