

## Release Notes, QuickBooks SDK 7.0 (10/17/07)

Welcome to the QuickBooks Software Development Kit (SDK) Version 7.0.

### **IMPORTANT**

This software is designed for use with US editions of QuickBooks 2008 and QuickBooks Merchant Service. In addition, selected features of this software can be used with US editions of QuickBooks 2002, 2003, 2004, 2005, 2006, 2007, QuickBooks Online Edition, and certain Canadian and UK editions of QuickBooks (2003 and later). However, you cannot currently install and use QuickBooks for different countries on the same machine.

## Release Note History

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In order to see what changed, especially which field values, enums, and QBFC-related items changed from release to release, you need to take a look at the Release Notes for the periods you are interested in. Release Notes from SDK 3.0 to the current release can be found at the IDN website.

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## A Note About Credit Card Numbers in QB 2008 and Later

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Due to requirements of the payment card industry, QuickBooks 2008 and later will mask all credit card data returned from SDK requests. All responses that return credit card information will return only masked numbers, even in a customer query, when invoked against QuickBooks 2008 and later.

## What’s New in SDK 7.0?

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In this version of the QuickBooks SDK, our goal was to make it easier for you to develop applications for QuickBooks by providing new and enhanced tools, greater access to QuickBooks features, and improved performance for your customers in the most widely used queries.

### Overview

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Here is what’s new:

- Our totally revamped Onscreen Reference (OSR) provides one central, unified access point where you can find out everything you need to know for all SDKs:
  - > All current SDKs on one page
  - > Maps Quickbooks UI to SDK request fields
  - > Links to related topics (doc and Alpha Geek) from each request
  - > C# and VB.Net sample code
- Our new Visual Studio Application Template (for C#) significantly decreases coding time and learning curve through:
  - > Code generation resulting from responses to a wizard
  - > Built-in session management for each supported QuickBooks connection type
  - > A self-contained COM event handler requiring that the developer only implement application logic within your project template’s generated event handler stub.
- QuickBooks Web Connector 2.0 has been updated to include an asynchronous pluggable protocol handler which allows web-based applications to directly interact with the web connector from Javascript. (With Version 2.0 the protocol handler works only with Internet explorer.) Other additions and enhancements have also been made: for more information see “What’s New in QBWC Web Connector 2.0.”

- After a brief hiatus, the Remote Data Sharing feature has been updated and re-included with the SDK. The new RDS is completely rewritten in .NET and is expected to be much more robust than the previous version.
- More QuickBooks features are available through the SDK:
  - > Accounts now support tax lines
  - > BuildAssemblyAdd now allows you to create pending builds
  - > CheckAdd now supports linking to certain transactions, which makes it much easier to issue direct refunds. (In the 7.0 qbXML spec, but to be implemented in the R3 patch to QB2008.) Likewise, CheckQuery has the IncludeLinkedTxns boolean added to support this new functionality but that won't be available til R3 either.
  - > Credit card transaction (requires QBMS) enhancements
    - CompanyQuery returns subscribed-to services (QBMS, payroll, etc)
    - Multiple credit card transactions supported in one SalesReceipt
    - Multiple credit card transactions supported in one CreditMemo
    - PaymentMethodAdd allows setting of payment type, using supplied enum
    - ReceivePayment supports Auths and subsequent Captures
  - > CustomerQuery up to 5 times faster
  - > DepositMod
  - > Estimates add Ship-to and price level fields
  - > ListMerge, for merging accounts, customers, vendors
  - > Item enhancements:
    - manufacturers part number
    - modify income and expense accounts referenced by the item
  - > List objects (customers, vendors, items, etc) get their TimeModified updated whenever their balance, on-hand quantity, linked transaction changes
  - > Queries provide better support for TimeModified filters
  - > Unattended mode performance improved through faster QB Start-up
  - > Unit of measure support, consisting of UnitOfMeasureSetAdd/Query and also unit of measure support in Items and transaction lines)
  - > VendorQuery up to twice as fast
  - > Workers compensation codes (Add, Mod, Query)

## The New OnScreen Reference (OSR)

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In QB SDK 6.0, an early version of an AJAX-based OSR was made available. The SDK 7.0 OSR enhances this version with more functionality and content.

### **Automatic Filtering for Specified QuickBooks and qbXML-Level**

One of the key improvements in the new OSR is automatic filtering, which can save you from making mistakes. In the new OSR, you select the version(s) of QuickBooks that you are interested in, the qbXML spec level, and the OSR automatically displays only the requests and request fields that apply to what you have specified.

## **All SDKs from IDN Available in Left Navigation Pane**

Another key benefit is the inclusion of OSRs for all SDKs available for IDN in the left navigation pane. Those are listed even if not installed and you can click on the links to download those SDKs when you are ready for them.

## **New qbXML and C# Samples for each Request**

Each qbXML request now has sample qbXML script showing how it is built. The QBFC version of these requests now have C# as well as VB.Net samples.

## **Each Request Has Topic-Level Links to Programmer's Guide**

Prior to the SDK 7.0 release, after reading the brief description in the OSR, you had to search through the QBSDK Programmer's Guide to find more detailed description within the chapters in that guide. Starting with SDK 7.0, each request links directly to the related material in the Guide, to save you time and possibly errors.

