

DESKTOP TOOLKIT INSTALLATION GUIDE

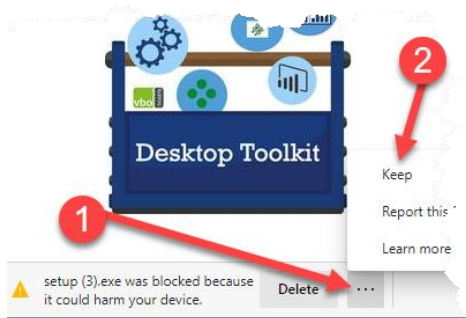
QuickStart Guide



Installing Desktop Toolkit

Desktop Toolkit must be installed and registered with QuickBooks on every computer it will be used on. The installation program will install and register Desktop Toolkit.

1. Ensure that QuickBooks is open
2. Using your web browser (Internet Explorer) navigate to the Better Idea Group Desktop Toolkit website <https://www.betterideagroup.com/desktop-toolkit.html>. Click on the link noted to download the Desktop Toolkit installation program. Make sure you make note where you save the file, you will need to run this file in the next step.



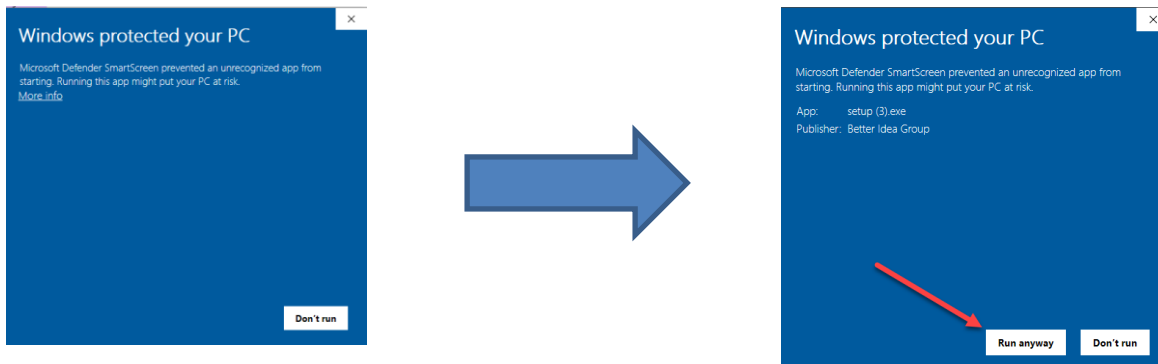
3. A security box may come up in the browser window asking you to block the download. First click the 3 dots and then press the “Keep” option

4. Launch the Desktop Toolkit installation program that was saved in the previous step.

Note: You should use the Administrator account only when installing software or changing computer settings. When you are browsing the Web, reading e-mail, or performing other day-to-day computer tasks, you should be logged on using a limited account.

