
Step-by-Step Integration Guide



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Please do not be intimidated by the length of this guide. Understand that our goal is to provide you with every detail necessary to make the integration successful by ensuring that all prep work is done ahead of time to make the process go smoothly. We understand that following this page-by-page will take longer but we also know that when someone rushes through it, they spend more time on the backend cleaning up data they realized they should have managed prior to the sync. We do provide free integration assistance. It is recommended. Details on the next page.

v2022 - 2024 Users: You must install this Intuit patch (before or after) installing the connector for it to properly function. After installing the patch restart both the connector and QuickBooks Desktop (if they are running). <https://www.contractorforeman.com/qbd/qbdsdk160.exe>

Integration Assistance (RECOMMENDED)

We provide up to 1.5 hours of integration assistance with our third-party accounting partner. This is a recommended service as it can help save time due to an integration that wasn't correctly completed as a result of how your data is currently managed in QuickBooks.

Register: <https://kb.contractorforeman.com/knowledge-base/how-do-i-integrate-with-quickbooks/> Need help? Email support@contractorforeman.com and provide details and screenshots.

Step 1: Prepping Your Data

The connector works for Windows only. Before continuing, it's extremely important that you take the time and thoroughly read through the entire guide and that you make sure your QuickBooks account is prepped for syncing. Do not move forward with the integration until your data is prepped for syncing. Do not continue with the integration until you have read through the guide.

NOTE: The QB Desktop Canadian version is not supported if items are to be taxed. To connect QB and Contractor Foreman, a connector (.exe) must be installed on the machine running QB. If your host does not allow this, it will not work.

Contacts

If you have contacts (Customers, Employees & Vendors) in QuickBooks that you do not want to import into Contractor Foreman, consider making them Inactive. Otherwise, all contacts will be imported. If you complete the integration and then decide to archive records, you must Archive them in Contractor Foreman so that they flow to QuickBooks and become archived there. Archiving records is a one-way sync from Contractor Foreman to QuickBooks. If you have been using Contractor Foreman and QuickBooks in the past but did not have the two connected, you will first want to make sure the contact names in both systems have the same spelling so that the records can be automatically matched.

Archived Items

Archiving items is a one-way sync. If an item in Contractor Foreman is archived, it will become archived in QuickBooks (if linked). Items archived in QB do not get archived in CF.

Deleting Items

When you delete an item in one system, it WILL delete it in the other system. After the integration, do not delete anything that you do not want deleted from the other system.

What Does/Does Not Transfer

The following items are synced by the Contractor Foreman and QuickBooks Desktop Connector. **NOTE:** Existing items in QB (Bills, Invoices, Payments, Estimates, PO's) do not import into CF. If an existing record in QB is updated, it will then pull over into CF.






- Contacts (Employees, Vendors, Customers)
 - Keep in mind that QB requires unique first/last names across the whole system. If you have an Employee and Vendor with the same name, add a middle initial.
- Projects (Sub-Customers)
- Estimates
 - Estimates are not sent to QB until they have been Approved in Contractor Foreman.
- Projects
- Purchase Orders
 - Purchase Orders are not sent to QB until they have been Approved in Contractor Foreman.
- Invoices
 - Invoices are not sent to QB until they have been Approved in Contractor Foreman.
- Invoice Payments
 - Invoice Payments are not sent to QB until they have been Verified in Contractor Foreman.
 - Currently we do not sync Invoice Payments from QB to CF if it's associated with multiple Projects.
- Bills
 - Currently we do not sync Bills from QB to CF if it's associated with multiple Projects.
- Bill Payments
- Expenses
- Time Cards
 - Time Card data only syncs one-way from CF to QB. We do not transfer how much your employee is to be paid – QB handles that.
- Tax Rates
- Chart of Accounts
 - The COA is referenced within CF but updating or adding a new COA must take place in QB.
- Cost Codes
- Archived Items
 - If an item in Contractor Foreman is archived, it will become archived in QuickBooks (if linked). Items archived in QB do not get archived in CF.

