

Getting Started with Quick Base

Apps Empowered™





Quick Base is a low-code platform that enables citizen developers to build, customize, and connect business apps.

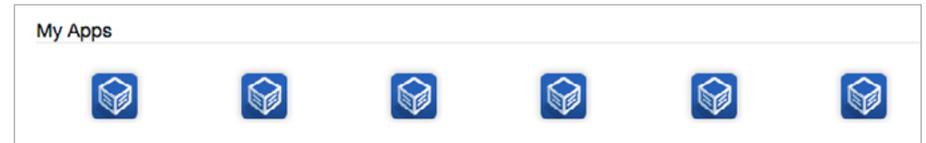
This step-by-step guide will help you learn the main features of Quick Base and how to create an app in minutes. Here are the 5 steps towards successfully using Quick Base:

- 1. Learn the Quick Base language**
- 2. Log into your Quick Base account**
- 3. Know your options for building apps**
- 4. Integrate with other apps**
- 5. Become a power user**

1. Learn the Quick Base Language

Apps

An app is a collection of tables with data, which can be connected to each other and then used to generate reports, charts, email notifications and other workflows.



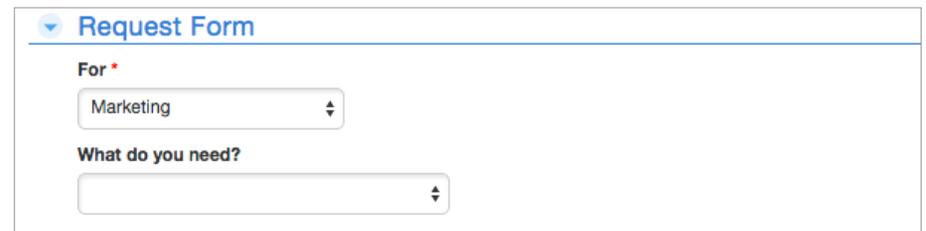
Fields

A field is an individual component of a record, just like the column in a spreadsheet.



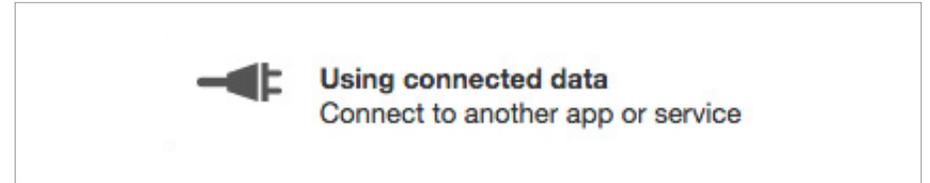
Forms

A form is a way to display an individual record in a format that can be more intuitive for a user who is uncomfortable with large tables and reports.



Integrations

Integrations give you the ability to connect with other cloud apps, so that you can bring more of your data into Quick Base.



Notifications

Notifications are custom alerts that you can set up to keep your team informed and on track.

| | |
|--------------------------|---|
| Notification Name | <input type="text" value="New Project Assigned"/> |
| Notify Whom | <input type="text" value="The user listed in the field: Project Manager"/> |
| Notify When | <input type="text" value="a project is modified or added"/> Additional criteria |

Records

A record is an individual row of data that is stored on one of the tables in your app. This could be a customer, purchase order, student, project, or any other type of data.

| 6 Projects | | | | |
|---|--------------------------------|----------|-------------|----------------|
| | Project Name | Priority | Status | Est Start Date |
|   | Customer Service System Update | High | In-Progress | 05-28-2014 |

