Vonage
Business Solutions™

QuickBooks Plugin FAQs

1. What is the QuickBooks plugin?

The QuickBooks plugin for the Vonage Business Desktop allows you to link your QuickBooks account to your Vonage extension(s).

The Desktop will search your QuickBooks account for the caller ID name and phone number associated with your inbound and outbound calls.

You can use your call information to view your callers QuickBooks balance history or search the contact within your QuickBooks account.

2. How can I get the QuickBooks plugin?

In order to use the QuickBooks plugin, you must first have the Vonage Business Desktop installed. If you do not already have the program installed, visit http://www.vonagebusiness.com/desktop to download and install the application.

NOTE: You must have Microsoft Silverlight installed in order to run the Desktop, which can also be downloaded from the page referenced above.

Once you have installed the Desktop application, contact Vonage's Customer Care Team and request to have the QuickBooks plugin added for your extension(s).

After the plugin has been added, navigate to the "Plugins" page of the Desktop. You will see a "Plugins" button in the upper, right-hand corner of the application screen. Find the QuickBooks plugin from the list, and then click "Install." The Desktop will then download and install the plugin.

3. How much does the QuickBooks plugin cost?

The plugin will cost $4.99 per extension, per month.

NOTE: Pricing is allocated per extension, not per QuickBooks user. Also, be sure to ask about periodic special pricing promotions.

4. What version of QuickBooks do I need to run this plugin?

The plugin is compatible with QuickBooks Online, QuickBooks 2012 (Windows), QuickBooks Pro (Windows), QuickBooks Premier 2012 (Windows), and QuickBooks Enterprise Solutions 12.0.

5. How do I link my QuickBooks account with the plugin?

After the plugin has been installed, on the "Plugins" page, click "Edit Settings" next to the QuickBooks plugin.

In the "QuickBooks Settings and Preferences" pop up window, choose whether you want the plugin to search QuickBooks for incoming calls or outgoing calls, or both.

Click "View My Apps" to view your currently installed applications within QuickBooks.

To configure your QuickBooks account with the Desktop click "Connect to QuickBooks."

In the browser window you will login with your QuickBooks credentials then click "Sign In."

The next window will state "Desktop Plugin would like to access your Intuit company data," click "Authorize" to securely share your data with the Desktop.

When your login information has been securely confirmed you will receive a "You may now close this window" message.

Back at the "QuickBooks Settings and Preferences" window within the Desktop, you will see that the plugin has "Successfully acquired necessary tokens from QuickBooks" and you are now ready to use the plugin.

Click "Apply" to save your selections.

6. What does it mean that "the application requesting access to your Intuit data has not been approved by Intuit and is not bound to Intuit's terms of service..."?

Our application has not yet completed QuickBooks's technical review. Because of this, our app displays the red banner below.

Our QuickBooks application _does meet Intuit's requirements_ and is now going through their approval process. Due to customer demand for this integration, we are releasing the solution to customers in parallel with this approval process.

Once we complete this process, this red banner will be removed. Any changes to the application will be distributed in an auto-update.

7. How do I remove the QuickBooks plugin?

To remove the QuickBooks plugin, navigate to your "Plugins" page by clicking the button in the upper, right-hand corner of the Desktop application.

Find the plugin, and click the "Uninstall" button. The Desktop will remove the plugin.

Like any other Vonage service, you must contact Vonage's Customer Care Team to remove the QuickBooks plugin from your service plan in order to avoid being charged again for the service.

If you ever need to disconnect your account from the QuickBooks plugin click "Disconnect from QuickBooks" within the "QuickBooks Settings and Preferences."

8. The QuickBooks plugin is minimized on my Desktop "Call Details" page. How do I make it the default plugin?

To make the QuickBooks plugin the default Desktop plugin, navigate to the "Plugins" page by clicking the button in the upper, right-hand corner of the page.

Find the plugin and check the box labeled "Default Plugin" (display in center area for new calls).

Now the QuickBooks plugin will always display full information on your "Call Details" page.