

Connected Services FAQs

for QuickBooks ProAdvisors

General FAQs

Q: How can I get technical support for QuickBooks Attached Documents, Intuit Data Protect or QuickBooks Connect?

A: For support questions, please call 888-333-3451.

Q: What if I want to cancel my QuickBooks Attached Documents, Intuit Data Protect or QuickBooks Connect subscription?

A: To cancel your subscription, please call 888-333-3451.



QuickBooks Attached Documents

Q: What subscription type is included in the ProAdvisors Membership Package?

A: The subscription of QuickBooks Attached Documents included in the ProAdvisor Membership Package is for a single QuickBooks company file and you can attach up to 5 documents per transaction or record. This is valued at $179.40/year (tax not included). Intuit strongly recommends setup this service on your very own company file.

Q: How do I access QuickBooks Attached Documents?

A: In order to activate your free subscription, you have to call the ProAdvisor Connected Services team. Call 888-333-3451 to speak to a representative.

Q: What if my client(s) have a subscription of Attached Documents and I want to be able to view or attach documents in their company file?

A: You need to request your client (or the subscription owner/administrator) to add you as a user to their subscription of Attached Documents at no extra cost. For more detailed information about this process, please refer to article [HOW12757](http://support.quickbooks.intuit.com/support/articles/HOW12757).

Q. If I maintain QuickBooks company files for multiple clients and I want to purchase a subscription of Attached Documents for each file, who do I contact to purchase the subscriptions?

A: You can contact our ProAdvisor Sales team by calling 888 250-7279 and specifying to the sales agent that you are purchasing these subscriptions for your client’s company files.

Q: What if I am already using QuickBooks Document Management with my company file in QuickBooks 2010 and I upgrade the company file to QuickBooks 2011?

A: Contact the ProAdvisor Connected Services team by dialing 888-333-3451 in order to guide you through the upgrade process.

Q: Are there any system requirements?

A: Yes.

Minimum system requirements for QuickBooks Attached Documents:

* Internet access required when attaching files online
* 2.0 GHz processor, 2.4 GHz recommended
* 1 GB RAM for single user, 2 GB RAM recommended for multiple users
* 2.5 GB available disk space (additional space required for data files and locally attached documents)
* 250 MB disk space for Microsoft .NET 3.5 Runtime (provided on the QuickBooks CD)
* Optimized for 1024 X 768 screen resolution. 16-bit or higher color
* 4x CD-ROM

Q: What if I want to switch my plan to QuickBooks Attached Documents – Unlimited Attachments?

A: Contact the ProAdvisor Connected Services team by dialing 888-333-3451 in order to guide you through the subscription upgrade process. Keep in mind that upgrading your subscription to the Unlimited Attachments tier, it will become a paid subscription.

Q: What if I want to submit feedback on the product?

A: Feedback on the product can be e-mailed to QBDocMgmt@Intuit.com. Also, inside the online Document Management Center Help tab, you’ll find a link to “Submit feedback.”

Attached Documents Terms and Conditions

If you cancel or do not renew your ProAdvisor Program membership, access to this service will terminate immediately along with the termination of your membership. Must be on a supported version of QuickBooks. Not available to QuickBooks for Mac or QuickBooks Online users. Only TWAIN compliant and Fujitsu ScanSnap S300 scanners supported. Scanner not included. Maximum 100 MB per attached file if the file is stored online. You can cancel at any time by calling 888-333-3451. Terms, conditions, features, availability, pricing, fees, service and support options subject to change without notice.



Intuit Data Protect

Q: What subscription type is included in the ProAdvisors Membership Package?

A: The subscription of Intuit Data Protect included in the ProAdvisor Membership Package is the Entire PC tier, which includes 100 GB of space with each ProAdvisor membership and it is valued at $119.40/year (not including tax). Intuit strongly recommends setup of this service on the PC where the company files are physically stored. For more details about this application, please refer to article [INF12891](http://accountant.intuit.com/support/document.aspx?id=INF12891).

Q: How do I access Intuit Data Protect?

A: In order to activate your free subscription, you have to call the ProAdvisor Connected Services team. Call 888-333-3451 to speak to a representative.

Q: Are there any system requirements?

A: Yes.

