QuickBase Sync for Cloud Apps

Bring data from your favorite cloud apps into QuickBase
and keep it in sync automatically
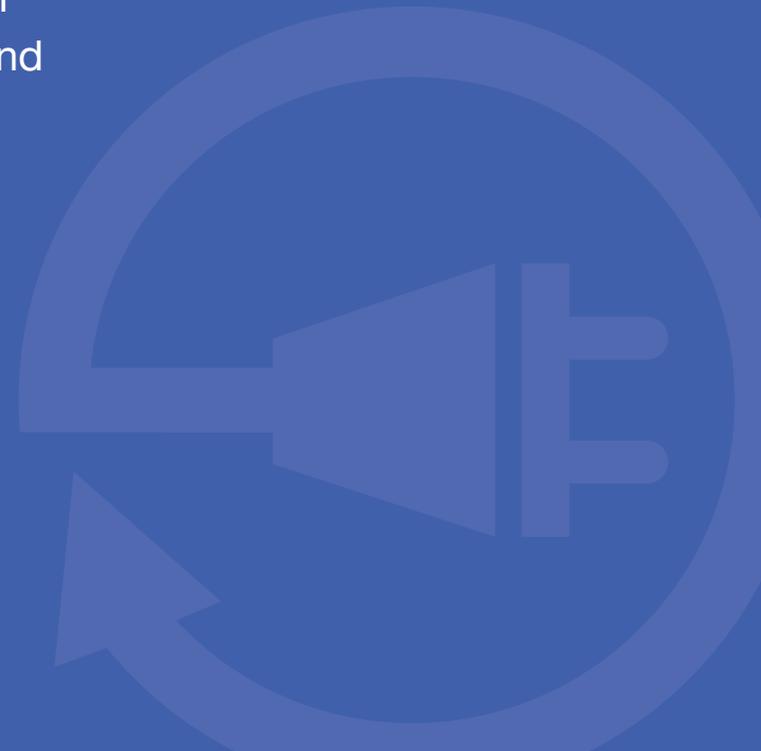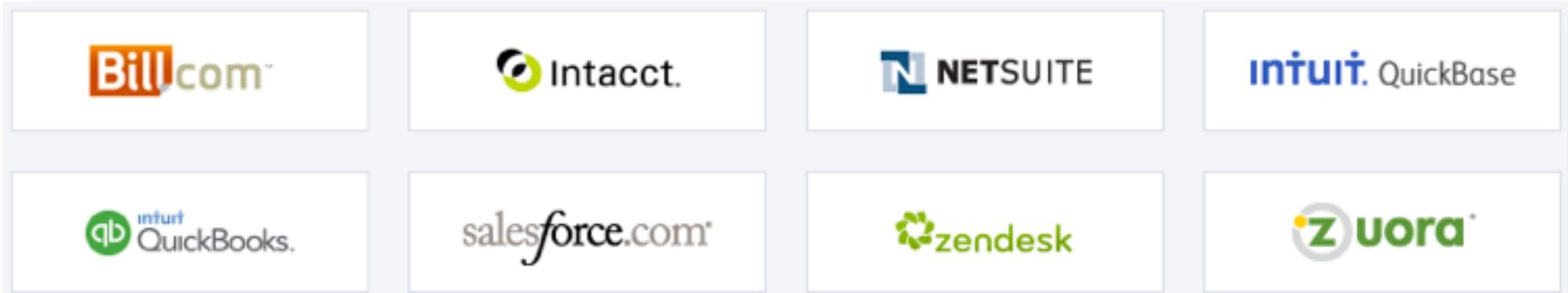
Getting Started

Contents

Connecting your QuickBase app to other cloud apps

Welcome! We know connecting other cloud applications to your QuickBase apps will save you time, eliminate duplicate entry, and provide insight across your business. *So let's get started!*

What services can I connect to?

You can connect to:

Are there other services you'd like to connect to? Please let us know.

ⓘ *You can also connect to folders containing CSV files stored in Box, Dropbox, and Google Drive using QuickBase Sync for CSV.*

How do I connect?

Create a new **connected table**, give us a little info so QuickBase can access your data, and choose the fields you want to connect to your app.

You can filter to connect only the records you care about and set a schedule to automatically refresh the data.

