

YOUR GUIDE TO -

Quickbooks Integration

2019

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Customer Success Coordinator





Experience the Fastest, Most Reliable Accounting Integration for Ultimate Management of your Construction Finances

Integrating your ConstructionOnline™ account with your QuickBooks software creates a powerful connection that supports bi-directional data syncing, working to eliminate redundant data entry and improve accuracy and efficiency.

Our advanced integration gives you the tools you need to manage your project finances in real-time, allowing you to create estimates, invoices, change orders, and more - faster than ever before.

Powered by Amazon Web Services, you can rest assured that your data is accessible and secure - and never easier to manage in ConstructionOnline 2019.

Ready? Let's get started!

UDA
ConstructionOnline™ +  **intuit quickbooks®**

01

DOWNLOAD

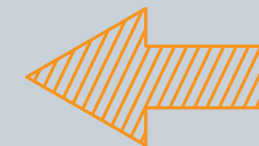
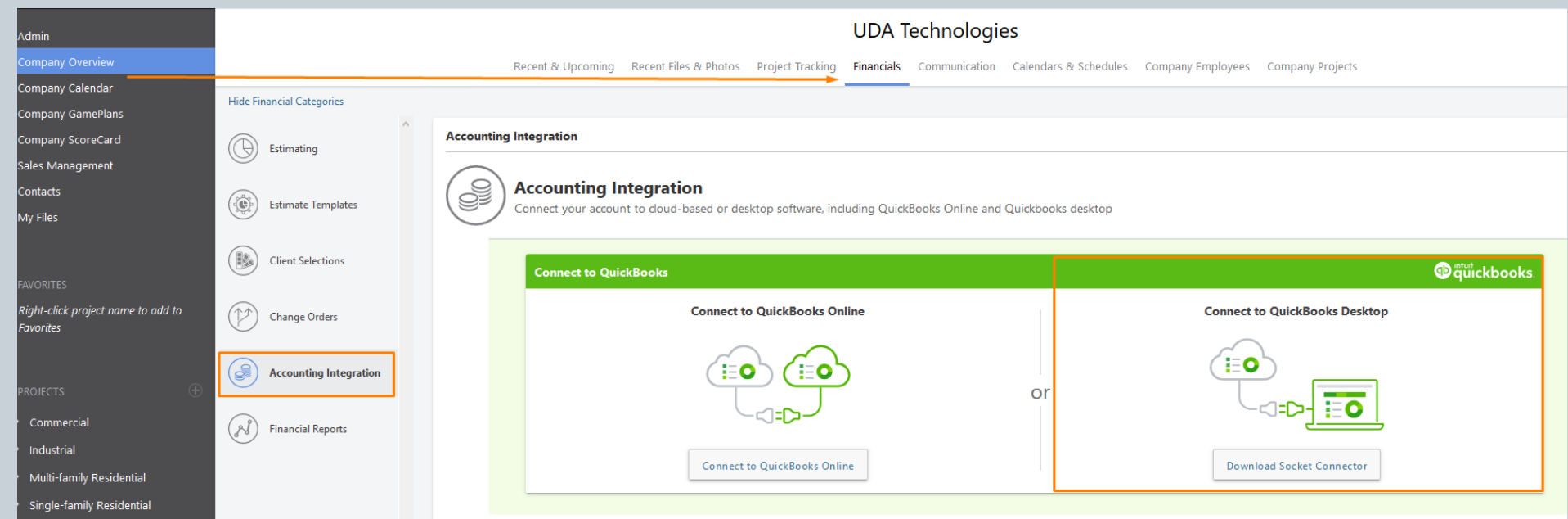
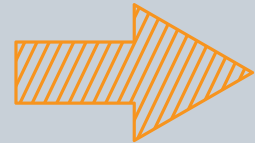


Step 1: Download Socket

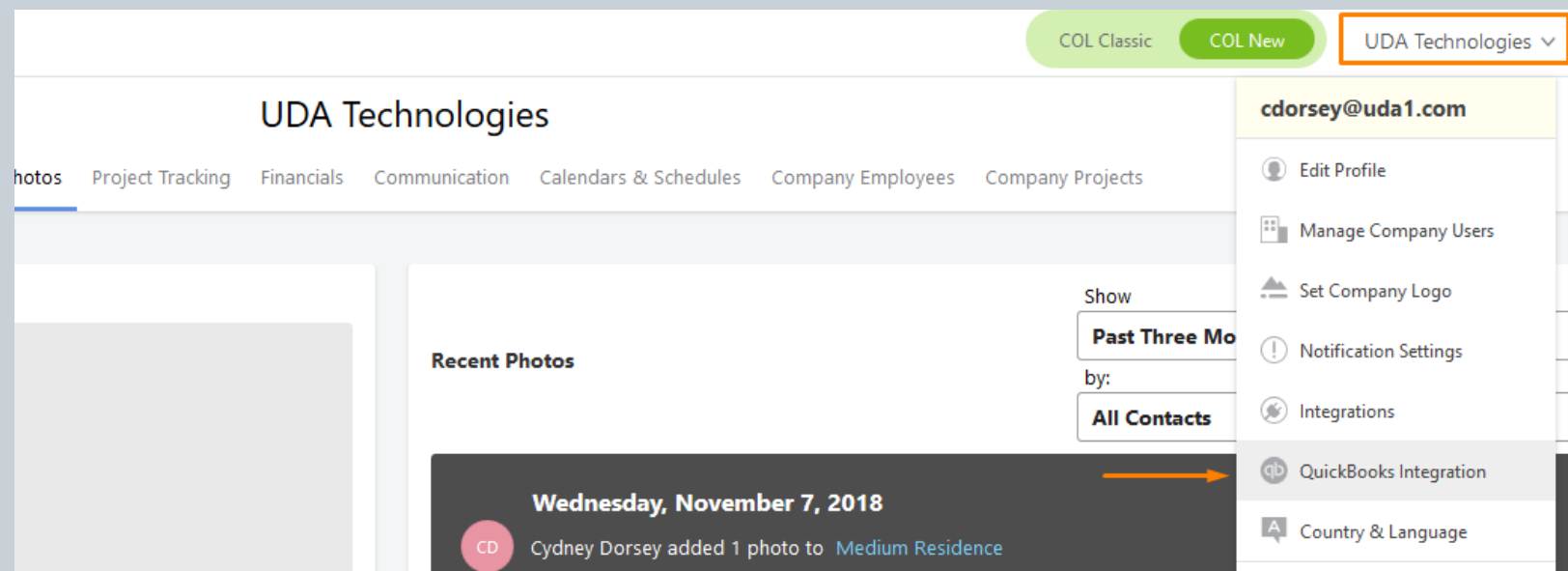
To enable integration between ConstructionOnline + QuickBooks desktop versions, UDA Technologies developed Socket, a desktop helper tool that allows for desktop programs (like QuickBooks and PlanSwift) to communicate with ConstructionOnline.

**Socket can be downloaded from
2 easy-to-access points in ConstructionOnline.**

1. Company Overview



2. Account Settings



Step 1: Download Socket

Socket should be installed on the same computer as your QuickBooks software.

From there, you'll proceed through the process to **Download Socket.**

Download Socket for ConstructionOnline

Socket
for ConstructionOnline™

Intuit **quickbooks** UDA **Construction Online**™

Socket connects your QuickBooks Desktop to ConstructionOnline so you can:

- Create QuickBooks Estimates directly from your ConstructionOnline Estimates
- Create QuickBooks Invoices and Purchase Orders from ConstructionOnline Estimates
- Import Actual Costs, Invoiced Amounts, and Committed costs from QuickBooks

Download **Cancel**

Opening SocketSetup.exe

You have chosen to open:

SocketSetup.exe
which is: Binary File (10.0 MB)
from: <http://www.udadownload.com>

Would you like to save this file?

