# Intel AppUp® SMB Service
Built on the Intel® Hybrid Cloud Platform

# Initial Setup Guide – QuickBooks Premier 2012*

Revised 2/15/2013

This guide is intended to identify the steps required to install this software on the Intel® Hybrid Cloud platform, and does not replace the manufacturer's instructions for third-party products. Before completing the instructions below, you will need to install the respective software on the server using the Store feature in the Intel Hybrid Cloud Management Portal (https://hybridcloud.intel.com).

**LICENSE ALERT**: Purchased keys may not be used on this product.

## Contents


Product Version....2
Dependencies / Requirements....2
Appliance Default Passwords....2
Download and Install....2
QuickBooks Recommended Configuration....4
QuickBooks Premier Installation on Intel Hybrid Cloud Appliance....4
Configure the Server for Network Access....8
Share Install Files on QuickBooks Server....10
Acquire License Key....10
QuickBooks Premier Installation on Windows Workstation(s)....10
Creating the Company File in the Shared Location....11
Running the Database Manager....15
Uninstall – This is a two-step process.....19
Troubleshooting....19
  Technical Support....19

# Product Version

Intuit QuickBooks Premier 2012

# Dependencies / Requirements

- Windows Small Business Server 2011* or Windows Server 2008 R2* appliance on Intel® Hybrid Cloud server. This is where the QuickBooks* shared database will be located.
- Windows 7/XP/Vista located on customer's LAN. This is where the QuickBooks clients will be installed.

# Appliance Default Passwords

To download the current "Appliance Default Password List" (Login required):

1. Use a Web browser to go to: www.intelhybridcloud.com/.
2. Click the **Login** link and enter your login information.
3. At the top of the page, select **Menu** and then click the **Support** link.
4. On the Support page, click the **Server Setup & Activation** section to expand it and then click the **Additional Setup Documents** link.
5. Click the Additional Setup Documents zip file version that you want to download and then select to save the zip file.
6. Extract the Appliance Default Password List from the zip file.

   NOTE: The default, out-of-the-box experience allows you to specify the passwords for the Microsoft* Windows*-based appliances during configuration. For Linux* appliances, type "passwd" in the shell.

# Download and Install

1. After ensuring that the dependencies and requirements listed above are set up, go to the Intel AppUp® SMB Service store at: https://store.intelhybridcloud.com.
2. Log in using your MSP ID and password.
3. Search for **QuickBooks Premier**.
4. You will be presented with three options for **QuickBooks Premier**.
   a. **Intuit QuickBooks Premier 2012** – This option will create a folder on the target VM called c:\QBPREMIER2012. This folder contains the setup files necessary to install the **QuickBooks Premier** shared database on the VM and the **QuickBooks Premier** client on end-user workstations.
   b. **Intuit QuickBooks Premier 2012 (Single User License) –** This option will create a folder on the target VM called c:\QBPREMIER2012_1_user_product_number. This folder contains a text file with the product number for the single user license of **QuickBooks Premier**. This option also enables a button on the MSP portal to have single user license keys emailed to the MSP's email address. Each time this button is clicked, a new license key will be emailed to the MSP. Usage will be billed for each license key that is emailed to the MSP. License keys are not needed to install the shared database on the VM, but will be needed when installing the **QuickBooks Premier** client on end-user workstations.



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.

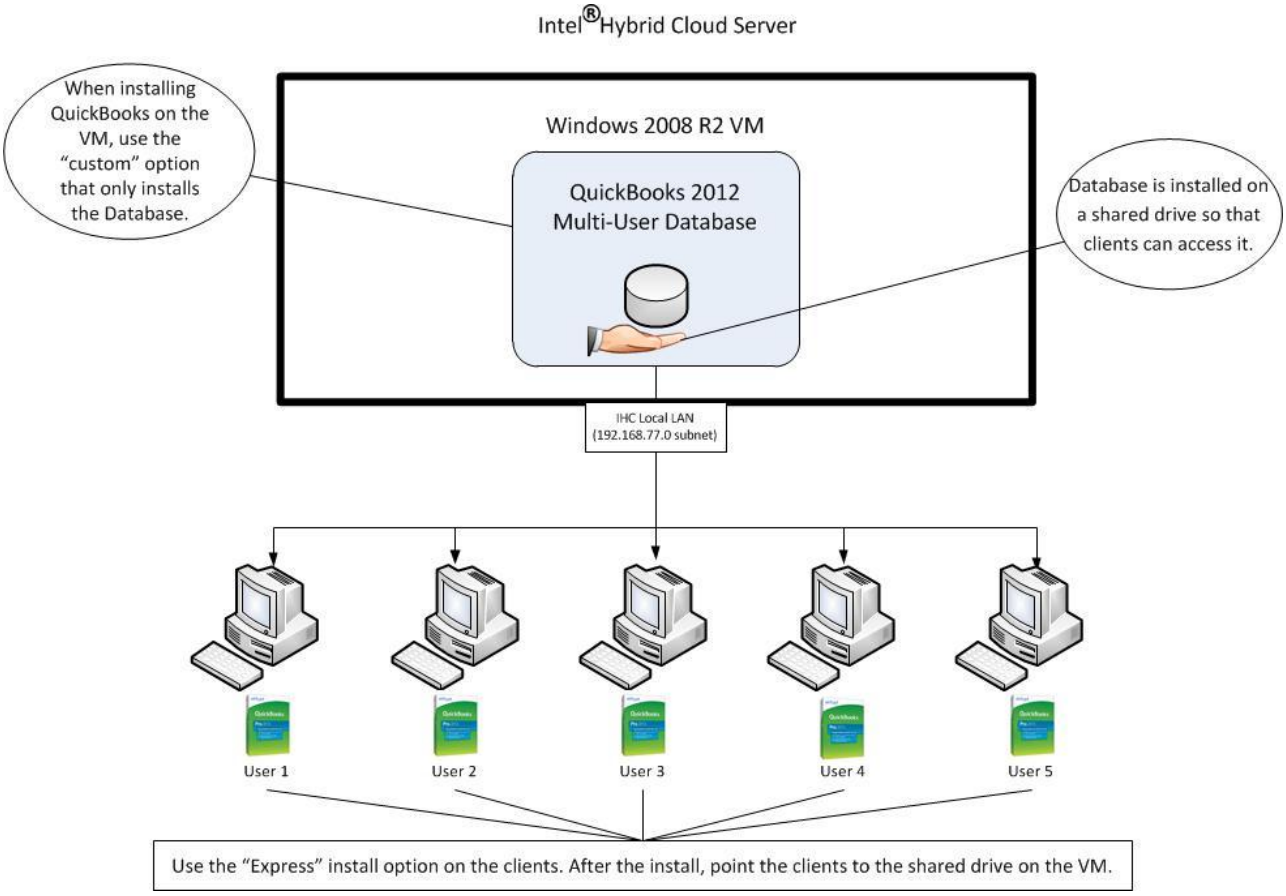
c. **Intuit QuickBooks Premier 2012 (Three User License) –** This option will create a folder on the target VM called c:\QBPREMIER2012_3_users_product_number. This folder contains a text file with the product number for the three user license of **QuickBooks Premier**. This option also enables a button on the MSP portal to have single user license keys emailed to the MSP's email address. Each time this button is clicked, a new license key will be emailed to the MSP. Usage will be billed for each license key that is emailed to the MSP. License keys are not needed to install the shared database on the VM, but will be needed when installing the **QuickBooks Premier** client on end-user workstations.

5. It is recommended to add all three options to the cart when purchasing **QuickBooks Premier 2012.**
6. Select the Intel® Hybrid Cloud server.
7. Select the Windows appliance where you want to install **QuickBooks Premier**.
8. Click **Add to Order**.
9. Complete the ordering process. The application will download within 24 hours.



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.

