



CLIENT SETUP GUIDE

QuickBooks Online Sandbox Account & API Keys

For DK Organics — Great Plains to QuickBooks Online migration testing

Prepared June 2026 | Estimated time: 30–45 minutes | No paid QBO subscription required

Purpose of this guide

Follow these steps to create a free QuickBooks Online *sandbox* (test company) and generate the API credentials our migration team needs. When finished, submit your credentials at our secure online form: <https://dk-qbo-migration.goodjava.org>

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1. What you are setting up

QuickBooks Online does not use a single static API key. For our migration tool to load data into a test company, we need:

Item	Who creates it	What it does
Intuit Developer account	You (client)	Portal access to create sandboxes and apps
Developer app	You	Generates Client ID & Client Secret
Sandbox company	You	Free test QBO company (like a practice file)
Client ID & Client Secret	You → submit online	App credentials for API access
OAuth authorization	Our team (after keys)	We connect the app to your sandbox — no action needed from you after providing keys

Important

Use **Development** keys only — not Production. Production keys are for live QuickBooks companies and require Intuit approval. This migration will be tested in the sandbox first.

2. Create an Intuit Developer account

Step A — Go to the Intuit Developer portal

Open your browser and navigate to:

<https://developer.intuit.com>

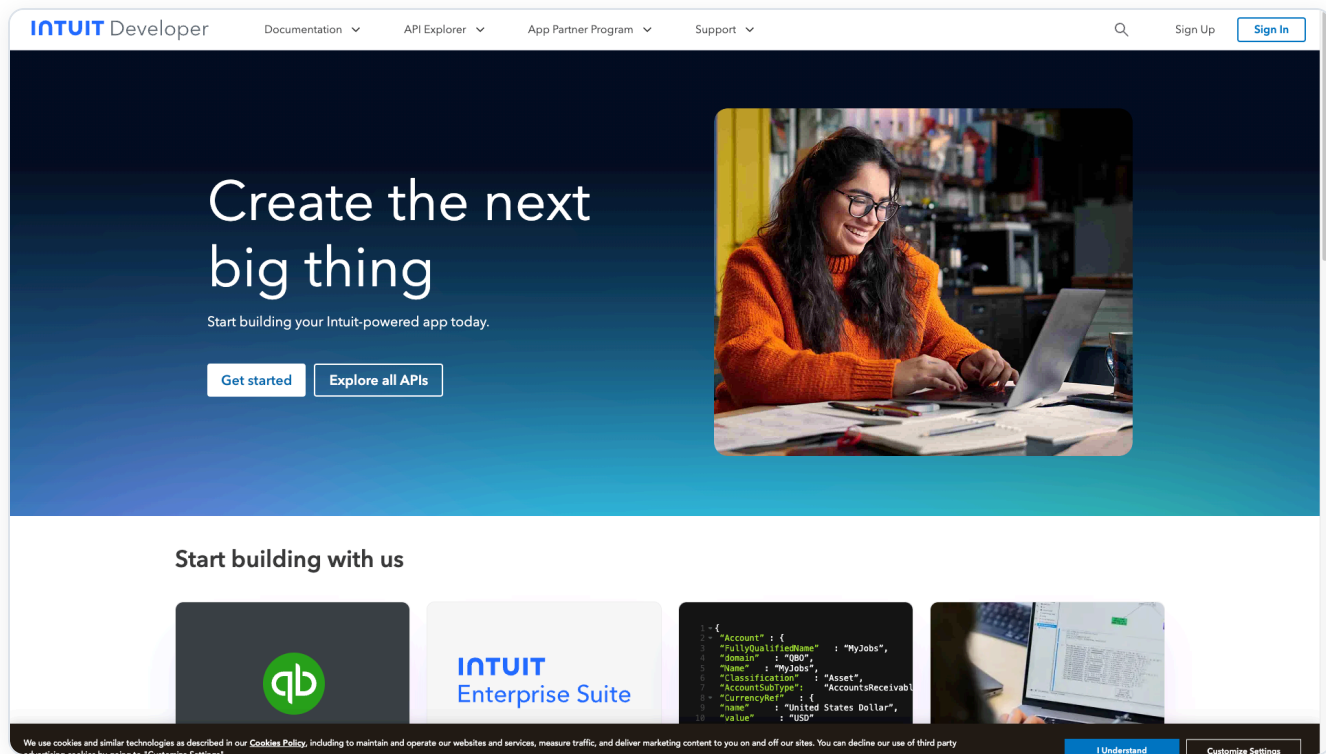


Figure 1 — Intuit Developer homepage. Click **Sign In** (top right) or **Get started**.

