

Preparing QuickBooks For Use With Fi-Soft Merchant Edition SP Software

* For installations of Fi-Soft Merchant Edition SP software in a multi-user environment, the path to the QuickBooks data file must be identical for each computer that our software is installed on. This can be checked by opening QuickBooks on each computer and pressing the F2 key. The file location path will display.

1. Fi-Soft Merchant Edition SP 2.0 is PA-DSS 2.0 compliant when implemented and used according to our Implementation Guide. To download the Implementation Guide, [click here](#) or contact Fi-Soft directly for a copy. It is your responsibility to review and fully implement all items contained in the Implementation Guide.
2. Contact your merchant account sales representative to confirm that your merchant account and payment gateway have been activated and fully configured. Have your payment gateway login available.
3. If you are using Windows Vista operating system, your “User Account Controls” must be turned on. If you are using Windows 7, or Windows 2008 Server operating system, your “User Account Controls” must be set above the lowest level. Reboot your computer after updating your settings.
4. Install any critical Microsoft updates for your operating system.
5. Make sure that your version of QuickBooks has the most recent updates installed. This can be checked by utilizing the QuickBooks automatic update option.
6. Make sure QuickBooks is set for deposits to go into the Undeposited funds account:

For QuickBooks 2009 and earlier:
 - A. Go to Edit pull-down menu, select Preferences.
 - B. Select Sales & Customers, click on the Company Preference tab.
 - C. Check the box “Use Undeposited Funds as a default deposit to account.”
For QuickBooks 2010 and newer:
 - A. Go to Edit pull-down menu, select Preferences.
 - B. Select Payments, click on the Company Preference tab.
 - C. Check the box “Use Undeposited Funds as a default deposit to account”.
7. Our software requires the use of three custom fields in the QB customer section under the “Additional Info” tab. If you have used all available custom fields, you must clear the names of three of the existing fields.
8. Special Note for all versions of QuickBooks 2011 and newer: In QuickBooks preferences make sure the box to “Keep QuickBooks running for quick startups” is unchecked (off) for each user login. Our software doesn’t support multiple QuickBooks Company files being open at the same time on the same system.
9. Make a current backup copy of your QuickBooks file. This should be done on removable media (cd, disk, zip drive, memory stick, etc...) and not done on the same computer system/server you are working on.
10. You must be able to log into QuickBooks using the “Admin” username and password.
11. Make sure that you have a working high-speed internet connection and that you temporarily disable any spam/virus protection, and personal firewalls on the computer in which Fi-Soft Merchant Edition SP software will be installed. These items can be re-enabled after installation.