Save File **Cancel**

Open File - Security Warning

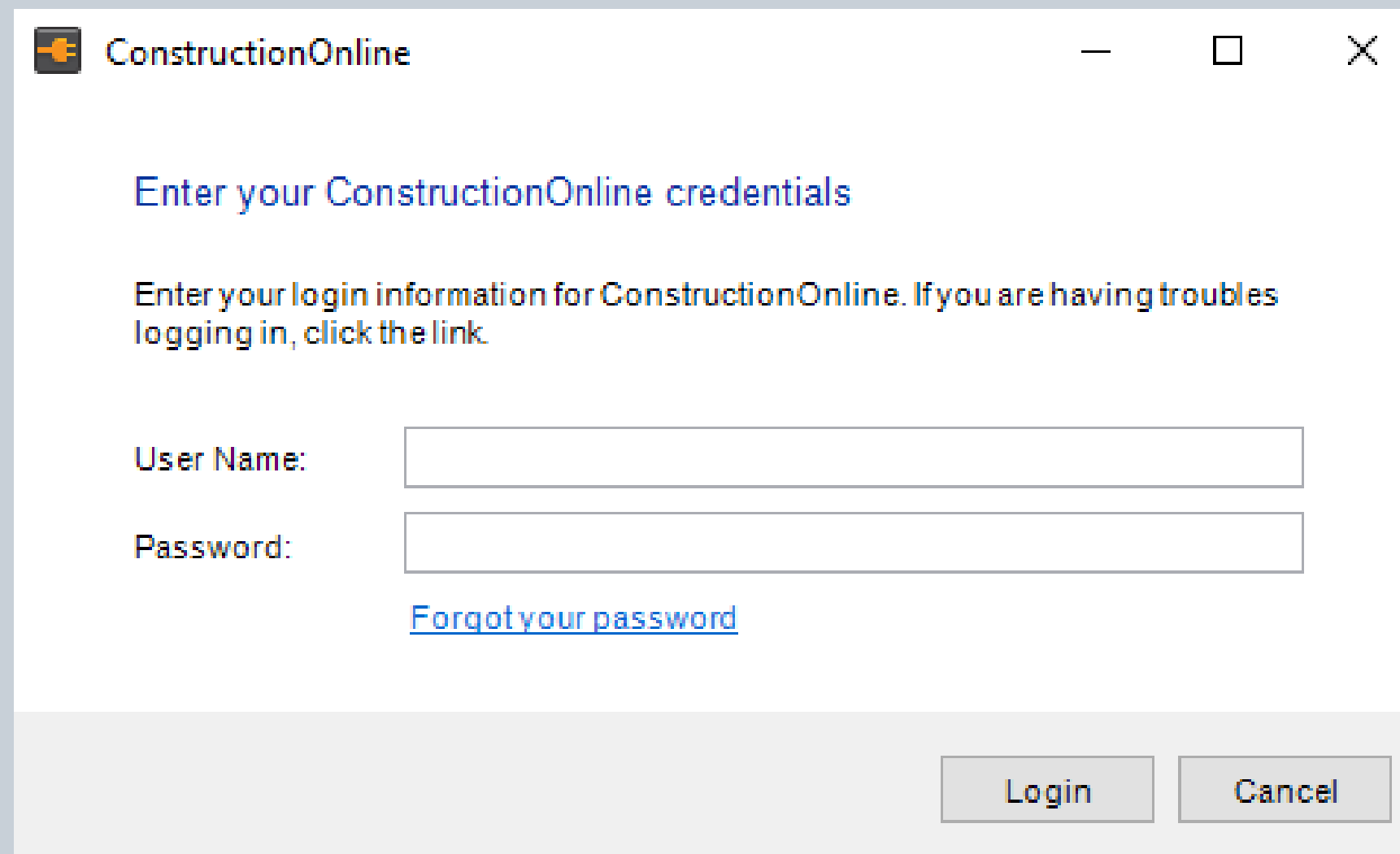
Do you want to run this file?

Name: C:\Users\KDB\Downloads\SocketSetup(1).exe
Publisher: [UDA Technologies, Inc.](#)
Type: Application
From: C:\Users\KDB\Downloads\SocketSetup(1).exe

Run **Cancel**

Step 2: Login to Socket

Once Socket has successfully downloaded, you will be prompted to enter your ConstructionOnline login credentials.



The screenshot shows a standard Windows-style window titled "ConstructionOnline". The window contains the following elements:

- A title bar with the text "ConstructionOnline" and standard minimize, maximize, and close buttons.
- A heading: "Enter your ConstructionOnline credentials".
- A sub-heading: "Enter your login information for ConstructionOnline. If you are having troubles logging in, click the link."
- A "User Name:" label followed by a text input field.
- A "Password:" label followed by a text input field.
- A blue underlined link: "[Forgot your password](#)".
- At the bottom right, two buttons: "Login" and "Cancel".



QuickBooks Integration can only be managed by ConstructionOnline Company Employees and is restricted at certain subscription levels.

Step 3: Integration Settings

We recommend consulting your accountant for this part!

Next, you will be prompted to specify your preferred **QuickBooks Integration Settings**.

The screenshot shows the 'QuickBooks Integration Setup' dialog box. The 'Chart of Accounts' section is highlighted with an orange box and a circled '1'. The 'Items' section is also visible. The 'Revenue Account' section is partially visible at the bottom.

Chart of Accounts

- Use a Parent Account: UDA Costs
- Account Type: Cost of Goods Sold
- Create a single account*
- Create an account for each Category in the estimate
- Create an account for each Category and Subcategory in the estimate

Items

- Use a Parent Item: UDA Items
- Item Type: Service
- Items are used for invoicing

Revenue Account

- Account Name: UDA Construction Payment
- Account Type: Income

QUICKBOOKS INTEGRATION SETUP

To complete the QuickBooks Initial Setup, you will need to be a QuickBooks Admin in Single User mode.

The goal here is to determine how the items from your ConstructionOnline Estimate will be handled in QuickBooks. Since items in QuickBooks need to belong to an account, you must first configure your Chart of Accounts.

We recommended creating a single account (UDA Costs) to store all of your ConstructionOnline items. Using a parent account helps to keep this data organized by providing a specific, separate account in your Chart of Accounts for items coming from ConstructionOnline.

When it comes to the Account Type, the Cost of Goods Sold (COGs) is the most common option selected, however, we recommend consulting your accountant to verify for your company.

QuickBooks Chart of Accounts

OUTGOING ACCOUNTS

QuickBooks Integration Setup

You can create a QuickBooks estimate directly from this ConstructionOnline estimate. With QuickBooks estimates, you can base an invoice off an estimate, add markups, and create reports.

Chart of Accounts

Use a Parent Account

Account Type

Create a single account*

Create an account for each Category in the estimate

Create an account for each Category and Subcategory in the estimate

Items

Use a Parent Item

Item Type

Items are used for invoicing

Revenue Account

Account Name

Account Type



NAME	TYPE
Repairs and Maintenance	Expense
Telephone Expense	Expense
UDA Socket	Expense
Adjustments	Expense
Adjustments	Expense
Appliances	Expense
Appliances	Expense
Bath Hardware	Expense
Bath Hardware	Expense
Cabinetry & Countertops	Expense
Cabinetry & Countertops	Expense
Company Overhead and Margin	Expense
Company Margin	Expense
Company Overhead and Margin	Expense
Contingency	Expense
Other 1	Expense
Other 2	Expense
Construction Clean Up	Expense
Construction Clean Up	Expense
Contract Total	Expense
Door & Closet Hardware	Expense
Door & Closet Hardware	Expense
Electrical Systems	Expense
Electrical Systems	Expense
Ext. Windows & Doors	Expense
Ext. Windows & Doors	Expense
Exterior Areas & Finishes	Expense
Exterior Areas & Finishes	Expense
Exterior Veneer	Expense
Exterior Veneer	Expense
Fireplaces & Trim	Expense
Fireplaces & Trim	Expense
Floorcovering	Expense
Floorcovering	Expense
Foundation	Expense
Foundation	Expense
Framing	Expense
Framing	Expense
HVAC System	Expense
HVAC System	Expense

Step 3: Integration Settings

We recommend consulting your accountant for this part!

