Point of Sale

Remote Data Sharing

with QuickBooks Financial Software

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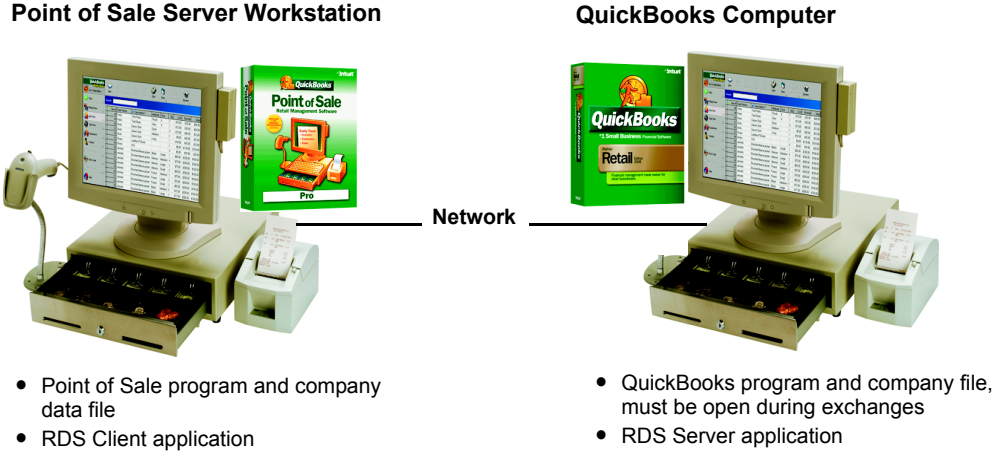
Overview

Remote Data Sharing (RDS) is an alternative way to configure Point of Sale and QuickBooks Financial Software to exchange data across a local area network (LAN). With RDS, your QuickBooks Financial Software can be located on any computer on your network, other than the Point of Sale Server Workstation.

RDS allows you to share financial data over the network by installing Server and Client applications on the two computers (these are different than the server/client applications used for Point of Sale workstation to communicate over the network).

The two programs communicate through the server/client applications.



Remote Data Sharing - QuickBooks on Different Networked Computer

IMPORTANT: RDS Server/Client Relationship

For the purposes of remote data sharing, the computer on which you have QuickBooks Financial Software installed is referred to as the “server.” The Point of Sale Server Workstation is the “client.”

Comparison of the two methods of Financial Exchange with QuickBooks on another networked computer

	Remote Data Sharing
Benefits • Simpler setup and operation if you allow employees to do exchanges with QuickBooks	**Benefits** • Do not have to install QuickBooks on the Server Workstation • RDS logins and passwords and other security options can provide more protection for financial data
Limitations • Both programs must be installed on the Server Workstation • If open, QuickBooks *must* be in multi-user mode • Data exchange blocked if single-user license, and another user is in QuickBooks	**Limitations** • Setup and operation is more complex • RDS server application *must* be running on the QuickBooks computer (server) during exchanges

Getting the RDS Applications

The latest versions of the RDS applications are available to download at:

http://support.quickbooks.intuit.com/archive/pos/downloads

Download the applications to your desktop or any folder on your computer. The download consists of two application files:

RDS Server Application: RDSnServerInstaller.exe

RDS Client Application: RDSnClientInstaller.exe

(n=version of RDS, subject to change)

You can also download the latest version of this documentation from the same site.

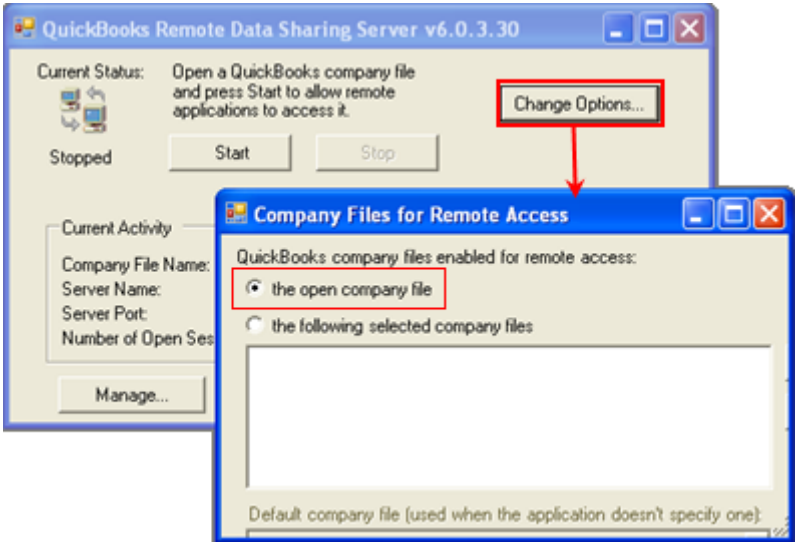
Installing the RDS Applications

Installing on the computer with QuickBooks Financial Software (RDS Server)

The Remote Data Sharing Server application is installed and run on the network computer with your QuickBooks Financial Software.

