

Troubleshooting the installation of the FSM Sync utility for QuickBooks

The synchronization between FSM and QB occurs through a dedicated utility created by Corrigo (it does not use the QB Web Connector). After downloading and installing the "Corrigo QuickBooks Integration Client" when the QB Admin logs into QuickBooks you should see the "Intuit Field Svc. Integration" menu choice on the File menu. If not, please follow these steps to troubleshoot the installation of your FSM Sync utility.

1. Check you are using the correct operating system: Go to your computer's start menu, right-click Computer, select Properties. Windows Edition 7 will need to be either Business or Professional; if running Windows 8 then contact FSM Technical Support at 800-517-2871 or email support@corrigo.com for instructions on the necessary permissions on Windows 8.
2. Next check for two QB processes running in the background that will block the sync from your QB:
 - ✓ First close QB, Ctrl+Alt+Delete to open Task Manager, go to the processes tab, and end process QBW32.exe as well as QBEventShim.exe if it is present.
 - ✓ Next you need to Right-click on the QB icon and select "Run as Administrator" then log in using the Admin user for QB.
3. If the FSM Sync still does not show up in the File menu you will need to:
 - ✓ Switch QB to user mode
 - ✓ Go to Edit/Preferences/Integrated Application/Company Preferences tab
 - ✓ Make sure all instances of "Corrigo Integration and Intuit Field Service Integration" have checks beside them. Also click on each of them one at a time and click properties. Inside you should have the boxes checked "Allow this application to read and modify this company file" Allow this application to log in automatically" (choose Admin) and the bottom one Allow this program to access Social Security Numbers, customer credit card information, and other personal data. Do not worry about that last one it simply allows the sync to be able to look at the information we do not use it in any way. Basically if you have CC or SS# they are considered "part of" the record and if it cannot read them it cannot read any of it.

