



# QB Auto Number

Quick Start & Installation Guide

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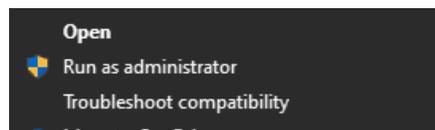
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## Overview

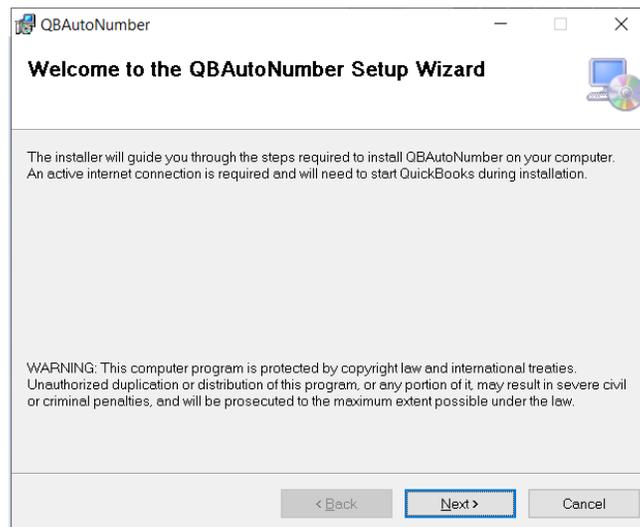
This guide contains the information you will need to get the Growth Forge Consulting QB Auto Number tool installed and configured.

## Quick Start

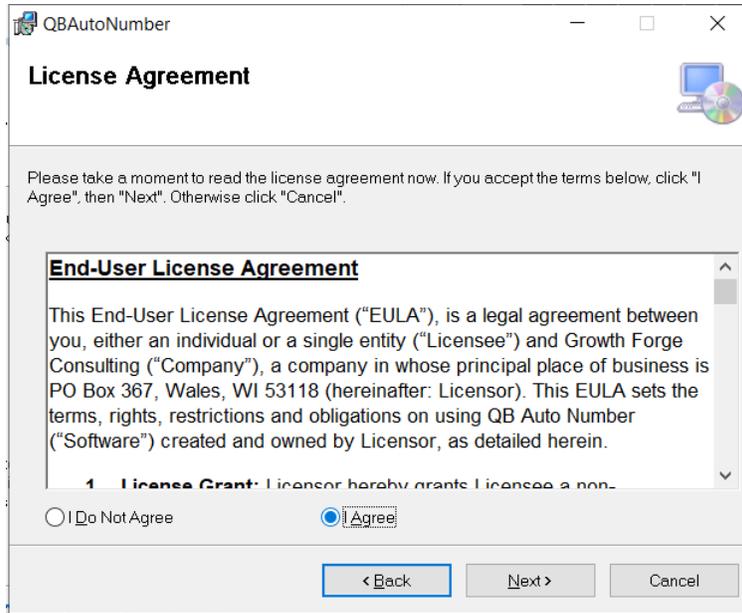
1. Unzip the QBAutoNumber file downloaded from the website into a new directory on your hard drive. (In your Downloads folder for example)
  - a. If you are running an older version of Windows, you may need to download a ZIP tool. A common one is 7-zip, which can be found here: <https://www.7-zip.org/>
2. From the directory you unzipped the files to, right click on the setup.exe program and select "Run as administrator."



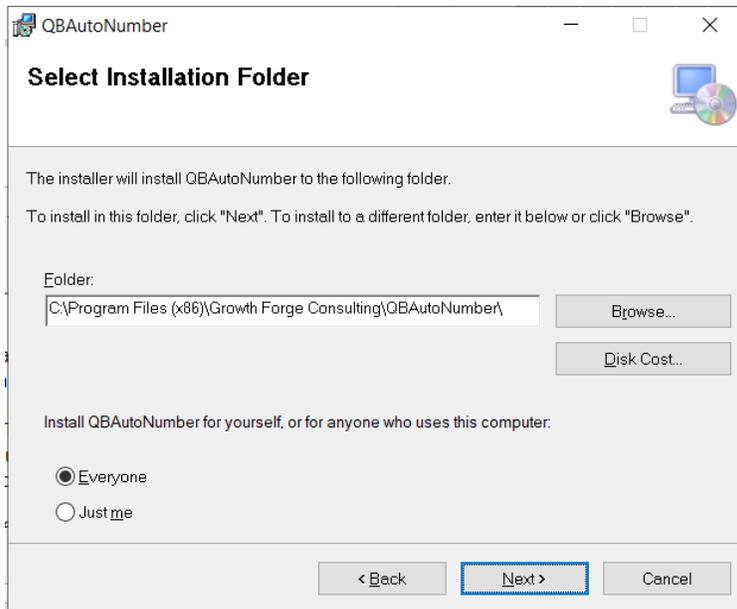
3. If prompted with the question "Would you like to allow this program from an unknown publisher to make changes to your device?" select "Yes."
4. Please read the Welcome screen and click "Next" to continue.



