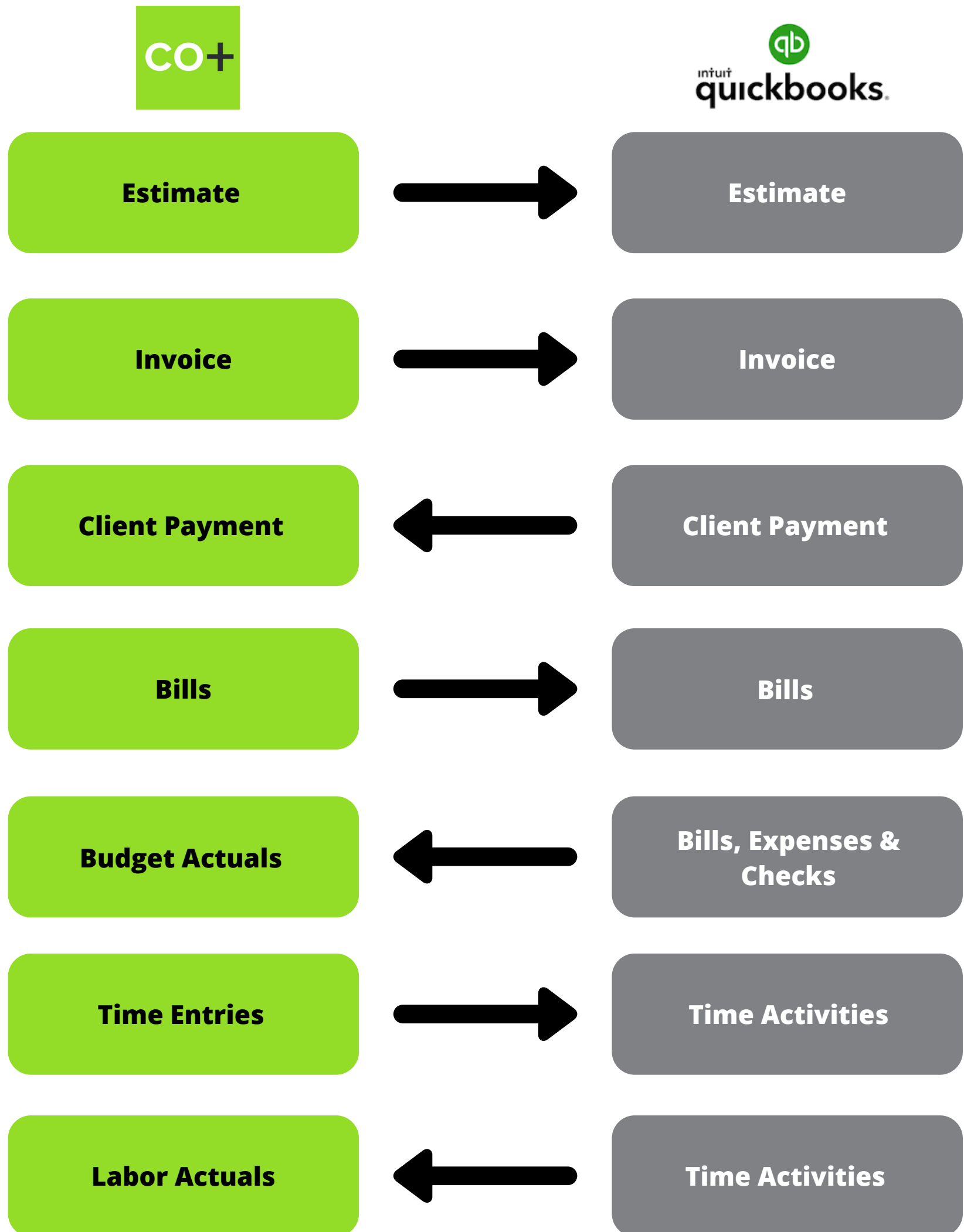


CoConstruct - QuickBooks Online Integration

CoConstruct & QuickBooks Online Full Demo Video:

<https://coconstruct.link/QBO-integration>



CoConstruct - QuickBooks Online Integration

Summary Estimate: CoConstruct > QuickBooks

Exporting the summary estimate from CoConstruct to QuickBooks will format your QBO estimate like the budget page in CoConstruct. This will push the totals for each accounting code from the estimate into a QBO estimate for reporting purposes.