Cost Codes

Contractor Foreman uses a two-tier Cost Code system. In Contractor Foreman, all items added to an invoice, estimate, etc are associated with a Child code. All Child codes are then grouped under a Parent code (for better structure and jobcosting). Child items in Contractor Foreman are equal to a Product/Service in QuickBooks. A Parent code in Contractor Foreman is equal to a top-level Service in QuickBooks. All Child items (QB:Service) must be under a Parent item as shown in the image. Codes that are not setup properly will not transfer correctly and will greatly increase the integration time and data cleanup. Here we have the Parent (Electrical Power Generation) and two child items below it. (The link icon represents the code is correctly synced with QB.)

Only the Name value gets transferred. If you want to use a code name and number, the format can shown in the Name value as “1010 – Flooring”.

NAME	DESCRIPTION	TYPE	ACCOUNT	ON S...	PRICE
◆ Electrical Power Gene...	Electrical Power Generation	Servi...	42600 - C...		
◆ Commissioning of ...	Commissioning of Electrical Pow	Servi...	42600 - C...		
◆ Common Work Re...	Common Work Results for Electri	Servi...	42600 - C...		

Cost Code # ▲	Cost Code Name	Status
	Electrical Power Generation	Active
	Commissioning of Electrical Pow 	Active   <input checked="" type="checkbox"/> Available in Time Cards?
	Common Work Results for Electri 	Active   <input checked="" type="checkbox"/> Available in Time Cards?

IMPORTANT: Go to Contractor Foreman > Menu > Settings > Cost Codes. If you see codes in there that you do not want imported into QuickBooks, contact support and we can remove those for you. You'll also have the option during the integration.

Keep in mind that QuickBooks restricts the length of each name to 31 characters. This will only be a concern if you have codes in CF that you are trying to match or import into QB. If you have been using Contractor Foreman and QuickBooks in the past but did not have the two connected, you will first want to make sure the Cost Code names in both systems have the same spelling so that the records can be automatically matched.

Do not continue with the integration until you have this step completed. An example of how this correctly looks in QuickBooks and in Contractor Foreman is shown below.

Step 2: Installing the Connector

Once the data in QuickBooks is prepped for syncing, the next step is to download the Connector. To do this, go to Menu > Settings > Integration and select QuickBooks Desktop. The connector should only be installed on one computer Contractor Foreman account.

Accounting Integration

Currently you can only use one Accounting system per company. Contact us if you need help connecting to your Accounting system.

Accounting System	None	QuickBooks Online	QuickBooks Desktop
	<p>Current Version: 1.0.2</p> <p>Whats' New: Some tabs are being shown based on setting like Roles, Groups, Vehicles and Cost Code. What about them? Should they be visible based on the above setting and not the access defined in the role. SG: With any NEW customer that signs up, the above roles should be applied to their account.</p> <p>This should not impact anyone who already has an account. Anyone assign to the role listed above should have access to those items. Meaning, the Office Manager will be able to see all tabs except for Roles. Laboror will not have access to any tabs.</p>		<p>Integration Steps</p> <ol style="list-style-type: none">1. Watch Integration Video<ul style="list-style-type: none">• New Contractor Foreman Users• Existing Contractor Foreman Users2. Confirm Cost Code Structure<ul style="list-style-type: none">• Before starting the integration, make sure the structure of your cost codes in QB and in CF match. Do not continue until this is finalized. (watch)3. Download Installer (Link)4. Install Connector

There you will see something that looks similar to the image above. Take the time to watch the integration video for a quick overview of the entire integration process whereas this guide is more detailed (and updated more frequently).

