

QuickBooks Remote Access

QuickBooks Remote Access gives you the flexibility to work on a client's QuickBooks company file from almost any remote location.

Using Remote Access, you can view, remotely control, and annotate you client's QuickBooks file to train, analyze and solve problems.

You might want to use Remote Access to show a client how to use a feature, or to troubleshoot a problem directly on his or her computer. You can also transfer files to and from a customer's computer using the Remote Access feature.

This service provides the following features:

Chat—Allows you and your client to send and receive messages during the Remote Access session.

Application sharing—Allows you to view, remotely control, and annotate a client's QuickBooks application.

File transfer—Allows you to transfer any types of files to and from a client's computer.

Some considerations about the Remote Access feature:

- ❑ The consultant must have the Accountant Edition to remotely access clients on all editions of QuickBooks 2002. The Premiere (non Accountant) edition can only initiate remote access sessions with other Premier editions. The Basic and Pro editions cannot initiate remote access sessions.
- ❑ The consultant must pay an additional fee to use the remote access service after a free 15-month subscription – from the date you *install* QuickBooks 2002. After the free period, WebEx will bill you a nominal fee (yet to be determined) per month.
- ❑ Both you and the client must have an active Internet connection.
- ❑ Slow dial-up connections will make it difficult for the consultant to do extensive work, but for quick troubleshooting or training sessions, the performance on dial-up connections is quite adequate.
- ❑ This is not a solution for creating an ASP server of QuickBooks files. Only one person can control the computer on which QuickBooks is running. Either the remote consultant, or the person in front of the computer.

Setting up for Remote Access

Consultant Setup

Before you can use the remote support feature, you must launch QuickBooks Premier (or Accountants Edition), connect to the WebEx website and create a user account for yourself.

To set up your account:

1. Launch QuickBooks and select Business Services Navigator from the Company menu (see Figure 0-1).
2. Click on the **Access QB Remotely** link on the screen shown in Figure 0-1.



