SET-UP GUIDE

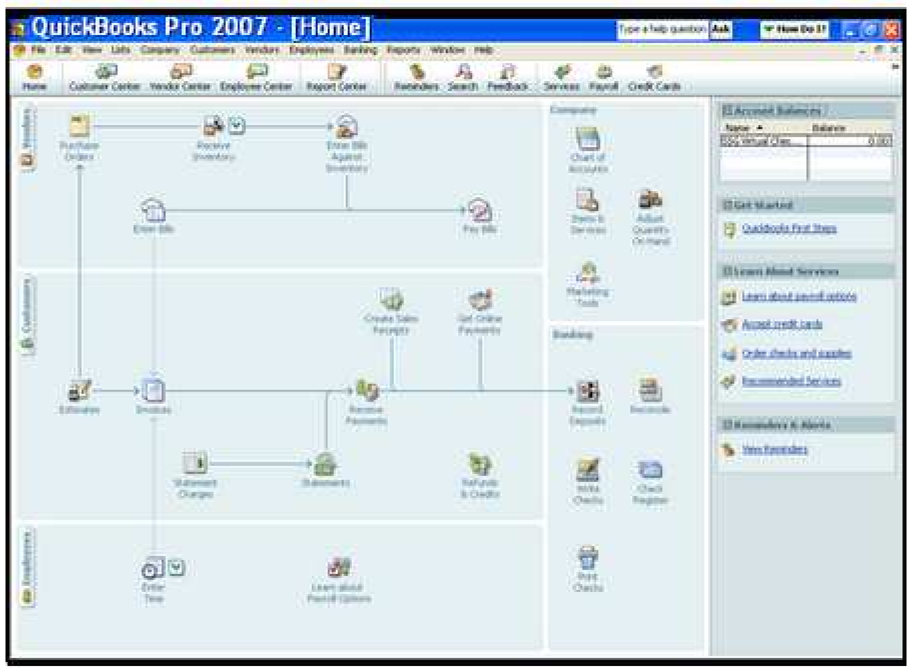
This guide will provide you with set-up instructions for ensuring that **QuickBooks® Pro or Premier 2004 or higher or Enterprise V4 or higher** and **Service Call** are configured properly. If you have difficulty with these additional steps, please contact our Help Desk at **888-412-7226**. Our Help Desk is open Monday through Friday between the hours of 8:30 a.m. and 5:30 p.m. (EST), except Holidays. If these hours are not convenient, please call to arrange a more suitable time.

If you prefer to e-mail your questions, please send them to **techsupport@barcoding.com**. A reply to your inquiry will be made within a 24-hour period.

Now, let’s complete the set-up process . . .

- First, launch your QuickBooks Company file.

  Please Note:
  Service Call can be integrated with **one** QuickBooks file only.