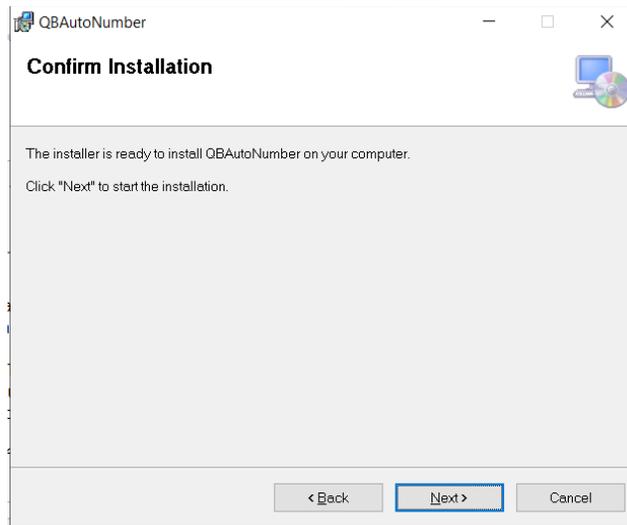
5. Read the End-User License Agreement and select "I Agree" if you agree to it. If not, you may cancel to exit the installation. Click "Next" to continue.



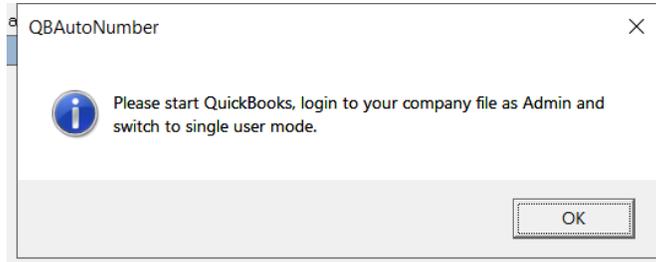
6. Select the location and visibility of the application. In most cases, you should accept the defaults. Click "Next" to continue.



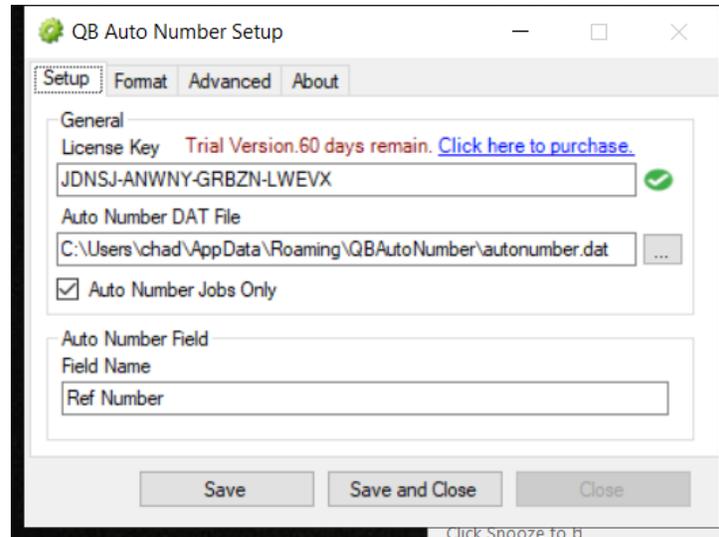
7. Click "Next" to begin the installation.



8. Once you reach this dialog box, follow the directions and open Quickbooks, login to your company file as Admin and switch to single user mode. Once that is complete, click "OK" to continue.



