



# **Method Initial Setup Guide**

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**Version 1.0**

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# Initial Setup

## Setting up Integration with QuickBooks


### Installing the Method Integration Engine

1. Choose a computer that is rarely turned off, and is usually logged into *QuickBooks* with Administrator permissions.
2. Open *QuickBooks* to the company file you want to sync your Method account to.

*Note: Make sure you select the correct QuickBooks company file. Once you link a QuickBooks company file to a Method account, you cannot easily link a different company file without having to create a brand new account.*

3. Sign into your Method account by going to <http://www.methodintegration.com> and clicking the *Sign In* link.
4. Click on the *QuickBooks* tab.
5. Under the *Connect QuickBooks to your account* section, step 3, click the *Install now (click here)* link.
6. Download and install the Method Integration Engine by following the on-screen steps. Be sure to install both QBFC and the Method Integration Listener.
7. Once the installation is complete, you should be viewing the *Method Integration Engine* window.

*Note: If the Method Integration Engine is not open, click **Start > Programs > Method > Method Integration Engine for Use with QuickBooks.***

*If the Method Integration Engine is not visible, right-click on the  icon in your taskbar next to the clock in the lower right-hand corner of your screen, and click *Display*.*

8. Enter your *Method Account, User Name* and *Password*.
9. Click **Connect**.
10. When prompted by *QuickBooks*, choose the 'Yes Always...' option.
11. Wait until the full synchronization process completes.
12. Close and reopen *QuickBooks* on this computer. *This is an important step. If you do not perform this step, the real time synchronization will not occur.*
13. Repeat steps 2 through 12 for all other computers that use *QuickBooks*. *This step will set the other computers to be "OnDemand From Desktop" mode so that changes made in QuickBooks sync automatically to the web.*

### How do I know the installation worked?

#### Verifying real-time syncing from QuickBooks to Method

This test verifies that both the Method Integration Engine and the Method Integration Listener are installed and functioning correctly.

1. In *QuickBooks*, add a customer named "AAAAAAAA".
2. Wait for 10 seconds. *Note that in most situations the change is actually instantaneous.*
3. In *Method*, go to **Customer Center > Customer List**.
4. You should see "AAAAAAAA" as a customer in the *Existing Customers* section. If you do not see the "AAAAAAAA" customer, click **Refresh**.

If this process does not work, see the Troubleshooting chapter at the end of this guide for the Method Integration Listener and Method Integration Engine.

### Verifying real-time syncing from Method to QuickBooks

Having performed the previous test above, this test verifies that the *Method PUSH* technology is working correctly.

1. In the *Existing Customers* section of the *Customer List* screen, click *Select* next to the "AAAAAAAA" customer.
2. Click **Delete**.
3. Wait for 10 seconds. *Note that in most situations the change is actually instantaneous.*
4. In *QuickBooks*, go to your customer list and verify that the customer "AAAAAAAA" was deleted from QuickBooks.

If this process does not work, see the Troubleshooting chapter at the end of this guide for Method PUSH.

## Setting up users

A user is any employee or subcontractor you assign tasks to. Typically, setting someone up as a user will grant them access to Method so that they can sign in.

### Allowing additional users to be added to your account

1. Click the *Customize* tab. If you don't see the *Customize* tab, change the Tab Group / Role in the top right to 'Admin'.
2. Click the *My Account* tab link.
3. Under the *My Apps* section, click "(change)" next to *Method Starter / CRM / Full Blown edition (active)*.
4. Change the number of users to be the total number of additional users that will need to sign into Method, and click **change users**.

### Creating new Users

1. Click the *Customize* tab. If you don't see the *Customize* tab, change the Tab Group / Role in the top right to 'Admin'.
2. Click the *Users* tab link.
3. Enter a new *User Name*.

4. Click **Continue**.
5. Follow the steps on the screen. Pay special attention to step 8 and step 9. Here you can both allow the user to only have access to certain Tab Groups / Roles, and also set the default Tab Group / Role that the user will see when they first sign in.
6. Click either **Add User & email invitation** or **Add User**.
7. The **Edit Settings** screen will appear.
8. Set any additional preferences, and click **Finish**.

## Troubleshooting

### Troubleshooting – Installation of Method Integration Engine

Use this section if you have errors during the installation process.