Step B — Sign in or create an account

If you already have a QuickBooks, TurboTax, or other Intuit login, you can use it. Otherwise, create a new account.

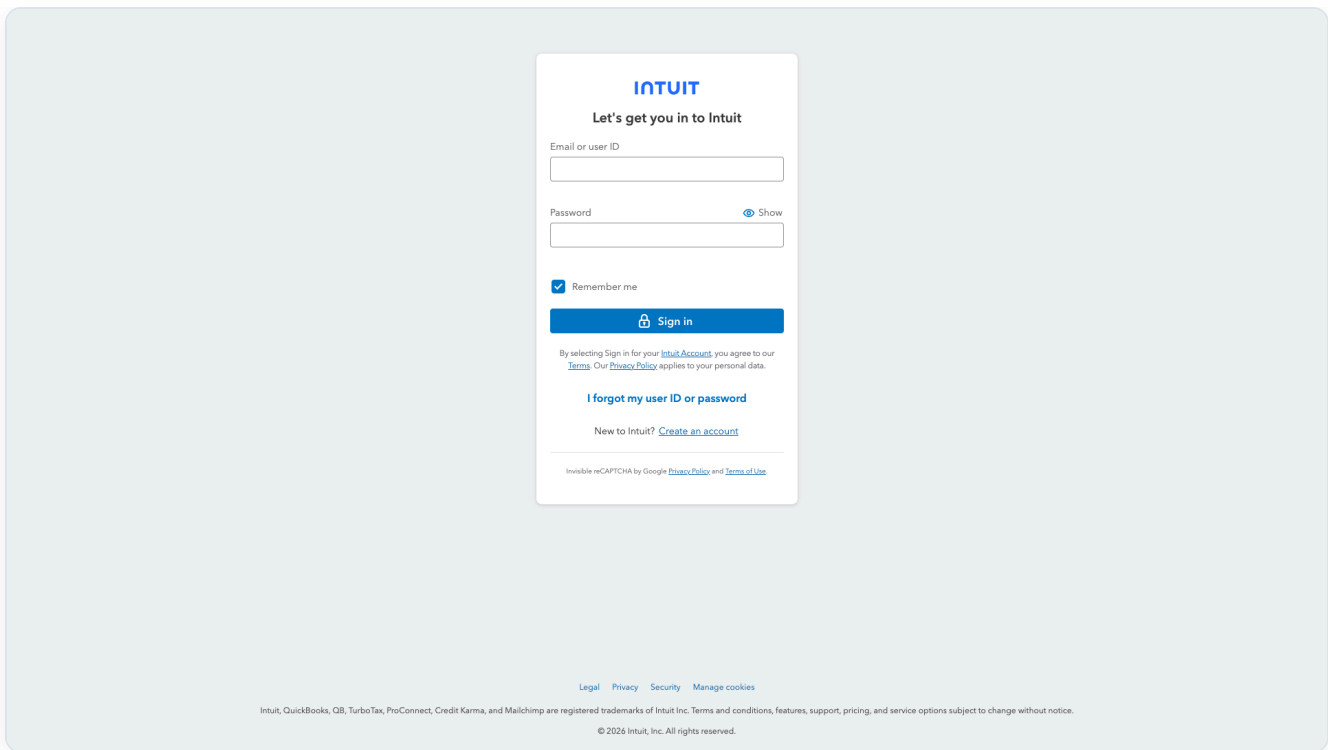


Figure 2 — Sign in with an existing Intuit account.

