

Financial Webinar - January 2017

Access to RightNetworks, Customer Accounts, Invoicing and Recording Deposits

Key items to remember

- ▶ Chapters must use the file on RightNetworks
- ▶ Notify Regional Treasurer if changes to RN or QB passwords
- ▶ Chapter Treasurers please submit your December Financial reports to your Regional Budget Committee Mentor
- ▶ Chapter Treasurers confirm that 2016-2017 Budget has been loaded and Budget vs Actual reports are provided to the chapter
- ▶ Utilize budget committee and committee chairs in developing 2017-18 budget. Build from the bottom up
- ▶ Items to include in your 2017-2018 Budget - \$540 RightNetworks annual subscription to be paid with the chapter Per Capita submission. \$224.14 Quickbooks Pro cost to upgrade 2014 QB version
- ▶ Prior year adjustments will return an error message
 - ▶ Create an income account: Void check from prior period
 - ▶ Create an expense account: Void deposit from prior period
 - ▶ Submit a deposit entry for voided check in the current month to offset the outstanding check

Eastern Region Budget Committee

Connie Page (ctpage21@yahoo.com) Mentor: Baltimore County, Bucks County, Central NJ, Greater Union County, Northern VA, Westchester County

Jacqueline Parker (jacquelinelarue@icloud.com) Mentor: Mercer County, Montgomery County, North Jersey, Philadelphia, Queens, Western Maryland

Debra Allen-Davis (deballendavis@gmail.com) Mentor: Boston, Greater Albany, Morris County, National Harbor, Newton, Pittsburg, Suffolk County

Kim Scott (kscottcpa@Hotmail.com) Mentor: Southern Maryland, Stamford Norwalk, Greater Suburban Maryland, Washington DC, Westchester Cty - Fin Sec

Crystal Mullins (mullins2@mac.com) RightNetworks Coordinator for Presidents and Financial Secretaries

Thank YOU!!!!

Putting Right Networks on Your Desktop/ Device

Presented by Crystal Mullins

Accessing RightNetworks

Get Started in 3 Easy Steps!

We've pulled together all the information you need for a successful set up of your hosted desktop. The instructions below will guide you through the setup process.
Get started!



Step 1: The first thing you'll need to do is log in with your credentials above and [create and verify your security profile](#). This will allow us to provide secure access to you, and only you!



Step 2: Time to get things set up. [Answer a few questions about your device](#), run the setup wizard, select your files to upload and you're in the cloud!



Step 3: You're ready to work in your hosted desktop with anytime, anywhere access to your files and data!

Need help getting started?

Visit our [Helpdesk](#) or follow these helpful links for answers to the most frequently asked account setup questions.

- [How do I print?](#)
- [Can I change my password?](#)
- [Can I change my account?](#)
- [How do I submit a ticket?](#)
- [What other apps can I host?](#)
- [How do I manage my files?](#)

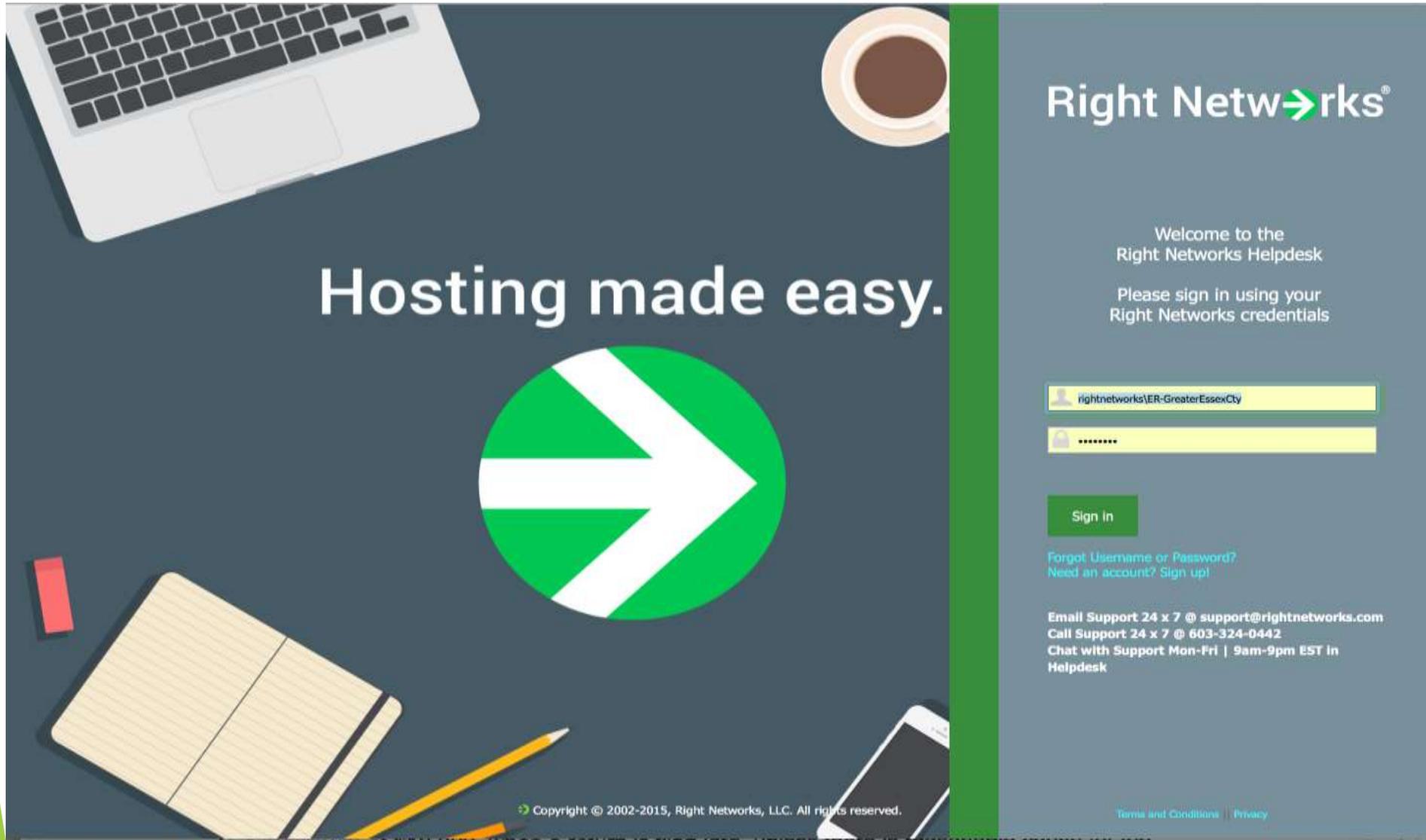
Using Welcome email

- Start with Step 2
- Click on the link in Step 2

Click on the link below

<https://fs.rightnetworks.com/adfs/ls/idpinitiatedsignon.aspx?>

Enter Chapter UserName and Password



The image shows a login page for Right Networks. The left side features a dark blue background with illustrations of a laptop, a coffee cup, a notebook, a pencil, and a smartphone. A large green circle with a white arrow points to the right. The text 'Hosting made easy.' is prominently displayed. The right side is a light blue panel with the Right Networks logo, a welcome message, and a login form. The form has two input fields: the first contains the username 'rightnetworks\ER-GreaterEssexCty' and the second contains a masked password '*****'. A green 'Sign In' button is below the fields. At the bottom, there are links for 'Forgot Username or Password?' and 'Need an account? Sign up!'. Contact information for email, call, and chat support is provided. The footer contains copyright information and links for 'Terms and Conditions' and 'Privacy'.

Right Networks®

Welcome to the
Right Networks Helpdesk

Please sign in using your
Right Networks credentials

Sign In

[Forgot Username or Password?](#)
[Need an account? Sign up!](#)

Email Support 24 x 7 @ support@rightnetworks.com
Call Support 24 x 7 @ 603-324-0442
Chat with Support Mon-Fri | 9am-9pm EST in Helpdesk

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[Terms and Conditions](#) | [Privacy](#)

Confirm Operating System

Right Networks®

[Home](#) [Edit my Profile](#) [My Activities](#)

[Submit a request](#)

[Crystal Mullins](#) ▾

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Search the Knowledgebase

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[ACCOUNT HELP](#)

[APPLICATION HELP](#)

[CONNECTING](#)

[PRINTING & SCANNING](#)

[QUICKBOOKS](#)

Getting Started: Select Your Operating System



[Windows](#)



[Mac](#)

MAC Operating System

The background features a series of overlapping, semi-transparent green triangles and polygons of various shades, ranging from light lime green to dark forest green. These shapes are primarily concentrated on the right side of the frame, creating a dynamic, layered effect against the white background.

