



# Setting Up QuickBooks Web Connector

## *Instructions*

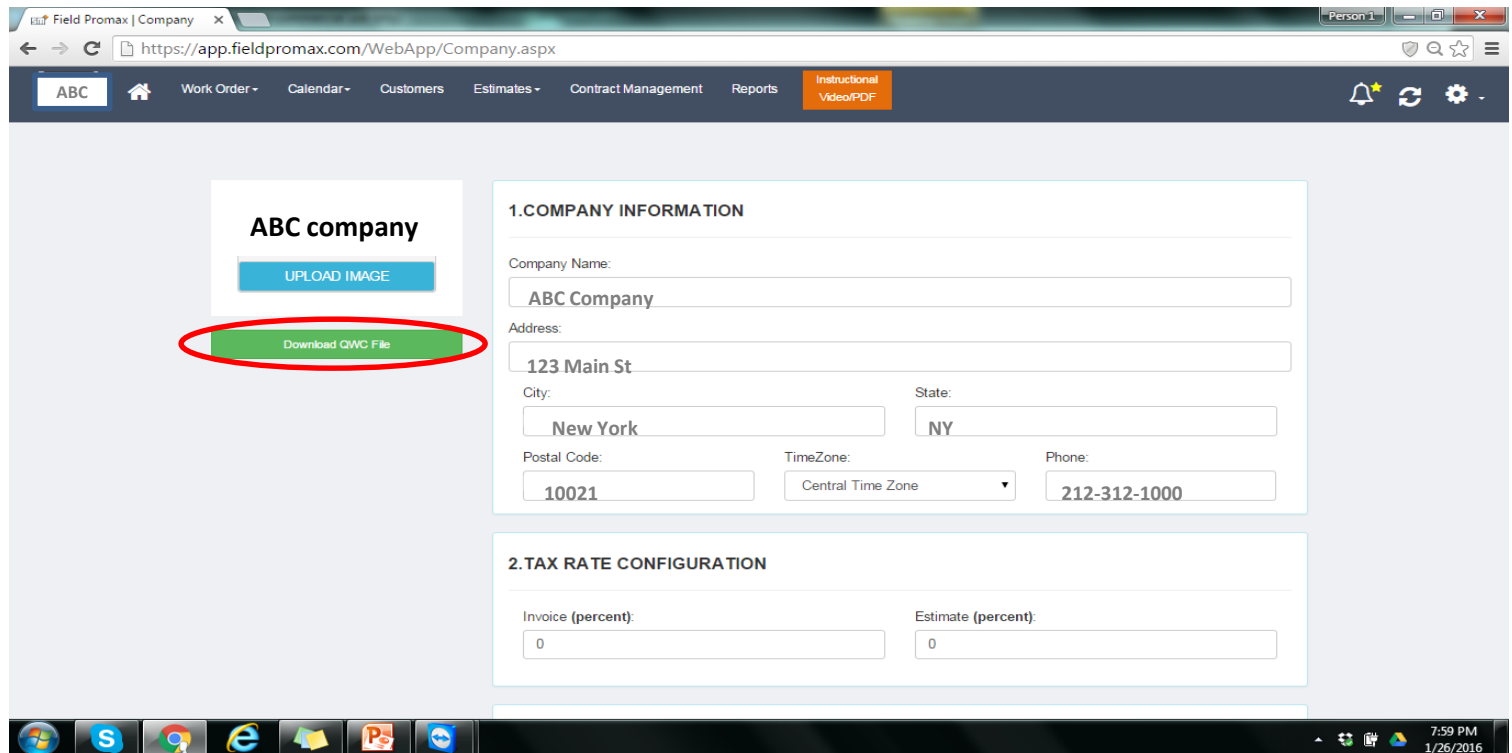


## **What is the QuickBooks Web Connector?**

The QuickBooks Web Connector is a software application that synchronizes data between QuickBooks and software applications like Field Promax.

