



## **Before going live**

### **1. Sync between Quickbooks and IFSM: 1 hr \$150**

- 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.

### **2. Merchant setup between IFSM and QuickBooks: 1 hr \$100**

- 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.
- Configuring your payment settings in IFSM.
- Linking your Intuit Merchant account with your QuickBooks company file.
- Editing your payment settings under preferences in QuickBooks.

### **3. Setup of IFSM and Office Training: 1.5 hrs: \$225**

#### **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 two reports: "Work order by Technician" and "Invoice with Payment or Non-Payment".
- Running a test sync with a test customer between IFSM and QuickBooks.

## **Office Training**

- 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.
- Using the Dispatch Board.
- Where to locate Service History.
- Forcing a work order through.

### **4. Technician training on IFSM app 1.5 hrs: \$150**

- 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**

### **5. Office Training 1.5 hours: \$225**

- Running a “Work Order by Technician” report.
- 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.

### **6. Time Card Module and Service Agreement Module training: 1 hr: \$100**

#### **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.

### **7. Technician Training 1 hr: \$100**

- Reviewing proper work flow for two work order scenarios: *accepting payment on site* and *not accepting payment on site*.
- Q&A with technicians.

**Total: \$1,050** \*I will record all training sessions and send them to you after each session.