QuickBooks Integration Setup

QuickBooks Integration Setup

You can create a QuickBooks estimate directly from this ConstructionOnline estimate. With QuickBooks estimates, you can base an invoice off an estimate, add markups, and create reports.

Chart of Accounts

Use a Parent Account UDA Costs

Account Type Cost of Goods Sold

Create a single account*

Create an account for each Category in the estimate

Create an account for each Category and Subcategory in the estimate

2 **Items**

Use a Parent Item UDA Items

Item Type Service

Items are used for invoicing

Revenue Account

Account Name UDA Construction Payment

Account Type Income

OK Cancel

QUICKBOOKS INTEGRATION SETUP

Next, we'll determine how the items within said account(s) will be handled by QuickBooks.

QuickBooks will create an item for each category and subcategory in the estimate, and all of these items will be associated with the corresponding account.

Using a Parent Item helps to keep your ConstructionOnline Items organized, making them easy to identify, manage, and reference in QuickBooks.

When choosing the Item Type, keeping mind that services are used for services you either charge or purchase, while non-inventory parts are used for good that you buy but do not track.

QuickBooks Items



QuickBooks Integration Setup

You can create a QuickBooks estimate directly from this ConstructionOnline estimate. With QuickBooks estimates, you can base an invoice off an estimate, add markups, and create reports.

Chart of Accounts

Use a Parent Account

Account Type

- Create a single account*
- Create an account for each Category in the estimate
- Create an account for each Category and Subcategory in the estimate

Items

Use a Parent Item

Item Type

Items are used for invoicing

Revenue Account

Account Name

Account Type



Const. Draw	Construction Draw	Service	Construction Income
Retention	Amount of Retainage	Service	Construction Income
UDA Items		Service	UDA Construction Payment
↳ Adjustments	Adjustments	Service	UDA Construction Payment
↳ Appliances	Appliances	Service	UDA Construction Payment
↳ Appliance Labor	Appliance Labor	Service	UDA Construction Payment
↳ Appliances	Appliances	Service	UDA Construction Payment
↳ Total Appliances	Total Appliances	Service	UDA Construction Payment
↳ Bath Hardware	Bath Hardware	Service	UDA Construction Payment
↳ Bath Hardware Labor	Bath Hardware Labor	Service	UDA Construction Payment
↳ Bath Hardware Mate...	Bath Hardware Materials	Service	UDA Construction Payment
↳ Bath Specialties	Bath Specialties	Service	UDA Construction Payment
↳ Mirrors	Mirrors	Service	UDA Construction Payment
↳ Shower Doors	Shower Doors	Service	UDA Construction Payment
↳ Total Bath Hardware	Total Bath Hardware	Service	UDA Construction Payment
↳ Cabinetry & Countertops	Cabinetry & Countertops	Service	UDA Construction Payment
↳ Cabinetry	Cabinetry	Service	UDA Construction Payment
↳ Countertops	Countertops	Service	UDA Construction Payment
↳ Total Cabinetry & Co...	Total Cabinetry & Countertops	Service	UDA Construction Payment
↳ Company Overhead an...	Company Overhead and Margin	Service	UDA Construction Payment
↳ Company Margin	Company Margin	Service	UDA Construction Payment
↳ Company Overhead	Company Overhead	Service	UDA Construction Payment
↳ Contingency	Contingency	Service	UDA Construction Payment
↳ Other 1	Other 1	Service	UDA Construction Payment
↳ Other 2	Other 2	Service	UDA Construction Payment
↳ Total Company Over...	Total Company Overhead and Marg	Service	UDA Construction Payment
↳ Construction Clean Up	Construction Clean Up	Service	UDA Construction Payment
↳ Clean Up - Daily	Clean Up - Daily	Service	UDA Construction Payment
↳ Clean Up - Final	Clean Up - Final	Service	UDA Construction Payment
↳ Total Construction C...	Total Construction Clean Up	Service	UDA Construction Payment

QuickBooks Chart of Accounts

INCOMING REVENUE ACCOUNTS



QuickBooks Integration Setup

You can create a QuickBooks estimate directly from this ConstructionOnline estimate. With QuickBooks estimates, you can base an invoice off an estimate, add markups, and create reports.

Chart of Accounts

Use a Parent Account

Account Type

- Create a single account*
 Create an account for each Category in the estimate
 Create an account for each Category and Subcategory in the estimate

Items

Use a Parent Item

Item Type

Items are used for invoicing

Revenue Account

Account Name

Account Type



Construction in Progress	Other Current Asset
Retainage Receivable	Other Current Asset
Accumulated Depreciation	Fixed Asset
Furniture and Equipment	Fixed Asset
Payroll Liabilities	Other Current Liability
Retained Earnings	Equity
Construction Income	Income
UDA Construction Payment	Income
Other Construction Costs	Cost of Goods Sold
Subcontractors Expense	Cost of Goods Sold
Auto and Truck Expenses	Expense
Bank Service Charges	Expense
Business Licenses and Permits	Expense
Depreciation Expense	Expense
Insurance Expense	Expense