## How to setup QuickBooks Web Connector

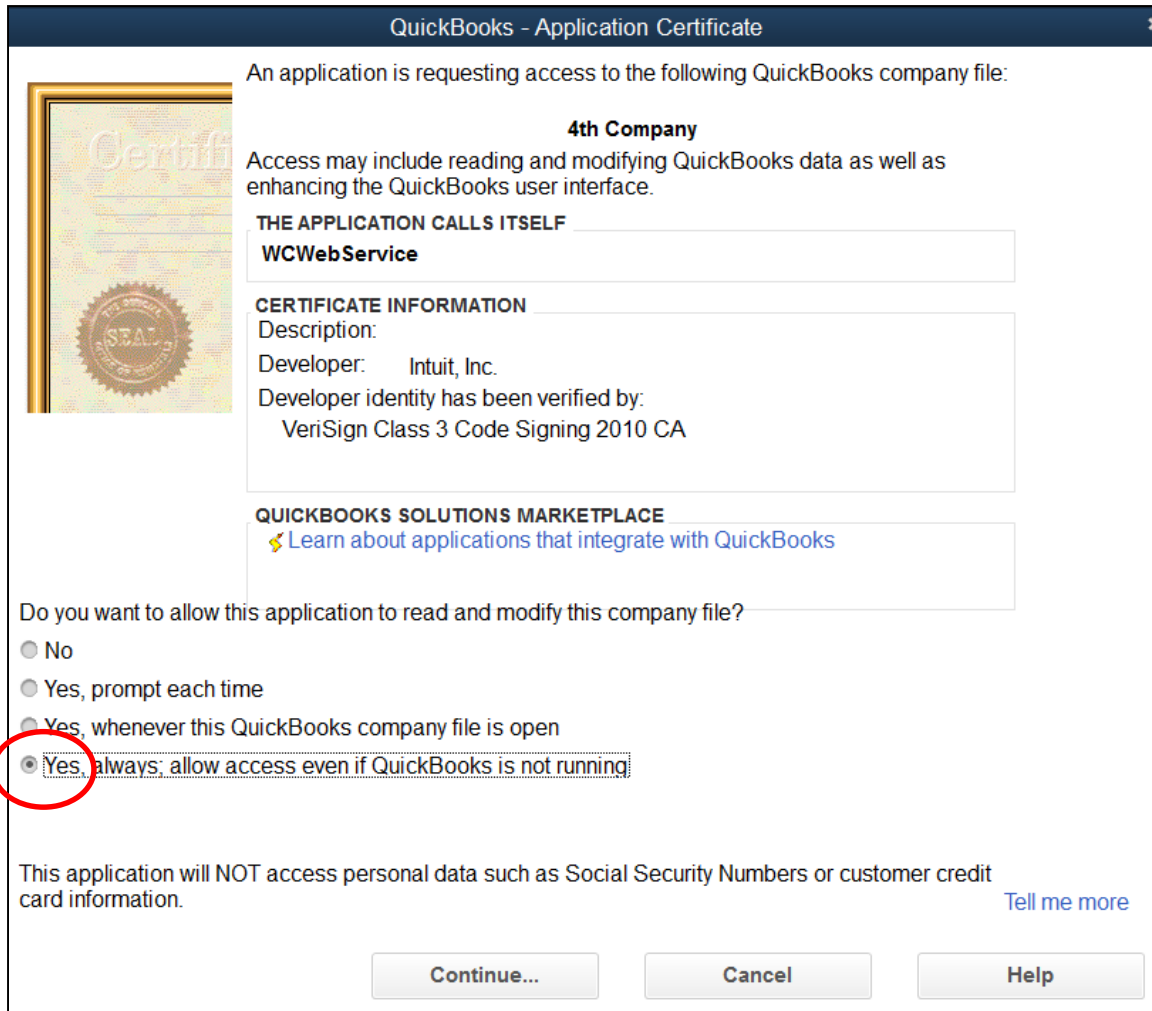
1. Ensure QuickBooks and Field Promax are running . QuickBooks needs to be in single user mode.
2. In FieldPromax:
  - Go to **Setup** → **Company**
  - Click on the **Download QWC** file and save it in the folder where your QuickBooks resides.



