



REMOTE ACCESS OPTIONS

FOR QUICKBOOKS®

By Madeline Bailey

QC Computing LLC

WWW.QCCOMPUTING.COM

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Chapter 1: Introduction

“Imagine a world in which every single person on the planet is given free access to the sum of all human knowledge?”

*by Jimmy Wales,
Founder of Encyclopedia*

One advantage of global commerce is enjoying the diversity that life has to offer. Whether you want to get away from an oppressive climate to enjoy good weather somewhere else, or stay put at home, it benefits you to control where you live and work.

Whether you want to hire workers from other locations or allow workers who used to come to the office the opportunity to telecommute, it benefits you to employ the best talent you can find and hold onto them for as long as possible.

Sometimes *you* are the talent, and your remote access need is to work from home and dial into the office computer. Other times you may want to travel and dial into your office computer from on the road.

For these reasons and hundreds more, small business owners are interested in gaining remote access to their QuickBooks company data file.

What You Will Learn

This report will inform you of the four basic choices you have when it comes to remote access for QuickBooks; and steer you in the right direction towards finding the right solution for your business.

Here are the four options:

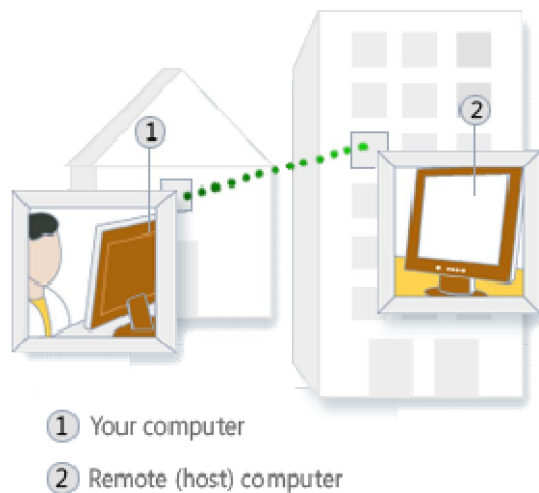
- Windows Remote Desktop Connection (RDC)
- Remote Access Software Services
- QuickBooks Online Version
- Hosted (Desktop) Solution Providers

Client and Host Computers

Here is some basic terminology you need to know.

The computer trying to access another computer remotely is called the Client Computer. (It's called "Your computer" in the diagram below because this is the computer you are sitting at as you access a remote computer.

The computer being connected to remotely is called the Host Computer.



Multiuser QuickBooks

Multiuser means that two users can be in the same database *at the same time*.

With remote access, two or more people can access the QuickBooks company file *at the same time* because they're logging in from different browsers, but the software will stop at least one of you (and perhaps both) from accessing the QB company file unless you own two copies of the software.

The only way you can use a single copy of QuickBooks for two users remotely is if you log in at different times, with the same user name, just as you would on your computer at the office. The software has no idea that you are accessing it through a local computer, or via the internet.

Success, not Perfection

While remote access capabilities feel like a godsend, this is man-made technology—hence not perfect. Remote access technology is not in its infancy, but it's not all grown up yet either. Expect problems during implementation, with eventual success.

Having been in technology since the birth of the PC, I'm comfortable with change and not needing something to be perfect in order to be of great value. Remember when laptops were new? Earlier yet, I purchased one of the first portable computers, made by Compaq². The keyboard folded down to reveal the screen—that is how it was designed to be portable. Bulky and heavy, I joked that it was "luggable", not portable. Just for fun, I've got pictures of generations of computers, printers, and other breakthrough technology on Facebook, while I tend to do most of my



networking on LinkedIn, if you want to join me there?

[LinkedIn - Madeline Bailey](#)

Don't you just love technology?



Remote access services change daily, so internet links are included for you to access the latest information. If you email me your feedback, I will include it in future versions of this free report, so that others can benefit from your experience. Check back from time to time for updated releases of this report, if that interests you.

May you be blessed with great value in life, and occasional perfection!