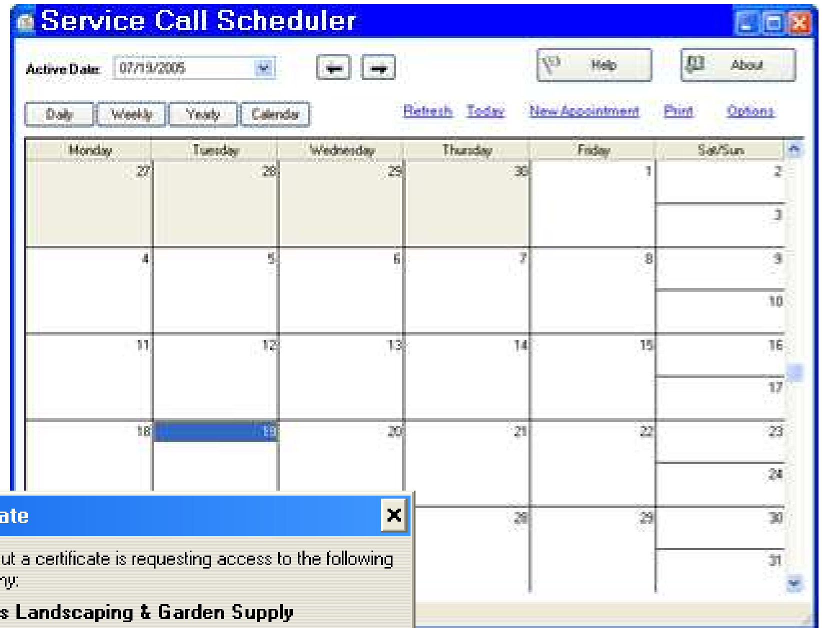


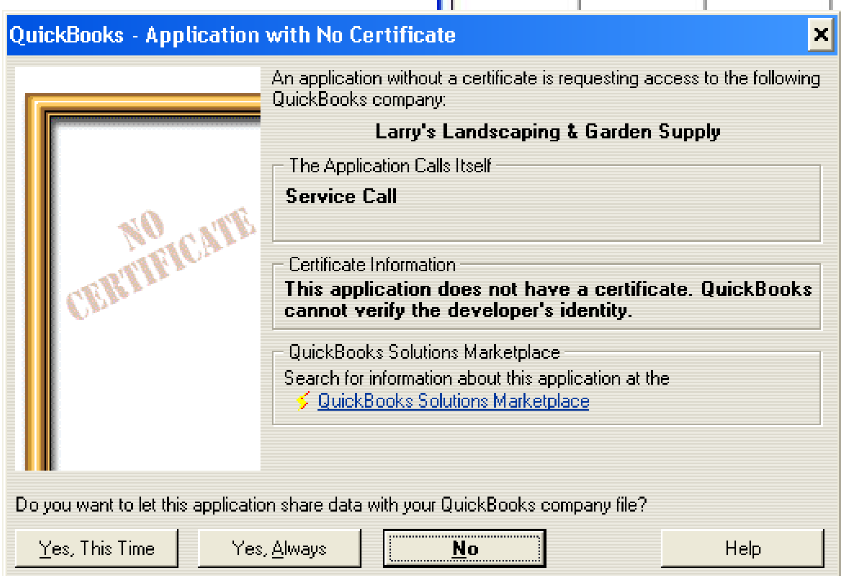
For QuickBooks 2008 Users Only

If you are using a **2008 version** of QuickBooks, you **must** manually add an item to your QuickBooks **Item List**.

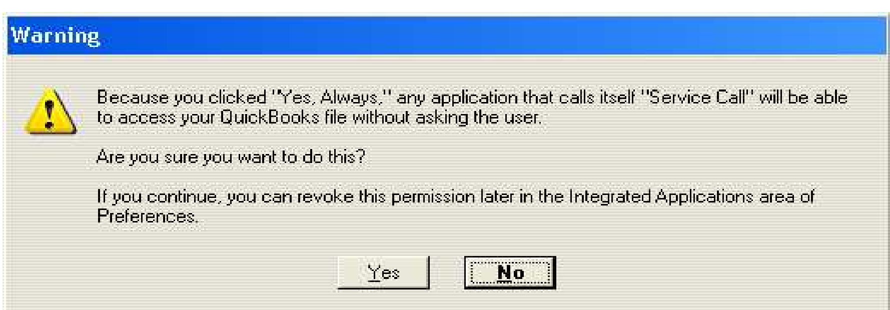
Follow the instructions provided on the **last page** of this document before proceeding.

- Next, double-click on the **Scheduler** icon located on your Desktop.
- Doing so will launch the **Calendar View,** as seen in the screen to the right.
- QuickBooks will now recognize that **Service Call** has requested access to your Company file, as seen in the screen below.
- Click on **"Yes, Always"** to allow data sharing.





- QuickBooks provides the access warning seen below as a precautionary measure.
- Click on **"Yes".**



- **Please Note:** The next step requires you to be in **Single User Mode**. If necessary, click on "File" from the QuickBooks Company Navigator screen and select "Switch to Single-user Mode".

