

## **BusinessWise Training, Inc.**

**"Power up Your QuickBooks with QBClips"**

[www.qbclips.com](http://www.qbclips.com)

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### **Setting up QBClips**

*Prior to completing the following instructions complete QBClips QuickBooks Setup Instructions*

#### **Section I:** Sign up for QBClips:

1. Go to QBClips website [www.qbclips.com](http://www.qbclips.com)
2. Click on tab, "Sign Up for QBClips"
3. Enter the requested information Note: the "username" should not be any of your salon ID's.
4. Click the signup button.
5. If everything is entered correctly, you will have successfully created an account. If not, correct the errors. Then press the signup button again.
6. The day you signed up to use QBClips is your start date. If you want a start date other than the date you signed up, let us know. (QBClips can, conceivably, go back three years for a start date).

#### **Section II.** Adding salons to your account:

1. Login to your account by going to [www.qbclips.com](http://www.qbclips.com) and click on "Salon Management" button. Enter your username and password which you created in Section I.
2. Click on the "Tools" button.
3. Click on the "Add a new salon to your account" link.
4. Enter your salon number and the Salondata password for this salon. Note: This must be a valid password to a currently active salon in Salondata. The QBClips server will validate your salon id and password with Salondata.
5. Finish selecting your preferences:
  - a. Which group would you like? – Select the 'Default' group unless you have more than one QuickBooks company file then you are able to add additional groups. (Call QBClips' Customer Service for assistance)
  - b. Download Sales Receipts – This will download a sales receipt for cash and credit cards into your QuickBooks.
  - c. Download Payroll – This will download hours worked and other payroll information into QuickBooks.
  - d. Credit Card Breakout Mode – Select Daily unless you receive American Express then you should select Weekly.
6. Click "Add Salon"
7. Repeat steps 1 through 6 for each of your salons.

### **Section III. Download Web Connector**

1. Click on the following link: <http://qbclips.com/files/QBWebConnectorInstaller1.5.1.exe>
2. Keep clicking on Run.
3. Click on Install to finish.

*If the web connector fails to install, contact BusinessWise Training, Inc/QBClips Customer Support.*

### **Section IV. Install QWC file for QBClips**

1. Login to your account by going to [www.qbclips.com](http://www.qbclips.com) and click on “Salon Management” button. Enter your username and password which you created in Section I.
2. Click on the “Groups” tab.
3. Under the heading Options click on the “Download QWC File” button.
4. Save this file to your desktop (remember the name).
5. Have your QuickBooks company file open. (Minimize all applications so you can see the desktop).
6. Double click on the attachment you just saved. It will have the same name as step 4. This will launch the Web Connector.
7. QuickBooks will launch a window titled Authorize New Web Service.
8. Click the OK button to authorize this service
9. QuickBooks will then launch a window titled QuickBooks – Application Certificate.
10. Click to choose one; preferably the Yes options - choosing Yes, Always..... is preferred (highly recommended), if you don't want to be prompted every time.
11. After making your choice, click the Continue button.
12. Verify the changes on the window that pops up and click Done.
13. You will be prompted to enter a password. Enter the password you chose when setting up your account from Section I above.
14. Click the OK button.
15. Click yes or no depending on whether or not you want to save the password.
16. The Web Connector screen will now be open and you will see a section for QBClips.

## Daily Use:

We recommend you download and reconcile your transactions on a daily basis.

Download your Salondata information:

- Open your QuickBooks company file.
- Click on File to pull down menu then click on “Update Web Services” or “Exchange Date with Web Services”
- Put a checkmark in the box to the left of QBClips application (enter password if not saved)
- Click on ‘Update Selected’
- Now your information is in QuickBooks!