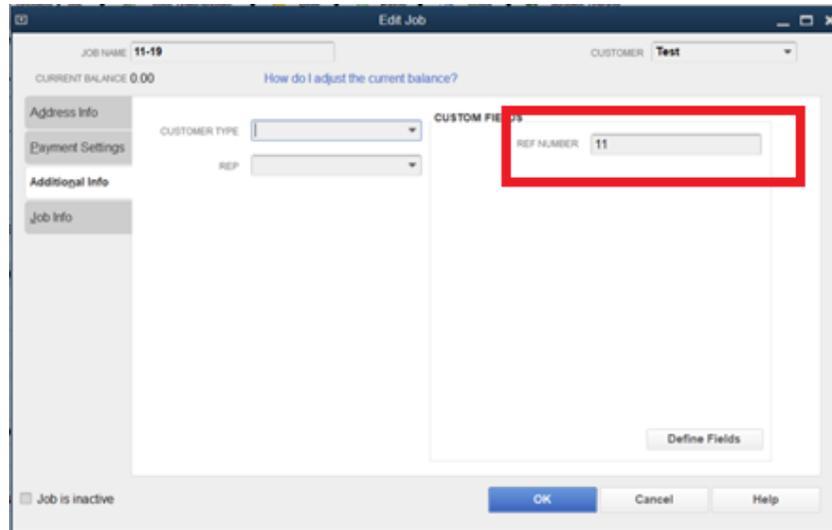
9. The installer will launch the QB Auto Number Setup program. This tool is used to configure the various operational aspects of the program including managing your license key and determining how QB Auto Number formats your jobs.



10. Please verify your License Key shows a valid “Trial Version” key. You will need to purchase a production key after the trial key expires.
11. Ensure the location of the “Auto Number DAT file.” This is the file used to store the current job number. In cases where you will be using QB Auto Number on a single machine, you may accept the defaults. If you plan to use this in a multi-user network configuration, please see the *Verifying the Installation*

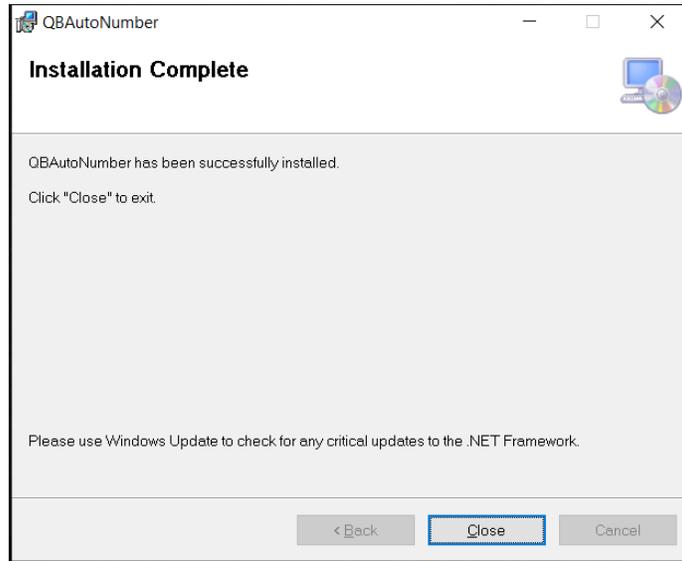
Follow these steps to verify that QB Auto Number installed correctly.

1. From within QuickBooks, navigate to the Customer Center.
2. Add a job to a test client. NOTE: QuickBooks will NOT allow blank job names. You must type something in the Job Name box. A common name is the year or the letter “J.”
3. Click “OK” to add the job.
4. If the default installation was used, QB AutoNumber should change the job name to include the new number. For instance “1-19.”
5. Open the new Job and ensure the “Ref Number” field is contained in “Custom Fields” section on the “Additional Fields” tab.