## **Links to AlphaGeek and Other Information**

Along with Programmers' Guide links, some of the requests have links to other articles, such as AlphaGeek articles.

## **Error-Code Lookup**

A handy improvement in the new OSR is the error lookup control on the main page. Just supply the QB error code, either in decimal or hex, depending on what you have, and the explanation is displayed for you.

## **The New Visual Studio C# QBSDK Project Template**

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Because the process of connecting to QuickBooks and sending requests is the same from application to application, we built a Visual Studio C# Application Template. A wizard guides you through a series of questions and then auto-generates code for you as a function of your responses. All of the connection types (QB desktop, QBOE, etc) are supported. Your task is simplified as you only need to add the desired QuickBooks requests using QBFC.

We also implemented error trapping and logging for you in the template project, to aid in debugging your customer's problems. Three levels of logging are available: none, critical errors only, all errors, and verbose.

Finally, we added an entire COM event handler for you, if it is required. The wizard asks you a series of questions about what types of events you want to use in your application. Logic is employed in the process that adheres to SDK or license restrictions (such as only being able to specify one menu structure per application). We even included a GUID generator for your subscription ID.

## Deprecated Features or Features No Longer Supported

NA

## Do You Integrate With QBMS?

If your application integrates with the QuickBooks Merchant Service, be sure to take a look at some of the important changes in this area. Check the [IDN website](#) for more information about these changes.

## Request/Field-Level Detail Of New and Changed Features

### **NOTE**

None of the new or changed features listed below apply to QBOE unless explicitly stated.

The following table lists the changed behavior and/or fields for each SDK request:

Object	Operation	Changes
Account	Add Mod	TaxLineID added
AccountTaxLineInfo	Query	new request added
ARRefundCreditCard	Add Query	CreditCardTxnType added to CreditCardTxnInputInfo aggregate
Bill	Add	UnitOfMeasure added to ItemLineAdd and ItemGroupLineAdd
	BillMod	UnitOfMeasure and OverrideUOMSetRef added to ItemLineMod and ItemGroupLineMod
	BillQuery	UnitOfMeasure and OverrideUOMSetRef added to ItemLineRet and ItemGroupLineRet
BuildAssembly	Add Mod	MarkPendingIfRequired boolean added
Charge	Add	UnitOfMeasure added
	Mod	UnitOfMeasure and OverrideUOMSetRef added
	Query	UnitOfMeasure and OverrideUOMSetRef added to the Ret

<b>Object</b>	<b>Operation</b>	<b>Changes</b>
Check	Add	ApplyCheckToTxnAdd added. UnitOfMeasure field added to ItemLineAdd and ItemGroupLineAdd
	CheckMod	ApplyCheckToTxnMod added. UnitOfMeasure and OverrideUOMSetRef added to ItemLineMod and ItemGroupLineMod
	CheckQuery	IncludeLinkedTxns added to the request. LinkToTxn added to the CheckRet
Company	Query	SubscribedServices added to the CompanyRet
CreditCardCharge	Add	UnitOfMeasure added to ItemLineAdd and ItemGroupLineAdd
	Mod	UnitOfMeasure and OverrideUOMSetRef added to ItemLineMod and ItemGroupLineMod
	Query	UnitOfMeasure, OverrideUOMSetRef, and CreditCardTxnInfo added to ItemLineRet and ItemGroupLineRet
CreditCardCredit	Add	UnitOfMeasure added to ItemLineAdd and ItemGroupLineAdd
	Mod	UnitOfMeasure and OverrideUOMSetRef added to ItemLineMod and ItemGroupLineMod
	Query	UnitOfMeasure, OverrideUOMSetRef, and CreditCardTxnInfo added to ItemLineRet and ItemGroupLineRet
CreditMemo	Add	UnitOfMeasure and CreditCardTxnInfo added to CreditMemoLineAdd and CreditMemoGroupLineAdd
	Mod	UnitOfMeasure and OverrideUOMSetRef added to CreditMemoLineMod and CreditMemoGroupLineMod
	Query	UnitOfMeasure, OverrideUOMSetRef, and CreditCardTxnInfo added to CreditMemoLineRet and CreditMemoGroupLineRet
Deposit	Mod	New request

Object	Operation	Changes
Estimate	Add	ShipAddress added UnitOfMeasure and PriceLevelRef added to EstimateLineAdd UnitOfMeasure is added to EstimateGroupLineAdd
	Mod	ShipAddress added UnitOfMeasure, OverrideUOMSetRef, and PriceLevelRef added to EstimateLineMod. UnitOfMeasure and OverrideUOMSetRef added to EstimateGroupLineMod
	Query	UnitOfMeasure and OverrideUOMSetRef added to EstimateLineRet and EstimateGroupLineRet ShipAddress and ShipAddressBlock added to the Ret.
Invoice	Add	UnitOfMeasure added to InvoiceLineAdd and InvoiceGroupLineAdd
	Mod	UnitOfMeasure and OverrideUOMSetRef added to InvoiceLineMod and InvoiceGroupLineMod
	Query	UnitOfMeasure and OverrideUOMSetRef added to InvoiceLineRet and InvoiceGroupLineRet
ItemDiscount	Mod	AccountRef added ApplyAccountRefToExistingTxns added
ItemGroup	Add	UnitOfMeasureSetRef added UnitOfMeasure added to ItemGroupLine
	Mod	UnitOfMeasureSetRef added ForceUOMChange added UnitOfMeasure added to ItemGroupLine
	Query	UnitOfMeasureSetRef added to Ret UnitOfMeasure added to ItemGroupLineRet
ItemInventory	Add	ManufacturerPartNumber added UnitOfMeasureSetRef added
	Mod	ManufacturerPartNumber added UnitOfMeasureSetRef added ForceUOMChange added IncomeAccountRef added ApplyIncomeAccountRefToExistingTxns added
	Query	ManufacturerPartNumber and UnitOfMeasureSetRef added to Ret

