



# F9 Technical Check List

for use with QuickBooks® Online

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## Hardware

- **Operating System:** Windows Vista through 10, Server 2008 through Server 2016
- **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.

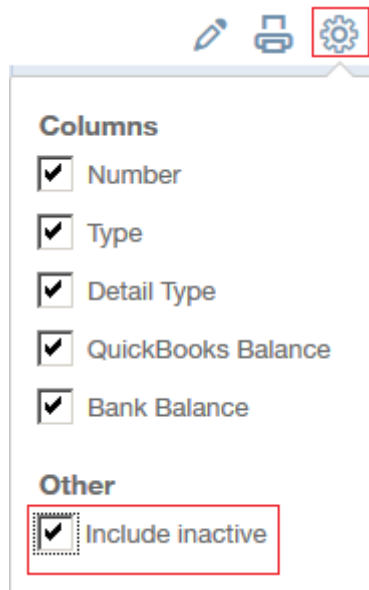
Account and Settings			
Company	<b>Accounting</b>	First month of fiscal year	January
Billing & Subscription		First month of income tax year	Same as fiscal year
Sales		Accounting method	Accrual
		Close the books	Off
Expenses	<b>Company type</b>	Tax form	
Payments			
Advanced		<b>Chart of accounts</b>	Enable account numbers
		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
<a href="#">← All Lists</a>			
<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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