

Frequently Asked Questions

If you have any questions about ConnectBooks, please use the Table of Contents below to quickly locate the information you need.

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1. What is ConnectBooks for Sage 50–U.S. Edition?

Answer: ConnectBooks is an app that enables its users to access accounting data stored in their Sage 50–U.S. Edition (formerly Sage Peachtree) data.

2. Do I have to download ConnectBooks from marketplace stores?

Answer: Yes. Only if you download from the iTunes Store (for iOS devices) and Android Marketplace will you be automatically notified when updates are made. After you subscribe to ConnectBooks on our website, go to the appropriate store to download for free. Use the following websites:

iTunes Store: <http://www.apple.com/itunes/affiliates/download/>

Android Marketplace: <https://www.google.com/enterprise/marketplace/?pli=1>

3. How much does it cost?

Answer: The Single-User Edition of our initial offering is FREE. Our Multi-User Edition is only \$9.99 per month per user with quarterly payments.

4. What types of mobile devices can I use?

Answer: ConnectBooks can be used with the any iPhone, iPad, iPod Touch running iOS version 4.2 or higher, and any Android device running Android version 2.2 or higher.

5. How can I get ConnectBooks to remember my Log In credentials?

Answer: Before you logout for the first time—on the Logout screen—simply make sure that the *Auto-login status* field is set to “On” before touching the Logout button. This will store your Password and ID for subsequent use.

6. How can I sign up for ConnectBooks?

Answer: There are many ways to subscribe to the ConnectBooks service. You can start by downloading the ConnectBooks app at the iTunes Store or Google Play Store, or simply visit <http://PT.ConnectBooks.com> and sign up there.

7. I have been using the free edition of ConnectBooks and I am impressed. How can I upgrade to the Multi-User Edition?

Answer: Simply login to the ConnectBooks website at <http://PT.ConnectBooks.com> and change your subscription status under the "Subscriptions" tab from the Free Edition to

the Multi-User Edition. Then log back in to ConnectBooks via the Connector on your computer, and the process will be complete! Your subscription status will be updated.

8. What versions of Sage 50–U.S. Edition are supported by ConnectBooks?

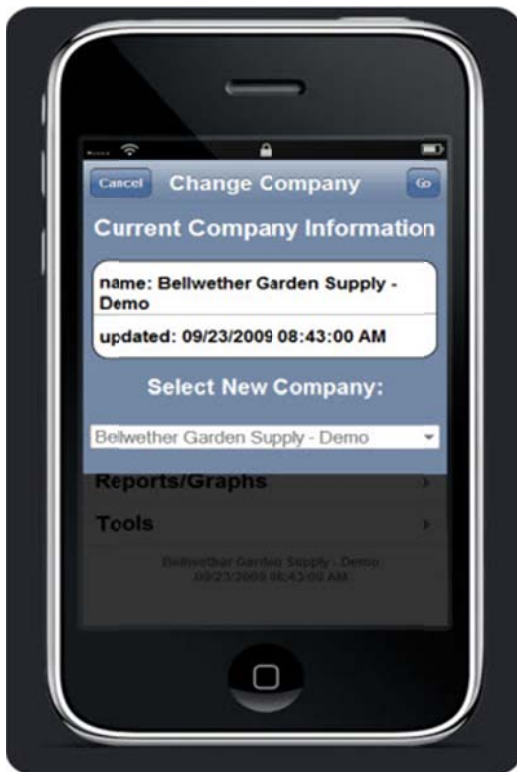
Answer: Most versions of Peachtree produced for the last three years (initially from 2010 to 2013) including the newest 2013 version, Sage 50–U.S. Edition, are compatible with ConnectBooks.

9. Does ConnectBooks support multiple companies?

Answer: Yes, if you have more than one company, you will be prompted to choose the desired company when you launch the app. However, you will only be able to view multiple companies if you are a Multi-User subscriber.

10. How do I change companies when using ConnectBooks?

Answer: While viewing the Main Menu, the currently selected company will be displayed at the bottom of the screen. Touch the company name and the Change Company screen is presented. Touch the dropdown menu to choose the company you would like to view in the *Select New Company* field as shown below:



11. Can I change between companies on-the-fly, or do I have to log out and log back in?

Answer: Yes you can—no need to log in or out! From the Main Menu, touch the bottom of the screen where your current company name is displayed. A dropdown menu will show you the available companies that are available to be viewed.

12. How is the Admin[istrator] determined?

Answer: The individual who subscribes to ConnectBooks becomes the Administrator with full unrestricted access rights. If you have subscribed 3 users, the Administrator user will take up one of the three user slots.