#### Message: “Unable to install or run app”

You may receive the following message: “Unable to install or run app. The app requires that assembly Interop.QBFC8 Version 8.0.0.87 be installed in the Global Assembly Cache (GAC) first.”

1. In *Windows*, click **Start > Control Panel**, or **Start > Setting > Control Panel**, depending on your version of Windows.
2. Double-click on **Add or Remove Programs**.
3. Look for QBFC, version 1.0 up to 8.0, and remove this program from your computer. Note that this step may affect other QuickBooks integrated software.
4. Perform a complete installation again by following the steps for “Installing the Method Integration Engine”.

#### Recommendation: Ensure .Net framework is installed

Please ensure that you have the latest updates for Windows .Net Framework. Not having this will prevent you from being able to install the QBFC and other files.

1. In *Windows*, click **Start > Programs > Windows Updates**.
2. Follow the instructions on your screen to install all recommended Windows Updates.
3. Perform a complete installation again by following the steps for “Installing the Method Integration Engine”.

#### Recommendation: Ensure you are installing with administrative permissions

To find out if you have administrative rights:

1. Right-click on the *Start* menu.
2. If you see the “Open All Users” or “Explore all Users” options then you have administrative rights.

3. If you do not have administrative rights please contact you IT manager and ask them to log in and run through the installation steps.

## Troubleshooting – Method Integration Listener

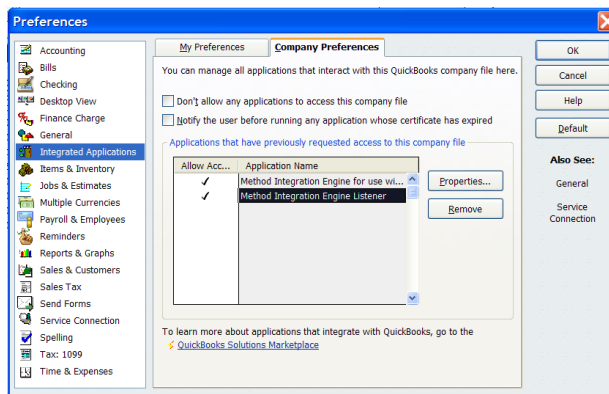
The *Method Integration Listener* is a tool that listens in real-time to changes that occur in QuickBooks, and notifies the Method Integration Engine to update the server.

### Step 1: Verifying the Method Integration Listener is installed

1. In *Windows*, click **Start > Control Panel**, or **Start > Setting > Control Panel**, depending on your version of Windows.
2. Double-click on **Add or Remove Programs**.
3. Verify that *Method Listener for use with QuickBooks* is listed.
4. If it is not listed, perform a complete installation again by following the steps above for “Installing the Method Integration Engine”.


### Step 2: Verifying the Method Integration Listener is integrated with QuickBooks

1. In *QuickBooks*, click **Edit > Preferences**.
2. Click on the *Integrated Applications* icon.



3. Ensure that *Method Integration Engine Listener* is listed.
4. If the *Method Integration Engine Listener* is listed, ensure that it has a checkbox under the *Allow Access* column.
5. If it is not listed, open the *Method Integration Engine*, and click **Synchronize > Changes-Only Synchronization**. Once the synchronization completes, close and reopen QuickBooks and try steps 1 to 3 again.

*Note:* If the *Method Integration Engine* is not open, click **Start > Programs > Method > Method Integration Engine for Use with QuickBooks**.

If the *Method Integration Engine* is not visible, right-click on the  icon in your taskbar next to the clock in the lower right-hand corner of your screen, and click *Display*.

### Step 3: Verifying the Method Integration Listener is hearing changes in QuickBooks

1. In *Windows*, click **Start > Run**.
2. Type "C:\Program Files\Method\ListenLog.txt" and click **OK**.
3. Scroll to the bottom.
4. Based on the date of the last entry, you should see evidence of recent changes being detected.

```
10/9/2009 8:21:47 AM CompanyFilePath=C:\DataFiles\Alocet-Enterprise.qbw
10/9/2009 8:21:47 AM CompanyFileEventOperation=Close
10/9/2009 8:22:14 AM IQBEventCallback-Inform
10/9/2009 8:22:14 AM CompanyFilePath=C:\DataFiles\Training DatabaseQB2007_April15.08W
10/9/2009 8:22:14 AM CompanyFileEventOperation=Open
10/9/2009 8:22:14 AM Preparing to write to: c:\Documents and Settings\All Users\Application Dat
10/9/2009 8:22:14 AM Finished writing to: C:\Documents and Settings\All Users\Application Data\
```