# QuickBooks Recommended Configuration




# QuickBooks Premier Installation on Intel Hybrid Cloud Appliance

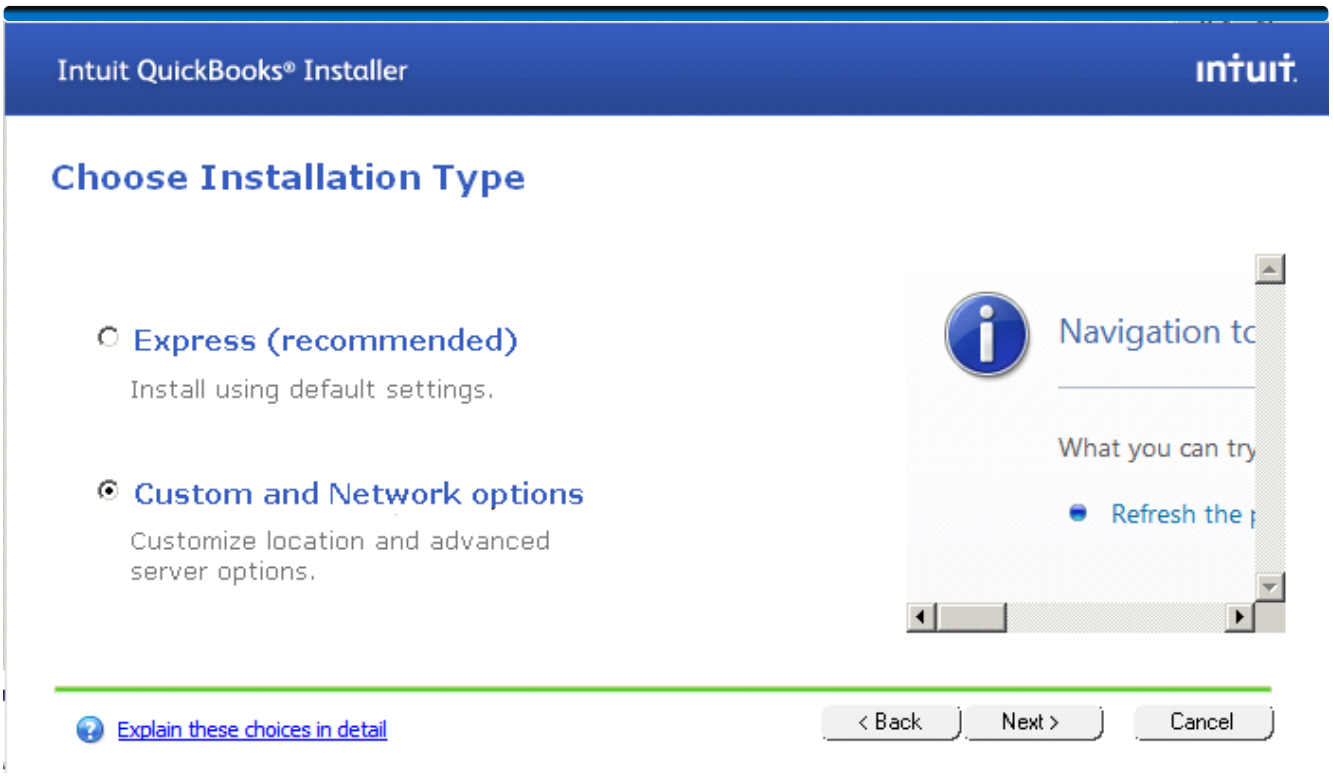
In order to start **QuickBooks Premier** Installation, please navigate to dir **C:\QBPREMIER2012** on your Intel Hybrid Cloud appliance and double click on the Setup.exe file.

Make sure Internet connectivity is available.

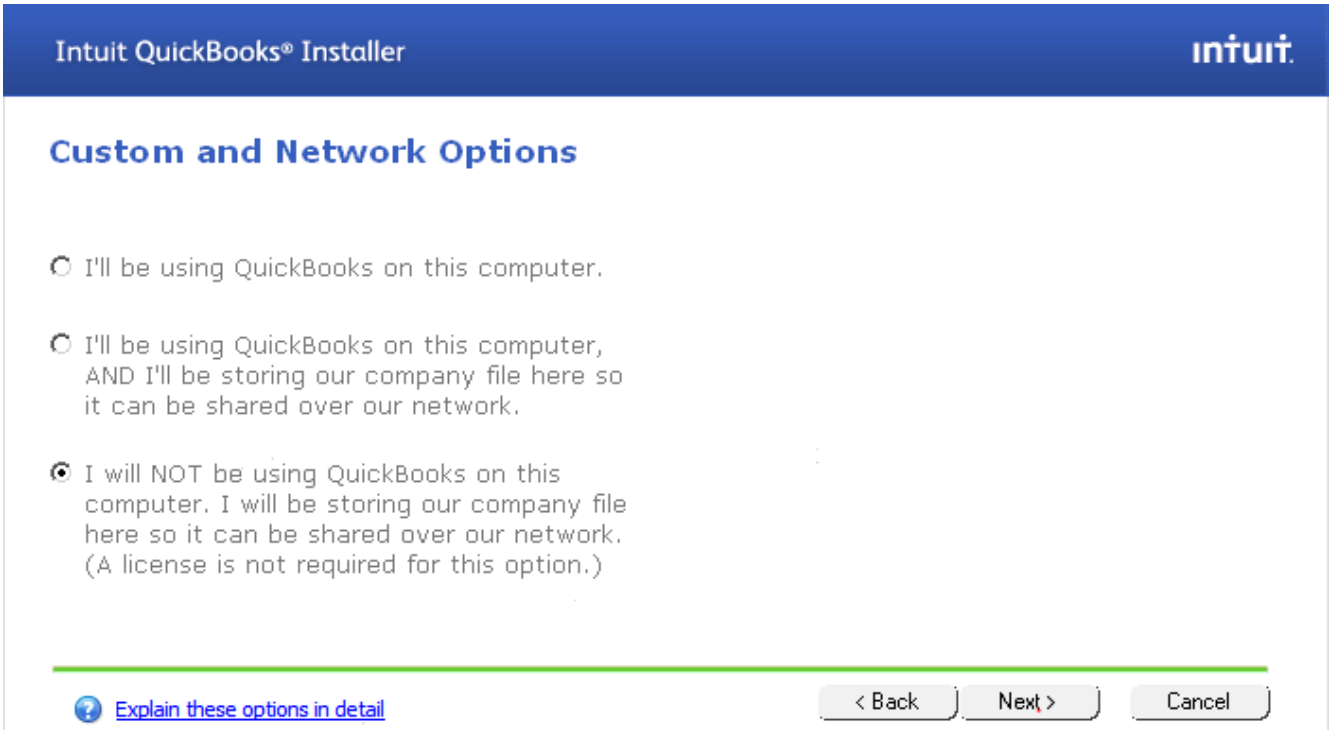
Begin the installation process, stepping through the appropriate screens until you get to the "Choose Installation Type" screen.



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.



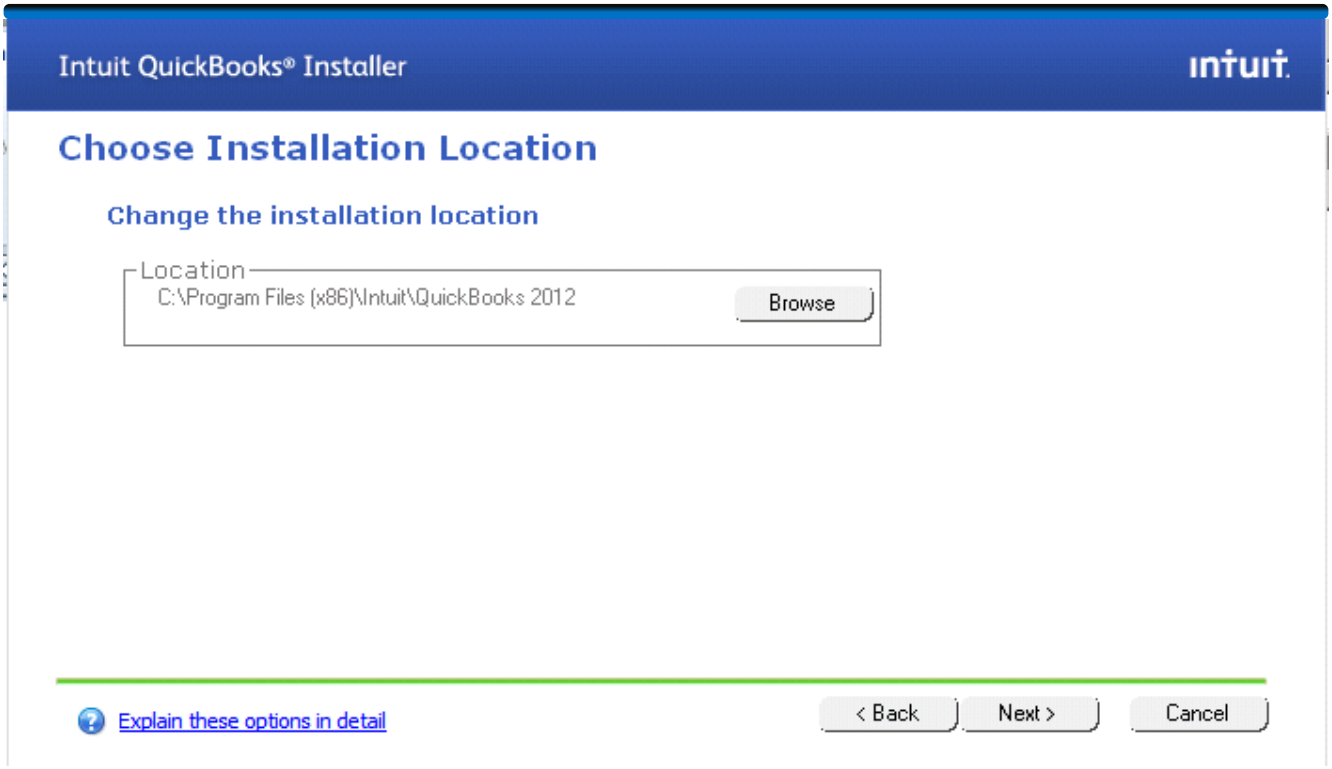

Select **Custom and Network Options** and press **Next** button.