Figure 0-1 QuickBooks Business Services Navigator

3. On the screen shown in Figure 0-2, scroll down and click on **Sign Up Now**.

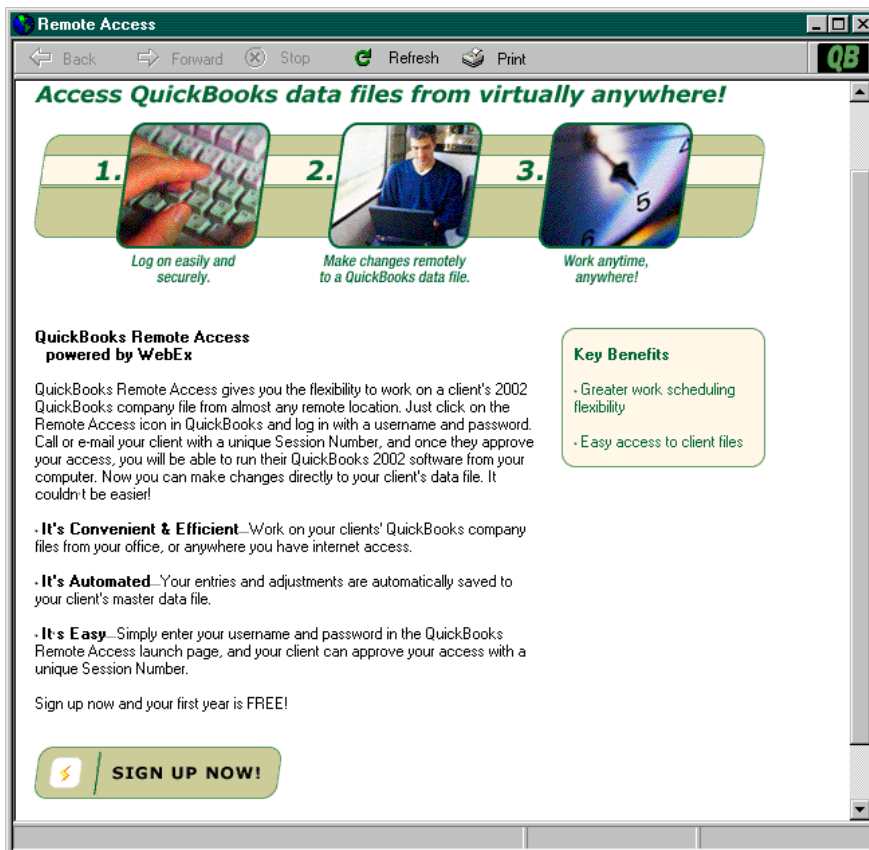


Figure 0-2 QuickBooks Remote Access Information screen

4. Enter your email address and user information and then click **Sign Up Now** (Figure 0-3).

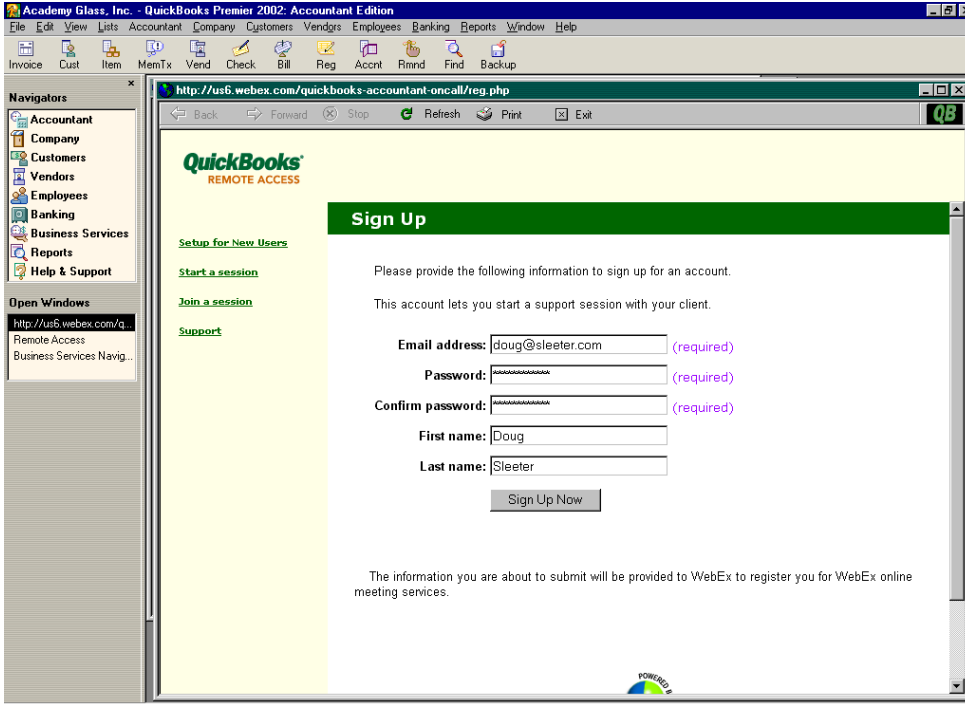


Figure 0-3 QuickBooks Remote Access Sign Up screen

5. After WebEx processes your account information, you'll see a confirmation screen as shown in Figure 0-4.

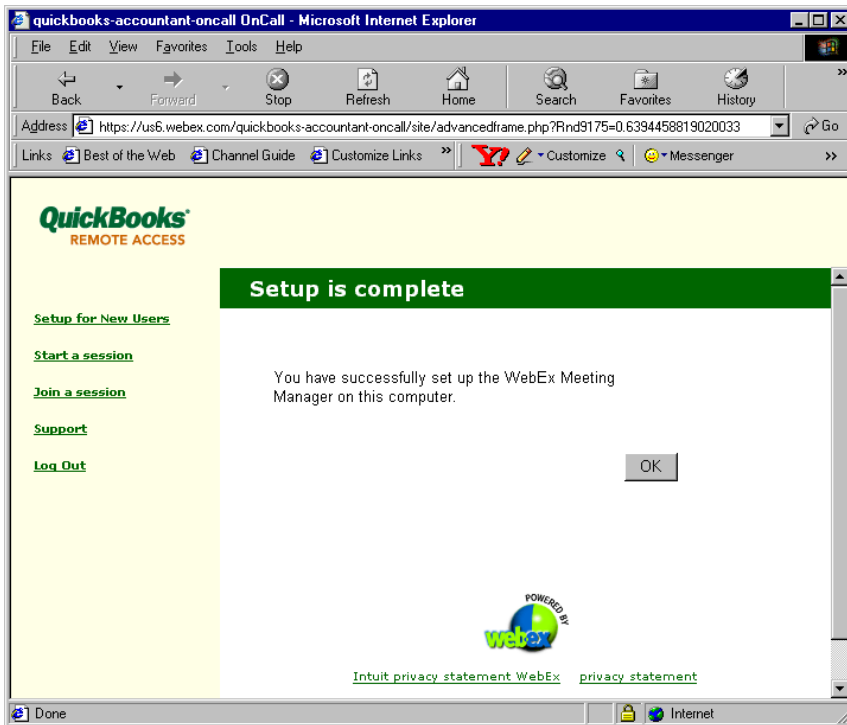


Figure 0-4 Setup complete screen

6. Click **OK** and you'll see the Setup is complete page shown in Figure 0-5.

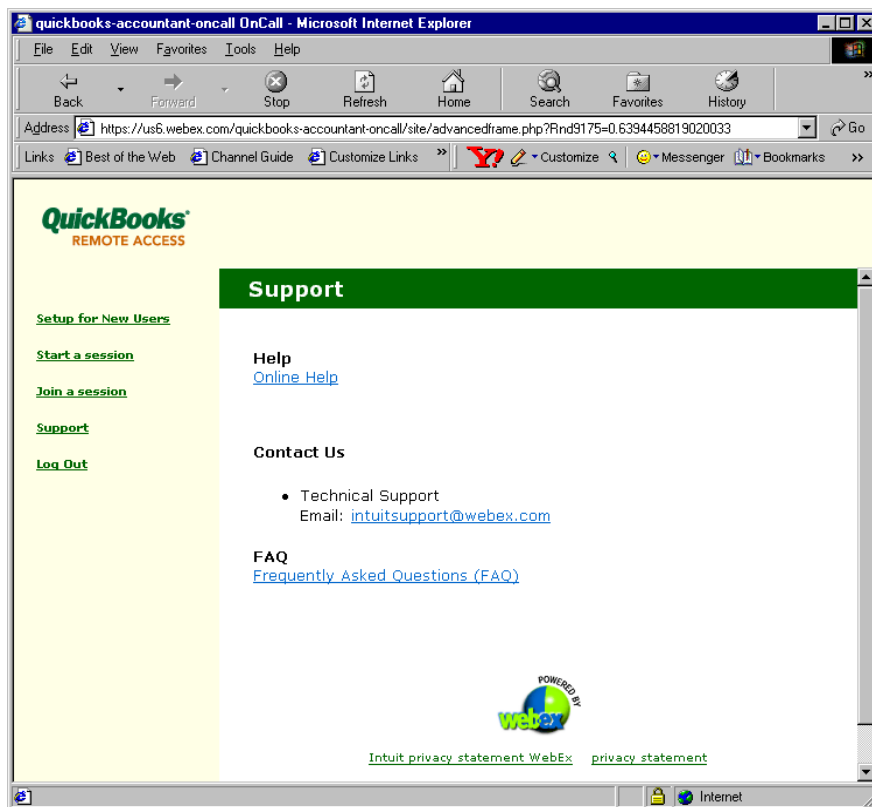


Figure 0-5 QuickBooks Remote Access Support screen (no session started)

You're now ready to begin supporting clients remotely. To begin a remote support session, see the next section.

Consultant Instructions

Creating a Remote Access Session

To create a remote access support session with your client, follow the steps below. There are two separate sets of instructions: one for the consultant and one for the client.

1. Launch QuickBooks Premier Accountants Edition and open a company file (it doesn't matter which company you open).
2. From the **Accountants** drop down menu select "Remote Access."
3. Click "Start a Session."
4. If this is your first Remote Access session, your browser prompts you to allow it to download a small plug-in from WebEx. Click **Yes**.

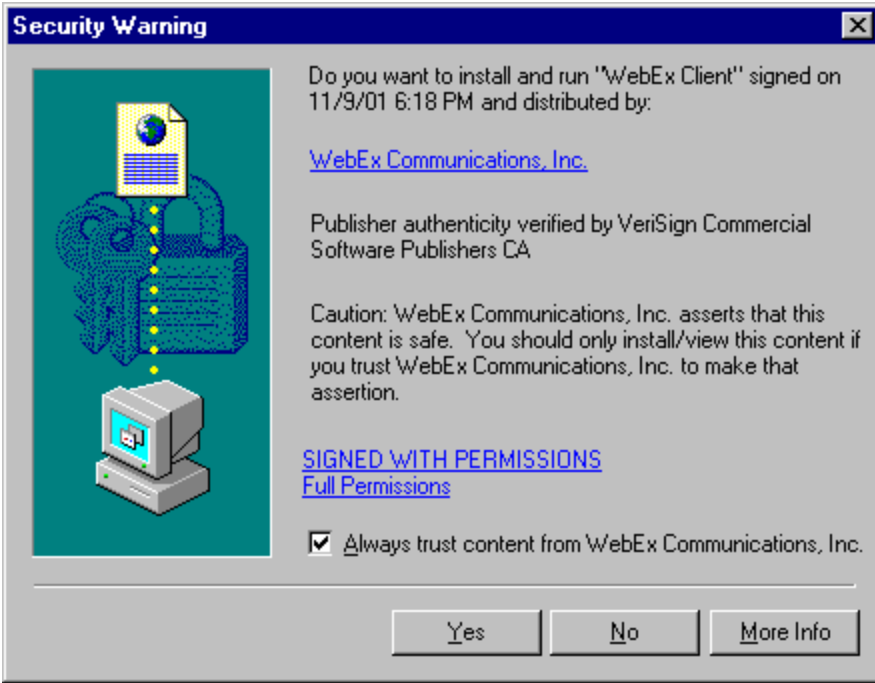


Figure 0-6 Security warning about downloading the WebEx client software

- Once you begin the session, WebEx provides you with a URL and a unique Support Number (see Figure 0-7). Instruct your client to log on to the Internet and go to this URL (<https://us6.webex.com/quickbooks-accountant-oncall/>).