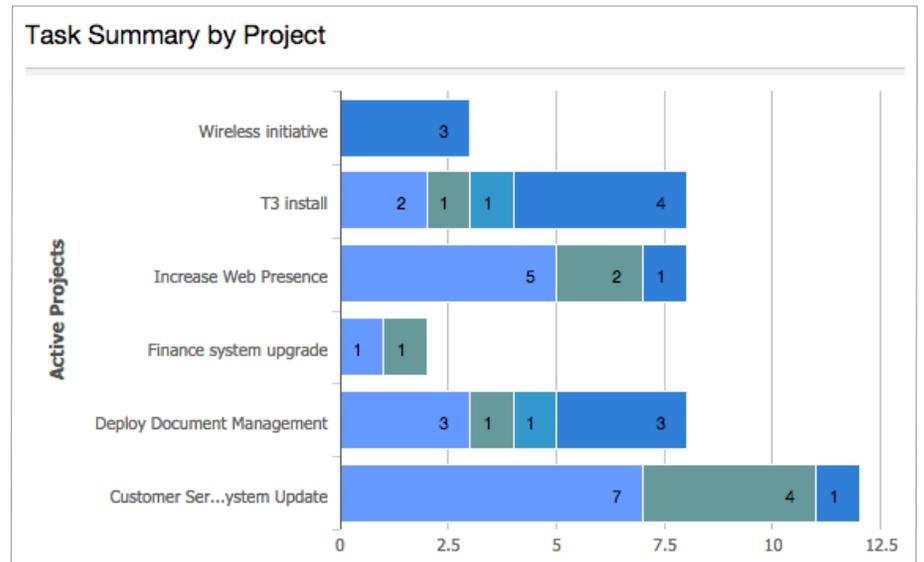
Relationships

A relationship is a connection between two tables of data. It can be used to pass information about records from one table to the other.

| Relationship | Table |
|----------------------------|---|
| <u>Themes</u> -> Campaigns | Many Campaigns belong to one Theme |
| <u>Campaigns</u> -> Assets | Each Campaign has many Assets |

Reports

Reports are methods of organizing, visualizing, and sharing your information. They come in the following forms: charts, tables, summaries, calendars, timelines, and maps.



Roles and Permissions

Roles and permissions are ways for you to control who can see or edit data within your apps.

| <input type="checkbox"/> Role | App Level Permissions |
|---|---------------------------|
| <input type="checkbox"/>  <u>Administrator</u> | Full Administration |
| <input type="checkbox"/>  <u>Team Member</u> ✓ | Basic Access with Sharing |

Tables

A table is a collection of records and also the information that a user wishes to track about each of these records.



Icon Glossary



Everyone on the Internet can access this app.



This app has been modified or new entries have been added to it since you last opened it.



You are the Manager for this app.



You haven't used this app yet (for example, it has just been shared with you by another Quick Base user).



You have used this app and are not the Application Manager.



This is a recommended app from Quick Base Exchange. *Click the app name to create a copy in your account and open the new app.*



This removes an app from your My Apps page.



This shares your app to Quick Base Exchange.



This permanently deletes your app.

