

Are you coming here to install Accounting Link?

No. Everything will be done through remote access of your computer and over the phone.

How long will the installation take?

We schedule one hour for the installation. We will schedule more time if we think it is needed based on your unique situation, such as a remote server or multiple locations.

What do I need to have ready before the appointment?

Your shop management software and your accounting software (such as QuickBooks) need to be installed.

Also, you will need to have a Chart of Accounts setup, unless you would like to use our template.

Will we be able to use our shop management software while Accounting Link is installed?

Yes. Only the computer on which Accounting Link is being installed will be busy.

Will we be able to use QuickBooks while Accounting Link is installed?

Yes. Only the computer on which Accounting Link is being installed will be busy.

Does my IT person need to be here?

No, we typically do not need an IT person present. We are very familiar with most systems. We may need an IT person available, for example, if the computer we are installing Accounting Link Desktop on requires administrative permissions to run installs and/or create folders. If we are setting up Accounting Link Online, an IT person will not need to be available for the appointment.

Where will Accounting Link be installed?

Accounting Link will be installed on the computer that has QuickBooks (or your accounting software) on it and where the daily processing will be done.

Does Accounting Link have to be installed on the server?

No. Accounting Link can be installed on the server, but it is not necessary. It can be installed on any workstation that has QuickBooks on it and has access to the shop network.

We can also install Accounting Link on a PC outside of the shop network and have the data sent to this remote location (such as a home or corporate office) if needed. Just let us know you need this type of setup.

Who should sit in during the installation and training?

You may have anyone sit in that you'd like. We recommend that you include the person who will be doing the daily processing and whoever can answer basic questions about how you'd like the data to appear in your accounting software.

Does my accountant or CPA need to be here?

Although Accounting Link may be installed without your accountant or CPA present, his or her involvement in the setup can be very helpful. We are a team of trained accountants and are happy to guide you through the process, but we welcome the insight

your accountant or CPA can provide. The decision is up to you. If you prefer, you may also have your accountant contact us directly anytime he or she has questions.

Do I need to setup a new QuickBooks company file?

No. Accounting Link will work with your existing company file.

Do I need a new Chart of Accounts?

No. Accounting Link will work with your existing chart of accounts. If any additional accounts are needed, we will discuss them and create them during the installation appointment.

Should I wait until the beginning of the month (or year)?

This decision is up to you, it is a matter of personal preference. Accounting Link may be started at any time. The only thing to keep in mind when choosing a start date is that we do not want to duplicate any sales, deposit, or accounts payable information that you may have already entered into your accounting software.

When does it start to work?

Accounting Link starts as of the start date we assign. It can be the current date, a date in the past, or a future date.

When will I get training?

We always train with live data, so we schedule training to allow 3 business days to accumulate in Accounting Link. If your start date is the date of the installation, we will schedule training for 4 business days later.

How long is the training appointment?

The training appointment lasts one hour. We will teach you how to do the daily processing and process 3 days of activity together.