



Connecting People to Quickbooks

29th June 2017

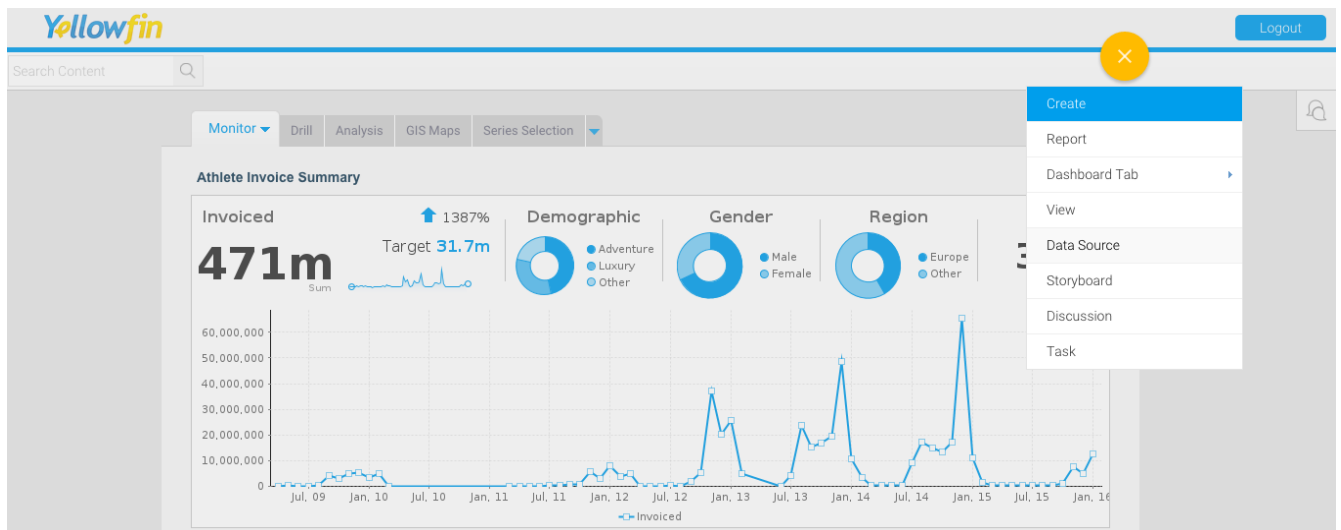
Yellowfin makes connecting to Quickbooks and sharing insights easy:

1. Install your connector
2. Connect to your account

Install your Connector

Add a New Data Source

- a) Log into your Yellowfin Server
(The user must have permissions to add a new Data Source)
- b) Click **Create** and select **Data Source**

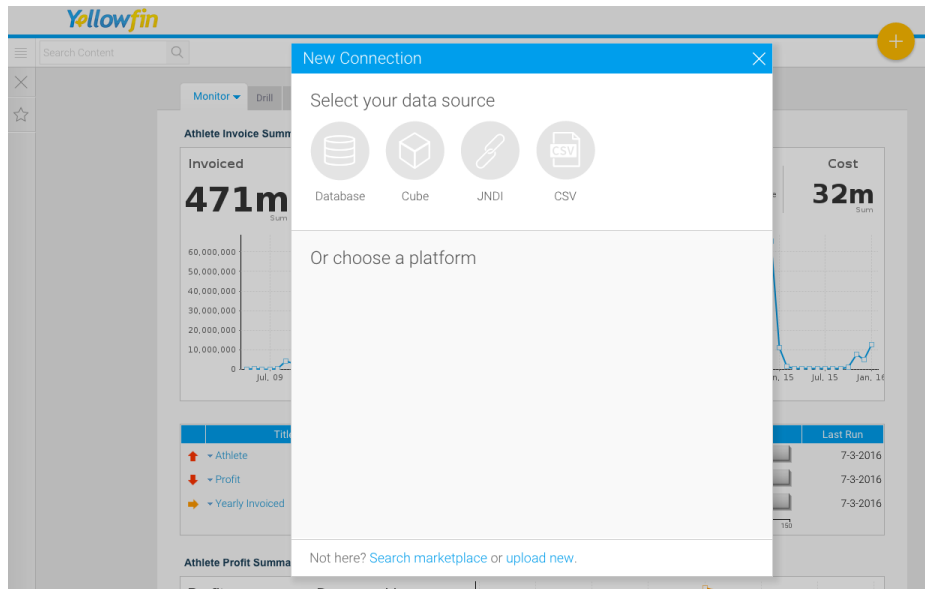


Upload new connector

If you can see the icon for the Quickbooks Connector at the **New Connection** step, then you can skip to **Connect to your Quickbooks account**. Otherwise you will need to select the **Not here?** link.