Chapter 2: Remote Desktop Connection

"The internet is becoming the town square for the global village of tomorrow."

Bill Gates, Microsoft³

Remote Desktop Connection (RDC) - What is it?

Remote Desktop Connection is a Microsoft Windows® technology that allows you to sit at a computer (the client computer) and connect to a remote computer (the host computer) in a different location.

RDC is a great solution because you'll have access to the whole desktop, so you can run QuickBooks software, open email, access your word processor, modify reports in Excel, print from the host, and stay productive over the internet.

Plus, it's as fast as if you were in front of your computer at work.

Plus, it comes with Windows, so it's free.

RDC - How to Set it Up

You should know that the host computer must have Windows Professional® OS. However, the client computer can be running any edition of Windows or even be a Mac.

To get this working properly, I would call my hardware tech. For him/her, it's a relatively simple task.

If you want to learn how to do it yourself, search for "Microsoft Remote Connection" on your favorite search engine, and you will find many articles or videos which will walk you through the process.



On You Tube, I recommend, "Configure and use your Windows 7 Remote Access - Remote Desktop Connection Software", or, "How to use Remote Desktop Connection".

You need the IP address of the computer you want to dial into (host), which won't be a problem if it's your computer. Password the host computer because you're creating an open connection. Speaking of open, you might need to open Port 3389 on your router, and let the remote access user in through the firewall.

If this is more technology than you want to know, contact your hardware tech. For him or her, setting this up is a relatively simple task.

RDC - Advantages and Disadvantages

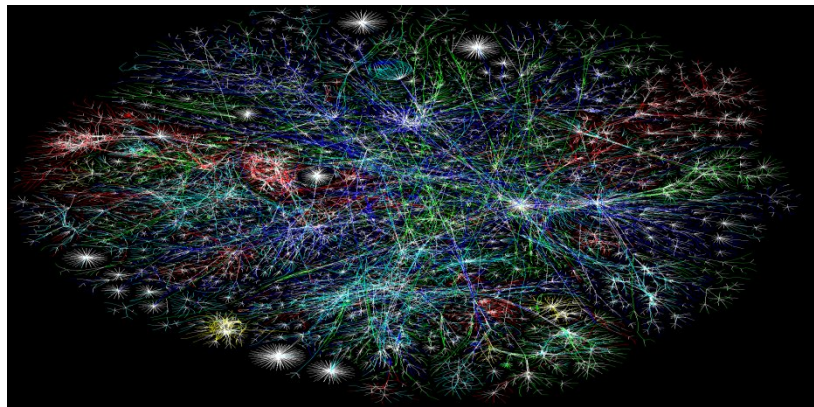
Each time you log into the host computer, you're logging in as a new user, so you can't spy on what you were doing before you left home, or share the screen with another person, but you get complete control over the host computer.

While you are connected, the host computer screen will appear to be blank to anyone who's sitting there.⁴ To say it another way, they will not see your activities so they will not know that you're logged in.

If you want to send print-outs to yourself, here's one way to do it. From Quickbooks, select the PDF report format. Attach the report to an email, and put it into the Outlook folder to be sent next time Outlook is activated. If the report is too big to email, transfer it using an FTP service, such as one of these:

[Transfer Big Files](#)
[You Send It](#)
[DropBox](#)

RDC is wonderful for long distance accounting jobs. It's free. I can take control of the computer when others are out of the office—say on the weekend—and work as fast as possible remotely. This is a miracle considering this is what the Internet looks like from one point of view.



1 Internet Galaxy

Chapter 3: Remote Access Services

"The Internet is not just one thing; it's a collection of things - of numerous communications networks that all speak the same digital language."

by Jim Clark, founder of Silicon Graphics, Netscape Communications Corp, myCFO, and Healtheon⁵

Here are a few popular commercial services for remote access. They don't require an open port, and can bypass firewalls, unlike Remote Desktop Connection (RDC).

In my experience, these services are not as fast as RDC, but they are fast enough to not annoy a power user.