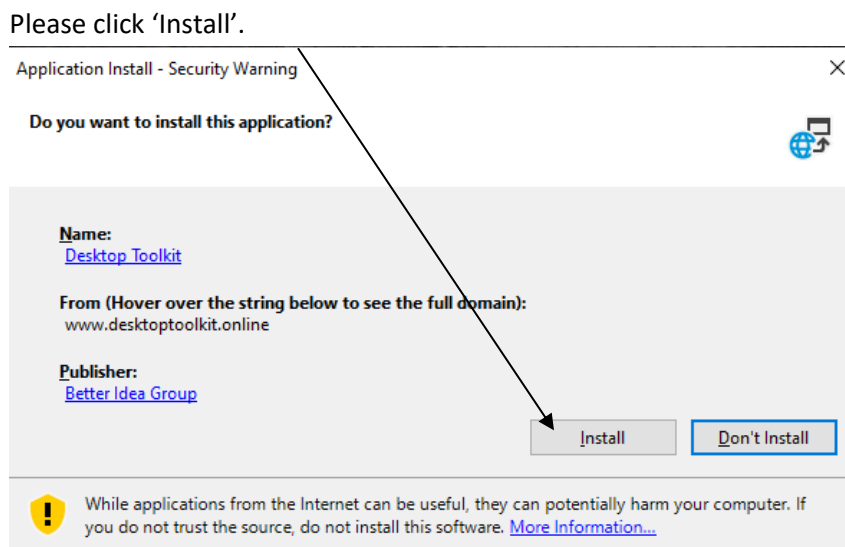
DESKTOP TOOLKIT INSTALLATION GUIDE

You may receive a Security Warning that you are attempting to run unrecognized software. You need to click the “more info” option first to get the “run Anyway” button to show up. Once you see that button, select it to continue



5. Desktop Toolkit checks your system to make sure you have all the necessary software installed in order for Desktop Toolkit to install. If your system does not have the necessary software, the installation will download and install the software for you.

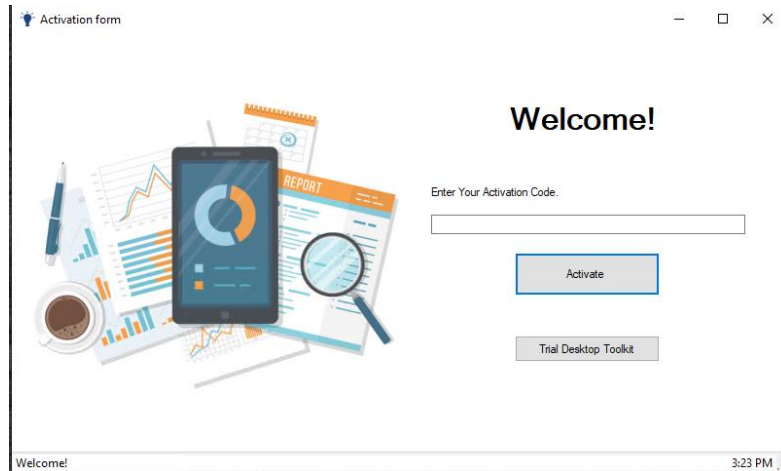
5.1. Once needed components are installed, the Desktop toolkit itself will install. A feature of the product is that we publish updates to the internet so once your basic installation is complete, you will be prompted to install updates as they become available.



