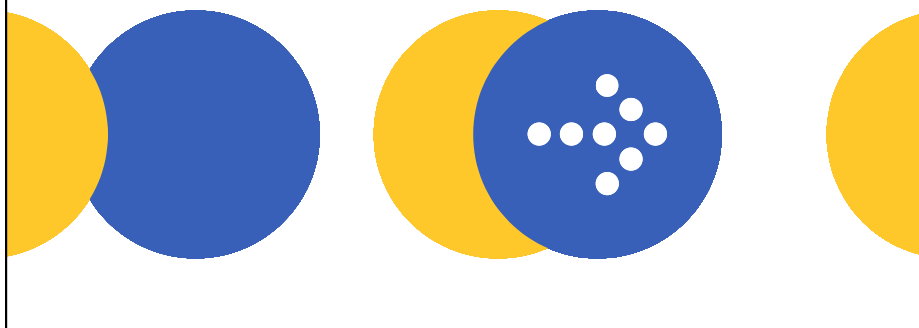


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Preparing for Upgrade to the New QuickBase

Robert McDonald, QuickBase Product Manager



Timeline

The diagram shows a horizontal timeline with four key events marked by circles: 'Account Migration' (white), 'Cutover' (orange), and 'Deadline XX/XX/XX' (black). A red arrow labeled 'YOU ARE HERE' points to a target icon on the timeline, indicating the current position. A blue shaded area labeled 'Transition Period' spans from the start to the 'Cutover' event.

During Transition Period

- Initially, only application managers and account/realm admins are exposed the new QuickBase
- App managers may share access to the new QuickBase by forwarding the Account URL or through in-product invite mechanism
- Links in automated emails, i.e. notifications, subscriptions and reminders, continue to refer back to www.subdomain until final cutover
- API calls may be made through www.quickbase.com and/or your new Account URL
- Application or data changes made through either UI affect the live app schema and/or data

After Cutover

- New QuickBase UI by default for all users accessing applications owned by your Account
- Sign-ins at www.quickbase.com are automatically redirected to new Account URL
- All API access to your applications through www.quickbase.com will be blocked

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PRODUCT EXPERIENCE

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Transition Experience

Make your upgrade to the new QuickBase a success!

- 1. Explore the new QuickBase**
 - Read about What's New and Changed
 - Invite users to preview
- 2. Prepare for the upgrade**
 - Get answers to your upgrade questions
 - Check this app for upgrade issues
- 3. Contact your account admin**
 - Let your account admin know the status of this app:
 - Email your account admin

Back to old QuickBase

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Role-specific Footers

Make your upgrade to the new QuickBase a success!

App Manager/Admin Footer

Account/Realm Admin Footer

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Upgrade Resources

Make your upgrade to the new QuickBase a success!

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 - Let your account admin know the status of this app.
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Back to old QuickBase

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Upgrade Resources

Upgrading to the New QuickBase
Everything you need for a successful upgrade

What is the New QuickBase?

Our upcoming QuickBase release is different from our other releases. We've worked hard to give QuickBase a new, streamlined UI - and that means a lot of changes for you, our customers.

- New, streamlined navigation
- Instant filtering and searching
- Instant mobile apps, with no coding
- Unique account URLs
- Unified help search and product access in the QuickBase Community

Overviews from our QuickBase team:

- The New QuickBase
- The Redesign
- Table home pages
- QuickBase Community

Why is this release different?

This release gives you a chance to preview the changes with your data and your date. Then decide when to migrate to the new UI. We'll only activate the new UI on a date you choose. If you're a user in some other role, you'll need to be invited in.

During the preview, you can:

- Backup and sync between the old QuickBase and the new QuickBase
- See the **UPGRADE** link on your data
- Get familiar with the changes, and preview **What's New and Changed** for your app
- Invite your app admins and users to the preview
- Decide when to permanently upgrade to the new QuickBase

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PREPARING YOUR APPS FOR YOUR NEW ACCOUNT URL

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The QuickBase API

Two possible ways to make API requests

- An XML request string POSTed to QuickBase

```
POST https://<TARGET DOMAIN>/db/<TARGET_DBID>
Content-Type: application/xml
Content-Length:
QUICKBASE-ACTION:API_AddField
<qdbapi>
  <label>label</label>
  <type>type</type>
  <ticket>ticket</ticket>
  <apptoken>app token</apptoken>
  <udata>whatever</udata> <!--optional pass-thru data -->
</qdbapi>
```

- As a URL sent in a GET request, e.g. sent from a browser, embedded in a web page, etc.

```
https://<TARGET DOMAIN>/db/<TARGET_DBID>?a=API_AddField&label=label&...
```

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API Requests Fall Into 3 Categories

Categories based on the TARGET_DBID of request

Main-handlers

- API_Authenticate
- API_SignOut

TARGET_DBID = db/main

App Handlers

- API_AddReplaceDBPage
- API_GetDBPage
- API_GetDBvar
- API_SetDBvar
- API_CreateTable
- API_CloneDatabase
- API_CreateDatabase
- API_DeleteDatabase
- ...