5. If changes are not being picked up, check to see if the *Method Integration Engine* is running by right-clicking on the clock in the lower right-hand corner of your screen, choosing *Task Manager*, and ensuring that "MethodQBListen" is listed under the *Applications* tab.
6. If MethodQBListen is running, but changes are not being written to the ListenLog.txt, there could be a permissions issue.
  - a. Navigate to C:\Program Files.
  - b. Right-click on the "Method" folder, and choose *Properties*.
  - c. Click on the *Security* tab.
  - d. Ensure *Full Control* is granted to all users on this folder.
7. If MethodQBListen is not running, but *Method Integration Listener* is listed under *Integrated Applications* in *QuickBooks*, there could be a problem with a corrupt COM Add-In file for QuickBooks.
  - a. Delete the file C:\Documents and Settings\All Users\Application Data\Intuit\QuickBooks\qbsubconfig.xml.

*Note: If you are unable to locate this file, use the Find tool on your computer to search for the file called 'qbsubconfig.xml'.*

*Note: Deleting this file will cause all QuickBooks COM add-ins to re-create their subscriptions. This should happen automatically next time QuickBooks is started.*
  - b. Close and reopen QuickBooks.

### Step 4: Verifying the Method Integration Listener is sending changes to the Method Integration Engine

1. Navigate to the Engine Log folder.


If you are using Windows XP, the Engine Log folder is typically "C:\Documents and Settings\All Users\Application Data\MethodIntegration".

If you are using Vista or later, the Engine Log folder is typically "C:\ProgramData\MethodIntegration".

*Note: If you are using Vista or later and do not see this folder, you must edit your computer settings to show hidden folders:*

- a. Click **Start > Control Panel**.
  - b. Click *Folder Options*.
  - c. Click the *View* tab.
  - d. Click *Show hidden files and folders*. If you want to see system files as well, unclick *Hide protected operating system files (Recommended)*.
  - e. Click **OK**.
2. Delete the log file if it already exists. This is typically your "QuickBooks Company File.qbw".
  3. Ensure the *Method Integration Engine* is open and connected.

*Note: If the Method Integration Engine is not open, click **Start > Programs > Method > Method Integration Engine for Use with QuickBooks**.*

*If the Method Integration Engine is not visible, right-click on the  icon in your taskbar next to the clock in the lower right-hand corner of your screen, and click *Display*.*

4. Make a change in QuickBooks, such as creating a new customer.
5. Refresh the Engine Log folder to see if the log file was recreated.
6. If the log file was not recreated, there may be a permissions issue on this folder (see next step below).
7. If the log file was recreated, open it and see if the change was picked up by the *Method Integration Engine*. If the *Method Integration Engine* is open, and it is currently not synchronizing, and the log file is empty, everything is working as it should. However, if it is currently not synchronizing and the log file is not empty, there may be a permissions issue on this folder.

To ensure there are sufficient permissions on the Engine Log folder:

- a) Right-click on the folder and choose **Properties**.
- b) Click the *Security* tab.
- c) Add permissions such that all users have *Full Control* and click **OK**.

**If the steps above succeed, the Method Integration Listener is working correctly.**

## **Troubleshooting – Method Integration Engine**

The *Method Integration Engine* is the main synchronization tool that shuttles changes back and forth between QuickBooks and the web server.

### **Step 1: Verifying the Method Integration Engine is installed**



1. In *Windows*, click **Start > Control Panel**, or **Start > Setting > Control Panel**, depending on your version of Windows.
2. Double-click on **Add or Remove Programs**.
3. Verify that both *Method Integration Engine for use with QuickBooks* is listed, and *QBFC 8.0* is listed.
4. If either is not listed, perform a complete installation again by following the steps above for "Installing the Method Integration Engine".


### **Step 2: Verifying the Method Integration Engine is integrated with QuickBooks**

1. In *QuickBooks*, click **Edit > Preferences**.
2. Click on the *Integrated Applications* icon.
3. Ensure that *Method Integration Engine for use with QuickBooks* is listed.
4. If the *Method Integration Engine for use with QuickBooks* is listed, ensure that it has a checkbox under the *Allow Access* column.

