Before going live

1. **Update QBDT:**

- Calling into support to update existing QBDT

2. **Sync between Quickbooks and IFSM: 1 hr**

- Configuring settings in IFSM to allow the sync, going through all general settings in QuickBooks to link IFSM and QuickBooks.

- Taking a merchant application for Intuit merchant services.

3. **Merchant setup between IFSM and QuickBooks: 1 hr**

- Going through your welcome letter email from Intuit Business Services to setup your merchant account with Intuit. If necessary, we will call Intuit merchant during this time.

- Linking merchant account on all other users computers

- Configuring your payment settings in IFSM.

- Linking your Intuit Merchant account with your QuickBooks company file.

- Editing your payment settings under preferences in QuickBooks.

4. **Setup of IFSM and Office Training: 1.5 hrs**

   Setup

- Adding all login and non-login users to IFSM, editing all alert settings. Adding technicians to the Dispatch Board.

- Updating your subscription details, work order numbers, hours of operation and time zone preferences.

- Adding your company services.

- Adding your logo, selecting an invoice template and adding any custom fields.

- Building "Invoice with Payment or Non-Payment"report.

- Running a test sync with a test customer between IFSM and QuickBooks.

5. **Setup of IFSM and Office training: 2 hours**

- Download mobile app on office managers phone and add them as a mobile user and send them a test work order and go through taking a payment, teamwork and creating a work order.

- How to create a work order from the Work Order tab or the Customer Tab.

- Adding New Customers

- How to verify and properly edit customer information when creating a work order.

- Discussing the All Work Orders view in the Dispatch board, Pending view, the Unassigned view, the Needs to be Scheduled View and the Completed View.

- Discussing filter from Pending View

- Using the Dispatch Board. Discussing promised arrival time and estimated duration fields.

- Where to locate Service History.

- Forcing a work order through.

6. **Technician training on IFSM app 1.5 hrs**

- Putting an Android or Apple device on the computer screen: Going through two work order scenarios: *Not taking a payment* on site and *taking a payment* on site.

   The technicians will learn and follow along using an Android or Apple device:

- Getting to the customers address.

- Calling the customer.

- Updating their Status on the work order.

- Adding Equipment and Equipment attributes.

- Accessing the Service History and Equipment history.

- Taking Photos.

- Making Internal Notes.

- Setting a Flag and discussing communication with the office.

- Taking payment, taking a signature and sending a payment receipt with the Invoice.

- If have on call technicians how to create a work order.

After going live

7. **Office Training 1.5 hours**

- Protocol for Clearing a Flag on a Completed or Non-Completed work order.

    Invoicing

- Reviewing the Completed work orders to approve them.

- Changing the filters on the Completed work order view to "Today" and "Yesterday" to export invoices 2x daily to QuickBooks.

- Running the "Invoice with Payment or Non-Payment" report 1x daily for invoices that were exported to QuickBooks.

- Discussing who will be responsible for running the sync and what that entails.

- Setting up level 2 support for additional computers to be added for syncs

8. **Time Card Module and Service Agreement Module training: 1 hr**
   Time Card Module

- Reviewing how to approve time in IFSM and if doing payroll in QuickBooks how to bring it to the weekly time sheet in QuickBooks.

Service Agreement Module

- Creating Preventative Maintenance agreements in IFSM.

9. **Technician Training 1 hr**

- Reviewing proper work flow for two work order scenarios: *accepting payment on site* and *not accepting payment on site*.

- Q&A with technicians.

    Total: $1,300 *I will record all training sessions and send them to you after each session.