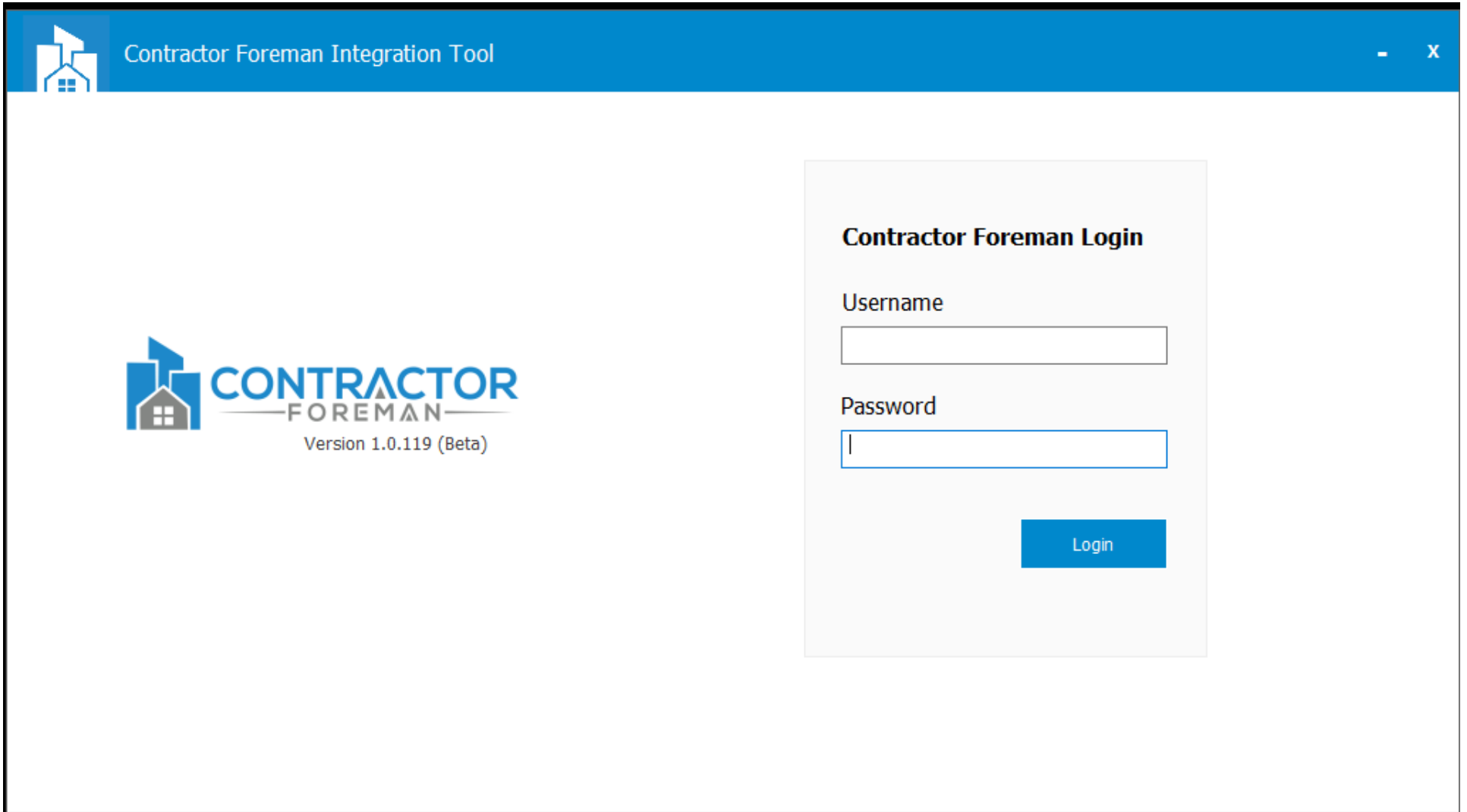
Click on the download link to install the Windows connector. During the installation process, provide the necessary permission for the application to be installed.

System Requirements

The connector will run on most any Windows machine. If you use a remote server, the connector will work as long as your hosting provider allows 3rd party tools to be installed. We do not support Mac. The connector works with QB Desktop 2016 and later.

Step 3: Logging into the Connector

Once the connector has been installed, you'll see something similar to the screen below. Here you will need to login using the credentials for the Contractor Foreman account administrator.



The screenshot shows a web application window titled "Contractor Foreman Integration Tool". The window has a blue header bar with a house icon on the left and window control buttons (minimize, maximize, close) on the right. The main content area is white. On the left side, there is a logo for "CONTRACTOR FOREMAN" with the text "Version 1.0.119 (Beta)" below it. On the right side, there is a login form titled "Contractor Foreman Login". The form contains two input fields: "Username" and "Password". Below the "Password" field is a blue "Login" button.

Step 4: Reviewing Reminders

On the next screen, make sure you review each point on the list. You'll need to check each point in the list before moving to the next step. Our experience shows us that those who rush through the integration tend to need to go back and clean up data in QB that should have been prepped to begin with.

Before moving forward, make a backup of your QB file.