Remote Access is "attended access", which means that someone needs to be there to "let you into" the host computer the first time. Attended access is ideal for remote training, because you and the other person can see the screen at the same time, and trade off using the keyboard and mouse.

My experience with attended access is that once I'm allowed in, as long as the user (my client) has her computer turned on, and hasn't changed anything relative to our link; I can get in again without any additional setup. Of course, my client was there, running her business on another computer, and occasionally glancing over to see me work. This is important, because this report is about working remotely, not doing tech support, or training. You need "unattended" access to work remotely.

Remote Access Services are cloud based services, so they work with a plethora of devices. Basically, if you've got internet access and a browser, you're in.

PC	Mac	iPad	iPhone	Android
√	√	√	√	√



LogMeIn Remote Access Service

Let's start with LogMeIn commercial remote service, because they offer a free introductory version.

Of course, LogMeIn will market the Pro Version to you constantly, in exchange for the privilege of using their free service. As a spoiler, the benefits of paying include the ability to do drag & drop file transfers, remote to local printing, and desktop sharing, among other benefits.



For more information on the differences between the Free and Pro, \$69/Year (\$5.75 month) subscription, click on the link below to see a comparison chart.

[LogMeIn Comparison Chart](#)

Join.me

Join.me is a screen sharing service. Lots of people talked about it, and now that I've used it, I become a fan too. Join.me is a spin-off business of LogMeIn.

Screen sharing has two uses—webinars and remote access. Join.me has a free version, where you get to see your entire desktop, and file transfer privileges. Of course, you'll be marketed to death to use the pro version, which is \$19 month (\$149/year).



To learn more about Join.me visit this link:

<https://join.me/>

GoToMyPC

This is another popular remote access service. While it's a little more expensive, techie-types say it works on systems where LogMeIn has problems.

You can try it for free for 30 days, and then it's \$9.95/month (\$99/year) for each computer you want to access. If you only want to access your home computer from the road, that's one computer.



To learn more about GoToMyPC go to their website:

[GoToMyPC Web Link](#)

WebEx

You might know WebEx by Cisco Systems Inc. because you took an online webinar hosted by WebEx.

WebEx is a remote access solution too. Intuit endorses WebEx with two monthly subscription offerings:

1. QuickBooks Data File Access Only
2. Entire Desktop Access

1. Intuit/WebEx – QB Data File Access Only

Intuit/WebEx has a stripped-down service where you can access the QuickBooks company data file only. This costs

\$3.95/month, (that's \$48/year). (See below for Intuit's WebEx Free Small Print to see if you qualify for free or discounted rates.)



QuickBooks Data File Only access does not work with **Quickbooks Pro for Mac** software at this time. But if you're on a Mac, the Entire Desktop Access will work for you. It's recommended that you use the Safari browser.

2. Intuit/WebEx – Entire Desktop Access

Most people are going to want access to the entire desktop of the host computer anyway. Plus, at this level, if you have internet access, you have access, so you don't have to worry about Mac vs PC. At this level, QuickBooks desktop software doesn't know the difference between you accessing it via the internet or being physically present in front of the computer.

PC	Mac	iPad	iPhone	Android
√	√	√	√	√

Under this plan, you have two options. 1 computer costs \$7.99/month (that's \$96/year), or 10 computers costs \$69.95/month (that's \$839.40/year).

The 1 or 10 computer limit means *at the same time*. At any time you can drop one computer and add one new one, as long as your list doesn't go over 1 or 10 at any one time.



Victoria Marechal, QuickBooks Expert Los Angeles, CA, <http://ww.qb-it.net/>, reports the following on 8/2013:

"Just want to give you heads up on my recent discovery regarding the QB WebEx option. It doesn't work with Firefox 22..... And there wasn't advanced notice either.

The WebEx help desk responded to me, *"Please note that the latest Firefox versions are not supported on QuickBooks*

Remote Access. If the issue persists, I'd recommend using Internet Explorer or downgrading to Firefox 20."

