

# WORKPLACE SYNC USER FAQ

**Q: What do I need to have in order to synchronize my QuickBooks data with a Workplace application?**

A: You must have QuickBooks 2008 or newer (any version except Simple Start). Your system must meet the Minimum System Requirements in the Release Notes. And you must have Java 1.6 or greater.

**Q: What QuickBooks objects are synchronized with my Intuit Workplace applications?**

A: Workplace Sync currently synchronizes QuickBooks Customer, Employee, and Vendor objects.

**Q: What QuickBooks objects are not synchronized?**

A: Workplace Sync does not currently synchronize object references, custom fields, or any personal data, i.e. credit card numbers, social security numbers, etc. In addition, other objects not supported by the QuickBooks SDK are excluded, including employee payroll information, military status, ethnicity, etc.

**Q: What if I modify a Customer object in QuickBooks at the same time that Customer object is updated in my Intuit Workplace application?**

A: QuickBooks is designated as the system of record. Therefore, in the unlikely event that an existing object is modified on both systems, the QuickBooks version will overwrite the changes on Intuit Workplace.

**Q: How long does the initial synchronization take?**

A: Depending on the number of records you have in your Company file, the initial process can take a while to complete, i.e. 1000 records take ~15 minutes. You can continue working on your computer during the synchronization process, although you will not be able to access the data in your Intuit Workplace application until the synchronization is complete. You can monitor the process through the pop-up notification in the system tray.

**Q: Where can I go to see the results of each of my synchronization?**

A: After you install Workplace Sync you will find a Intuit Workplace application which matches the name of your company file in the “My Applications” section of the Intuit Workplace homepage. Opening this application will display a “Synchronization Status” tab, which will give you information about your past synchronizations. To get more details, you can click “Show details” to open up the record and once more to get into the results for each table.

**Q: How do I force a synchronization to happen?**

A: If you have administrative permissions to your Intuit Workplace Company file application, you can force synchronization. Open the appropriate Company file application from the “My Applications” section of your Intuit Workplace homepage. Click the “Sync Now” button to start the synchronization process.

Q: How can I force a synchronization if I don't have administrative access?

A: A synchronization is started whenever the application is started (presuming it is integrated with QuickBooks data).

Q: Do I need to leave QuickBooks open on my computer in order for the synchronization to occur?

A: No, Workplace Sync will automatically open up QuickBooks in the background, when necessary. Note: If you have more than one QuickBooks company file, and you have one of the company files open in QuickBooks, only the currently open company file will be able to synchronize with Intuit Workplace at that time.

Q: I have changed the location of my QuickBooks company file and now my Intuit Workplace applications are not syncing with QuickBooks?

A: If you change the location of your company file, you must update the Workplace Sync Agent with the new location by right clicking the appropriate “Intuit Workplace Sync” icon in the system tray and selecting Properties.

Q: I changed my Intuit Workplace password and now my synchronization fails, what can I do to correct this?

A: If you change the password of your Intuit Workplace account, you must change your user and password in the Workplace Sync application. Right click the “Intuit Workplace Sync” icon in the Windows notification area (usually in the bottom right corner of the screen) and select “Properties”. You may then update your username and/or password, as necessary.

Q: Why are some of the records that I create in my Intuit Workplace applications unable to synchronize with QuickBooks?

A: QuickBooks enforces several business rules that your Intuit Workplace application may not enforce, therefore it is possible for you to create data in your Intuit Workplace application that QuickBooks rejects during synchronization. For this reason you should periodically consult your Company file application to identify any synchronization problems you need to resolve. Typical problems can be resolved by simply modifying the offending record to correct the problem.