



Partnered with

One Day Virtual Intersystem setup and Training

Makes Notes of questions during our training for this time. Many questions may be answered during the Intersystem Training

1pm-1:30 EST (This start time helps to cover all times within the US and others)

Discovery Stage: Learning about the Company:

- Current Procedures and Workflows.
- 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.

1:30-3:00 EST: QuickBooks Workflow Training: Workflow from Contractor Foreman

- How things flow from Contractor Foreman: Converting new Projects from Contractor Foreman to the Projects Module.
- Discuss the recommended safeguards procedure and best workflow practice for entering expenses in CF.
- If agreed upon I will creating safeguards in QuickBooks to preventing errors entered in Contractor Foreman coming over to the QuickBooks. (This may be done the evening after our meeting to save time on training)
- Best practices of receiving payments from clients to reflect in Contractor Foreman without creating double payments on projects. Handling ACH payments.
- 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 is effects payroll and how it does not.

3:00EST-4:00EST Breaktime

4:30-6:30 pm: CF Workflow Training within CF for QB Team, PMs, Estimators, Owners.

- Timecards and App download for all employees working on projects.
- 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)
- Purchase Orders if used in CF.
- Using the app and phone to capture expense receipts with safeguards in place.
- 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.