

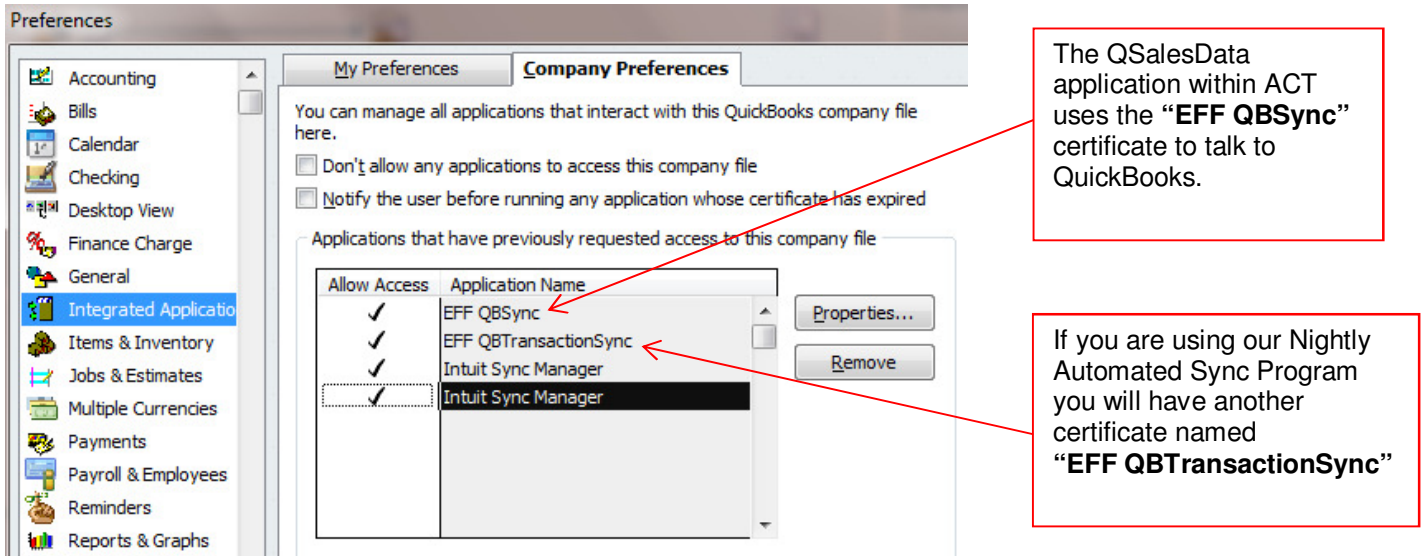
Recreating the QuickBooks Certificates

There are times where you may need to delete and recreate your QuickBooks certificate files that allow QSalesData to talk to QuickBooks. Here are some situations that may cause you to go through the re-creation process.

- You upgraded your version of ACT
- You changed your QuickBooks Admin password

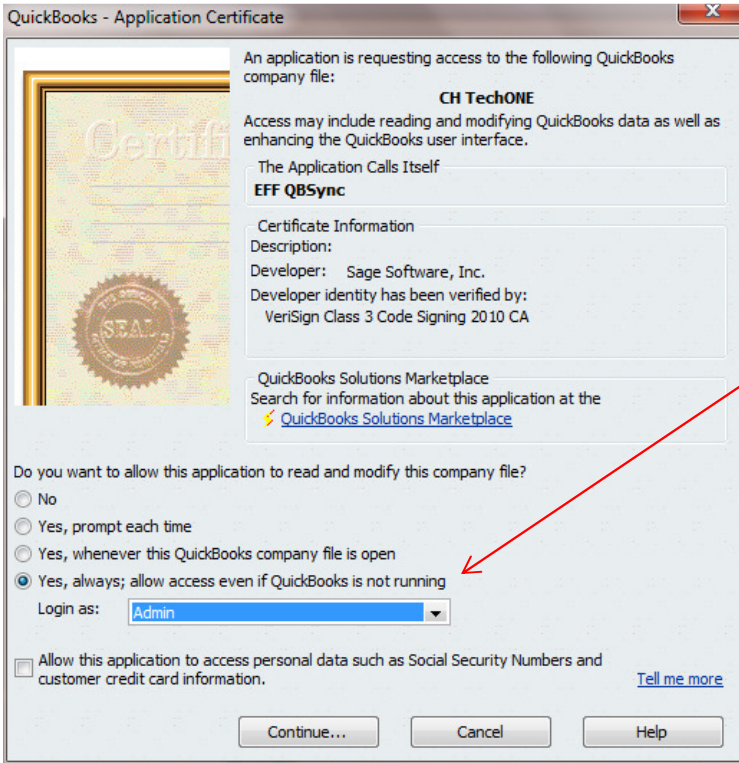
Here are the procedures for removal of your existing certificates in QB and how to re-create them.

1. Login to QuickBooks using the Admin login
2. Switch to Single-User mode (File > Switch to Single-User Mode)
3. In QB go to Edit > Preferences
4. Select the Integrated Applications Section in Preferences and go to the Company Tab. You will get a screen similar to the one below. This will show you the current certificates that are in place.



5. Highlight the EFF QBSync certificate and click on the REMOVE button. Say YES to the Are You Sure? Question that pops up. If you are also troubleshooting a communication issue with the Nightly Sync Program, then click on the EFF QBTransactionSync certificate and REMOVE that one as well.
6. Close out of the Preferences window in QuickBooks. Now that the existing certificates have been deleted, we need to recreate the new certificates.
7. To re-create the certificate that is used from within ACT to communicate with QuickBooks, leave QuickBooks open and open up ACT and pull up a record in ACT that you know is linked to QuickBooks. Click on the REFRESH DATA FROM QB button on the QSalesData toolbar.

- After clicking on the REFRESH button, QuickBooks should start flashing and you should get a window similar to the one below.



Select the “Yes, always; allow access even if QuickBooks is not running” option and choose the Admin user from the Login As pulldown list.

- Click on the CONTINUE button and click on DONE when prompted with the second window.
- The new EFF QBSync Certificate has been created and the QSalesData toolbar and features from within ACT should now communicate properly with QuickBooks.
- If you also need to re-create the certificate for the nightly sync program (EFF QBTransactionSync) then open



- up the
- Edit an existing synchronization entry, and click on the SAVE button. After clicking on SAVE, QuickBooks should start flashing, and you should be prompted to create another certificate. Create this certificate with the same settings you used in Step 8 above.
- Your QSalesData program should now be all set to communicate from within the ACT program and during the nightly sync process.