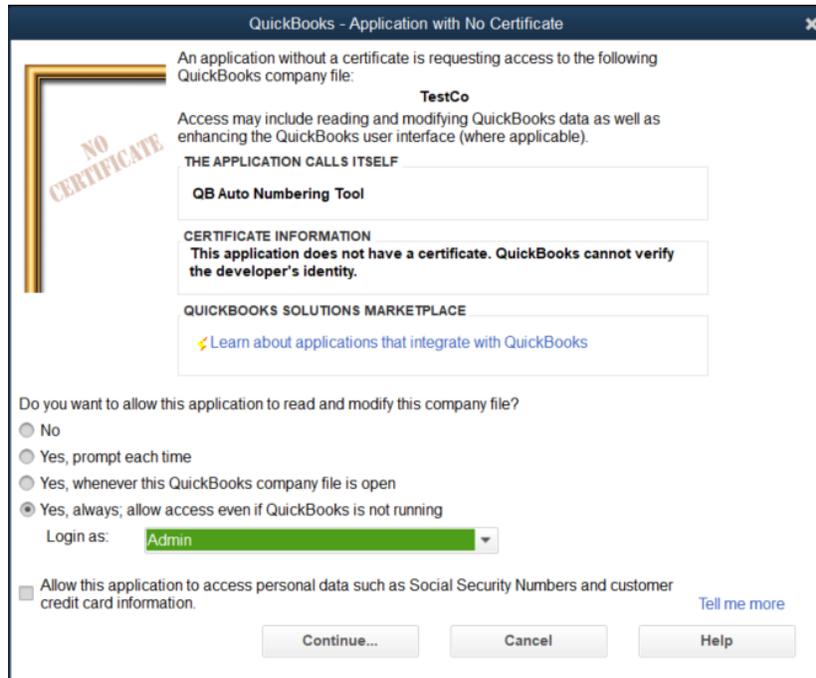


6. If this does not work, refer to the *Troubleshooting* section.

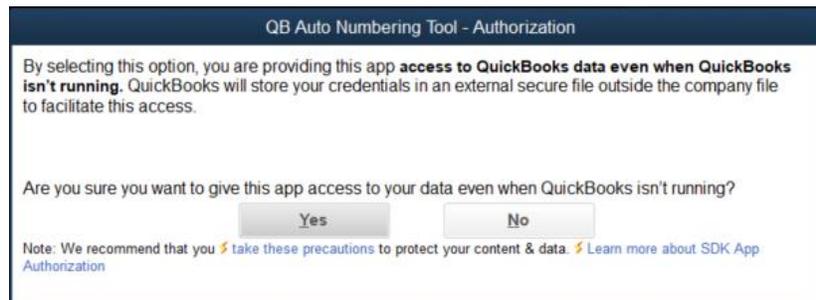
12. Multiuser Network Configuration section.
13. Click "Save and Close" on the bottom of the QB Auto Number Setup tool.
14. Click "Close" on the Installation Complete dialog.



15. Close Quickbooks and restart.
16. Login to your company file as Admin and ensure you are still in single user mode.
17. Once logged in, a dialog will appear asking for your permission to allow the QB Auto Number Tool to interact with Quickbooks. Select “Yes, always allow access even if Quickbooks is not running” and Login as “Admin.”



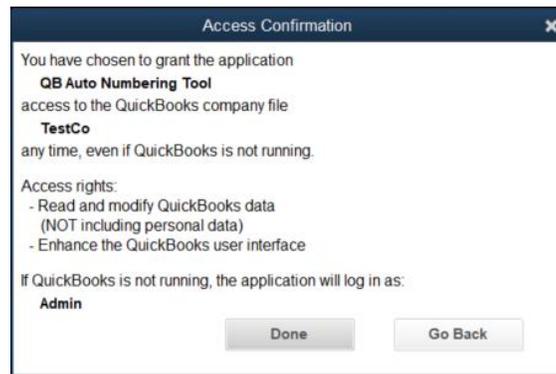
18. You may be prompted for additional confirmation of this access. Select “Yes.”