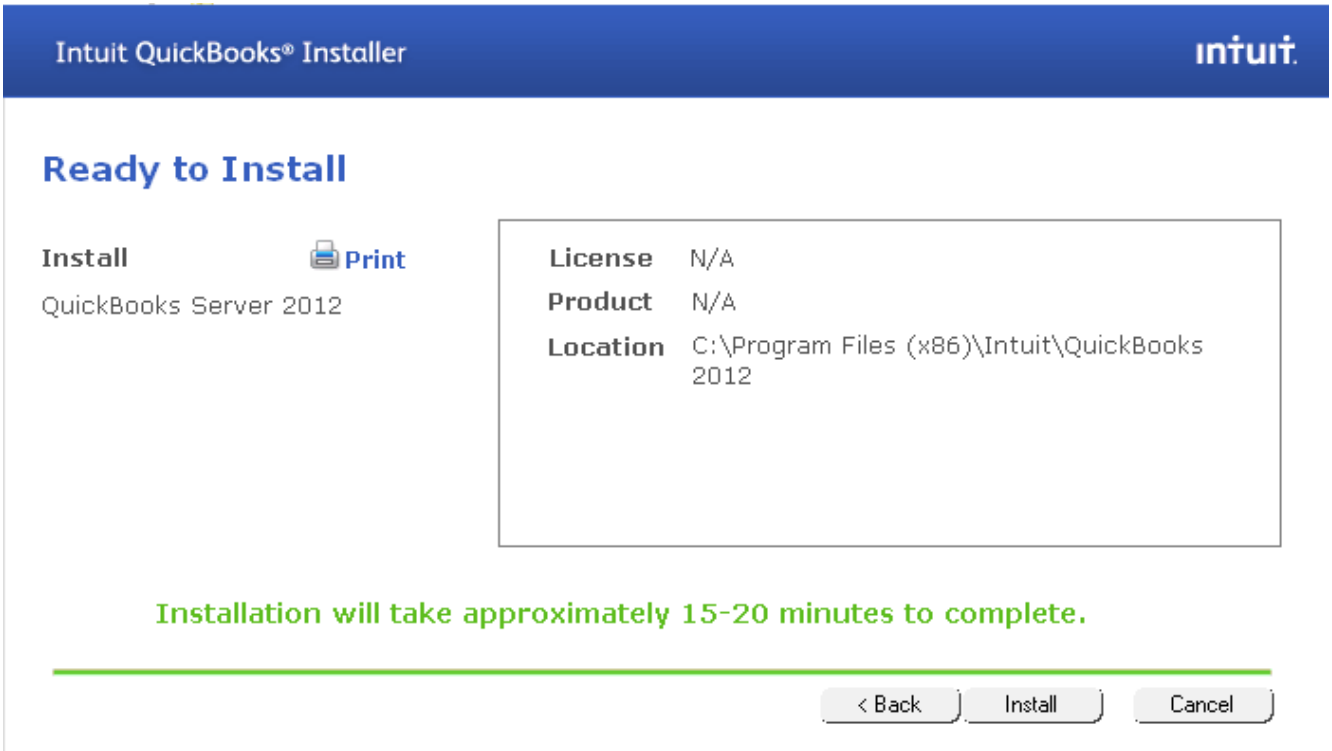

Select the third option as above and then click **Next**.



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.



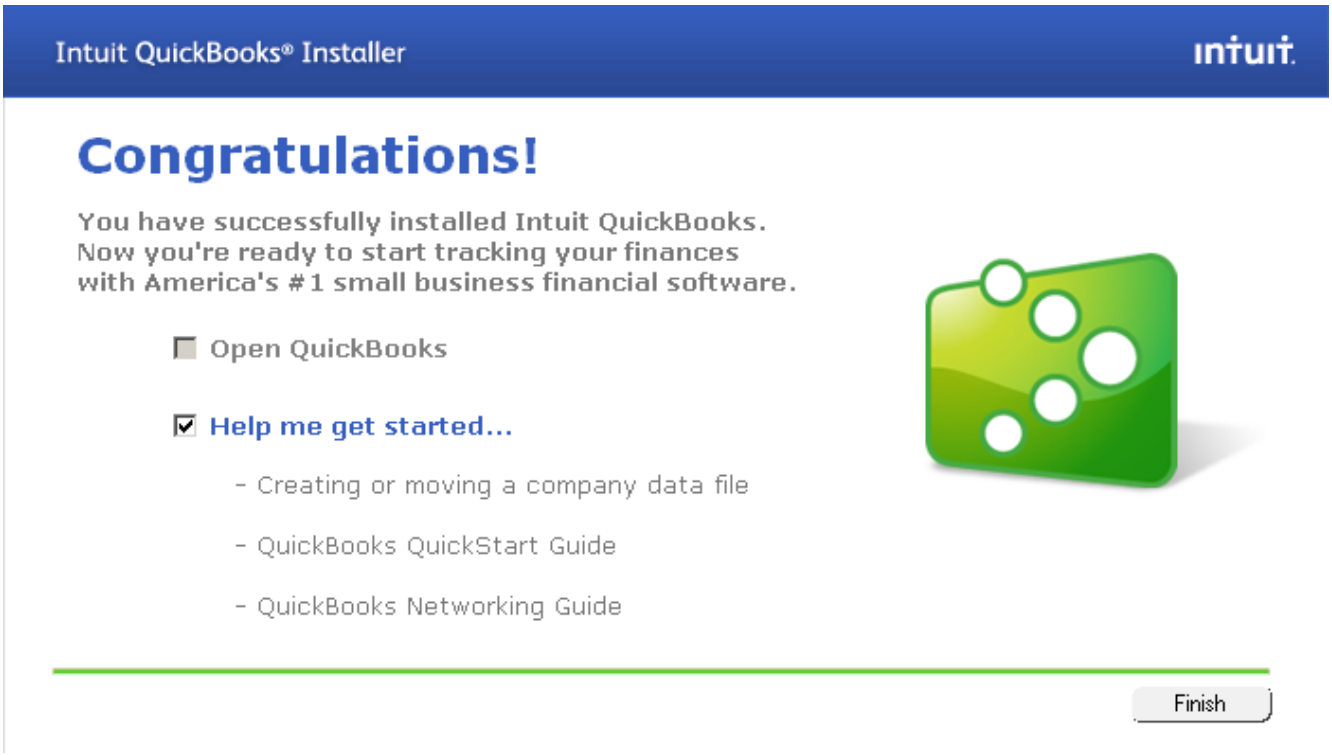

You may change installation location by browsing the desired location or leave it unchanged and press **Next** button.




Press the **Install** button to proceed.



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.

