How to make the QuickBooks Interface initialize in BidMagic

Before we get started, we need to go over a few requirements.

The four items listed need to be on the same computer.

The QB Interface service patch and Interface update need to be inside of your BidMagic folder.
(If you need to download these files, the links are enclosed in the check list.)

Check List	
BidMagic	
QuickBooks	On the Same computer
QB Interface Service Patch	
QuickBooks Interface Update	

Depending on your operating system, the BidMagic & QuickBooks file folders are located in the following directories.

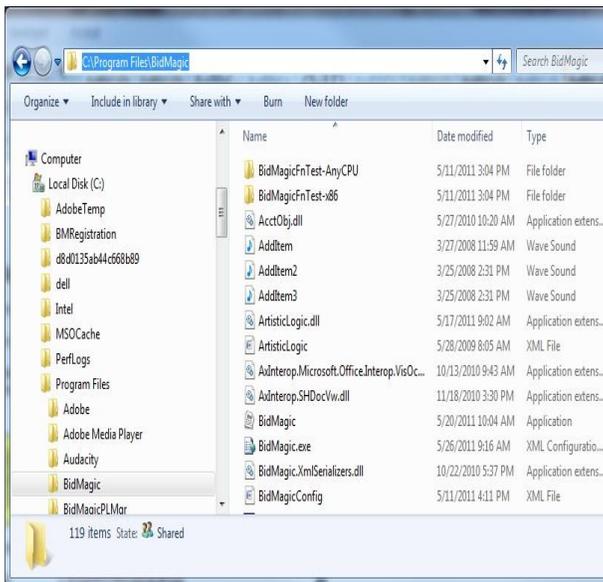C:\Program Files\BidMagic   Or   C:\Program Files(x86)\BidMagic

C:\Program Files\QuickBooks   C:\Program Files(x86)\QuickBooks
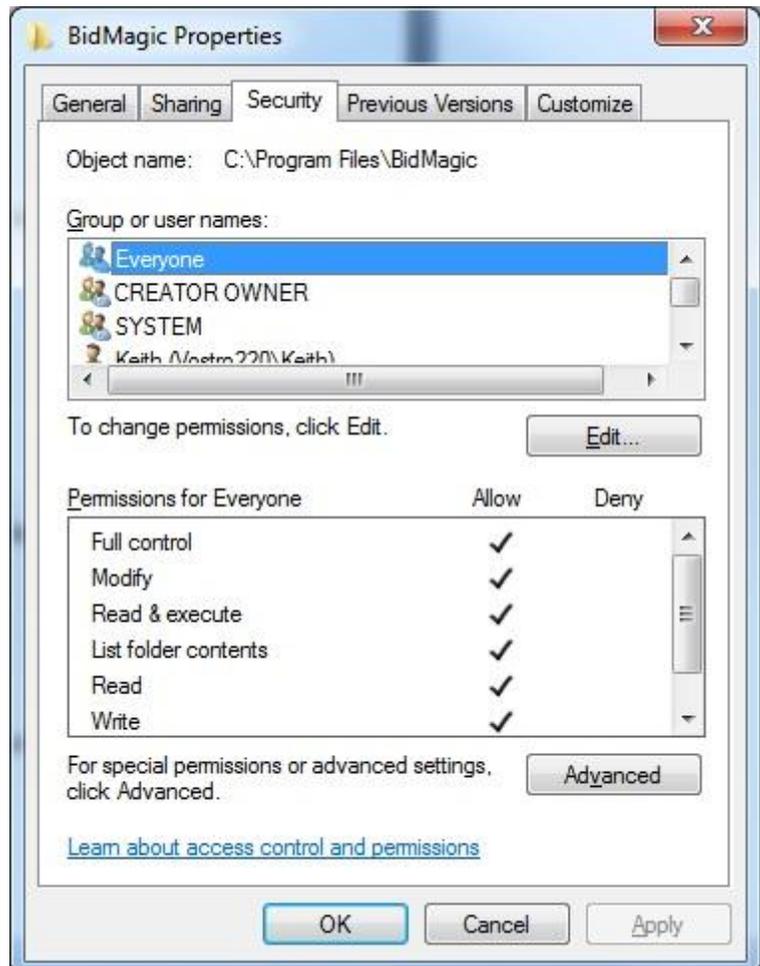
The next step addresses file permissions.

1) Inside of program files, go to BidMagic. Right Click on the BidMagic folder and view properties.