19. Click “Continue”
20. You may be asked for one final confirmation. Select “Yes”



21. Click “Done” on the “Access Confirmation” dialog.

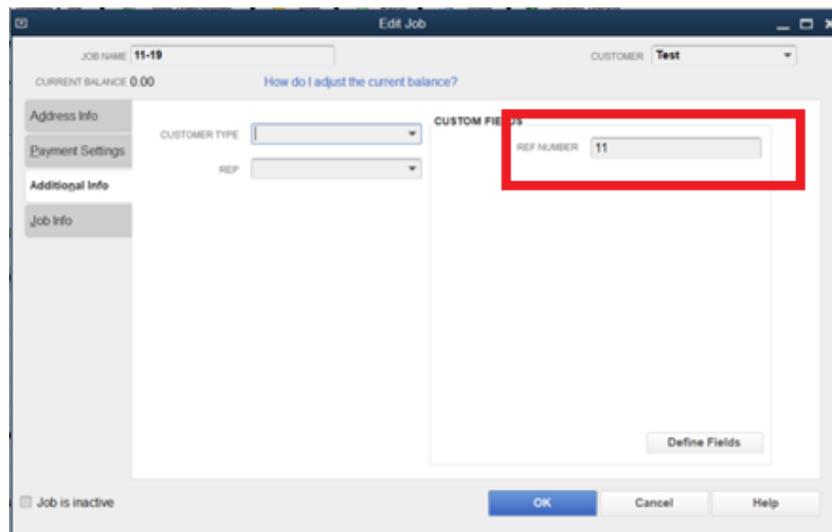


22. QB AutoNumber is now installed. For additional help and validating the install, refer to sections in this guide.

## Verifying the Installation

Follow these steps to verify that QB Auto Number installed correctly.

7. From within QuickBooks, navigate to the Customer Center.
8. Add a job to a test client. NOTE: QuickBooks will NOT allow blank job names. You must type something in the Job Name box. A common name is the year or the letter "J."
9. Click "OK" to add the job.
10. If the default installation was used, QB AutoNumber should change the job name to include the new number. For instance "1-19."
11. Open the new Job and ensure the "Ref Number" field is contained in "Custom Fields" section on the "Additional Fields" tab.

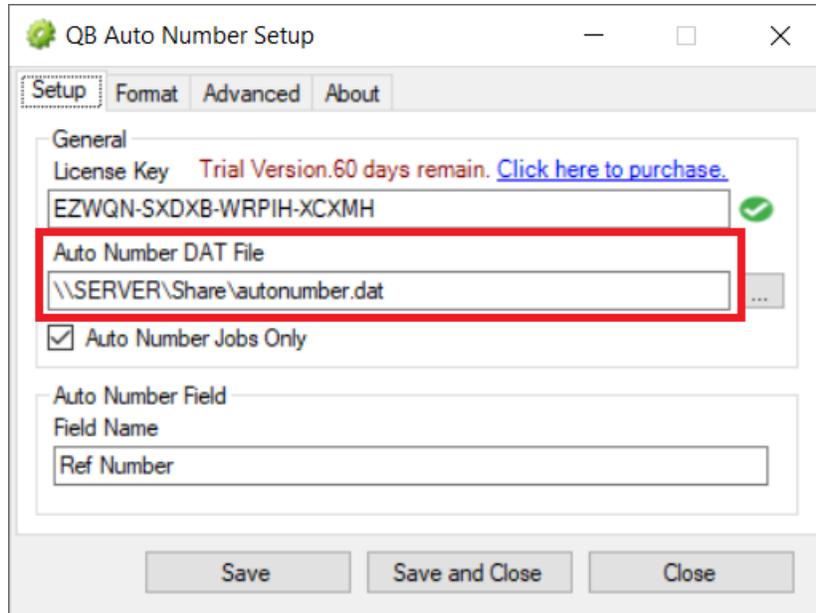


12. If this does not work, refer to the *Troubleshooting* section.

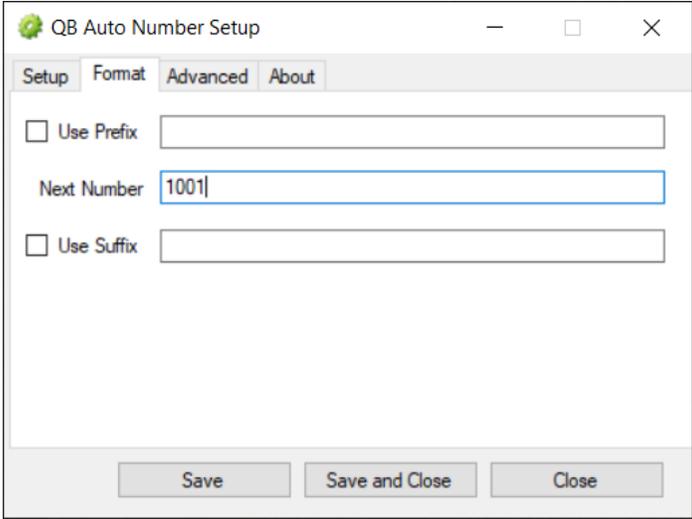
## Multiuser Network Configuration

For simplicity sake, we recommend each computer that will be required to automatically number jobs have QB Auto Number installed. For numbering to be consecutive, each instance must point to a common auto number DATA file. This file stores the last number used by QB Auto Number.