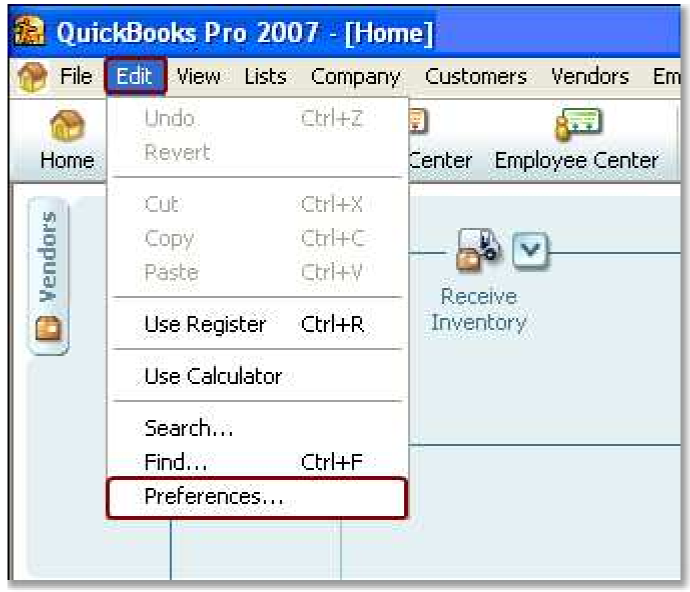
- Once you are in Single User Mode, click on **"Edit"** found at the top of the screen to the right of the "File" option.

- Select **"Preferences"** from the drop-down list.

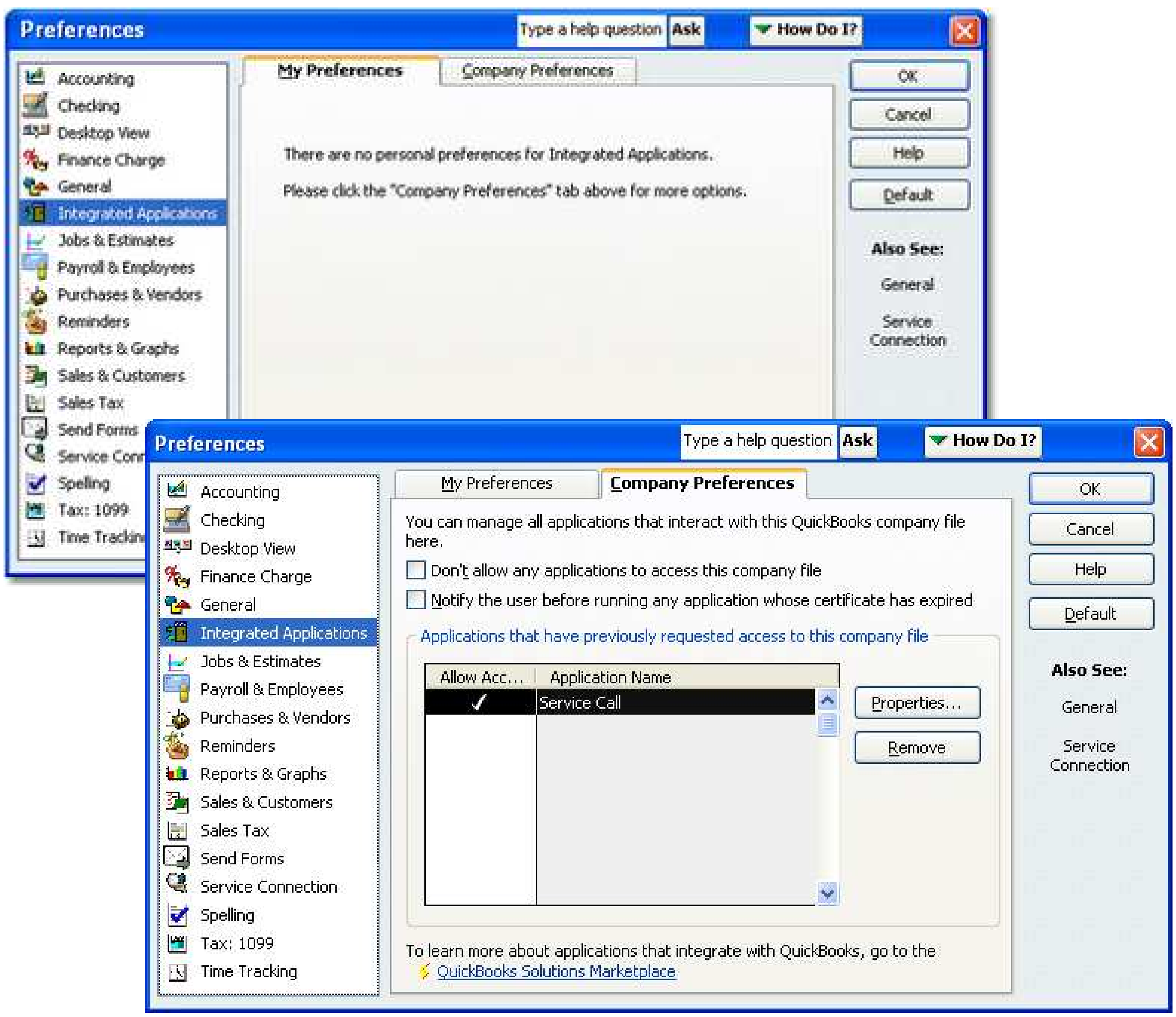
- The **"My Preferences"** screen, seen below, will appear. Scroll down to and select the **"Integrated Applications"** option in the area found to the far left of the screen.