Pro Tip: Work Smarter, Not Harder

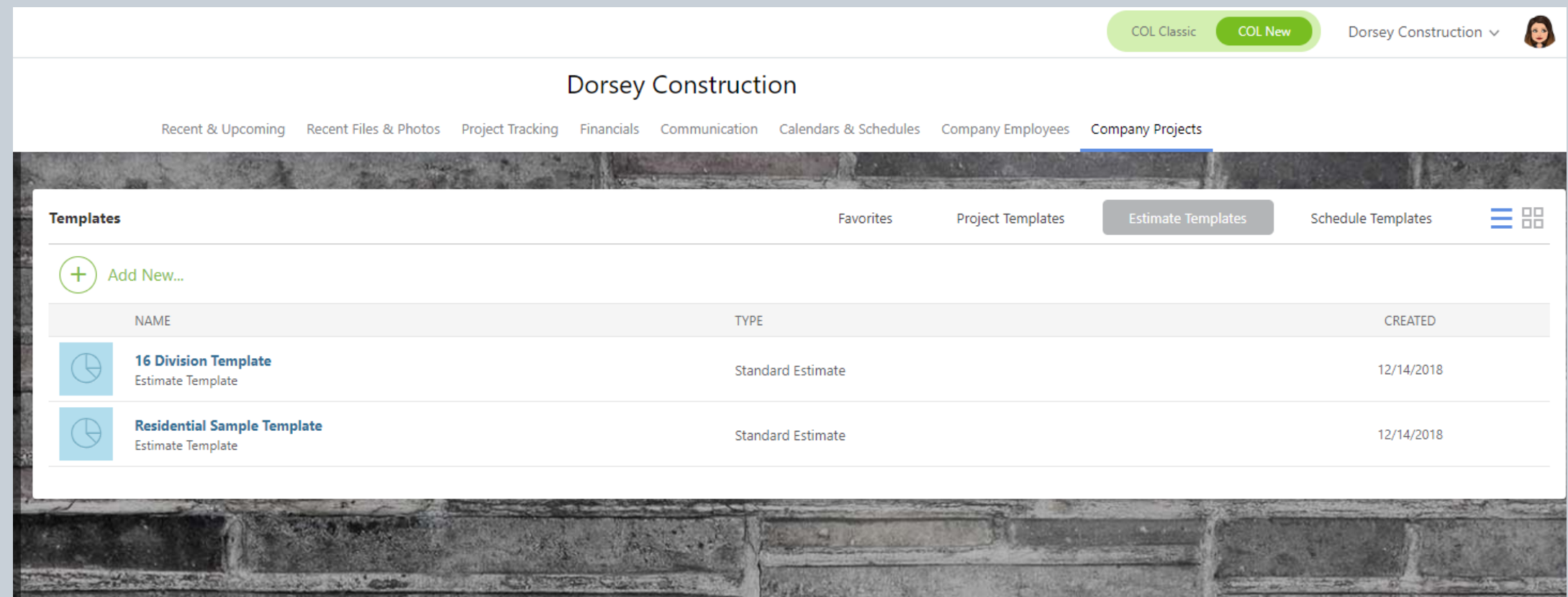
ESTIMATE TEMPLATES

ConstructionOnline gives you the capability to create and save custom Estimate Templates to support the highest quality integration with QuickBooks.



Your QuickBooks Items List will mimic the categories in your ConstructionOnline Estimate(s), and sub-items will mimic the subcategories in your ConstructionOnline Estimate(s).

Using a consistent template ensures the accuracy of the data you are working with, cuts down on the clutter in QuickBooks, and reduces your margin for error.

[Company Overview](#) > [Company Projects](#) > [Templates](#) > [Estimate Templates](#)



The screenshot displays the ConstructionOnline interface for Dorsey Construction. The top navigation bar includes 'COL Classic', 'COL New', and 'Dorsey Construction'. The main navigation menu lists 'Recent & Upcoming', 'Recent Files & Photos', 'Project Tracking', 'Financials', 'Communication', 'Calendars & Schedules', 'Company Employees', and 'Company Projects'. The 'Company Projects' section is active, showing a sub-menu with 'Templates', 'Favorites', 'Project Templates', 'Estimate Templates', and 'Schedule Templates'. The 'Estimate Templates' page features an 'Add New...' button and a table with the following data:

NAME	TYPE	CREATED
 16 Division Template Estimate Template	Standard Estimate	12/14/2018
 Residential Sample Template Estimate Template	Standard Estimate	12/14/2018

02

INTEGRATE

Project Integration + Estimate Information

Once you've activated the connection between ConstructionOnline + QuickBooks, you are able to begin sharing project data.

The Project List in Socket will show all ConstructionOnline Projects - whether or not the project currently has an estimate in ConstructionOnline.

Project with Estimate

Project Information

- Name: Little Residence
- Client: Mister Little
- Created: Wednesday, February 7, 2018
- Modified: Wednesday, November 7, 2018
- [View on ConstructionOnline](#)

Estimate Information

- Name: Little Estimate
- Total Cost: \$348,103.30
- Total Markup: \$0.00
- Company Overhead & Margin: \$195,808.11
- Contract Total: \$543,911.41
- [View on ConstructionOnline](#)

QuickBooks Information

Totals pulled from your ConstructionOnline Estimate populate under Estimate Info in Socket

Arrows point from the Estimate Information section to the QuickBooks Information section.

Project without Estimate

Project Information

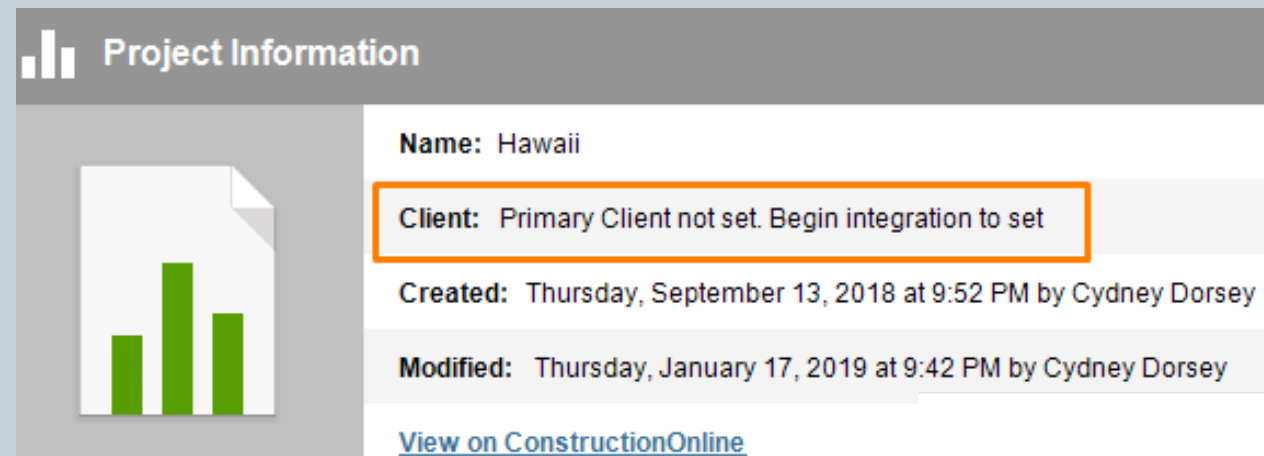
- Name: Halcyon Corporate Center - Building 1
- Client: Primary Client not set. Begin integration to set
- Created: Tuesday, February 5, 2019 at 3:49 PM by Cydney Dorsey
- Modified: Tuesday, February 5, 2019 at 3:49 PM by Cydney Dorsey
- [View on ConstructionOnline](#)

QuickBooks Information

- Actual Cost \$0.00
- Invoiced Amount \$0.00
- Committed Cost \$0.00

Project Integration: Assigning a QuickBooks Customer

A ConstructionOnline ClientLink Contact is required for project integration with QuickBooks. The ClientLink Contact serves as the QuickBooks Customer for the job.



Project Information

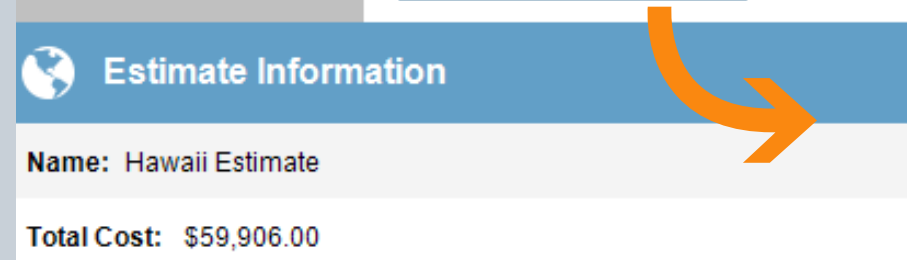
Name: Hawaii

Client: Primary Client not set. Begin integration to set

Created: Thursday, September 13, 2018 at 9:52 PM by Cydney Dorsey

Modified: Thursday, January 17, 2019 at 9:42 PM by Cydney Dorsey

[View on ConstructionOnline](#)