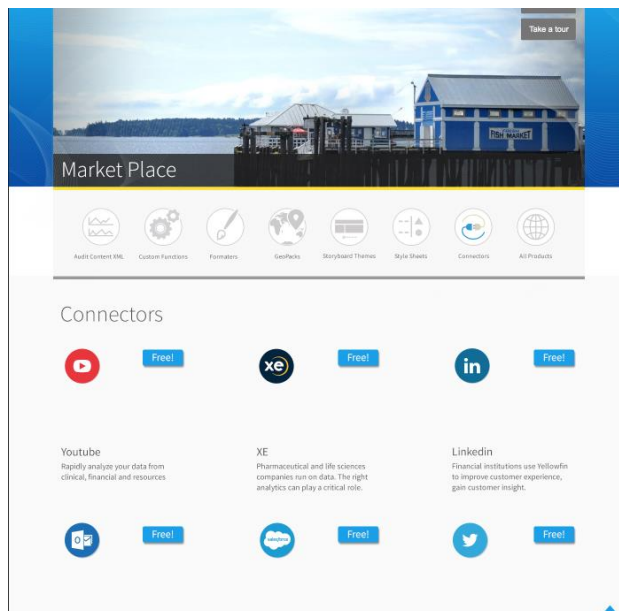
Search Marketplace - download your connector from the Yellowfin Marketplace

Upload New - upload your connector to your instance of Yellowfin



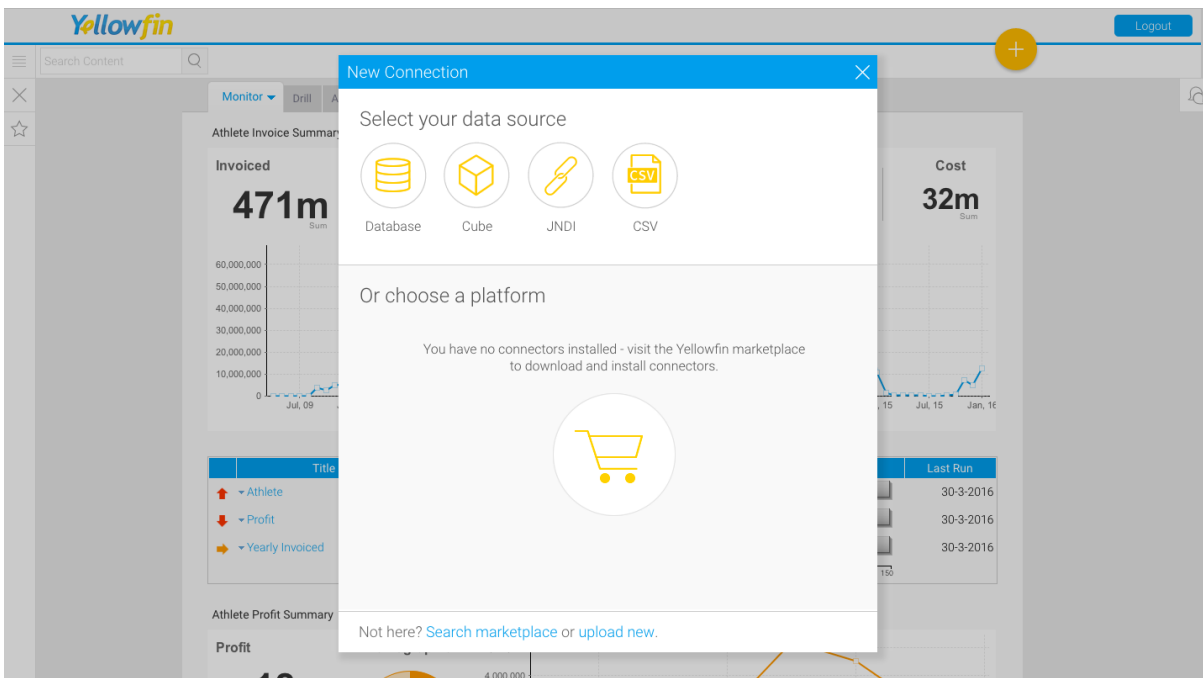
Download the connector from the Yellowfin Marketplace

- c) Go to the [Yellowfin Marketplace](#)
- d) Download the **Quickbooks Connector** (it's free!)



