

Setting Up QuickBooks

Setting-Up QuickBooks

If you are using QuickBooks in conjunction with FieldMaster Pro, there are some things you should do to ensure the most successful integration between FieldMaster Pro and QuickBooks. Quite simply, you will want to make sure that your QuickBooks file is in good order. We suggest doing this before you place your order. Following are some suggestions for preparing your current QuickBooks file to integrate with FMP:

- Employee List
 - Make sure all your employees are listed correctly (same format)
 - Delete or inactivate any unwanted or unnecessary entries (employee entries that you no longer want in your file, entries that may have been mistakes, duplicates, etc.).
- Customer: Job List
 - *Clean-up* your Customer: Job list by Inactivating or Deleting unwanted entries (customers or jobs). Remember to look for duplicate entries of the same customer and entries that may have been mistakes.
 - Make sure your customers are listed correctly and that entries are consistent (i.e., *LastName, FirstName* or *FirstName LastName*).
 - If a customer has multiple work sites, make each work site a *job* under a single customer entry (drag-and-drop as needed). *Note: After the integration with FMP is established, your ability to drag-and-drop customers and jobs will be limited, so now is the time to do this.*
 - Make sure that your *Bill To* and *Ship To* addresses have a consistent format, such as:
 - Customer Name
 - Address Line 1
 - Address Line 2
 - City, State, Zip
- Item List
 - Delete any unwanted or unnecessary items (items that you no longer want or need, entries that may have been mistakes, duplicates, etc.)
 - Make changes to item names and descriptions as desired
 - Make sure that the names and descriptions of your items have the same format
 - This can be a good time to simply organize your item list
- If you decide you want to create a new QuickBooks data file, now is the time to do so. It is much easier to do this before the integration between

QuickBooks and FieldMaster Pro has been established. If you need assistance with the above, a FieldMaster Solutions representative will be available to provide a 30-minute review of your QuickBooks file and offer suggestions based on the above guidelines. *Note: This will in no way be a financial consultation. We will refer any accounting issues, questions, etc. to your accountant or other applicable professional.*

Installing FieldMaster Pro

Below is intended to give you an idea of the steps that will take place to get you up-and running with FieldMaster Pro.

Control

- Web-based database is setup by FMS representative based on a Company ID that you will choose.

Financial Client

- Download the Financial Client setup file to the machine where it will be installed (a link will be provided for you to download the file).
- The setup file must be installed on a computer on which QuickBooks is installed.
- A FieldMaster representative will install Financial Client via an on-line computer session such as WebEx.

Porting Data

- Moving data from QuickBooks to FieldMaster is part of the Financial Client installation; this is typically completed within a couple hours.
- If you track data in a separate program or database, we may or may not be able to import that data into FieldMaster. If we can import such data, this is done for an additional fee based on your specific need and the time that will be involved.

Mobilize

- The Mobilize software will be loaded on the device the first time that device is connected to the Internet.
- Installation and activation is straightforward and user-friendly.
- If using the device emulator on a laptop, installation will be done either via a CD-ROM or a download from the Internet.

Selecting and Activating Cellular Service

- What wireless company seems to have the best coverage in your service area?
- Purchase *data* accounts for each of your devices.

Training

- We train employees whom you select; they in turn train additional employees.
- (Train-the-Trainer). This training is done remotely via live, interactive web based sessions.
- Access the FieldMaster training materials on the Internet at your convenience.
- Additional training sessions are provided for a fee.

Customer Service

- Email support
- Live chat support
- Telephone support
- Web-based help center
- On-line user group