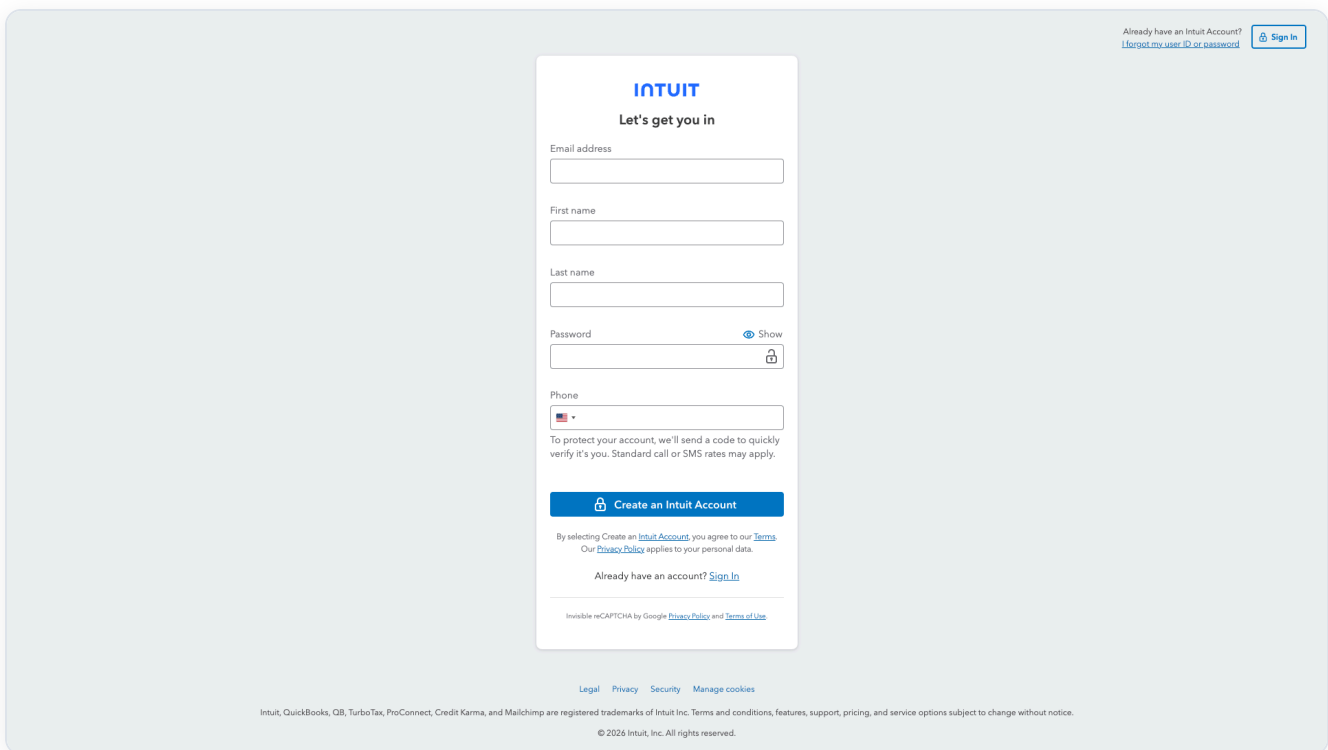


Figure 3 — New users: click **Create an account** and complete the registration form. You may receive a verification code by email or SMS.

- 1 Enter your **email address**, name, password, and phone number.
- 2 Click **Create an Intuit Account** and complete any verification steps.

- 3 When prompted, enter basic **company information** and a **workspace name** (e.g., "DK Organics Migration").

A US sandbox company is created automatically when you finish registration.

3. Create a developer app

The developer app generates the API credentials. You only need one app for this migration.