Select the security tab and then edit.

The items "Trusted Installer", "Users" and Administrators should be granted to

"Allow" Full Control, and then select add, and then add Everyone and also grant full control.
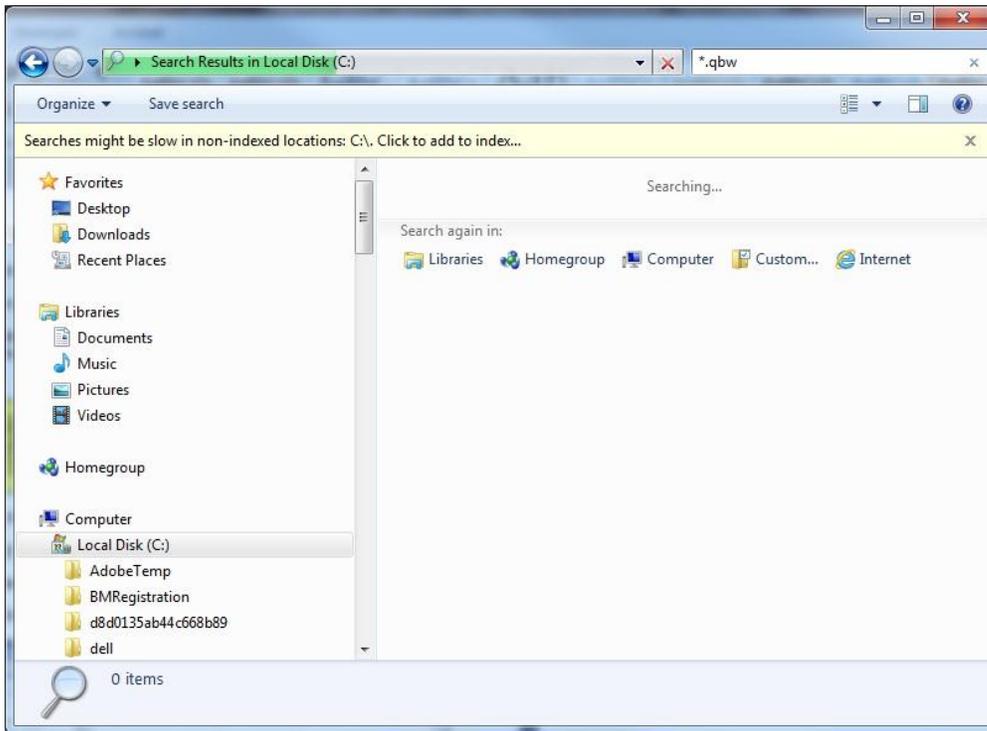
After select Apply and then OK and OK once more.

2) Next step is the same process for the Intuit directory within the program files.

3) Next locate you QuickBooks company file, typically it is located inside

C:\Users\Public\Documents\Intuit\Quickbooks\Company Files

The best way to find the QuickBooks company file is to search from the file manager, Select the C:\ drive, go to the search box and type *.QBW and press enter.
The search will locate your company file on the computer you currently are on.

After you've found the company file, make certain read-only is un-checked and on the security tab that Everyone is allowed full control.

(Make a note of the location, you'll need it later)

4) Return to the BidMagic folder with the program files and run the QB Interface Service Patch (after the download it will be called qbfc6_0installer.exe) and then QuickBooks Interface Update (after the download it will be called 2009_12_31_QBSync.exe)

5) Start QuickBooks and login as Administrator, and then start BidMagic.