Upload your new Connector

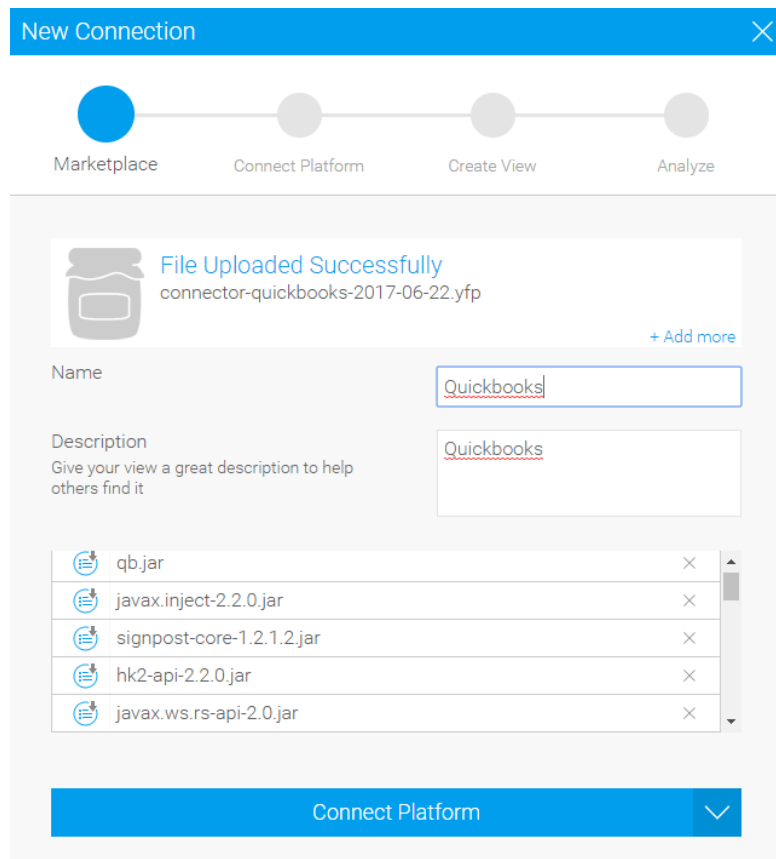
a) Click **Upload New**.



b) Give your connector a **name** and **description**.

c) Click **Connect Platform**.

Your connector will now be available under your **Data Source's** list.



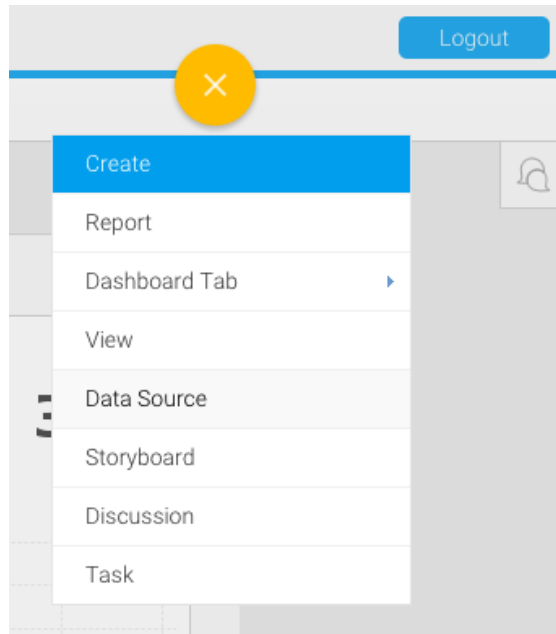
Connect to your Account

Once your Quickbooks Connector is installed, you can use it to connect to your Quickbooks account.

