

WORKTRACK™

Service Management

QuickBooks Merchant Services
Integration

User Guide

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Version 4 jrp



WorkTrack QuickBooks Merchant Services Integration -- User Guide

Overview

This guide explains how to integrate WorkTrack Service Management with QuickBooks Merchant Services for credit card processing. The following assumptions apply to the use of this guide:

- You have a valid URL, user ID, and password for your Corrigo WorkTrack product, acquired either through free-trial or purchase.
- Your computer has Internet access.
- You have a basic understanding of how to operate a supported version of Microsoft Windows, including how to use Internet Explorer as an Internet browser.
- *For Credit Card Processing:* You have a valid QuickBooks Merchant Services Account

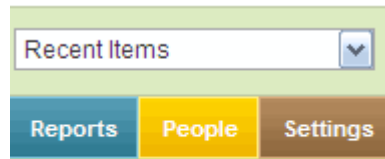
Using This Guide

Appearance:	Since your company can customize Corrigo software by changing screen appearance, words, and phrases used in the application, some images used in this guide may not exactly match those that appear on your screens.
Conventions:	The Corrigo WorkTrack product you use will be referred to as the web application within this guide.
Path Reference:	Path references will be used in this guide to direct you to the appropriate screen within your software products. For example, to reach the client download screen in your Corrigo product, the path is Settings > Financial > QBMS Integration. This means that, within your Corrigo web application, you select the Settings page, choose the Financial tab on that page, then select the QBMS Integration option from the Financial menu.
System Administrator:	This is the person at your company who manages your Corrigo and QuickBooks programs. The term System Administrator is used in this guide.

Service Management Onscreen Conventions

How Do I?

Integrated into WorkTrack is an on-demand help system that can guide you through configuration and application use. To access the help system, click the **How Do I?** link in the upper right corner of each WorkTrack screen.



[How Do I?](#)

Activity Center:

The WorkTrack Service Management web application is divided into groups of user functions, called Activity Centers. For example, customer functions, such as adding or viewing a customer record, are found in the Customer Activity Center. To access an Activity Center, click the appropriate button on the Activity Center bar:



Figure 1: How Do I? link (top) and Activity Center button bar (bottom)

System Requirements

Supported Operating System:

WorkTrack Service Management can be used with the following Microsoft Windows operating system versions:

- Microsoft Windows 2000, XP, and Vista operating systems, using Internet Explorer version 6 or higher as your Internet browser

Integrating WorkTrack with QBMS

Overview

WorkTrack Service Management allows techs using mobile devices to process credit cards in the field. Credit card payments are processed through WorkTrack and, with QuickBooks integration, can be updated in your QuickBooks accounting system. In order for credit card processing to work, you must integrate WorkTrack with QuickBooks Merchant Services (QBMS).

Starting the Integration Process

To Integrate WorkTrack with QuickBooks Merchant Services:

1. Log into the Corrigo web application.
2. Within the web application, go to **Settings > Financial > QBMS Integration**.