Contractor Foreman Integration Tool

Setup Wizard

***** READ BEFORE CONTINUING*****

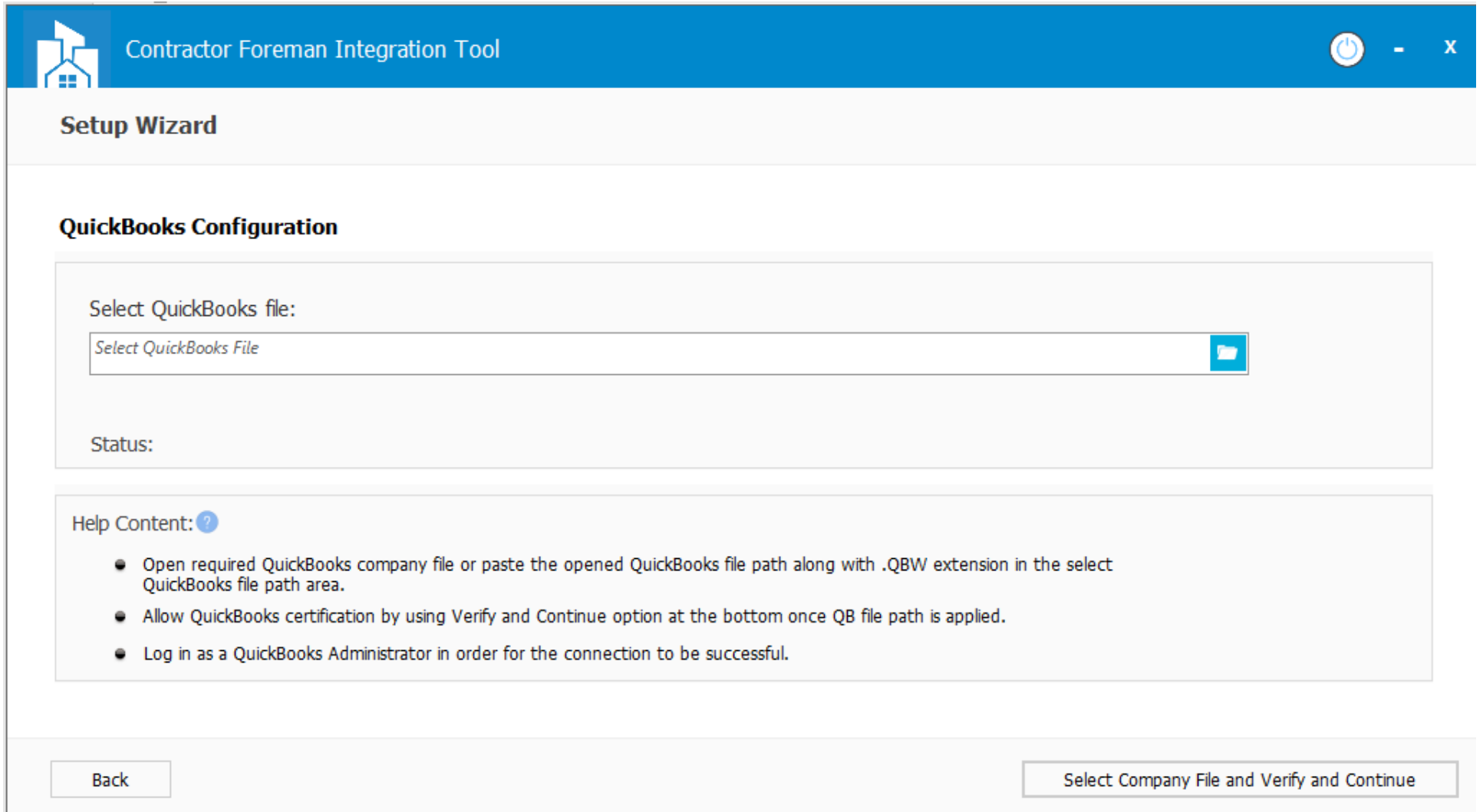
Read each point below before continuing as this text will not repeat itself.