13. Is there a way to log in automatically?

Answer: Yes! From the Main Menu:

1. Select Tools from Main Menu
2. Select Defaults option
3. Change *autologin* field from "Off" to "On"
4. Touch Save Settings button

14. I'm concerned about someone seeing my salary. How does ConnectBooks handle this?

Answer: The **Pay Info** button is only enabled for the person viewing it. They are unable to see other employee's pay information.

15. Why doesn't ConnectBooks allow me to create and update invoices and sales orders?

Answer: Version 1 is only our initial release in the Sage mobile app arena, and unfortunately, this is not a feature that is available for ConnectBooks yet. Version 2 is slated for release later this year with many exciting new features on the horizon that will make your ConnectBooks significantly more versatile. If you have a feature that you would like to see in version 2, please use the **Feature Request** button within the Tools Menu Option of our app to let us know!

16. The Accounts Menu displays a lot of information that I don't care about. How can I get rid of unwanted accounts?

Answer: Touch the **Settings** button when in Accounts and you can choose to show or hide accounts at your pleasure. Accounts in bold will be displayed. As you touch an

account, it will toggle between being shown and hidden. Touch **Save** to confirm your choices.

17. How can I see Sage 50–U.S. Edition reports in ConnectBooks?

Answer: ConnectBooks has a feature that enables you to access reports that are necessary to you as an executive in your company. However, in order to make the reports available, the following steps should be taken:

- Generate your favorite reports using the native facilities within Sage 50–U.S. Edition software (you can also use this approach to insert your own graph).
- Create PDFs of the reports that you want to review in ConnectBooks making sure to give the report a name that will be easy for you to recognize.
- Copy the selected PDFs into the following directory and they will be immediately available for you to review on your smart phone via ConnectBooks:

C:\App Data\CB\PT\1\CompanyName\Reports

Note: You may have multiple companies, in which case each set of reports should be inserted beneath the appropriate company.

18. I would like different types of graphs to use in Reports/Graphs. How can I add different types of graphs?

Answer: The graphs in ConnectBooks are predefined. If you would like to see your graph type in future versions of ConnectBooks, submit your idea using the **Feature Request** option within the *Tools* menu option. You can also create your graph using Peachtree (or Sage 50–U.S. Edition), create a PDF, and insert it into the Reports directory as described in the previous FAQ.

19. When searching for a check, estimate, or invoice by number, can I do a wildcard search (i.e., all invoices starting with 5)?

Answer: A Yes! Use a decimal point (.) anywhere you want a wildcard. For instance, searching for .5. will search for a 5 anywhere in the reference number, returning results such as '5003', '39501', or '12345'.

20. Does Sage 50-U.S. Edition have to be open in order to update my data on the ConnectBooks server?

Answer: No! Our update utility will perform the update so long as your computer is on and there is an Internet connection.

21. Is ConnectBooks available for the Mac?

Answer: Unfortunately, no. Sage does not support Mac computers with their SDK (software development kit), and as such, we have no way of retrieving data from Sage on that platform. If this should change, we will begin development to support Mac computers.

22. How long does it take to download content?

Answer: This is dependent on your connection speed, which can be affected by signal strength, mobile reception, and interference. Connecting using local Wi-Fi will offer the fastest download speeds.

23. Why isn't my content being updated to keep pace with the changes in my Sage 50–U.S. Edition accounting data in the office?

Answer: This is dependent on how often you synchronize (sync) the data between Sage 50–U.S. Edition and ConnectBooks. Our initial versions, offer one sync per day for the Free Edition and three times per day for the Multi-User Edition. In either case, your company management sets the times when the syncs will be done to provide maximum coverage and synchronization. Future versions of ConnectBooks will feature fully secure real-time connections to your accounting data.

24. I have an Android phone. Why am I having difficulty displaying my PDF reports?

Answer: In Android phones, PDFs are rendered in a separate frame. In order to view them, make sure you have the Adobe Reader app (or equivalent) downloaded to your phone. In ConnectBooks, touch the name of the desired report and, after a moment, you will be informed that the report is ready. Touch the **View Report** button. It will take a moment for your report to download. When finished, a Down Arrow will appear at the top of your screen in the Notification Area. Touch the Down Arrow and drag it to the bottom of your screen. The report will appear at the top of the Notifications list. Touch the report name to see your report.

When you are finished viewing your report, touch the **Back** button on your device to return to ConnectBooks.

25. Q. I am concerned about protecting my accounting information. How does ConnectBooks protect the data?

Answer: When ConnectBooks copies the Sage 50–U.S. Edition data from your computer to the ConnectBooks server, the data is fully encrypted for your protection. It is likewise encrypted when transmitting data from our server to your mobile device.

