# Deployment Chrome Extension Security

Summary

This document will walk you through how the Botkeeper Chrome Extension works and authenticate its users. The Chrome Extension pulls relevant data securely from your client's QuickBooks Online Account and stores it in your Botkeeper Scoping Tool to ease the process of onboarding new clients to Botkeeper. This is a feature and not required to use Botkeeper' Services.

Installation

The Accountants/Partners at your firm will install the Botkeeper Chrome Extension directly on their Chrome browser. This Chrome extension is unlisted and can only be installed by users with the link below:
[Botkeeper Deployment Chrome Extension Link](#)

User Authentication
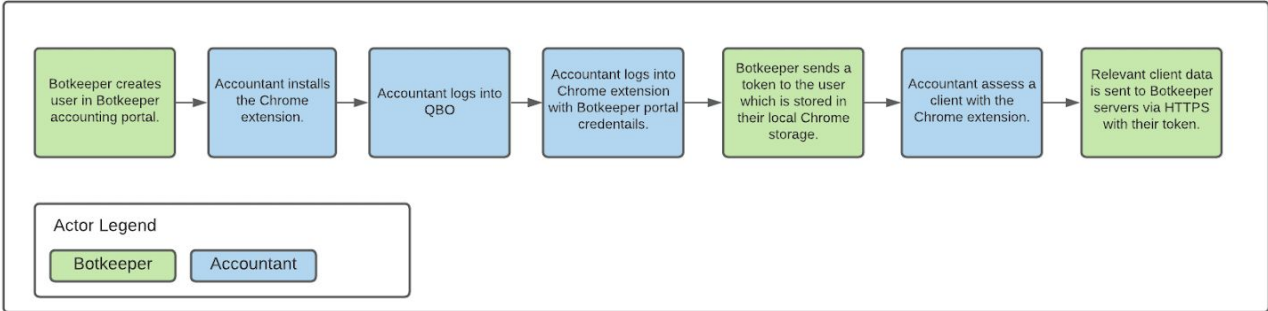
After installing the Chrome Extension the Partner/Accountant will need to login into QuickBooks Online to use the extension. They will then login to the Chrome Extension using their Platform credentials provided by Botkeeper. The Chrome Extension session will last as long as their QuickBooks Online session lasts.

Botkeeper sends the user a token that is stored on their local Chrome storage when they login. When a user assesses a client we include this token in their request to validate that they have the correct permissions to use this tool. User tokens expire after 1 hour.

When a user assesses a client for Botkeeper services, relevant data is pulled using HTTPS and stored on Botkeeper's AWS servers. Our APIs are managed with AWS API Gateway which adds additional security from malicious actors accessing our APIs

Data Pulled from QBO

The Chrome Extension has programmatic access to whatever is shown when a user is logged into QuickBooks Online. We require this level of access so we are able to pull the following data into our portal.

Account Settings Page

- First month of Fiscal Year
- Accounting Method

Overview Page

- Company Setup
  - Subscription
  - Payroll
  - Sales Tax
  - Apps

- Banking Activity (This applies for each account)
  - Accounts
  - Bank Balance
  - In Quickbooks
  - Unaccepted
  - Unreconciled
  - Reconciled Through

- Common Issues
  - Undeposited Funds
  - Uncategorized asset
  - Uncategorized income
  - Uncategorized expense
  - A/R aging (more than 90 days)
  - A/P aging (more than 90 days)
  - Opening balance equity
  - Negative asset and liability accounts

- Transaction Volume (Last 30 days)

- Bank account transactions
- Sales receipts
- Invoices
- Invoice payments
- Bank deposits
- Journal entries
- Expenses
- Bills
- Bill payments

Chart of Accounts

Each account from the chart of accounts is paged. This includes the following for each account:

- Num
- Name
- Type
- Detail Type
- QuickBooks Balance
- Bank Balance

Balance Sheet Report

All of the data on the balance sheet report from 365 days ago by month based on the accounts accounting method.

Profit and Loss

All of the data on the profit and loss page from 365 days ago month over month based on the accounts accounting method.