- Select the second tab for "**Company Preferences**", which will bring you to the second screen found below.

- As you can see, **Service Call** has now been identified as an application that has access to your Company file.



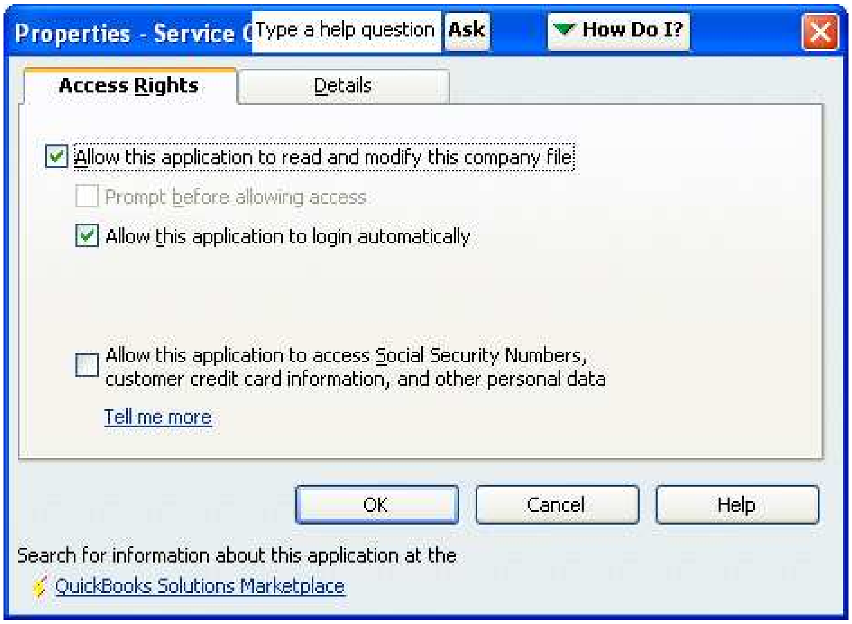
- Click on the **"Properties"** button found to the right of the **Application Name** field.