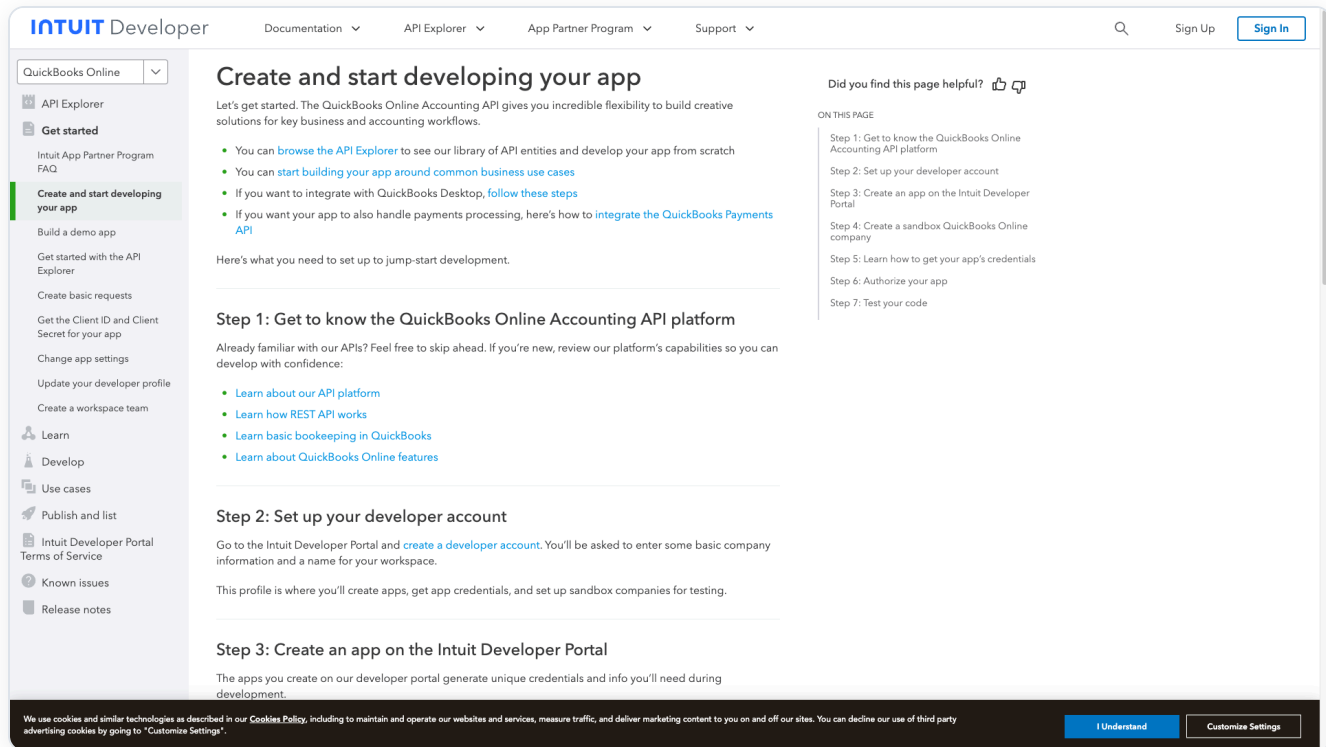
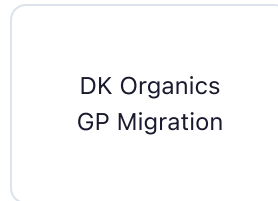
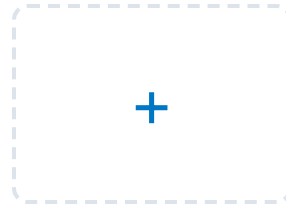


Figure 4 — Official Intuit steps: create developer account → create app → create sandbox → get credentials.

- 1 After signing in, click **My Hub** (upper-right corner) → **App dashboard**.
- 2 Click the **+** card to **Create an app**.
- 3 Select **QuickBooks Online and Payments**.
- 4 Name the app: **DK Organics GP Migration** (or similar).
- 5 When asked for **scopes**, select **Accounting** only.
Scope name: `com.intuit.quickbooks.accounting` — required for chart of accounts, customers, vendors, invoices, and bills.
- 6 Complete any remaining setup prompts.

App Dashboard — what you'll see after signing in

Your apps appear as cards. Click the + card to create a new app.
After creation, click your app name to open its settings.