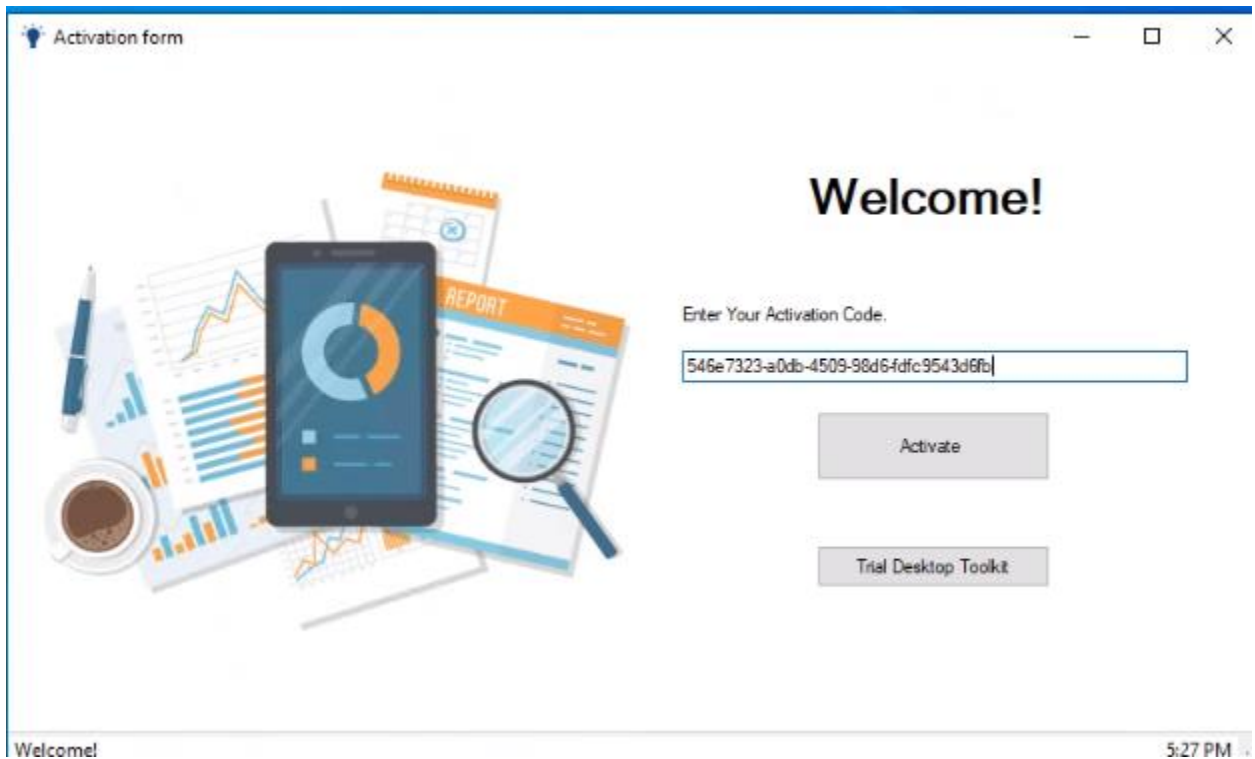
Note: You should use the Administrator account only when installing software or changing computer settings. When you are browsing the Web, reading e-mail, or performing other day-to-day computer tasks, you should be logged on using a limited account.

DESKTOP TOOLKIT INSTALLATION GUIDE

6. As soon as the program is installed, an activation screen will appear:



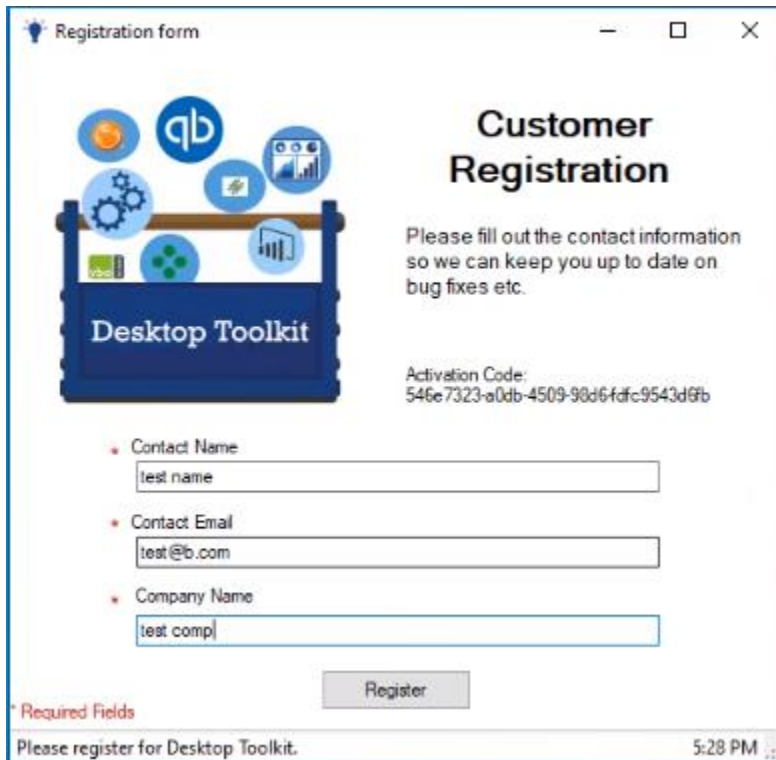
If you are just testing the toolkit go ahead and select that option. ALL of our integrations will allow you to start them with a sample data file but since we have highly customized solutions, some of the integrations you start may require other software you might not have. The description of each module should tell you any unique requirements . If you already have your activation code go ahead and paste that in and press activate



Note: You should use the Administrator account only when installing software or changing computer settings. When you are browsing the Web, reading e-mail, or performing other day-to-day computer tasks, you should be logged on using a limited account.

