

QuickBooks Project Management Apps... **Evaluation Worksheet**



*Brought to
you by...*



**EVALUATION WORKSHEET:
CONSTRUCTION PROJECT MANAGEMENT SOFTWARE**

Software to Evaluate:	Y=Yes	N=No	Notes
Your construction company type:			
Future vision for your company:			
Are you looking for a "specific needs" package? (If yes, what are those needs?)			
Are you looking for an "all-in-one" package?			

Define your biggest needs
(Tip: Ask and discuss with different members of your team)

Biggest need #1?			
Biggest need #2?			
Biggest need #3?			
Biggest need #4?			
Biggest need #5?			

Integration with accounting software

QuickBooks – general:

BIG "UP-FRONT" TIP!

Establish desired cost codes and keep them consistent between QuickBooks and your Project Management Software
Not looking to integrate yet? Follow the BIG TIP above.
(If you decide to integrate in the future, you will save yourself a boatload of integration transition work !)

QuickBooks Desktop

Investigate and understand WebConnector limitations			
---	--	--	--

QuickBooks Online

Includes a "Diagnostic Dashboard" to show real-time connection status			
---	--	--	--

**EVALUATION WORKSHEET:
CONSTRUCTION PROJECT MANAGEMENT SOFTWARE**

Software to Evaluate:	Y=Yes	N=No	Notes
------------------------------	-------	------	-------

Where is data stored?

In-house server?			
Hosted server? (Check compatibility with + charges from hosting company)			
Cloud-based (Any storage fees?)			

Who will be using it?

Acceptance or Resistance to Change?

Management (e.g., Owners, Project Managers)			
Financial (accountants, bookkeeping)			
Employees			
Vendors			
Customers			

Communication modes

Mobile (phones, tablets)

Apple			
Android			
Additional investment required?			

Desktop computers

Windows			
Mac			

Crossover and compatibility with other third-party apps you use?

Do they "play nicely" with each other? Or might there be issues?			
--	--	--	--

**EVALUATION WORKSHEET:
CONSTRUCTION PROJECT MANAGEMENT SOFTWARE**

Software to Evaluate:	Y=Yes	N=No	Notes
------------------------------	-------	------	-------

Capabilities

Job (cost) codes			
Planning and scheduling process (Gantt Charts, interactive modifications)			
Shared calendar			
Estimates			
Change Orders			
Purchase Orders			
Item Receipts			
Bills			
Payments to Vendors			
Lienwaivers			
Credit Card Purchases			
Progress Tracking			
Invoicing			
Payments from Customers			
Equipment Management			
Construction Materials and Inventory management			
Document management, storage, and access			
Lead tracking or CRM (Customer Relationship Management) System			
Vendor Portal			
Customer Portal			

**EVALUATION WORKSHEET:
CONSTRUCTION PROJECT MANAGEMENT SOFTWARE**

Software to Evaluate:	Y=Yes	N=No	Notes
-----------------------	-------	------	-------

Capabilities (continued)

Document signatures for

Customers			
Vendors			

Time Tracking and assigning estimated Payroll costs

Only when connected to software			
Stored offline until connected to software			
Scheduling features			
GPS?			
Geofencing?			
Estimated Payroll costs allocated to job cost reports			

Changes to Lists and Transactions

One way synch with accounting software as set up			
Two-way synch with accounting software as changes occur			

Frequency of "current status" updates

Continuous synching?			
On-demand synching?			
Pre-set times (e.g., hourly, daily, etc.)?			

Data integrity

Security options (logins, access to information, etc.)			
Error reporting and recovery			

**EVALUATION WORKSHEET:
CONSTRUCTION PROJECT MANAGEMENT SOFTWARE**

Software to Evaluate:	Y=Yes	N=No	Notes
------------------------------	-------	------	-------

Support

Support mode (e.g., person-to-person, chat, email, etc.)			
Support accessibility (e.g., hours of operation)			
Responsiveness to user suggestions			

Reporting

Excluding company financial reports you expect to see from your accounting software, what are the Top 5 construction reports you want and need to see?

Top report #1			
Top report #2			
Top report #3			
Top report #4			
Top report #5			

Ease of Implementing (think potential hours and who will be in charge)

Fast and Easy			
Moderate			
Complex			

Ability to customize:

Low			
Medium			
High			

**EVALUATION WORKSHEET:
CONSTRUCTION PROJECT MANAGEMENT SOFTWARE**

Software to Evaluate:	Y=Yes	N=No	Notes
------------------------------	-------	------	-------

Training resources

Online tutorials?			
Live online classes or webinars?			
Off-site training?			
System documentation?			