Select Quickbooks

How Can We Help?

Search the Knowledgebase

SEARCH

Note: Treasurers name is identified since she holds the RN subscription. Ensure you do not change anything related to her subscription or profile information

ACCOUNT HELP

APPLICATION HELP

CONNECTING

PRINTING & SCANNING

QUICKBOOKS

Getting Started: Select Your Application (PC)

QuickBooks

Sage50

How Can We Help?

Search the Knowledgebase

SEARCH

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QUICKBOOKS

Getting Started: QuickBooks Setup (Mac)

Step 1 - Preparing Your Mac to Connect to Right Networks

Step 2 - Preparing Your Existing QuickBooks Data for Upload

Step 3 - Restoring Your QuickBooks Data on Right Networks

Download TSPrint for MAC

Right Networks / Knowledgebase / Getting Started

Follow

ACCOUNT HELP

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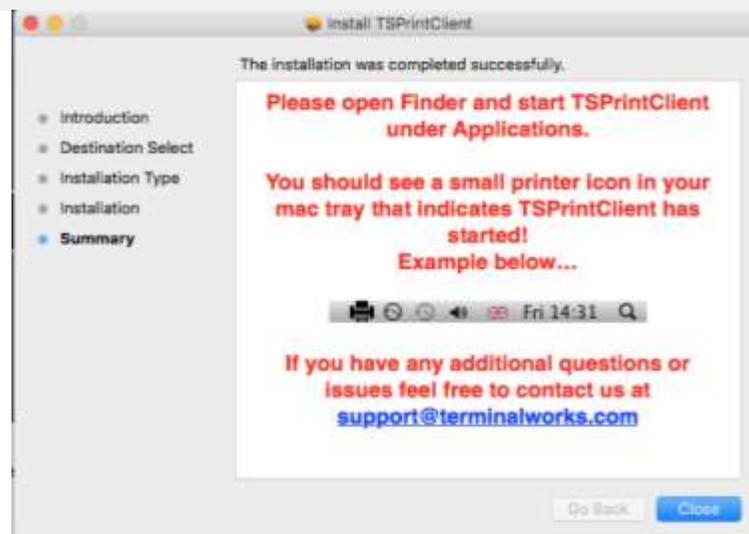
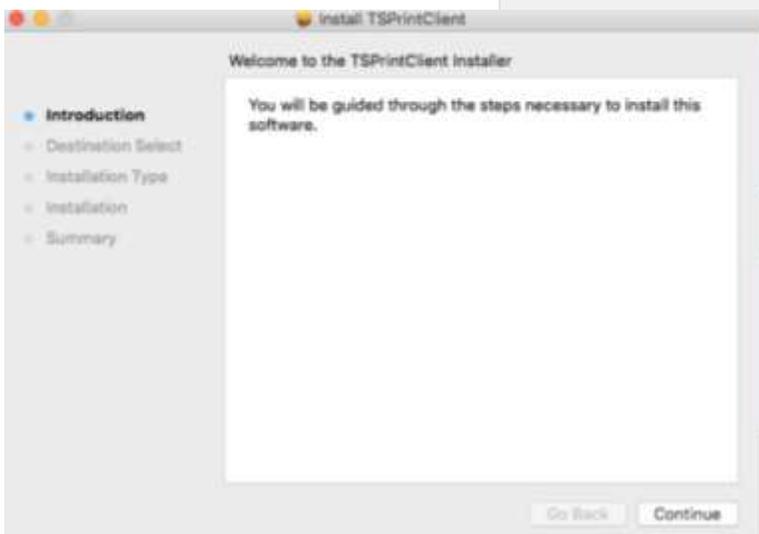
QUICKBOOKS

Getting Started: QuickBooks Setup (Mac)

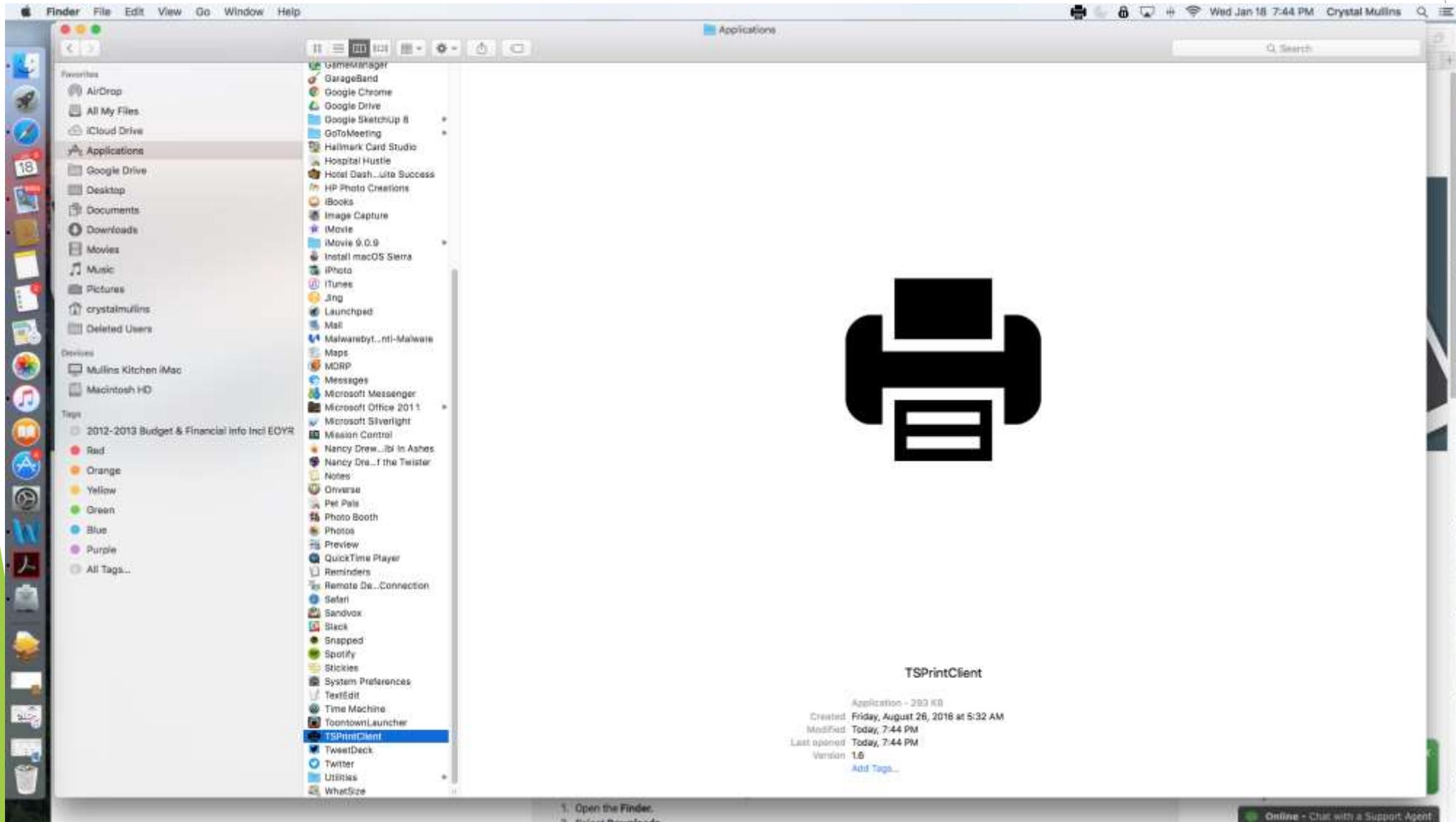
Step 1 – Preparing Your Mac to Connect to Right Networks

1. Download and install **TSPrint for Mac** if you plan on printing from the hosted environment: [Download TSPrint](#).
2. Once installed, go to your **Applications** folder and find **TSPrint**. Double-click the icon to launch it. If it launches properly, you should see a printer icon listed in the top right of your screen by the time and date on the Menu bar.
3. Please select the button below and insert the username sent to you in your **Welcome Email** to download the pre-configured **Remote Desktop settings**.

[Click Here](#)



See Printer icon - process successful!



Return to Step 1 and 'Click Here'

Right Networks®

Home Edit my Profile My Activities Submit a request Crystal M/ing

How Can We Help?