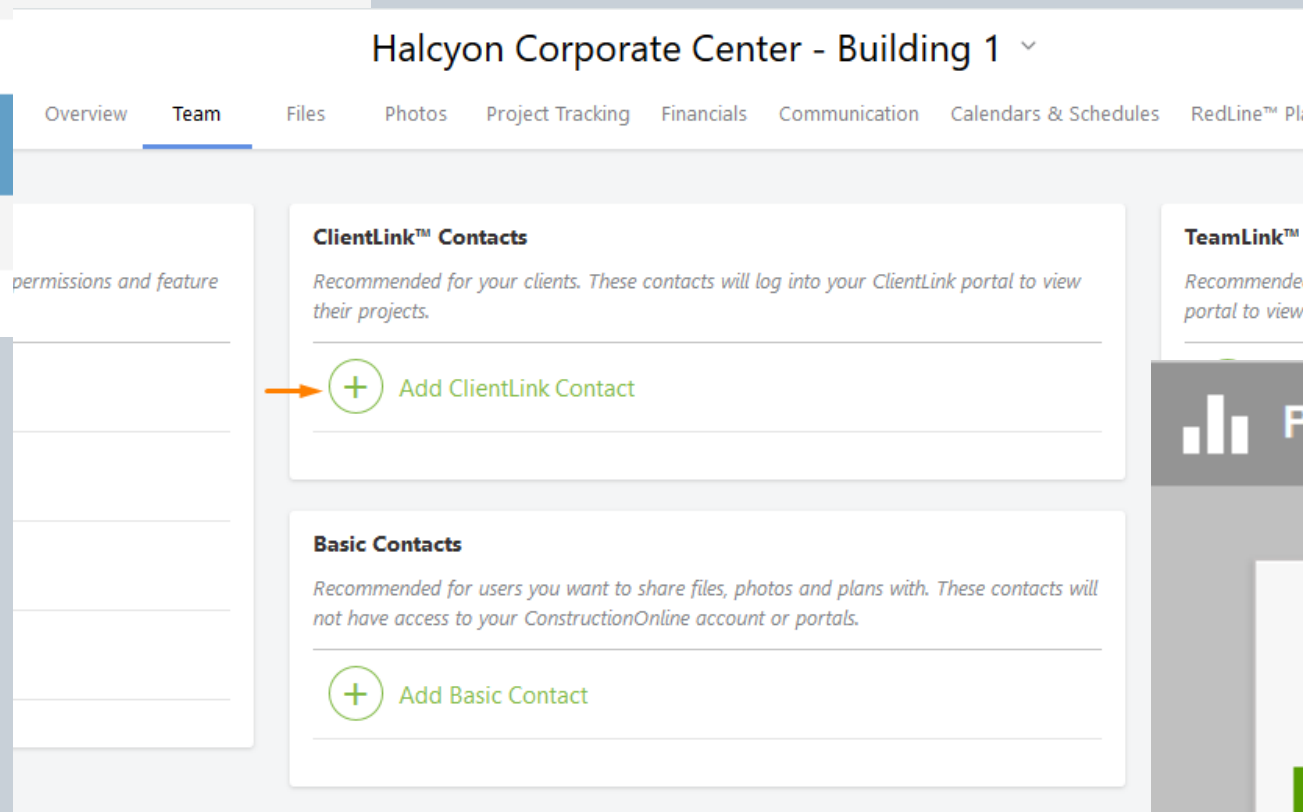


Estimate Information

Name: Hawaii Estimate

Total Cost: \$59,906.00

If your project doesn't currently have a ClientLink Contact assigned, you will see the message **Primary Client Not Set** in Socket.



Halcyon Corporate Center - Building 1

Overview **Team** Files Photos Project Tracking Financials Communication Calendars & Schedules RedLine™ Plans

ClientLink™ Contacts
Recommended for your clients. These contacts will log into your ClientLink portal to view their projects.

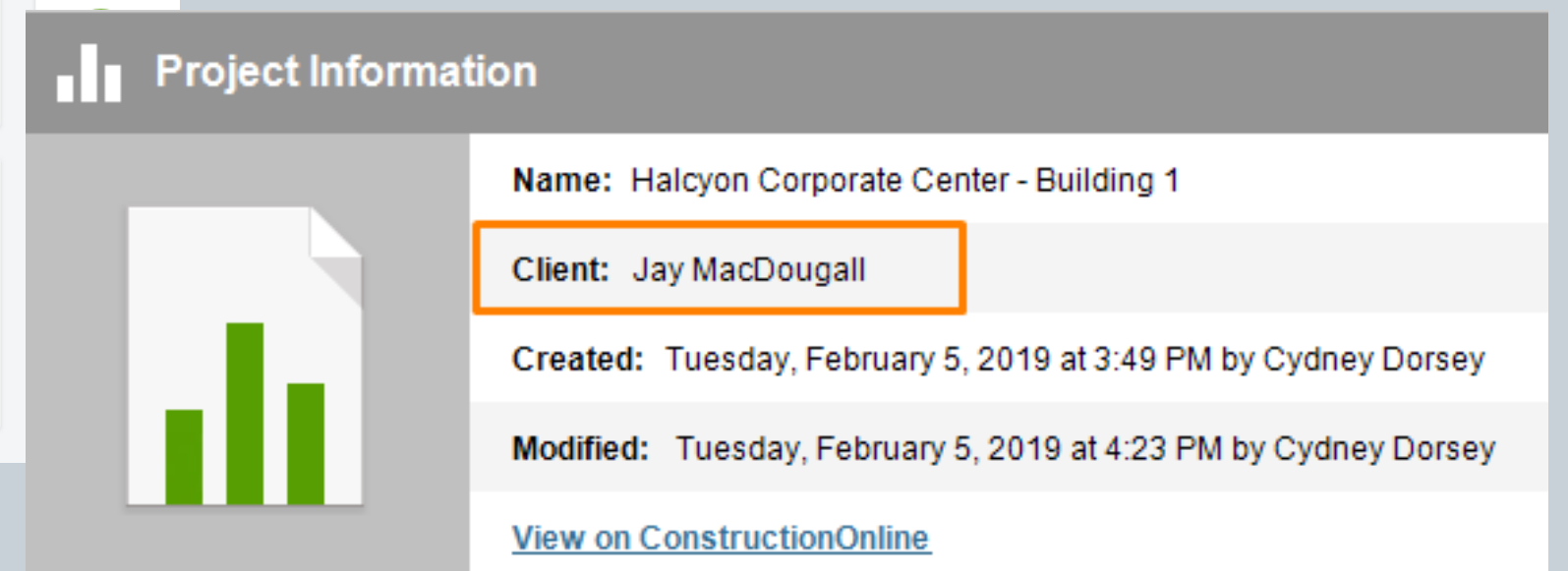
TeamLink™
Recommended portal to view

Basic Contacts
Recommended for users you want to share files, photos and plans with. These contacts will not have access to your ConstructionOnline account or portals.

[+ Add ClientLink Contact](#)

[+ Add Basic Contact](#)

To assign a ClientLink Contact to the project, view the project on ConstructionOnline. From the Team Tab, choose Add ClientLink Contact.



Project Information

Name: Halcyon Corporate Center - Building 1

Client: Jay MacDougall

Created: Tuesday, February 5, 2019 at 3:49 PM by Cydney Dorsey

Modified: Tuesday, February 5, 2019 at 4:23 PM by Cydney Dorsey

[View on ConstructionOnline](#)

Once your project has a ClientLink Contact assigned, you will see the Contact Name displayed in Socket as **Client**.

Pro Tip: Keep It Simple!

