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Customer Support

Knowledgeable Customer Support Representatives are ready to assist you with your system and navigation questions, six days a week. Contact us Monday - Friday, 5:30 am - 5:00 pm (PST) and Saturday, 6:00 am - 2:30 pm (PST). Call 800-859-3282 or email us at support@alldata.com.

Live Product Training

Live, interactive product training for you and your employees is available in the ALLDATA Training Department’s virtual classroom. Qualified professionals will train you to effectively use ALLDATA RepairSM, ALLDATA ManageSM and ALLDATA MarketSM.

Learn how to take advantage of every feature with online training from ALLDATA, and start getting a quick return on your investment in all your ALLDATA products. To schedule your training, contact the Training Department directly at 800-684-6840 or 800-829-8727, ext. 4416.
**IMPORTANT**

If you are a first time installer of ALLDATA Manage, please read the information below.

**Before you begin – confirm the following:**
- Make sure the latest version of ALLDATA RepairSM is installed
- iSHOP® server has been configured
- Fill out the required fields in the ALLDATA® Manage SM pre-install workbook. (This will help you properly install and configure ALLDATA® Manage.)
- Make sure all ALLDATA Manage PCs meet all minimum requirements for operating system, service packs and hardware.

You will need to determine if you are going to install and use ALLDATA Manage on one computer or install and use ALLDATA Manage on a network. Please read the following carefully to make your determination.

- **PC Standalone** – select if this is the ONLY computer using ALLDATA Manage.
- **Network Server** – select if you are running ALLDATA Manage on a network and this is the computer where ALLDATA Manage data will be stored.
- **Network Client** – select if you are running ALLDATA Manage on a network and this is not the server computer. (NOTE: Client installs do not contain their own data. Data is accessed from the server on your shop network.)

To access the help files and videos you will need an Internet connection.

**Obtaining Computer Name:**
If you are installing as a Network Client, you may need the name of the computer that will be the server for ALLDATA Manage. Please see the section, “Obtaining Computer Name,” which is located under the ALLDATA Manage Setup dropdown menu at Setup > Installation and Setup > Obtaining Computer Operating System (OS) Name.

**Upgrading from a version older than 4.6**

If you are upgrading from a version of ServiceCenter* older than 4.6, please call Customer Support at 800.859.3282.

*ALLDATA Manage was previously named ServiceCenter.

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**Manual Start Instructions**

**Use only if Installation does not start automatically**

Insert the ALLDATA Manage disc into your DVD drive. If the ALLDATA Manage install screen DOES NOT automatically display after 10-20 seconds:

1. From the **Start** menu, select **Run**.

2. From the **Run** window, select the **Browse** button.

3. Navigate to the DVD drive where the ALLDATA Manage Software Installation Disc is located, highlight **Setup.exe** and select **Open**.

4. From the **Run** window, select **OK** and proceed with installation.
Stand-Alone PC Installation (New Installation)

Make sure the latest version of ALLDATA® Repair® has been installed and the iSHOP® server has been configured. If these conditions are not met, you will receive an error message and the installation will be terminated.

If you are using ALLDATA Manage on only one computer, follow this procedure.

1. Save changes to all open files and close all programs running on your computer.

2. Insert the ALLDATA Manage disc into your DVD drive. After a few seconds, an ALLDATA Manage window displays. (If this window does not display after 20 to 30 seconds, see the Manual Start Instructions.)

   **NOTE:** If the AutoPlay screen is displayed click Run setup.exe. If the User Account Control screen is displayed click Yes.

3. At the "ALLDATA Manage InstallShield Wizard" window, click Install.

   The list will contain Microsoft updates required for ALLDATA Manage 4.9. The updates required will depend on the updates already applied to your PC.

   If the Reboot screen is displayed click Yes.

   **NOTE:** Each time the Reboot screen is displayed, click Yes.

4. Read or print the Terms and Conditions, check "I Accept" and click Next to accept the Terms and Conditions. If you do not agree to the Terms and Conditions, you cannot install ALLDATA Manage.