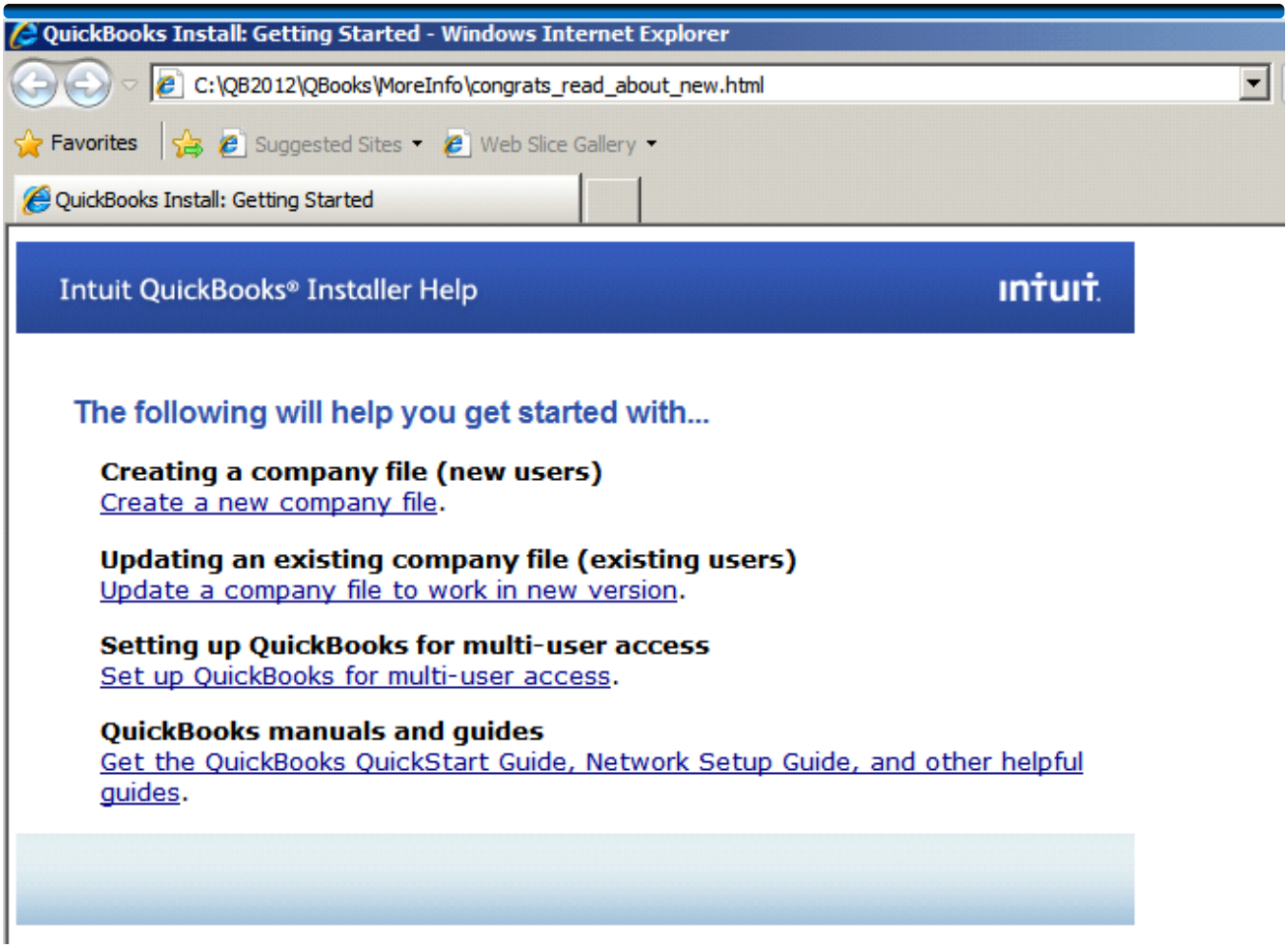



By default, the checkbox **Help me get started** will be selected. Click **Finish**.

**You will be presented with a web browser containing links to helpful resources as shown below**:



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.



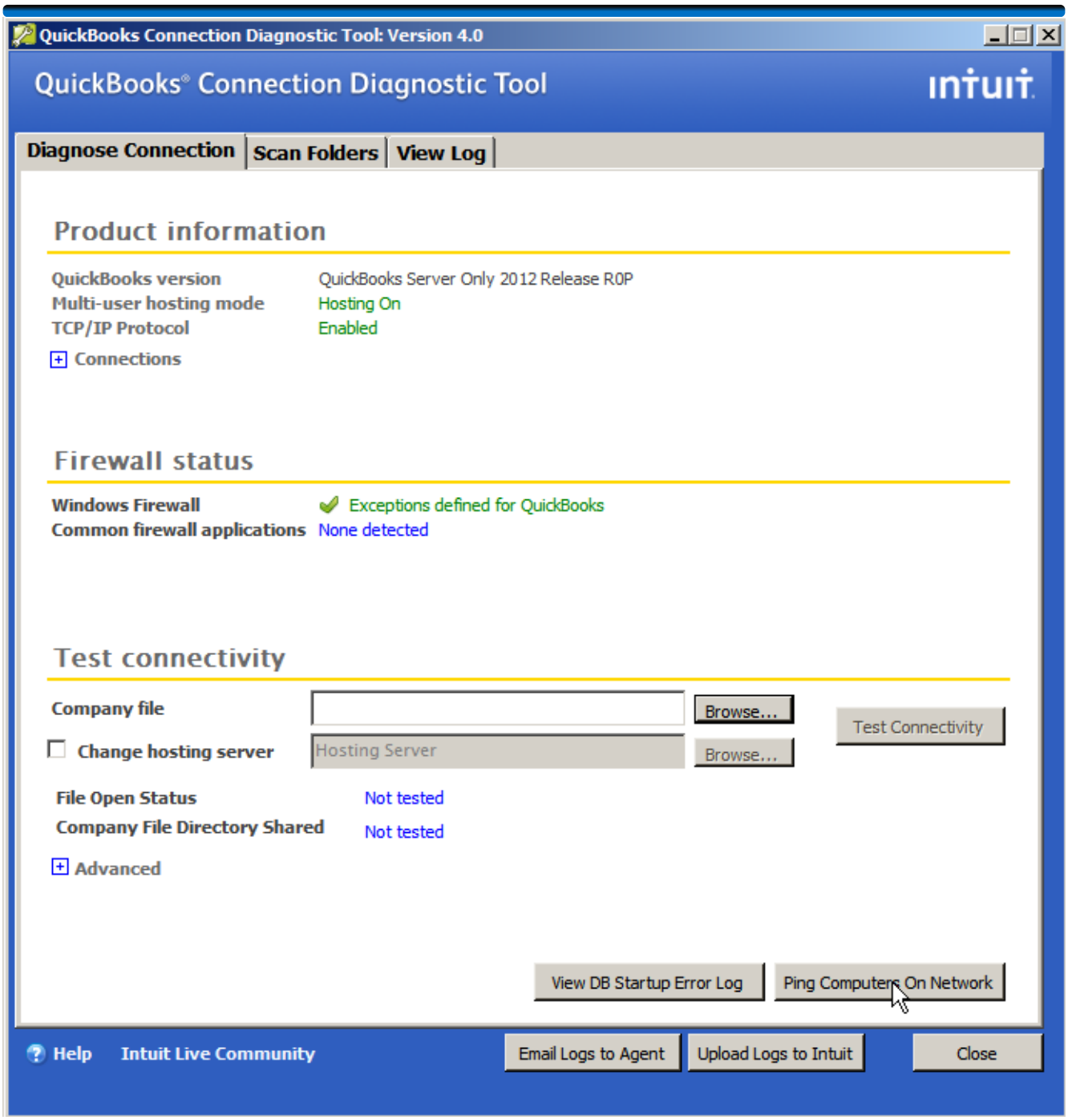

## Configure the Server for Network Access

Before the client workstations will be able to access the company database over the network, TCP ports 8019 and 55348 need to be opened inbound on the Windows Firewall.

These firewall rules can be created manually, or the QuickBooks connection diagnostic tool can be used. The tool can be downloaded from http://support.quickbooks.intuit.com/support/Networking/Nettool.aspx and installed on the VM containing QuickBooks inside the Intel® Hybrid Cloud server. An email ID will be needed to start the download.



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.




The tool will check that the database file is accessible by QuickBooks clients over the network. If there is a problem, click the button next to the problem and it will be fixed automatically.

Note: You may get a message that the firewall rules were not created. Check the firewall rules in server manager and you will probably find that they have been created.

A company file must be created before the "Test Connectivity" button will work. The company file will be created when the first QuickBooks client is installed.

The QuickBooks installation on the Intel® Hybrid Cloud server is now complete.



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.

Now, the QuickBooks client must be installed on user workstations. Once the client is installed, the user can start QuickBooks and create a company file in the shared folder on the Intel Hybrid Cloud server.

## Share Install Files on QuickBooks Server

Share the "C:\QB2012PRO" folder so that users will be able to access it for installing QuickBooks on their workstations.

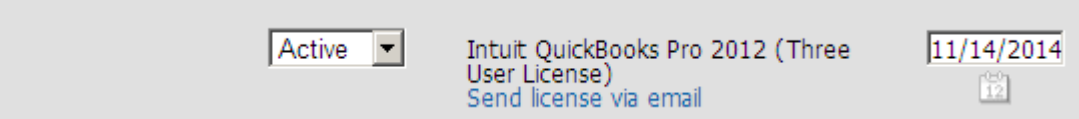
Create and share a folder for the company database. The database will be saved to this folder when the company file is created, after the QuickBooks is installed on the first user workstation.

For information on sharing drives see the following Technet article:
http://technet.microsoft.com/en-us/library/cc770880.aspx

## Acquire License Key

1. A license key is required to install the QuickBooks application on the user workstations.
2. Go to the Intel AppUp® SMB Service store at: https://store.intelhybridcloud.com.

   Log in using your MSP ID and password.
3. Select the Intel Hybrid Cloud server and then select the appliance where QuickBooks Premier is installed. Under that appliance you will see a link like the example shown below:




4. Click the **Send license via email** link to place a license request. The license key will be sent to the email address of the MSP. Save the license key received by email to activate QuickBooks Premier on your client workstations.
5. Each time this link is clicked, a new license key will be emailed, and billing will start for that key.