Budget											
This is a fixed price project. Clients cannot see this budget.											
<input type="button" value="Export"/> <input type="button" value="Sync"/>											
	Accounting Code	Original	Revised	Committed	Actuals	Complete	Projected	Price/sq. ft.	% of Total	Difference	Cost to Complete
>	1010 Building Permits	1,498.05	1,498.05	1,494.30	1,766.80	<input type="checkbox"/>	1,766.80	0.73	0.58	268.75	0.00
>	1200 SITE WORK	535.50	535.50			<input type="checkbox"/>	535.50	0.22	0.17	0.00	535.50
>	1210 Lot Clearing	2,550.00	2,550.00			<input type="checkbox"/>	2,550.00	1.05	0.83	0.00	2,550.00
×	1410 Temporary Electric	0.00	0.00			<input type="checkbox"/>	0.00	0.00	0.00	0.00	0.00
>	2000 EXCAVATION	16,065.00	16,065.00			<input type="checkbox"/>	16,065.00	6.64	5.24	0.00	16,065.00
>	2100 FOOTING AND FOUNDATIONS	11,701.44	11,701.44			<input type="checkbox"/>	11,701.44	4.84	3.82	0.00	11,701.44
>	3110 Materials - Floor Framing	11,791.20	11,791.20			<input type="checkbox"/>	11,791.20	4.87	3.85	0.00	11,791.20
>	3130 Materials - Roof Framing	6,359.70	6,359.70			<input type="checkbox"/>	6,359.70	2.63	2.07	0.00	6,359.70
>	3160 Framing Labor	16,044.60	16,044.60			<input type="checkbox"/>	16,044.60	6.63	5.23	0.00	16,044.60
>	3450 Precast Decks and Walls	5,193.84	5,193.84			<input type="checkbox"/>	5,193.84	2.15	1.69	0.00	5,193.84
>	3710 Rough Electrical Material	5,916.00	5,916.00			<input type="checkbox"/>	5,916.00	2.44	1.93	0.00	5,916.00
>	4010 Roofing Material	1,924.82	1,924.82			<input type="checkbox"/>	1,924.82	0.80	0.63	0.00	1,924.82
>	4020 Roofing Labor	2,080.80	2,080.80			<input type="checkbox"/>	2,080.80	0.86	0.68	0.00	2,080.80
>	4510 Windows	20,455.08	20,455.08			<input type="checkbox"/>	20,455.08	8.45	6.67	0.00	20,455.08
>	4540 Exterior Doors	2,793.06	2,793.06			<input type="checkbox"/>	2,793.06	1.15	0.91	0.00	2,793.06
>	4550 Interior Closet Doors	8,058.00	8,058.00			<input type="checkbox"/>	8,058.00	3.33	2.63	0.00	8,058.00

Estimate #1043C
Help X

Customer: Email:

Pending This customer is not tax exempt Send later CoBoc

Billing address: Estimate date: Expiration date:

Shipping to: Ship via: Shipping date: Tracking no.:

AMOUNT

\$322,840.84

Estimate no.:

Department:

Class:

Location of sale:

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX	
1		1010 Building Permits	Building Permits	1	1,498.05	1,498.05	✓	<input type="checkbox"/>
2		1200 SITE WORK		1	535.50	535.50	✓	<input type="checkbox"/>
3		1210 Lot Clearing		1	2,550.00	2,550.00	✓	<input type="checkbox"/>
4		2000 EXCAVATION		1	16,065.00	16,065.00	✓	<input type="checkbox"/>
5		2100 FOOTING AND FOUNDATIONS		1	11,701.44	11,701.44	✓	<input type="checkbox"/>
6		3110 Materials - Floor Framing		1	11,791.20	11,791.20	✓	<input type="checkbox"/>
7		3130 Materials - Roof Framing		1	6,359.70	6,359.70	✓	<input type="checkbox"/>
8		3160 Framing Labor		1	16,044.60	16,044.60	✓	<input type="checkbox"/>
9		3450 Precast Decks and Walls		1	5,193.84	5,193.84	✓	<input type="checkbox"/>
10		3710 Rough Electrical Material		1	5,916.00	5,916.00	✓	<input type="checkbox"/>
11		4010 Roofing Material		1	1,924.82	1,924.82	✓	<input type="checkbox"/>

CoConstruct - QuickBooks Online Integration

Detailed Estimate: CoConstruct > QuickBooks

Exporting the detailed estimate from CoConstruct to QuickBooks will format your QBO estimate like the estimate page in CoConstruct. This will push individual cost lines, quantities and amounts from the estimate into a QBO estimate.