Victoria setup **TeamViewer** as her connection platform. **TeamViewer** offers free All-In-One Software for Remote Support and Online Meetings. For more information, see their website:

<http://www.teamviewer.com/en/index.aspx>

WebEx Setup

WebEx is "easy to setup". At least that's what marketing people say to convince you to buy something, or what people (including me) say *after* we have it figured out! I'm joking, but not entirely. All technology is a learning process, don't you agree?

Here is how easily it's setup. Once you have established a WebEx account, go to the WebEx site, and enter the user's email address and some pass codes. WebEx sends the user (host) a link to establish the connection. Once the user (host) has installed the link, go to the WebEx Center to access their desktop.

Clients complained that the link didn't work correctly. The first time, I was able to get tech support right away, but the next time not until the next day. I learned that when clients complain, just send them a new email, with a new link. Eventually, they'll get one that works.


Intuit's WebEx Free Small Print


For customers only, here is the small print. (*Get QuickBooks Remote Access FREE for 12 months with QuickBooks Premier or Enterprise purchase. Or get 6 months for FREE with QuickBooks Pro purchase. This offer includes access to QuickBooks data only for one user. Or access all your PC files and applications for an additional \$4 per month (that's \$48 year)). (Valid for customers who purchase and install QuickBooks Pro 2013, QuickBooks Premier 2013 or Enterprise Solutions 13.0 software*

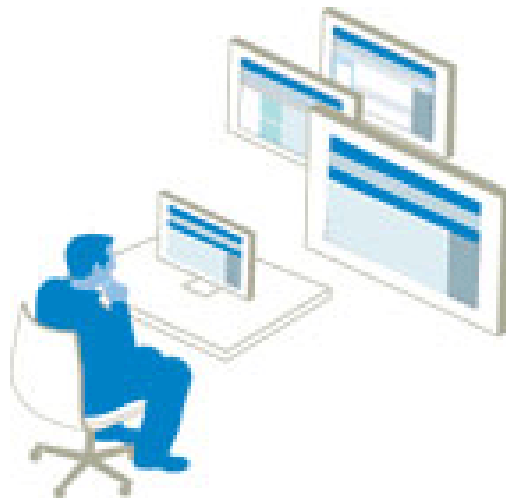
before 12/31/12. QuickBooks Remote Access does not work with QuickBooks Pro for Mac or QuickBooks Online Edition. Offer does not apply to QuickBooks Pro Plus or QuickBooks Premier Plus.

For ProAdvisor's only, here is the small print. *As part of your program fee, you get 2 QB to QB data file connections, or Desktop Access for 1 computer for \$7.99 month (that's \$95.88 year).*

 You can sign up for WebEx from inside of QuickBooks. Go to the top line **File** Menu -> **Remote Access** to sign up.

 Or call Intuit at 1-800-825-8168 for help.

 For Cisco WebEx directly, call a WebEx solution specialist at 1.877.GOWebEx (469.3239) or visit this link: <http://www.webex.com/solutions>



Chapter 4:

QuickBooks Online

"We're still in the first minutes of the first day of the Internet revolution."

by Scott Cook, founder of Intuit Corp.⁶

QuickBooks Online is cloud software. You don't have to worry about carrying your laptop with you, or Mac vs PC. As long as you have internet access and a browser, you've got access.

PC	Mac	iPad	iPhone	Android
√	√	√	√	√



Advantages

QuickBooks Online is an ideal solution for one client who travels to a foreign country without his laptop for security reasons, but for the purpose of doing business there. He needs to be able to enter invoices as he makes sales, find out who owes him money, and access other information to make new deals.

With another client I did a cool thing where QB Online became the front end solution for the various sales people to log in and record invoices, plus he uses it to keep

track of inventory. Then we used QB Desktop Version as a back end software solution for bank reconciliation, GL, & financial reports. I move over sales and cost of goods figures monthly from Online to Desktop for the P&L Report and Balance Sheet.