Search the Knowledgebase

SEARCH

Right Networks / Knowledgebase / Getting Started

ACCOUNT HELP

APPLICATION HELP

CONNECTING

PRINTING & SCANNING

QUICKBOOKS

Getting Started: QuickBooks Setup (Mac)

Follow

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[Click Here](#)

1. Move the downloaded file to the desktop.

Question for our helpdesk? [Click here to chat with a Support Agent.](#)

Download icon on desktop

Right Networks / Knowledgebase / Getting Started

Getting Started: QuickBooks Setup (Mac)

Step 1 – Preparing Your Mac to Connect to Right Networks

1. Download and install **TSPrint for Mac** if you plan on printing from the hosted environment: [Download TSPrint](#).
2. Once installed, go to your **Applications** folder and find **TSPrint**. Double-click the icon to launch it. If it launches properly, you should see a notification in the top right of your screen by the time and date on the Menu bar.

Download a shortcut

Username

Click Here

Follow steps

1. Move the downloaded file to the desktop.
 1. Open the **Finder**.
 2. Select **Downloads**.
 3. Find the **RightNetworks.rdp** file.
 4. Click on the **RightNetworks.rdp** file and drag it to the **Desktop**.
2. Download and install the correct Remote Desktop for Macs: [newer \(Intel-based\)](#).
3. Once installed, go to your **Applications** folder and find **Microsoft Remote Desktop**.

Note: it may be located at the end of the applications since this was the last item downloaded.

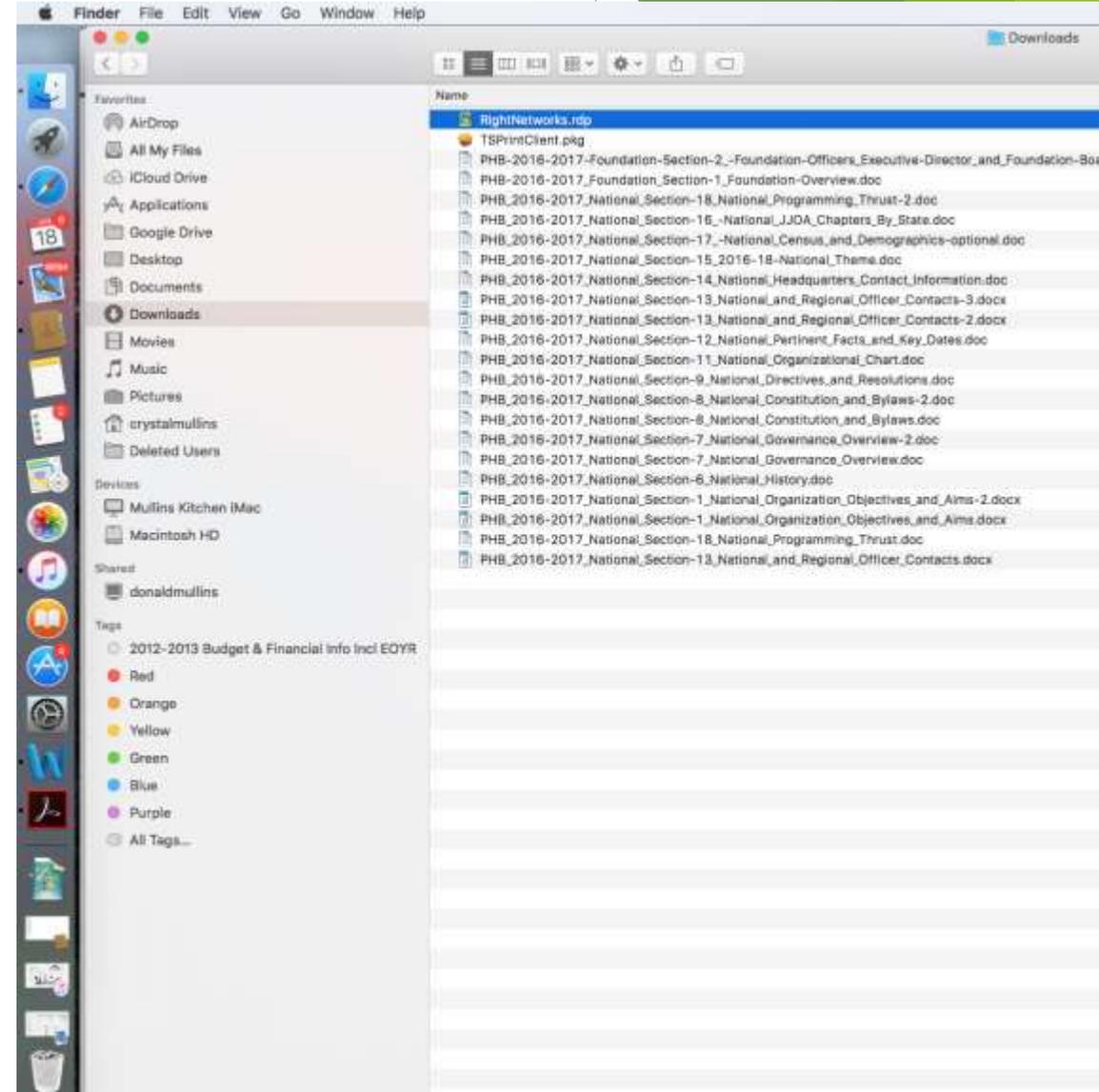
4. Double-click the **Microsoft Remote Desktop** icon.

Note: (Optional) Right-click on the **Microsoft Remote Desktop** icon in the dock, highlight **Options** and select **Keep in Dock**.

5. With the application open select **File** in the upper left hand corner of your screen.
6. Select **Import**.
7. Select **Desktop**.
8. Double click on the **RightNetworks.rdp** file.
9. The new connection should now be displayed in the main window under **My Desktops**.
10. Double-click the new connection to log in.
11. Alternatively you can double click on the **RightNetworks.rdp** file that should now be located on your desktop.

Note: If when double clicking on the shortcut the remote desktop window does not open in full-screen you may have multiple applications that open .rdp files. If that is the case please use the steps below to set **Microsoft Remote Desktop** as the default application for .rdp files:

1. Right-click on the **RightNetworks.rdp** shortcut on your desktop.
2. Select **Get Info**.



Download and connect Remote Desktop

Step 1 – Preparing Your Mac to Connect to Right Networks

1. Download and install **TSPrint for Mac** if you plan on printing from the hosted environment: [Download TSPrint](#).
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[Click Here](#)

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1. Right-click on the **RightNetworks.rdp** shortcut on your desktop.
2. Select **Get Info**.
3. Open the dropdown menu under **Open With**.
4. Select **Microsoft Remote Desktop**.

Click link

Mac App Store Preview

What's New What is OS X OS X Apps How to Upgrade Tech Specs

Microsoft Remote Desktop By Microsoft Corporation

Open the Mac App Store to buy and download apps.



[View in Mac App Store](#)

Free

Category: [Business](#)
Updated: Jan 17, 2017
Version: 8.0.37
Size: 14.8 MB
Language: English
Seller: Microsoft Corporation
© 2016 Microsoft Corporation. All rights reserved.
Rated 4+

Compatibility: OS X 10.9 or later, 64-bit processor

Customer Ratings

We have not received enough ratings to display an average for the current version of this application.

All Versions:
★ ★ ★ 2287 Ratings

Description

With the Microsoft Remote Desktop app, you can connect to a remote PC and your work resources from almost anywhere. Experience the power of Windows with RemoteFX in a Remote Desktop client designed to help you get your work done wherever you are.

[Microsoft Corporation Web Site](#) [Microsoft Remote Desktop Support](#) [Application License Agreement](#) [More](#)

What's New in Version 8.0.37

We have made the following updates:
• Security enhancement: When you connect to desktops and apps that redirect local resources to the remote session, you need to grant permission for Remote Desktop to access those resources.

Screenshots



Download and Install

Microsoft Remote Desktop

With the Microsoft Remote Desktop app, you can connect to a remote PC and your work resources from almost anywhere. Experience the power of Windows with RemoteFX in a Remote Desktop client designed to help you get your work done wherever you are.

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What's new in 8.0.37

We've fixed the following in this release:

- Security enhancement: When you connect to desktops and apps that redirect local resources to the remote session, you need to grant permission for Remote Desktop to access those resources.
- Connections established from an RDP file or URI scheme are now automatically imported into the Connection Center.
- New menu icons.
- More default resolutions available based on user feedback.
- Fixed an issue with the URI schema where pipes (|) were not parsed correctly.