- Create a backup before continuing.**
- Thoroughly review the integration video and step-by-step guide found in Settings > Financial. DO NOT SKIP THIS STEP.
- Make sure your Items list in QuickBooks is organized. Contractor Foreman uses a two-tier system which consist of a Division/Parent Code and a Major/Child Code. Parent codes cannot be selected within Contractor Foreman. Make sure your Items listed is organized so that all child items are located within a parent code.
- When contacts sync from one system to another, all will be synced. An option to select only 'some' isn't available. If records needs to be cleaned up, now would be the best time to do so.
- Log in as a QuickBooks Administrator in order for the connection to be successful.
- Time Cards and Archived items only sync from CF to QB. Currently we do not support splitting Bills and PO's between multiple projects.
- Make sure all Demo Data and stock cost codes have been removed. Message support if help is needed.
- Phone and training support are not provided but email and chat support are available.

Click to Continue

Step 5: Connecting the Connector to Your QB File

The next screen will require you to select the QB file that you want to connect to. It is not possible to connect to multiple QB files (companies/divisions) from one connector. Once the file has been selected, click the button in the bottom right to verify and continue.



The screenshot shows a software window titled "Contractor Foreman Integration Tool" with a blue header bar. Below the header, the main content area is titled "Setup Wizard" and "QuickBooks Configuration".

Under "QuickBooks Configuration", there is a section labeled "Select QuickBooks file:" with a text input field containing the placeholder text "Select QuickBooks File" and a blue folder icon button on the right. Below this is a "Status:" label.

Below the input field is a "Help Content: ?" section containing a bulleted list of instructions:

- Open required QuickBooks company file or paste the opened QuickBooks file path along with .QBW extension in the select QuickBooks file path area.
- Allow QuickBooks certification by using Verify and Continue option at the bottom once QB file path is applied.
- Log in as a QuickBooks Administrator in order for the connection to be successful.

At the bottom of the window, there are two buttons: "Back" on the left and "Select Company File and Verify and Continue" on the right.

Contractor Foreman Integration Tool

QuickBooks Update Service

There's a new QuickBooks software update waiting for you.

What's new in this update?

Install Now Install Later

qb intuit quickbooks.

Welcome!

Opening QuickBooks Desktop...

Select QuickBooks file:

C:\Users\osens\Desktop\sgqbd21.qbw

Status:

Help Content: ?

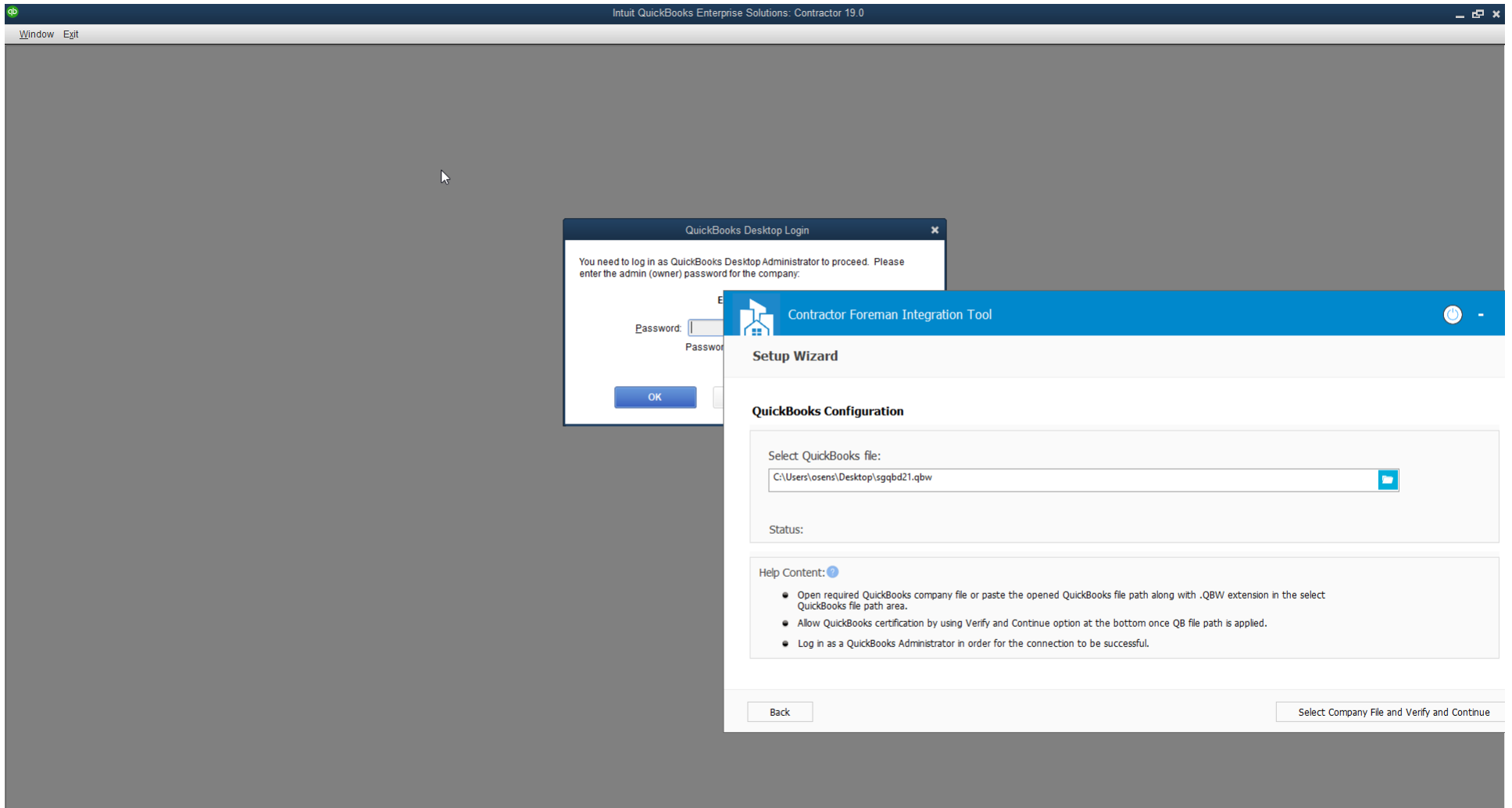
- Open required QuickBooks company file or paste the QuickBooks file path area.
- Allow QuickBooks certification by using Verify and Continue.
- Log in as a QuickBooks Administrator in order for the connection to be successful.

