



Pre-integration setup guide and directions to complete prior to the assisted integration call or before using the Contractor Foreman (CF) QuickBooks Online (QBO) Integration Guide

***IMPORTANT!** Read Carefully and follow each step thoroughly before attempting to move forward or before scheduling an integration, **please read this checklist and watch the attached videos**  to clarify you have taken these steps to ensure a successful integration.

Optional Resources:- [Free mappable cost codes templates to use and modify as you wish.](#) 

(Free templates are the same as those shown in video)

Recommended for integration success: (click) [How Cost Codes work with QBO Reporting Webinar](#) (58 mins) 

Step 1 Instructions: Decide on which cost codes to use: Video: CF Integration Cost Codes Setup

Decide which Cost Codes you will use from which system.

-  Using **QuickBooks Online (QBO) Products & Services** (Go to Option 1)
-  Using **Contractor Foreman (CF) Cost Codes** (Skip option 1, Go to Option 2)

Option 1: If you use QB Online Products and Services as your cost codes. Make sure they are structured correctly before our integration meeting to avoid delays. (Review video on cost codes)

****Export any cost items (Materials, Equipment, Labor, etc..) to CF cost items database****

- ☐ ☒ **Assign every Product & Service in QBO to a Category**
- ☐ ☒ **Make inactive unused Products & Services**
- ☐ ☒ **Make sure Contractor Foreman has no cost codes that will conflict with your QuickBooks cost codes.**

Recommended: Have all archived/active codes in CF deleted (request deletion in writing by emailing Contractor Foreman support@contractorforeman.com from the CF Main Admin's email)

If Complete Initials_____

Option 2: Clean Up Contractor Foreman (if using CF codes)

- ☒ If new to using cost codes and any demo/unwanted cost codes exist in CF. Request CF support to delete all cost codes (active & archived)

→ How to Delete archived/active cost codes in CF (request deletion in writing by emailing CF support@contractorforeman.com from the primary contact's (Main Admin) email.

If Complete Initials_____

- ☒ If using your own cost codes already created in CF. Make sure they are structured as explained in the step 1 video above)
- ☒ Import new codes via .csv (if using the import template or SBS extended templates)
- ☒ Ensure cost codes are expanded to cover all item types (optional but recommended if using cost codes on Expenses and Bills in Contractor Foreman)
- ☒ Make sure QBO has no conflicting cost codes (Batch inactivate all Products and Services prior to integration) Export any cost items to CF cost items database.

Step 2: Prepare Directories Video: Setting up Records Correctly

- ☒ Match the spelling & formatting of employees, vendors, customers across QBO & CF
- ☒ No third-tier customers in QBO — only first-tier main customers, second tier sub customers (projects) only
- ☒ Ensure sub-customers in QBO are set as “Projects” (not main-level customers)

If Complete Initials_____

Step 3: Prepare Projects Video: Setting Up Current Projects to Sync.

- ☒ Current open projects in QB Online should be setup as sub-customers or already in the “Projects” module of QuickBooks
- ☒ Convert these sub customers to Projects in QBO's “Projects” module
- ☒ Link existing QBO projects to CF during integration