TARGET_DBID = Appld,
Ex. *db/bhsaqwwpr*

Table Handlers

- API_AddField
- API_DeleteField
- API_FieldAddChoices
- API_FieldRemoveChoices
- API_SetFieldProperties
- API_SetKeyField
- API_AddRecord
- API_ChangeRecordOwner
- ...

TARGET_DBID = TableId
Ex. *db/bhsaqwwqa*

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Customizations Impacted by Account URL

Eternal API Calls

Internal Scripts or Links

UI Customizations

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API Calls from External Sources

- Common sources include web forms, server-side scripts, 3rd-party applications, etc.
- External scripts must be updated to:
 - Authenticate against your new Account URL
 - Direct API requests to your new Account URL
- If your scripts include a hard-coded ticket, you must update your script with a new ticket generated against your Account URL
- 2 ways to update API calls for new Account URL
 - Change the <TARGET_DOMAIN> of each request to Account URL
 - Pass <realmhost>Account URL</realmhost> parameter with each request



Changes to external scripts can/should be updated during the transition period, and **must** be completed prior to cutover

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Changing TARGET_DOMAIN through SDKs

SDK	
Java	<pre>QuickBaseClient qc = new QuickBaseClient("testuser@intuit.com", "password", "acmecorp.quickbase.com");</pre>
Javascript	<pre>var qdb = new QuickBaseClient("acmecorp.quickbase.com");</pre>
Perl	<pre>\$qdb = HTTP::QuickBase->new('https://acmecorp.quickbase.com/db');</pre>
VB	<pre>Dim QDB As QuickBaseClient.QuickBaseClient QDB = New QuickBaseClient.QuickBaseClient QDB.setServer("acmecorp.quickbase.com", True)</pre>
PHP	<pre>QuickBase(uname,pwd,usexml,db,apptoken,realm,hours) QuickBase(testuser@intuit.com,password,true,"", "", "acmecorp",10)</pre>

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App Troubleshooting Tools

▼ Make your upgrade to the new QuickBase a success!

1. Explore the new QuickBase

- Read about What's New and Changed
- Invite users to preview

Back to old QuickBase

2. Prepare for the upgrade

- Get answers to your upgrade questions
- Check this app for upgrade issues**

3. Contact your account admin

Let your account admin know the status of this app:

- Email your account admin

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Identifying API Calls from External Sources

These are all the API calls to this app via www.quickbase.com. You should fix the external sources generating these calls so they use your new URL, https://robert-mcdonald-account.qblab-e2e.corp.intuit.net, then click off each one in the table below.

Save as a spreadsheet

QuickBase table	User agent	Source	API user	Last accessed	Fixed?
Tasks	Mozilla/5.0 (Macintosh; Intel Mac OS X 10_7_4) AppleWebKit/537.	External browser script	Robert_McDonald@intuit.com	2012-08-24 17:35:21	✓
Projects	Mozilla/5.0 (Macintosh; Intel Mac OS X 10_7_4) AppleWebKit/537.	External browser script	Robert_McDonald@intuit.com	2012-08-24 17:30:21	✓

Page 1 of 1

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Processing External Script Issues

- Note the Last Accessed date/time
- Identify source of external script using user agent/source columns
- Update script to redirect API calls to new Account URL
- Initiate new API call through external script
- Verify Last Accessed date/time to confirm success (Note: 15 min lag)
- Click the checkmark in the appropriate row(s) to update application status rollout

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In-app Scripts and Links

Usually found in dashboard, dbPages, URL fields

- APIs or links where the <TARGET_DBID> equals **main** are called main handler. Examples include:
 - **API_Authenticate**, **API_GrantedDbs**, **API_CreateDatabase**
 - **https://www.quickbase.com/db/main?a=myqb**
- In-app scripts and links with absolute links to main handlers, i.e. **www.quickbase.com/db/main?...** must be modified to make the links relative. For example:
 - **https://www.quickbase.com/db/main?a=myqb** becomes **/db/main?a=myqb**
- Most other browser-based calls will automatically be redirected after the cutover. Examples include:
 - Browser bookmarks
 - HTML links to APIs or pages where <TARGET_DBID> is not equal to **main**, such as **API_Addrecord**, **API_GenResultsTable**, etc.