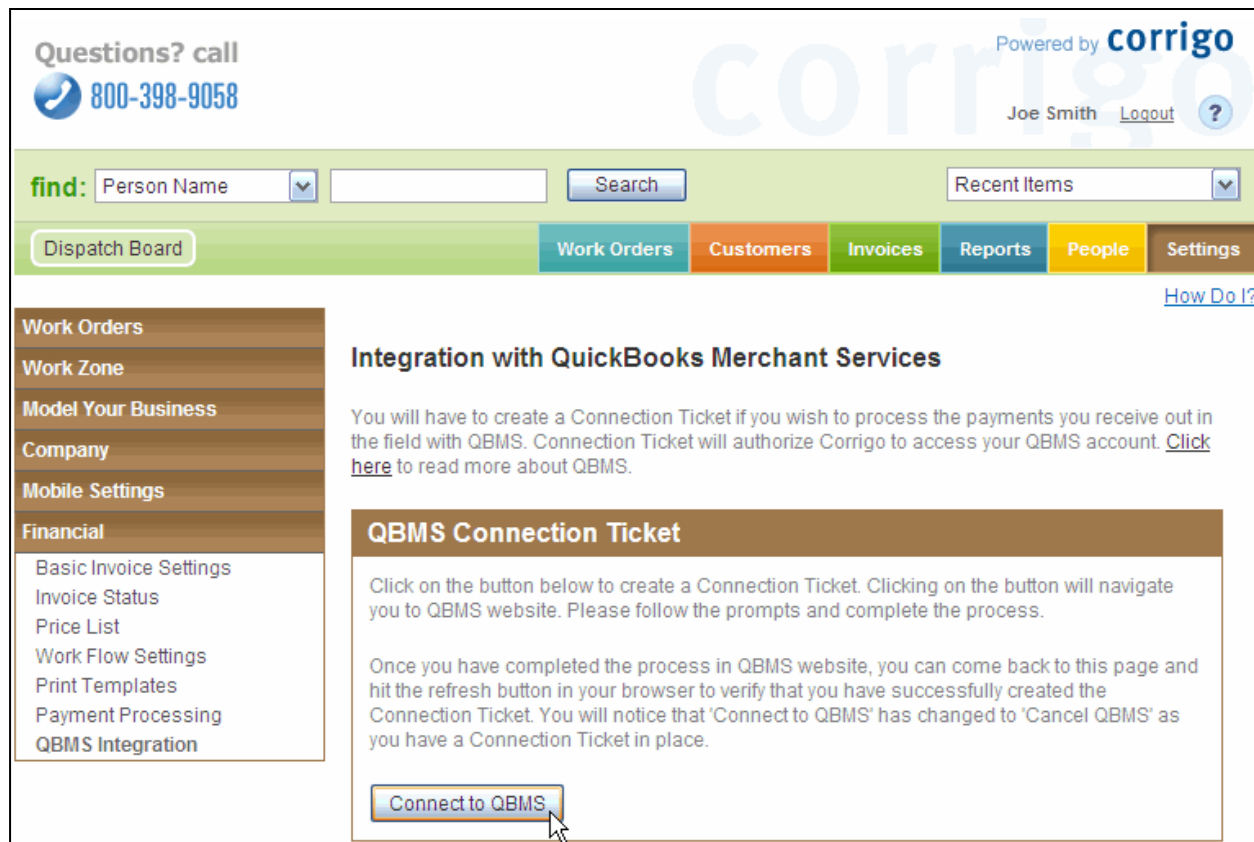


Figure 1: WorkTrack **Settings>Financial>QBMS Integration**

3. If you want to learn about QBMS and how to set up an account, select the **Click here** link in the text beneath Integration with QuickBooks Merchant Services.

Integration with QuickBooks Merchant Services

You will have to create a Connection Ticket if you wish to process the payments you receive out in the field with QBMS. Connection Ticket will authorize Corrigo to access your QBMS account. [Click here](#) to read more about QBMS.

Click

Click here to launch information window

QuickBooks
MERCHANT SERVICE

WORKTRACK
powered by **corrigo**

QuickBooks
Merchant Service
for WorkTrack Service Management

[View Demo](#) [Apply Online](#) Or call (877) 212-6771

Get paid faster and reduce bad debt!

Quickbooks Merchant Service works with WorkTrack's mobile payment capabilities, giving you everything you need to accept credit card payments in the field.

[Sign up](#) for a QuickBooks Merchant Service account today and get your first month fees waived and **FREE** QuickBooks Simple Start Plus Pack 2008! **Save up to \$235!**

[Apply Online](#) Or call (877) 212-6771 today!

Already accept credit cards?
We'll do our best to meet or beat your rates!

Figure 2: Select **Click Here** in **Settings > Financial > QBMS Integration** (top) to launch the QBMS information site in a separate browser window (bottom)

4. Click **Connect to QBMS** to start the connection process.

The image shows two screenshots. The top screenshot is titled "QBMS Connection Ticket" and contains the following text: "Click on the button below to create a Connection Ticket. Clicking on the button will navigate you to QBMS website. Please follow the prompts and complete the process." and "Once you have completed the process in QBMS website, you can come back to this page and hit the refresh button in your browser to verify that you have successfully created the Connection Ticket. You will notice that 'Connect to QBMS' has changed to 'Cancel QBMS' as you have a Connection Ticket in place." Below the text is a button labeled "Connect to QBMS". A red arrow points from the text "Clicking here will launch this website in a new browser window" to the button. The bottom screenshot is a browser window titled "Intuit Business Services: Application Confirmation - Windows Internet Explorer". It features the Intuit logo and a section titled "Attach Applications". The text in this section reads: "This wizard helps you set up a connection between **Corrigo work order management solution.** and your **QuickBooks Merchant Service** account for processing credit card payments." It also includes instructions: "Before you begin, you must make sure that your QuickBooks Merchant Service account is enabled for eCommerce processing *. If you have not already done so, please contact a QuickBooks Merchant Service customer service specialist at (800) 558-9558 to activate this service." and a list of steps: "Here are the steps you'll follow: 1. Enter login information for your QuickBooks merchant account 2. Learn how a connection works 3. Choose a connection name". At the bottom of the wizard, there are two buttons: "Proceed to Login Page" and "Cancel". A mouse cursor is hovering over the "Proceed to Login Page" button. A note at the bottom states: "**NOTE** To minimize customers confusion and chargebacks, the name of the business that appears on your website must be the same as the Doing Business As (DBA) listed on the QuickBooks Merchant Service account you will be using with **Corrigo work order management solution..**"