4. Create & prepare the sandbox company

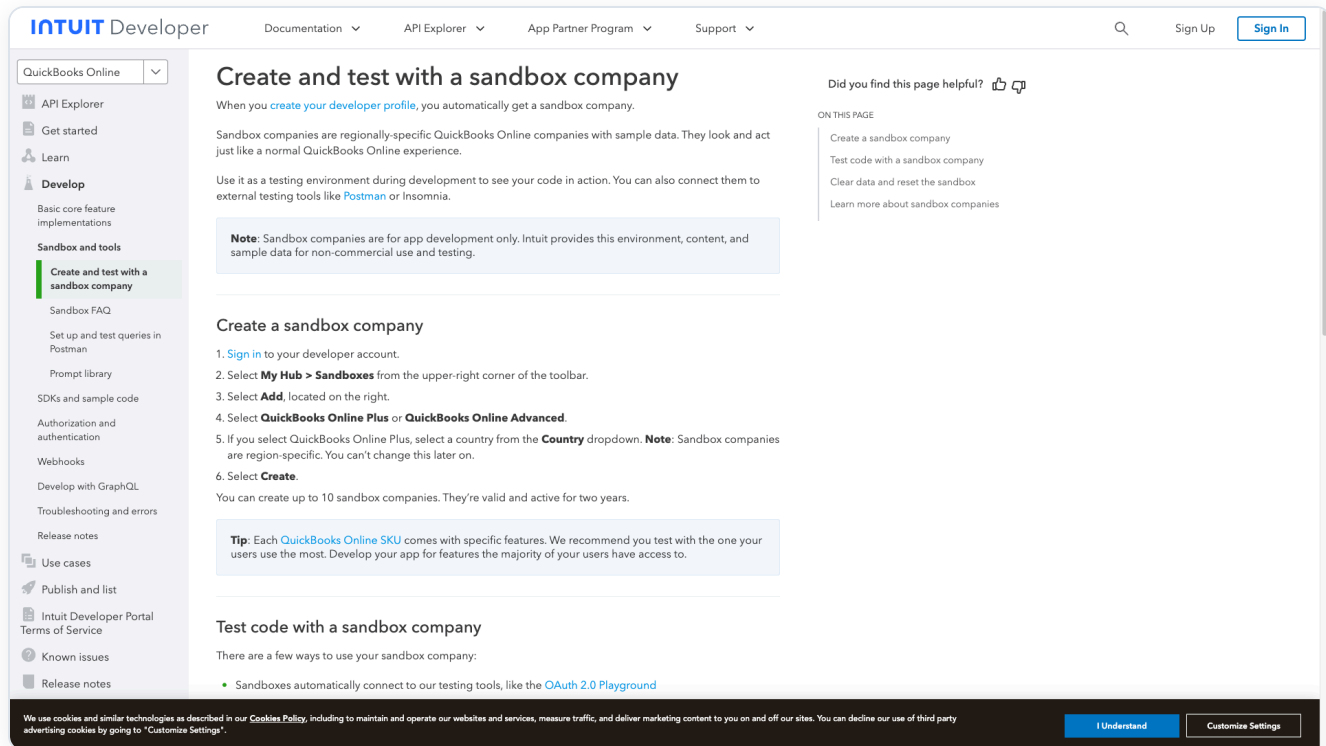


Figure 5 — Official Intuit instructions for creating a sandbox company.

Verify or create your sandbox

- 1 Click **My Hub** → **Sandboxes**.
- 2 You should see at least one sandbox (created automatically at registration).
- 3 To create an additional sandbox: click **Add** → select **QuickBooks Online Plus** → choose **United States** → click **Create**.

Choose United States

DK Organics uses USD. The sandbox country cannot be changed after creation. Select **QuickBooks Online Plus** and **United States**.

Clear sample data before migration testing

The sandbox ships with sample customers, vendors, and transactions. Before we load your real GP data, clear it:

- 1 In the Sandboxes list, find your US sandbox company.

2 Click **Clear data and reset** in the Actions column.

3 Confirm the reset.

This wipes all data but keeps the sandbox company and its ID intact.

5. Get your API keys (Client ID & Client Secret)

The screenshot shows the Intuit Developer portal. The main heading is "Get the Client ID and Client Secret for your app". Below the heading, it explains that apps created on the Intuit Developer Portal receive a unique set of credentials: a client ID and a client secret. It states that these credentials are used for authorization and connecting apps to third-party testing tools. Each app has two sets of credentials: one for live production code and another for sandbox and testing environments.

The page includes a section titled "Get your app's credentials" with a numbered list of steps:

1. [Sign in](#) to your developer account.
2. Select **My Hub > App dashboard** from the upper-right corner of the toolbar.
3. Select and open an app.
4. Select **Keys and credentials** from the left navigation pane.
5. If you're connecting a [sandbox company](#), choose **Development** and turn on the **Show credentials** switch.
6. If you're setting up a production app, choose **Production** and turn on the **Show credentials** switch.
7. Copy the **Client ID** and **Client secret**.

A note box states: "Note: The client ID and client secret will be accessible only after completing the Production Key questionnaire and its approval. For apps without a completed questionnaire, the questionnaire will be visible when you select **Production** in Step 6."

A tip box states: "Tip: Remember, the client ID and client secret for **Production** work only for live, in-production apps. Those for **Development** are only for your sandbox companies."

The page also features a sidebar with navigation options, a search bar, and a "Sign In" button. At the bottom, there is a cookie consent banner with "I Understand" and "Customize Settings" buttons.

Figure 6 — Official Intuit instructions for retrieving Client ID and Client Secret.

