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Working Remotely – What Is It and What Does it Mean to You?
Part 2 in our On-Going Series

Last month we talked about the difference between **remote access** and **file transfers**, and why you might use one service over the other (If you missed that article check our Newsletter Archive).

Transferring files securely is the first step in working remotely with your clients, and many times it helps the client transition to the next level of remote solutions.

So what is the next level?

Once you and your client are comfortable with backing up, transferring, and restoring data files, then you may find that there is work you can perform, or services you can offer, without ever leaving your office. It's a way of making your business more profitable, while serving the needs of your clients effectively.

There are many options available, and it is important to understand the difference between the various programs offered and what they can or cannot do for you and your client.

> *As a basic overview, there are services available, both free and paid, that allow you to take control of your client's computer - as if you were sitting right there in their office. You will be able to see your client's desktop/computer, take control if needed, or watch them work and provide verbal assistance. It opens up a whole new area of support and assistance that your clients will find invaluable.*

There are many things to consider when deciding on which program, or programs, you are going to use. Specifically, you need to find out what your client may already have available, and can you use it?

➢ How do they connect to the Internet: if they only have dial-up available none of the services will work well, however most will work in a pinch.
➢ What can their computer handle: after all, you don't want to suggest a program that will crash their entire system.
➢ You will need to decide if having remote access will be used on an ongoing basis, or only for a special project; there is no need to purchase something if other options are available.
➢ You will also need to address security, ease of use, cost, what programs you want to access, and if unattended access will be required.

For the purpose of this article, we are going to list a few services and provide a brief overview; then we are going to look at what many of us already have available, our QuickBooks!

For those of you that have **Windows XP**, you can set up Remote Assistance free; the caveat is your client also must be running Windows XP and you need to know a bit about computers to set this up correctly. This may require a trip on-site if your client is not comfortable making changes in their system. **NetMeeting** is also available within Windows XP, however many find it more difficult to set-up and use.

Many of you may be familiar with www.pcanywhere.com, www.gotomypc.com, www.radmin.com, www.realvnc.com, and www.webex.com. Some of these are licensed products, while others are subscription based.

To use **PCAnywhere**, you must purchase a license for each machine and install the software; your computer would be set up as the 'Remote' computer and the client computer would be the 'Host' computer. While it is a one-time purchase (with the exception of upgrades when necessary), it requires that each client purchase and install a copy of the software. If your client already has it, then it may be a viable option.

Radmin is also a program that you purchase as a license, and is quite affordable at $35. **RealVNC** is also a licensed based program and runs approximately $30 per license. While they are affordable, it is important to remember that it must be installed on your machine as well as your client's machine.

In the last year or two, www.gotomypc.com has become quite popular. It is basically a web-based version of PCAnywhere; it can be downloaded and installed quickly, is easy to use, and many clients already have it or are familiar with it. There is a monthly subscription fee for this service, but it is reliable, they have good customer support, and it offers a lot of great features. I have noticed that it has a very good 'reaction time' when you are connected; you can access all the programs on the client's computer, transfer files, print remotely or locally, and can easily add multiple computers to the account. Gotomypc can also be set-up easily for unattended remote access and is quite secure.

Most of you already have a great tool at your disposal, yet many do not realize it. If you have **QuickBooks Premier, Enterprise, or one of the Industry Specific versions** (2004 or higher) then as part of your software you have 1 year of free **Remote Access** included! All you have to do to activate your account is sign up with your e-mail and create a password. If you have two computers in your office, experiment with setting them up and see how it works first-hand, without any additional cost.

With the free version, you can send an 'invitation to a remote support session' to your client via e-mail; they will click on the link provided, run the installation if this is the first time you have done this with them (which takes approximately 2 minutes), and you will be able to request desktop control. Once desktop control has been granted, you will be able to see their computer desktop, just as if you were sitting beside them; you can watch them move around the file and by using the mouse they can transfer control and watch you navigate around.
TIP: Before they install the software, ask them to disable their pop-up blockers, ask what type of firewall and anti-virus software they use, and if they are using Mozilla as their browser. If they are using Mozilla, it is best to have them copy the link and paste it into Internet Explorer, as Mozilla tends to block the service from working. Many times, if they hold the Control key down when they click on the link, it will bypass pop-up blockers that they do not realize is running on their computer.

There are many times that we know if we could just 'touch' a clients QuickBooks file for five minutes we could solve their problem; much easier than trying to explain to them where to click, driving to their office, or sending back-ups. You not only have access to their QuickBooks, you can also access other programs on their computer, all in the comfort of your office.

You can upgrade the service to Gold (14.95/month) or Platinum ($29.95/month) and enjoy the features listed above and the many additional features that are offered. The service is powered by WebEx and is quite secure and easy to use for both you and your client. You can access the service from your Accountant's drop-down menu or your Company Navigator easily, or visit

http://quickbooks.intuit.com/commerce/catalog/product.jhtml?priorityCode=0273400000&prodId=prod00 00000000007975030 for more comprehensive details and FAQ's.

With the upgrade options, you have the ability to set-up unattended access, transfer files, and print from the remote computer to your location. If you are subscribed to the Platinum Plan, you can also record and playback sessions to be used for training or archiving, personalize the client sessions with video, and set permissions. For unattended remote access, the client computer must be on and connected to the Internet, which is also true for any of the programs we have discussed.

Using any of the remote access programs that we have discussed will open up a whole new client base for your business, and allow you to perform services that would otherwise be impossible. Many of us use several services, based on the needs of the client.

If you are new to the idea of connecting remotely to your client's computer, set it up in-house and test it out, play around with it until you are comfortable. You won't regret it.

Next month we will discuss the next step in *Working Remotely,* using the service of an ASP (Application Service Provider).

Be sure to check out the article Andrew Muollo from Legrand CRM has contributed this month, he talks about first impressions and using your website effectively. One of the nice features you can add to your website is an easy connection to a remote support session!

See you next month,
Rox ☺