Object	Operation	Changes
ItemInventoryAssembly	Add	UnitOfMeasureSetRef added
	Mod	UnitOfMeasureSetRef added ForceUOMChange added IncomeAccountRef added ApplyIncomeAccountRefToExistingTxns added
	Query	UnitOfMeasureSetRef added to Ret
ItemNonInventory	Add	ManufacturerPartNumber added UnitOfMeasureSetRef added
	Mod	ManufacturerPartNumber added UnitOfMeasureSetRef added ForceUOMChange added In the SalesOrPurchaseMod aggregate AccountRef added ApplyAccountRefToExistingTxns added In the SalesAndPurchaseMod aggregate IncomeAccountRef added ApplyIncomeAccountRefToExistingTxns added ExpenseAccountRef added ApplyExpenseAccountRefToExistingTxns added
	Query	ManufacturerPartNumber and UnitOfMeasureSetRef added to Ret
ItemOtherCharge	Mod	In the SalesOrPurchaseMod aggregate AccountRef added ApplyAccountRefToExistingTxns added In the SalesAndPurchaseMod aggregate IncomeAccountRef added ApplyIncomeAccountRefToExistingTxns added ExpenseAccountRef added ApplyExpenseAccountRefToExistingTxns added
ItemReceiptAdd	Add	UnitOfMeasure added to ItemLineAdd and ItemGroupLineAdd
	Mod	UnitOfMeasure and OverrideUOMSetRef added to ItemLineMod and ItemGroupLineMod
	Query	UnitOfMeasure and OverrideUOMSetRef added to ItemLineRet and ItemGroupLineRet



Object	Operation	Changes
ItemServiceAdd/Query	Add	UnitOfMeasureSetRef added
	Mod	UnitOfMeasureSetRef added ForceUOMChange added In the SalesOrPurchaseMod aggregate AccountRef added ApplyAccountRefToExistingTxns added In the SalesAndPurchaseMod aggregate IncomeAccountRef added ApplyIncomeAccountRefToExistingTxns added ExpenseAccountRef added ApplyExpenseAccountRefToExistingTxns added
	Query	UnitOfMeasureSetRef added
ListDel		UnitOfMeasureSet added to enum list of deletable objects.
ListMerge		new request
PaymentMethod	Add Query	PaymentMethodType enum is added. Available values are:  AmericanExpress Cash Check DebitCard Discover ECheck GiftCard MasterCard Other OtherCreditCard Visa
PurchaseOrder	Add	UnitOfMeasure and ManufacturerPartNumber added to PurchaseOrderLineAdd UnitOfMeasure added to PurchaseOrderLineGroupAdd
	Mod	UnitOfMeasure, OverrideUOMSetRef, and ManufacturerPartNumber added to PurchaseOrderLineMod  UnitOfMeasure, OverrideUOMSetRef, and ManufacturerPartNumber added to PurchaseOrderLineGroupMod
	Query	UnitOfMeasure and OverrideUOMSetRef added to PurchaseOrderLineRet and PurchaseOrderLineGroupRet

Object	Operation	Changes
ReceivePayment	Add	CreditCardTxnType added to CreditCardTxnInfo
	Mod	CreditCardTxnInfoMod added.
	Query	CreditCardTxnType added to CreditCardTxnInfo
SalesOrder	Add	UnitOfMeasure added to SalesOrderLineAdd and SalesOrderGroupLineAdd
	Mod	UnitOfMeasure and OverrideUOMSetRef added to SalesOrderLineMod and SalesOrderGroupLineMod
	Query	UnitOfMeasure and OverrideUOMSetRef added to SalesOrderLineRet and SalesOrderGroupLineRet
SalesReceipt	Add	UnitOfMeasure and CreditCardTxnInfo added to SalesReceiptLineAdd UnitOfMeasure added to SalesReceiptGroupLineAdd
	Mod	UnitOfMeasure and OverrideUOMSetRef added to SalesReceiptLineMod and SalesReceiptGroupLineMod
	Query	UnitOfMeasure, OverrideUOMSetRef, and CreditCardTxnInfo added to SalesReceiptLineRet and SalesReceiptGroupLineRet
UnitOfMeasureSet	Add	New requests
	Query	
VendorCredit	Add	UnitOfMeasure added to ItemLineAdd and ItemGroupLineAdd
	Query	UnitOfMeasure and OverrideUOMSetRef added to ItemLineRet and ItemGroupLineRet
WorkersCompCode	Add	New requests
	Mod	
	Query	

## Changes Impacting QBFC Integrations

If you recompile your application with QBFC7, you may need to change your code slightly if

- You use any of these Add or Mod requests, due to the addition of the OverrideUOMSetRef to those requests.:
  - > Invoice
  - > Estimate

- > SalesOrder
  - > SalesReceipt
  - > CreditMemo
  - > Estimates (for changes in the Ret)
- You use PayPeriod in either EmployeePayrollInfo or EmployeePayrollInfoMod due to the new OR with PayPeriod and PayrollScheduleRef

## Bugs Fixed in This Release

The following table lists the bug fixes by the SDK request.