5. Select and highlight the "Standalone PC" setup type, then click Next.

6. Click Next to accept the default file location or use the Browse button to select a different location.

7. Click Install and wait while ALLDATA Manage and Microsoft SQL Express are being installed.

   **NOTE:** If the Windows Firewall message displays at this point of the installation, click Yes to continue.

   **NOTE:** Do not click the ALLDATA Manage icon on your desk top until the installation is complete.

8. Click Finish when the "InstallShield Wizard Complete" window displays. It is now safe to remove the disc.

   **NOTE:** An ALLDATA Manage Setup Tutorial Video will launch when you click Finish.
Network Server Installation (New Installation)

Make sure the latest version of ALLDATA® RepairSM has been installed and the iSHOP® server has been configured. If these conditions are not met, your ALLDATA Manage and Microsoft SQL Express are being installed.

If you are using ALLDATA Manage on two or more networked computers, follow this procedure on your server computer (this is the computer where all your data will be stored). After completing the Server installation, use the “Network Client Installation” procedure to install on the other (client) computers.

1. Save changes to all open files and close all programs running on your server computer.

2. Insert the ALLDATA Manage disc into the server’s DVD drive. After a few seconds, an ALLDATA Manage window displays. (If this window does not display after 20 to 30 seconds, see the Manual Start Instructions.)

   **NOTE:** If the AutoPlay screen is displayed, click Run setup.exe. If the User Account Control screen is displayed, click Yes.

3. At the “ALLDATA Manage InstallShield” window, click Install.

   The list will contain Microsoft updates required for ALLDATA Manage. The updates required will depend on the updates already applied to your PC.

   If the Reboot screen is displayed, click Yes.

   **NOTE:** Each time the Reboot screen is displayed, click Yes.

   After the reboot click Install. The number of times the Reboot screen will appear will depend on the number of updates that are required for your PC.

   Select Next to continue the Installation.

4. Read or print the Terms and Conditions, check “I Accept” and click Next to accept the Terms and Conditions. If you do not agree to the Terms and Conditions, you cannot install ALLDATA Manage.

5. Select and highlight the “Network Server” setup type, then click Next.

6. Click Next to accept the default file location or use the Browse button to select a different location.

   If you are running Windows® XP and your firewall is ON, you will receive a message to allow ALLDATA Manage Setup to create or modify your exceptions in your Windows firewall.

   Click Yes to continue.

   **IMPORTANT:** If you click NO, your ALLDATA Manage Server and Client will NOT be able to communicate through your Windows firewall correctly. To configure your Windows firewall exceptions after the ALLDATA Manage installation has completed, re-insert your installation disc and run the firewall option.

   **Note:** Do not click the ALLDATA Manage icon on your desktop until the installation is complete.

   Click Install and wait while ALLDATA Manage and Microsoft SQL Express are being installed.

7. Click Finish when the “InstallShield Wizard Complete” window is displayed. It is now safe to remove the disc.

   **NOTE:** An ALLDATA Manage Setup Tutorial Video will launch when you click Finish.
Network Client Installation (New Installation)

1. Save changes to all open files and close all programs running on your computer.

2. Insert the ALLDATA Manage disc into the client’s DVD drive. After a few seconds, an ALLDATA Manage window displays. (If this window does not display after 20-30 seconds, see the Manual Start Instructions.)

NOTE:
If the AutoPlay screen is displayed, click Run setup.exe.
If the User Account Control screen is displayed, click Yes.

3. At the “ALLDATA Manage InstallShield” window, click Install.

The list will contain Microsoft updates required for ALLDATA Manage. The updates required will depend on the updates already applied to your PC.

If the Reboot screen is displayed, click Yes.

NOTE:
Each time the Reboot screen displays, click Yes.

After the reboot click Install.
The number of times the Reboot screen will appear will depend on the number of updates that are required for your PC.

Select Next to continue the Installation.

4. Read or print the Terms and Conditions, check “I Accept” and click Next to accept the Terms and Conditions. If you do not agree to the Terms and Conditions, you cannot install ALLDATA Manage.

5. Select and highlight the “Network Client” setup type, then click Next. The application will automatically search for your network.

6. If the application is unable to connect with a database server, an error message will be displayed and the installation will terminate.

7. Select the server name from the drop-down menu, then click Next.

8. Click Next to accept the default file location, or use the Browse button to select a different location.

9. Wait while ALLDATA Manage is installed.

   Note: Do not click the ALLDATA Manage icon on your desktop until the installation is complete.