Training time (potential hours required)

Management (e.g., Owners, Project Managers)			
Financial (accountants, bookkeeping)			
Employees			
Vendors			
Customers			

Other users

Number of current users			
# Favorable reviews (and notes)			
# Unfavorable reviews (and notes)			

**EVALUATION WORKSHEET:
CONSTRUCTION PROJECT MANAGEMENT SOFTWARE**

Software to Evaluate:	Y=Yes	N=No	Notes
------------------------------	-------	------	-------

Pricing

Free trial option? Length?			
Refund option?			
Commitment? (e.g., month-to-month start/stop vs. longer commitment)			
Upfront fees			
Modular pricing? If yes, which modules meet your needs?			

Ongoing fees

Fees are based on _____			
Anticipated annual cost			

Anticipated annual benefit

Documentation			
Standardized procedures			
Communications - internal			
Communicatioins - external			
Customer perception regarding professionalism			
Decision-making information at hand			
Avoiding the cost of lost and wasted time			
Reduced stress			

About Lien waivers:

<https://www.investopedia.com/terms/l/lien-waiver.asp>

For a list of QuickBooks-compatible apps, access this link:

<https://quickbooks.intuit.com/app/apps/search/?searchTerm=construction&queryID=87e9bd534b293eeacc2c75945efff6b0>

Check out these *Better Numbers – Better Business* videos:

- [JobTread \(project management\)](#)
- [BuildTools \(project management\)](#)
- [MakersHub \(AI-based data entry\)](#)
- [Busybusy \(time tracking\)](#)

Additional Job Cost and Accounting Resources from Info Plus Accounting

Accounting Lessons and Tutorials

Is your company losing out because the advanced features you need are buried somewhere in QuickBooks or Enterprise Solutions? Take a closer look at our accounting lessons where you'll learn how to structure your system, enter transactions, and create the reports that can make a REAL difference in your financial results!

Online Training for QuickBooks

[Subscription Program \(CAMP\)](#)

When you become a member of our Construction Accounting & Manufacturing Program (CAMP) you get:

- Full and immediate access to more than 90 individual workshops
- Plus: Personal assistance to help you select the best QuickBooks software to fit your company.
- Plus: 30% discounts on Info Plus support products.
- Plus: With CAMP VIP, you get Private Q&A and coaching sessions with your QuickBooks business advisor and instructor, [Diane Gilson](#).



[More info...](#)



[eCPA - employee Cost & Pricing Analyzer™](#)

Convert Labor Burden to Profits!

Calculate regular and overtime labor burden and employee billing rates. Display actual, fully-burdened labor costs for each employee (per year, hour, or minute). **Compute exactly what to charge to achieve your desired profit on labor costs!**

[Show Me More...](#)

[AccountingPRO™ \(Construction template data file for QuickBooks\)](#)

Put a Clean Start in your Cart!

Info Plus created AccountingPRO™ to meet the specific needs of the construction industry. This flexible, pre-built QuickBooks data file not only saves start-up time, but is designed to help business owners (or their accountants) more easily and effectively access QuickBooks' powerful industry-specific data collection, job-cost, profit-building, and reporting features.



[Show Me More...](#)

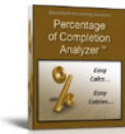


[The You & Your Business Survey...](#)

The **You and Your Business survey** is a great way for you to tell us more about you and what you're looking to accomplish with your accounting system, reports, and financial controls.

Watch our short (less than 5 minute) video to see what the survey is all about.

[Show Me More...](#)



[Percentage of Completion Analyzer™](#)

See True Job Profitability Throughout the Life of Your Longer-Term Contracts

Don't rely on guesstimates from job-site supervisors! Instead, use this tool to perform background calculations and see the exact \$ amounts and journal entries you need to make to accurately adjust income for long-term contracts. (Includes detailed "Percentage of Completion" training and sample calculations.)

[Show Me More...](#)

[The Needs Assessment](#)

The **Needs Assessment** helps company owners, bookkeepers, and accountants map the route to business success.

Your **Needs Assessment** includes a 90-minute business advisory conference with [Diane Gilson](#), where you walk through:

- Your **Needs Assessment Survey** (based on the information you provide to us)
- Your **Structural Scorecard** results (where we reveal your scorecard results to you)
- **Roadmap Job-Cost Planning Service** (where we use our tools to help you select and prioritize your next steps forward)
- **BONUS: Profit-Booster Calculations** (where we reveal your hidden profit potential based on the information you've provided to us)



[Show Me More...](#)

[Month-End Checklist](#)

Accurate, On-Time Reports - Each and Every Month...

This month-end closing, proofing, and balancing checklist gives you the tools you need to review, self-correct, and protect your monthly records and job-cost reports. This date-driven checklist will help you consistently meet those monthly reporting deadlines...



[Show Me More...](#)

Insights on QuickBooks, Enterprise, and Intuit 'Plug-Ins'

Trust our years of experience to find the right fit for your business (then we'll help you locate the best available price!)