6) Within BidMagic, initialize the interface, select "Send BidMagic Bid to QuickBooks Estimate."
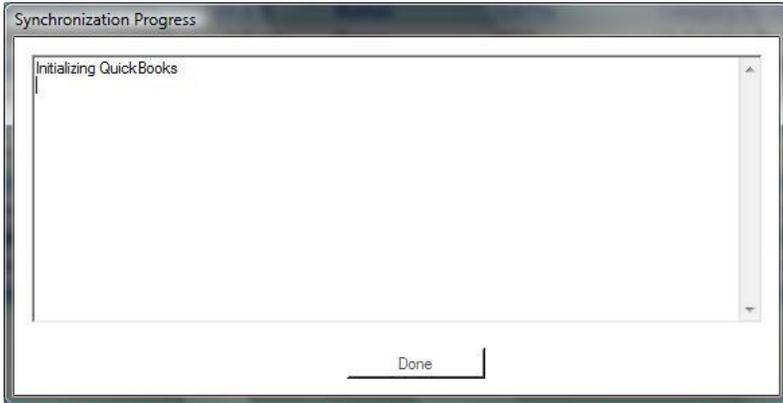
The first screen you will see will say "Initializing QuickBooks," followed by a warning informing you that it hasn't been able to establish a connection with QuickBooks. It's asking you at this point if you would like establish a QuickBooks Connection (we'll assume yes).
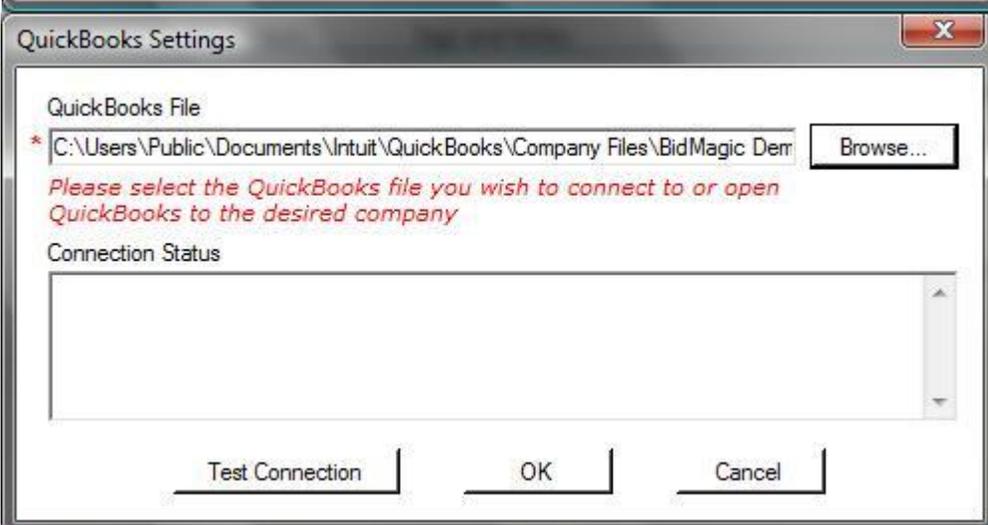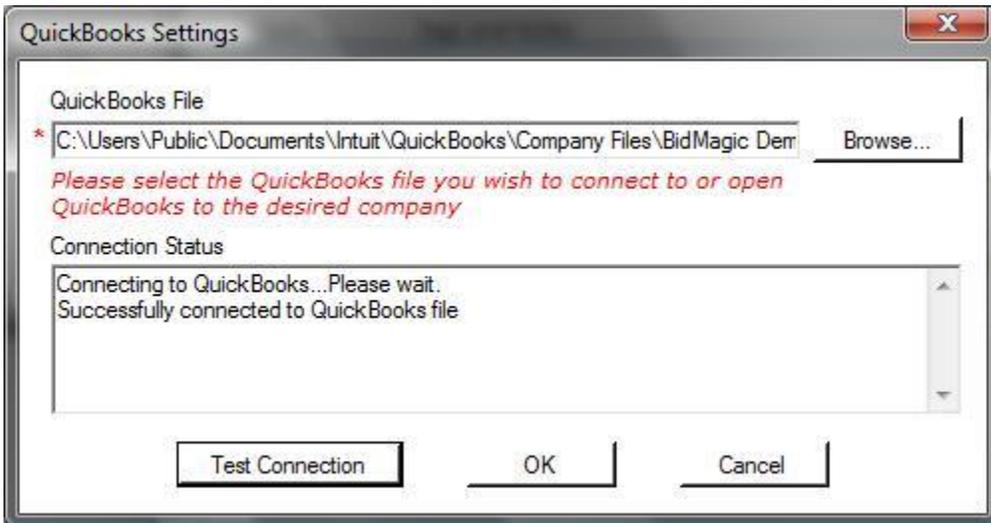