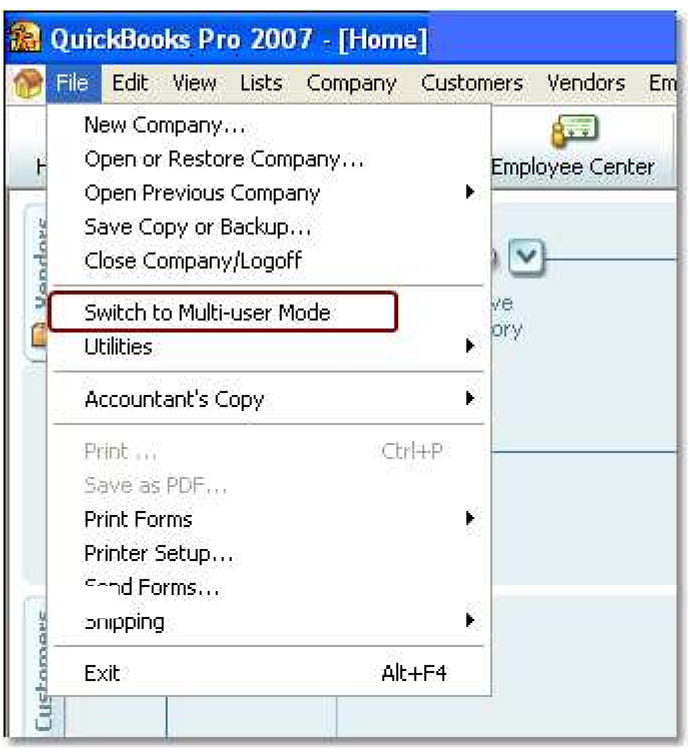
- At the **"Access Rights"** tab found on the **"Service Call Properties"** screen, as seen below, you will find a checkmark in the first box.

- You will also want to allow **Service Call** to login automatically. To do so, click in the **third** box to add this feature. This will enable you to use Scheduler **without** running QuickBooks. Next, click on **"OK"**.

- You will be returned to the previous **"Preferences"** screen. Click on **"OK"** to implement your selections.



- **Please Note:** Before proceeding, **close** the **Scheduler** application.



- Upon returning to the QuickBooks Company Home Page, as seen in the screen to the left, click on **"File"** found in the upper left corner.

- From the dropdown list, select **"Switch to Multi-user Mode"**.

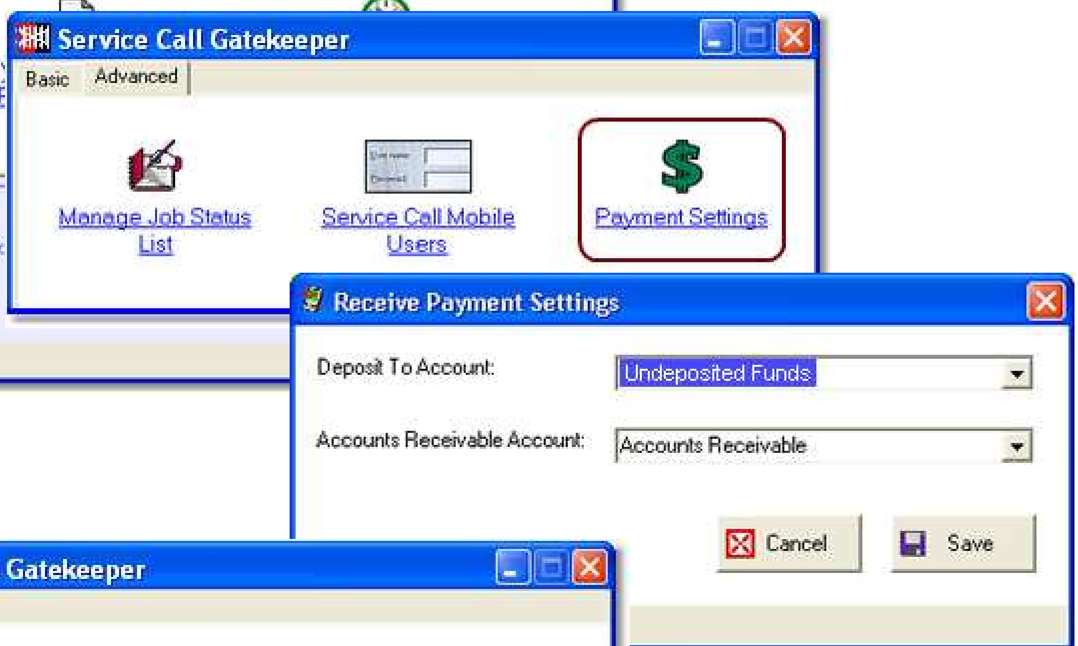
- Your QuickBooks set-up is complete.

