

Installing the QuickBooks Interface driver

January 2012

To run the QuickBooks interface for FINPACK, you need to have both FINPACK and QuickBooks installed on the same computer. You will also need to install the QuickBooks driver that is included on the FINPACK CD. To install the driver, follow these directions.

1. Browse the FINPACK CD and open the QuickBooks folder.

Name	Date modified	Type	Size
Drivers	11/22/2011 9:55 AM	File folder	
FINPACK Input Forms	11/22/2011 9:55 AM	File folder	
Intl	11/22/2011 9:56 AM	File folder	
QuickBooks	11/22/2011 9:56 AM	File folder	
USCanada	11/22/2011 9:56 AM	File folder	
AUTORUN	11/16/2000 4:38 PM	Setup Information	1 KB
Conversion Instructions	10/9/2008 2:22 PM	Adobe Acrobat D...	185 KB
FP_Update	11/22/2011 9:33 AM	Application	29,724 KB
Installation and Getting Started	11/4/2011 4:24 PM	Adobe Acrobat D...	183 KB
Setup	7/31/2008 12:45 PM	Application	2,006 KB
setup	10/20/2010 11:38 ...	Configuration sett...	1 KB

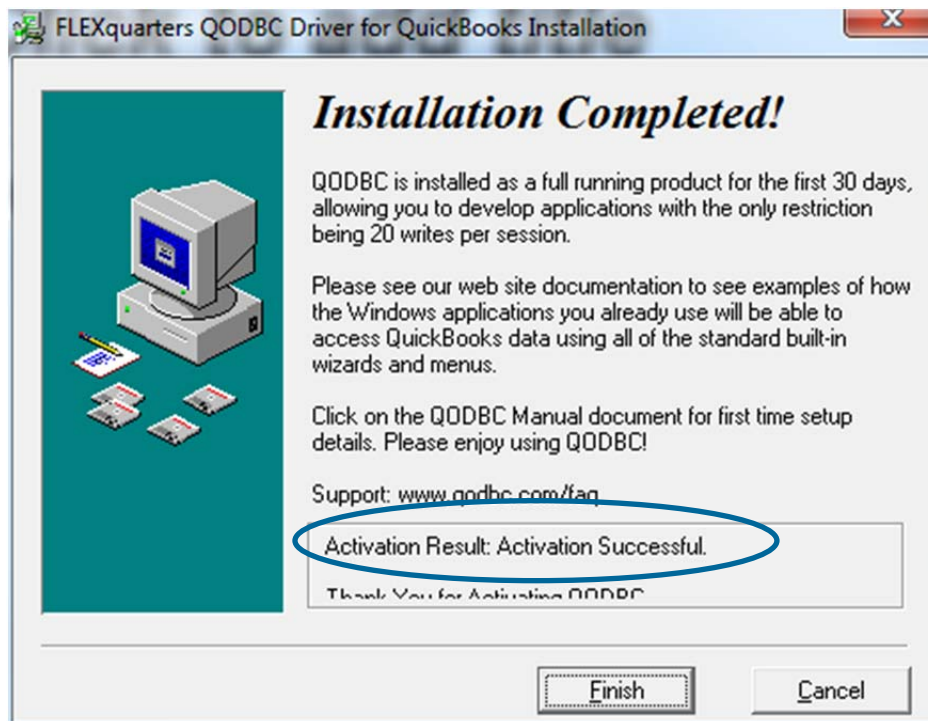
2. Inside this folder, find the application named **qodbc** and double-click on it to run the installation.

Name	Date modified	Type	Size
autoinst	7/21/2011 9:24 AM	Configuration sett...	1 KB
qodbc	10/25/2010 2:27 PM	Application	6,938 KB

3. Click through the first few screens where the installation starts and you select the QuickBooks region.
4. You will come to a screen prompting you to enter the Activation Key. This should be already filled in, but if not, contact CFFM. Once the activation key is entered, click the Next button.