SDK Request	Bug and nature of Fix
BillMod	QuickBooks business logic does not allow an Accounts Payable account to be specified as the account in ExpenseLine. Yet, when that account type was used in an ExpenseLine in a BillMod request in QuickBooks 2007, a misleading error message was returned: "Object with the ListID not found".  This has been changed so that the proper error message is returned indicating that the wrong account type is being used.
BillPaymentCheckAdd	If the CheckNumber field is supplied with data, and IsToBePrinted were set to True, the CheckNumber was cleared during the Add and didn't appear in QuickBooks.  The fix is to automatically and internally set IsToBePrinted to False if the CheckNumber is supplied.
ChargeAdd	When a statement charge was added with no due date supplied, the Charge was created with a due date anyway.  This has been fixed: If no due date is specified in the Add request, the Charge is created with no due date, just as you can do in the QuickBooks UI.
CheckMod	QuickBooks business logic does not allow an Accounts Payable account to be specified as the account in ExpenseLine. Yet, when that account type was used in an ExpenseLine in a CheckMod request in QuickBooks 2007, a misleading error message was returned: "Object with the ListID not found".  This has been changed so that the proper error message is returned indicating that the wrong account type is being used.
DataExtDefName	For custom field definitions, if an ampersand was used in the name, the ampersand did not display in QuickBooks and the letter after the ampersand was underlined.  The ampersand character now displays properly.
EmployeeQuery	The billing rate level for the employee was not returned.  Billing rate level now returned.
GeneralDetailReportQuery	The response xml for GeneralDetailReportQuery using qbxm1 4.0 should not include <ColType>LatestOrPriorState</ColType> but it does.  No longer returns that column type.

SDK Request	Bug and nature of Fix
InvoiceAdd	<p>In previous releases, if the InvoiceAdd request contained a ClassRef, that ClassRef was applied automatically to all the line items and you could not clear it.</p> <p>Now, you can clear the ClassRef to empty for a given line item simply by specifying an empty ClassRef for the line, like this: &lt;ClassRef&gt; &lt;/ClassRef&gt;.</p>
TimeTrackingAdd	<p>TimeTrackingAdd ignores the seconds if the Duration value contains them.</p> <p>In the QuickBooks UI, if the user enters time value with seconds, those are rounded to the nearest 30 second value. The TimeTrackingAdd request has been fixed to behave in the same way if Duration contains seconds.</p>
TimeTrackingAdd	<p>Adding a new time tracking record for an employee that has a default workers comp code should cause that code to be used and show up in QuickBooks. However, the workers comp code was being left blank after the Add.</p> <p>The workers comp code now shows up as expected in QuickBooks after the Add.</p>
TxnDisplayMod	<p>In certain instances, such as the payment having cleared, for the TxnDisplayModTypes BillPaymentCheck and BillPaymentCreditCard, you get a StatusCode error of 3300, "Could not open the requested BillPaymentCheck [or BillPaymentCreditCard] form or window."</p> <p>The form for the transaction is now displayed.</p>

## Known Bugs and Workarounds

The following table documents known behavior quirks as well as known issues and any workarounds for them.

Issue	Workaround
In the sample \samples\qbdt\cpp\qbxml\hostquery, you may get a build failure when you try to build the sample, due to a problem with the Interop.QbxmlLRP2 reference.	If you get this error, simply go to the project properties, click on the .Net tab and remove the reference to Interop.QBXMLRP2. Re-add the reference to it and rebuild the hostquery sample. It should build properly.
If you use qbXML rather than QBFC, notice that the new 7.0 request AccountTaxLineInfoQuery does not work if issued in the following XML format: <pre>&lt;AccountTaxLineInfoQueryRq&gt; &lt;/AccountTaxLineInfoQueryRq&gt;</pre>	<p>Use this format instead:</p> <pre>&lt;AccountTaxLineInfoQueryRq /&gt;</pre> <p>QBFC7 does use the above format, so you won't need to worry about this issue if you use QBFC.</p>
In the SDK 7.0 beta, CheckRet did not show the LinkToTxn aggregate, which is returned as part of the support for linking checks to certain transactions.	This has been fixed in the final 7.0 qbXML spec, but notice that this whole feature won't be implemented fully until the R3 patch to QB2008.

