



Partnered with

Contractor Foreman and QuickBooks Online Intersystem 2 - Day Onsite Setup and Training Plan





Partnered with

Day 1: Training QuickBooks Online Team and Workflow from Contractor Foreman

Time sessions are flexible based on needs, but more of a reference to staying on track purposes.

8:00am -8:30am: Introduction and getting setup for training:

- The Goals and Objectives of this 2-day on-site training
- What Smart Business Solutions training covers and doesn't cover in Contractor Foreman
- Recommendations to resolve any current issues and create a better intersystem workflow to help the company better reach its goals and objectives.
- What media is available to use for training. Large wall screen, Monitor or projector?
- Conference room? Or office?

8:30am-10:30am: Discovery Stage: Learning about the Company:

- Past issues, future goals.
- Current Procedures and Workflows.
- What are some areas you would like to see improvement?
- Most common struggles with workflow and communication between the office personal and the field crew?
- How are expenses out on the field handled? Reimbursements or other?
- Employee credit cards, tracking receipts and reporting to the office,

10:30am –12:00pm: Independent Work and Game Plan

- Independent work for office personnel to check emails and conduct some morning business as normal.
- Time for Amber to review all discussed in the discovery stage and work on the plan of action and structure to best move forward and recommended implementation process to present.
- Time for any missed questions and answers.

12:00pm -1:00pm: Lunch time

1:00pm-2:30pm

- Review and verify QBO Settings and proper subscription level.
- Ensuring your Chart of Accounts is set up with all the needed Income, Cost of Goods Sold, and Expense accounts needed for mapping with cost codes set up in Contractor Foreman during the initial integration process for clear company financial reports.
- Creating safeguards in QuickBooks to preventing errors entered Contractor Foreman coming over to the QuickBooks.
- How things flow from Contractor Foreman: Converting new Projects from Contractor Foreman to the Projects Module.
- Best practices of receiving payments from clients to reflect in Contractor Foreman without creating double payments on projects. Handling ACH payments from We pay or Square.
- Common Rules on how to enter expenses and bills into QuickBooks and how they affect Contractor Foreman Reporting.

- How timecards information from CF comes over in QBO. What Syncs and what doesn't. How it effects payroll and how it does not.

2:30-2:45 Break if needed.

2:45pm- 4:00pm

- How to cut time and increase production by delegating project related tasks in Contractor Foreman to improve QuickBooks recording processes.
- Creating safeguards in QuickBooks to preventing errors entered Contractor Foreman coming over to the QuickBooks.
- The importance of using bank feeds in QBO when it comes to intersystem workflow practices.
- How to properly receive transactions that come over from Contractor Foreman into QuickBooks through the bank feeds.

4:00pm – 4:30pm

- Follow-up work or additional questions discovered throughout the day.

Day 1 – Completed!





Partnered with

Day 2: Crew Team Training and Workflow in Contractor Foreman

Time sessions are flexible based on needs, but more of a reference to staying on track purposes.

8:00am -9:30am: Introduction and getting media setup for training:

- Any Follow-up questions or review from the previous days training?

9:30am-10:30am: (Admin/Owner) who oversees most operations in CF: Discovery Stage: Learning about the CF Crew members, PM, Estimators, roles and responsibilities.

- Current Procedures and Workflows in the field and status of work in Contractor Foreman.
- Most common struggles with workflow and communication between the office personal and the field crew?
- How are expenses out on the field handled? Reimbursements or other?
- Current Procedures of field employee purchases, tracking, and handling receipts and reporting to the office.
- If not discussed in day 1: Discuss the recommended safeguards procedure and best workflow practice for entering expenses in CF to see if this is something he also agrees with before implementing.
- What are some areas you would like to see improvements in CF I can take back to the owners of Contractor Foreman.
- Review and verify CF Settings and timecard setup.

10:30am –12:00pm: Creating workflow Game Plan

- Independent work for office personnel to check emails and conduct some morning business as normal.
- Time for Amber to review all discussed in the discovery stage with owner for CF side and work on the plan of action and structure to best move forward, and recommended implementation process to present in workflow training.
- Time for any missed questions and answers.

12:00pm -1:00pm: Lunch time

1:00pm-1:30pm: Setup for Contractor Foreman Workflow Training, final preparation, and admin questions

1:30-3:30pm: CF Workflow Training with CF QB Team, PMs, Estimators, Owners.

- Timecards and App download for all employees working on projects.
- Clocking in and out correctly against projects.
- Cost Items database and assigning code codes to each item. Importing from Items databases and 1build.com and creating templates and stages.
- Estimates (Where everything starts)>Approved> Starts Project and add to SOV (most recommended to avoid double billing. (Triggers project to QBO)
- Purchase Orders if used in CF.
- Using the app and phone to capture expense receipts used on a company card with safeguards in place.
- Enter any project related expenses, POs, Bills (If preferring to enter subcontractor bills in QBO we will address this on first day), ect. in CF. If some expenses are more overhead related, we will discuss this too.
- Change Orders and How they are invoiced through SOV
- Services Tickets and Work Orders if used and how to invoice them through SOV

- Invoicing From Schedule of Values (Best overall practice)
- Reviewing the project summary in a project. QBO team can compare in QBO Projects.
- Receiving Payments in CF and best practice to avoid double entry.

3:30pm – 4:30pm Questions & Answers

- Makes Notes of questions during our training for this time. Many questions may be answered during the Intersystem Training
- Follow-up work or additional questions discovered throughout the day. (Sometimes time does not allow for everything to be addressed and some follow-up work may be required after our time together and can be done remotely.

Day 2 – Completed! Good Work Everyone.

Time to say goodbye for now but not for good. We are always here for you to help you grow if you need us.