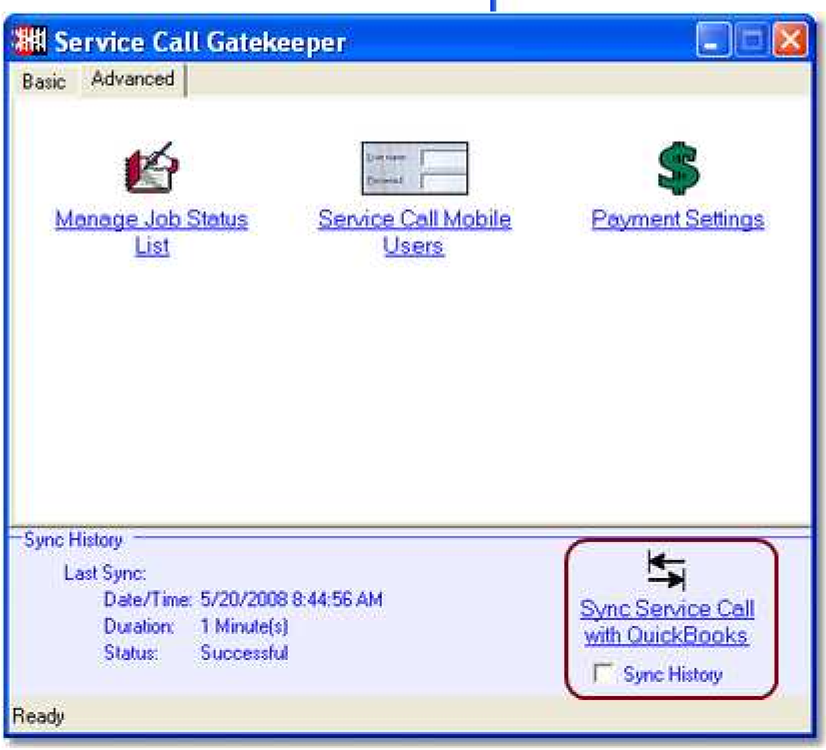
Now that QuickBooks has been integrated with **Service Call**, you will need set up your **Payment Settings** and perform a **Synchronization** with your Company File. Instructions for these actions can be found on the page that follows.

- Begin by clicking on the **Gatekeeper icon** located on your Desktop.

- From the **Service Call Gatekeeper** screen, click on the **Advanced Tab**.

- Proceed by selecting the **Payment Settings** option, as seen below.
- At the **Receive Payment Settings** screen that follows, select **Undeposited Funds** to deposit to and an **Accounts Receivable** account. Click on **"Save"**.