Back

Select Company File and Verify and Continue

Step 6: Log into Your QuickBooks File

Once the connection has been established, QuickBooks may ask you to log into your account. Remember that you must do so as the QB Admin. After the initial connection, future logins to QB can resume using the normal credentials you've used in the past.



During the process, you will receive a security notification asking you to allow the connector to connect to your QB file. Select the option that best meets your needs.

No = The connector will not be able to connect to QB and data will not sync.

Yes, prompt each time = You will be able to sync each time but you will have to confirm it.

Yes, when the QuickBooks company file is open = Data can be scheduled to sync (or manually) but QB will have to be open and running.

Yes, always; allow access even if QuickBooks is not running = This is the most popular as it allows you to sync changes after office hours.

QuickBooks - Application with No Certificate

An application without a certificate is requesting access to the following QuickBooks company file:

Way Technologies, LLC

Access may include reading and modifying QuickBooks data as well as enhancing the QuickBooks user interface (where applicable).

THE APPLICATION CALLS ITSELF

Contractor Foreman Integration Tool

CERTIFICATE INFORMATION

This application does not have a certificate. QuickBooks cannot verify the developer's identity.

QUICKBOOKS SOLUTIONS MARKETPLACE

[Learn about applications that integrate with QuickBooks](#)

Do you want to allow this application to read and modify this company file?

No

Yes, prompt each time

Yes, whenever this QuickBooks company file is open

Yes, always; allow access even if QuickBooks is not running

Login as:

Allow this application to access personal data such as Social Security Numbers and

The following screen will show upon successful connection.

The screenshot displays the Contractor Foreman Integration Tool Setup Wizard. The window title is "Contractor Foreman Integration Tool". The main section is titled "Setup Wizard" and contains a "QuickBooks Configuration" section. In this section, the "Select QuickBooks file:" field contains the path "C:\Users\osens\Desktop\sgqbd21.qbw". Below this, the "Company Name:" is "sgqbd21.qbw" and the "Status:" is "Connected at 11/13/2020 11:13 AM". A "Help Content:" section with a question mark icon contains three bullet points: "Open required QuickBooks company file or paste the opened QuickBooks file path along with .QBW extension in the select QuickBooks file path area.", "Allow QuickBooks certification by using Verify and Continue option at the bottom once QB file path is applied.", and "Log in as a QuickBooks Administrator in order for the connection to be successful." At the bottom of the wizard, there are two buttons: "Back" on the left and "Select Company File and Verify and Continue" on the right. A modal dialog box is overlaid on top of the wizard, titled "Contractor Foreman Integration Tool", with a close button (X) in the top right corner. The dialog contains an information icon (i) and the text "QuickBooks connection saved successfully...". At the bottom of the dialog is an "OK" button.