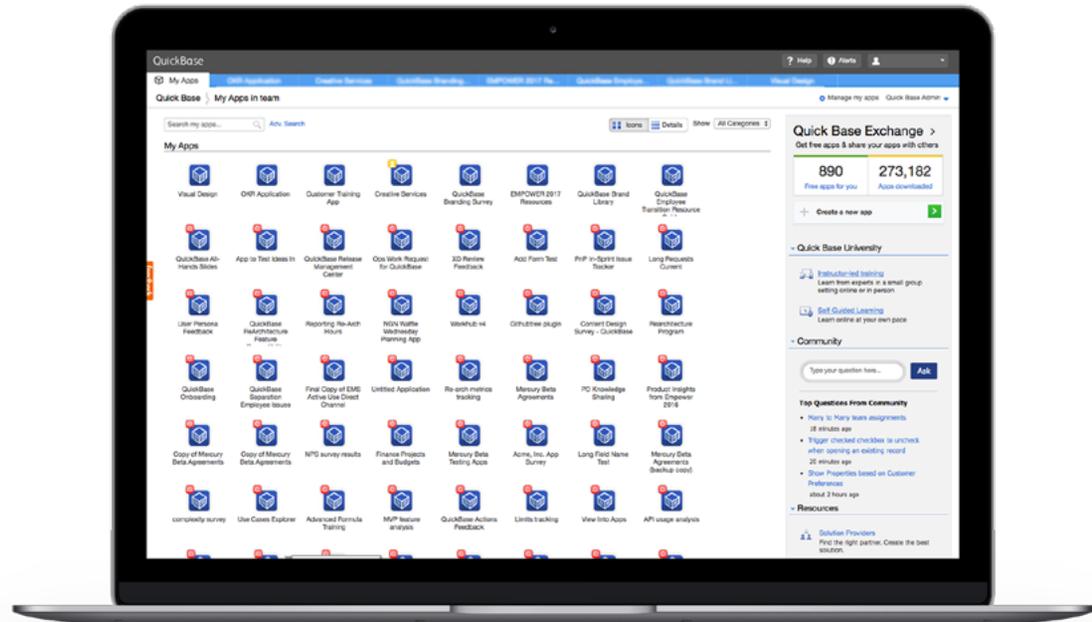


This signifies a table connected with an external cloud app.

2. Log into your Quick Base account

By logging into www.quickbase.com, you'll be taken to your "My Apps" page. My Apps is your personal workspace for creating and organizing your apps in Quick Base and a great place to get familiar with the platform's capabilities you'll use to manage your new apps.

Here you can find current apps that you have downloaded, created, or that have been shared with you.



From this page you can also:

- Access Quick Base Exchange to download ready-to use apps
- Create an app
- Ask questions in the community
- Utilize help resources
- Change preferences
- Manage billing
- Check app updates

3. Know your options for building an app

Four different ways

There are four different ways that you can build your own fully functioning Quick Base app! Take a look at the options below, and choose the one that works the best for you and your team:



Create an app by uploading spreadsheets



Build an app from scratch

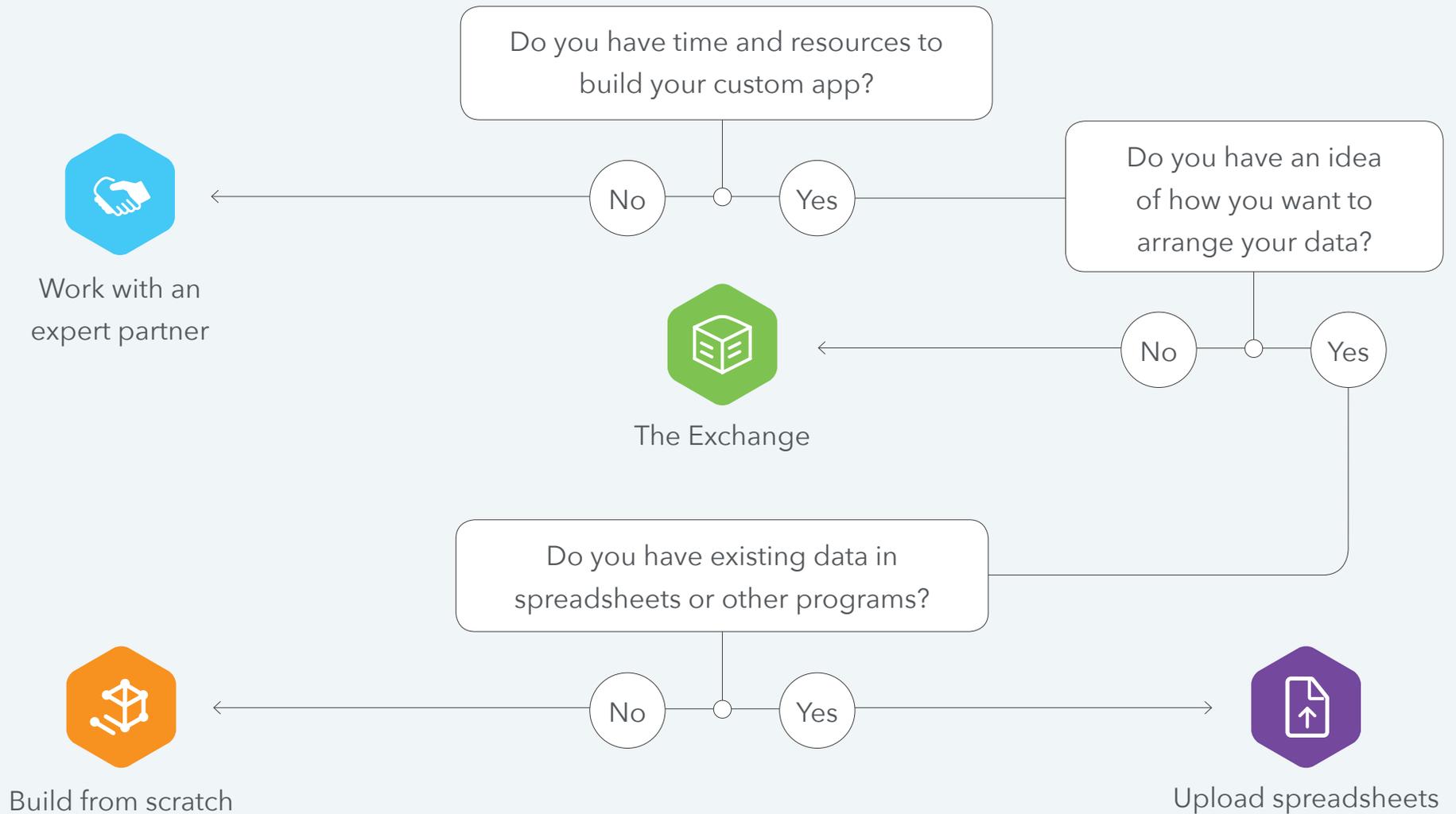


Download a pre-built app from the Exchange



Work with expert partners to build a custom app

Find the right option for you to build your app

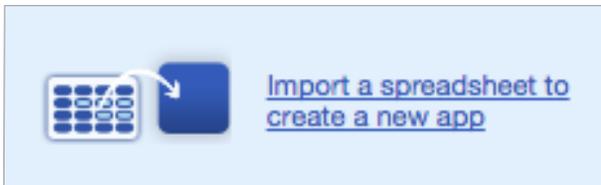




Creating an app by uploading spreadsheets

This option is meant to allow users to either paste columns and rows of data from their clipboard, or to actually import a spreadsheet file into Quick Base. Quick Base will create a one table application and load all of the data from the spreadsheet into that table.

Once your data is imported, your app functions like a relational database, which enables you to divide data into separate tables that are linked to each other.



Close-up of Step 3: Select "Import a spreadsheet to create a new app"

Step 1: Format your spreadsheet for import by deleting blank fields and titles (Note: columns become fields and rows become individual records)

Step 2: On the My Apps page, click "Create a new app"

Step 3: Select "Import a spreadsheet to create a new app" from the dialogue box

Step 4: Copy and paste, or import your spreadsheet by uploading a file

Step 5: Select next, then review the preview results to make sure the field types are correct

Step 6: Select "Create" (Note: your app is now a working app, but you can continue to customize as desired.)



Download a pre-built app template from the Exchange

The Exchange is a repository of apps that have been submitted by Quick Base customers, users, developers, or partners, and can be further edited to fit your needs. Any user can create their own copy of an app template by downloading it from the Exchange.

Apps from Quick Base Exchange can be used as they are, as a starting point for more customized solutions or as an inspiration for apps build from scratch.

QuickBase Exchange >
Get free apps & share your apps with others

| | |
|--------------------------|----------------------------|
| 802 Free apps for you | 210,339 Apps downloaded |
|--------------------------|----------------------------|

Close-up of Step 1:
On the My Apps page,
click on Quick Base
Exchange

Step 1: On the My Apps page, click on Quick Base Exchange

Step 2: Once in the Exchange, use the search tool or the categories tool to find an app similar to your needs

Step 3: Click on any app to view the details, including a description, preview images, reviews and more

Step 4: Select the green “Get this app” button to download your copy of the app

Step 5: Explore the app, add, rename, delete tables and fields to fit your unique workflows, customize the homepage with different reports, and delete sample data



Build an app from scratch

Building an app from scratch allows you to define the tables, fields and relationships that comprise it. Create an app that maps exactly to your unique needs and processes, no coding required.