To create a connected table:

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

2. Name the connected table and select an icon to represent the table.
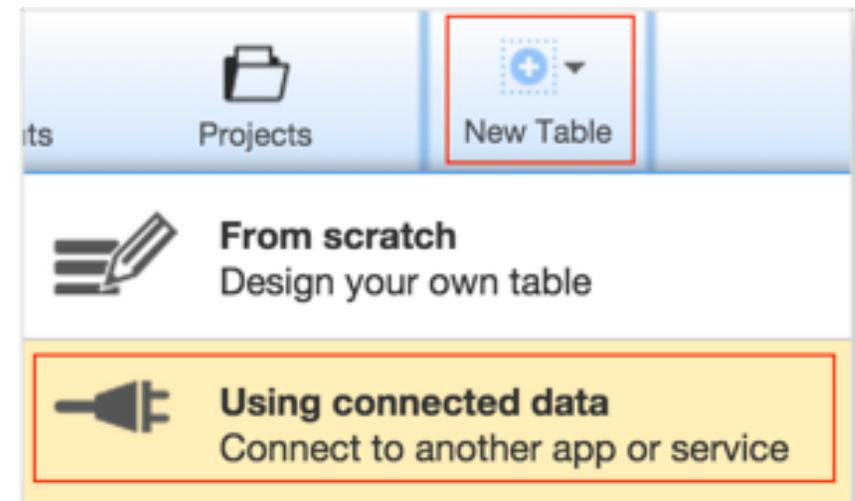
3. Select the service that contains that data you want to add to your QuickBase app, for example, *Salesforce.com*.

4. Accept the connection name, click **Sign in**, and then enter the information required to connect to the service, usually your user ID and password. Data available in the service will display when you are signed in.

5. Select one category of data to connect, for example, *Opportunity*. Depending upon the service, you can choose from data that has been **Optimized** for use with QuickBase or **Advanced** data, as displayed from the service's API. In most cases, **Optimized** data is the best choice for your connected table.
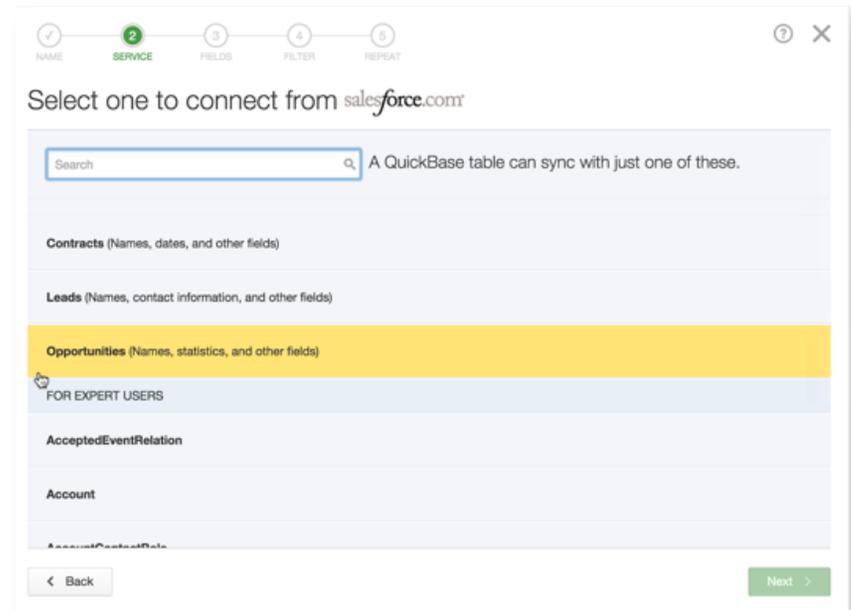
6. Select fields on the left and drag them to the right to include them in your connected table. You can use keyboard shortcuts to move fields.
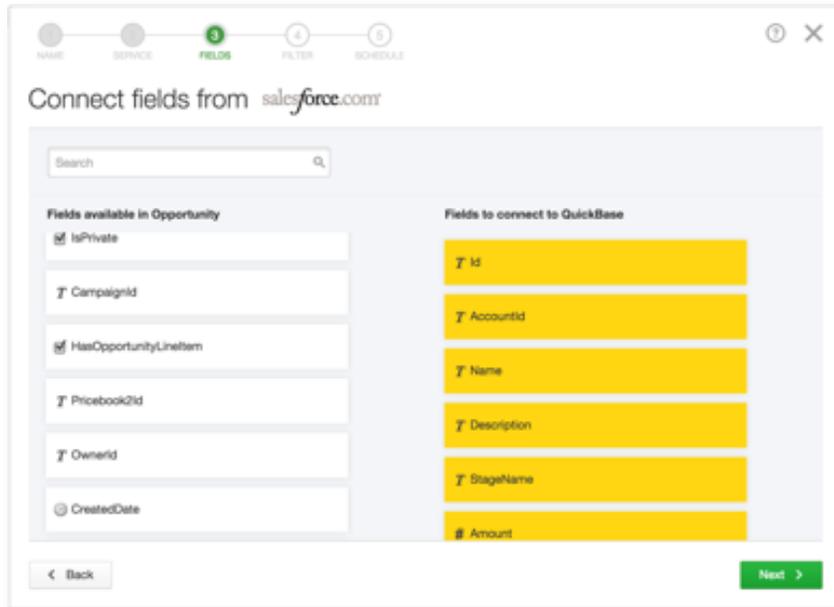
7. Arrange the fields in the order that you want to display the columns in your connected table and then click **Next**.