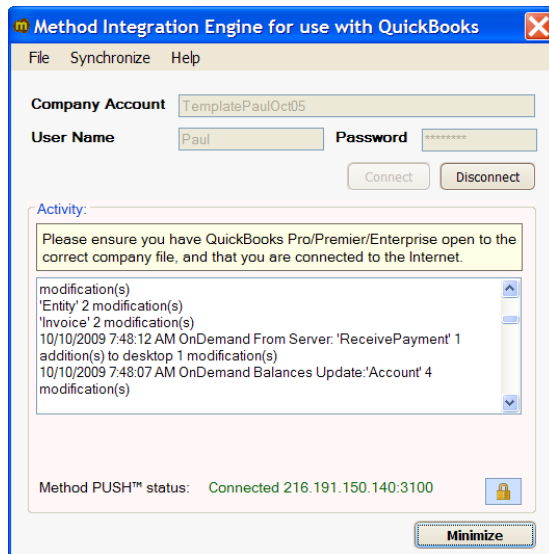
### **Step 3: Verifying error free synchronization**

1. Ensure that you are logged into QuickBooks as an administrator if it is a first time synchronization.
2. If you are using Vista, make sure UAC is turned on.
  - a. Click **Start > Control Panel**.
  - b. Type "UAC" into the *search* box.
  - c. You should see an option "Turn User Account Control (UAS) On Or Off". Click this link.
  - d. Choose to turn UAC "On".
  - e. Click **Save**.
  - f. Restart your computer.
3. With QuickBooks open, open the *Method Integration Engine*.

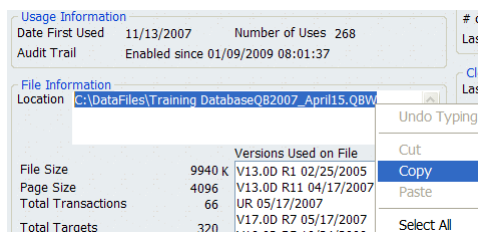
*Note: If the Method Integration Engine is not open, click **Start > Programs > Method > Method Integration Engine for Use with QuickBooks**.*

*If the Method Integration Engine is not visible, right-click on the  icon in your taskbar next to the clock in the lower right-hand corner of your screen, and click *Display*.*

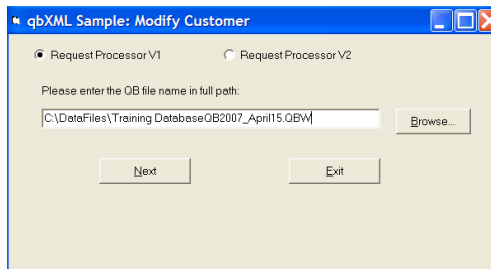
4. Click **Synchronize > Changes-Only Synchronization**.
5. When the synchronization completes, check the Activity area and scroll down to see if there are any messages that start with "Error".



6. If there are error messages, see if there are any recommendations written beside the error, and if so follow the recommendation.
7. If you receive a message that reads “An internal error has occurred...”, it likely points to either an issue with QuickBooks, or corruption in your QuickBooks company file.
  - a. To check for updates in QuickBooks, click **Help > Update QuickBooks**. If there are any updates to download you should download and install them, restart your computer, and try to synchronize again.
  - b. To check for corruption in your QuickBooks company file, click **File > Utilities > Rebuild Data**. After the process completes, try to synchronize again.
8. If error messages persist, check for QuickBooks SDK issues by running a QBSDK Test:
  - a. Open *QuickBooks* to the correct company file.
  - b. In *QuickBooks*, click F2.



- c. Highlight the text in the *Location* text box in the *File Information* section.
- d. Right-click and choose Copy.
- e. Download and run the following utility:  
<http://www.alocet.net/utilities/qbmodifycustomer4.exe>
- f. In *qbmodifycustomer4*, paste the path into the *Please enter the QB file name in full path* text box.



- g. Click **Next**.
  - h. Choose "Yes Always".
  - i. Select a customer from the *Customer Full Name List*.
  - j. Click **Modify**.
  - k. Click **Modify Customer**.
9. If the *QBSDK Test* failed, you will likely have to reinstall QuickBooks. To properly reinstall QuickBooks:
- a. Make a backup of your QuickBooks company file.
  - b. Uninstall QuickBooks from Start > Control Panel > Add / Remove Programs.
  - c. Manually delete the "C:\Program Files\Common Files\Intuit\QuickBooks" folder.
  - d. Reinstall QuickBooks.
10. For further assistance, please contact technical support.