Absolute links to main handlers can/should be updated during the transition period, and **must** be completed prior to cutover

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Identifying In-App Scripts or Links

The screenshot shows a web browser displaying a list of in-app scripts or links. The browser address bar shows the URL: `https://intuitcorp.quickbase.com/db/bb18t8urmk7a=AppScriptingIssues`. The page title is "QuickBase Partner Opportunity Tracker Settings". The browser's developer tools are open, showing the "Issues" tab. A table lists the issues, with callouts pointing to specific columns:

- Location:** Points to the "Where" column.
- Type:** Points to the "What" column.
- Object:** Points to the "Details" column.

The table content is as follows:

Where	What	Details
QuickBase Partner Opportunity Tracker	Dashboard: Sales Manager - Pipeline Management (Page)	Chart iframe
Activities	Meeting Scheduler (Form)	Link

At the bottom of the page, there is a footer: "Intuit|Proprietary & Confidential" and the Intuit logo.

HTML Link in App Custom Header

Link to main handler URL in an HTML hyperlink

```
<a href="https://www.quickbase.com/db/main?a=myqb">My QuickBase</a>
```

Make the URL relative by removing `https://www.quickbase.com` from the href attribute.

```
<a href="/db/main?a=myqb">My QuickBase</a>
```

Absolute links in Formulas

Absolute reference to main handler in a Formula field or a custom column in a report.

```
"https://www.quickbase.com/db/main" & "?act=API_Authenticate"
```

Replace https://www.quickbase.com with the URLRoot() formula function.

```
URLRoot() & "db/main" & "?act=API_Authenticate"
```

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Absolute Links in Scripts

Absolute URL in HTML script in a code page, or in a text section of a dashboard (app Home page).

```
function getApps() {
$.ajax({
  "type": "POST",
  "contentType": "text/xml",
  "url": "https://www.quickbase.com/db/main?a=API_GrantedDBs"});
return false;
}
```

Make the URL relative by removing https://www.quickbase.com

```
function getApps() {
$.ajax({
  "type": "POST",
  "contentType": "text/xml",
  "url": "/db/main?a=API_GrantedDBs"});
return false;
}
```

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Account-Level Rollup

Make your upgrade to the new QuickBase a success!

1. Explore the new QuickBase

Read about What's New and Changes

Back to old QuickBase

2. Prepare for the upgrade

Get answers to your upgrade

View status for all apps

3. Upgrade your account

When you're ready to permanently switch your team to the new QuickBase

Complete the upgrade

The screenshot shows the 'Upgrade Center' in QuickBase. At the top, there are three steps: 1. Explore the new QuickBase, 2. Prepare for the upgrade, and 3. Upgrade your account. A red circle highlights the 'View status for all apps' link in step 2. Below this is a screenshot of the 'Manage Billing Account' page, which displays a table of app statuses. The table has columns for App name, App manager, Last modified, and Status. The status column shows icons for 'Looks good on', 'Needs attention', and 'Not checked yet'.

App name	App manager	Last modified	Status
BR PROJECT MANAGER	Test User	2012-09-25 11:30:21	Not checked yet
Manage Your Sales Team	Robert McDonald	2012-10-22 19:48:01	Not checked yet
Migration Test App	Robert McDonald	2012-10-22 19:48:01	Looks good on
Project Manager Plus	Robert McDonald	2012-10-22 19:48:01	Needs attention

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Application Status

The screenshot shows the 'Upgrade Center' in QuickBase, displaying a table of app statuses. The table has columns for App name, App manager, Last modified, and Status. The status column shows icons for 'Looks good on', 'Needs attention', and 'Not checked yet'.

App name	App manager	Last modified	Status
BR PROJECT MANAGER	Test User	2012-09-25 11:30:21	Not checked yet
Manage Your Sales Team	Robert McDonald	2012-10-22 19:48:01	Not checked yet
Migration Test App	Robert McDonald	2012-10-22 19:48:01	Looks good on
Project Manager Plus	Robert McDonald	2012-10-22 19:48:01	Needs attention

Status	Description
Looks good	External and In-App Tools have been run and no issues have been found
Needs attention	One or more scripting issues have been found by External and/or In-App Tools
Not checked yet	No External script issues have been found but In-App tool has not been run yet

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Next Actions

- Optimize your applications for the new QuickBase
- Determine whether you have any applications with potentially breaking changes
- If necessary, update and test your applications and scripts prior to cutover
- Cutover to the new QuickBase prior to the deadline
- If you have any issues during the process, please submit a support case at quickbase.intuit.com/support/portal

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QUESTIONS

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