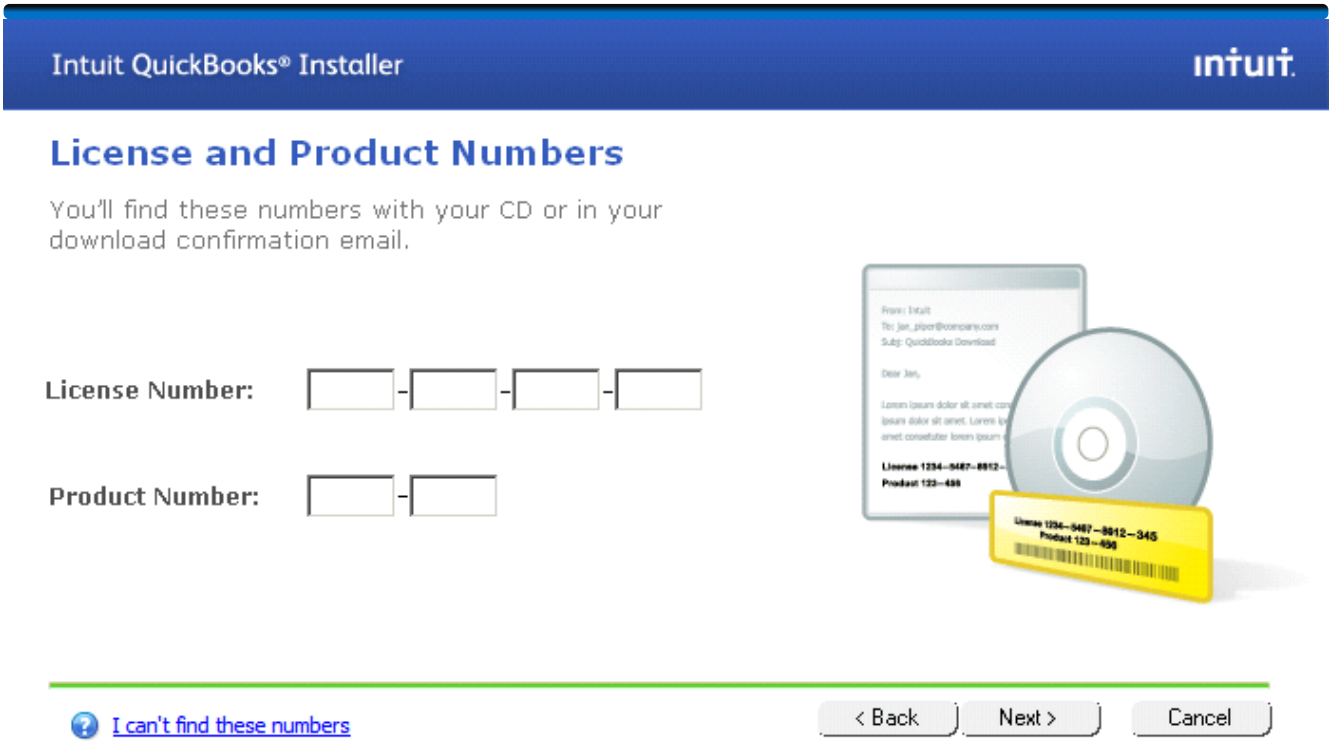
## QuickBooks Premier Installation on Windows Workstation(s)

Installation of QuickBooks on a Windows workstation consists of installing from the same "C:\QB2012PRO" folder that was used to install QuickBooks on the Intel Hybrid Cloud appliance.

1. Map a drive to the shared QB2012PRO folder from the workstation. Also, map a drive to the shared folder where the company file will be stored.
2. Begin installation by double clicking on Setup.exe inside the QB2012PRO folder. However, this time, select the **Express method** on the "Installation Type" screen.
3. In the "License and Product Numbers" section of the installation, use the License Number acquired in the previous section of this guide "Acquire License Key". The Product Number can be found in the Product_Number.txt file in the "C:\QB2012PRO_x_user(s)_product_number" folder. **Be sure to use the product number that matches the license key.**



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.




Note: If additional licenses are required, acquire additional licenses via email from the Intel Hybrid Cloud portal as described in the 'Acquire License Key' section of this manual. **Licenses downloaded from Intuit will not work in this version of QuickBooks.**

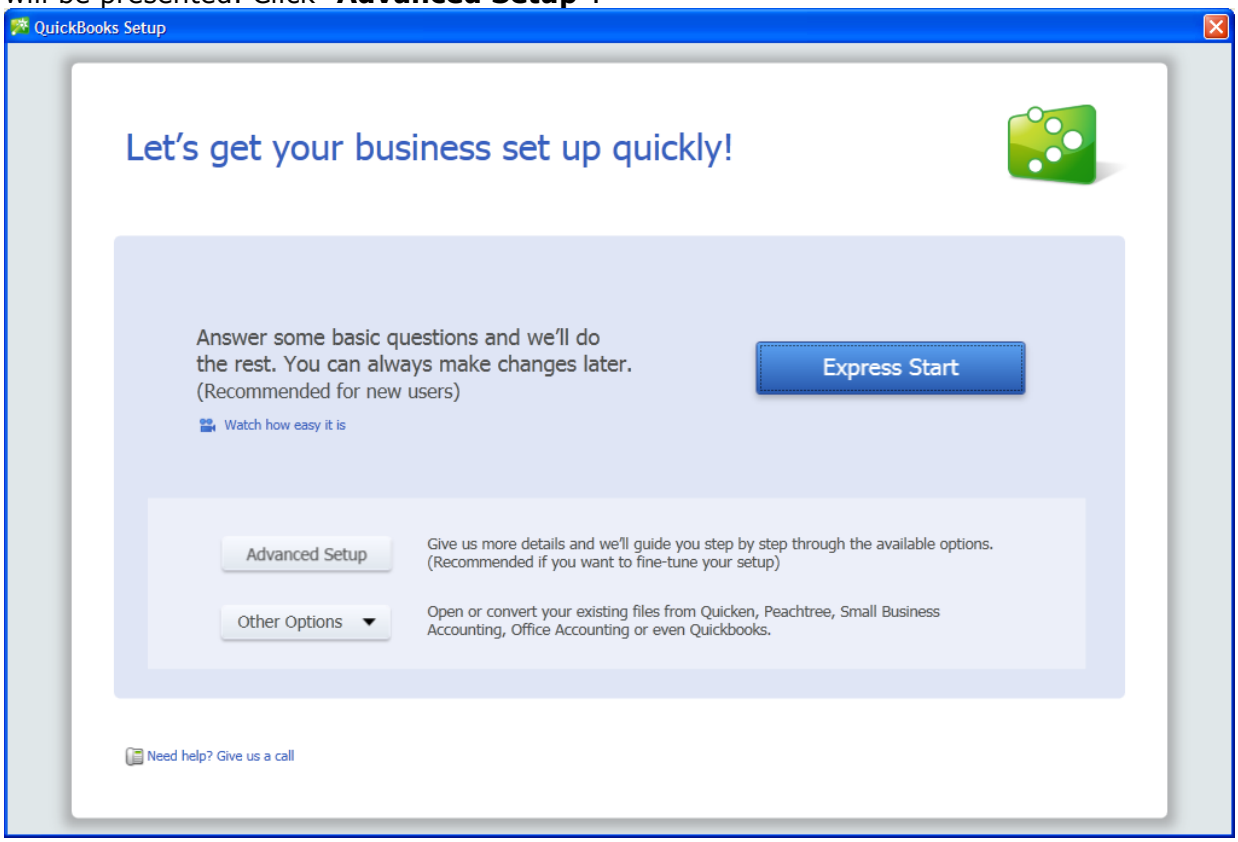
## Creating the Company file in the Shared Location

The company file must be created in the shared folder on the VM where QuickBooks was installed. To do this, follow the steps below.



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.