## Troubleshooting – Method PUSH

*Method PUSH* is the technology that allows changes made in Method to sync in real-time back to QuickBooks. In order for this to occur, the Method Integration Engine initiates a TCP/IP connection to the server. If your IT manager has blocked outgoing TCP/IP connections or has blocked ports on your network, Method PUSH may not work.

### Step 1: Verifying the Method Integration Engine is installed

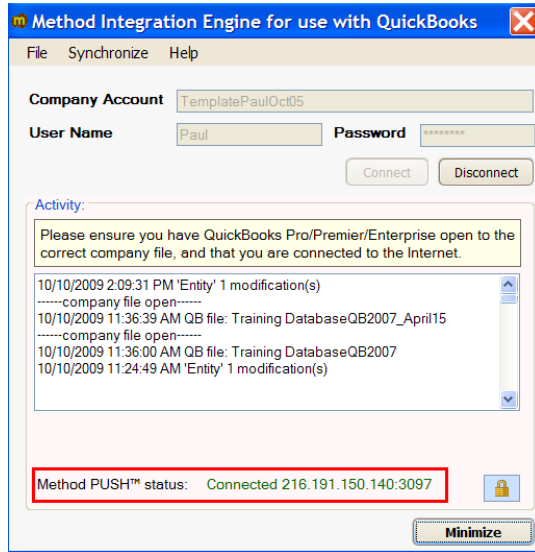
1. With QuickBooks open, open the *Method Integration Engine*.

*Note: If the Method Integration Engine is not open, click **Start > Programs > Method > Method Integration Engine for Use with QuickBooks**.*

*If the Method Integration Engine is not visible, right-click on the  icon in your taskbar next to the clock in the lower right-hand corner of your screen, and click Display.*

2. Enter your *Method Account, User Name* and *Password*.
3. Click **Connect**.
4. Wait until the synchronization is complete.

5. Check the Method PUSH status.



6. If the status shows “Connection Failure” instead of “Connected” or “Not Connected”, an issue with establishing an outgoing TCP/IP connection has occurred.
- Hover your mouse over the “Connection Failure” label to see if additional information about the message shows.
  - Check with your IT manager to ensure that you have a high-speed internet connection.
  - Check with your IT manager to ensure that your anti-virus and firewall settings permit an outgoing TCP/IP connection.
7. If your IT manager would like to only allow Method to use a specific port range, please follow the steps below:
- Navigate to the Engine Log folder.  
  
If you are using Windows XP, the Engine Log folder is typically “C:\Documents and Settings\All Users\Application Data\MethodIntegration”.  
  
If you are using Vista or later, the Engine Log folder is typically “C:\ProgramData\MethodIntegration”.  
  
*Note: If you are using Vista or later and do not see this folder, you must edit your computer settings to show hidden folders:*
  - Create an empty text file called “MethodPush.config”.
  - Edit the MethodPush.config file.
  - Put the following into the contents of the file, where 3000 is an example for the lowest port number in your IT manager’s desired range, and 3100 is an example of the highest port number in your IT manager’s acceptable range.

```
<LocalPortMin>3000</LocalPortMin>
<LocalPortMax>3100</LocalPortMax>
```


- e. Save and close the file.
- f. In the *Method Integration Engine* click **Disconnect**, and then **Connect**.

## Uninstalling the Method Integration Engine and Listener

*NOTE: If you have attempted to remove Method from your computer already, you will need to reinstall Method in order to properly follow the steps below. To reinstall Method, follow the steps under the QuickBooks tab. Once that is done, proceed with the steps below.*

1. Open *QuickBooks*.
2. Open the *Method Integration Engine*.

*Note: If the Method Integration Engine is not open, click **Start > Programs > Method > Method Integration Engine for Use with QuickBooks**.*

*If the Method Integration Engine is not visible, right-click on the  icon in your taskbar next to the clock in the lower right-hand corner of your screen, and click **Display**.*

