Questions about QuickBase Sync?
We’ve got answers...
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About QuickBase Sync

What is QuickBase Sync?

QuickBase Sync is a new QuickBase integration feature that enables you to connect to other cloud apps and services with just a few clicks.

You can choose the fields you want to connect to your QuickBase app and automatically create a new table of connected data. You can refresh your connected data automatically, based on a schedule that you set. You can also refresh your connected data manually, any time you choose.

How can QuickBase Sync help my business?

Connecting other cloud services to your QuickBase app saves time, eliminates duplicate data entry, and provides insight across your business. With all your data in QuickBase, you have access to our advanced reporting, permission controls, workflow tracking, and easy customization.

You can build reports across all your data from within QuickBase. Add fields, create relationships, lookups, and summary fields, configure permissions, and use your connected data in workflows, reports, and home pages. The possibilities are endless!

For example, you might use connected tables to:

<table>
<thead>
<tr>
<th>Calculate project ROI</th>
<th>Connect QuickBooks Online <strong>Invoices &amp; Expenses</strong> and then relate to projects managed in QuickBase.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay the right people at the right time</td>
<td>Connect QBO <strong>Invoices &amp; Payments</strong> and then relate to jobs managed in QuickBase.</td>
</tr>
<tr>
<td>Track programs &amp; campaigns more efficiently</td>
<td>Connect Salesforce <strong>Accounts</strong> and then relate to partner programs managed in QuickBase. Connect Salesforce <strong>Contacts</strong> and then relate to marketing programs managed in QuickBase.</td>
</tr>
<tr>
<td>Gain visibility into project pipelines</td>
<td>Connect Salesforce <strong>Opportunities</strong> and then start onboarding projects in QuickBase.</td>
</tr>
<tr>
<td>Track detailed customer interactions</td>
<td>Connect Zendesk <strong>Tickets</strong> and then relate to customer projects managed in QuickBase.</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>---------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Gain a holistic customer view        | Connect QuickBooks Online **Invoices & Payments** and then relate to customers or projects managed in QuickBase.  
                                       | Connect Salesforce **Accounts & Cases** and then relate to technical sales campaigns managed in QuickBase. |
| Proactively address customer payment issues | Connect Zuora **Payments** and then relate to customers managed in QuickBase. |

**What data services can I connect to?**

Currently, you can connect to the following services:

- Bill.com
- Intacct
- NetSuite
- QuickBooks
- Salesforce
- Zendesk
- Zuora

Don’t see the service you’re looking for? Please let us know. We continue to evaluate support for additional services.

**How does it work?**

You give us a little info so QuickBase can access your data, and choose the fields you want to connect to your app. It’s that simple.

You can filter to connect only the records you care about and set a schedule to automatically refresh the data. Your connected data displays in a new **connected table** in your QuickBase app.

Data flows into **QuickBase** from the connected service. Currently, you can’t push data from QuickBase into another service.
Can I push data from QuickBase into other applications?
Two-way sync is not available with QuickBase Sync at this time.

Connecting to other cloud apps

How do I connect to other cloud apps?
It’s easy to create a connected table. Here’s how:

1. In the QuickBase table bar, click **New Table** and then select **Using connected data**.

2. Create the table as usual – name it and choose an icon. Then select the service you want to connect to and enter the information required for QuickBase to connect to your data – usually your user name and password.