Minimum system requirements for QuickBooks Attached Documents:

* QuickBooks 2011 Pro, Premier, or Enterprise Solutions 11.0 must be installed on your PC.
* Internet Access
* 2.0 GHz processor, 2.4 GHz recommended
* 1 GB RAM for single user, 2 GB RAM recommended for multiple users
* 2.5 GB available disk space (additional space required for data files)
* 250 MB disk space for Microsoft .NET 3.5 Runtime (provided on the QuickBooks CD)
* Optimized for 1024 X 768 screen resolution. 16-bit or higher color
* 4x CD-ROM

Q: What if I am a QuickBooks Online Backup subscriber?

A: If you are currently subscribed to QuickBooks Online Backup, you have 3 options:

1. Continue using your QuickBooks Online Backup subscription without activating Intuit Data Protect.
2. Continue using your QuickBooks Online Backup subscription AND activating Intuit Data Protect, technically using both services at the same time.
3. Cancel your QuickBooks Online Backup subscription and activate Intuit Data Protect.

The two applications are unrelated, and there is no migration plan between them. If you wish to cancel your subscription to Online Backup in order to entirely switch to Intuit Data Protect, call the ProAdvisor Tech Support team to guide you through the cancelation process.

Q: Are there any limitations?

A: Intuit Data Protect only works with QuickBooks 2011 and Enterprise Solutions 11.0 desktop versions and the computer must be turned on with an active internet connection in order to successfully perform a backup. Intuit Data Protect is not available for QuickBooks for Mac or QuickBooks Online. Intuit Data Protect is not supported on Terminal Services Networks, Right Networks and other types of remote networks.

Intuit Data Protect Terms and Conditions

If you cancel or do not renew your ProAdvisor Program membership, access to this service will terminate immediately along with the termination of your membership. Entire PC is limited to 100 GB total storage. Data is encrypted using AES 256-bit encryption. Backups run when files are open in the background: In order to back up files on a server, the files must be closed or not in use. Requires Internet access and QuickBooks Pro, Premier, Accountant, and or Enterprise 2011 (sold separately). Not available to QuickBooks for Mac or QuickBooks Online users. Intuit Data Protect is not intended as a HIPAA solution and its use will not assist with or ensure HIPAA compliance. Terms, conditions, features, availability, pricing, fees, service and support options subject to change without notice. If you cancel or do not renew your ProAdvisor Program membership, access to this service will terminate immediately along with the termination of your membership.



QuickBooks Connect

Q: What is included in the ProAdvisors Membership Package?

A: The subscription you receive with your ProAdvisor Membership includes 3 users for

QuickBooks Connect to use with a single QuickBooks company file. This subscription is valued at $359.40/year (not including tax).

Q: What is QuickBooks Connect?

A: QuickBooks Connect is an application that allows a QuickBooks user to access and enter Accounts Receivable transactions from a web or mobile app. For more information, please visit the QuickBooks Connect webpage by following this link: <http://appcenter.intuit.com/quickbooksconnect>

Q: I have multiple employees entering data in my QuickBooks company file, can I add more users?

A: You can add users to QuickBooks Connect for $9.95/mo. QuickBooks Connect can support up to 5 users per subscription.

Q: How do I activate my QuickBooks Connect?

A: In order to activate your free subscription, you have to contact the ProAdvisor Connected Services team. Call 888-333-3451 to speak to a representative.

Q: What mobile devices are supported?

*A: Supported devices include:*

* *iPhone/iPad*
* *Android based phones: Droid, Droid II, Droid X, HTC Evo4.*
* *Android based tablets (web app only)*

Q: What if I maintain QuickBooks company files for clients and I want to provide them access to QuickBooks Connect for their respective files?

*A: You can contact our ProAdvisor Sales team by calling 888 250-7279 and specifying to the sales agent that you are purchasing these subscriptions for your client’s company* *files.*

Q: What if my clients have a subscription to QuickBooks Connect and I want to view their data?

*A: If your client has a subscription of QuickBooks Connect, you will have to purchase an additional user for this specific company file in order to view your client’s information.*

Q: Are there any minimum requirements for the web/mobile application?

*A: Yes.*

*Minimum System Requirements:*

* *Internet connection and a web browser that supports Adobe Flash technology.*
* *Mobile OS version: Supports iOS v.4.1 & up and Android OS 2.1 & up*
* *For mobile devices, a data plan might be required. Please contact your wireless service provider for more information.*

Q: What if I purchase a new phone?

*A: You can download the application from iTunes (iPhone) or from the Android Market (Android based phones) and log in using your credentials.*

Q: What if I lose my phone?

*A: Immediately contact the ProAdvisor Connected Services team at 888-333-3451 to temporarily disable the service and assist you in setting up a new login.*

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