This will be followed by a configuration window asking where the QuickBooks company file is located.
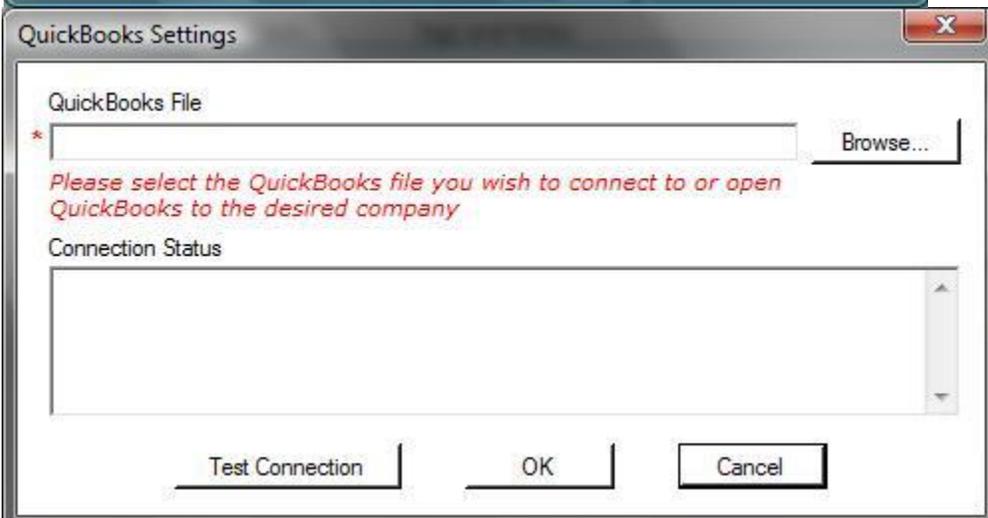

The location of the QuickBooks file must be entered into this field so BidMagic can easily talk to QuickBooks.

Next please select "Test Connection."

QuickBooks Settings

QuickBooks File

* C:\Users\Public\Documents\Intuit\QuickBooks\Company Files\BidMagic Dem   [Browse...]

Please select the QuickBooks file you wish to connect to or open QuickBooks to the desired company

Connection Status

Connecting to QuickBooks...Please wait.
Successfully connected to QuickBooks file

[Test Connection]   [OK]   [Cancel]

If you've followed the steps, you should be greeted with the message, "Successfully connected to QuickBooks file."

Synchronization Progress

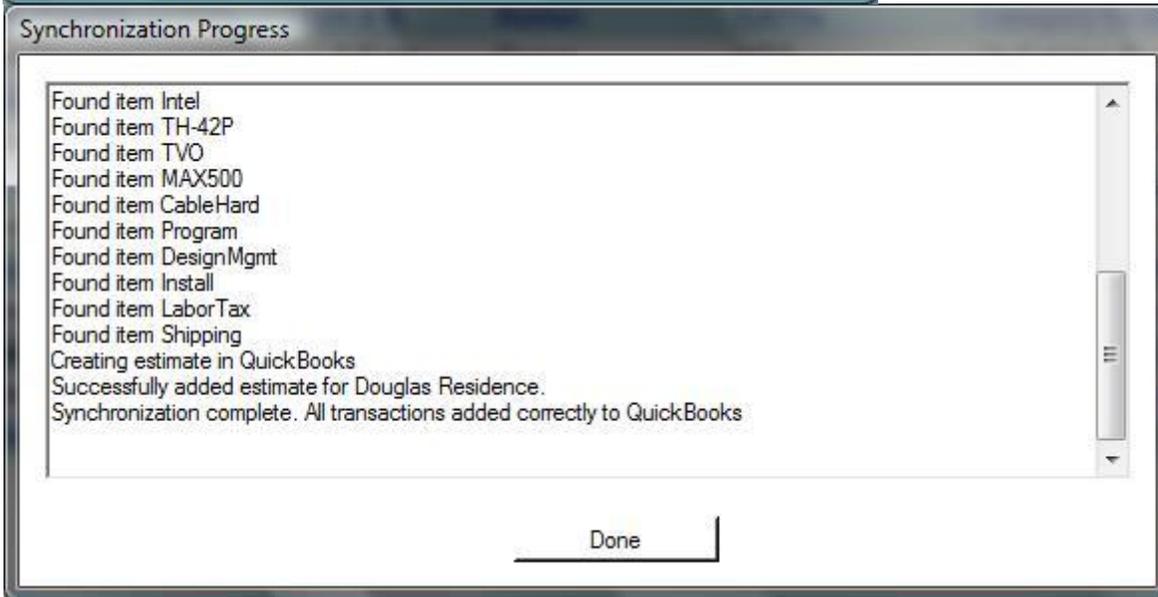Initializing QuickBooks
Initialization successful
About to add estimate to QuickBooks