3. Select the fields you want to add to the table.

4. If you’d like to, choose filters and set a refresh schedule. That’s it – the home page of your new connected table displays.
Your connected table displays in the table bar with the 🔄 icon. For example, here’s the home page of a table connected to Salesforce.com opportunities.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Amount</th>
<th>Probability</th>
<th>ExpectedRevenue</th>
<th>Total OpportunityQuantity</th>
<th>CloseDate</th>
<th>Type</th>
<th>NextStep</th>
<th>LeadSource</th>
<th>IsClosed</th>
<th>IsWon</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of AZ Boiler Plant</td>
<td>Proposal/Price Quote</td>
<td>900,000</td>
<td>75</td>
<td>675,000</td>
<td>02-15-2013</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edge SLA</td>
<td>Closed Won</td>
<td>60,000</td>
<td>100</td>
<td>60,000</td>
<td>11-30-2012</td>
<td></td>
<td>Existing Customer - Upgrade</td>
<td>Word of mouth</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grand Hotel’s Kitchen Generator</td>
<td>Needs Analysis</td>
<td>150,000</td>
<td>20</td>
<td>30,000</td>
<td>04-30-2013</td>
<td></td>
<td>Existing Customer - Upgrade</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grand Hotel’s SLA</td>
<td>Perception Analysis</td>
<td>50,000</td>
<td>70</td>
<td>63,000</td>
<td>06-30-2013</td>
<td></td>
<td>Existing Customer - Upgrade</td>
<td>External Referral</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Want more info? See *Getting Started with QuickBase Sync* or the online Help.

**What is a connected table?**

A connected table is a QuickBase table that contains read-only data from an external service or location, such as your QuickBooks Online customer list, Salesforce.com opportunities, or projects and resources stored in another QuickBase application.

You can have multiple connected tables within a QuickBase app. Each connected table can have one connection.

**What do connected tables contain?**

Connected tables display connected records, based on the fields you selected to connect and the filter you set. Connected tables and connected fields display an 🔄 icon.

Like all QuickBase tables, connected tables include the five built-in QuickBase fields: Date Created, Date Modified, Record ID#, Record Owner, and Last Modified By.

Connected tables also automatically include a field that QuickBase determines is unique to the data you are connecting. QuickBase uses this field when refreshing your data.

You can also add QuickBase fields to your connected tables.
What happens when I refresh my connected table?

When you refresh your connected table, QuickBase Sync compares the data in your connected table with the data in the external service. If there are changes or additions to connected data in the external service, QuickBase Sync updates your connected table with those changes.

Since the data in connected fields comes from an external service, you can’t edit the data in connected fields or add a new record to a connected table. This helps to keep your data in sync across multiple services and eliminate potential confusion about which system contains the most up-to-date information.

To add or update a record with the most current data available in the connected data service, refresh your connected table.

Do I need special permissions to create a connected table?

No. If you can create a QuickBase table within an app, then you can create a connected table in that app as well.

Can other users see my connected table?

Yes, a connected table is just like an ordinary QuickBase table. You can allow and prevent users from viewing connected data using QuickBase roles and permissions.

Can I set notifications and subscriptions on a connected table?

Yes, connected tables behave just like QuickBase tables. So, you could set up notifications to automatically let you know when a new closed and won opportunity is added to your Salesforce.com connected table.

What are “optimized for QuickBase” data sets?

Optimized for QuickBase data sets are a ready-to-use collection of the most commonly requested data sets from various cloud services, like QuickBooks Online and Salesforce.com. They are created and maintained by Intuit and designed to provide quick access to the data you need.

When creating a connected table, you can choose to create your connected table using an optimized for QuickBase data set or select from advanced data, as displayed directly from the data service’s API. In most cases, optimized data sets are the best choice for your connected table.
For example, you might choose the Accounts data set if you want to connect account names, numbers, balances, and other important fields in QuickBooks.

This optimized data set contains all the columns you’ll likely need when connecting QuickBooks accounts.

When should I create a connected table that uses another QuickBase app as its source?

If you want to include a number of fields from another QuickBase app in your app and keep the data in sync, you may want to create a connected table.

Using connected tables to access data in other QuickBase apps, instead of cross-application relationships, enables you to access all of the data that you want, rather than just specific lookup fields.

You can update the data in the connected table automatically, according to the refresh schedule that you set.

Note: Through a connection, QuickBase fields are simplified as needed to fit these types: Text, Number, Date, Time, and Checkbox. QuickBase Address fields are not available.
What if I want to connect to a lot of data?

You can set a filter to limit the data that you connect from an external service, such as QuickBooks Online or Salesforce.com. Setting a filter helps restrict records to the ones you really care about; for example, invoices from this year, rather than all invoices.