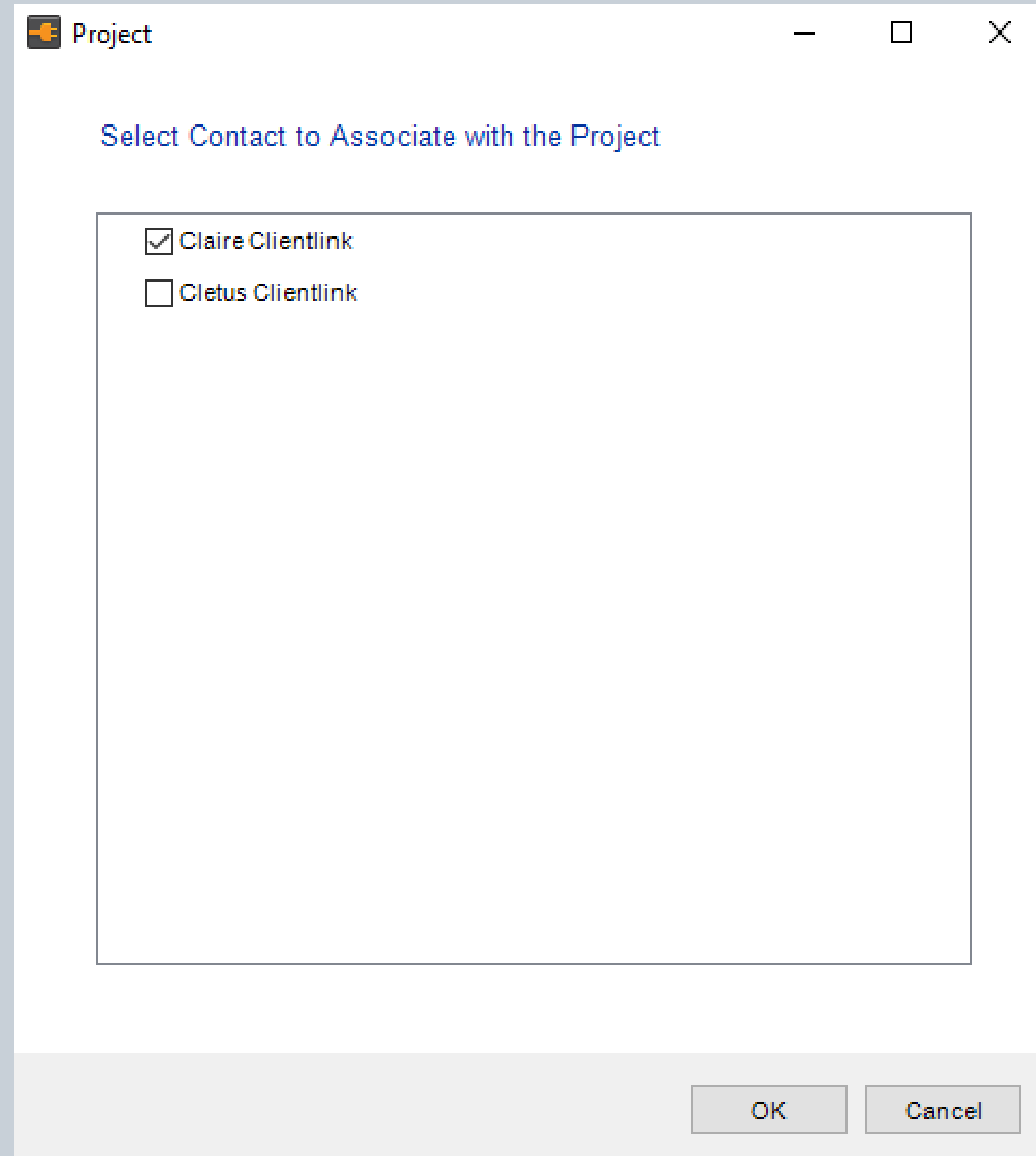
QUICKBOOKS PRIMARY CUSTOMER

While ConstructionOnline allows for multiple ClientLink Contacts to be assigned to a project, QuickBooks requires a single **Primary Customer**.

If you have multiple ClientLink Contacts assigned to the project in ConstructionOnline, you may also see the **Primary Client Not Set** message displayed for your project in Socket.

To fully engage with QuickBooks, you will have to select a primary customer when integrating with QuickBooks.

Socket will allow for you to choose from the existing ConstructionOnline ClientLink Contacts on the project.



Project

Select Contact to Associate with the Project

Claire Clientlink

Cletus Clientlink

OK Cancel

Project Integration: Create

Now, you are ready to create estimates, invoices, and purchase orders in QuickBooks with your ConstructionOnline data via Socket.

The screenshot displays the 'Socket for ConstructionOnline' interface. At the top, there is a 'File' menu and a 'QuickBooks' tab. Below this, a toolbar contains several icons: 'QuickBooks Initial Setup', 'Create Estimate', 'Create Invoice', 'Create Purchase Order', 'Import From QuickBooks', and 'Reload Data'. The 'Create Estimate', 'Create Invoice', and 'Create Purchase Order' icons are highlighted with an orange border. The main content area is divided into two sections: 'Project Information' and 'Estimate Information'. The 'Project Information' section shows details for 'Halcyon Corporate Center - Building 1', including the client 'Jay MacDougall' and creation/modification dates. The 'Estimate Information' section shows details for 'Halcyon Corporate Center - Building 1 Estimate', including a total cost of \$250,651.00 and a contract total of \$250,651.00. A sidebar on the left lists various projects, with 'Halcyon Corporate Center - Building 1' selected. The bottom of the interface features a green bar with the QuickBooks logo and the text 'QuickBooks Information'.

Socket for ConstructionOnline

File QuickBooks

QuickBooks Initial Setup

Create Estimate

Create Invoice

Create Purchase Order

Import From QuickBooks

Reload Data

Projects

- Alabama
- Bigg Residence
- Halcyon Corporate Center - Building 1
- Halcyon Corporate Center - Building 2
- Hawaii
- Little Residence
- Medium Residence
- New Employee Onboarding 1111
- Residential Demo Project MF
- Residential Demo Project SF
- UDA Custom Apps
- UDA Technologies: Success Program

Project Information

Name: Halcyon Corporate Center - Building 1

Client: Jay MacDougall

Created: Tuesday, February 5, 2019 at 3:49 PM by Cydney Dorsey

Modified: Tuesday, February 5, 2019 at 9:27 PM by Cydney Dorsey

[View on ConstructionOnline](#)

Estimate Information

Name: Halcyon Corporate Center - Building 1 Estimate

Total Cost: \$250,651.00

Total Markup: \$0.00

Company Overhead & Margin: \$0.00

Contract Total: \$250,651.00

[View on ConstructionOnline](#)

QuickBooks Information

Project Integration: Create

ESTIMATE

Create a QuickBooks Estimate

QuickBooks estimate directly from this ConstructionOnline estimate. With QuickBooks estimates, you can base an invoice off an estimate, add markups, and create reports.

Select Estimate or Change Order
Base Estimate

Include Markup

Company Overhead & Margin

Separate Category

Prorated into each line item

Line Item Markups

Include Markup in QuickBooks rate for each item

Additional Options

Include Selections

OK Cancel

When creating QuickBooks Estimates via Socket, you'll find options to include Company Overhead & Margin, Line Item Markups, & Selections.

INVOICE

Create a QuickBooks Invoice

You can create a QuickBooks invoice directly from this Construction Online estimate. With QuickBooks invoices, you can keep track of how much a customer owes you, take payments in advance, and apply discounts or markups to item prices.

Include in Invoice

Select Estimate or Change Order
Base Estimate

Choose the areas of the estimate to invoice

Click to make selection(s)

Progress Invoicing

Invoice for 100%

Invoice for a percentage of the work completed

Percent of Estimate 10

Include Markup and Retainage

Company Overhead & Margin

Separate line items

Prorated into each line item

Line Item Markups

OK Cancel

QuickBooks Invoices can be created for ConstructionOnline Estimates or Change Orders via Socket. Socket does support Progress Invoicing options as well.