Then, instruct the client to click Join a session where they will be prompted for a Name and Support Number. Tell the client to enter his or her first name only. There is a problem with the file transfer feature if the name is too long, so keep the client name short. Enter the support number in the Support Number field.

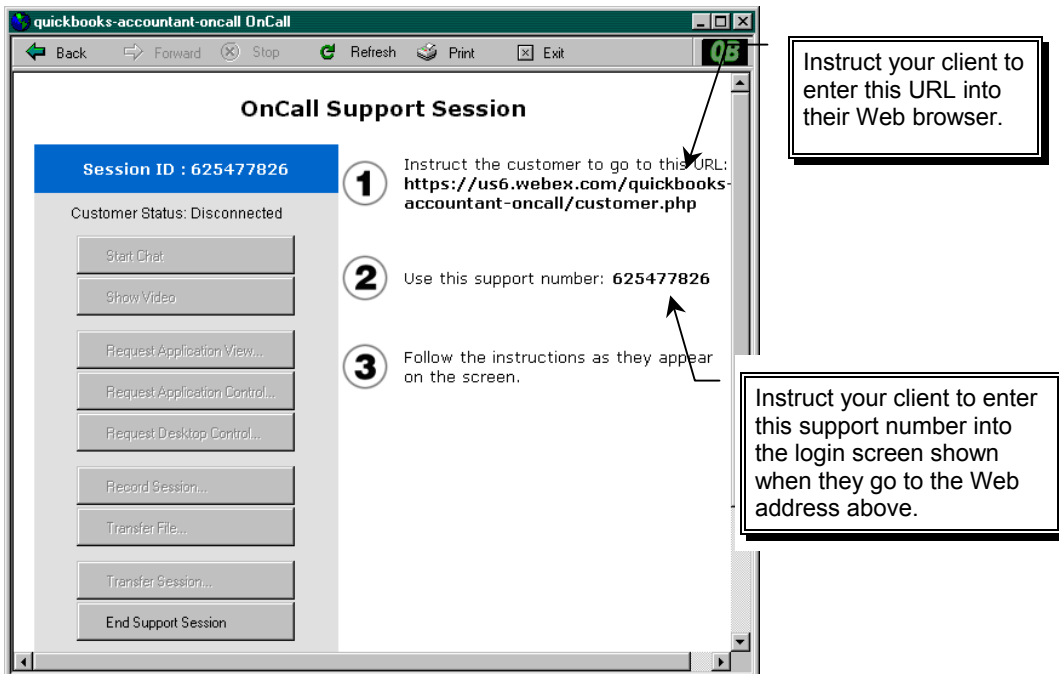


Figure 0-7 OnCall Support Session screen - Client not logged on

- Once your client has entered the session, the grayed-out fields on your computer become active (see Figure 0-8). At this point you can view or control your client's QuickBooks application, trade files, or chat with your client.

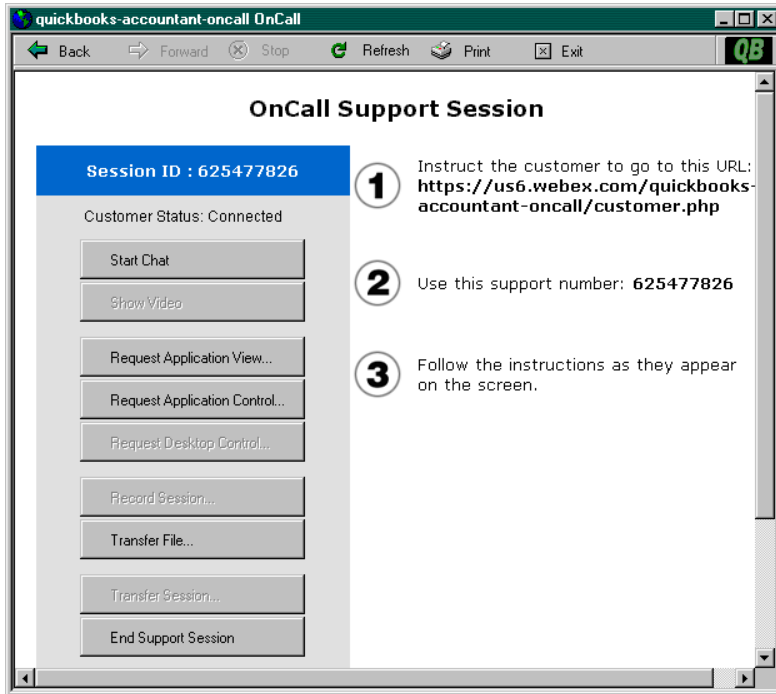


Figure 0-8 OnCall Support Session screen - Client logged on

Chatting with your Client

The Chat feature works like an Instant Messenger, allowing you and your client to send and receive messages during a Remote Access session. This feature is particularly helpful if you or the client has a single phone line and is unable to use the phone during the remote access session.

How to use the **Chat** feature:

- Click **Start Chat** on the screen shown in Figure 0-8. This will open the WebEx chat window shown in Figure 0-9.

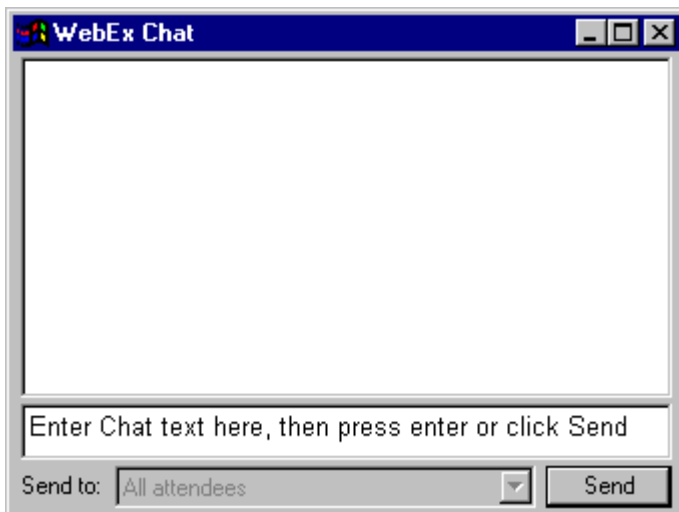


Figure 0-9 WebEx Chat window

- When you enter chat text and click **Send**, WebEx automatically opens the same **WebEx Chat** screen on your client's computer and shows the text you entered. The chat feature uses the session user names to identify each chat participant's portion of the text.

