

# *QuickBooks Project Management Apps...*

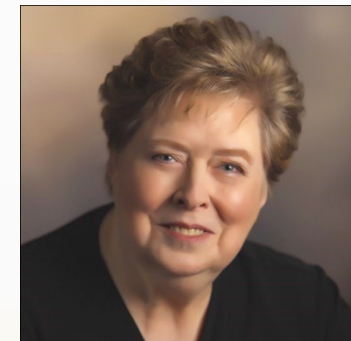
## **Pros, Cons & Insights**



+



**Tom Houghton**  
Owner & Lead Consultant  
Round Peg Solutions



**Diane Gilson**  
President & Founder  
Info Plus Accounting, Inc. &  
BuildYourNumbers.com



## Why We're Teaming Up Today

- **Financial perspective:**
  - Successful field operations **create economic wealth and business success**
  - As companies grow, multi-level communication and successful project management **becomes increasingly critical!**
- Primary issues companies face include... ***“How do we...***
  - ***Create clear, understandable processes?***
  - ***Avoid stress and chaos?***
  - ***→ Deliver quality outcomes to our clients, and***
  - ***Achieve profitable results for our company?”***



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## ABOUT TOM HOUGHTON

- **Position**
  - Owner & Lead Consultant, Round Peg Solutions
- **Awards**
  - 40 Under 40 – ProRemodeler Magazine
  - Zenefits POPS Implementation Award (HR)
- **Certificates & Experience**
  - CoConstruct – Migration Expert
  - JobTread – Preferred Marketplace Partner
  - Buildertrend Certified Super-User
  - Support to hundreds of construction companies with project management implementations & tech
- **Fun facts:**
  - Resident of Omaha, Nebraska (Serves clients nationally...)
  - Husband and father of three (12, 10 and 8!)
  - **Sharks fought:** (Zero. We'd prefer to keep it that way.)

## ABOUT DIANE GILSON

- **Consultant, Trainer, Speaker, Author and Product Developer**
- **25+ Years Working with Business Owners & Accounting Staff to Help Develop Job-Cost & Management Accounting Systems**
- **Certifications and Awards:**
  - **Emeritus (Lifetime) U.S. ProAdvisor of the Year**
  - **Top Niche Practice (Construction) ProAdvisor**
  - 10-year Top 100 ProAdvisor
  - Certified Advanced & Enterprise ProAdvisor
  - CPA background
  - Certified Internal Auditor background
- **Extensive Accounting Background & Experience**
  - 16 years of public accounting
  - 13 years of banking
  - Founder of Info Plus Accounting in 1994



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## *Project Management Apps: So many options!*

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***“Decision-making is easy when your values are clear.”***

(Roy Disney)



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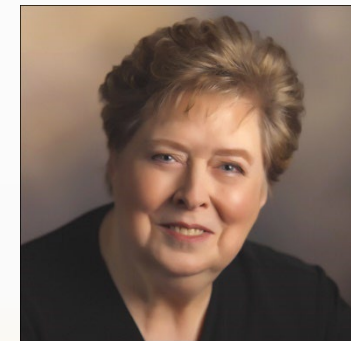
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# Project Management Apps: Exciting Integrations!

- Construction Company Type
- Future vision for your company?
- Defining Your 3-5 Biggest Needs
- Specific Application vs. “All in One?”
- Do you want to integrate with QuickBooks?
  - **Upfront Tip!**
  - **QuickBooks Desktop?**
  - **QuickBooks Online?**



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# Project Management Apps: Intriguing Advances!



- Data Storage (location)
  - **In-house** server
  - **Hosted** server
  - **Cloud-based** (SAAS)
- **WHO** will be using it?
- Communication modes
  - **Mobile**
  - **Personal computers**
- **Compatibility** with existing apps



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# Capabilities: Which Do You Need? Want? & When?

Job (cost) codes
Planning and scheduling process (Gantt Charts, interactive modifications)
Shared calendar
Estimates
Change OrdersPurchase 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