3. In the *Method Integration Engine*, click **Disconnect**.
4. Click **Synchronize > Real time QuickBooks Subscription > Remove Subscription**.
5. Click **File > Shut Down**.
6. In *QuickBooks*, click **Edit > Preferences**.
7. Click *Integrated Applications*.
8. Click the *Company Preferences* tab.
9. Click *Method Integration Engine Listener*.
10. Click **Remove**.
11. Click **Yes**.
12. Click *Method QuickBooks Desktop Integration Engine* for use with *QuickBooks*.
13. Click **Remove**.
14. Click **Yes**.
15. Click **OK**.
16. Click **File > Exit**.
17. Once *QuickBooks* is closed, try to reopen it. If you receive the message to enable Method with *QuickBooks* again, click **Cancel** and continue with the steps below. If you do not receive a prompt from *QuickBooks* asking for Method to connect, move to step 18.
  - a. Ensure *QuickBooks* is closed.

- b. Open My Computer and navigate to: C:\Documents and Settings\All Users\Application Data\Intuit\QuickBooks

Note: If you are unable to locate this file, use the Find tool on your computer to search for the file called 'qbsubconfig.xml'.

- c. Delete the file called qbsubconfig.xml.
- d. Reopen *QuickBooks*.

18. In *Windows*, click **Start > Control Panel > Add or Remove Programs**.

19. Remove the *Method Integration Engine*.

20. Remove the *Method Integration Listener*.

## QuickBooks Integration FAQ

### Q1: Why can't I do a Changes-Only synchronization on computers other than the 'main' computer?

A1: Limiting Changes-Only and Full Synchronization to a single computer eliminates the possibility to two computers synchronizing the same data between QuickBooks and the server at the same time. This reduces your network traffic, the number of requests made to QuickBooks, bandwidth between your network and the server, as well as prevents database records from being edited by multiple synchronizations at the same time.

### Q2: How do I change the computer I use as the 'main' syncing computer?

A2:

- a) Confirm you have the correct company file open in *QuickBooks*.
- b) In *Method* click the *QuickBooks* tab.
- c) Under the *Edit Synchronization Preferences* section, click **Reset** beside *Computer to Sync With*.
- d) Click **Save Changes**.
- e) On the computer you want as the new 'main' syncing computer, install the *Method Integration Engine* and run a full synchronization.

### Q3: How do I reset my account and use a different QuickBooks file?

A4: When you sync your QuickBooks company file to your Method account the company file and the account are bound together. You cannot reuse an account on a different QuickBooks company file without causing data conflicts and inconsistencies. If you need to sync a second company file, you'll need to open a second account.


### Q4: I have renamed my QuickBooks company file, but it is otherwise the same. How do I allow my Method account to sync with this?

A4:

- a) Confirm you have the correct *QuickBooks* company file open.
- b) In *Method* click the *QuickBooks* tab.

- c) Under the *Edit Synchronization Preferences* section, click **Reset** next to *QuickBooks file*.
- d) Open the *Method Integration Engine*.

*Note: If the Method Integration Engine is not open, click **Start > Programs > Method > Method Integration Engine for Use with QuickBooks**.*

*If the Method Integration Engine is not visible, right-click on the  icon in your taskbar next to the clock in the lower right-hand corner of your screen, and click *Display*.*

- e) In the *Method Integration Engine* click **Connect**.

#### **Q5: What version of QuickBooks do I need in order to use Method?**

A5:

US versions of QuickBooks Pro/Premier/Enterprise 2004 or higher

Canadian versions of QuickBooks Pro/Premier/Enterprise 2008 or higher

UK versions of QuickBooks Pro/Premier/Enterprise 2008 or higher

Australia versions of QuickBooks Pro/Premier/Enterprise 2008 or higher

Note: Only Windows versions are supported. There is no integration for QuickBooks for Macintosh.

QuickBooks Free, QuickBooks Simple Start and QuickBooks Online are not supported.

#### **Q6: Does QuickBooks need to be open in order to use Method?**

A6: You can still use Method to access and modify information even if QuickBooks is closed. Any changes will be synchronized with QuickBooks next time it is opened on the main syncing computer. If you want to take advantage of Method's real-time syncing, QuickBooks must be open, and be open to the correct company file.

#### **Q7: Does Method work on a Mac?**

A7: The Method Integration Engine must be installed on a Windows computer. Dispatchers, however, can log in to their Method account via FireFox for Macintosh.

#### **Q8: What happens to my data if I cancel my account?**

A8: Once we have confirmed your cancellation your Method data will be permanently deleted within 30 days.