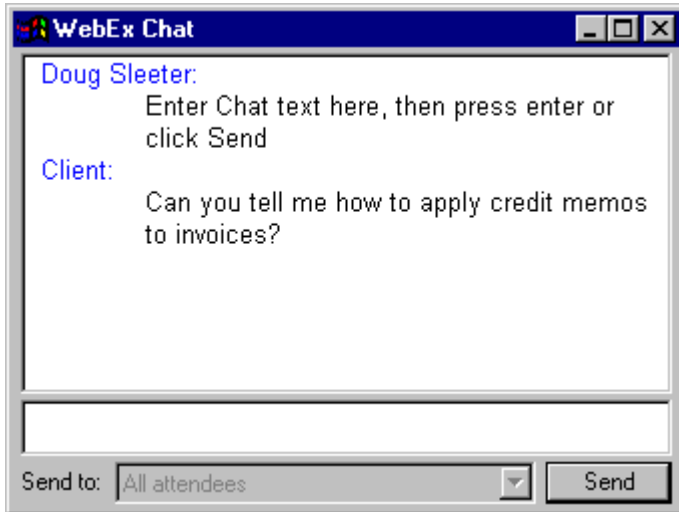


Figure 0-10 Chat screen with messages between consultant and client

- Click **X** in the upper right corner of the screen to close the window when you're finished with the chat session.

Viewing and Controlling your Client's QuickBooks Application

The view feature allows you to see your client's application and to watch your client as he or she uses the program. Application Sharing allows you to control your client's computer remotely while your client observes you using the program.

How to view or control your client's QuickBooks application:

- Click **Request Application View** or **Request Application Control** on the screen shown in Figure 0-8.
- Wait for your client to give permission for you to control their system. You'll see the screen shown in Figure 0-11. At the same time, your client sees a screen that says "Do you want to allow the support representative to share control of your application?" (See Figure 0-21.) Instruct your client to click **OK** on this screen. Then click **OK** on your screen shown in Figure 0-11.



Figure 0-11 Waiting for permission to control client computer

3. Click QuickBooks Pro in the WebEx Remote Support Console (Figure 0-12) and click **Share**.

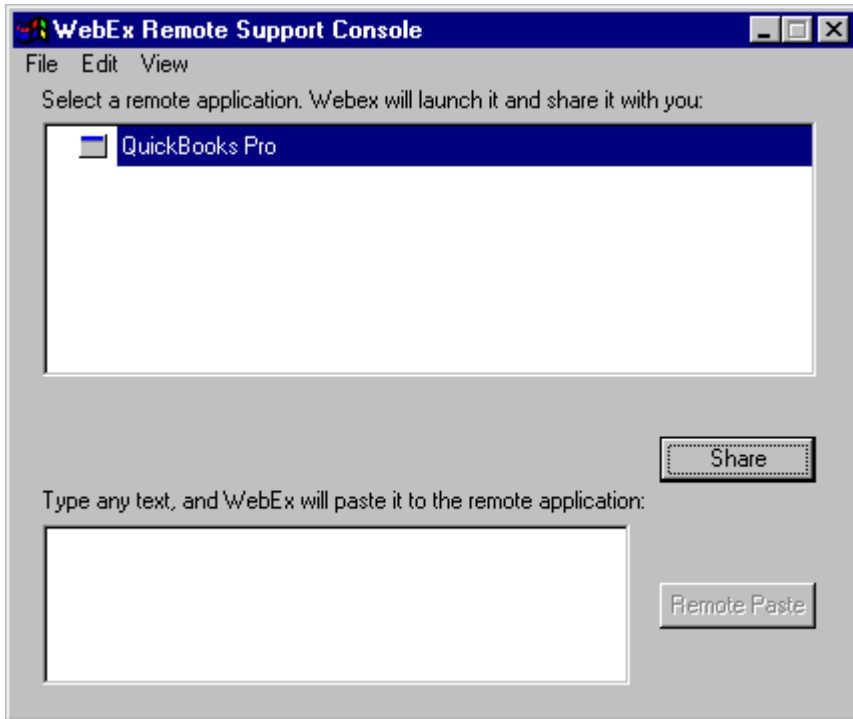


Figure 0-12 WebEx Remote Support console

4. You'll now see your client's QuickBooks application inside of an *Application Control* window as shown in Figure 0-13.
5. To control your client's computer, click your mouse. (If you are in Application Viewing, this option is not available to you.) When you have control, you can do everything the client can do within the QuickBooks application. However, you cannot go outside of QuickBooks to view or control any other applications.

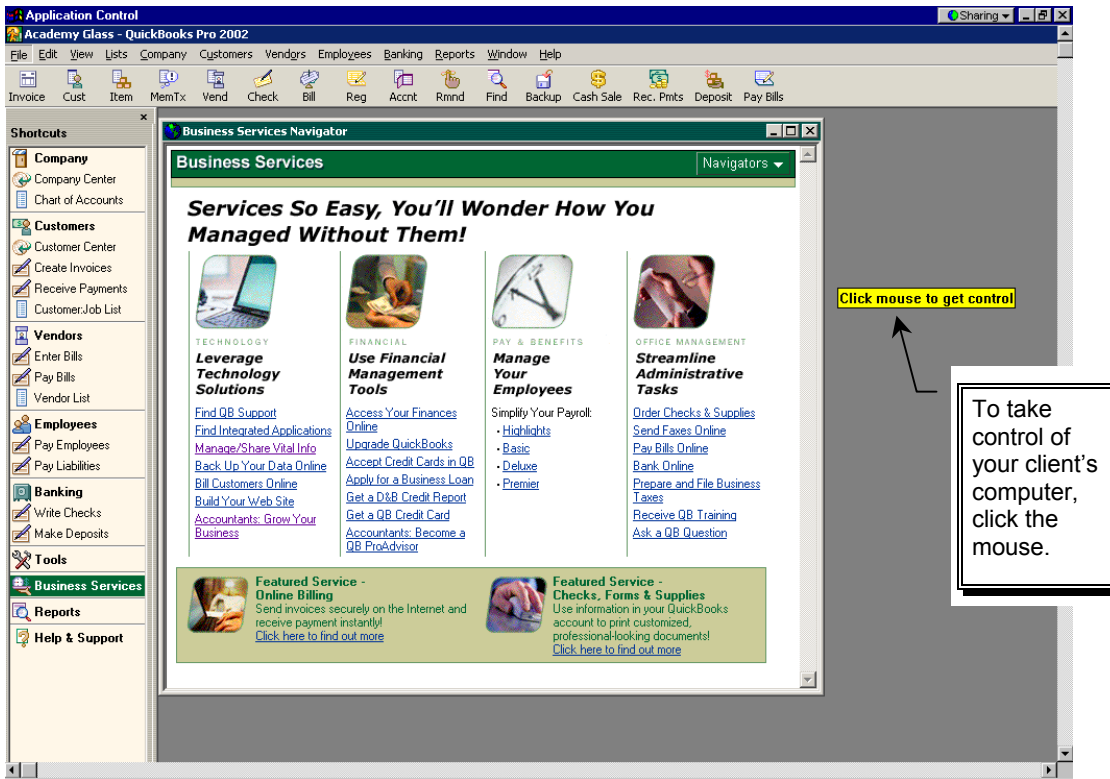


Figure 0-13 View of remote QuickBooks window inside of the Application Control window

- The Sharing menu at the top of the Application Control screen (Figure 0-14) controls annotating and allows you to stop sharing with the client.