10. Click Finish when the ‘InstallShield Wizard Complete’ window is displayed. It is now safe to remove the install disc.
Stand Alone PC Installation (Update from a previous version)

Make sure the latest version of ALLDATA® RepairSM has been installed and the iSHOP® server has been configured.

If these conditions are not met, you will receive an error message and the installation will be terminated.

If you are using ALLDATA Manage on only one computer, follow this procedure.

1. Save changes to all open files and close all programs running on your computer.

2. Insert the ALLDATA Manage disc into the client’s DVD drive. After a few seconds, an ALLDATA Manage window displays. (If this window does not display after 20-30 seconds, see the Manual Start Instructions.)

   **NOTE:**
   If the AutoPlay screen is displayed, click Run setup.exe.
   If the User Account Control screen is displayed, click Yes.

3. At the “ALLDATA Manage InstallShield” window, click Install.

   The list will contain Microsoft updates required for ALLDATA Manage. The updates required will depend on the updates already applied to your PC.

   If the Reboot screen is displayed, click Yes.

   After the reboot, click Install.

   **NOTE:**
   Each time the Reboot screen displays, click Yes.

   The number of times the Reboot screen will appear will depend on the number of updates that are required for your PC.

4. At the ALLDATA Manage Update window, click Next.

5. Read or print the Terms and Conditions, check “I Accept” and click Next to accept the Terms and Conditions. If you do not agree to the Terms and Conditions, you cannot install ALLDATA Manage.

6. Click Install and wait while ALLDATA Manage and Microsoft SQL Express are installed.

   **Note:** Do not click the ALLDATA Manage icon on your desktop until the installation is complete.

7. Click Finish when the “InstallShield Wizard Complete” window is displayed. It is now safe to remove the disc.
Network Server Installation (Update from a previous version)

Make sure the latest version of ALLDATA® RepairSM has been installed and the iSHOP® server has been configured. If these conditions are not met, you will receive an error message and the installation will be terminated.

If you are using ALLDATA Manage on two or more networked computers, follow this procedure on your server computer (this is the computer where all your data is stored). After updating the server, follow the procedure for installing on (client) computers.

1. Save changes to all open files and close all programs running on your computer.

2. Insert the ALLDATA Manage disc into the client's DVD drive. After a few seconds, an ALLDATA Manage window displays. (If this window does not display after 20-30 seconds, see the Manual Start Instructions.)

   **NOTE:**
   - If the AutoPlay screen is displayed, click Run setup.exe.
   - If the User Account Control screen is displayed, click Yes.
   - At the “ALLDATA Manage InstallShield” window, click Install.

   The list will contain Microsoft updates required for ALLDATA Manage. The updates required will depend on the updates already applied to your PC.

   If the Reboot screen is displayed, click Yes. After the reboot, click Install.

   **NOTE:**
   - Each time the Reboot screen displays, click Yes.

   The number of times the Reboot screen will appear will depend on the number of updates that are required for your PC.

3. At the ALLDATA Manage Update window, click Next.

4. Read or print the Terms and Conditions, check "I Accept" and click Next to accept the Terms and Conditions. If you do not agree to the Terms and Conditions, you cannot install ALLDATA Manage.

5. Click Install and wait while ALLDATA Manage and Microsoft SQL Express are installed. **Note:** Do not click the ALLDATA Manage icon on your desktop until the installation is complete.

6. Click Finish when the "InstallShield Wizard Complete" window is displayed. It is now safe to remove the disc.
The ALLDATA Manage Setup Wizard pop-up window will appear the first time the program starts. Click OK to begin Setup.

You are now in the ALLDATA Manage Setup Wizard. This wizard helps you enter your company information, tax rates, employees and a default labor rate. Information you do not currently have available can be entered or changed after you have begun using ALLDATA Manage.

You're now ready to use the Setup Wizard to create the ALLDATA Manage setup for your shop. Click Next to begin.

**Important Notice Regarding ALLDATA Manage Setup:**

It is the responsibility of the shop owner and his/her attorneys and accountants to ensure that the customer complies with all federal, state and local laws, rules and ordinances and to verify that all data is accurate.

AutoZone and ALLDATA take no responsibility for complying with such laws, rules and ordinances or verifying data accuracy.