- 1 Go to **My Hub** → **App dashboard**.
- 2 Open your app (**DK Organics GP Migration**).
- 3 In the left sidebar, click **Keys & credentials**.
- 4 Select the **Development** tab (not Production).
- 5 Toggle **Show credentials** ON.
- 6 Copy the **Client ID** and **Client Secret**.

[Dashboard](#)**[Keys & credentials](#)**[Settings](#)[Webhooks](#)

Keys & credentials

Development

 Show credentials ON

Client ID (copy this)

ABcd1234eFgHiJkLmNoPqRsTuVwXyZ1234567890

Client Secret (copy this — treat like a password)

abcDEFghiJKL1234567890

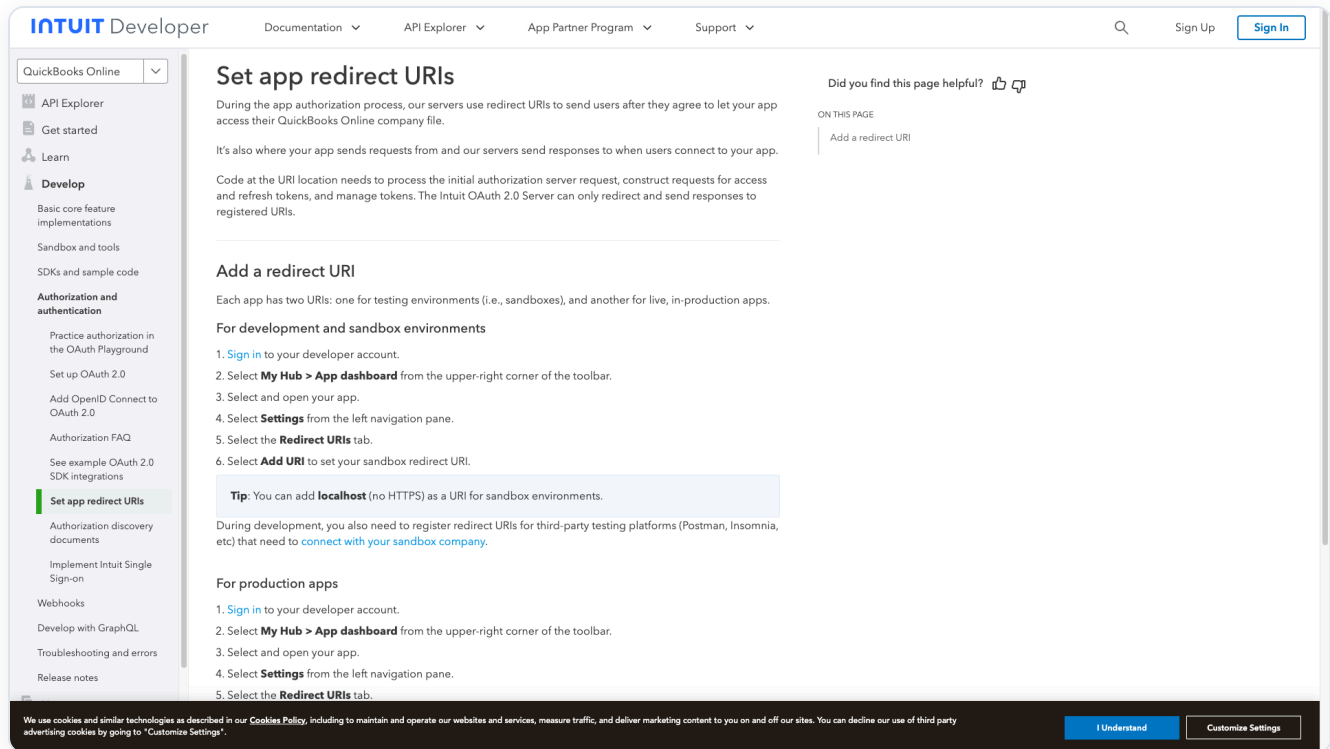
⚠ Do NOT use the Production tab for sandbox testing.

Security

The Client Secret is sensitive. Share it only through a secure channel (encrypted email, password manager share, or secure file transfer). Do not post it in Slack, text message, or unencrypted email.

6. Configure the redirect URI

Our migration tool uses OAuth 2.0 to connect to your sandbox. This requires a redirect URI registered in your app settings.