Don't know how to configure your PC to access it remotely? Download the Remote Desktop assistant on your Windows PC and let it do the work for you: <https://aka.ms/RDSetup>.

We are improving our app. Test drive the new experience and share your feedback: <https://aka.ms/rdmac/feedback>.

Don't show this again Close

Microsoft Remote Desktop

With the Microsoft Remote Desktop app, you can connect to a remote PC and your work resources from almost anywhere. Experience the power of Windows with RemoteFX in a Remote Desktop client designed to help you get your work done wherever you are.

What's New in Version 8.0.37

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- Security enhancement: When you connect to desktops and apps that redirect local...

Information

Category: Business
Updated: Jan 17, 2017
Version: 8.0.37
Price: Free
Size: 14.8 MB
Family Sharing: Yes
Language: English
Seller: Microsoft Corporation
© 2018 Microsoft Corporation. All rights reserved.

Rated 4+
Compatibility: OS X 10.9 or later, 64-bit

More by Microsoft:

- Microsoft Office
- OneDrive
- OneDrive Productivity
- OneDrive Productivity
- Microsoft Band Sync

Once installed find Remote Desktop

Getting Started: QuickBooks Setup (Mac)

Step 1 – Preparing Your Mac to Connect to Right Networks

1. Download and install **TSPrint for Mac** if you plan on printing from the hosted environment; [Download TSPrint](#)
2. Once installed, go to your **Applications** folder and find **TSPrint**. Double-click the icon to launch and you should see a printer icon listed in the top right of your screen by the time and date on the Menu Bar.
3. Please select the button below and insert the username sent to you in your **Welcome Email to Right Networks** and update your **Remote Desktop settings**.

[Click Here](#)

1. Move the downloaded file to the desktop.
 1. Open the **Finder**.
 2. Select **Downloads**.
 3. Find the **RightNetworks.rdp** file.
 4. Click on the **RightNetworks.rdp** file and drag it to the **Desktop**.
2. Download and Install the correct Remote Desktop for Macs: newer (Intel-based).
3. Once installed, go to your **Applications** folder and find Microsoft Remote Desktop.

Note: It may be located at the end of the applications since this was the last item downloaded.

4. Double-click the **Microsoft Remote Desktop** icon.

*Note: (Optional) Right-click on the **Microsoft Remote Desktop** icon in the dock, highlight **Options** and select **Options**.*

5. With the application open select **File** in the upper left hand corner of your screen.
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1. Right-click on the **RightNetworks.rdp** shortcut on your desktop.
2. Select **Get Info**.

Right Networks / Knowledgebase / Getting Started

ACCOUNT HELP
APPLICATION HELP
CONNECTING
PRINTING & SCANNING
QUICKBOOKS

Desktop

Images

- Debutante Headshot.jpg
- DSCN0760.jpg
- DSCN3667 (1).jpg
- DSCN3667.jpg
- Wahg7 hwa...stEzF8.JPG
- Screen Shot... 6:22:35 PM
- Screen Shot... 1:39:48 PM
- Screen Shot... 2:48:58 PM
- Screen Shot... 3:08:26 PM
- Screen Shot... 7:19:17 PM
- Screen Shot... 1:35:52 PM
- Screen Shot... 7:26:42 PM
- Screen Shot... 7:39:45 PM
- Screen Shot... 7:40:01 PM
- Screen Shot... 7:44:07 PM
- Screen Shot... 7:44:27 PM
- Screen Shot... 7:44:58 PM
- Screen Shot... 7:45:32 PM
- Screen Shot... 7:46:21 PM

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2. Select **Get Info**.
3. Open the dropdown menu under **Open With**.

Remote Desktop Connection

The image shows a Mac desktop environment. In the foreground, a web browser window displays the Right Networks helpdesk page. The page title is "Right Networks" and the URL is "helpdesk.rightnetworks.com". A "Remote Desktop Connection" dialog box is open, prompting for credentials. The "User name" field contains "ER-DreaderEssexCity", the "Domain" is "RIGHTNETWORKS", and the "Add user information to your keychain" checkbox is checked. Below the dialog, the helpdesk page shows a "Getting Started: QuickBooks Setup (Mac)" article with a "Step 1 - Preparing Your Mac to Connect to Right Networks" section. The steps listed are: 1. Download and install TSPrint for Mac if you plan on printing from the... 2. Once installed, go to your Applications folder and find TSPrint. Double-click it should see a printer icon listed in the top right of your screen by the... 3. Please select the button below and insert the username sent to you in the Remote Desktop settings. A "Click Here" button is visible below the steps. In the bottom right corner of the browser, there is a "Question for our helpdesk?" chat button and an "Online - Chat with a Support Agent" button. In the background, a Microsoft Remote Desktop connection window is open, showing the computer name "aspw1.rightnetworks.com" and a list of examples: "MyPC, name.microsoft.com, 192.168.2.8". To the right of the browser, a desktop view is visible with a grid of many "Screen Shot" files, each with a date and time stamp. The desktop background is a blue and white abstract image. The top of the screen shows the Mac menu bar with the date "Wed Jan 18 7:54 PM" and the user name "Crystal Mullins".

Access RightNetworks

- Enter Chapter Username/password
- Click 'ok'
- Blue RightNetworks Desktop
- Click on Quickbooks Icon
- Enter QB Username and Password

Right Networks / Knowledgebase / Getting Started

Getting Started: QuickBooks Setup (Mac)

Remote Desktop Connection

Enter your credentials

These credentials will be used to connect to app17.rightnetworks.com.

User name: ER-GreaterEssexCo

Password:

Domain: RIGHTNETWORKS

Add user information to your keychain

Cancel OK

1. Open the Finder.
2. Select Downloads.
3. Find the RightNetworks.rdp file.
4. Click on the RightNetworks.rdp file and

Note: It may be located at the end of the p

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11. Alternatively you can double click on the #

W76*** IMPORTANT NOTICE ***

Use of this system constitutes an agreement to the terms and conditions published at <http://www.rightnetworks.com/terms-conditions>. Unauthorized access to this server is strictly prohibited. You must be assigned an account to access this computer and the network. Unauthorized attempts to defeat or circumvent security features, to use the system for other than intended purposes, to deny service to authorized users, to access, utilize, alter, damage, or destroy information, or otherwise to interfere with the system or its operation is prohibited. Evidence of such acts may be disclosed to law enforcement authorities and result in criminal prosecution under the Computer Fraud and Abuse Act of 1986 and the National Information Infrastructure Protection Act of 1996, modified at section 3000 of Title 18 of the United States Code, or other applicable criminal laws.

QuickBooks Desktop Login

Enter a user name and password to log in to the company:

Greater Essex Co Chapter of Jack & Jill

User Name:

Password: [I forgot my password](#)

Passwords are case sensitive.

OK Cancel Help

Start 7:57 PM 1/18/2017

Quickbooks desktop

Username identified

The screenshot displays the QuickBooks Desktop Pro 2016 interface. The browser address bar shows 'aspw1.rightnetworks.com' and the window title is 'Greater Essex Co Chapter of Jack & Jill - QuickBooks Desktop Pro 2017(multi-user)(President)'. The main menu includes 'File', 'Edit', 'View', 'Lists', 'Favorites', 'Company', 'Customers', 'Vendors', 'Employees', 'Banking', 'Reports', 'Window', 'Help', and 'Special Offers'. The 'Reports' menu is open, showing options like 'Report Center', 'Memorized Reports', 'Commented Reports', 'Company Snapshot', 'Process Multiple Reports', 'Company & Financial', 'Customers & Receivables', 'Sales', 'Jobs, Time & Mileage', 'Vendors & Payables', 'Employees & Payroll', 'Banking', 'Accountant & Taxes', 'Budgets', 'List', 'Contributed Reports', 'Advanced Reports', 'Custom Reports', 'QuickReport (Ctrl+Q)', 'Transaction History', and 'Transaction Journal'. A central workflow diagram shows 'Enter Bills' leading to 'Create Invoices', which then branches into 'Estimates', 'Accept Credit Cards', 'Statement Charges', and 'Statements'. A green box with a red border is overlaid on the diagram, containing the following text:

QB Access:

- Financial Secretary - Accounts Receivable and Reports
- President - Reports only

Treasurer has administrative access

Printing Reports

Eastern Region, Jack and Jill Inc - QuickBooks Accountant Desktop 2016(multi-user)(Admin)

File Edit View Lists Favorites Accountant Company Customers Vendors Employees Banking Reports Window Help

Search Company or Help

Monthly_Balance Sheet- Mothers

Customize Report Comment on Report Share Template Memorize Print E-mail Excel Hide Header Expand Refresh

Print Reports

Settings Margins

Print to:

Printer: TSPrint PDF on TSPrintPrt01: Options...