The obvious advantage of QB Online is that it's cloud-based software. The user (my client) doesn't have to leave their computer turned on for me to access their QuickBooks software. This is an advantage of hosted Quickbooks too, which we will cover in the next chapter.

Disadvantages

Some people (including me) think that QuickBooks Online is more expensive, slower due to online software limitations, and offers limited functionality compared to the Desktop Versions.

It's hugely profitable for Intuit, so they're investing in it heavily. Therefore, I am slowly starting to change my opinion about the limited functionality.

Also, while Intuit is going to back up your data file nightly, they're only going to backup the one most recent file. You can't have a few generations of your data backed up, download the backup file, or implement my trick of making a copy of the file right after you close out the year.

For more information on the differences in speed, please see my blog post:



[QB Computing Blog Post on Why QuickBooks Online is Slower than Desktop](#)

Transferring Data from Desktop ↔ Online

Whatever decision you make now—QuickBooks Online or QB Desktop—doesn't have to be final. You can always move your data from QB Desktop to QB Online and/or back again. Moving data from Desktop to Online is

easy since Intuit wants you to move to a subscription based model. If moving data back to the desktop version is a problem, you can hire me to do it for you.

Pricing

There are three QB Online products:

1. Online Simple Start

1 User Max

\$12.95 month (that's \$155.40 year)

Very low end—only 1 bank account & credit card, 20 reports.

2. Online Essentials

\$26.95 month (that's \$323.40 year)

3 Users Max

Unlimited bank accounts, etc., 40 reports

Can add payroll, US only, additional costs apply.

3. Online Plus

\$39.95 month (that's \$479.40 year)

5 Users Max

All of the lower ones, plus Inventory, Purchase Orders,

Class, Time Tracking, Sales Tax, and 1099's (filed

electronically only and 65+ reports

Can add payroll, US only, additional costs apply.


Your business can scale up to purchasing remote access for up to 20 users for \$63/month (that's \$756/year).

Your Pro-Advisor can call Intuit and get you a discount off your monthly rate. I'm diamond level, so I can get my clients 35% off their next monthly or yearly bill. This is discount, not a credit, so it always applies to a future bill.

If you want this discount for your first bill, you have to have a 3-way call with you, the pro-advisor, and Intuit sales rep on the phone at the same time.

[Click Here to Order QB Online -- Try for 30 Days!](#)



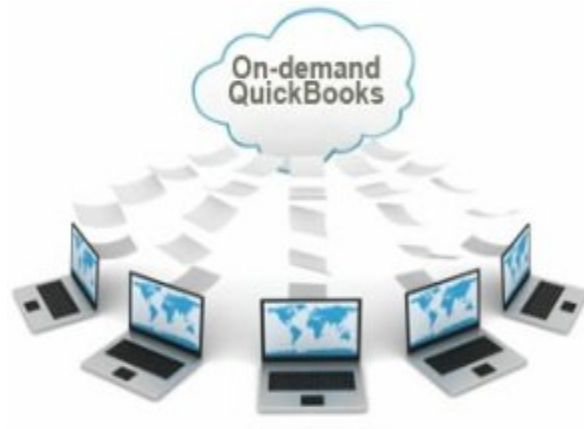
 For more information on the various features and various offerings, please go to this internet link near you:
[QuickBooks Online Products Cost/Benefits Chart](#)

Chapter 5: Hosted Solution Providers

“Well, another market is now being created out of Internet technology”

*by Jim Barksdale,
Netscape⁷, 1995*

What is a hosted solution?



A hosted solution is a way to rent remote computer space and from a service provider who hosts your software. For the benefit of the QB Desktop software with anytime / anywhere remote access, hosted access is the solution.

PC	Mac	iPad	iPhone	Android
√	√	√	√	√

Still too expensive for many small business owners, costs range from \$25 - \$50 *per user, per month*. I haven't had the opportunity to test out any hosting providers for myself *yet*. The operative word is "yet". Feel free to be the first person to hire me. Hosted solutions are the future.