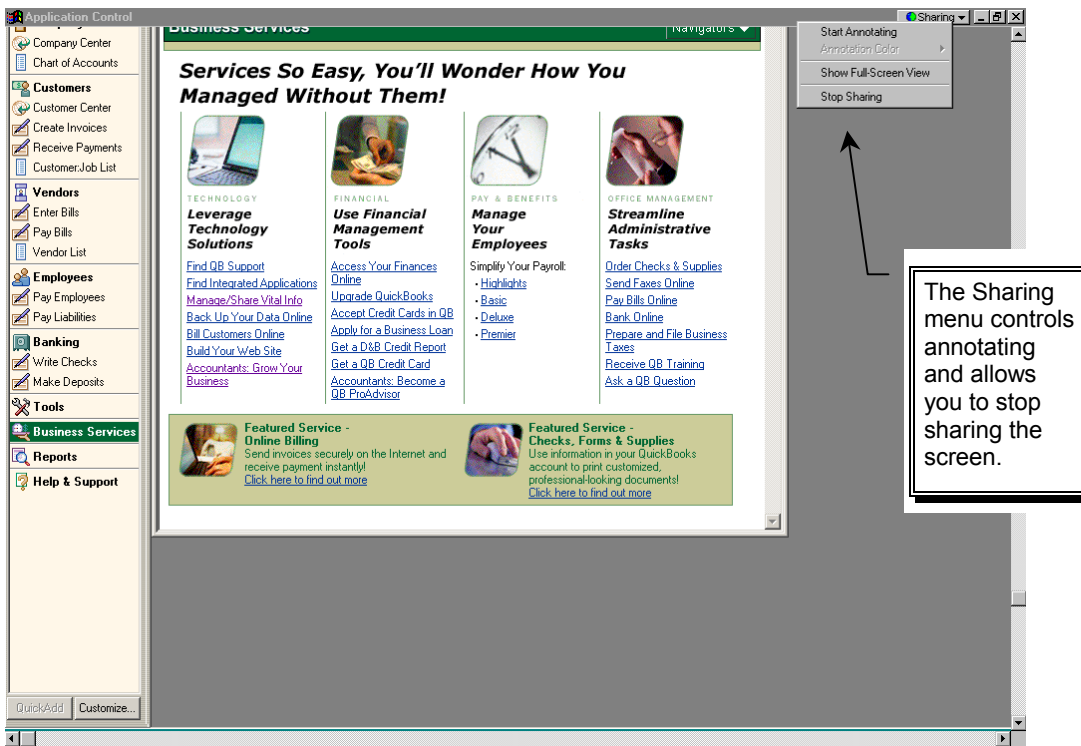


Figure 0-14 Application Control window - The drop-down menu shown

Sharing Files Between Client and Consultant

The client's data file may need extensive repair. If you need to spend a significant amount of time working on a client's QuickBooks data file, it is probably best to have the client send a backup of the file to you. Attaching a file to an email is one way to send files between you and your client. However, QuickBooks files tend to get fairly large, and many mail servers (servers on the Internet) limit the size of email attachments to between 2 and 5 megabytes. However, there is no file size limit in WebEx, so for larger data files use WebEx to transfer the file.

How to transfer files between you and your clients:

1. Click **Transfer File** on the OnCall Support Session screen shown in Figure 0-8.
2. Your client will now see a screen prompting them to give you permission to share transfer files to and from their hard drive. Have the client click **OK** on this screen to give you permission.
3. When you initiate the Remote Access session, WebEx creates a folder on the client's hard drive called "WebEx Support Session." When your client gives you permission, you'll be able to see the contents of their WebEx Support Session folder located on their desktop. You can copy files from your local drives to the client's computer by dragging them back and forth in this window just like you do in the Windows Explorer.

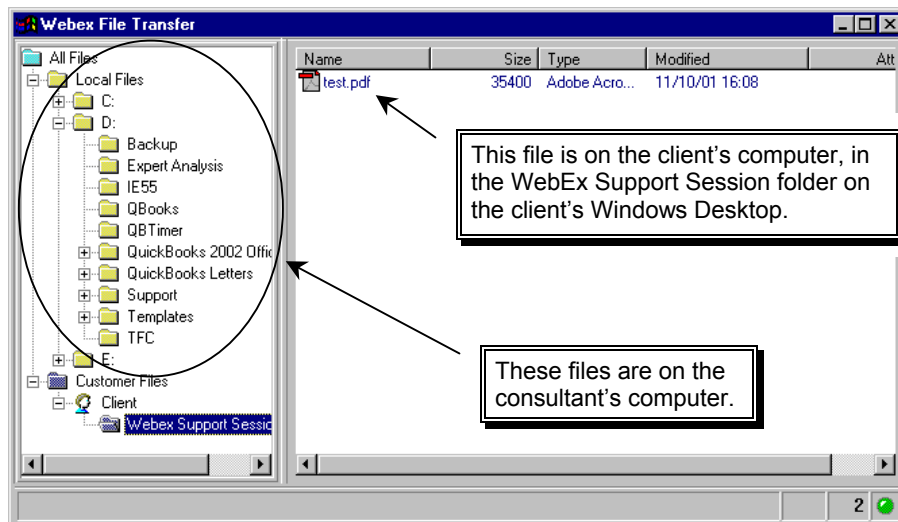


Figure 0-15 File transfer window on the consultant's computer

4. In order for you to transfer a file from your client, he or she must copy the file into their WebEx Support Session window as shown in Figure 0-16