File:

Note: To install additional printer assigner...

ORIENTATION:

Portrait

Landscape

PAGE BREAKS:

Smart page breaks

Page break after

Fit report to page

Fit report to width

Print Cancel Help Preview

Region, Jack and Jill Inc

et - Mothers Conference

s of October 31, 2016

Oct 31, 16

95,311.01

95,311.01

95,311.01

95,311.01

0.00

- Run Report
- File/Print
- TSPrint on Printer
- TSPrint PDF to save to desktop

Turn On Payroll

Accept Credit Cards

Order Checks & Tax

QuickBooks Online

See Financing Options

Statements

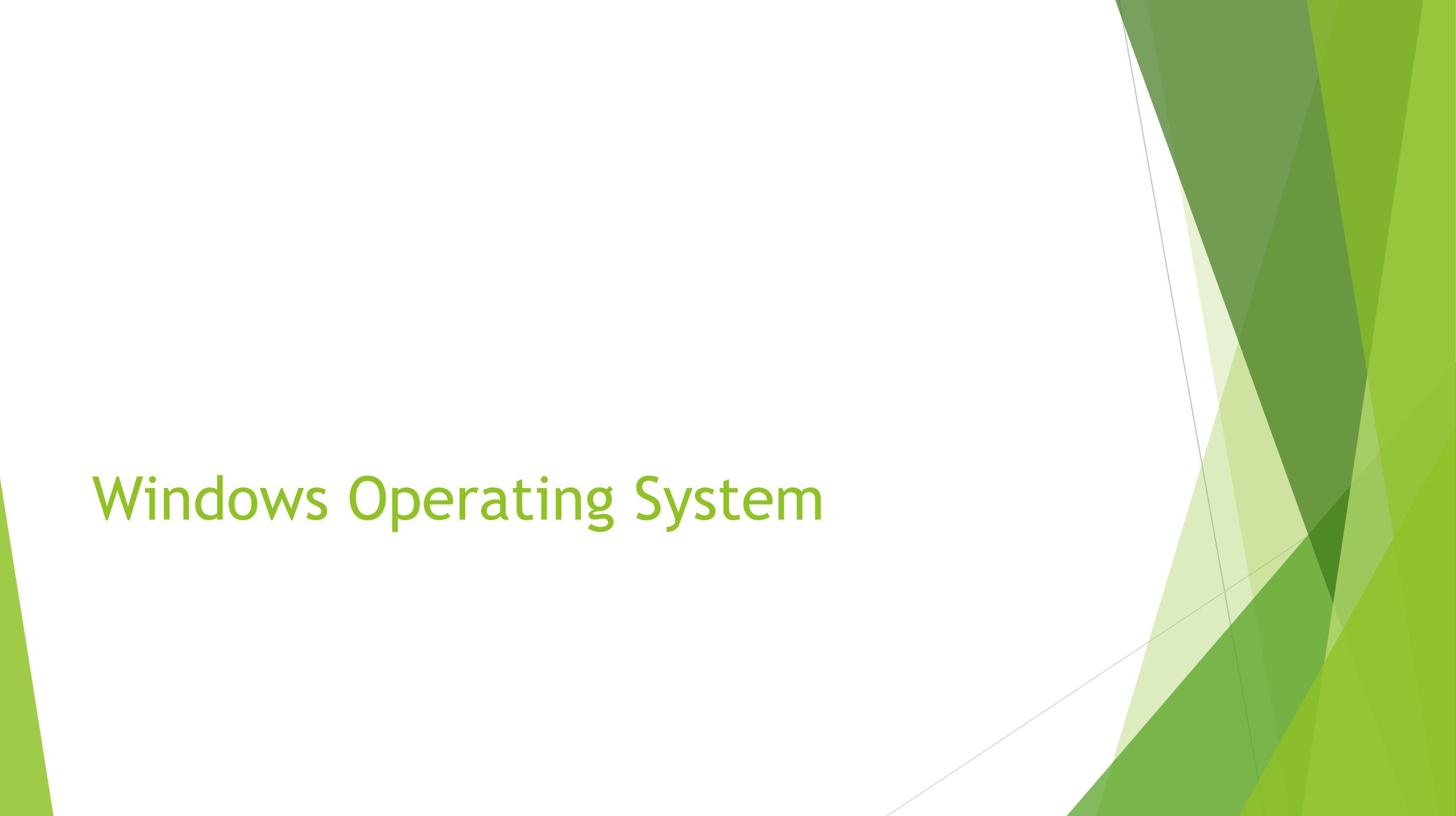
Refunds & Credits

Write Checks

Check Register

Print Checks

Windows Operating System

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Select Quickbooks

How Can We Help?

Search the Knowledgebase

SEARCH

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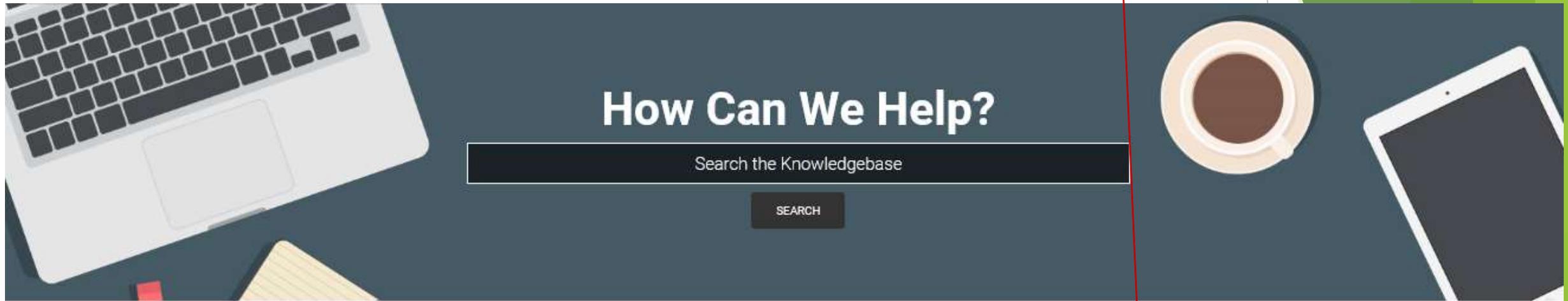
QUICKBOOKS

Getting Started: Select Your Application (PC)

QuickBooks

Sage50

Click link - Connect from a Windows Computer



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Follow

ACCOUNT HELP

APPLICATION HELP

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PRINTING & SCANNING

QUICKBOOKS

Getting Started: QuickBooks Setup (PC)

To setup your PC to log in to Right Networks all you need to do is run the Right Networks Setup Wizard tool. The Right Networks Setup Wizard tool will perform the following functions:

- Perform a check on your computer configuration to ensure you can connect to the hosted environment.
- Add a shortcut for Microsoft Remote Desktop that contains the Right Networks server information and your username pre-configured.
- Install the TSPrint and TSScan software to allow printing and scanning from the hosted environment.
- Allow you to choose which files you would like to upload to the hosted environment.

To download the program click on the following link: [Right Networks Setup Wizard](#)

- For detailed information on how to get started using the Setup Wizard please see the following article: [Connect from a Windows Computer](#)
- You can view a video playlist on how to get started using Right Networks [here](#).

Note: Should you encounter any problems with the Setup Wizard, please see our steps for manually [getting started](#).



Scroll down to w/o file upload

Setup Wizard without File Upload

1. Download the [Right Networks Setup Wizard](#).
2. When prompted run the application.
3. Once the application has launched you can then choose **No** to **Do you want to upload files**.

Right Networks®
Setup Wizard

Provide the following information to configure your computer to work with Right Networks.

Do you want to upload files?
 Yes No

Do you want this application to search for QuickBooks files on this computer to upload?
 Yes No

Enter your Right Networks credentials:

Username:

Password:

Quit Back Next

4. Enter your Right Networks username and password and select **Next**.
5. Select **Next**.
6. The Setup Wizard will then automatically configure your system to log in to Right Networks.
7. Once the application finishes configuring your system select the **Finish** button.
8. You will now see an icon on your desktop labeled **Right Networks**.
9. To connect to Right Networks you can double click on that icon and enter your password.

If you are not able to run the Right Networks Setup Wizard you can refer following article [Manual Right Networks Setup](#).