Issue	Workaround
<p>A CustomerQuery may contain different results (sort order) when run against QB 2008 and greater than the same query running against QB 2007 and earlier. This difference in sort order may be observed if you use MaxReturned set to a numeric value or if the query response contains the ampersand character &amp; or apostrophe ` in the &lt;name&gt; field.</p>	
<p>In the Microsoft Vista OS, the path c:\documents and settings\all users\ used in Windows XP is translated to the path c:\users\public\. If a company file in QuickBooks is opened on Vista with the path "c:\documents and settings\all users..." and that filename is also specified with the same path in an SDK integrated application, the SDK response says that QuickBooks is already open with a different file. As per the following: "-2147220470 A QuickBooks company data file is already open and it is different from the one requested."</p>	
<p>Developers may be accustomed to using the common file open dialog to allow the user to browse to a file (for example, the select a company file dialog in SDKTestPlus3.exe)</p> <p>Unfortunately, Microsoft changed the behavior of this dialog in Vista so it actually attempts to OPEN the file before returning control to the app that called it.</p> <p>The result is that if QB has the file open (or, more accurately, the QB database server has the file open) you get an error from the dialog that the file is locked and you cannot use it.</p>	<p>Here is how to handle this:</p> <ol style="list-style-type: none"> <li>1. In the application's first connection do a BeginSession and invoke GetCurrentFilename and save it away for future use, or display to the user, or whatever.</li> <li>2. In all subsequent connections invoke BeginSession using that stored company file name. If the application gets an error that it cannot open the file, invoke BeginSession again, invoke GetCurrentFilename, compare against the stored file name and ask user about it if they don't match.</li> </ol>
<p>During installation of QB SDK on a system without QuickBooks installed you may encounter this error during the execution of dotnetfxSp1.exe:</p> <p>"The upgrade patch cannot be installed by the Windows Installer service because the program to be upgraded may be missing, or the upgrade patch may update a different version of the program. Verify that the program to be upgraded exists on your computer and that you have the correct upgrade patch."</p>	<p>To solve this, install .NET from the Microsoft web site and retry the installation.</p>
<p>During SDK installation, you may see a message informing you that the UI and eBay sample could not be installed.</p>	<p>You can safely ignore and dismiss this message as it has no effect and the installation will proceed successfully.</p>
<p>In a VehicleMileageQuery, if you specify time values (for example, 2002-06-05T10:21:10) in any of the date range filters, you get a status code error 3020 statusSeverity="Error" statusMessage="There was an error when converting the date value..."</p>	<p>The reason for this is that Vehicle Mileage supports only Date values, not DateTime values, despite what the OSR says. The workaround is to use only date values, as follows: 2002-06-05.</p>

Issue	Workaround
If you use DeliveryPolicy in both a DataEventSubscription and a UIEventSubscription, you could set one to DeliverAlways and the other to DeliverOnlyIfRunning. In that case, QB will cache your application's COM pointer if the first event for this application in a company file session is associated with the DeliverAlways policy.	
If a user installs a copy of Convertible QuickBooks 2006 or greater but does not select one of the available editions (Premier, Accountant, Contractor edition, etc), and an SDK application is subsequently started, QuickBooks will prompt the user to select an edition. The application's call to BeginSession will fail while QuickBooks is being configured for the selected edition.	The workaround is to have the user finish the process of selecting the desired edition and then restart the SDK application.
QuickBooks Canada does not currently return values stored in the Company Data Extension fields. The bug affects QuickBooks Canada versions 2004 through 2007 and may affect QuickBooks UK versions 2004 through 2006.	
The order of some columns in reports may be different in QuickBooks 2008 than they were for older versions of QuickBooks.	This is not a bug, just a heads-up: the SDK documentation has always warned about assuming any column order.
QuickBooks caches the latest Refnumber for each transaction type. If you try to save a transaction using the default Refnumber from the UI, the UI will warn you if someone else already saved transaction with the same refnumber and give you the opportunity to change it to the new latest Refnumber. In the SDK, it simply gets used and you wind up with two transactions with the same refnumber	
In QuickBooks Simple Start edition, it is possible for an SDK application to create a subitem for a given item. It is not possible to do this in the UI, because the UI for creating items does not allow a subitem to be specified. You should avoid doing this in your application when running against Simple Start.	
If QuickBooks Verify is running and an SDK application issues a request, the request will not complete until the verify finishes.	
If QuickBooks 2007 and later is running non hosted, SDK applications starting QuickBooks in DoNotCare mode will open QuickBooks in single-user mode.	

## What's New in QBWC Web Connector 2.0

The following improvements have been made to QBWC 2.0:

- Support for interactive mode:
  - > Protocol Handler for Internet Explorer that allows web-based applications to interact directly with the web connector.
  - > Three new optional web methods to facilitate Interactive mode:
    - InteractiveURL
    - InteractiveRejected
    - isInteractiveDone
- Masterkeys are now handled and maintained automatically by .NET managed password storage mechanism.
- Update locking mechanism to help manage company file during simultaneous updates from multiple web connector clients.
- Included VERBOSE mode for logging level. With this, we now have three log levels: NONE = No logging, DEBUG (default setting) = Logging + first 50 characters of request/response xml, VERBOSE = Logging + complete request/response xml
- Added a response value of an O: (stands for Okay)  
O:<QBWC\_Version\_Supported\_By\_Server> for clientVersion(). It provides an update path for user if server's QBWCVersion is greater than user's QBWCVersion
- NoOp for sendRequestXML(). When sendRequestXML() call receives an empty string, QBWC calls getLastError(). If a NOOP is sent back from web-service for the getLastError(), QBWC will pause update for 5 seconds. This allows a web-service to tell QBWC to wait five seconds before calling sendRequestXML() again.
- New webmethod getServerVersion() provides a way for web-service to notify QBWC of it's version. This version string shows up in the More Information pop-up dialog in QBWC.
- Notification (system tray pop up) is now turned off by default.
- A new optional QWC parameter <CertURL> to provide means to provide certificate server for ssl certificates other than web server.
- A new optional QWC parameter <Notify> introduced. Value of true will enable notification (pop up at systray) at app level. Anything else will disable notification.
- - A new optional QWC parameter <AppDisplayName> is introduced. If available, QBWC will use this to display name in the QBWC UI. Otherwise, use <AppName> as usual. This is just for UI purpose. Update process still uses the <AppName> (or, AppUniqueName if provided)
- A new optional parameter <AppUniqueName> is introduced. If this element is available in QWC file, QBWC will not go into it's typical clone/replace mode for AppName and directly use the replace routine.
- There are new optional QWC file parameters for three rp.AuthPreferences parameters IsReadOnly (true/false), UnattendedModePref (umpRequired/umpOptional), and PersonalDataPref(pdpNotNeeded/pdpOptional/pdpRequired).
- Improved performance due to code refactoring.
- Improved error messages with suggestions on actions where applicable.

## New or Modified Files of Interest

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This release includes documentation, tools, and samples. The following files and directories may be of particular interest to you:

- This release includes .NET Primary Interop Assemblies (PIAs) for QBXMLRP2, QBFC7, QBFC6, QBFC5, QBFC4, QBFC3, and QBFC2.1. These assemblies are included in the redistributable installers and merge modules for each library. If you have previously built a local interop assembly for use with your .NET integrations, please be sure to update them to use the primary interop assemblies included with this release instead.
- *doc\qbxmlrps70.xml and doc\qbxmlso70.xml*  
The sample files containing all qbXML requests/responses, and their SignonMsgs requests and responses.
- *OSR\OnscreenRef*  
The Onscreen Reference for the SDK.

All samples require the QBXMLRP2 Request Processor, QuickBooks, and the QuickBooks sample product-based company file. Samples new in this release may require the latest QuickBooks version (currently QuickBooks 2008). The QBXMLRP2 Request Processor is installed automatically by QuickBooks 2008. The SDK also installs the request processor.

## Installation Instructions

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### **IMPORTANT**

During SDK installation, if the eBay SDK has previously been installed on your system, the SDK installer may report a failure registering ebay.SDK.tlb. This error can safely be ignored and the installation will proceed normally.

To install the SDK using the installer, execute *QBSDK70.exe*. The installer also adds a menu (*Start>Programs>QuickBooks SDK 7.0>*) that provides convenient access to SDK tools, samples, and documentation (including the *Onscreen Reference*). You can also access the qbXML Validator and qbXML Test applications through the "Send To" context menu for files.

## **Installing on a System that Doesn't Have QuickBooks**

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During installation of QB SDK on a system without QuickBooks installed you may encounter this error during the execution of dotnetfxSp1.exe:

“The upgrade patch cannot be installed by the Windows Installer service because the program to be upgraded may be missing, or the upgrade patch may update a different version of the program. Verify that the program to be upgraded exists on your computer and that you have the correct upgrade patch.”



To solve this, install .NET from the Microsoft web site and retry the installation.

## Registering an Application for QuickBooks Online Edition

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Before an application can connect with QuickBooks Online Edition using the SDK, it must be registered with the Intuit Developer Network. To register your application and obtain an application ID, please follow the instructions in the *QuickBooks SDK Programmer's Guide* and visit <http://appreg.intuit.com> to register your application.

## Importing the Correct Library

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For Visual C++ applications (if you are not using the QBFC Library), you need to import the library named *qbxmlrp2.dll*, which is installed in *C:\Program Files\Common Files\Intuit\QuickBooks*. For Visual Basic applications, select Project > References from within your VB project. Find “QBXMLRP2 1.0 Type Library” in the list and check the box next to it, then click OK. If you don't find the entry in the list, you can browse to it.

## About Redistributing QBXMLRP2

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Previous to SDK 7.0, we recommended redistributing QBXMLRP2. Beginning with SDK 7.0, we recommend that you do NOT redistribute QBXMLRP2 *except* in the following two cases:

- Your application needs to support QuickBooks versions older than QB 2004.
- Your application runs against versions of QuickBooks older than QB 2005 but needs certain advanced features of the request processor, such as AuthFlags.

If either of these apply to your case, you can redistribute QBXMLRP2 by manually including the merge module QBXMLRP2.msm or QBXMLRP2PIA.msm (for .Net applications)

## Creating Applications that Can Run on 64-Bit Operating Systems

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If you want your SDK application to run on a 64-bit machine, and are using Visual Studio to develop it, you must have the compiler options set properly. In particular, you must set the Platform Target to x86.

This has caused some developers problems, because the default setting if you simply create a new project is “Any CPU”, which is a setting that has prevented some developer applications from running on 64-bit OS.

## Documentation

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A new and improved unified OSR is available: you'll want to check this out.