DESKTOP TOOLKIT INSTALLATION GUIDE

We ask all customers to complete the Customer Registration screen comes up . Please take the time to register with us so we can let you know of any important issues.



The screenshot shows a window titled "Registration form" with standard Windows window controls. On the left, there is a graphic for "Desktop Toolkit" featuring a blue toolbox with various icons (gears, a lightbulb, a bar chart, a pie chart, and a document) and the text "Desktop Toolkit" on a blue base. To the right of the graphic, the text reads "Customer Registration" in a large, bold font, followed by "Please fill out the contact information so we can keep you up to date on bug fixes etc." Below this, an "Activation Code" is displayed: "546e7323-a0db-4509-98d6-fafc9543d6fb".

Below the activation code, there are three required fields, each with a red asterisk icon:

- Contact Name:
- Contact Email:
- Company Name:

A "Register" button is located below the fields. At the bottom left, a red asterisk icon is followed by the text "Required Fields". At the bottom right, the text "Please register for Desktop Toolkit." is displayed, and the system clock shows "5:28 PM".

Note: You should use the Administrator account only when installing software or changing computer settings. When you are browsing the Web, reading e-mail, or performing other day-to-day computer tasks, you should be logged on using a limited account.

DESKTOP TOOLKIT INSTALLATION GUIDE

Obtaining permission to interact with a Quickbooks file

Once you have registered, we have to complete the same process required of every QuickBooks Add-on. i.e. asking QuickBooks for permission to talk to the open file (note: this process must be completed for any QB file). window will appear asking you to give Desktop Toolkit permission to access your company file. Grant access by choosing : ‘Yes, whenever this QuickBooks company file is open’ and then click ‘Continue’. You will typically get a few additional confirmations dialogs as well

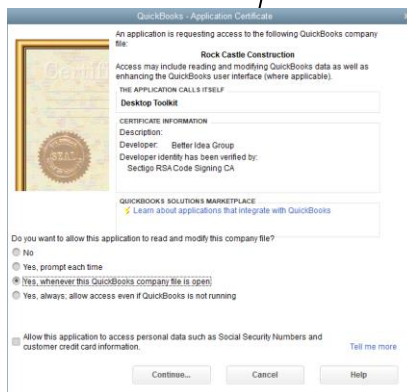


Figure 2 QuickBooks add-in authorization dialog

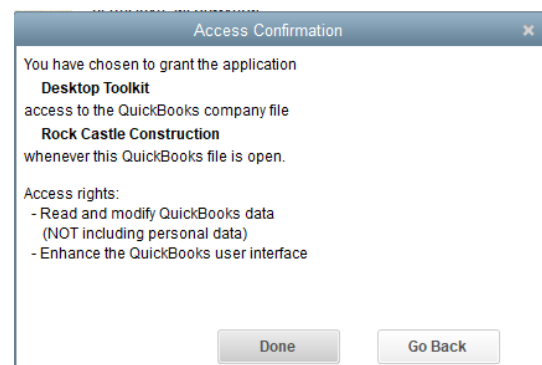


Figure 1 Confirmation dialog

- At this point the installation is now complete and the Desktop Toolkit program should be on the screen. You may now refer to your user guide on how to use Desktop Toolkit.

Note: You should use the Administrator account only when installing software or changing computer settings. When you are browsing the Web, reading e-mail, or performing other day-to-day computer tasks, you should be logged on using a limited account.