Lease or Purchase QuickBooks

You either give the Hosted Solution Provider your purchased copies of QB to install for you, or you can lease QB software from them.

- **Purchased Software:** Some people update Quickbooks yearly, but you don't have to. Intuit requires you to update purchased software every three years if you want any supported or connected products or services, such as tech support, payroll, connected services, online backup, or merchant services

I can offer you 20% off your software purchase, plus free shipping via my website link. For example, QB Premier is \$319 via my website with a 20% off discount and free shipping. (\$319/ year (that's \$27/month for 1 year), or (\$9/month for 3 years)).

Save on QuickBooks Products and Services

- **Leased Software:** If you lease software from the HSP, it's often another \$10 month per user (that's \$120/year) with updates included in the price.
- **QB Enterprise Version:** Intuit does not allow Enterprise to be leased, so you'll have to have own it and allow the HSP install it for you. Intuit requires Enterprise to be updated yearly.

Intuit Authorized Commercial Hosting Companies



Below is a list of companies authorized by Intuit at the time of this report. Being Intuit authorized means they're allowed to lease QuickBooks, because they're known and accredited by Intuit Inc.

Right now, Skyline might be the cheapest. They are not on the list, because they are a rebranded Uni-Data (that is on the list). This is a very new industry so expect changes and start-up behavior:

[Skyline Cloud Services](#), Telephone: (718-312-3265)

[Cloud9 Real Time](#) Telephone: (888) 869-0076

[Coaxis International, Inc.](#) Tel: (850) 391-1022

[Harborcloud](#). Telephone: (877)-294-2909

[Infinity Virtual](#). Telephone: (866) 257-8455

[InsynQ, Inc.](#) Telephone: (866) 206 1781

[myownasp](#). Telephone: (800) 521-7322

[nGenx](#). Telephone: (888)-696-4369 x4

[NovelAspect.com](#). Tel: (888) 228-0143

[Proxios](#). Telephone: (804)-342-1200

[Outera](#). Telephone: (800) 969-9524

[Real Time Data Services](#). Tel: (888) 408-6044

[Right Networks](#). Telephone: (888) 417 4448

[Swizznet](#). Telephone: (888) 794-9948

[Uni-Data & Communications, Inc.](#) Tel: (718) 445-5600 x3180

[Xcentric](#) Telephone: (678) 297-0190

[WY Technology](#). Telephone: (858)-748-1600, ext 333

If you have your own copy of Quickbooks software, and want it hosted for personal use, you can use any provider, such as [Rackspace Hosting](#) or [Amazon Web Services \(AWS\)](#).



If you want help with choosing a Hosted Solutions Provider, Joanie Mann, Cooper Man Consulting, has a firm that specializes in helping you find the best hosted solutions provider. Visit her website: [Cooper Mann Consulting](#) for more information and to contact her.



Questions To Ask Prospective Providers?

Here is a guide to the type of questions you'll want to ask. First the questions are in long form. On the following page, they're in chart form. I would have included a chart outlining offerings and prices, but this information changes daily.

You're going to want to rent the least amount of services you need for each user, and different users may have different needs, so you might even want to fill out a single chart per user, per hosted solution provider.

- **Users:** How many users do you want hosted? Does the HSP require a min number of users?
- **QuickBooks Software:** Own your own software, or lease from the HSP?

- **Microsoft Office:** Do you need to lease Microsoft Office (Outlook, Excel, and Word)? Do they have a Service Provider License Agreement (SPLA) with Microsoft? Or can you export data from hosted QuickBooks to your computer to work with Microsoft Office? If you want both, does your version of Microsoft Office match the one on the host?
- **Other Software:** Do you need other software hosted, such as apps, or Point of Sale? Are there restrictions on the types of applications you can add to your service?
- **Installation Fees:** Are there installation fees?
- **Cancellation Fees:** Are there fees to leave the service? How hard is it to get your programs and data back?
- **Other Fees:** Are there other fees you should factor in to get total monthly costs?
- **Hardware:** Do you have special hardware needs—such as network printing, dual monitors, or scanning to upload documents?
- **Backups:** How many days of backups do they keep? How easily can you get your backups? Do you want to backup locally, and can you?
- **Tech Support:** How easy is it to get tech support?
- **Customer Support:** How you feel about the company is important too. You're not just renting hardware space; you're renting a service as well. Add your customer service score as "other considerations".