PURCHASE ORDER

Create a QuickBooks Purchase Order

You can create a QuickBooks purchase order from this UDA estimate. With QuickBooks purchase orders, you can order goods and services, keep track of what you have ordered and received, and pay vendors.

Select Estimate or Change Order
Base Estimate

Filter by Estimate Framework

Click to make selection(s)

Filter by Resource

Filter by Classification

Select a QuickBooks Vendor
Vicky Vendor

Include Line Item Markup

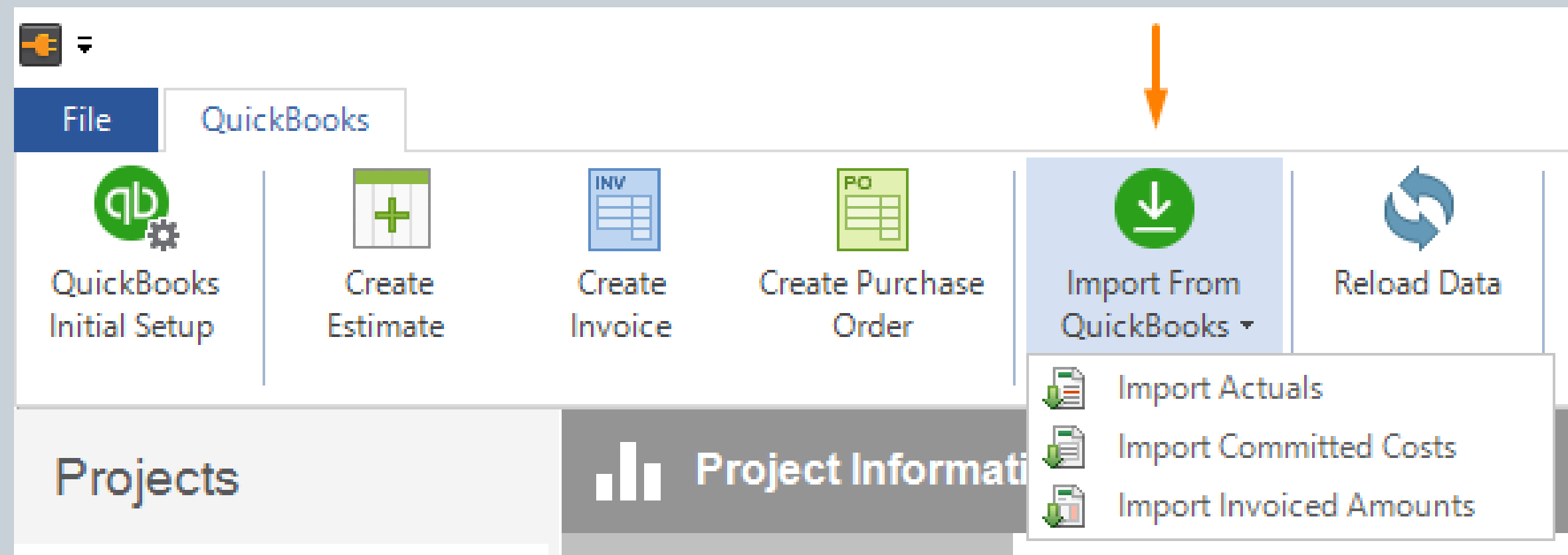
OK Cancel

Purchase Orders can be created from Estimates or Change Orders via Socket also. You can filter the POs by specific categories/subcategories, resources, or classification.

Project Integration: Import

You are also able to import data from QuickBooks to ConstructionOnline via Socket.

To successfully import data from QuickBooks, it must be referencing the jobs, customers, vendors, and items that correspond with your ConstructionOnline Estimate.



Options for QuickBooks Imports can be accessed from the menu in Socket entitled [Import from QuickBooks](#).

Project Integration: Import

ACTUALS

INVOICED AMOUNTS

Import Invoices from QuickBooks

Select the type of invoices you would like to import

All Invoices

Only Paid Invoices

Only Unpaid Invoices

OK Cancel

Invoiced Amounts can include Paid & Unpaid amounts from QuickBooks Invoices.

Import Actual Costs from QuickBooks

You can calculate actual costs two ways: manually enter actual costs, or import them from QuickBooks.

NOTE: This will overwrite all current QuickBooks actuals in the estimate. Any actual costs entered manually will still be available by toggling off QuickBooks Actuals.

Include Checks

All Checks

Only Printed Checks

Only Unprinted Checks

Include Bills

All Bills

Only Paid Bills

Only Unpaid Bills

Include Credit Card Charges

Include Paychecks

Generate a Custom Transaction Report in QuickBooks

OK Cancel

Actuals are your expenses documented in QuickBooks, including Checks, Bills, Credit Card Charges, & Paychecks.

COMMITTED COSTS

Import Purchase Orders from QuickBooks

Please select the type of purchase orders you would like to import

All Purchase Orders

Open Purchase Orders

Include Partially Unreceived Quantity

Closed Purchase Orders

Include Partially Received Quantity

OK Cancel

Committed Costs represent your Purchase Orders in QuickBooks.

Pro Tip: Check Yourself!

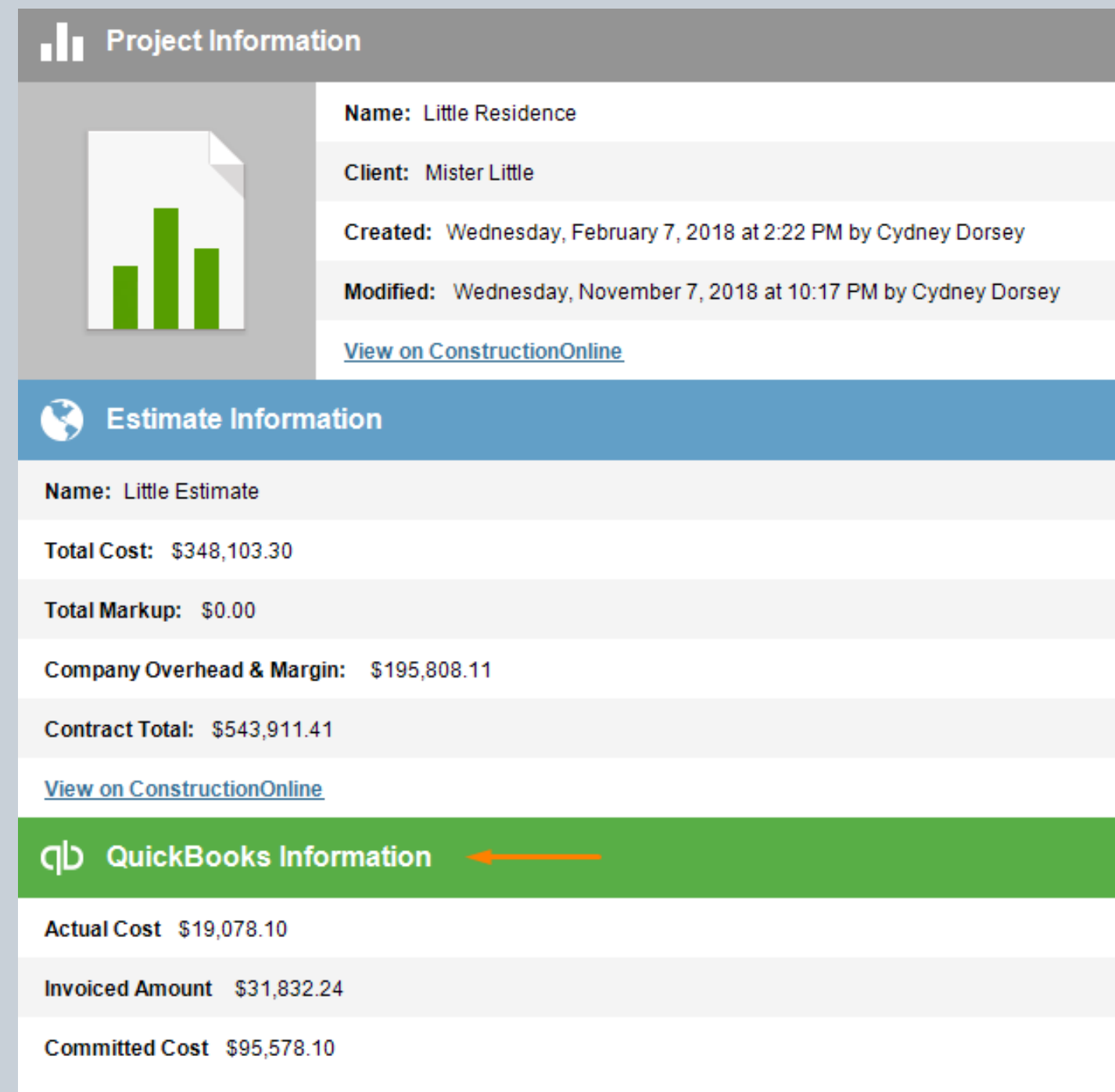
When importing Actuals from QuickBooks, Socket will give you the option to **Generate a Custom Transaction Report in QuickBooks.**