This release updates the QuickBooks Web Connector Programmer's Guide, which describes how to develop web services that work with the QuickBooks web connector. The other documents are updated versions of previous documents: the QB SDK Programmer's Guide is a comprehensive treatment of QB SDK programming, and the Technical Overview provides a high level overview of the functionality provided in SDK. All documents are available in both PDF and HTML. Along with the other major features in the SDK, the manuals and the *Onscreen Reference* can be conveniently accessed through the Start menu.

The QBMS documentation has been removed because it is now installed in the separate QBMS SDK.

## Tools

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A new and improved unified OSR is available: you'll want to check this out.

The **qbXML Validator** tool contains new functionality that allows you to verify qbXML requests that correspond to these combinations:

- qbXML 7., 6.0, 5.0, 4.1, 4.0, 3.0, 2.1, 2.0, 1.1, 1.0 for U.S. editions of QuickBooks
- qbXML 7.0, 6.0, 5.0, 4.1, 4.0, 3.0, 2.1, and 2.0 for QuickBooks Online Edition
- qbmsXML 1.0 for QuickBooks Merchant Service
- qbXML CA3.0 and CA2.0 for Canadian editions of QuickBooks
- - qbXML UK3.0 and UK2.0 for UK editions of QuickBooks

The Validator is installed automatically as part of the SDK installation.

The file *tools\SDKTest\SDKTestPlus3.exe* is an enhanced version of SDKTest that uses QBXMLRP2 and allows the user to control every aspect of the connection to QuickBooks and can be used to send XML request files to QuickBooks. It supports sending subscription request XML as well as data integration XML. The source code for this tool is in *samples\qbdt\vb\qbxml\SDKTestPlus3*.

The file *tools\SubscriptionManager\SubView.exe* is a tool for viewing and removing application subscriptions from QuickBooks.

## Samples

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The Samples directory contains a *readme.html* (which can be accessed from *Start > Programs > QuickBooks SDK X.0 > Samples*). This file lists each sample and provides links to open the project directory, the project itself, and the executable form of the application.

The SDK installer verifies that the MSXML4.0SP2 or greater API from Microsoft is installed on your system. If MSXML is not present, the SDK installer will install it for you. This API is used by the SDK's Validator tool and several samples.

Some samples require .NET 2.0. This can be downloaded from the Microsoft website.

## Downloading MSXML 6.0

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If you want to run the sample applications on a system that does not have MSXML installed (for example, if you want to use Remote Data Sharing from a system that does not have the SDK installed), you will need to install MSXML. In addition, if your application is dependent on MSXML Core Services, you will need to redistribute that software in your installer. The MSXML Core Services software is available from [Microsoft](#)

## Building the C++ Samples

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The `#import "qbxmlrp2.dll"` statement in the C++ samples allows these applications to use the COM interface supported by the QuickBooks SDK. This statement will cause an error when you are building the samples in Microsoft Visual Studio if the Include path is not set to include the location of this DLL. The DLL is installed with QuickBooks and resides in the QuickBooks common directory, currently defined as

*C:\Program Files\Common Files\Intuit\QuickBooks*. Add this directory to the Include path by choosing the Tools menu, Options command, and the Directories tab in Visual Studio.

## UIandEventTest Samples

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In order to build the EventHandler C++ sample, you will need to specify the QuickBooks executable path for the sample project. The method for doing this is different for Visual Studio 6.0 and Visual Studio .NET.

For Visual Studio 6.0, select "Options" from the "Tools" menu. Select the "Directories" tab and then select "Executable Files". Add the QuickBooks executable path to the list of directories here.

For Visual Studio .NET, select "Properties" from the "Project" menu. Under the "C/C++" options, select "General" and add the QuickBooks executable path to the "Additional Include Directories". Under the "MIDL" options, also select "General" and add the QB path to "Additional Include Directories".

All of these C++ samples also use *QBXMLRP2.DLL* in the QuickBooks "common" directory. The project files currently specify this path as *C:\Program Files\Common Files\Intuit\QuickBooks*. If this path is different on your machine, you will need to change it in the project files.

## Known Problems in VB Sample Applications

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The Visual Basic sample applications allow you to view a response from QuickBooks. If you try to view a response that is greater than 32K, you will receive an "Out of memory" error. This happens because the VB sample applications use a TextBox control, which has a 32K limit, rather than a RichTextBox control. In a Windows 98 or Windows Me environment, this can corrupt memory, and the application might not terminate properly.

There is a known issue (not related to qbXML) with the AddReceivePayment sample application. The MS Visual Studio application must be installed before you can run AddReceivePayment, or you will receive the following error message when you run the application: “Class not registered. You need the following file to be installed on your machine. MSSTDFMT.DLL.”

## Using Payroll Reports

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If your application is accessing a company file that is currently signed up for a subscription to a payroll service, you can generate payroll reports and query PayrollNonWageItems.

To test this feature, you can use one of Intuit’s sample company files (even though it will not be signed up for a subscription to a payroll service). Please be aware that QuickBooks will record an artificial creation date to any test data that you add to a sample company file.

## Deprecation Policy

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You may notice that some items in the OSR are marked as deprecated. Deprecated items supported for the release in which they are deprecated, in the next major release they will be removed from the spec and their functionality will not be available.

## System Requirements

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The system requirements for the QuickBooks SDK are the same as those for the version of QuickBooks that is running. QuickBooks 2008 and 2007 will run on Microsoft Windows 2000, Windows XP, and Windows Vista.