Figure 3: Click **Connect to QBMS** (top) to start the connection process and launch the QBMS wizard in a new browser window (bottom)

When you start the QBMS connection process, you will be guided to the Intuit / QuickBooks website in a new browser window. If you do not have a QuickBooks Merchant Services account, follow instructions at the site to set up an account.

If you have a QuickBooks Merchant Services account, click **Proceed to Login Page**. Follow links on the login page if you need further assistance (see Figure 4).

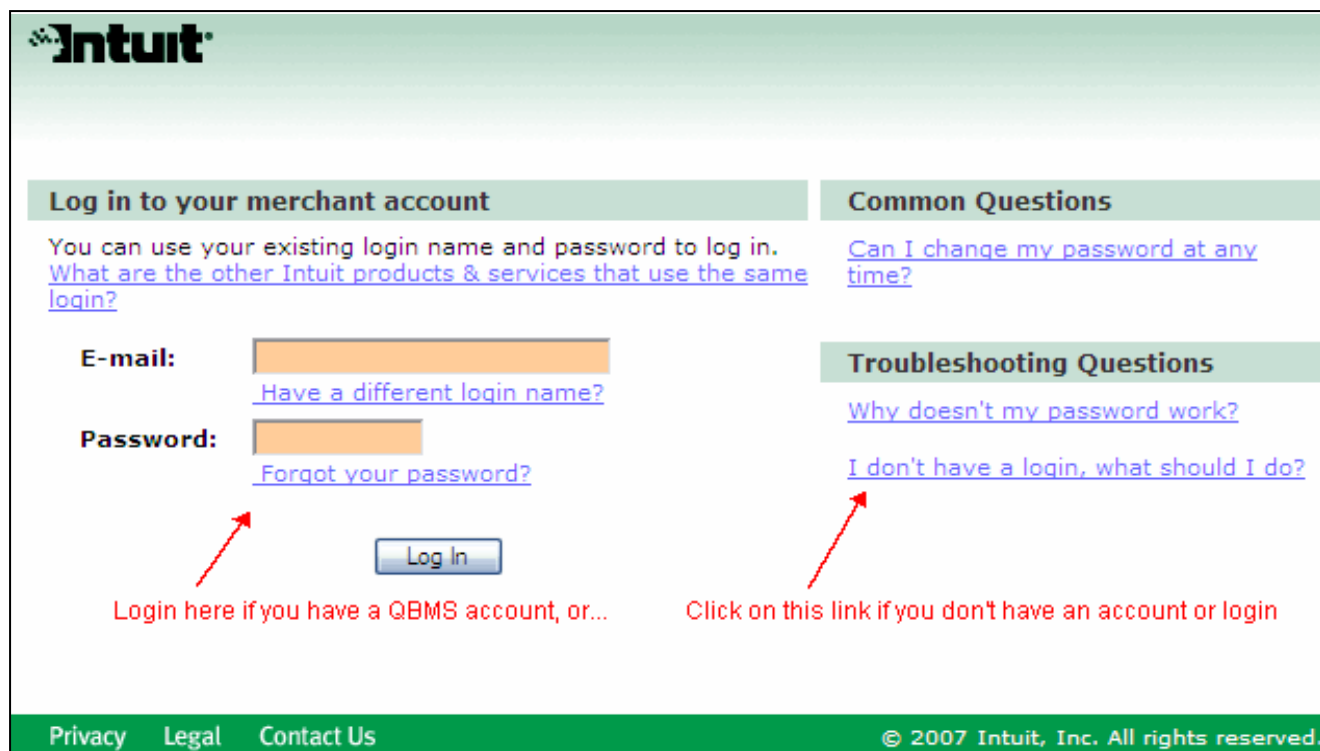


Figure 4: The QuickBooks Merchant Services account login page

Troubleshooting

Technical Support:

Phone

WorkTrack Service Management: 877-701-8326 (toll-free)

Email

support@corrigo.com