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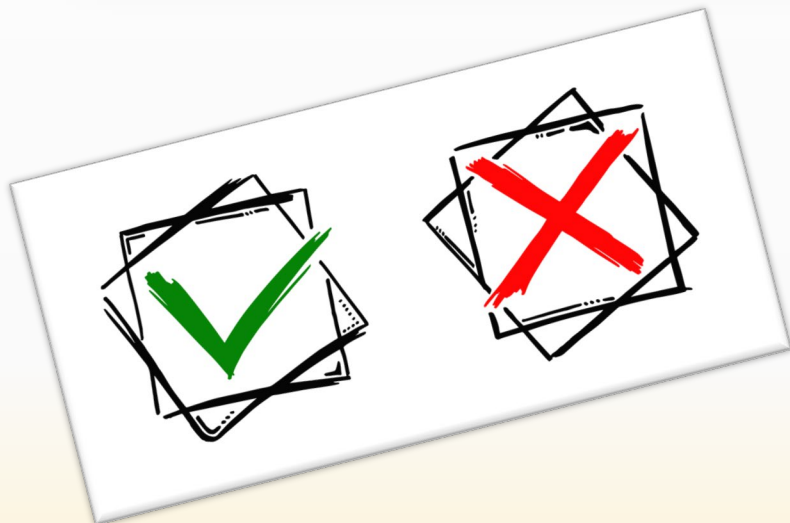
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# Features: Which Do You Need? Want? When?

## 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



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## Interactive Information: How does it work?

- Ongoing changes to transactions:
  - **One-way** synch?
  - **Two-way** synch?
  - **Cloud-based** (SAAS)
- **Status** update frequency?
- Data integrity:
  - **Security options**
  - **Error reporting and recovery**
- **Support**
  - **Mode** (phone, chat, email)
  - **Hours and response time**
  - **User suggestions?**



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## Under the Covers: Thinking it through...



- **Top 5 Project Reports** you're looking for?
- **Ease of implementation?** (Who? Hours?)
- Ability to **customize?**
  - How unique are your needs?
  - How much detail do you need?
- **Training** (*resources and cost*)
  - Online recorded
  - Online live
  - Off-site multi-day
  - Consultant training options
  - Documentation



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## Project Management Apps: Looking Ahead...

- **Other users**

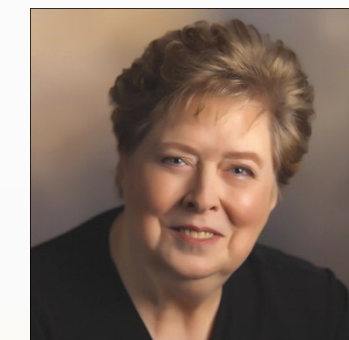
- Number of companies using
- User reviews and comments (positive & negative)

- **Training** (*number and hours for...*)

- Management
- Financial
- Employees
- Vendors
- Customers



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## Project Management Apps: Sharpen the pencil...

### • Pricing

- Free Trial? Length?
- Refund options
- Upfront startup fees?
- Commitment period?
- Modular pricing?
- Fees based on \_\_\_\_\_?
- Annual estimated \$ \_\_\_\_\_?



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# Project Management Apps: What you get...

- **Anticipated annual benefit: Dollars and Sense...**
  - Documented, standardized procedures
  - Communications - internal
  - Communications - external
  - Customer & public perception
  - Decision-making info at hand
  - Avoiding the cost of lost & wasted time
  - Reduced stress
  - **Estimated annual \$ impact \_\_\_\_\_?**



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*Download It...*

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## Get Your Own Evaluation Checklist(s)

- ✓ PDF Version
- ✓ Excel Version



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Giveaway  
result!

## Round Peg Solutions – Q&A

- What kinds of software consulting & support do you offer?
- How are you different from other consultants?
- Do you work with non-construction clients?
- How do you take on new clients?
- How long do your clients typically continue to work with your company?

Q & A



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- Review of your current technology usage.
- Assessment of cost, team familiarity, and ROI.
- We'll deliver a roadmap of chosen tech for your business.

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(402) 999-0855 <https://roundpegsolutions.com/>

## See Job Cost & Various QuickBooks Resources

(developed by Diane) at:

[BuildYourNumbers.com](http://BuildYourNumbers.com)

- Our most popular product - Online Job-Cost Training for QuickBooks desktop:  
[CAMP – \(Construction Accounting & Management Program\)](#)
- Pre-built Construction Template for QuickBooks: [AccountingPRO](#)
- Find out what your Employees REALLY cost:  
[eCPA – Employee Labor Cost \(Burden\) Calculator](#)
- Accurate reports every month: [Month-End Closing Procedures](#)
- Free Self-Assessment: [Profitability Management Tools](#)
- We'll help you choose the best QuickBooks & Enterprise software...
- **And much more...**

For questions or conversation, contact the Info Plus Team at:  
**734-544-7620 (9-5 Eastern) OR [Help@InfoPlusAcct.com](mailto:Help@InfoPlusAcct.com)**

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

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



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