Step 7: Account Mapping

Rev 02/01/2024

QuickBooks requires that certain defaults be set before continuing. These do not replace the assigned income/expense accounts that you may have already assigned in QB to your Products & Services.

NOTE: Do not select “No Tax Agency” if you ever have a reason to assign a tax to anything as it will prevent the tax from sending from CF to QB.

The screenshot shows the 'Contractor Foreman Integration Tool' window with a blue title bar. Below the title bar is a 'Setup Wizard' header. The main content area is titled 'Account Mapping' and features a 'Refresh QuickBooks' button in the top right. The mapping section is organized into five boxes, each with a title and a dropdown menu:

- Products and Services Default Account**: Construction Income
- Invoices (Payment Deposits Account)**: Accounts Receivable
- Bills (Payment Bank/Credit Account)**: Checking PNC
- Expenses (Account)**: Uncategorized Expenses
- Sales Tax Item Agency**: Tax Agency

To the right of these boxes is a section titled 'Do I have Sales Tax Agency setup?' with two radio buttons: 'Yes' (selected) and 'No'. At the bottom of the window are 'Back' and 'Verify and Continue' buttons.

Once the accounts are mapped you'll receive a confirmation.



Setup Wizard

Account Mapping

Refresh QuickBooks

Products and Services Default Account ?

Construction Income

Bills (Payment Bank/Credit Account) ?

Checking PNC

Contractor Foreman Integration Tool



Account mapping saved successfully.

OK

Do I have Sales Tax Agency setup?

Yes

No

Expenses (Account) ?

Uncategorized Expenses

Sales Tax Item Agency ?

Tax Agency

Back

Verify and Continue

Select An Option

You'll now be required to select one of the three options. Read each option carefully before continuing. Most people will select the top option. If you are unsure which is best based on the amount of data in your account, email support@contractorforeman.com and we will be glad to assist.

- Option 1 – Continue to Page 15
- Option 2 – Continue to Page 15
- Option 3 – Continue to Page 21

Contractor Foreman Integration Tool

Setup Wizard

Select the option that best describes your current scenario.

- I am new to Contractor Foreman but already have QuickBooks.
- I am new to QuickBooks but already have Contractor Foreman **(Most Popular)**.
- I have a QuickBooks and a Contractor Foreman.

Contractor Foreman Integration Tool

The Directories (Customers, Vendors & Employees) will sync and upload to Contractor Foreman. Would you like to proceed?