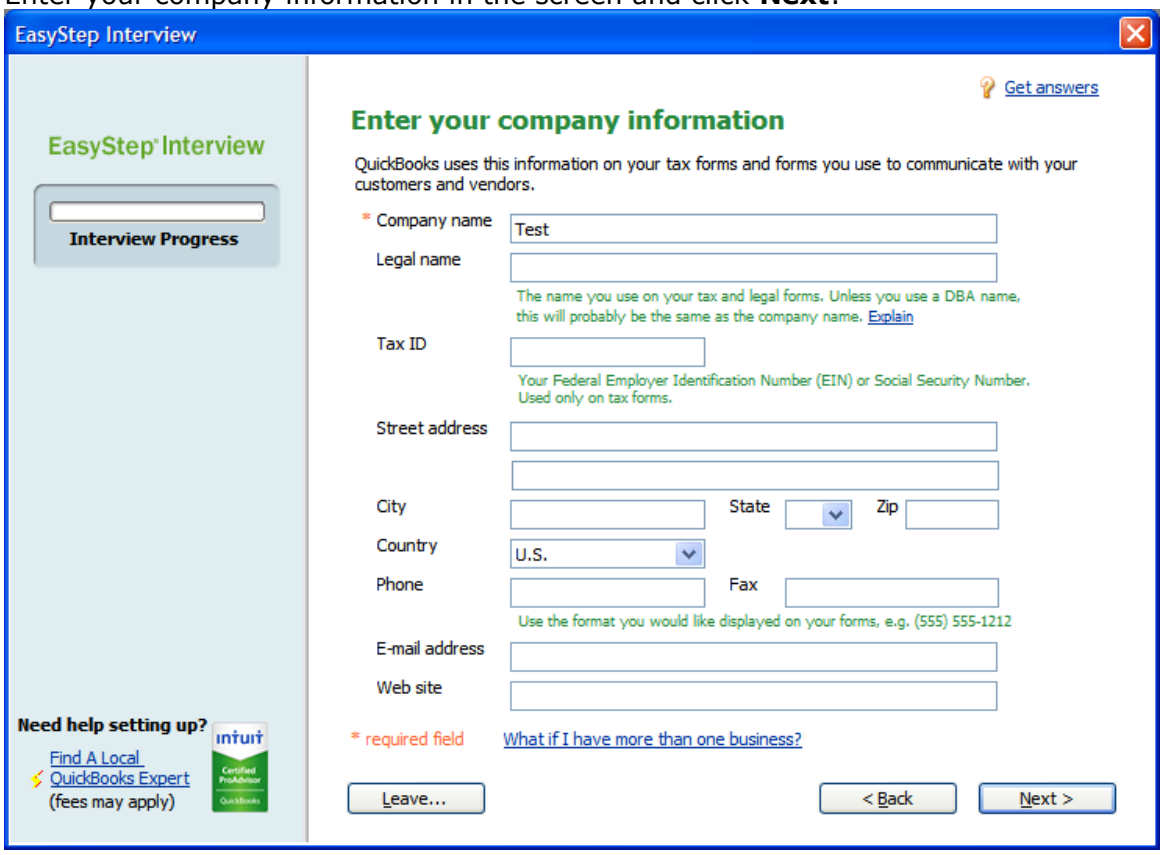
1. After QuickBooks has been installed on the first user workstation, the company setup screen will be presented. Click "**Advanced Setup**":






Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.

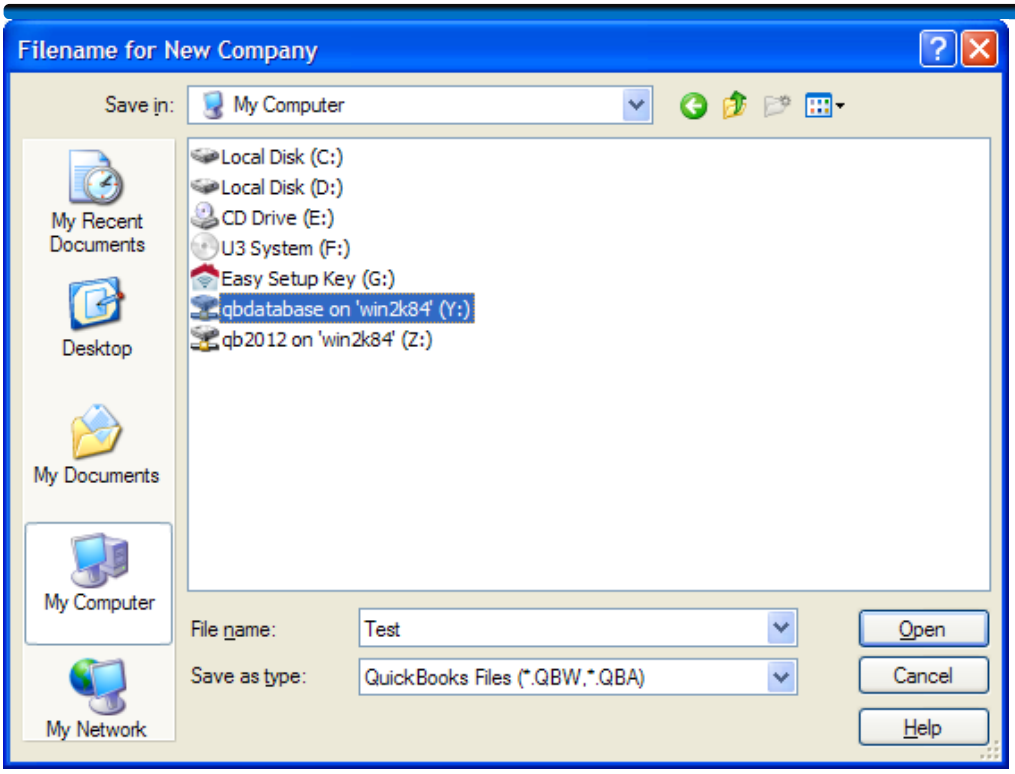
2. Enter your company information in the screen and click **Next**:

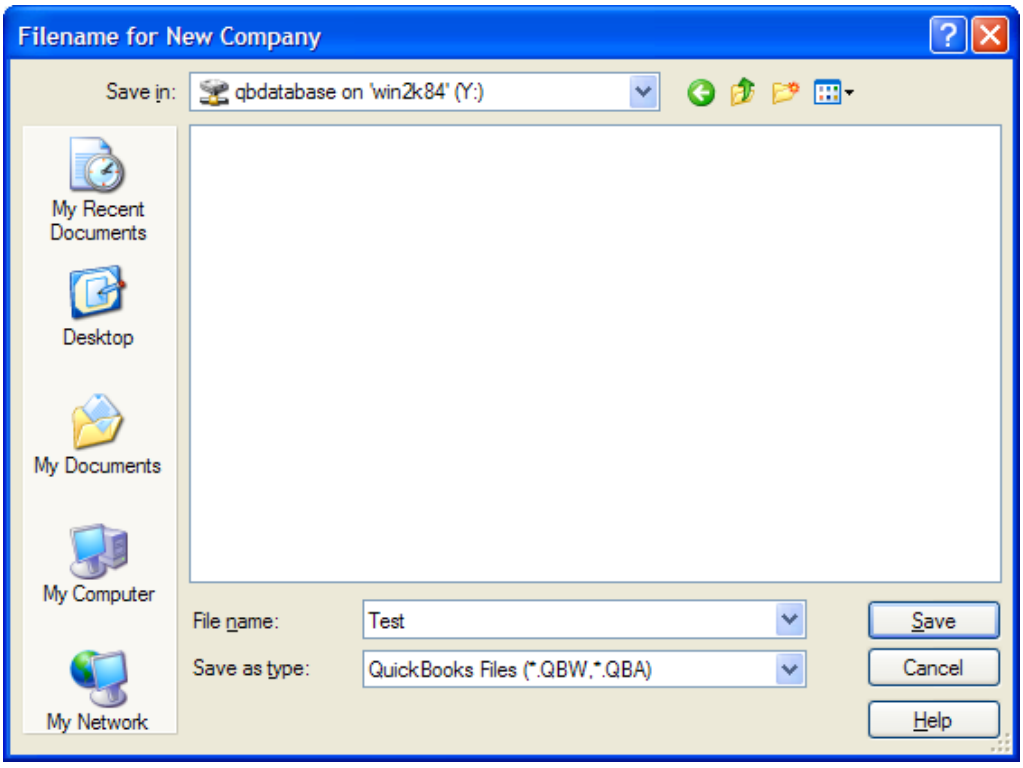



Enter the appropriate information on the rest of the company setup screens. When you get to the "Create Your Company File" screen, you will be presented with a dialog box to choose the location of your company file. Select the shared drive on the VM. The name of the company database will default to the name of your company.



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.