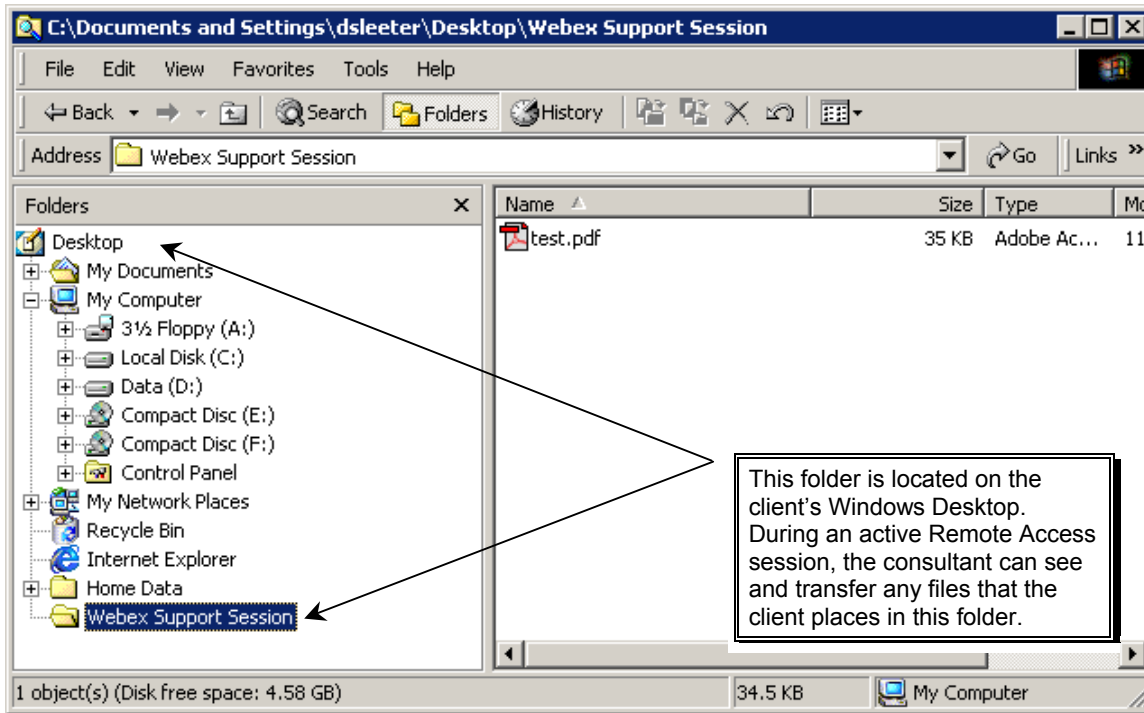


Figure 0-16 Window explorer on client computer. Copy files into the WebEx Support Session folder

Client Instructions

After you (the accountant) successfully establish a support session, instruct your client to follow these steps:

1. Open an Internet browser, and connect to the Internet. Then go to <https://us6.webex.com/quickbooks-accountant-oncall/>.
2. Log in to WebEx using your email address and WebEx password. If you have not registered with WebEx, click **Setup for New Users** on the screen shown in Figure 0-17.

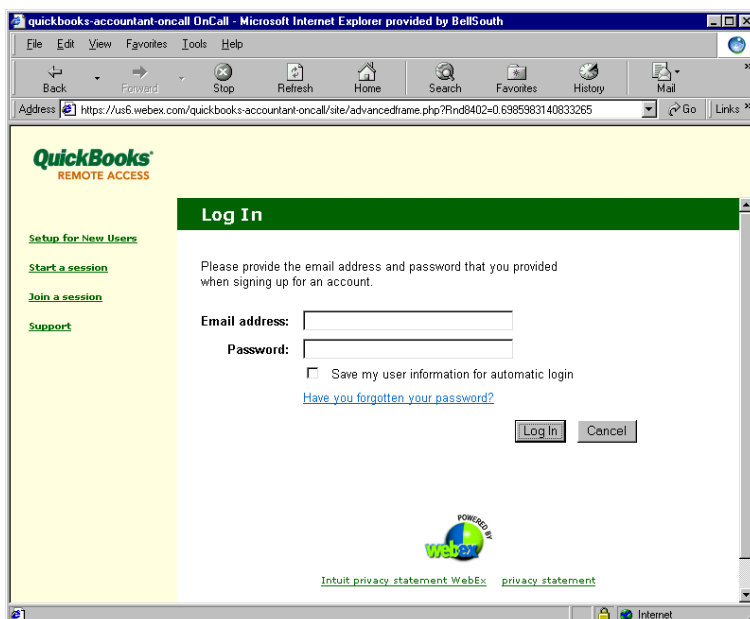


Figure 0-17 WebEx Log In screen

3. This brings up the WebEx OnCall site as shown in Figure 0-19.
4. Click **Join a session**.

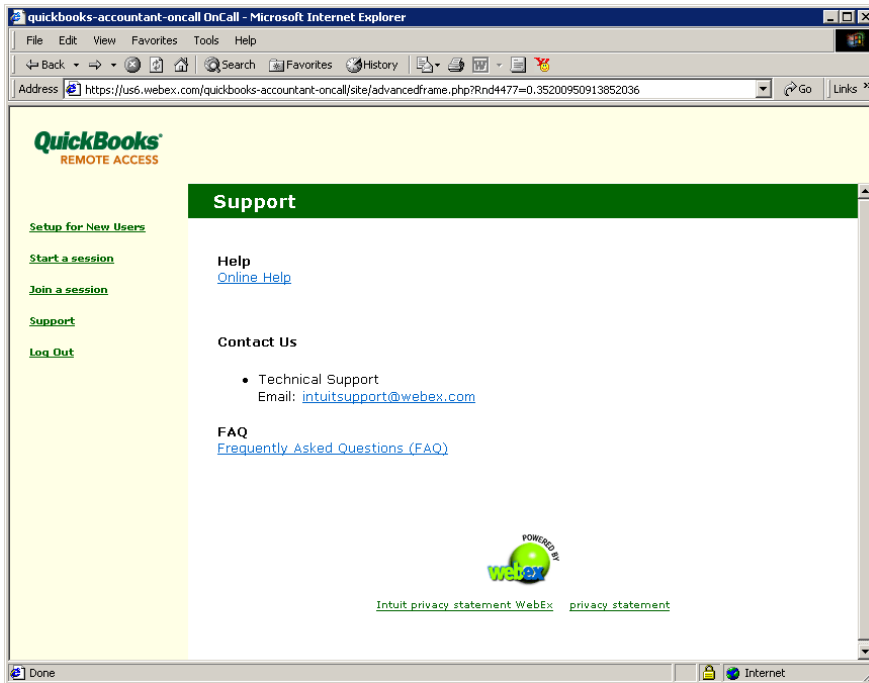


Figure 0-18 WebEx OnCall support site

5. Enter your first name only, or leave the name field blank. There is a problem with the file transfer feature if the name is too long, so keep the client name short. The Consultant will provide you with a support number. Enter the support number in the **Support Number** field. Then click **Join**.

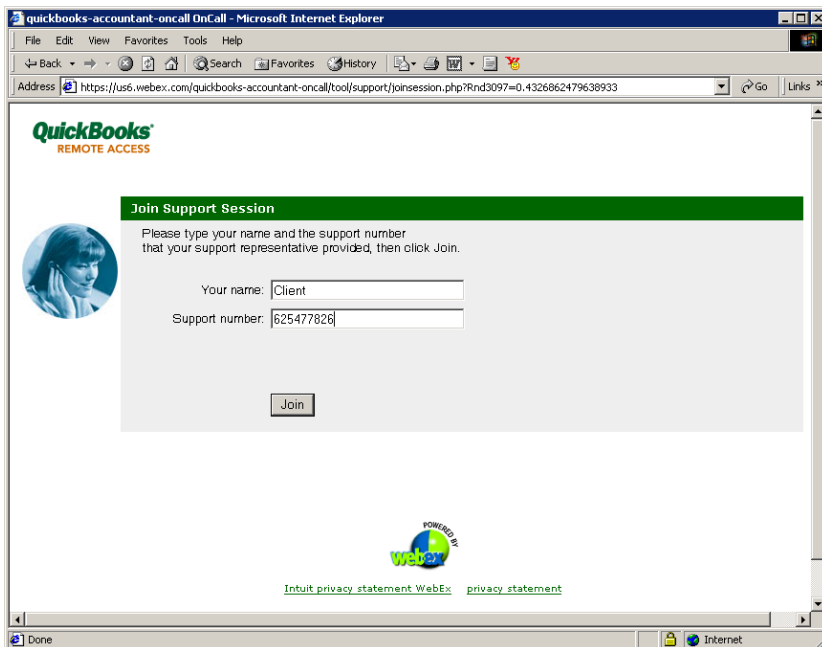


Figure 0-19 Join Support Session screen - Enter first name only and support number provided by your consultant