**Note:** If you are bringing a large amount of data into a connected table, it may take some time for your connected data to display the first time. Since table refreshes bring in only new or changed data, subsequent table refreshes will be much faster than the table creation.

Here are some guidelines if you expect the connected table you are creating will contain 25MB or more of data:

1. When creating your connected table, filter the table to bring in just one record.
2. Confirm that the connected table brings in the data you expect.
3. In table SETTINGS, edit the connected table to change the filter to bring in the entire record set you want.
4. In table SETTINGS, schedule the first refresh of the table to occur overnight. After the table is populated for the first time, you can change or remove the scheduled refresh.

I already have a QuickBase table; can I add connected fields to it?

You can only add connected fields to connected tables.

If you want to bring connected fields into an existing QuickBase table, you can create a new connected table, choose the fields that you want to connect, and then create relationships between that connected table and your existing QuickBase table.
Working with connected tables

Can I connect more fields in my connected table?

If you are the connection owner and an app admin, you can connect more fields from the data service at any time.

To do this, add fields like you usually do in QuickBase; click Settings on the connected table, select Fields and click New Fields.

You can also add QuickBase fields to your connected table. These QuickBase fields are associated with the connected record. If the connected record is deleted from the external service, it will also be deleted from QuickBase when the connected table refreshes.

Just like with any QuickBase table, you can create relationships among your connected table and other tables.

Note: Only the connection owner can add and delete connected fields. Others can add QuickBase fields to a connected table, but can’t connect more fields.

Can I change the fields in my connected table?

If you are the connection owner and an app admin, you can add and delete connected fields from a connected table at any time. You can also modify the filters and the automatic refresh schedule.

If you are an app admin, but not the connection owner, you can add and remove QuickBase fields (but not connected fields) and change the automatic refresh schedule.

Note: Like all QuickBase tables, connected tables automatically include the five built-in QuickBase fields: Date Created, Date Modified, Record ID#, Record Owner, and Last Modified By.
Connected tables also automatically include a field that QuickBase determines is unique to the data you are connecting. QuickBase uses this field when refreshing your data. You can’t delete it.

**Can I edit the data in a connected table?**

Since the data in connected fields comes from an external service, you can’t edit or create a new record in a connected table. This helps keep your data in sync across multiple services and eliminates potential confusion about which system contains the most up-to-date information.

You can edit non-connected fields in the table.

To add or update a record with the most current data available in the connected data service, refresh your connected table.

**How do I change the filter on my connected table?**

You can create or set a filter on your connected table at any time.

Filters limit the data that you connect from an external service, such as QuickBooks Online or Salesforce.com. Setting a filter helps restrict records to the ones you really care about; for example, invoices from this year, rather than all invoices.

To edit the filter:

1. On the connected table’s home page, click **SETTINGS**.
2. On the table settings page, click the connection, in this case, QuickBooks.
3. On the **Details** tab, click the **Edit** link next to **Filter**.

4. Adjust the filter and then click **Done**.

To see the updated data, exit **SETTINGS**, and click 🔄 **Refresh data**.

**Can I set an automatic refresh schedule?**

As an app admin and the connection owner, you can create or change the automatic refresh schedule on your connected table at any time.

1. Open your table and select **SETTINGS**.

2. On the table settings page, click the connection name.

3. On the **Details** tab, click the **Edit** link next to **Refresh**.

4. Adjust the refresh schedule and then click **Done**.

An app admin, who is not the connection owner, can also set or change an automatic refresh schedule.

**Can I copy a connected table?**

No, you can’t copy a connected table. However, if you want to make the data in your connected table editable, you can make a copy of your app with data. Doing this creates an editable copy of the table in the copied app. This copy of the connected table is not connected to the data service and can’t be re-connected.

To make a copy of your app with data:

1. In App **Settings**, select **App management**.

2. In the **Manage the app** area, select **Copy app**.

3. In the **Copy Options** area, select **Copy this application with data** and then click the **Copy Application** button.
About connections

What are connections?

Connections enable your QuickBase app to communicate with another data service or application.

