



**Expectation for
Mitchell 1 QuickBooks Integrator
Mitchell and ShopKey
versions 5.9.5**

- The Mitchell1 Support Technician MUST create a brand new company file in QuickBooks in order to get the Manager program to integrate with QuickBooks. There are no exceptions to this rule. Numerous reasons exist as to why we cannot use an existing company file including duplication and errors in which there is no possible workaround.
- Mitchell1 Technical Support will install the Integrator for the customer once the Management program is installed along with a compatible version of QuickBooks (Pro, Premier, Enterprise versions 2008 to present). The customer is responsible for getting QuickBooks installed prior to the integrator Installation.
- It is preferred that Integrator be installed on the host/server computer or on any workstation that is networked to the host and has Manager installed (if subscribed for a Manager Multi-user license). Mitchell1 only supports Windows XP, Vista, and 7.
- Technical Support will verify all default account settings are selected. Additional support can be provided for advanced account setup in the Manager Program and Integrator if requested. The customer is responsible for the QuickBooks program itself and for accounting services.
- The customer must select a Start Date for the Integrator. This is the date in which invoices and payments will start synchronizing over from. The default is January 1st of the current year. The start date cannot be older than the date the first invoice was posted in the Mitchell1 Manager program.
- After Installation, Mitchell1 will perform two synchronizations and will ensure that all information came over correctly.
- Training on how to integrate, how often, and the do's and don'ts of using QuickBooks with the Integrator will be provided after installation.