6. You are now ready for your accountant to view or control your QuickBooks application.

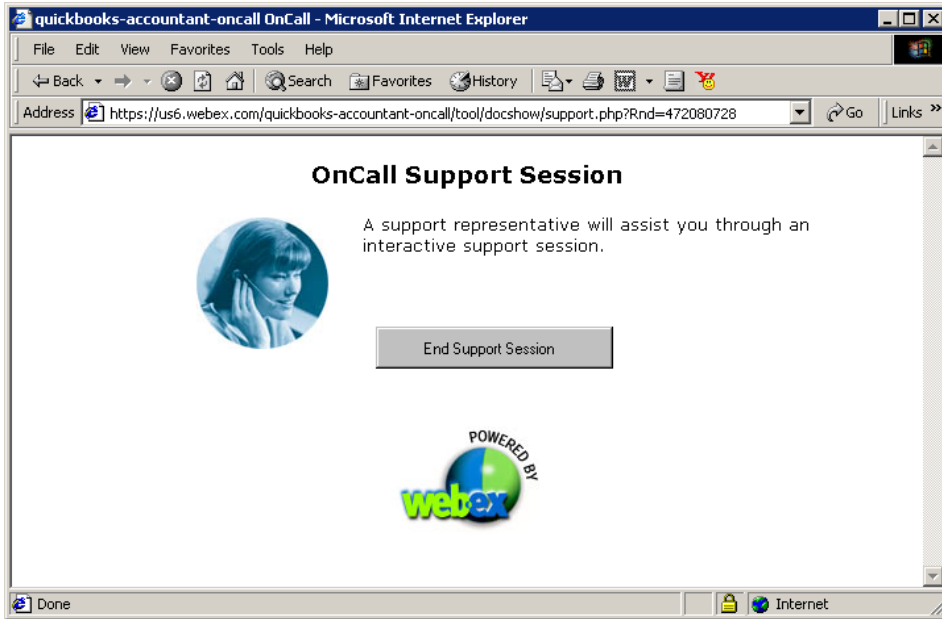


Figure 0-20 OnCall Support Session - Not currently sharing with consultant

7. When your consultant wants to control your computer, you'll see the message shown in Figure 0-21. Click **OK**.

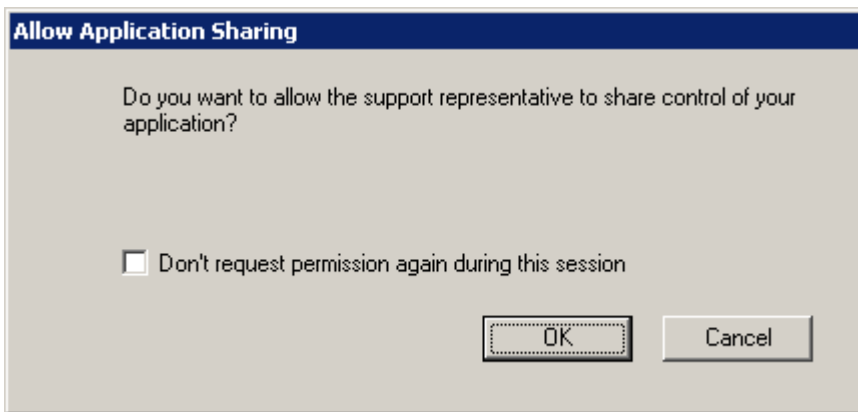


Figure 0-21 Request for application sharing

8. Then select the QuickBooks Pro application and click **Share**.

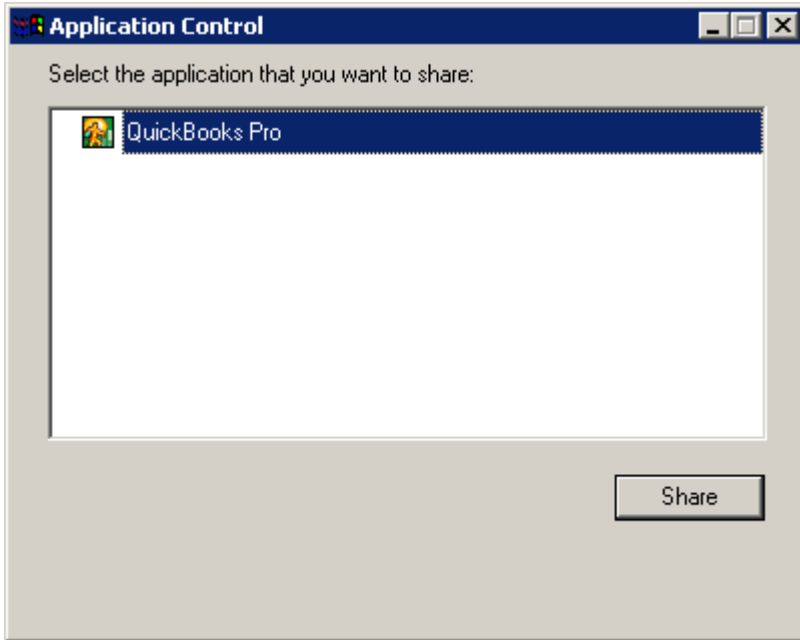


Figure 0-22 Application Control window

9. When your consultant is controlling your QuickBooks application, whenever you move your mouse you'll see a message saying your consultant has control. To take control back, click your mouse.