QuickBooks 2006 will run on Windows 2000 and Windows XP.

QuickBooks 2005 and 2004 will run on Microsoft Windows 98, 2000, Me, or XP operating systems.

QuickBooks 2002 and 2003 will run on Windows NT, 98, 2000, Me, or XP operating systems. (The SDK does not run in unattended mode—that is, with automatic login—on Windows 98, First Edition; it does run in unattended mode on Windows 98 Second Edition on QuickBooks 2005 and earlier.)

## QuickBooks Products and qbXML/QBFC Support

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The following table of QuickBooks versions and supported qbXML and QBFC versions takes precedence over any other such tables in QB SDK documentation.

The following table lists the different versions of QuickBooks and the corresponding versions of the qbXML specifications that support them. *Note:* QuickBooks Mac, QuickBooks Basic, UK Simple Start edition, UK regular editions, and the Canadian QuickBooks Easy Start Edition do not support the SDK. (For UK, use QuickBooks Pro and QuickBooks Accountant.)

<b>Version of QuickBooks</b>	<b>qbXML Specification Version</b>
<b>QuickBooks 2008 and Enterprise 8.0 (Using QBXMLRP2)</b>	<b>7.0, 6.0, 5.0, 4.1 4.0, 3.0, 2.1, 2.0, 1.1, 1.0</b>
QuickBooks 2007 and Enterprise 7.0 (Using QBXMLRP2)	6.0, 5.0, 4.1 4.0, 3.0, 2.1, 2.0, 1.1, 1.0
QuickBooks 2006 and Enterprise 6.0 (Using QBXMLRP2)	5.0, 4.1 4.0, 3.0, 2.1, 2.0, 1.1, 1.0
QuickBooks 2005 and Enterprise 5.0 (R5 and later) (using QBXMLRP2)	4.1, 4.0, 3.0, 2.1, 2.0, 1.1, 1.0
QuickBooks 2005 (and Enterprise 5.0) (using QBXMLRP2)	4.0, 3.0, 2.1, 2.0, 1.1, 1.0
QuickBooks 2004 (and Enterprise 4.0) (using QBXMLRP2)	3.0, 2.1, 2.0, 1.1, 1.0
QuickBooks 2003, Enterprise 3.0* (R7 and above) and all later versions of QuickBooks using QBXMLRP	2.1, 2.0, 1.1, 1.0
QuickBooks 2003 (and Enterprise 2.0)*	2.0, 1.1, 1.0
QuickBooks 2002 (R2 and above) (and Enterprise)*	1.1, 1.0
QuickBooks 2002 (R1)*	1.0
<b>QuickBooks Online Edition</b>	<b>7.0, 6.0, 5.0, 4.1, 4.0, 3.0, 2.1, 2.0</b>
<b>QuickBooks 2004-2007 Canadian (using QBXMLRP2)</b>	<b>CA3.0, CA2.0</b>
<b>QuickBooks 2004-2006 UK Editions (using QBXMLRP2)</b>	<b>UK3.0, UK2.0</b>
QuickBooks 2003, Canadian and UK Editions, CA2.0. UK2.0)* and all later versions of these through QuickBooks 2006	CA2.0. UK2.0
<i>*Earlier releases of QuickBooks will work with either version of the Request Processor (QBXMLRP2 or QBXMLRP). We recommend you upgrade existing applications to use QBXMLRP2. SDK 3.0 and greater features are available only with QBXMLRP2; in addition, this Request Processor solves some problems found in the older Request Processor.</i>	

The following table lists the different versions of the QuickBooks Foundation Class (QBFC) Library and the versions of the qbXML specification that support them.

<b>QBFC Library</b>	<b>qbXML Specification Version</b>
QBFC7 (including support for QuickBooks Online Edition)	7.0, 6.0, 5.0, 4.1, 4.0, 3.0, 2.1, 2.0, 1.1, 1.0 Does NOT support: CA3.0, CA2.0, UK3.0, UK2.0
QBFC6 (including support for QuickBooks Online Edition)	6.0, 5.0, 4.1, 4.0, 3.0, 2.1, 2.0, 1.1, 1.0 Does NOT support: CA3.0, CA2.0, UK3.0, UK2.0
QBFC5 (including support for QuickBooks Online Edition and Canadian Editions of QuickBooks)	5.0, 4.1, 4.0, 3.0, 2.1, 2.0, 1.1, 1.0, CA3.0, CA2.0, UK3.0, UK2.0
QBFC4 (including support for QuickBooks Online Edition and Canadian Editions of QuickBooks)	4.0, 3.0, 2.1, 2.0, 1.1, 1.0, CA3.0, CA2.0
QBFC3 (including support for QuickBooks Online Edition and Canadian Editions of QuickBooks)	3.0, 2.1, 2.0, 1.1, 1.0
QBFC2_1 (including support for QuickBooks Online Edition)	2.1, 2.0, 1.1, 1.0
QBFC2	2.0, 1.1, 1.0
QBFC2CA	CA2.0
QBFC	1.1, 1.0

## If You Have Questions . . .

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For IDN support, please visit <http://developer.intuit.com/support>.

For community support, visit <http://idnforums.intuit.com>.