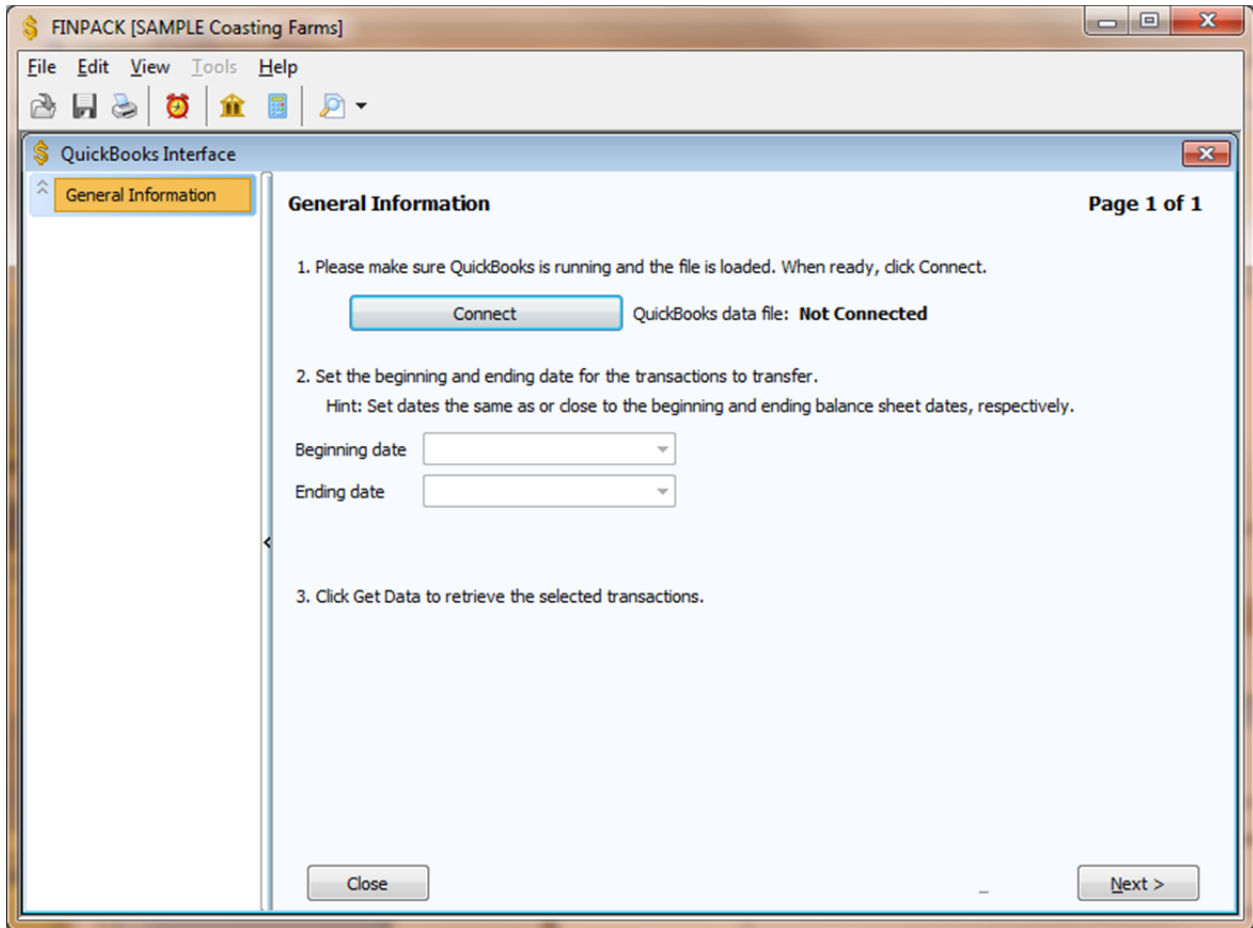


5. The next screens will prompt you for the destination location and to finally proceed with the installation.
6. If you are connected to the internet, the last step of the installation will activate the driver. If this activation step does not occur or if you are not connected to the internet, please contact CFFM to complete this step manually.



Accessing a QuickBooks file for the first time

Within FINPACK, the first step to the QuickBooks Interface is to connect to the QuickBooks file. This is done on the following screen.



As indicated on this screen, QuickBooks must be open and the particular file loaded. When ready, click the Connect button.

The first time you connect to a QuickBooks file, the following dialog will be displayed in QuickBooks.



The highlighted question on the dialog above is significant. While the default selection is “No,” it must be set to “Yes” so that the FINPACK QuickBooks Interface can work. **Select “Yes” then click the Continue button.**

Another dialog (shown below) asks you to confirm this selection. Click the Done button to proceed.