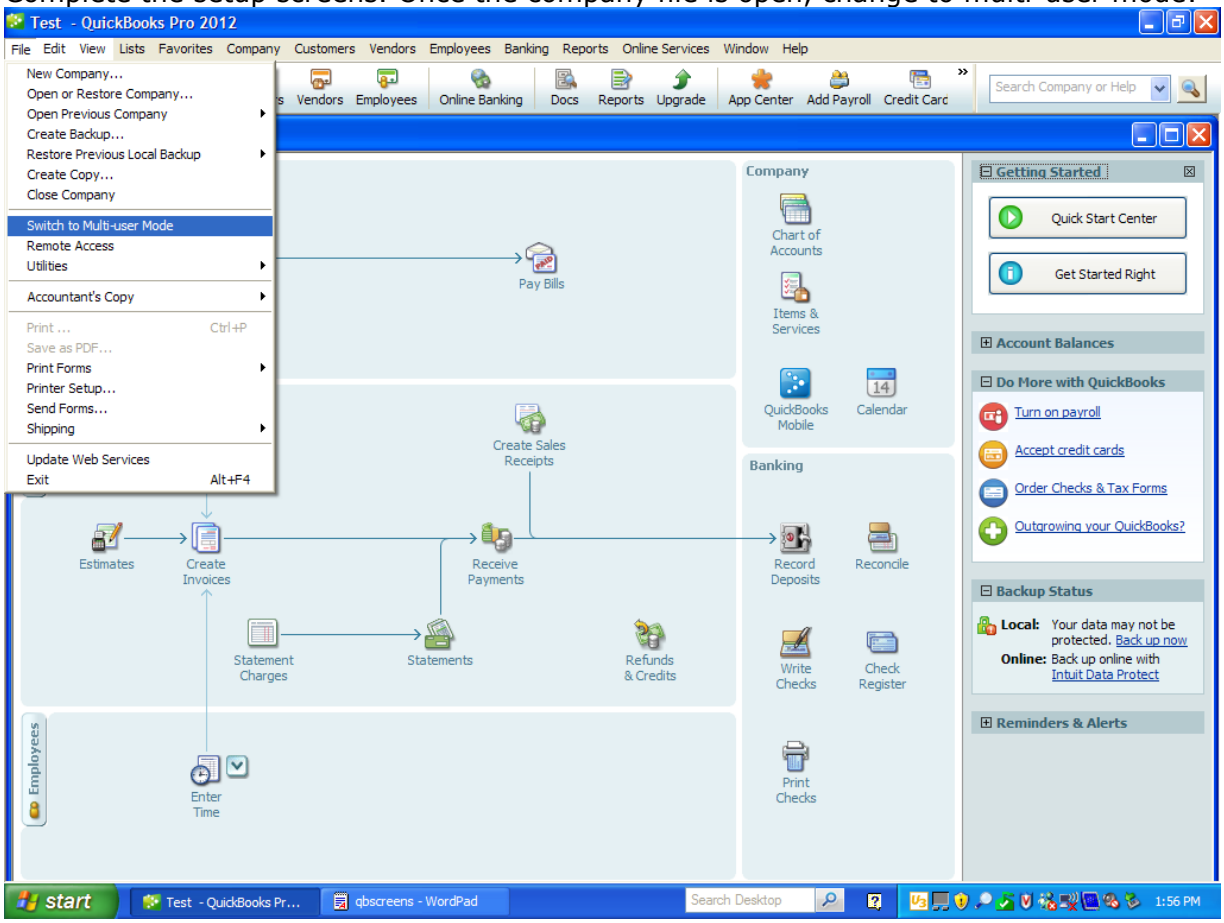





Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.

3. Complete the setup screens. Once the company file is open, change to multi-user mode:




4. Proceed to run the database manager as described in the following section.

## Running the Database Manager

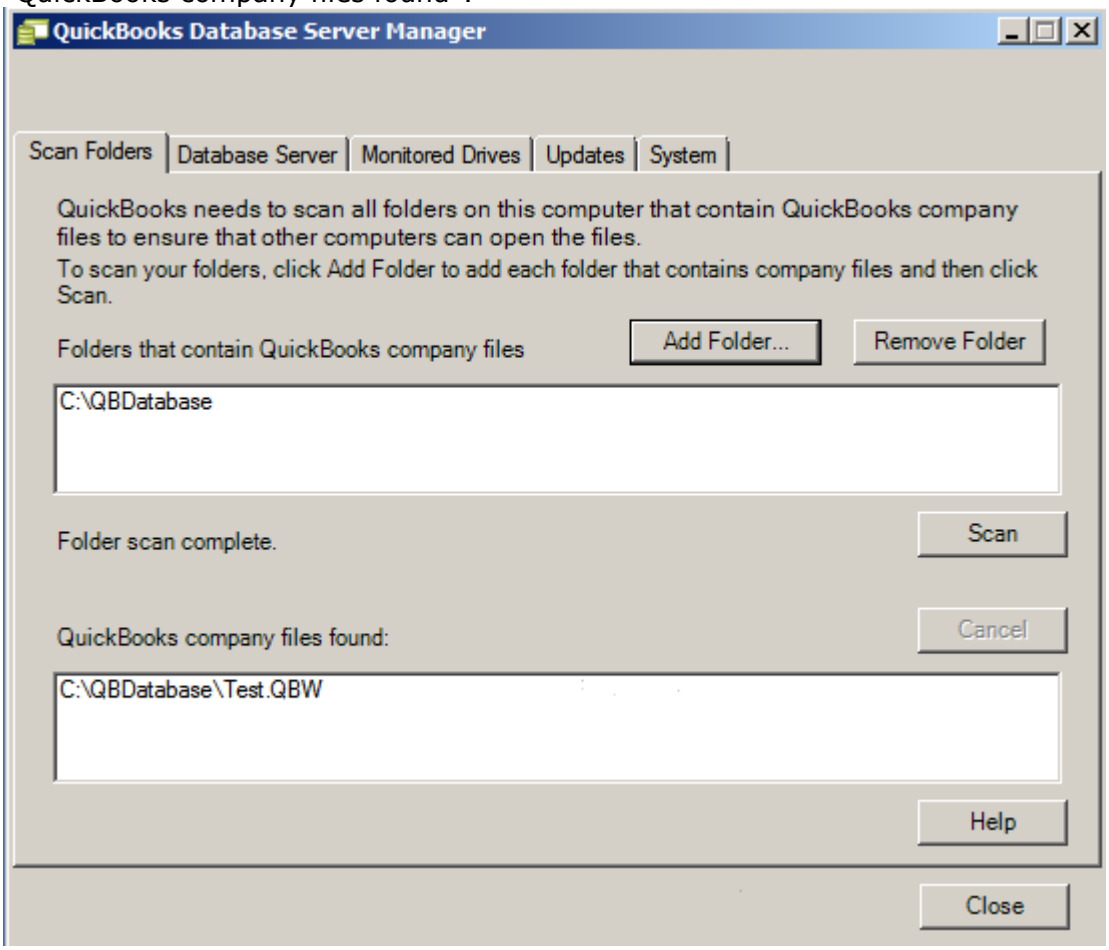
1. On the VM containing the shared database, navigate to Start->All Programs->QuickBooks-> QuickBooks Database Server Manager.

2. When the database server manager opens, the folder containing the shared database will be listed. Click the **Scan** button and the database file you created earlier will appear under



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.

"QuickBooks company files found":