Description	Qty.	Units	Unit Cost	Ext. Cost	Cost Type	Accounting Code	Contingency	OH&P	Total Price	Price/t
1000 Preparation Preliminaries				\$3,994.30				\$53.75	\$1,349.35	\$5,397.40
1000 Building Permit				\$1,494.30				\$3.75	\$499.35	\$1,997.40
Admin time to file permit application	2.5	hours	75.00	187.50	Labor	1010 Building ...	2%	3.75	63.75	255.00
Municipal building permit fee	2,420	s.f.	0.54	1,306.80	Other	1010 Building ...	0%	0.00	435.60	1,742.40
1200 Clear Lot				\$2,500.00				\$50.00	\$850.00	\$3,400.00
Clear trees	1	each	2,500.00	2,500.00	Subcontract	1210 Lot Cleari...	2%	50.00	850.00	3,400.00
1400 Heating & Hot Water				\$0.00				\$0.00	\$0.00	\$0.00
2000 Excavation and Foundation				\$27,222.00				\$544.44	\$9,255.48	\$37,021.92
2000 Excavation				\$15,750.00				\$315.00	\$5,355.00	\$21,420.00
Excavation backfill and rough grading for foundation	1	each	14,250.00	14,250.00	Subcontract	2000 EXCAVAT...	2%	285.00	4,845.00	19,380.00
Utility trenching - includes backfill	30	l.f.	50.00	1,500.00	Subcontract	2000 EXCAVAT...	2%	30.00	510.00	2,040.00
2100 Foundation				\$11,472.00				\$229.44	\$3,900.48	\$15,601.92
3000 Rough Structure				\$38,617.00				\$772.34	\$13,129.78	\$52,519.12
3100 Framing				\$33,525.00				\$670.50	\$11,398.50	\$45,594.00
3400 Decks				\$5,092.00				\$101.84	\$1,731.28	\$6,925.12

Estimate #1043C Help

Customer: Example House | Email: | **\$322,840.84** AMOUNT

Pending Send later Co-Boc

Billing address: Example House | Estimate date: 09/28/2020 | Expiration date:

Shipping to: | Ship via: | Shipping date: | Tracking no.:

Estimate no.: 1043C | Department: | Class: | Location of sale:

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX
1			-----CATEGORY: 1000 Preparation Preliminaries-----				
2			-----1000 Building Permit-----				
3		1010 Building Permits	Admin time to file permit application	2.5	75	187.50	✓
4		1010 Building Permits	Municipal building permit fee	2,420	0.54	1,306.80	✓
5			-----1200 Clear Lot-----				
6		1210 Lot Clearing	Clear trees	1	2,500	2,500.00	✓
7			-----CATEGORY: 2000 Excavation and Foundation-----				
8			-----2000 Excavation-----				
9		2000 EXCAVATION	Excavation backfill and rough grading for foundation	1	14,250	14,250.00	✓
10		2000 EXCAVATION	Utility trenching - includes backfill	30	50	1,500.00	✓
11			-----2100 Foundation-----				

CoConstruct - QuickBooks Online Integration

Invoices: CoConstruct > QuickBooks

Invoices created in CoConstruct will create invoices in QuickBooks so that you can track accounts receivables and record payments to invoices within your accounting system.