The screenshot shows the 'Company' setup page in the Field Promax web application. The page is titled 'ABC company' and features a navigation menu at the top with options like 'Work Order', 'Calendar', 'Customers', 'Estimates', 'Contract Management', 'Reports', and 'Instructional Video/PDF'. The main content area is divided into two sections: '1. COMPANY INFORMATION' and '2. TAX RATE CONFIGURATION'. In the '1. COMPANY INFORMATION' section, there are input fields for 'Company Name' (filled with 'ABC Company'), 'Address' (filled with '123 Main St'), 'City' (filled with 'New York'), 'State' (filled with 'NY'), 'Postal Code' (filled with '10021'), 'TimeZone' (set to 'Central Time Zone'), and 'Phone' (filled with '212-312-1000'). In the '2. TAX RATE CONFIGURATION' section, there are input fields for 'Invoice (percent)' and 'Estimate (percent)', both filled with '0'. A red circle highlights the 'Download QWC File' button, which is located below the 'ABC company' header and above the '1. COMPANY INFORMATION' section.

3. From your computer's **start menu** click on the **Web Connector**
4. Click on **Add an application** and select the **QWC file** that was downloaded in Step 1.

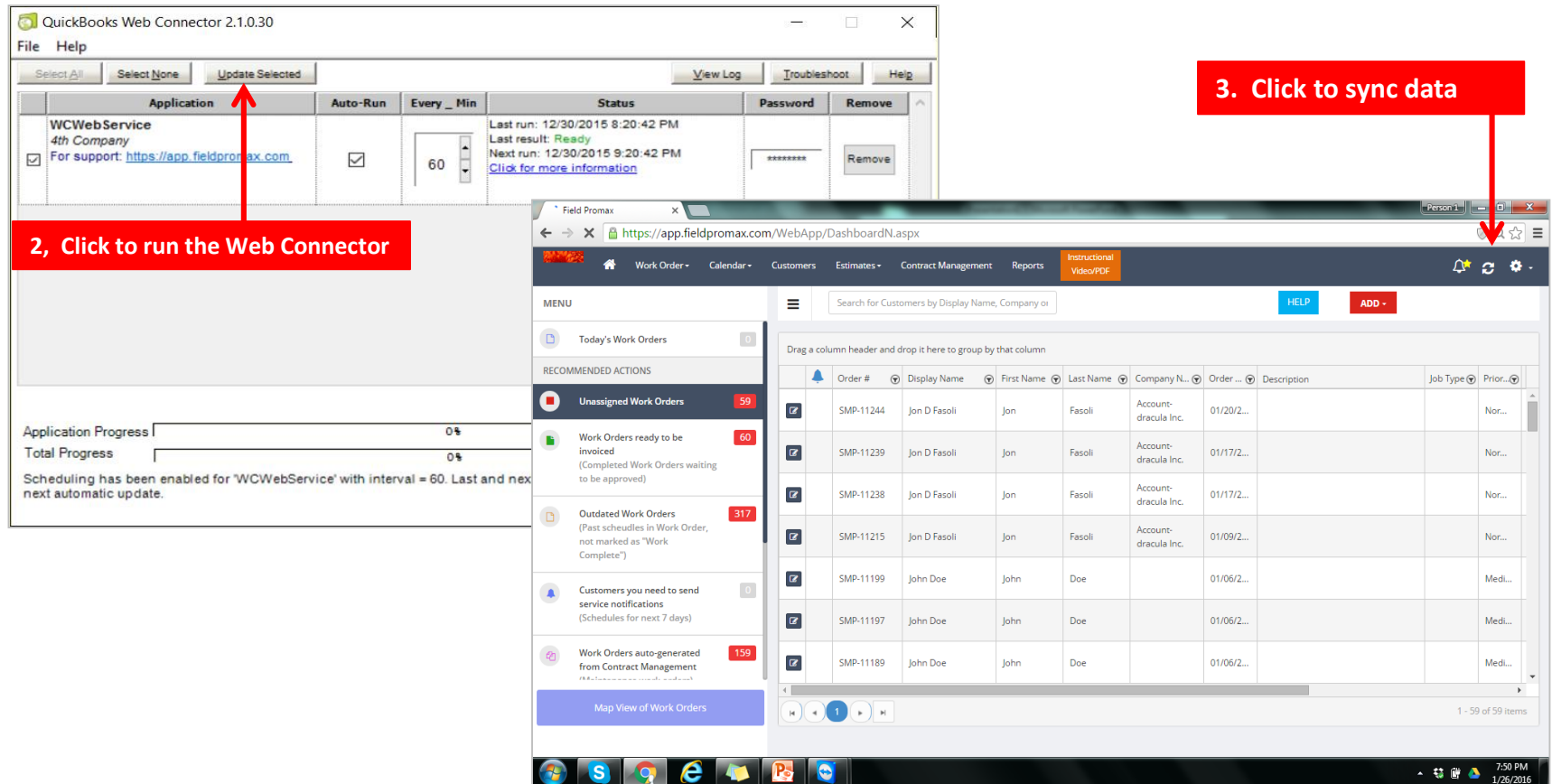




5. Select the last option:  
*Yes, always allow access even if QuickBooks is not running*

## Syncing data between QuickBooks and Field Promax.

1. Ensure QuickBooks and Field Promax are running.
2. Run the web connector.
3. Click on the sync button in Field Promax



The image shows two overlapping windows. The top window is the 'QuickBooks Web Connector 2.1.0.30' application. It has a menu bar with 'File' and 'Help'. Below the menu bar are buttons for 'Select All', 'Select None', 'Update Selected', 'View Log', 'Troubleshoot', and 'Help'. A table lists the configured applications:

Application	Auto-Run	Every _ Min	Status	Password	Remove