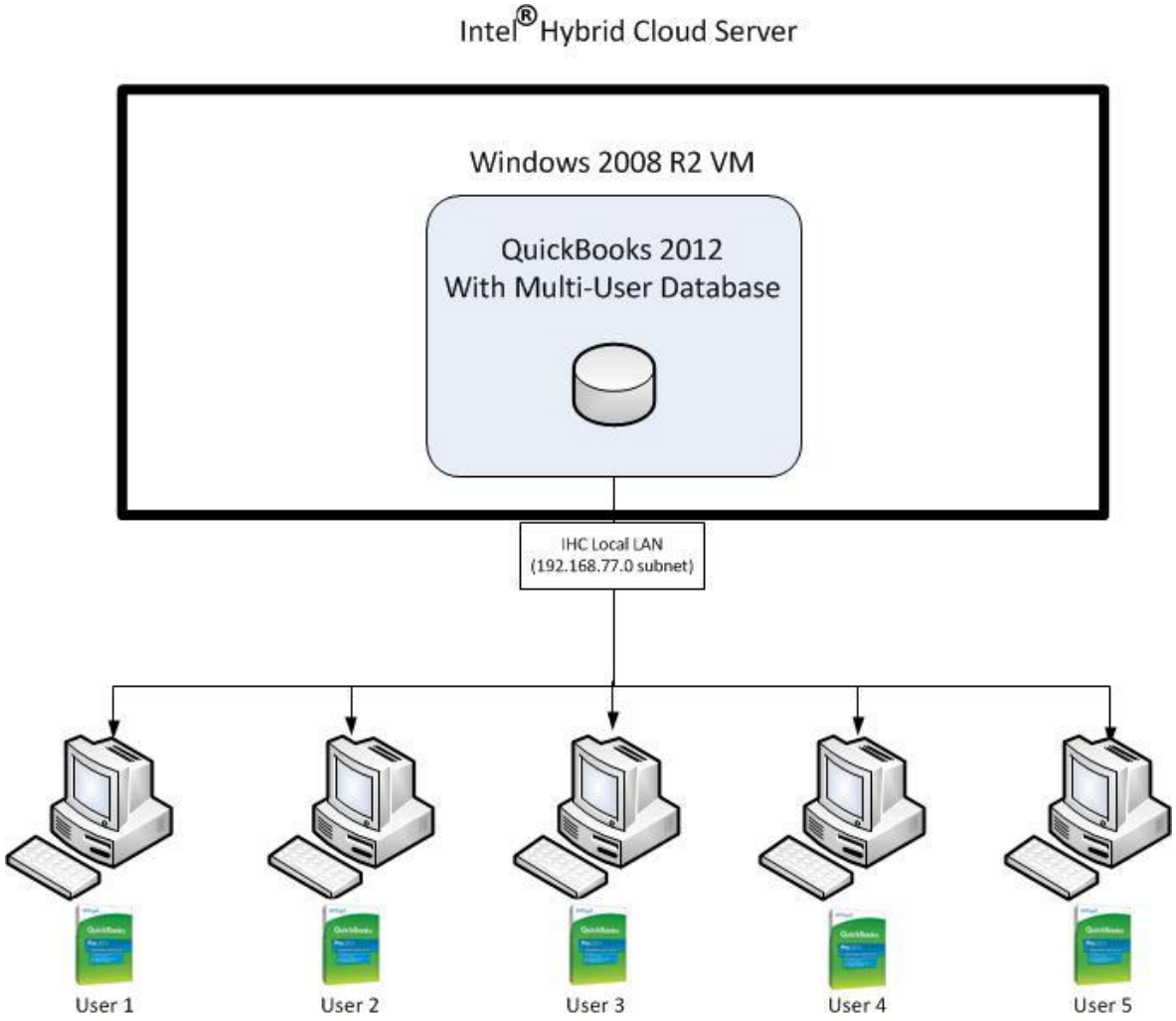

Some things to keep in mind when connecting multiple clients to the company database:

1. A user must be created in QuickBooks for each client that will access the company database. Users are created by clicking on "Company/Set Up Users and Passwords" inside QuickBooks.
2. When creating users, do not check the box that says "Add this user to my QuickBooks license". This check box will take you to a page that will allow you to buy more QuickBooks licenses from Intuit. These licenses will not work in this version of QuickBooks.



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.

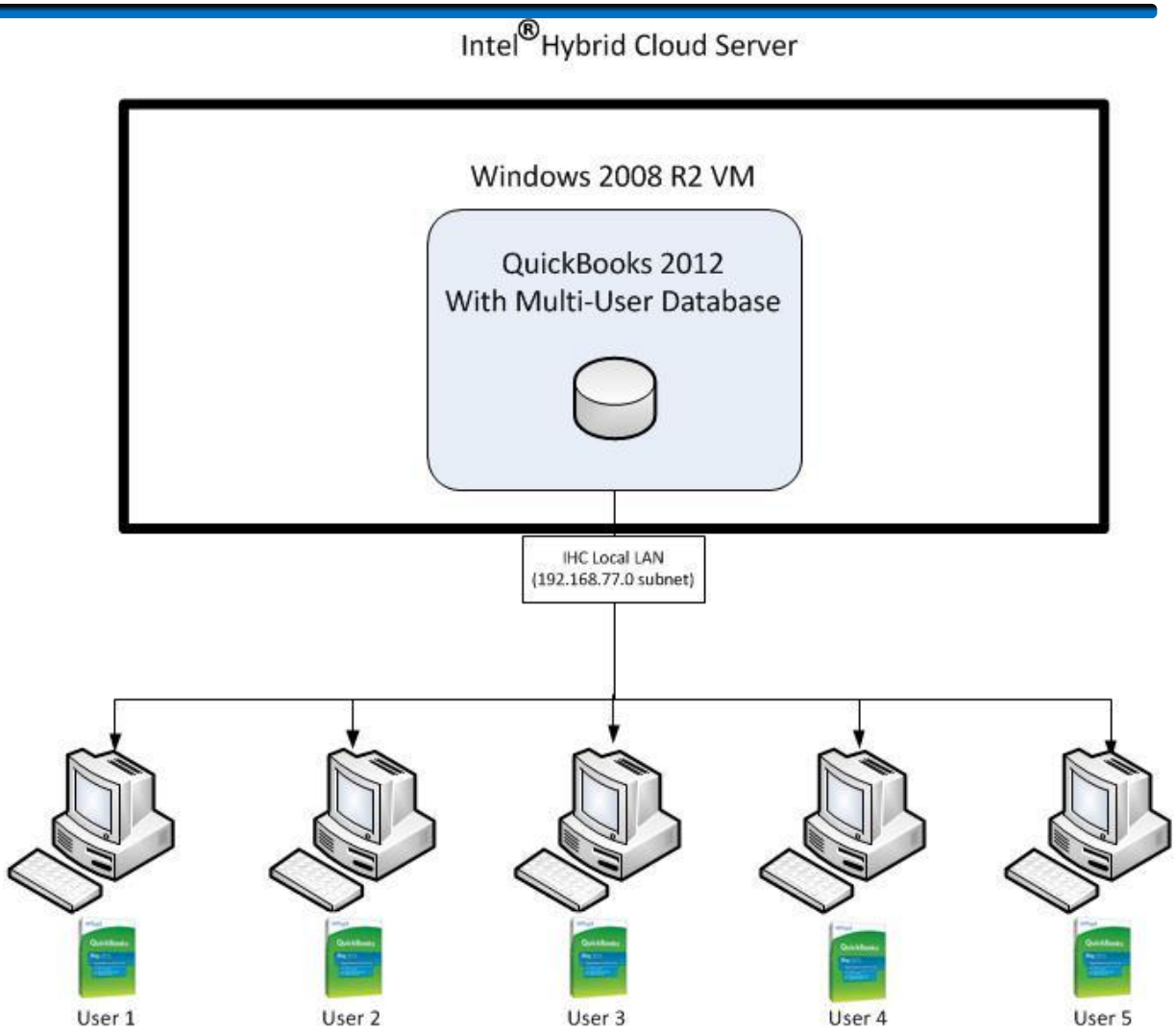
3. A maximum of 5 users can connect to the company database simultaneously. The following diagrams illustrate how the user licensing in QuickBooks works:




All five of these users have the same 3 user QuickBooks license installed
Only 3 of these users can be logged into the database simultaneously



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.




Users one through three have the same 3 user QuickBooks license installed. Users 4 and 5 each have a QuickBooks 1 user license installed. All five of these users can be logged into the database simultaneously



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.

# Uninstall – This is a two-step process.

Step 1

1. Log in to the Intel® Hybrid Cloud server manager.
2. Click the **Appliances** button to open the Appliances page.
3. Select the appliance where the **QuickBooks Premier** application is installed.
4. If the appliance is stopped, click the **Start** button.
5. Select the **Application** tab.
6. Click the **QuickBooks Premier** logo.
7. Click the **Uninstall** button.
8. Logs on the server manager console will confirm successful uninstallation.
9. Now go to step 2.

Step 2

1. Now login into appliance and go to Control Panel-> Programs-> Programs and Features.
2. Select QuickBooks Premier Edition 2012 and then right click to select Uninstall/Change button.
3. Follow screens to completely remove QuickBooks Premier.

# Troubleshooting

The QuickBooks Connection Diagnostic Tool is helpful when diagnosing connectivity issues. Download and install the tool as described in the "Configure the Database for Network Access" section of this manual.

## Technical Support

- For questions pertaining to this guide, contact Intel Customer Support: http://www.intel.com/support/progserv/appupsbs/hybrid/sb/CS-032313.htm
- In the event that you (the Managed Service Provider) are unable to resolve a technical support issue by providing first level support for the Software, you may obtain second level support from the help desk of the Software manufacturer, pursuant to the terms and conditions accompanying the Software. Technical Support contact information is provided at the following location: http://www.intel.com/support/progserv/appupsbs/hybrid/sb/CS-032313.htm#Software

  Intuit Technical Support Contact Information:

  https://support.quickbooks.intuit.com/support/ContactUsPhoneList.aspx

  Caution- Before calling Intuit support team make sure QuickBooks instance running on workstation has been registered on Intuit. Registration can be done by navigating to Help->Register QuickBooks.

  Keep the License Number on hand while calling to Intuit support. The License Number will be used for identification purpose.



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.

- Intel® Hybrid Cloud Platform User Guide
  http://www.intel.com/support/motherboards/server/hybrid/sb/CS-031729.htm
- Appliance and Application Initial Setup Guides
  http://www.intel.com/support/progserv/appupsbs/hybrid/sb/CS-032880.htm



Copyright © 2012 Intel Corporation. All rights reserved. Intel, the Intel logo, and Intel AppUp are trademarks of Intel Corporation in the U.S. and/or other countries. *Other names and brands may be claimed as the property of others.