Customer Success QBO

Invoice

Number: EH-2

Issued: Sep 28 2020

Due Date: Sep 30 2020

Summary

Progress Invoice #2

Issued By

Customer Success QBO
1234 Main St.
Charlottesville, VA 22902
434-326-0500

Project

Example House
1234 Main St.
Charlottesville, VA 22902

Issued To

Jane Maples

Item	Amount
2000 EXCAVATION – 100% complete	\$21,420.00
2100 FOOTING AND FOUNDATIONS – 100% complete	\$15,601.92
Total	\$37,021.92

Invoice #EH-2
Help

Customer Example House

Customer email

Send later Co/BoC

Online payments

Cards visa mc amex disc

Bank transfer ach

Tired of tracking down billable hours?

Be confident that you're being paid for every minute worked. Easily and accurately track billable time against your customers and have it automatically show up in QuickBooks for streamlined invoicing. [Learn more](#)

PAYMENT STATUS

PAID

1 payment made (\$37,021.92)

Billing address

Terms

Invoice date **Due date**

Shipping to

Ship via **Shipping date** **Tracking no.**

Invoice no.

Department

Class

Location of sale

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	TAX
1		2000 EXCAVATION	100% complete	1	21,420	21,420.00	✓
2		2100 FOOTING AND FOUNDATIONS	100% complete	1	15,601.92	15,601.92	✓
3							

Message on invoice

Subtotal \$37,021.92

Taxable subtotal

CoConstruct - QuickBooks Online Integration

Client Payments: QuickBooks > CoConstruct

Client Payments received in QuickBooks will be pushed to CoConstruct under the Payment Summary details. If the payment is associated with an invoice pushed from CoConstruct, that invoice will automatically be marked as paid in CoConstruct as well.

When using CoConstruct's client payments option, the payment will push from Stripe to your QuickBooks file and automatically mark the associated invoice as paid in QuickBooks as well.

Receive Payment
Help X

Customer:

Payment date:

Payment method: Reference no.: Deposit to:

AMOUNT RECEIVED

\$37,021.92

Amount received:

Outstanding Transactions

All

	DESCRIPTION	DUE DATE	ORIGINAL AMOUNT	OPEN BALANCE	PAYMENT
<input checked="" type="checkbox"/>	Invoice # EH-2 (09/28/2020)	09/30/2020	37,021.92	37,021.92	<input type="text" value="37,021.92"/>

< First Previous 1-1 of 1 Next Last >

 Amount to Apply: \$37,021.92

 Amount to Credit: \$0.00

Customer Success QBO

Invoice

Number: EH-2

Issued: Sep 28 2020

Due Date: Sep 30 2020

Summary

Progress Invoice #2

Issued By

Customer Success QBO
1234 Main St.
Charlottesville, VA 22902
434-326-0500

Project

Example House
1234 Main St.
Charlottesville, VA 22902

Issued To

Jane Maples

Item	Amount
2000 EXCAVATION – 100% complete	\$21,420.00
2100 FOOTING AND FOUNDATIONS – 100% complete	\$15,601.92
Total	\$37,021.92

Payment Summary

Date	Amount
9/28/2020	\$6,111.40
9/28/2020	\$37,021.92
Payments to date	\$43,133.32

This invoice was paid in QuickBooks.



CoConstruct - QuickBooks Online Integration

Purchase Order Bills: CoConstruct > QuickBooks

Bills entered against Purchase Orders in CoConstruct will push bills into QuickBooks so that you can keep track of accounts payable and pay your subs and vendors. Bills are automatically created using the associated accounting codes and project information to allow for easy, accurate job costing. Once the bill is paid in QuickBooks, the bill will automatically be marked paid in CoConstruct.

Description	Accounting Code	Qty	Units	Unit Price	Total
1 Admin time to file permit application	1010 Building Permits	2.5	hours	\$75.00	\$187.50
2 Municipal building permit fee	1010 Building Permits	2420	s.f.	\$0.54	\$1,306.80
Total					\$1,494.30

Bill ✕

Bill Number 2354

Date Sep 28 2020

Description	Accounting Code	Qty. Complete	Units	Unit Price	Amount
Admin time to file permit application	1010 Building Permits	1.33333	hours	\$75.00	\$100.00
Municipal building permit fee	1010 Building Permits	2420	s.f.	\$0.54	\$1,306.80
Total					\$1,406.80

Ready to Pay All work has been verified and this bill is ready for payment.