Consult appropriate legal and financial counsel for the business management procedures for your particular location.
Setting up ALLDATA® Manage

SET UP ALLDATA Manage — Tax Rate

Fill in the blanks.

Parts %: Type the parts tax rate for your area (e.g., type 7 for 7.0%).

Labor %: If labor is taxed in your area, you can enter your labor tax rate percentage here (e.g., type 7 for 7.0%). Skip this section if no labor taxes apply.

Click to continue.

SET UP ALLDATA Manage — Markups

After the Install and Setup wizards are complete, the Markups for All Catalogs can be entered.

Click Setup > Company Setup > Tax/Markups option.

The Tax/Markup tab screen displays and allows the user to set the Sublet % markups and Labor Guide % markups. Click the Price Matrix Setup button to allow the user to select the appropriate Catalog from the dropdown and enter markup information.

Click to continue.

SET UP ALLDATA Manage — Minimum Profit Margin

Available in ALLDATA Manage ELITE only.

A Profit Margin allows you to check the difference between the cost and selling price of parts and services on orders, jobs and line items. In the Profit Margin area, enter a Minimum Order Profit Margin percent to use in analyzing the profit margins on orders as jobs are added (e.g., if you do not want to go lower than 35% profit on any order, job or line item, you would enter 35).

Click to continue.

SET UP ALLDATA Manage — Shop Supply Charges

You will need to decide whether you will use shop supply charges and if the charges will be calculated on a flat or percentage basis. Follow the steps below.

**NOTE:** The fee can be removed from individual repair orders, estimates and counter sales.

To charge a flat shop supply fee:

1. From the shop supply charges drop-down list under Type, select Parts & Labor, Parts Only or Labor Only.
2. Parts Only – fee only applies when parts are billed.
3. Labor Only – fee only applies when labor, sublet or miscellaneous charges are billed.
4. Parts & Labor – fee applies when parts, labor, sublet or miscellaneous charges are billed.

To charge a percentage shop supply fee:

1. From the shop supply charges drop-down list under Type, select Parts & Labor, Parts Only or Labor Only.
2. Type the percentage amount (e.g., 7.5 for 7.5%).
3. Click the percentage sign (%) after your selection.
4. Type a Maximum Charge (in $). If you leave this box at zero, the application will assume there is no maximum charge.
5. If the shop supply fee is taxable, click the Apply Tax check box.

**NOTE:** Maximum-charge dollar amounts cannot be entered because this is a flat fee.

If the Shop Supply fee is taxable, click the Apply Tax check box. Shop Supplies are taxed using the Parts Rate. If your Parts Tax Rate is set at zero, the Apply Shop Supply Tax field is disabled. (To add tax rates, tab back to the Tax Rate section in your program and refer to the Tax Rate Setup Section.)

**NOTE:** If no parts tax rate was entered (see the Tax Rate Setup Section), this box will be disabled.

Click to continue.
The "Hazmat" section is used to set up a Hazardous Materials fee that is automatically added to all estimates, repair orders and counter sales. The charge is either a flat fee or a percentage of the parts and labor charges. You will need to decide whether you will use Hazmat Charges, and if the charges will be calculated on a flat or percentage basis.

The Hazmat fee can be removed from individual repair orders, estimates and counter sales.

To charge a flat Hazmat fee:

1. From the Hazmat Charges drop-down list under Type, select Parts & Labor, Parts Only or Labor Only.
   - Parts Only – fee only applies when parts are billed.
   - Labor Only – fee only applies when labor, sublet or miscellaneous charges are billed.
   - Parts & Labor – fee applies when parts, labor, sublet or miscellaneous charges are billed.
2. Enter the fee amount.
3. Select the dollar sign ($) after your selection.
4. If the Hazmat fee is taxable, click the Apply Tax check box. Hazmat is a materials disposal fee, so it is taxed using the Labor Rate. If your Labor Tax Rate is set at zero, the Apply Hazmat Tax field is disabled. (To add tax rates, tab back to the Tax Rate section in your program and refer to the Tax Rate Setup Section.)