- Scroll down to section that allows setup with uploading a file
- If you upload a file, you will override what your Treasurer has already loaded in RightNetworks
- Click on link: [RightNetworks Setup Wizard](#)

Enter Chapter RN Username/Password



Right Networks® Setup Wizard

Provide the following information to configure your computer to work with Right Networks.

Do you want to upload files?
 Yes No

Do you want this application to search for QuickBooks files on this computer to upload?
 Yes No

Enter your Right Networks credentials:

Username:

Password:

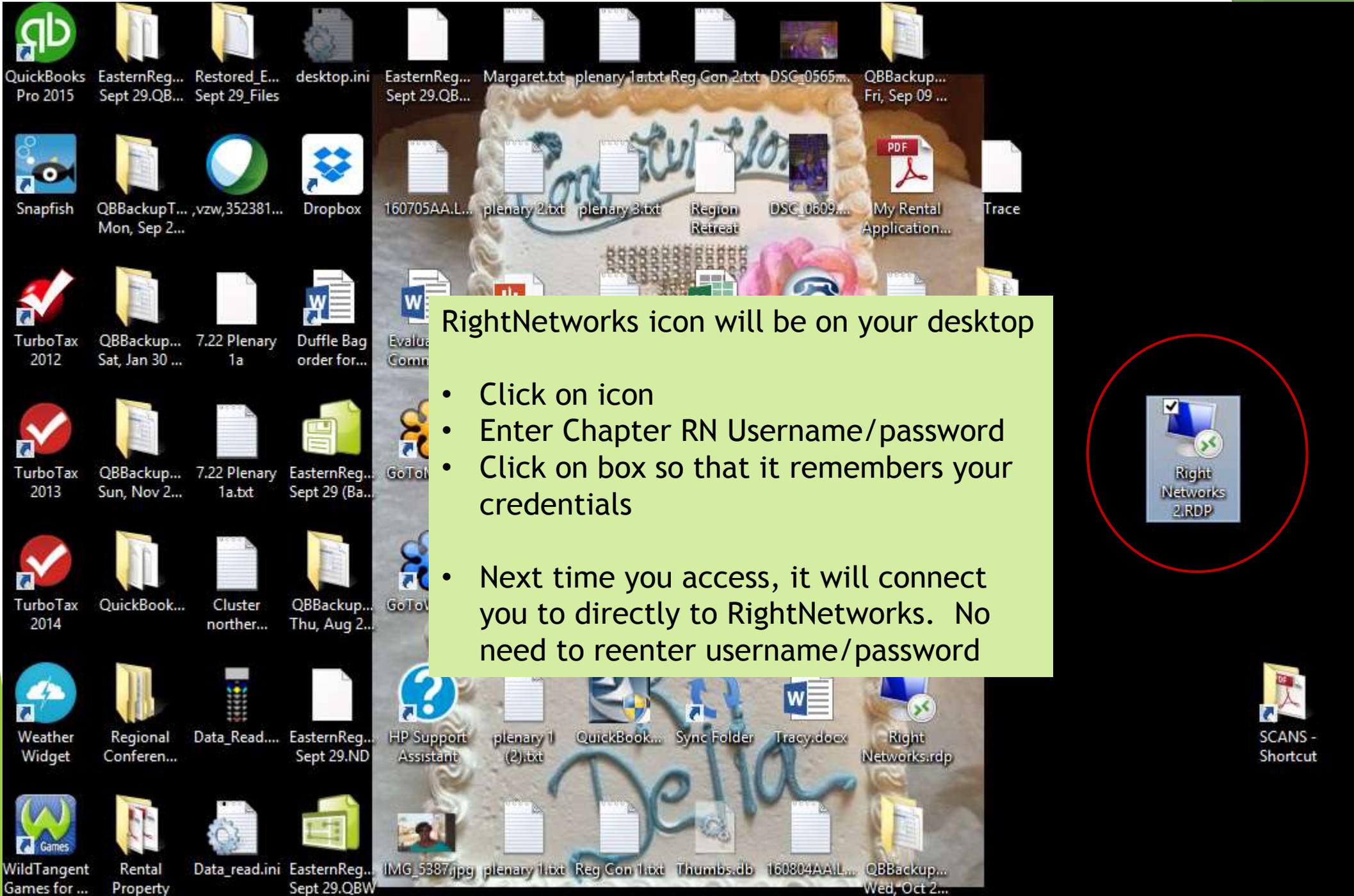


Right Networks® Setup Wizard

Configuring your system...

- Configuring Desktop Shortcut... Done
- Configuring System Settings... Done
- Configuring Printer Support... Done
- Configuring Scanner Support... Done

Your computer is ready to connect to Right Networks.



RightNetworks icon will be on your desktop

- Click on icon
- Enter Chapter RN Username/password
- Click on box so that it remembers your credentials

- Next time you access, it will connect you to directly to RightNetworks. No need to reenter username/password



Blue Screen will indicate the RN desktop

The screenshot shows the QuickBooks Pro 2016 desktop environment. The title bar reads 'Syracuse Chapter of Jack & Jill - QuickBooks Pro 2016'. The menu bar includes 'File', 'Edit', 'View', 'Lists', 'Favorites', 'Company', 'Customers', 'Vendors', 'Employees', 'Banking', 'Reports', 'Window', 'Help', and 'Special Offers'. The 'Reports' menu is open, displaying options such as 'Report Center', 'Memorized Reports', 'Commented Reports', 'Company Snapshot', 'Process Multiple Reports', 'Company & Financial', 'Customers & Receivables', 'Sales', 'Jobs, Time & Mileage', 'Vendors & Payables', 'Employees & Payroll', 'Banking', 'Accountant & Taxes', 'Budgets', 'List', 'Contributed Reports', 'Advanced Reports', 'Custom Reports', 'QuickReport (Ctrl+Q)', 'Transaction History', and 'Transaction Journal'. A central green box with a red border contains the following instructions:

- Click on QB icon
- Enter Username/password
- Select Reports

QB Access:

- Financial Secretary - Accounts Receivable and Reports
- President - Reports only

Treasurer has admin access

The desktop background is blue and features icons for 'Recycle Bin', 'Printers', 'Helpdesk', and 'QuickBooks Pro 2016'. The taskbar at the bottom shows the 'Start' button, the system clock at '8:15 AM 1/19/2017', and a network icon.

Creating Customer/Invoice

The background features abstract, overlapping geometric shapes in various shades of green, ranging from light lime to dark forest green. These shapes are primarily located on the right side of the slide, creating a modern, layered effect. The text 'Creating Customer/Invoice' is positioned on the left side of the slide, centered vertically.

Adding Customers

NS Chapter of Jack & Jill of America Inc. - QuickBooks Pro 2014 (multi-user) (Admin) - [New Customer]

Lists Favorites Company Customers Vendors Employees Banking Reports Window Help

Income Tracker Calendar Snapshots Customers Vendors Employees Bank Feeds Docs Reports QuickBooks 2017 Order Checks Add Payroll Credit Cards Services Feedback

1 CUSTOMER NAME Remember to add "C" after the last name or as the MI

OPENING BALANCE AS OF 12/02/2016 How do I determine the opening balance?

Address Info

COMPANY NAME

FULL NAME Mr./Ms./... First M.I. Last **2**

JOB TITLE

Main Phone Main Email **3**

Work Phone CC Email **4**

Mobile Website

Fax Other 1

ADDRESS DETAILS

INVOICE/BILL TO SHIP TO

Customer is inactive

5 OK Cancel Help

Completed Customer & Hit OK

The screenshot shows the 'Edit Customer' window in QuickBooks Pro 2014. The window title is 'NJ Chapter of Jack & Jill of America Inc. - QuickBooks Pro 2014 - [Edit Customer]'. The customer name is 'Margaret J. Cunningham (C)'. The current balance is 0.00. The 'Address Info' section contains the following fields:

| Field | Value |
|--------------|-------------------------------------|
| COMPANY NAME | |
| FULL NAME | Mrs Margaret J Cunningham |
| JOB TITLE | |
| Main Phone | 973-819-7618 |
| Work Phone | |
| Mobile | |
| Fax | 973-651-0812 |
| Main Email | mj51663@yahoo.com |
| CC Email | vmw.jandj@cloud.com, northjersey... |
| Website | www.margaretj.cunningham.com |
| Other 1 | |

The 'ADDRESS DETAILS' section shows the invoice bill to address: 'Margaret J. Cunningham (C), 43 Highwood Rd, West Orange, NJ 07052'. The ship to address is currently blank. The 'OK' button is circled in red.