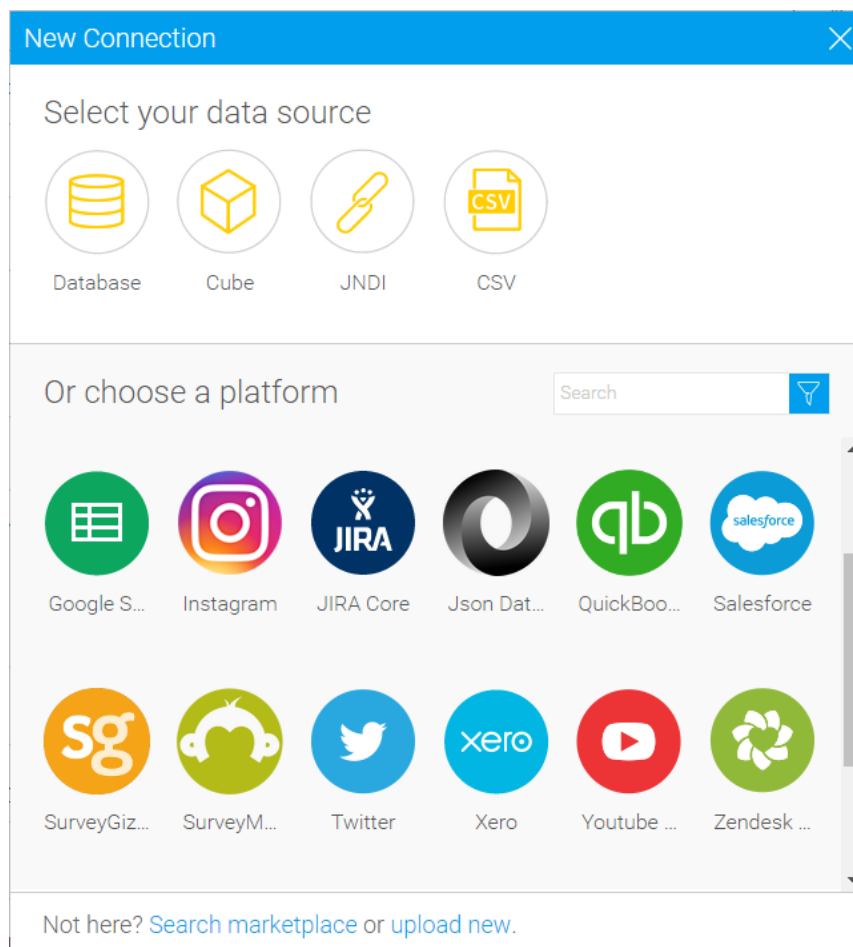
Create a new Data Source

- a) Click **Create** and select **Data Source**.

(If you have just installed your connector, then you will be immediately taken to the next step)



- b) Select **Quickbooks**



Name your Connection and Enter your Account Details

- c) Give your connector a **name** and **description**.
- d) Press 'Request Oauth Verifier' to get redirected to the Quickbooks website. Log in with your account. After that you should get the Oauth Verifier and Realm Id.
- e) Paste your Oauth Verifier and Realm Id to their respective fields.
- f) Press 'Authorize' and you should see values appear in the 'Company Name', 'Access Token' and 'Token Secret' fields.
- g) Provide a 'Max Record' number to limit the amount of downloaded data.
- h) Click **Launch Pre-Built Content**

The screenshot shows a 'New Connection' window with a progress bar and several input fields and buttons for configuring a connection. The steps listed are: 1. Request Oauth Verifier, 2. Enter Oauth Verifier, 3. Enter Realm Id, 4. Authorize QuickBooks, 5. Company Name, 6. Access Token, 7. Token Secret, and 8. Max Record. There are also buttons for 'Load Video', 'Request Oauth Verifier', and 'Authorize', and a 'Launch Pre-Built Content' button at the bottom.

About Yellowfin

Yellowfin is a global Business Intelligence (BI) and analytics software vendor, passionate about making BI easy. Founded in 2003 in response to the complexity and costs associated with implementing and using traditional BI tools, Yellowfin is a highly intuitive 100 percent Web-based reporting and analytics solution. Yellowfin is a leader in mobile, collaborative and embedded BI, as well as Location Intelligence and data visualization.

Over 10,000 organizations, and more than 2 million end-users across 70 different countries, use Yellowfin every day. For more information, visit www.yellowfinbi.com

Additional Resources

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