This helps you verify your transactions are accurately recorded in both QuickBooks and ConstructionOnline, and can help to identify errors that could prevent data from importing to ConstructionOnline as expected, such as an mismatched name.

Custom Transaction Detail Report						
All Transactions						
Item	Amount	Name	Paid	Type	Num	
Service						
UDA Items						
Foundation						
Concrete Slab Labor						
UDA Item...	-510.00	Mister Little:Little R...	Unpaid	Bill		
Total C	-510.00					
Concrete Slab Materials						
UDA Item...	-1,588.40	Mister Little:Little R...	Unpaid	Bill		
Total C	-1,588.40					
Footers Labor						
UDA Item...	-1,120.00	Mister Little:Little R...	Unpaid	Bill		
Total F	-1,120.00					
Footers Materials						
UDA Item...	-2,196.20	Mister Little:Little R...	Unpaid	Bill		
Total F	-2,196.20					
Foundation-Misc						
UDA Item...	-705.00	Mister Little:Little R...	Unpaid	Bill		
Total F	-705.00					
Foundation Labor						
UDA Item...	-2,320.00	Mister Little:Little R...	Unpaid	Bill		
Total F	-2,320.00					
Foundation Materials						
UDA Item...	-7,438.50	Mister Little:Little R...	Unpaid	Bill		
Total F	-7,438.50					
Site Work						
UDA Item...	-3,200.00	Mister Little:Little R...	Unpaid	Bill		
Total S	-3,200.00					
Total Fou	-19,078.10					
Total UDA It	-19,078.10					
Total Service	-19,078.10					
TOTAL	-19,078.10					

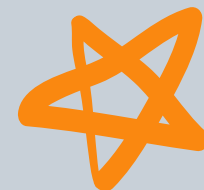
Project Integration + QuickBooks Information

Once you've imported actuals, committed costs, and/or invoiced amounts from QuickBooks, you'll be able to see that data displayed in Socket right alongside your Estimate Information from ConstructionOnline.



The screenshot displays a software interface with three main sections:

- Project Information:** Includes a bar chart icon and details for 'Little Residence' (Client: Mister Little, Created: Wednesday, February 7, 2018 at 2:22 PM by Cydney Dorsey, Modified: Wednesday, November 7, 2018 at 10:17 PM by Cydney Dorsey). A link 'View on ConstructionOnline' is present.
- Estimate Information:** Includes a globe icon and financial details for 'Little Estimate': Total Cost: \$348,103.30, Total Markup: \$0.00, Company Overhead & Margin: \$195,808.11, Contract Total: \$543,911.41. A link 'View on ConstructionOnline' is present.
- QuickBooks Information:** A green header section with a QB icon and an orange arrow pointing to it. It lists: Actual Cost \$19,078.10, Invoiced Amount \$31,832.24, and Committed Cost \$95,578.10.



Project Integration + QuickBooks Information

You will also see this data displayed in ConstructionOnline Estimating.

Column View: Job Costing							
BASE COST	STATUS	RESOURCE	ADJUSTMENT	CO COST	ADJUSTED COST	QB ACTUALS	QB COMMITTED
\$ 104,580.00			\$ 0.00	\$ 0.00	\$ 104,580.00	\$ 0.00	\$ 76,500.00
\$ 3,200.00	Estimated		\$ 0.00	\$ 0.00	\$ 3,200.00	\$ 3,200.00	\$ 3,200.00
\$ 1,120.00	Estimated		\$ 0.00	\$ 0.00	\$ 1,120.00	\$ 1,120.00	\$ 1,120.00
\$ 2,196.20	Estimated		\$ 0.00	\$ 0.00	\$ 2,196.20	\$ 2,196.20	\$ 2,196.20
\$ 2,320.00	Estimated		\$ 0.00				
\$ 7,438.50	Estimated		\$ 0.00				
\$ 510.00	Estimated		\$ 0.00				
\$ 1,588.40	Estimated		\$ 0.00				
\$ 705.00	Estimated		\$ 0.00				
\$ 19,078.10			\$ 0.00				

Column View: Invoicing						
NAME	CONTRACT PRICE	CO PRICE	TOTAL PRICE	QB INVOICED	BALANCE	
Planning						
Total: Planning	\$ 104,580.00	\$ 0.00	\$ 104,580.00	\$ 15,300.00	\$ 104,580.00	
Foundation						
Site Work	\$ 3,200.00	\$ 0.00	\$ 3,200.00	\$ 640.00	\$ 3,200.00	
Footers Labor	\$ 1,120.00	\$ 0.00	\$ 1,120.00	\$ 224.00	\$ 1,120.00	
Footers Materials	\$ 2,196.20	\$ 0.00	\$ 2,196.20	\$ 439.24	\$ 2,196.20	
Foundation Labor	\$ 2,320.00	\$ 0.00	\$ 2,320.00	\$ 464.00	\$ 2,320.00	
Foundation Materials	\$ 7,438.50	\$ 0.00	\$ 7,438.50	\$ 1,487.70	\$ 7,438.50	
Concrete Slab Labor	\$ 510.00	\$ 0.00	\$ 510.00	\$ 102.00	\$ 510.00	
Concrete Slab Materials	\$ 1,588.40	\$ 0.00	\$ 1,588.40	\$ 317.68	\$ 1,588.40	
Foundation-Misc	\$ 705.00	\$ 0.00	\$ 705.00	\$ 141.00	\$ 705.00	
Total: Foundation	\$ 19,078.10	\$ 0.00	\$ 19,078.10	\$ 3,815.62	\$ 19,078.10	

03

ENJOY

Sit back & relax - it's time to reap the benefits of ConstructionOnline's powerful QuickBooks integration!

Ultimate Construction Financial Management



“ *The magic of ConstructionOnline™ QuickBooks Integration - makes my job so simple. Has everything I need to get my job done!* ”

Greg Hardwick
P.E., President and Owner



ESTIMATING + JOB COSTING

ConstructionOnline Estimating & Job Costing gives you the tools you need to create fast, accurate estimates and track your financial progress from start to finished.

CHANGE ORDER MANAGEMENT

With the power to create detailed change orders, including costs, additional time considerations, notes, related images, and more, ConstructionOnline Change Order Management offers clear advantages.

CLIENT SELECTIONS

With Client Selections in ConstructionOnline, you can quickly create option sets via a simple web interface to keep clients involved and satisfied.