8. (optional) Define a filter to limit the records that you connect. For example, connect only opportunities that have been closed and won, rather than all opportunities.

9. (optional) Set a schedule to automatically refresh the data in your connected table. You can schedule updates on a weekly, daily, or hourly basis.
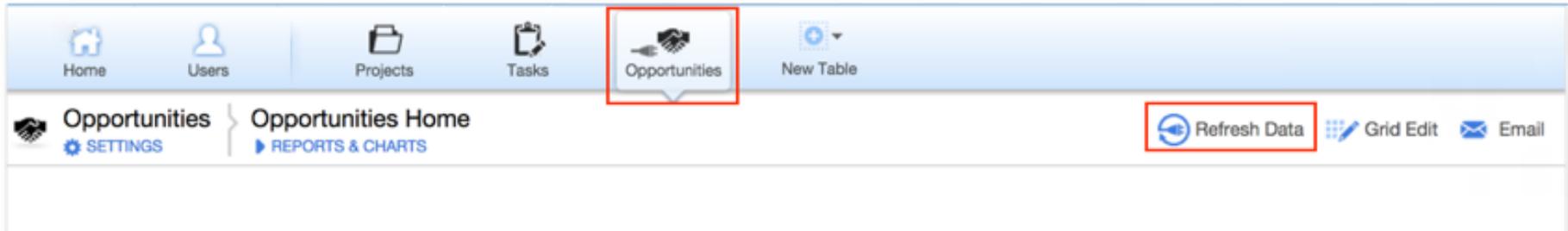
When you're signed in to QuickBase, you can also refresh your table any time; just click the ⟲ **Refresh Data** link on your connected table.

Your connected table displays in the table bar with the ◀ᴇ icon. It may take a moment for QuickBase to display all the records in your connected table.

ⓘ *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.

Working with your connected table

It's easy to modify your connected table to display exactly the data you need. You can add and delete fields, change the filter, and update the refresh schedule.
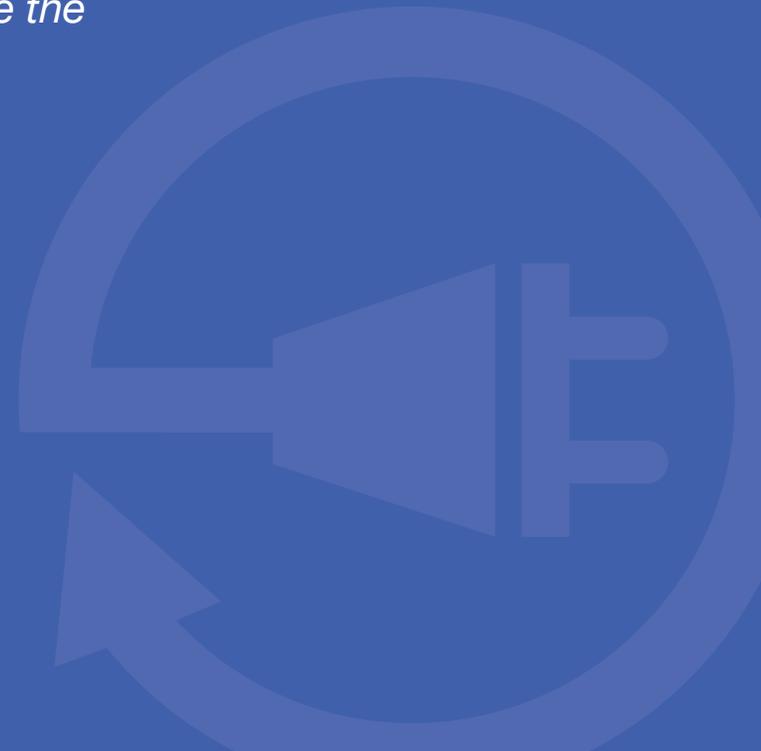
Connecting more fields

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**. Select **Using connected data** and choose the fields you want to add to your connected table.

