

FIELD SERVICE MANAGEMENT

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FSM - Sync - Migrating from QBD to QBO

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Title

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Body

FSM - Sync - Migrating from QBD to QBO

Please follow these steps **prior** to migrating your QuickBooks data to QBO from QuickBooks Desktop (Pro/Premier/Enterprise). Failure to follow these steps will result in duplicated Items and possibly lost data in your Field Service Management account “FSM”.

1. In FSM prepare and approve any open invoices. Open QuickBooks and run the FSM Sync. Once the migration process is completed any prepared invoices will need to be re-done.
2. QuickBooks Company/FSM file Clean-up
 - a. Make any customers that will not be in your New QBO inactive
 - b. Make updates to active customer information if needed
3. In QuickBooks, on the item list make all Service, Non-inventory, and Inventory items inactive.
4. Run the sync to update the customer list in FSM and remove the Items in FSM. If you have any errors during this sync make a note of them and contact Corrigo Technical Support before moving on if you do not know how to correct the errors yourself.
5. Look in FSM Settings>Financial>Price Lists under every category to ensure there are no items left. If there are any manually delete them all. If there are several you can delete the entire category. You will only need to have one category available to sync QBO.
6. In your QuickBooks, make a backup of your QB Company file for safekeeping.

7. DO NOT make any changes in the QB company file or the FSM subscription until you have reached Step 10 below.
8. Log into your new QBO account. Follow the steps inside QBO to upload your QB Desktop data to the QBO account.
9. Once you have all the QBD data in your QBO account, log back into FSM.
 - a. Click Settings/Company/Integration and click Edit to change the integration from Desktop to Online.
 - b. Follow the on-screen prompts to connect the FSM with your QBO account and complete the “first time sync with QBO”. The first time sync on QBO will run much more quickly than with the QBD.
10. Once the first-time sync is complete you may resume using both QBO and FSM “live”.

Invoice Numbering

During the configuration of the synchronization settings between FSM and QBO, pay attention to the numbering of invoices and how these invoice numbers will appear in QBO.

- If you use the “**When Invoices are Copied use QuickBooks Online Numbering**” option, the invoice in QBO will be the next invoice inside QBO.

In order to successfully use QBO numbering you will need to take the steps outlined below in QB;

1. Go into your QBO settings and turn on custom transactions
2. Set your custom QBO numbering scheme
3. Create about 5 test invoices under any one customer
4. Go back into your QBO settings and turn off custom transactions

- If you use the “**When Invoices are copied use Service Management Numbering**“, make sure any manually-created invoices in QBO have a different number format than the invoices syncing from FSM. If there is an existing invoice number in QBO that is identical to one syncing from FSM, the invoice in QBO will be overwritten by the new invoice from FSM.

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FSM-Sync-Migrating-from-QBD-to-QBO

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