



F9 Technical Check List

for use with QuickBooks® Online

Hardware

- **Operating System:** Windows 7 through Windows 10, Server 2008 through Server 2019
- **Memory:** Minimum 4 GB
- **Processors:** Minimum dual core (recommended to support transactions and scalability)
- **Disk Space:** 300 MB (Including F9 Report Writer, F9 Integration Manager and PSQL components)

QuickBooks® Online Compatibility

The integration supports the following versions of QuickBooks® Online:

- QuickBooks® Online Simple Start (US) / Easy Start (Canada)
- QuickBooks® Online Essentials (US and Canada)
- QuickBooks® Online Plus (US and Canada)

Budget and **Classes** are **only** supported for QuickBooks® Online Plus (US and Canada)

QuickBooks® Online Accounts & Classes

F9 Integration Manager Online requires all companies to have **account numbers** (including inactive accounts) **associated with their Account Names**. If your system is only using descriptions, this will need to be changed before proceeding.

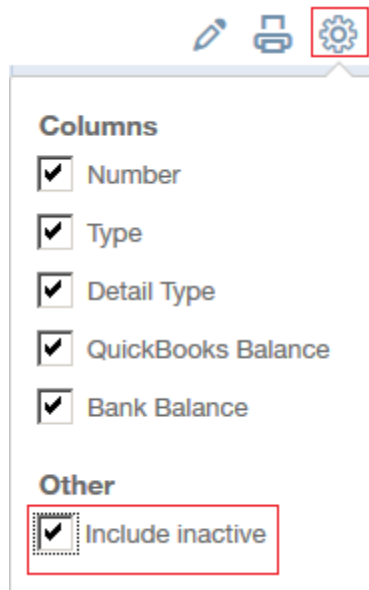
Account and Settings			
Company	Accounting	First month of fiscal year	January
Billing & Subscription		First month of income tax year	Same as fiscal year
Sales		Accounting method	Accrual
Expenses		Close the books	Off
Payments	Company type	Tax form	
Advanced	Chart of accounts	Enable account numbers	On
		Shipping account	Shipping Income
		Markup income account	40150 Construction Incom

To enable account numbers:

- Navigate to your company **Account and Settings**
- Select **Advanced** tab
- Turn **Chart of accounts /Enable account numbers** to **On**

To include inactive accounts:



- Navigate to your company **Lists**
- Select **All Lists**
- Select **Chart of Accounts**
- Click on the **Settings** icon and check **Other(include inactive)**



Note: Account numbers and Classes **should not contain** the following special F9 characters:

- '-' (dash)
- '.' (period)
- '*' (asterisk)
- '?' (question mark)
- ',' (comma)
- ';' (semicolon)
- '^' (caret)
- '(' (left parenthesis)
- ')' (right parenthesis)

Support for Classes

Classes		Run Report	New
← All Lists			
<input type="text" value="Filter by name"/>			
NAME ▲	ACTION		
New Construction	Run report ▼		
SubClass01	Run report ▼		
SubClass02	Run report ▼		
Overhead	Run report ▼		
Remodel	Run report ▼		

- **Classes:** length of Class Name must not exceed **30 characters**
(Example: **New Construction, SubClass01, Overhead...**)
- **Account & Classes:** Total max length of Accounts + max length Class Name and Subclasses (e.g. "Account+Class:Subclass:SubSubclass...") must not exceed **150 characters**
(Example: **10001+New Construction+SubClass01+SubClass02**)

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