In the end, who do you like, and why? If you email me your feedback, I will include it in future versions of this free report, so that others can benefit from your wisdom. Check back from time to time for updated releases of this report. Thanks!

Hosted Solutions Provider Comparison Chart

<i>Hosted Solutions Provider Name:</i>		
<i>User:</i>		
<i>Question</i>	<i>Per Month</i>	<i>Per Year</i>
Access Cost (Per User)		
Software Leasing Cost		
Microsoft Office Cost		
Additional Software Costs		
Installation Fee		
Cancellation Fee		
Special Hardware Needs?		
Backups?		
Tech Support?		
Other Considerations?		
Total Cost Per User?		

Chapter 6:

Definition of Terms

Attended Access or Attended Support — This means that someone needs to be there to "let you into" or "let you have access" to their computer. The opposite of attended is unattended access or unattended support.

Client Computer — This is the computer you are dialing in from. Or to say it another way, this is the computer you're sitting at as you are trying to access another computer.

Cloud Computing – This is the use of computing resources (hardware and software) that are delivered as a service over a network (typically the Internet). The name comes from the use of a cloud-shaped symbol as an abstraction for the complex infrastructure it contains in system diagrams. Cloud computing entrusts remote services with a user's data, software and computation.⁸

Host Computer — This is the computer you are trying to dial into. It's going to "host" your attendance.

Multiuser — This means that more than one user shares the same database at the same time. The opposite of multiuser is single user.

Unattended Access or Unattended Support — This is a way to access a computer so that no one needs to be physically present to "let you in". As long as you have the correct login user name and password, you can get in.

Chapter 7: About the Author

"You want to count your blessings, and money is a blessing."



Madeline Bailey consistently ranks as one of Intuit's top-rated **Enterprise, Online and Advanced Certified QuickBooks Professional Advisor** in the greater Seattle, WA area.

Ms. Bailey provides business analysis, consulting, and accounting, either at your place of business, or by remote access, or both. Joy Jose provides bookkeeping services for continued financial management.

The goal of everyone at QC Computing LLC is to empower private business owners to make more profit. This liberates your energy so that you make your dreams become reality.

Consulting vs. Tech Support

When I was first figuring out how remote access works, I hired people to help me, and paid for services so that I could get tech support. Free products and services rarely, if ever, come with tech support. I would say free products never come with tech support, but someone will find an exception and prove me wrong.

I love tech support. I get that you love it too. I could spend every minute of every day answering tech support calls. Unfortunately, I'm not setup to provide tech support or

answer "just one question". I'm setup to work as a consultant and an accountant.

I never tire of hearing about your business and accounting challenges. I'm happy to help you even if you just want a single 4-hour afternoon session, which is our minimum for new clients.

It's the retainer clients who pay our bills, so thanks to them that this Free Report could be written. Our policy is to be paid on retainer or by check at time of service.

Please contact me if I can be of service to you. You can call or email directly from the website:

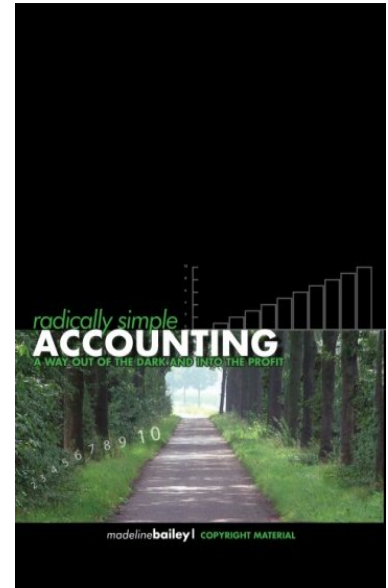
Website: www.qccomputing.com/about-us

Radically Simple Accounting Book

Madeline Bailey is author of the book, *Radically Simple Accounting*. If you like this free report, you'll love the book.