Customer is inactive

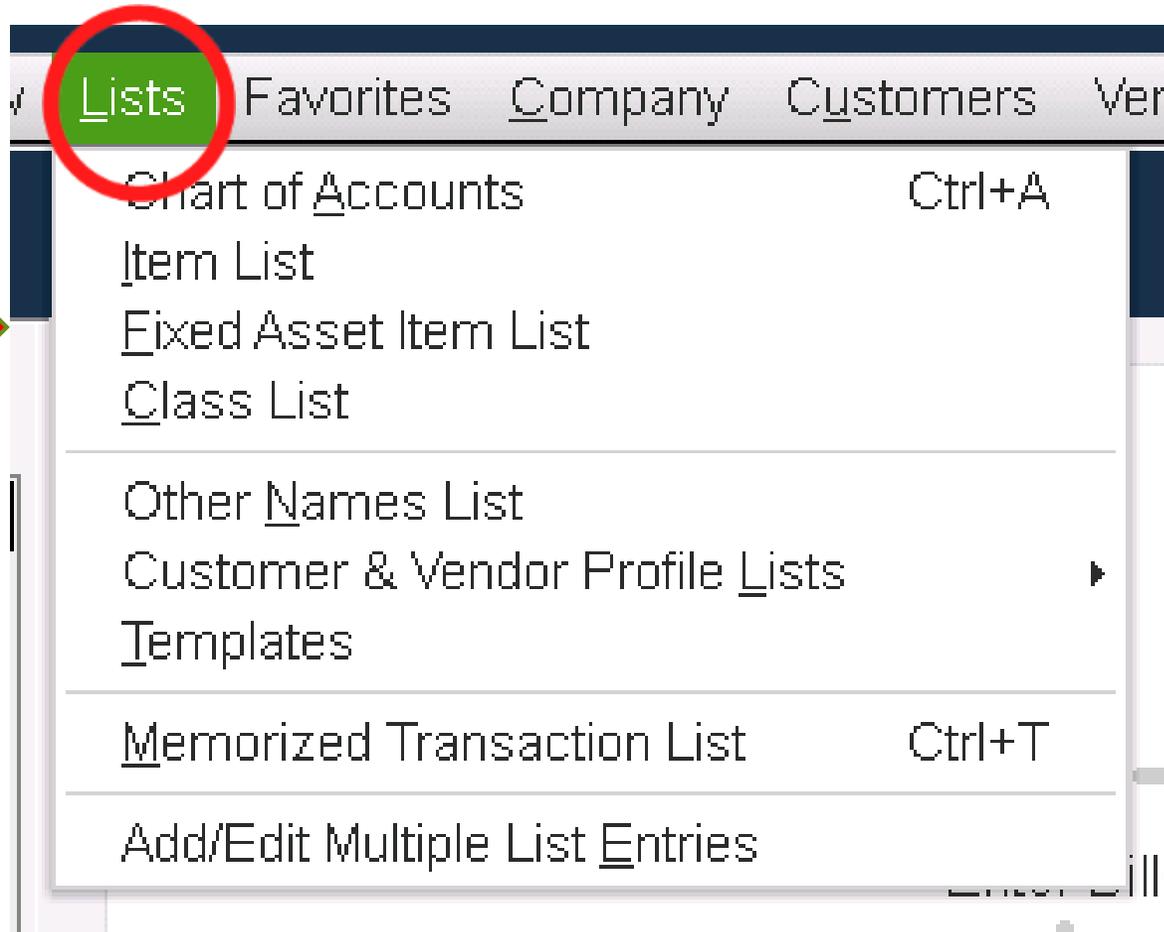
Buttons: OK, Cancel, Help

Customer Center Information

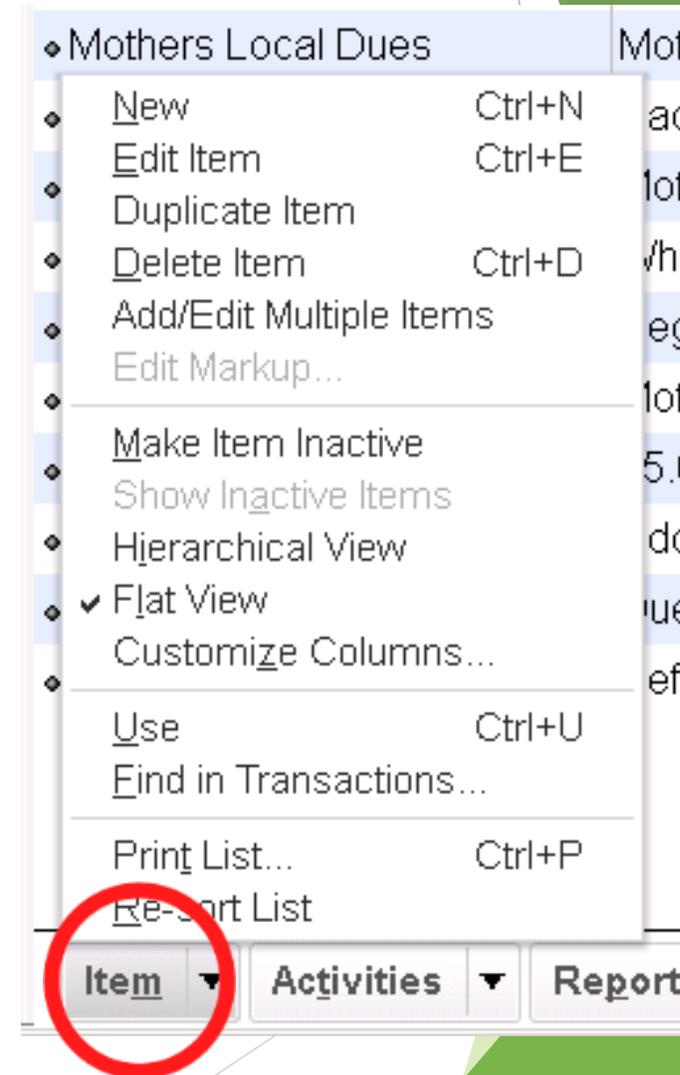
The screenshot shows the QuickBooks Pro 2014 Customer Center interface. A red circle highlights the 'Customers' menu in the top navigation bar. A red arrow labeled '1' points to the 'Active Customers' list on the left. A red arrow labeled '2' points to the 'Margaret J. Cunningham (C)' entry in this list. A red arrow labeled '3' points to the 'Customer Information' section on the right, which displays contact details for Mrs. Margaret J. Cunningham. Below this, a 'Transactions' table is visible, showing a list of financial entries with columns for Type, Num, Date, Account, and Amount.

| TYPE | NUM | DATE | ACCOUNT | AMOUNT |
|---------------|----------|------------|-----------------------|---------|
| Check | 2373 | 11/03/2016 | J&J Operating Account | -90.00 |
| Payment | 3127 | 10/25/2016 | Undeposited Funds | 200.00 |
| Check | 2371 | 10/21/2016 | J&J Operating Account | -720.77 |
| Credit Memo | 2017-105 | 10/11/2016 | Accounts Receivable | -75.00 |
| Check | 2348 | 10/11/2016 | J&J Operating Account | -75.00 |
| Sales Receipt | 35 | 10/04/2016 | Undeposited Funds | 20.00 |
| Invoice | 2017-18 | 09/08/2016 | Accounts Receivable | 300.00 |
| Payment | | 09/08/2016 | Undeposited Funds | 100.00 |
| Payment | | 08/30/2016 | Undeposited Funds | 10.00 |
| Invoice | 2017-16 | 06/14/2016 | Accounts Receivable | 10.00 |
| Invoice | 2017-1 | 06/01/2016 | Accounts Receivable | 539.06 |
| Payment | | 06/01/2016 | Undeposited Funds | 539.06 |

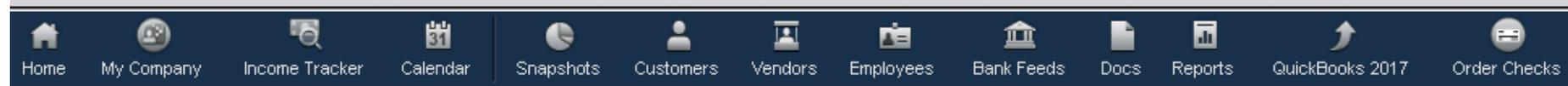
Adding Items



Select Item dropdown at the bottom of the item list



Adding Items



TYPE

1 → Service Use for services you charge for or purchase, like specialized labor, consulting hours, or professional fees.