To see records containing the fields you added, **EXIT SETTINGS** and click 🔄 **Refresh Data**.
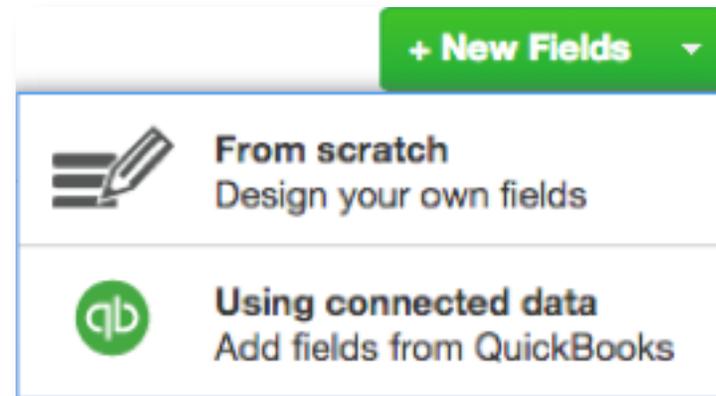
You can also add QuickBase fields to your connected table. These QuickBase fields are associated with the connected record.

Just like with any QuickBase table, you can create relationships among your connected table and other tables.
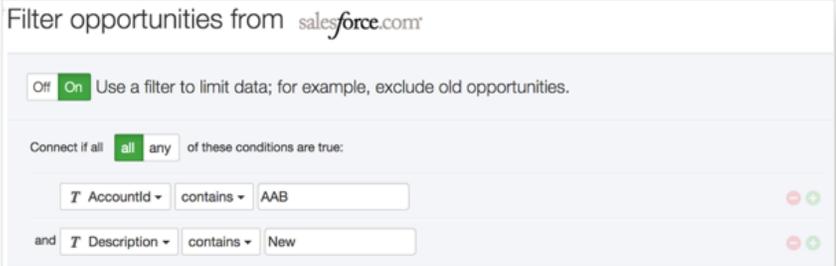
Only the connection owner can add and delete connected fields. Others can add QuickBase fields to a connected table, but can't connect more fields.

Setting or changing a filter

You can set or change the connection filter to determine which records to connect.

1. Open the connected table **SETTINGS** and select **Data connection**.

2. Edit Filter

3. Use the + and – buttons to add and remove criteria from the filter.

Need more info on filtering?
See the *QuickBase Help*.

Using connected data to improve workflows and gain insight

With all your data in QuickBase, you have access to 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 can use connected tables to:

Calculate project ROI	Track detailed customer interactions
Connect QuickBooks Online (QBO) **Invoices & Expenses** and then relate to service projects managed in QuickBase.	Connect Zendesk **Tickets** and then relate to customer projects managed in QuickBase.
Pay the right people at the right time	**Gain visibility into project pipelines**
Connect QBO **Invoices & Payments** and then relate to jobs managed in QuickBase.	Connect Salesforce **Opportunities** and then start onboarding projects in QuickBase.

Track programs & campaigns more efficiently

Connect Salesforce **Accounts** and then relate to partner programs managed in QuickBase.

Connect Salesforce **Contacts** and then related to marketing programs managed in QuickBase.

Proactively address customer payment issues

Connect Zuora **Payments** and then relate to customers managed in QuickBase.

Gain a holistic customer view

Connect QBO **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.

Technical Notes

Connecting to data services

Each data service has different requirements for providing QuickBase with access to your data. 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.

In addition to credentials, some data services also have other requirements:

- **Salesforce.com**: requires that your Salesforce.com account have API access enabled. Your user account must also have the **API Enabled** permission selected.

- **QuickBooks Online**: requires that you are a QuickBooks Online Administrator. QuickBooks Online allows *only one active connection* to a company. If you create a new QuickBooks Online connection to the same company, the prior connection is invalid.

For help while creating a new connected table, click the Help icon ⑦.

Refreshing and relating connected tables

Connected tables are QuickBase tables. Like all QuickBase tables, connected tables automatically include five built-in QuickBase fields: Date Created, Date Modified, Record ID#, Record Owner, and Last Modified By. They also include a refresh key – a field that is unique for each connected recordWhen creating relationships among tables, you can relate only fields of the same field type. In some cases, you may need to create a formula field to create relationships among connected tables and your existing QuickBase tables.

Need help creating relationships? We all do sometimes… please contact us. We're happy to help.

Resources

For more information on working with QuickBase Sync for Cloud Apps:

- Check out *Frequently Asked Questions* about QuickBase Sync for Cloud Apps.

- Access *QuickBase Help*. For help while creating a new connected table, click the Help icon ⓘ.

- Contact us at http://quickbase.intuit.com/support.