For more information, and book reviews, click here: [Radically Simple Accounting Book](#).

The book is published in a variety of formats, including Trade Print, Audiobook, and eReader. It is sold everywhere books are sold, including the following:



Trade Print Paperback:

[Trade Print Book -- Amazon.com](#)

Sold by online retailers, plus any brick & mortar bookstore or library can easily order it for you.



eBook, in PDF format:

[eBook -- QC Computing Website](#)



Audio Book:

[The Audiobook Store](#)

Also sold by every online audiobook retailer.



eReader Book:

(Can be read on tablets & reading devices, such as iPhones, iPads, Nook, and Kindle).

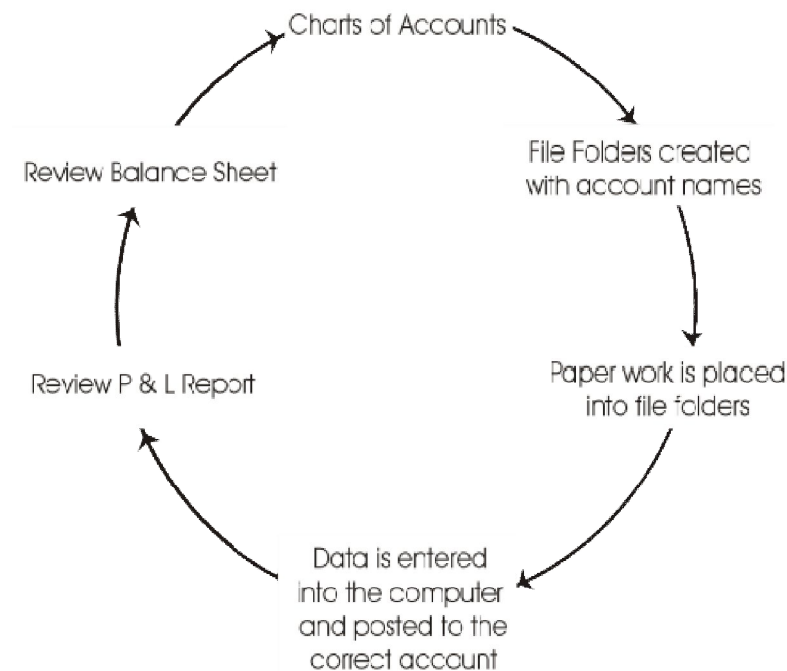
[Smashwords.com](#)



Radically Simple Accounting training videos are not yet complete, but if you put your name on the email list, you will receive a notification.

When you read or listen to *Radically Simple Accounting*, you'll learn the following, and more:

- How to design a chart of accounts that's ideal for your business.
- Accounting basis, basics, and terminology that you need to know to be in business today.
- The two basic accounting reports that every business owner needs to pay taxes: the Profit and Loss Report and the Balance Sheet.
- How to use financial reports to improve your profit!



Once you have completed the entire process of automating your accounting, your business may become a great deal more profitable.

Many clients want to use their newfound profit for what they call, “a hard-earned, long-overdue vacation”. On said vacation you can log in remotely. Or not. You say not? What would you do with more profit?



End Notes

¹ Microsoft Website FAQ, <http://windows.microsoft.com/en-US/windows-vista/Remote-Desktop-Connection-frequently-asked-questions>

² Compaq Computer Corp.

³ Robert J. Cracken, www.brainyquote.com

⁴ Microsoft Website FAQ, <http://windows.microsoft.com/en-US/windows-vista/Remote-Desktop-Connection-frequently-asked-questions>

⁵ Jim Clark, www.brainyquote.com

⁶ Scott Cook, www.brainyquote.com

⁷ Robert J. Cracken, www.brainyquote.com

⁸ Cloud Computing definition, Wikipedia

