



Partnered with

## **Advance Integration System Setup**

(After the basic 90 System Review- Paid by CF)

**1hr assisted integration Included instead of using guides.**

**Cost codes setup assistance. (Advanced cost codes template included if needed) (multiple sets will require additional costs)**

**We will do Chart of accounts mapping and assist with adding required COGS accounts,  
(QB Online Only do to limited access with QBDT)**

### **2-hour Intersystem best practices training**

- Going Through Settings and things to know
- Clocking in and out correctly against projects. Establish Wage Rates
- Estimates (Where everything starts)>Approved> Starts Project and add to SOV (most recommended to avoid double billing. (Triggers project to QBO)
- How things flow from Contractor Foreman: Converting new Projects from Contractor Foreman to the Projects Module.
- 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.

**One additional hour of integration support**