QuickBooks Enterprise Solutions
(Multi-user on a network)

We know that installing software can sometimes be stressful. We're here to help! This printable document walks you through the installation process. The installation should go smoothly but if you run into trouble, we have a team of technical experts standing by to help you via telephone. Once your software is installed, you'll be ready to explore all of its great new features.

The installation process happens in three phases:

1. Making sure your company file is ready for the new software.

2. Installing and launching the software on your server.

3. Configuring your network to work with the new software.

Phase One: Making sure your company file is ready for the new software.

Why: It's a great idea to check your company file BEFORE you install the new software so that any data problems can be corrected prior to the installation process. This will allow installation to go much more smoothly. We want to make sure that your company file will be compatible with our new features and security.

1. Verify System Requirements. Make sure your network computers meet the requirements.

a. Go to page 15 of your Installation and Setup Guide to see the new system requirements.

b. You can find the same information on our support web site: http://enterprisesuite.intuit.com/products/enterprise-solutions/?qbes_info=technical

2. The person doing the wellness check must be logged in as the Admin and the Admin account must have a password.

3. Remove special characters like ":," "&", and "/" from the file name. The file extension should be .qbw.

4. Run **Verify Data** on the company file to make sure everything's ready to go.

How to run Verify Data:

a. Exit and restart QuickBooks.

b. In the QuickBooks menu bar, select Window and then select Close All.

c. In the QuickBooks menu bar, select File and then select Utilities.

d. Select Verify Data.

5. You should receive the message, "QuickBooks detected no problems with your data file." If you receive any other message, follow the instructions on the message. You can also contact Technical Support.

6. Don't proceed to the next phase until you receive the message that no problems are detected. You may have to run Verify Data a second time.

Okay, you're done with Phase One!

Phase Two: Installing and launching the software on your server

Removing old versions of QuickBooks:

1. Uninstall all old versions of QuickBooks from the server, including any database managers. In Windows, click Start> Settings> Control Panel> Add or Remove Programs.

Install:

1. Install from **CD**. Click **Server Install**. Select **Database Server and QuickBooks Application**.

2. Follow the installation instructions.

3. Open your company file in the new version of QuickBooks.

4. Sign in as the Admin. QuickBooks will back up your file before it updates it. Once the file is updated, converted, and rebuilt, the file will open.

5. Close QuickBooks.

Okay, you're done with Phase Two!

Phase Three: Configuring your network to work with the new software

Insuring your network is set up to use QuickBooks in a multi-user environment

1. Open the QuickBooks Database Server Manager. In Windows, click Start> Programs> QuickBooks> QuickBooks Database Manager.

2. Click Scan Folders.

3. Add the folder where your company file is located.

4. Scan the folder. Your company file should be listed at the bottom of the window.

5. Close the Database Server Manager.

Running some diagnostics on security settings and permissions:

1. Create a new folder on the desktop and name it “Tool.”
2. Open Internet Explorer and type this URL into the address field: http://support.quickbooks.intuit.com/support/networking/nettool.aspx
3. Enter your email address and Read the Terms and Conditions you must agree to these before you can download and use the Tool.
4. When the File Download window appears, click Open.
5. When the WinZip window appears, click the Extract icon, then browse to the Tool folder you just created.
6. Click the Extract button.
7. When asked for a password, enter “intuit”, then click OK.
8. Now go back to the Tool folder, find the QBConnectivity.exe file and double-click it.

Almost done!

1. When the QuickBooks Connectivity Analysis Tool opens, click Scan Folders.
2. Click Add Folders and browse to the location of your company file.
3. Click Scan. This sets the correct read/write permissions for the folder your company file is in.
4. Click the QB Connection Troubleshooting tab. Network components are checked. Green = this component is okay. Blue = this component might cause problems. Red = this component will cause problems.
5. To open the Windows firewall, click Open Ports.

   Note: If you have a third-party firewall it may or may not be detected here. If it’s not detected, it’s not one of the four (Zone Alarm, McAfee, Norton, and Trend Micro) anti-virus programs the tool specifically looks for. If that’s the case, you’re responsible for making sure that your anti-virus program works with QuickBooks. Click here to view the ports that QuickBooks must have open to work properly.
6. Test connectivity
   a. Browse to the company file. If any components are red, it’s an indication that a port may be blocked or permissions to the folder are not set properly. Click Help for assistance with getting “red” components to turn “green.”
7. Close the Connectivity Analysis Tool.

One last thing to do, install QuickBooks on your company workstations.

1. Insert the CD into the CD drive.
2. Choose “client” install and follow the onscreen prompts.
3. Once installation is complete, launch QuickBooks, then go to the Help menu and register the product.

Congratulations! You’re done!