2 → Item Name/Number Subitem of

COPA

This service is used in assemblies or is performed by a subcontractor or partner

3 → Description Rate 4

Account 5

6 → OK
Cancel
Next
Notes
Custom Fields
Spelling

Item is inactive

Remember to select an INCOME account as this is going on invoices which is linked to INCOME

Create Your Invoice - One Mother Member

1

2

3

4

| ITEM | QUANT... | DESCRIPTION | RATE | AMOUNT |
|------|----------|-------------|------|--------|
| | | | | |
| | | | | |

TOTAL PAYMENTS APPLIED 0.00
BALANCE DUE 0.00

Save & Close Save & New Clear

Applying Payments

Customer Payment

RECEIVED FROM: Marlaina Sims Powell
PAYMENT AMOUNT: 200.00
DATE: 12/02/2016
REFERENCE #:
AR ACCOUNT: 11000 - Accounts Receivable

Where does this payment go?

| DATE | NUMBER | ORIG. AMT | AMT. DUE | PAYMENT |
|------------|----------|-----------|----------|---------|
| 11/01/2016 | 2017-129 | | 300.00 | 200.00 |
| Totals | | | 300.00 | 200.00 |

AMOUNTS FOR SELECTED INVOICES

| | |
|------------------|--------|
| AMOUNT DUE | 200.00 |
| APPLIED | 200.00 |
| DISCOUNT APPLIED | 0.00 |

Save & Close **Save & New** Clear

Select Payments To Deposit (Invoice & Sales Receipts)

The screenshot shows the 'Make Deposits' software interface. A 'Payments to Deposit' dialog box is open, displaying a list of payments. The 'OK' button is circled in red. A text box on the right provides instructions: 'Remember to match the mother's you are checking off with your deposit. You cannot mix your operating account deposits with your fundraising accounts. You can only do one account at a time.'

| DATE | TIME | TYPE | NO | PAYMENT METHOD | NAME | AMOUNT |
|------------|------|------|-------|----------------|---------------------------|--------|
| 10/23/2016 | | RCPT | 57 | | Karan Davidson (C) | 100.00 |
| 09/02/2016 | | PMT | | Cash | Rochelle Peniston(C) | 10.00 |
| 09/22/2016 | | PMT | | Cash | Erica McDay(C) | 14.33 |
| 11/17/2016 | | PMT | | Cash | Valerie Morrison (C) | 100.00 |
| 11/23/2016 | | PMT | | Cash | Alison Scott Williams (C) | 100.00 |
| 11/17/2016 | | PMT | 4145 | Check | Brett Simon(C) | 280.00 |
| 11/17/2016 | | PMT | 41451 | Check | Brett Simon(C) | 100.00 |
| 11/17/2016 | | PMT | 675 | Check | Darlene Winkler(C) | 100.00 |
| 11/17/2016 | | PMT | 3071 | Check | Karna Warren, MD | 100.00 |
| 11/17/2016 | | PMT | 1364 | Check | Ebonee Lewis (C) | 100.00 |
| 11/17/2016 | | PMT | 101 | Check | Robyn Dawson Bryant | 300.00 |
| 11/17/2016 | | PMT | 3304 | Check | Tiffany Dupree-Atwell(C) | 100.00 |
| 11/17/2016 | | PMT | 2058 | Check | Karan Davidson (C) | 300.00 |

0 of 30 payments selected for deposit.

Payments Subtotal: 0.00

Buttons: Select All, Select None, OK, Cancel, Help

To get cash back from this deposit, enter the amount below. Indicate the account where you want this money to go, such as your Petty Cash account.

Cash back goes to: [] Cash back memo: [] Cash back amount: []

Deposit Subtotal: []

Deposit Total: []

Buttons: Save & Close, Save & New, Clear

Confirming Deposit in Check Register

NJ Chapter of Jack & Jill of Ame... J&J Operating Account

File Edit View Lists Favorites Company Customers Vendors Employees Banking Reports Window

Home My Company Income Tracker Calendar Snapshot Customers Vendors Employees Bank Feeds Docs Reports Quickbooks 2017 Order Checks Add Payment Credit Cards Services Feedback

Go to... Print... Edit Transaction QuickReport Setup Bank Feeds

Open Windows
001 J&J Operating
Make Deposits
Home
Receive Payments

| DATE | NUMBER | PAYEE | PAYMENT | DEPOSIT | BALANCE |
|------------|---------|---|---------|---------|-----------|
| 10/03/2016 | 2362 | Tiana Evans (C) | 50.00 | | 48,221.34 |
| | CHK | 11000 - Accounts Receivable | | | |
| | | Voucher27A-17 Refund Sr. Teen T-shirt | | | |
| 10/03/2016 | 2363 | Shell Rice Williams(C) | 80.00 | | 48,141.34 |
| | CHK | 11000 - Accounts Receivable | | | |
| | | Voucher 27-17 Refund Sr. Teen T-shirt fee | | | |
| 10/03/2016 | 2364 | Michelle Stevenson(C) | 40.00 | | 48,101.34 |
| | CHK | 11000 - Accounts Receivable | | | |
| | | Voucher27A-17 Refund Sr. Teen T-shirt | | | |
| 10/03/2016 | 2365 | Kim Walker(C) | 90.00 | | 48,011.34 |
| | CHK | 11000 - Accounts Receivable | | | |
| 10/03/2016 | 2366 | Lynn Biot Gordon | 50.00 | | 47,961.34 |
| | CHK | 11000 - Accounts Receivable | | | |
| | | VOUcher 27A-17 Refund Sr. Teen T-shirts | | | |
| 10/03/2016 | 2367 | Karma Warren, MD | 90.00 | | 47,871.34 |
| | CHK | 11000 - Accounts Receivable | | | |
| | | Voucher27A-17 Refund Sr. Teen T-shirt | | | |
| 10/03/2016 | 2368 | Valerie Morrison (C) | 100.00 | | 47,771.34 |
| | CHK | 11000 - Accounts Receivable | | | |
| | | Voucher27A-17 Refund Sr. Teen T-Shirt | | | |
| 10/03/2016 | 2370 | Pamela Brodie(C) | 85.00 | | 47,686.34 |
| | CHK | 11000 - Accounts Receivable | | | |
| | | VOUcher27A-17 Refund Sr Teen T-shirt | | | |
| 10/03/2016 | | | 480.00 | | 47,206.34 |
| | TRANSFR | 002 - J&J Fundraising Account | | | |
| | | Funds Transfer - Sr Teen Fundraising money went to Operating instead of Fur | | | |
| 10/04/2016 | | | | 100.00 | 47,306.34 |
| | DEP | 952-3 - Fundraiser Graphic Artist | | | |
| | | Deposit | | | |
| 10/11/2016 | 2348 | Margaret J Cunningham | 75.00 | | 47,231.34 |
| | CHK | 11000 - Accounts Receivable | | | |
| | | Voucher 277-17Refund check for sr. teen t-shirt 2016 | | | |
| 10/19/2016 | | | | 310.00 | 47,541.34 |
| | DEP | -split- | | | |
| | | Deposit | | | |

ENDING BALANCE 41,921.21

Record Restore

Sort by Date, Type, Number/Ref

Windows Taskbar: Ask me anything, 4:33 PM 12/8/2016

New Reports

7:13 PM
11/10/16

Eastern Region, Jack and Jill Inc
A/R Aging Summary
As of November 10, 2016

| | Current | 1 - 30 | 31 - 60 | 61 - 90 | > 90 | TOTAL |
|-------------------------|---------------|-------------|-------------|-------------|-------------|---------------|
| Burlington Willingbo... | 224.14 | 0.00 | 0.00 | 0.00 | 0.00 | 224.14 |
| Karen Chaplin- Prot... | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| TOTAL | 224.14 | 0.00 | 0.00 | 0.00 | 0.00 | 224.14 |

Key Points to Remember:

- Invoicing and Deposits are completed by the Financial Secretary
- If the Financial Secretary invoices, she must complete deposits when those invoices are paid
- Utilize item list for common income items that impact multiple members
- Ensure item list identifies Account that will be impacted when income is booked
- Treasurer reports - select 'Cash Basis'

Key To Success? Working Together

Each Role has a key part and **TOGETHER** we make a whole!





Delia Ware - Tibbs
Eastern Regional Treasurer
jjeasternrtdelia@gmail.com