The screenshot shows the Intuit Developer documentation page for 'Set app redirect URIs'. The page is titled 'Set app redirect URIs' and includes a navigation sidebar on the left with categories like 'API Explorer', 'Get started', 'Learn', and 'Develop'. The main content area explains that during app authorization, servers use redirect URIs to send users after they agree to let your app access their QuickBooks Online company file. It also notes that code at the URI location needs to process the initial authorization server request, construct requests for access and refresh tokens, and manage tokens. The page is divided into two main sections: 'Add a redirect URI' and 'For production apps'. The 'Add a redirect URI' section includes a list of steps: 1. Sign in to your developer account. 2. Select My Hub > App dashboard from the upper-right corner of the toolbar. 3. Select and open your app. 4. Select Settings from the left navigation pane. 5. Select the Redirect URIs tab. 6. Select Add URI to set your sandbox redirect URI. A tip box states: 'Tip: You can add localhost (no HTTPS) as a URI for sandbox environments.' The 'For production apps' section includes a list of steps: 1. Sign in to your developer account. 2. Select My Hub > App dashboard from the upper-right corner of the toolbar. 3. Select and open your app. 4. Select Settings from the left navigation pane. 5. Select the Redirect URIs tab. At the bottom of the page, there is a cookie consent banner with 'I Understand' and 'Customize Settings' buttons.

Figure 7 — Official Intuit instructions for setting redirect URIs.

- 1 In your app, click **Settings** in the left sidebar.
- 2 Select the **Redirect URIs** tab.
- 3 Under **Development**, click **Add URI**.
- 4 Enter exactly: **http://localhost:8000/callback**
- 5 Click **Save**.

Redirect URIs — Development

Redirect URI (type exactly as shown)

```
http://localhost:8000/callback
```

No `https://` — localhost is allowed for Development/sandbox only. No trailing slash.

Why localhost?

Our migration software runs the OAuth authorization on a local machine during setup. This URI tells Intuit where to send the authorization code. You do not need to install anything — our team handles this step after receiving your keys.

7. Submit your credentials

When you have completed all steps above, submit your sandbox credentials using our secure online form. Your answers are sent directly to the migration team by email.

CREDENTIALS SUBMISSION FORM

<https://dk-qbo-migration.goodjava.org>

Open this link in your browser, fill in your Client ID, Client Secret, and setup details, then click **Submit credentials securely**.

What you'll need to enter

- Your name and contact email
- Intuit Developer account email
- App name and sandbox company name
- **Client ID** and **Client Secret** (Development keys)
- Confirmation that the redirect URI is set and sandbox data has been cleared

Security note

The form is transmitted over HTTPS. The Client Secret is sensitive — only submit if you are comfortable sending it this way.

What happens next (our team's steps)

After receiving your credentials, the migration team will:

1. Configure the migration tool with your Client ID and Client Secret
2. Run the OAuth authorization to connect to your sandbox
3. Extract data from Microsoft Dynamics GP (read-only)
4. Load chart of accounts, customers, vendors, items, and open balances into the sandbox
5. Run reconciliation reports for your review

You do **not** need to provide access tokens — we generate those during OAuth setup.

8. FAQ & troubleshooting

Do I need to pay for QuickBooks Online?

No. Sandbox companies are free and provided by Intuit for development and testing. No credit card is required.

Can I use my existing QuickBooks Online login?

Your live QBO company login is separate from the developer sandbox. You need an **Intuit Developer** account (free). If you already have any Intuit account (QuickBooks, TurboTax, etc.), you can sign in with that same email.

What's the difference between Development and Production keys?

	Development	Production
Used with	Sandbox test companies	Live QBO companies
Cost	Free	Requires live QBO subscription
Approval needed	No	Yes — Intuit app assessment
For this project	Use now	Only after sandbox validation

Can we copy our live QBO data into the sandbox?

No. Intuit does not support copying production data to sandbox. The sandbox starts empty (after clearing sample data) and we load your GP data into it via the API.

How long does the sandbox last?

Sandbox companies are valid for **2 years**. You can create up to 10 sandboxes per developer account.

I can't find "Keys & credentials"

Make sure you've opened your **app** (not just the dashboard). Keys & credentials is in the left sidebar after you click into the app.

The redirect URI won't save

Check for typos. It must be exactly `http://localhost:8000/callback` — no `https`, no trailing slash, no extra spaces. Make sure you're adding it under **Development**, not Production.

Who do I contact for help?

For Intuit portal issues: help.developer.intuit.com

For migration questions: contact your DK Organics migration team.