[Done]
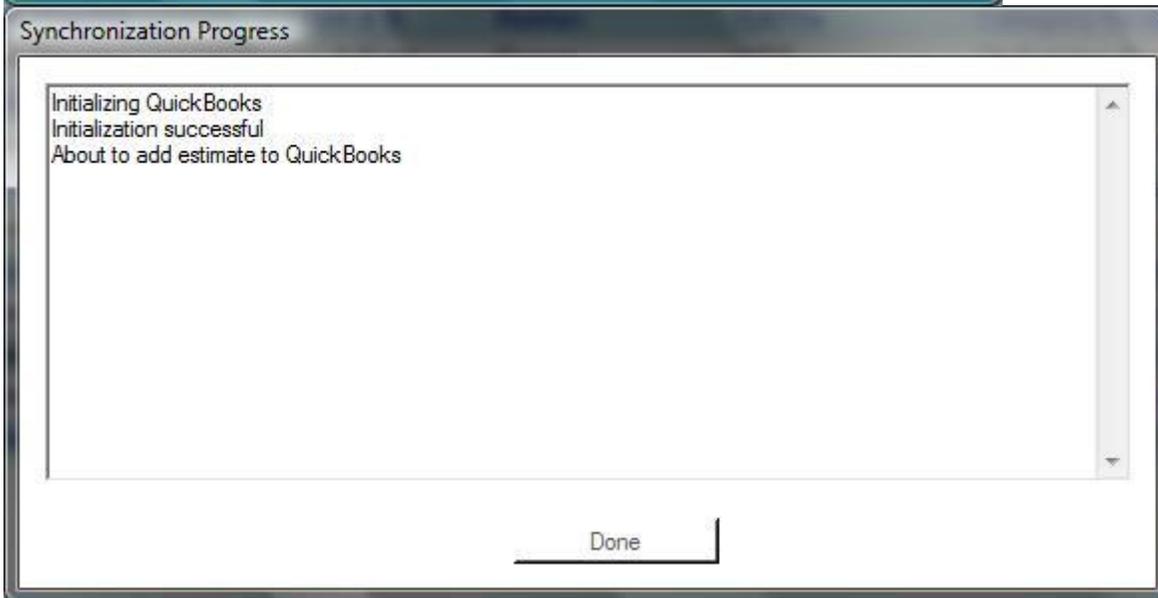
Followed by the Synchronization manager window informing you of BidMagic about to add an estimate to QuickBooks.

Sales Tax Details

Sales Tax Item Name

0.097500

Sales Tax Rate
9.75%

Tax Agency

[▼]

[OK]
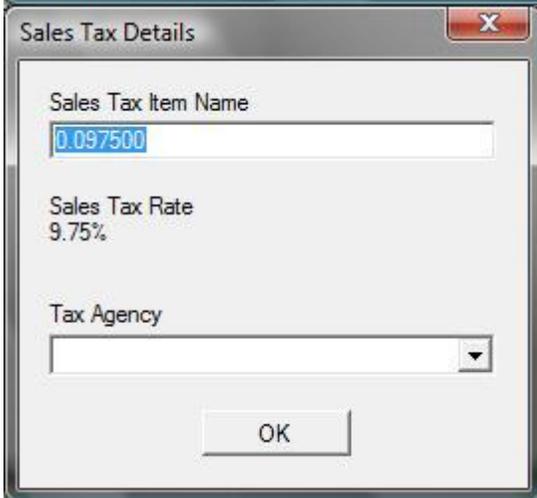
The next window will ask about your local sales tax and what agency you pay it to.

Immediately followed by the question, "Would you like to automatically update customer/vendor information."

The majority of companies would like this to be automatic.

Update Information

Would you like to automatically update customer/vendor information?

[Yes] [No]

Synchronization Progress

```
Found item Intel
Found item TH-42P
Found item TVO
Found item MAX500
Found item CableHard
Found item Program
Found item DesignMgmt
Found item Install
Found item LaborTax
Found item Shipping
Creating estimate in QuickBooks
Successfully added estimate for Douglas Residence.
Synchronization complete. All transactions added correctly to QuickBooks
```

[Done]

The final bit of information the interface will reply with is letting you know that Synchronization is complete, and all transactions have been added to QuickBooks.

To confirm this, go to QuickBooks, open Estimates and look for the last entry, it should be the estimate you just brought over.

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