Our no-code and low-code capabilities make it easy for citizen developers to quickly build apps without writing a single line of code.

CHOOSE A METHOD

Database

Create an application from scratch by defining the tables, fields and relationships that comprise it.

Spreadsheet

Create a QuickBase application the same way you would create a spreadsheet by creating fields (columns) and entering data (records) in the grid to the right.

Close-up of Step 3:
Choose the "Database"
method

Step 1: On the My Apps page, click "Create a new app"

Step 2: Select "Build a new app from scratch" from the dialogue box

Step 3: Choose the "Database" method

Step 4: Name your application, add any tables, records, and fields you'd like to begin with and press "create"

Step 5: When building from scratch the order is up to you, but some steps to consider include: Adding data to your tables, editing the settings of your app, adding new tables and relationships, and adding reporting.



Work with an expert partner to build a custom app

If you need help building or designing a Quick Base application or if you don't have the resources to do it in-house, a Quick Base Solution Provider (QSP) can help you.

QSPs are Quick Base partners who work to deliver your exact requirements and can help extend your app's functionality with custom-made add-ons.



To find a QSP who fits your needs, visit the website and search by business and technical skills, region, and language.



Looking for QSP recommendations? Contact us here.

4. Integrate with other apps

There are three ways to integrate your data

1.) Quick Base Sync

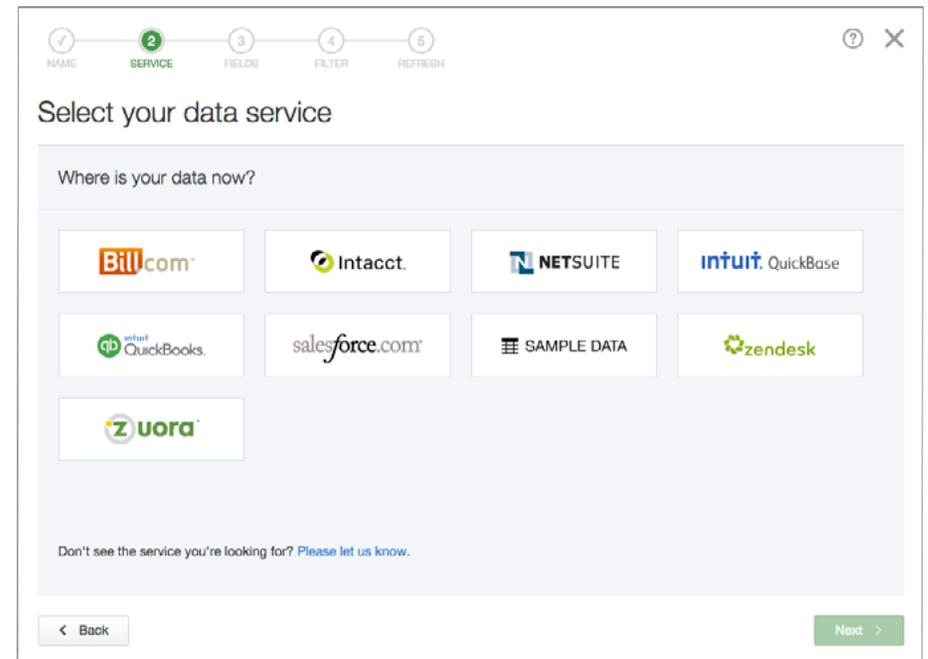
[Easily integrate Quick Base with top cloud apps such as QuickBooks, Salesforce, Zendesk, and more to save time and make better decisions.](#) Quick Base Sync is a powerful (and free) data integration capability built within Quick Base, allowing you to instantly bring in all of the data you need and have it sync automatically.