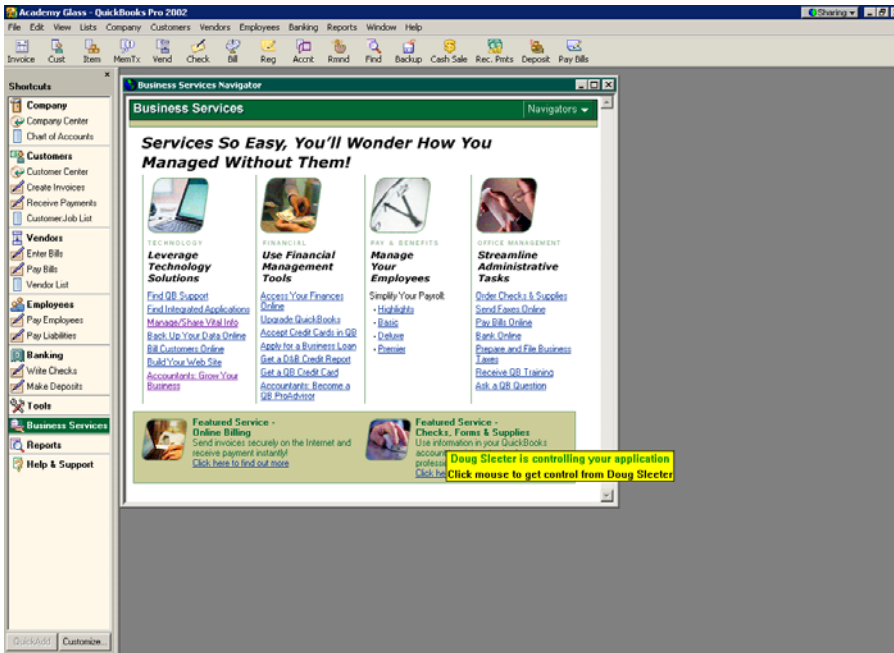


Figure 0-23 Consultant controlling client computer

10. To suspend sharing with your consultant, select **Stop Sharing** from the Sharing menu at the top right of your screen.

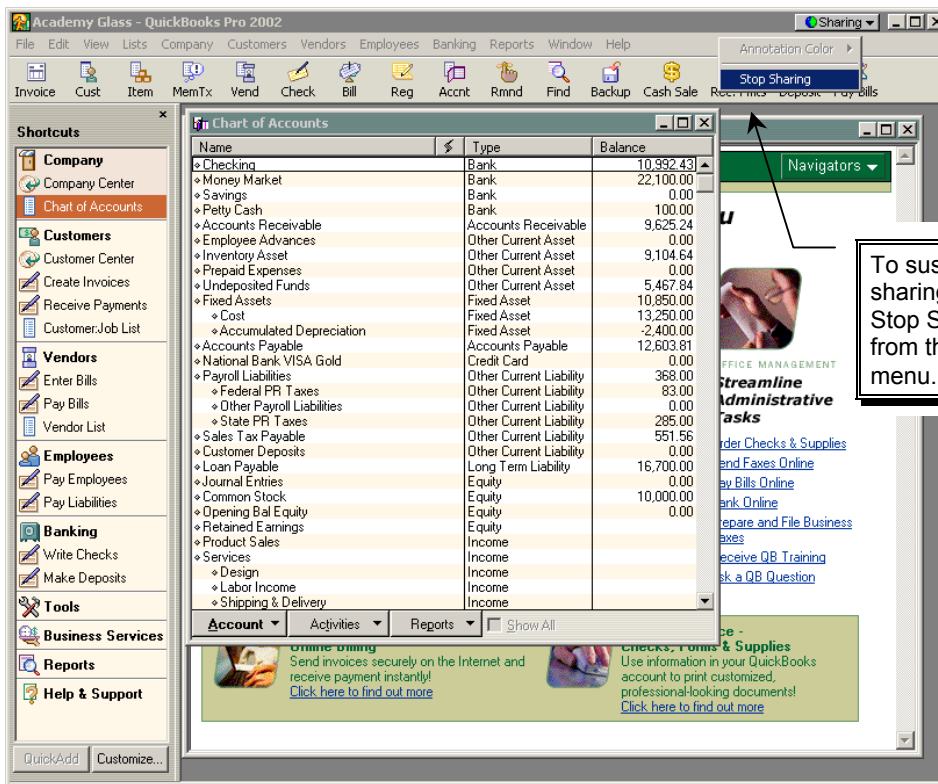


Figure 0-24 Sharing menu on remotely controlled computer

Troubleshooting and Support

QuickBooks Versions

If you see the screen in Figure 0-25 or if your client sees the screen in Figure 0-26, there are two possible causes. First, the obvious one is that your client may not have QuickBooks version 2002 (Basic, Pro or Premier) installed. The second possibility is some problem with the QuickBooks installation. The fastest way to resolve this problem is to have your client reinstall their QuickBooks application from CD.



Figure 0-25 Consultants view of QuickBooks 2002 not available

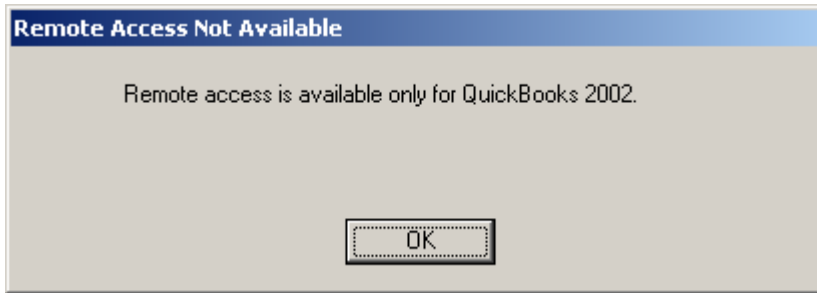


Figure 0-26 Client's view of QuickBooks 2002 not available

Multiple Users

If you have a 5-user license for QuickBooks, you can have 5 copies of QuickBooks Premier sharing a single data file. Obviously, the data file must be on a network drive for this to work.

There has been a lot of confusion from users who think they can setup QuickBooks Premier on a single computer and use the other four licenses to provide other people with remote access to that computer. Of course, like all windows applications, only one person at a time can control the QuickBooks application on the host computer at any given time.

If your goal is to provide five users with remote access to the same data file, you will need to install five separate licenses of QuickBooks Premier onto 5 separate computers. The computers must be connected using a Local Area Network (e.g. Windows NT or Novell). Each of the five users can then remotely access their assigned computer (e.g. the computer in their office). While the user has remote access of the office computer, no one else in the office can use that computer.

WebEx Accounts

Each copy of QuickBooks can have its own Remote Access Account. However, you can only setup two computers per account. So if you have 5 computers, you will need to set up 3 additional accounts. When you register as a WebEx user, WebEx links the user's email address (log-in name) and password to the computer you are using to register. If you set up a computer with your email address and password, no one else can access QuickBooks on that computer unless they have your account information. So if there is one computer that several different people need to remotely control, you must provide everyone with the specific login name and password for the account associated with that computer.

Account Expired Message

If you receive a message from WebEx stating that your account is expired, there are two possible causes. The most likely is also the most obvious – your account is expired. Since you receive a free 15-month subscription (from the day you install QuickBooks 2002) you should not receive this message until that free trial period is ended. If you do, it could be that you are using the QuickBooks sample file. Intuit has programmed a 2003 date into that file and this could confuse WebEx. Also, if you upgrade a QuickBooks data file from an older version of QuickBooks, WebEx may think that you have been operating QuickBooks 2002 for longer than 15 months, creating the false Account Expiration Message.

If you run into any of these problems, send an email to WebEx's technical support department at intuitsupport@webex.com.

Conclusion

This new feature of QuickBooks 2002 is probably one of the most important additions to QuickBooks. Accountants and clients need to trade data, and this makes that process much easier. We applaud Intuit for finding an integrated solution that provides real value to both accountants and their clients.

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