**NOTE: We recommend that you store this file in the same location as your network-based QuickBooks Company file.**



# Additional Settings and Configuration



## Frequently Asked Questions (FAQ)

This section answers a few commonly asked questions.

### Are there additional settings?

Yes. For advanced users, there are a number of settings not visible in the QB Auto Number Setup tool. These settings are contained in the file "QBAutoNumber.exe.config" within the program directory. Opening this file with a text editor reveals the settings below

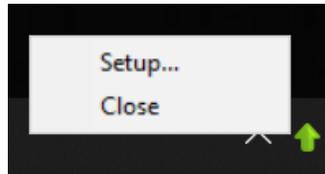
```
<appSettings file="">
  <clear />
  <add key="LicenseKey" value="XXXX-XXXX-XXXX-XXXX" />
  <add key="FieldName" value="Ref Number" />
  <add key="JobsOnly" value="True" />
  <add key="LogToConsole" value="true" />
  <add key="LogToXmlFiles" value="False" />
  <add key="LoggingEnabled" value="False" />
  <add key="LoggingOutput" value="None" />
  <add key="LogFile" value="QBAutoNumber.log" />
  <add key="AutoNumberDatFile" value="\\SERVER\Share\autonumber.dat" />
  <add key="UsePrefix" value="False" />
  <add key="Prefix" value="" />
  <add key="UseSuffix" value="False" />
  <add key="Suffix" value="" />
  <add key="MatchAndCopyRegEx" value="" />
  <add key="AppendJobName" value="False" />
  <add key="AppendJobNameFlip" value="False" />
  <add key="ForceOnAdd" value="False" />
  <add key="NameNumberDelimiter" value="-" />
</appSettings>
```

The main settings not available in the QB Auto Number Setup tool are MatchAndCopyRegEx, AppendJobName, AppendJobNameFlip, ForceOnAdd and NameNumberDelimiter. The description of each of these are as follows.

<b>MatchAndCopyRegEx</b>	
<b>AppendJobName</b>	If True, adds the job number to the job name
<b>AppendJobNameFlip</b>	If True and AppendJobName is True, placed the job number at the beginning of the job name. If False and AppendJobName is True, places job number at the end of the job name. If AppendJobName is False, this setting does nothing.
<b>ForceOnAdd</b>	If True, will ALWAYS set the job number on a newly created job. This is useful if you'd like to try running QB Auto Number on a single computer and have it number jobs for ALL computers running QuickBooks. Use this setting with CAUTION!
<b>NameNumberDelimiter</b>	The character used to separate the job name and job number when AppendJobName is True.

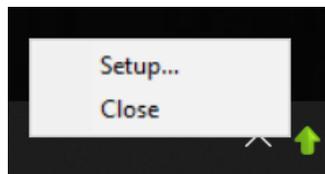
Is there an easy way to access the QB Auto Number Setup tool?

Yes, right click on the QB Auto Number status icon on the lower right side of your screen and select "Setup".



Is there an easy way to close QB Auto Number?

Yes, right click on the QB Auto Number status icon on the lower right side of your screen and select "Close".



Do I need a separate license key for each computer?

No, a single enterprise key can be used on all computers in a single company. Multiple companies require multiple keys.

Can QB Auto Number relate Invoices, Sales Orders, etc. to the Job?

No, not at this time.

## Troubleshooting

This section describes a few solutions to common problems.

I am having trouble generating a log file.

Ensure that the “Authenticated Users” have been granted full access to the QBAutoNumber program folder.

QB Auto Number is “double numbering” my jobs.

Please ensure the numbering configuration is the same on all machines in a multiuser network configuration and ensure the “ForceOnAdd” setting in the QBAutoNumber.exe.config is set to False.

Something went wrong during installation, but QB Auto Number looks like it installed.

Sometime a new version of QuickBooks can create some issues. First, let us know about it so we can try to correct the issue. Secondly, you can attempt to “bind” QB Auto Number to the Quickbooks using the Install Functions on the Advanced tab of the QB Auto Number Setup tool.