A connection belongs to you and contains references to the service that it connects to, for example, Salesforce.com or QuickBooks Online. You can use your connection to create multiple connected tables in multiple QuickBase apps.

Although you can create multiple connections to a service, we recommend that you do so sparingly. While some data services, such as Salesforce.com, allow multiple connections to the same company information, others, such as QuickBooks Online, do not.

We recommend that you create a second connection only if you need to access a new account or company. In fact, QuickBooks Online allows only one connection to a company, regardless of the connection owner. You may need to coordinate among app admins when creating QuickBooks connections.

Can somebody else use my connections to create their own tables?

No. Your connection belongs to you and includes references and user permissions from the external service.

How can I manage my connections?

You can manage your connections from within your user profile:

1. Click the user dropdown on the Global bar, and then click My preferences & profile.

2. In the My Connections area, you can view information about your connections and the apps and tables that use each connection. You can edit and test connections as well as delete unused connections.

The connection owner is the only person who can test, edit, authorize, and delete a connection.
How can I stop my connected table from refreshing?
If the connected table is scheduled to refresh according to a schedule, you can edit the schedule to turn off automatic refresh.

To do this, access table SETTINGS, select the connection, and click the Edit link next to Refresh. Click Off to turn off the scheduled refresh.

You can then refresh the connected table when you’re ready by clicking Refresh data.

Syncing data
I want to keep data in sync – how can I do that?
Simply refresh your connected table. QuickBase Sync updates only the records that have changed.

You can schedule an automatic refresh of the data in your connected table every week, day, or hour.

You can also refresh the data any time you want by clicking Refresh data.

Depending upon your needs and how often the data changes, you may have connected tables that refresh at different times. For example, you may update your inventory list every Monday between 3 and 4 a.m., update your sales opportunities every evening between 10 and 11 p.m., and update your employees on an ad-hoc basis, when a new employee starts.

Don’t forget – you can also use QuickBase Sync to connect to tables in other QuickBase apps. So, you could connect to your company’s QuickBase marketing app and update the list of contacts on a weekly basis.

Do I need special permissions to refresh a connected table?
Yes, you must have admin rights in the app.
What happens to my data if there's an error?

If an error occurs during data refresh, the refresh fails. If a refresh fails, you’ll notice an error icon at the top of your connected table.

Hover over the icon to view a brief description of the problem. To access sync history, details, and troubleshooting information, click the error icon.

It is highly unusual for an error to occur when updating data in QuickBase. (If you were to encounter an error, it may occur earlier in the process, such as when logging into the external service.) Click Refresh data at any time to update your connected table.

Tip: Hover over Refresh data to see the last date and time that the table was refreshed successfully.

Technical questions

Is my data secure?

Yes. QuickBase Sync functionality is hosted in Intuit’s data center and is held to the same high availability, security, and disaster recovery standards as QuickBase, QuickBooks Online, and TurboTax.

Using QuickBase Sync to access an external cloud application or another QuickBase app requires credentials for the source application. The data exposed by the source application is governed by the permissions granted to those credentials. QuickBase Sync does not allow access to apps or tables to which a specific user does not already have access.

Are my credentials safe?

Many data services, such as Salesforce.com and QuickBooks Online, use Open Authentication (OAuth), an industry standard that securely grants access to data, while protecting personal information, such as your user name and password.

Whenever OAuth is available, QuickBase Sync uses OAuth to securely access your data. For those services that require QuickBase Sync to handle user names and passwords, QuickBase adheres to Intuit’s best practices for encryption and storage and is held to the same high availability, security, and disaster recovery standards as QuickBooks Online and TurboTax.
Do QuickBase Sync data refreshes count against my QuickBase API requests? (hint... No)
QuickBase Sync usage does not count as a QuickBase API request.

How does QuickBase Sync contact my other cloud apps?
QuickBase Sync contacts cloud apps through their API. Check with the vendor to understand what limitations and privileges are required to access the API.

How can I get help?

- Check out Getting Started with QuickBase Sync.
- Access QuickBase Help. For help while creating a new connected table, click the Help icon 🔄.
- Contact us at http://quickbase.intuit.com/support.