[Edit](#)

Bill #2354
Help

Vendor: A Walter

Mailing address: A Walter

Terms: Net 30

Bill date: 09/28/2020

Due date: 10/28/2020

Bill no.: 2354

Department:

Permit no.:

BALANCE DUE

\$1,406.80

[Schedule online payment](#) [Mark as paid](#)

▼ Category details

#	CATEGORY	DESCRIPTION	AMOUNT	BILLABLE	MARKUP %	TAX	CUSTOMER / PROJECT	CLASS
1								
2								

[Add lines](#) [Clear all lines](#)

▼ Item details

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	BILLABLE	MARKUP %	SALES AMT	TAX	CUSTOMER / PROJECT	CLASS
1	1010 Building Permits	Admin time to file permit application	1.33333		100.00	View		100.00	✓	Example House	
2	1010 Building Permits	Municipal building permit fee	2,420		1,306.80	View		1,306.80	✓	Example House	
3											

[Add lines](#) [Clear all lines](#)

Memo: _____

Total \$1,406.80

CoConstruct - QuickBooks Online Integration

Budget Actuals: QuickBooks > CoConstruct

Bills, expenses or checks entered in QuickBooks that are coded to the products and services and project will sync back to CoConstruct as budget actuals for the project. Bills do not have to be pushed from CoConstruct to be recognized as actuals - any bills, expenses or checks entered in QuickBooks manually or from other source will sync to CoConstruct as actuals as long as they're coded to the products & services and linked project.

CoConstruct's budget will provide a detailed list of transactions for budget actuals that can easily be shared with clients on open book projects.

Bill #2354 Help

Vendor: A Walter

BALANCE DUE
\$1,406.80
[Schedule online payment](#) [Mark as paid](#)

Mailing address: A Walter
 Terms: Net 30
 Bill date: 09/28/2020
 Due date: 10/28/2020
 Bill no.: 2354
 Department:
 Permit no.:

▼ Category details

#	CATEGORY	DESCRIPTION	AMOUNT	BILLABLE	MARKUP %	TAX	CUSTOMER / PROJECT	CLASS
1								
2								

▼ Item details

#	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	BILLABLE	MARKUP %	SALES AMT	TAX	CUSTOMER / PROJECT	CLASS
1	1010 Building Permits	Admin time to file permit application	1.33333		100.00	View		100.00	✓	Example House	
2	1010 Building Permits	Municipal building permit fee	2.420		1,306.80	View		1,306.80	✓	Example House	
3											

Total \$1,406.80

Budget

This is a fixed price project. Clients cannot see this budget.

Export Sync Discard changes Save changes

Accounting Code	Original	Revised	Committed	Actuals	Complete	Projected	Price/sq. ft.	% of Total	Difference	Cost to Complete	Notes
> 1010 Building Permits	1,498.05	1,498.05	1,494.30	1,766.80	<input type="checkbox"/>	1,766.80	0.73	0.58	268.75	0.00	They added a \$25 fee
> 1200 SITE WORK										535.50	
> 1210 Lot Clearing										2,550.00	
✕ 1410 Temporary Electric										0.00	Getting updated rates.
> 2000 EXCAVATION										5,065.00	
> 2100 FOOTING AND FOUNDATIONS										1,701.44	
> 3110 Materials - Floor Framing										1,791.20	

Actuals - 1010 Building Permits

Date	Type	Ref. Num.	Vendor	Description	Amount
Sep 28 2020	Bill	2354	A Walter	Admin time to file permit application, Municipal building permit fee	\$1,406.80
Sep 29 2020	Labor				\$360.00
Total					\$1,766.80

CoConstruct - QuickBooks Online Integration

Time Entries: CoConstruct > QuickBooks

Time entries recorded in CoConstruct can be pushed to Time Activities in QuickBooks once approved. This will populate your weekly timesheet in QB to run payroll and report on time spent on jobs.