To charge a percentage Hazmat fee:

1. From the Hazmat Charges drop-down list under Type, select Parts & Labor, Parts Only or Labor Only.
   - Parts Only – fee only applies when parts are billed.
   - Labor Only – fee only applies when labor, sublet or miscellaneous charges are billed.
   - Parts & Labor – fee applies when parts, labor, sublet or miscellaneous charges are billed.
2. Enter the percentage amount.
3. Select the percentage sign (%) after your selection.
4. Type a Maximum Charge (in dollars). If you leave this box at zero, the application will assume there is no maximum charge.

If the Hazmat fee is taxable, click the Apply Tax check box. Hazmat is a materials disposal fee, so it is taxed using the Labor Rate. If your Labor Tax Rate is set at zero, the Apply Hazmat Tax field is disabled. (To add tax rates, tab back to the Tax Rate section in your program and refer to the Tax Rate Setup Section.)

Click to continue.

This area is used to enter text for shop-specific messages at the top (Header) and/or bottom (Footer) of estimates, repair orders and counter sales.

1. Header: Enter your message (no more than 100 characters) in the space provided, exactly as you want it to appear at the top of the order. (e.g., “Bob’s Garage Aims to Please.”)
2. Footer: Enter your message (no more than 100 characters) in the space provided, exactly as you want it to appear at the bottom of the order. (e.g., “Friendly neighborhood garage since 1974.”)

Printed Labor Format: Gives you control over the amount of detail that prints on your order.

Show Rate & Time: Selecting this button will print the hourly labor rate ($), the hours charged (#) and total charge ($). (e.g., Labor Rate $50. Hours Charged 3. Total Charge $150.)

Show Total (Calculated from Rate & Time): Selecting this button will print only the total charge ($) calculated from the rate and time. (e.g., Total Charge $150.)

Print on Pre-printed Forms: Check this box only if you are using pre-printed forms. Forms are available at www.autosystemsupplies.com.

Click to continue.
This section enables you to select your initial number sequence for your repair orders and estimates.

**IMPORTANT:** Numbering of each should be significantly different to easily distinguish your estimates from your repair orders.

**NOTE:** Once a sequence is activated, you cannot reset to a lower number. It can only be reset to a higher number.

**Suggestion:** You may want to continue using same numbering sequence you are currently using.

**Starting RO #:** Enter the number that you want your repair orders to begin with (up to 9 digits).

**Starting Estimate #:** Enter the number you want your estimates to begin with (up to 9 digits).

**Starting PO #:** Enter the number you want your purchase orders to begin with (up to 9 digits).

Click **Next** to continue.

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To track labor profits and employees on estimates, repair orders and counter sales, you must add each employee name to the system.

You must enter at least one employee to continue the set up.

**To add an employee:**

1. Click the **Add Employee** button. A **New Employee** dialog box is displayed.
2. Type **Employee ID**. You can identify your employees using letters, numbers or both. **This is a required field.**
3. Type an **Employee Name**. **This is a required field.**
4. Type **Title**.
5. Type phone **Extension**.

**To add a Labor Rate:**

1. Click the **Add Labor Rate** button. A **New Labor Rate** dialog box is displayed.
2. Type a **Labor Rate Code**. Choose how you want to identify your labor rates using letters, numbers or both. **This is a required field.**
3. Type a labor rate in the **Rate** field. *(e.g., 65 for $65 per hour.)*
4. Type a **Description**. *(e.g., Diagnosis, General Repair, etc.)*
5. Click the **Default Rate** check box if you want this rate to be your default labor rate. One labor rate must be selected as the default rate.
6. Click the **Save** button.
7. Repeat this process for each additional rate. **NOTE:** There can be only one default rate selected.

When you have completed entering your Labor Rates, click **Finish**.
Using ALLDATA® Manage™

SET UP ALLDATA Manage — Catalog SET UP

Setup the ability to access electronic ordering from multiple catalogs. Enter the credentials provided by your catalog supplier in the fields provided.

Click [Select] to continue.

NOTE: Accurately entering your parts supplier credentials will allow you to electronically order parts through ALLDATA Manage. By establishing your credentials, the catalog vendor will automatically display in the Catalog Viewer.

ALLDATA Manage SET UP — COMPLETED!

This completes the Setup Wizard portion of your ALLDATA Manage installation.

IMPORTANT! Make sure the latest version of ALLDATA® Repair™ has been installed and launched before starting ALLDATA Manage, otherwise an error message will occur.

