

ICAT Installation Options

ICAT installs in the same location where your QuickBooks software is installed.

You can find an overview of ICAT installation instructions for the most common QuickBooks Desktop setup scenarios:

1. On an individual computer
2. On a shared server where multiple users access the same QuickBooks file
3. In a cloud hosted environment

Your ICAT license is valid for unlimited users. Any user with credentials to access QuickBooks can use ICAT. Each organization is responsible for controlling access to and use of their ICAT software.

Your license period begins upon activation.

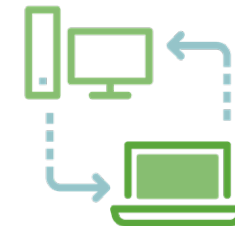
Who on your team will need to access ICAT with QuickBooks?

1



Computer

2



Shared Server

3



Cloud Hosted

ICAT Installation: QuickBooks installed on an individual computer

If you have an individual QuickBooks user, where QuickBooks is installed locally on the desktop or laptop, you will need to install ICAT on that same machine.

1. Download ICAT at ICATSystems.com/download
2. Launch the ICAT software installer and follow the prompts to install the software
3. Launch QuickBooks and sign in as an admin user
4. Launch the ICAT software
5. Authorize the ICAT connection to QuickBooks
6. Enter your Activation Key in the ICAT Product Activation screen

After authorizing and activating ICAT, you do not need to sign in as an admin user. Just launch QuickBooks, then launch ICAT to use the software.



Additional Resources

[View the ICAT installation instructions >](#)

Tip:

When an ICAT update is available, download and install the update on each machine where ICAT is installed.

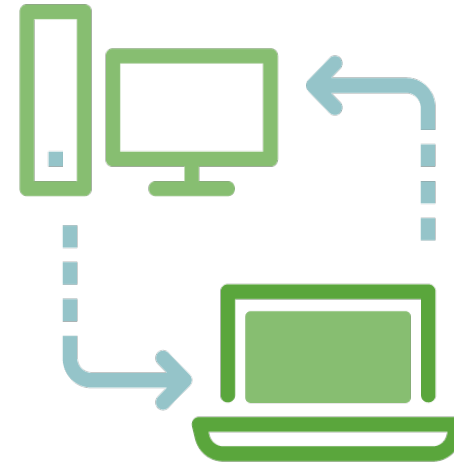
ICAT Installation: QuickBooks installed on a shared server

If multiple users access the same QuickBooks file on a shared server, you will need to install the ICAT software on each user's computer. You do not need to (but you may) install ICAT on the server.

When you launch ICAT for the first time, a shared rate model configuration file will be created in the QuickBooks file location on the server. All ICAT users will access this shared configuration file. If budget files are created, they will also be saved to this location on the server.

1. Download ICAT at ICATSystems.com/download
2. Launch the ICAT software installer and follow the prompts to install the software
3. Launch QuickBooks and sign in as an admin user
4. Launch the ICAT software
5. Authorize the ICAT connection to QuickBooks
6. Enter your Activation Key in the ICAT Product Activation screen
7. Repeat steps 1 and 2 on each additional user's computer

After your company file has been activated with ICAT, you should not need to re-authorize ICAT or re-enter the license key for additional users.



? Additional Resources

[View the ICAT installation instructions >](#)

Tip:

When an ICAT update is available, download and install the update on each machine where ICAT is installed.

ICAT Installation: QuickBooks in a hosted environment

If you have QuickBooks hosted in the cloud (e.g. with RightNetworks or Swizznet), ask your hosting provider to provision ICAT in your remote environment for any QuickBooks users who should have access to ICAT.

When the software is available:

1. Launch your QuickBooks company file and sign in as an admin user
2. Launch the ICAT software
3. Authorize the ICAT connection to QuickBooks
4. Enter your Activation Key in the ICAT Product Activation screen

After your company file has been activated with ICAT, you should not need to re-authorize ICAT or re-enter the license key for additional users. Just launch QuickBooks, then launch ICAT to use the software.



? Additional Resources

[View the ICAT installation instructions >](#)

Tip:

If ICAT is in a hosted environment, when an ICAT update is available your hosting provider will manage updates for you.