Time Clock

9/21/2020 - 9/28/2020

All employees
 Example House
 All activities
 All locations

Date	Employee	Type	Project	Activity	In	Out	Hours	Notes	Approved	QuickBooks
Mon 9/28	CoConstruct Su...	Regular	Example House	4920 Exterior Painting...			8:00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fri 9/25	CoConstruct Su...	Regular	Example House	4920 Exterior Painting...			9:00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Thu 9/24	CoConstruct Su...	Regular	Example House	4920 Exterior Painting...			8:00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Wed 9/23	CoConstruct Su...	Regular	Example House	4920 Exterior Painting...			8:00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tue 9/22	CoConstruct Su...	Regular	Example House	7100 Administrative L...			8:00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mon 9/21	CoConstruct Su...	Regular	Example House	5920 Interior Painting ...			8:00		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Weekly Timesheet

Amber J Harlow | 9/20/2020 to 9/26/2020 | TOTAL HOURS: 41:00

#	DETAILS	SUN 20	MON 21	TUE 22	WED 23	THU 24	FRI 25	SAT 26	TOTAL
1	Example House Cost rate (/hr) 30.00 5920 Interior Painting Labor Description <input checked="" type="checkbox"/> Billable (/hr) 45.00 <input type="checkbox"/> Taxable		8:00						Cost \$240.00 Hrs 8:00 Enable \$360.00
2	Example House Cost rate (/hr) 30.00 7100 Administrative Labor Description								Cost \$240.00 Hrs 8:00 Enable \$360.00
3	Example House Cost rate (/hr) 30.00 4920 Exterior Painting Labor Description					8:00	9:00		Cost \$750.00 Hrs 25:00 Enable \$1,125.00

Time Activity

Enter Start and End Times
 Date: 09/21/2020
 Name: Amber J Harlow
 Time: 8:00
 Cost rate (/hr): 30.00
 Customer/Project: Example House
 Service: 5920 Interior Painting Labor
 Billable (/hr) 45.00 Taxable
 Department: Choose a department
 Class: Choose a class

Description

Summary 8 hours at \$45.00 per hour = \$360.00

CoConstruct - QuickBooks Online Integration

Labor Actuals: QuickBooks > CoConstruct

Time Activities from QuickBooks will come back to CoConstruct as labor actuals when recorded with the project and service item information. The amount populated for labor actuals is based off the Billable Rate of the time activity as shown in QuickBooks.

Time Activities do not have to originate from CoConstruct to be recognized as labor actuals. Any Time Activities coded to the service items and linked project will be recognized as labor actuals.

Weekly Timesheet

Amber J Harlow | 9/20/2020 to 9/26/2020 | TOTAL HOURS: 41:00

#	DETAILS	SUN 20	MON 21	TUE 22	WED 23	THU 24	FRI 25	SAT 26	TOTAL
1	Example House Cost rate (/hr) 30.00 5920 Interior Painting Labor Description <input checked="" type="checkbox"/> Billable (/hr) 45.00 <input type="checkbox"/> Taxable		8:00						Cost: \$240.00 Hrs: 8:00 Billable: \$360.00
2	Example House Cost rate (/hr) 30.00 7100 Administrative Labor Description <input checked="" type="checkbox"/> Billable (/hr) 45.00 <input type="checkbox"/> Taxable			8:00					Cost: \$240.00 Hrs: 8:00 Billable: \$360.00
3	Example House Cost rate (/hr) 30.00 4920 Exterior Painting Labor Description <input checked="" type="checkbox"/> Billable (/hr) 45.00 <input type="checkbox"/> Taxable					8:00	8:00	9:00	Cost: \$750.00 Hrs: 25:00 Billable: \$1,125.00

Time Activity

Date: 09/21/2020

Name: Amber J Harlow

Cost rate (/hr): 30.00

Customer/Project: Example House

Service: 5920 Interior Painting Labor

Billable (/hr) 45.00 Taxable

Department: Choose a department

Class: Choose a class

Time: 8:00

Description:

Summary: 8 hours at \$45.00 per hour = \$360.00

Date	Type	Ref. Num.	Vendor	Description	Amount
Sep 21 2020	Labor				\$360.00
Total					\$360.00

Actuals - 5920 Interior Painting Labor

Item	12/750.00	12/750.00		12/750.00	5.27	4.16	0.00	12/750.00
5910 Interior Painting Material								
5920 Interior Painting Labor	0.00	0.00	360.00	360.00	0.15	0.12	360.00	0.00