2.) Quick Base API

[Create custom integrations using the Quick Base API](#)

3.) Quick Base Add-ons

[Use add-ons created by our expert Quick Base partners to augment your apps and take their functionality further.](#)



5. 12 steps to becoming a power user

Beginner

1.) Start a new app through your chosen method

[Step-by-step documentation](#)

2.) Change the name of an app or table

[How-to video](#)

3.) Add a custom field

[How-to video](#)

[Step-by-step documentation](#)

4.) Share your app with a new team member

[Step-by-step documentation](#)

Intermediate

5.) Set up a custom notification

[How-to video](#)

6.) Add and customize a report for your data

[How-to video](#)

[Step-by-step documentation](#)

7.) Set custom roles and permissions for app users

[Step-by-step documentation on roles](#)

[Step-by-step documentation on permissions](#)

8.) Publish a form

[How-to video](#)

[Step-by-step documentation](#)

Advanced

9.) Compile reports and charts onto your dashboard

[How-to video](#)

[Step-by-step documentation](#)

10.) Define a relationship between two or more tables

[Step-by-step documentation](#)

11.) Set up a custom formula

[Step-by-step documentation](#)

12.) Create a connected table to a third-party app

[Step-by-step documentation](#)



View our Best Practices webinar series

Part 1: [Organizing Data –
Dashboards & Reports](#)

Part 2: [Roles/Permissions
and Customizing Forms](#)

Part 3: [Notifications, Subscriptions,
and Reminders](#)

eBook: [Best Practices to Improve
Your End User Experience](#)

Resources

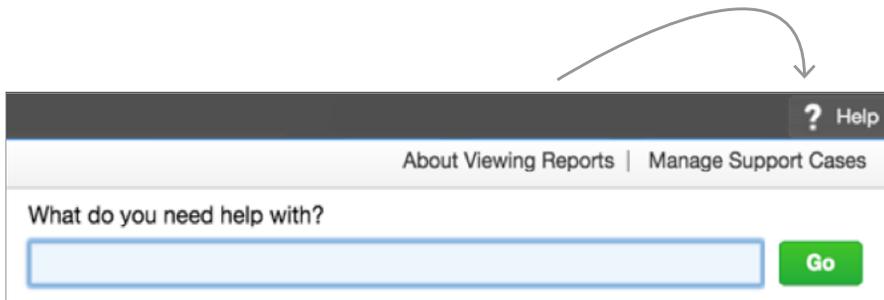
Speak directly with our support team

Are you stuck and want some one-on-one guidance? Talk with a member of our support team to get help.

[Contact them here](#)

Quick Base Help

If you ever have a question while using Quick Base, click the “Help” button on the top right hand side to instantly access your resources. Search the online help to find step-by-step instructions that range from creating a new report to setting up a custom dashboard.



[Click here to search the online Help portal](#)

Community Forum

Explore the Quick Base Community, where experienced developers and Quick Base staffers share tips and tricks. You can search for a solution or post your own problem for discussion.

Demos

Another great resource for getting started is our webinar series. Webinars are held daily and titles include:

- New Customer Orientation
- Learn Quick Base in Minutes
- Learn Quick Base for Sales and Support
- Learn Quick Base for Projects
- Customizing Your Quick Base
- Quick Base Tips and Tricks

[View available webinars here](#)

How-to videos

Access our playlist of quick two-minute how-to videos to get an idea of key functionality within Quick Base.

[View the playlist](#)



About Quick Base

Quick Base provides a cloud-based platform that empowers problem solvers to quickly turn ideas for better ways to work into apps that make their organizations more efficient. For nearly 20 years, people of all technical backgrounds have been using the Quick Base platform to create solutions that streamline processes, capture real-time data, and improve company operations, all while working in concert with existing IT systems. Based in Cambridge, MA and a former division of Intuit, Quick Base has a 6,000+ customer universe of app-enabled businesses that spans all industries and company sizes, and includes more than half of the Fortune 100.

www.QuickBase.com

