

Before you Sync between QB and FSM

Please review this list of potential clean-up areas prior to your initial synchronization between QuickBooks and Intuit Field Service Management (FSM).

1. Look in QB and determine if you are using more than one type of customer in QB.
FSM supports two types of customers: Residential or Commercial. Commercial customers in FSM have a field for “Company”, while Residential customers do not. If this is important to you for reporting purposes or customer record appearance you will want to go through your customers in QB to ensure the customer type is set to something you can map to either residential or commercial. In most cases this is not something that FSM customers have needed to do, but you cannot correct the customer type after they have been created/imported into FSM.
2. Sync errors: QB customers will not sync to FSM if there is an invalid entry in the billing/ship to addresses or the email field. If you are using these fields in QB for something other than the appropriate information the customer will not sync until you fix the customer record. Usually this is corrected after the initial sync since FSM will give you a list of exact records that were not able to sync and why. However, if you are planning to review your customer list prior to sync it would be a good idea to correct any errors on these records first.
3. Customers and Jobs in QB: Jobs in QuickBooks = Sites/Locations in Field Service Management. If prior to purchasing FSM your business has been using Jobs in QB as “work orders”, you probably have many Jobs in QB for the same “Customer Site”. If this is the case, please call FSM Support prior to running the First-time sync between FSM and QB to discuss ways to manage your existing QB data when synced into FSM.
4. Service/site address: FSM pulls the billing information from the QB “Bill To” field and the service/site address from the “Ship To” field. Even if the billing and service addresses are the same for your customer, there must be entries in both the “Bill To” and the “Ship To” in QB. If the “Ship To” in QB is left empty, then there will not be an address on the work orders in FSM for those customers. There are several ways this can be corrected:
 - a. One at a time in QB by clicking the “copy” button between the addresses in the customers’ records.
 - b. In FSM by editing the site address when customers call in for service.
 - c. All at once by exporting your customer list from QB to Excel and copy the “Bill To” columns to the “Ship To” columns and importing the list back into QB.
 - i. *If this is what you would like to do then any questions should be directed to Intuit QuickBooks Support.*
5. Work zones: If you need to setup multiple office locations in two or more service areas (usually different cities, states, etc.) then you should contact support@corrigo.com, call 800-517-2871, or one of our [Local Experts](#) to assist you. This must be setup correctly before your initial sync to bring customers into FSM or you will not have another opportunity.
6. Estimating the time for Initial Sync between QB and FSM: It takes about an hour per chunk of 1,000 records. To save time any customer records or job levels that can be made “inactive” should be made inactive prior to the initial sync with FSM. FSM will not attempt to sync inactive items, customers, or jobs from QB. If you have more than 6,000 customers/jobs in QB, we recommend inactivating records so you are bringing them into FSM in increments of 5,000.