Click the OK button to launch ALLDATA Manage. You will be greeted with the AutoAdmin status report at the start of ALLDATA Manage.

The AutoAdmin status window displays backup and export tasks completed since ALLDATA Manage was shut down, and whether or not those tasks were successful. Click OK to move past the AutoAdmin status report.

NOTE: It is possible to disable the AutoAdmin status report displaying upon launch. Refer to "Setting Setup Information" in the ALLDATA Manage Quick Reference Guide. From the ALLDATA Manage toolbar, go to: ALLDATA Manage Help > Quick Reference Guide.

To access the help files and videos you will need an Internet connection.

ALLDATA Manage Menu Options at a Glance

Use the Main menu options for your daily work, such as creating repair orders and counter sales, adding customers and vehicles and managing your work in progress.

- **Work in Progress, Saved Estimates**
  - Click this button to view current work in progress, including counter sales, invoices, repair orders, estimates and cashiered invoices.

- **New Estimate or Repair Order**
  - Click the New Estimate or Repair Order button to open a new, blank order form and create repair orders and estimates.

- **Customers**
  - Click the Customers button to view, search, add or edit customer information.

- **Customer Follow-up**
  - Click the Customer Follow-up button to send follow-up letters to your customers.

- **Shop Jobs**
  - Click the Shop Jobs button to add, edit or delete a shop job. These shop jobs are available to add to estimates and repair orders.

- **Vehicles**
  - Click the Vehicles button to view or edit vehicles.

- **Service History**
  - Click the Service History button to search service history by customer name, order number, license plate or VIN.

- **New Counter Sale**
  - Click the New Counter Sale button to open a new, blank counter sale form.

The Scheduling shortcut bar gives access to the scheduling Appointments Calendar and Appointments List.

- **Appointments Calendar**
  - The Appointments Calendar allows you to view your shop’s appointments in a calendar format by month or week.

- **Appointments List**
  - The Appointments List window lists all appointments created in ALLDATA Manage or imported from the web.
The **Inventory** shortcut bar allows you to create and manage purchase orders, vendors and parts.

The **ALLDATA** shortcut bar gives access to the ALLDATA library of repair information.

**Additional Information on ALLDATA Manage is available at these locations:**

- ALLDATA Manage Toolbar > Setup > Installation and Setup
- ALLDATA Manage Toolbar > Help > Quick Reference Guide
- ALLDATA Manage Toolbar > Tips

To access the help files and videos you will need an Internet connection.
**Profit Margin Analysis** – To utilize the profit margin analysis you must select a technician on each work order, then complete actual cost and flagged hours. This may help maximize your profit margin. This analysis information is displayed here as a graph with order details on the side.

When a job is added to an order, ALLDATA Manage tests profit margins against the configured Minimum Profit Margin Threshold and displays a Profit Margin indicator in the status bar at the bottom of the order window.

- The indicator is **GREEN** if the Profit Margin threshold was met,
- and **RED** if the Profit Margin threshold was not met.

In the Setup Wizard or under the Tax/Markups section of ALLDATA Manage, you can add your Minimum Order Profit Margin Percentage. This will reflect if your Profit Margin has been met.

**Inventory Management, Vendors and Purchase Orders** – Inventory gives you the ability to enter a parts list with **Qty On Hand**, along with vendors that supply your parts. You can create purchase orders to assist with ordering and restocking parts for your inventory. Each purchase order can be created for each vendor.

**Data Validation** – The Data Validation screen allows you to set up rules for advanced data entry. You can change the Data Validation status for each order state including quotes, estimates, repair orders, invoices or all. You can change the status to be a warning, required or not required field.
Available in ALLDATA Manage ELITE only.

Customer Follow-up — Lets shops create personalized letters, service reminders and address labels using Microsoft Word. Shops subscribing to ALLDATA® MarketSM can also choose to send letters directly to their customers email address. Professional communications will impress consumers.

ALLDATA Manage and QuickBooks®

Available in ALLDATA Manage ELITE only.

To access the help files and videos you will need an Internet connection.

For information on integrating ALLDATA Manage with QuickBooks, please refer to:

Start > Programs > ALLDATA > ALLDATA Manage > Documentation > Reference Documents > QuickBooks

Or from the ALLDATA Manage toolbar, select Setup > Installation and Setup > Quickbooks