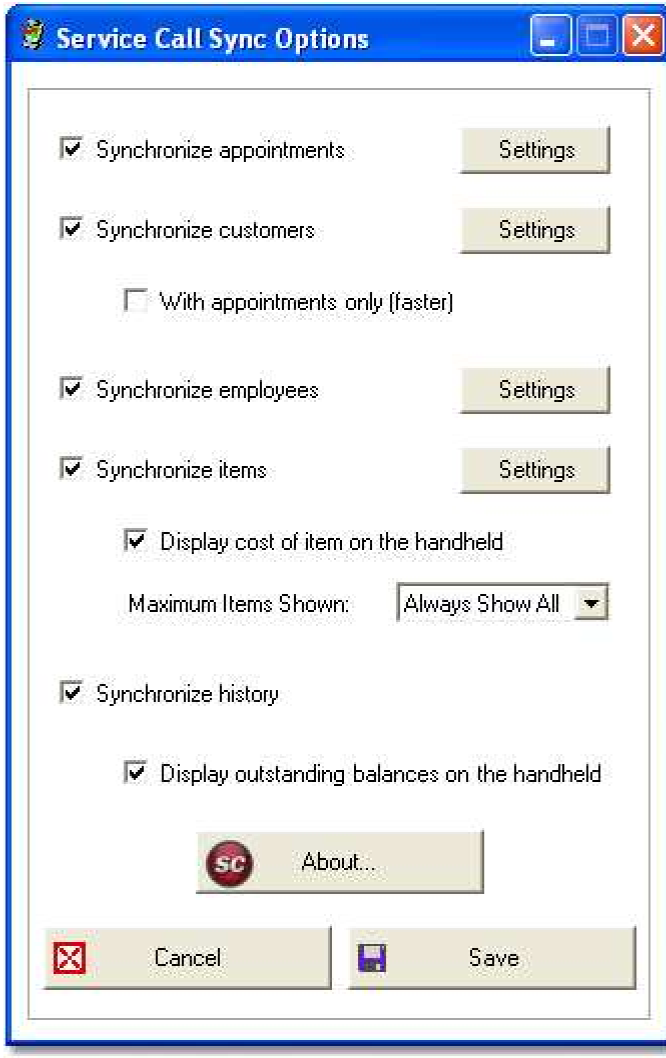


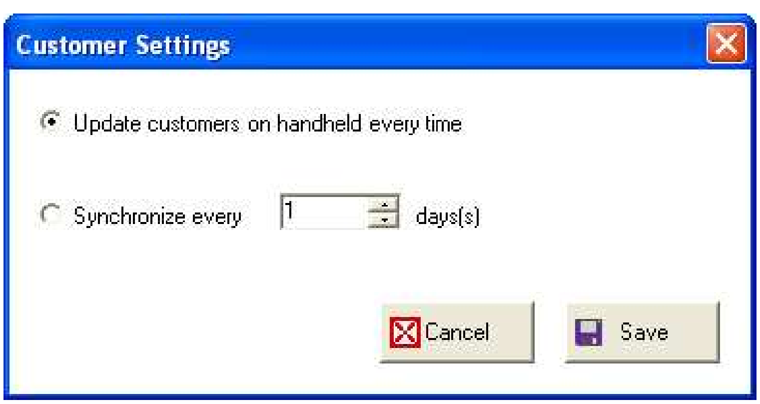
- You will be returned to the previous screen, where you will click on **Sync Service Call with QuickBooks**, found in the lower right corner. You may elect to **Sync History** by clicking in the box to the immediate left of this option.
- Gatekeeper will display the **Date/Time** of your last sync along with the **Status**.
- All future synchronizations with QuickBooks can be completed from within Gatekeeper **or** you may elect to set up a Windows **Scheduled Task** to automatically synchronize once a day.

Please Note: Before launching **Service Call** on your **Windows Mobile Device**, you will need to configure your **synchronization settings**, as instructed below.

Synchronization Settings

- From the **"Start"** button found in the lower left corner of your **PC**, locate the **Service Call Anywhere** folder.
- Within this folder, you will find a **Service Call Tools** folder, which contains the **Service Call Configurator** file. Double-click on this file to launch the **Service Call Sync Options** screen seen to the right.
- The **Sync Options** screen enables you to change the settings for synchronizing appointments, customers, employees, items, and history.
- Simply click on the **"Settings"** button found to the right of each category to modify the frequency.
- A screen similar to the one seen below will appear for each category. Change your settings as needed and click on **"Save"** or click on "Cancel" to leave the settings as they are.
- Complete this process for each category.
- When all categories have been configured, click on "**Save**" at the **Service Call Sync Options** screen to finalize all settings.





FOR QUICKBOOKS 2008 USERS ONLY

- From the QuickBooks Menu, seen here, select **Lists**.
- Next, choose **Item List**.
- Scroll to the bottom of the Items List screen.
- Tap on **Item** in the lower left corner of the screen and then select **New** from the list of options, as seen in the screen to the left.
- Create the item as follows:
    - Select **Service** as the **Type**.
    - Enter **[Notes]** in the Item Name field.
    - Enter the **Description** exactly as it appears in the screen seen below.
    - Enter zero (0) for the **Rate**.
    - Select **Non** for the **Tax Code**.
    - Select the Account into which your funds are deposited.
    - Tap on **OK**.