WCWebService 4th Company For support: <a href="https://app.fieldpromax.com">https://app.fieldpromax.com</a>	<input checked="" type="checkbox"/>	60	Last run: 12/30/2015 8:20:42 PM Last result: <b>Ready</b> Next run: 12/30/2015 9:20:42 PM <a href="#">Click for more information</a>	*****	Remove

A red arrow points from the 'Update Selected' button to a red callout box that says '2, Click to run the Web Connector'. Below this callout is a progress bar showing 'Application Progress' and 'Total Progress' at 0%. A note states: 'Scheduling has been enabled for 'WCWebService' with interval = 60. Last and next automatic update.'

The bottom window is the 'Field Promax' web application. The address bar shows 'https://app.fieldpromax.com/WebApp/DashboardN.aspx'. The navigation bar includes 'Work Order', 'Calendar', 'Customers', 'Estimates', 'Contract Management', 'Reports', and 'Instructional Video/PDF'. A search bar is present with the text 'Search for Customers by Display Name, Company or'. Below the search bar is a table of work orders:

Order #	Display Name	First Name	Last Name	Company N...	Order ...	Description	Job Type	Prior...
SMP-11244	Jon D Fasoli	Jon	Fasoli	Account- dracula Inc.	01/20/2...			Nor...
SMP-11239	Jon D Fasoli	Jon	Fasoli	Account- dracula Inc.	01/17/2...			Nor...
SMP-11238	Jon D Fasoli	Jon	Fasoli	Account- dracula Inc.	01/17/2...			Nor...
SMP-11215	Jon D Fasoli	Jon	Fasoli	Account- dracula Inc.	01/09/2...			Nor...
SMP-11199	John Doe	John	Doe		01/06/2...			Medi...
SMP-11197	John Doe	John	Doe		01/06/2...			Medi...
SMP-11189	John Doe	John	Doe		01/06/2...			Medi...

A red arrow points from a red callout box that says '3. Click to sync data' to a sync button in the top right corner of the Field Promax dashboard. The dashboard also features a 'MENU' on the left with sections for 'Today's Work Orders', 'RECOMMENDED ACTIONS', and 'Unassigned Work Orders' (59). Other actions include 'Work Orders ready to be invoiced' (60), 'Outdated Work Orders' (317), 'Customers you need to send service notifications' (0), and 'Work Orders auto-generated from Contract Management' (159). A 'Map View of Work Orders' button is at the bottom of the menu.