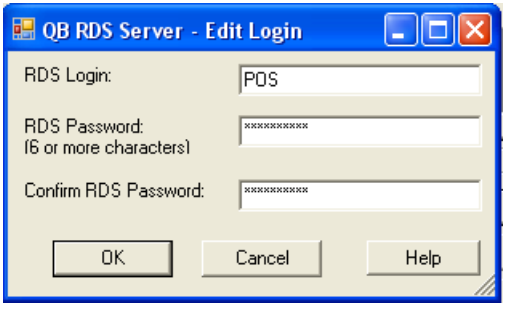
To install the Remote Data Sharing Server:

1. Using Windows Explorer, navigate to the location where you downloaded the RDS application files.
2. Double-click the **RDSnServerInstaller.exe** file.
3. Follow the on-screen instructions to install the server application.
4. Launch your QuickBooks financial software and open the company file you will use with Point of Sale.
5. From the Windows Start menu, select **All Programs > QuickBooks > Remote Data Sharing Server**. The RDS Server dialog is opened.
6. Select **Change Options** and ensure the option titled **the open company file** is selected and then choose **OK**.



7. Select **Manage** to open the RDS Server Manager.
8. Select **New Login** and enter a login name and password.

   This is the login name and password you will use when connecting across the network from Point of Sale to QuickBooks on the server.
9. Select **OK** to close the Login dialog and then **Close** to exit the Server Manager.
10. Select **Start**.



11. The QuickBooks Application Certificate window is displayed. Use his window to tell your QuickBooks financial software how you want to let the RDS Server access your company file.

> **Login Choices**
>
> QuickBooks offers several choices for how the login to your financial software via the RDS server can be made, from being prompted every time to automatic login even when your financial software isn't running. Your choice s should be based on your security requirements. Consult the help available from the setup dialogs for assistance in what these choices mean. This documentation assumes a medium level of security, which allows RDS Server access anytime your company file is open.

12. Select **Yes, whenever this company file is open** and then **Continue**. On the confirmation dialog, select **Done**.

The RDS Server application starts and the Current Status in the upper-left corner changes to **Running**. You can minimize the Server application, but leave both it and your QuickBooks financial software open while you install the client computer.

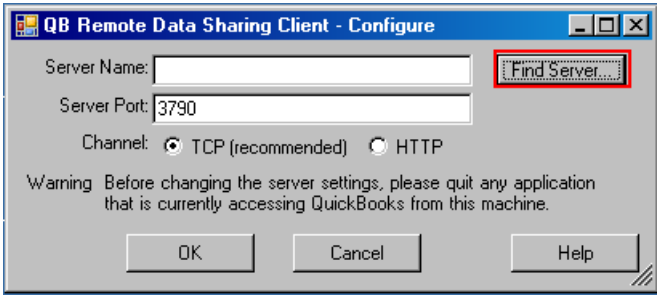
When minimized, the QB Remote Data Sharing icon is displayed in the Windows taskbar.

Installing on the computer with Point of Sale (RDS Client)

The Remote Data Sharing Client application is installed and run on the Point of Sale Server Workstation.

To install the RDS on the client computer:

1. If running, close Point of Sale.
2. Browse to the downloaded **RDSnClientInstaller.exe** file and double-click it.
3. Follow the on-screen prompts to complete the installation.
4. From the Windows Start menu, select **All Programs > QuickBooks > Configure Remote Data Sharing Client**.



5. Enter the **Server Name** (to find, on the RDS Server computer use Control Panel to select System and then look for the computer name) or select **Find Server** to attempt to locate the server on the network. Select **OK** after the Server Name is entered.

   If using the Find Server option and the RDS Server isn't found, check to make sure the RDS Server application is running on the QuickBooks computer.
6. Close the RDS Client dialog.
7. Start Point of Sale.
8. In the Setup Interview or on the Financial page of company preferences, select **Use with QuickBooks**.

   The QuickBooks Connection Wizard is launched to assist with making the connection.
9. Make sure the RDS Server is running and that your QuickBooks financial software and company file is open on the QuickBooks computer and then select **Next**.
10. In the Authorize Remote Access dialog, select **Yes, always, when server is available** and then enter your login name and password (as set up on the server).

With this configuration, both the RDS Server and your financial company file must be open on the QuickBooks computer for the connection to succeed. But you will not be prompted for a login name and password on the Point of Sale computer for each connection.

When you select **Continue**, the RDS Client connects to the RDS Server, which authenticates the login credentials and makes the connection to your financial software (if company file open). The Point of Sale QuickBooks connection wizard confirms the connection was successful. Select **Finish** to close the Wizard and then **Save** to exit company preferences (or **Leave** from the Setup Interview).

Port Settings

The Remote Data Sharing Server/Client applications must have the same Server Port setting. By default, both applications are assigned to the same Server Port. It is recommended you keep the default settings. If you change the setting for either application, you must mirror that change in the other application.

Running Financial Exchanges

This procedure assumes you have configured as described above. If you have changed your login preferences in QuickBooks, adjust this procedure accordingly.

On the QuickBooks computer:

1. Launch your QuickBooks financial software and open your company file.
2. From the Windows Start menu, select **All Programs > QuickBooks > Remote Data Sharing Server**. The RDS Server dialog is opened.
3. Select **Start** to run the server.

On the Point of Sale Server Workstation:

The Remote Data Sharing Client application is launched automatically whenever you attempt to access QuickBooks financial software. It does not have to be started on the Point of Sale workstation before initiating an exchange.

1. Initiate a Financial Exchange (as part of your End of Day procedure or from the Financial menu/ Center).
2. If prompted, enter the RDS login name and password.

The progress and result of the Financial Exchange are displayed.

If You Need More Information

With your current Financial Exchange. In Point of Sale, select **View Activity Log** or **Help** from the Financial Exchange status dialog. The log provides a list of records exchanged and notice of any errors encountered.

Configuring and using the RDS Applications. Select **Help** on either the Server or the Client RDS windows.

Configuring Financial Exchange options. In Point of Sale, search the in-product help using keyword “financial exchange.”