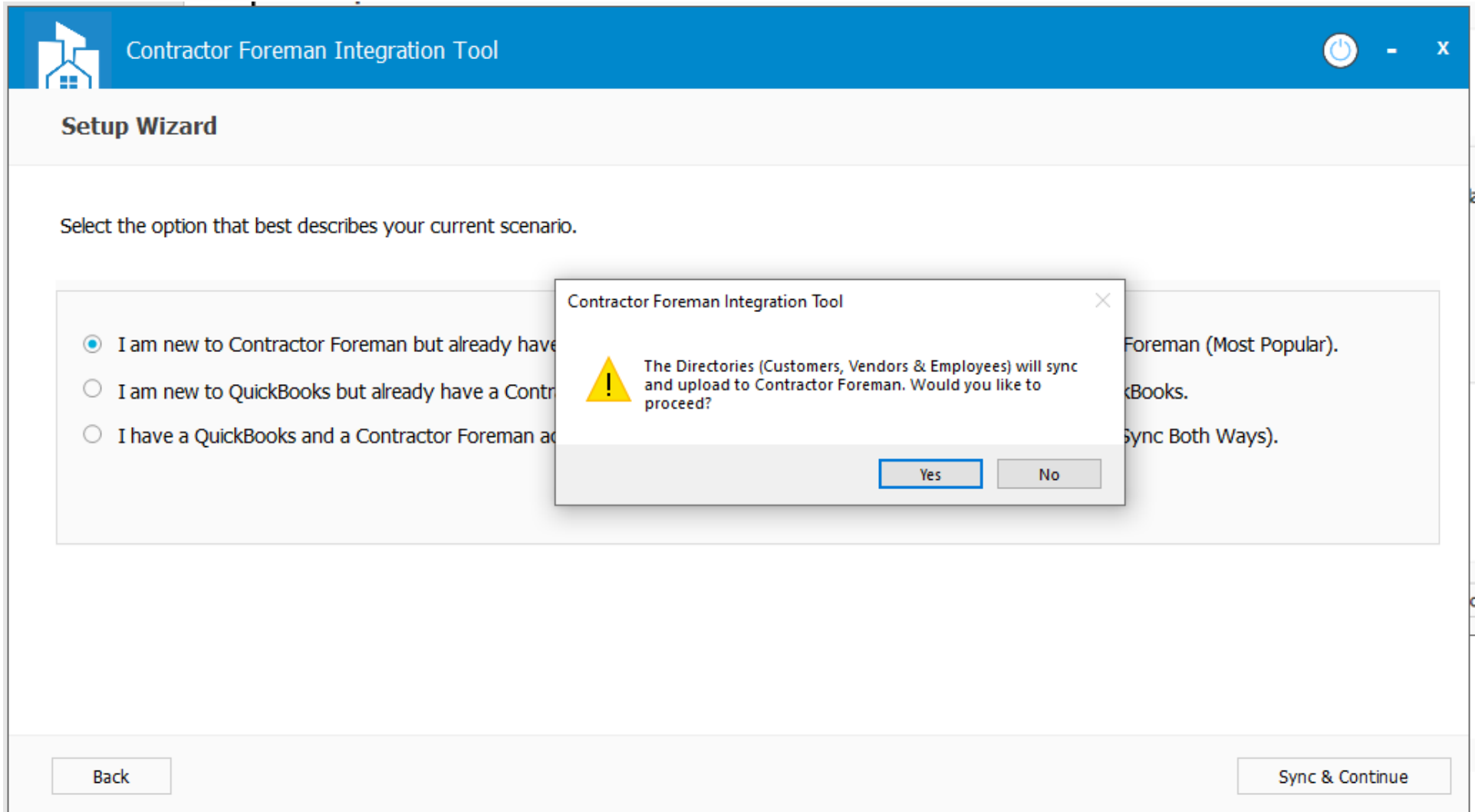
Yes No

Back Sync & Continue

Option 1 (and 2)

With the first option selected, clicking the button will show the following prompt. Clicking Yes will begin the process of importing your contacts into Contractor Foreman from QuickBooks. (Cost Codes are imported in a later step.)

Selecting Option 2 will have the same workflow as found below for Option 1.



Once finalized, you'll see a confirmation similar to the one below.

The screenshot shows the Contractor Foreman Integration Tool Setup Wizard. The window title is "Contractor Foreman Integration Tool". The main heading is "Setup Wizard". Below the heading, it says "Select the option that best describes your current scenario." There are three radio button options: "I am new to Contractor Foreman but a", "I am new to QuickBooks but already ha", and "I have a QuickBooks and a Contractor". A modal dialog box is open in the center, titled "Contractor Foreman Integration Tool", with an information icon and the text: "Directories and TaxRates has been synced successfully from QuickBooks to Contractor Foreman. We are ready to sync the transactions and other items bidirectionally." with an "OK" button. At the bottom of the wizard, it says "Sync process completed successfully" and has "Back" and "Sync & Continue" buttons.

Contractor Foreman Integration Tool

Setup Wizard

Select the option that best describes your current scenario.

- I am new to Contractor Foreman but a
- I am new to QuickBooks but already ha
- I have a QuickBooks and a Contractor

Contractor Foreman **(Most Popular)**.
d to QuickBooks.
together (Sync Both Systems).

Contractor Foreman Integration Tool

Directories and TaxRates has been synced successfully from QuickBooks to Contractor Foreman. We are ready to sync the transactions and other items bidirectionally.

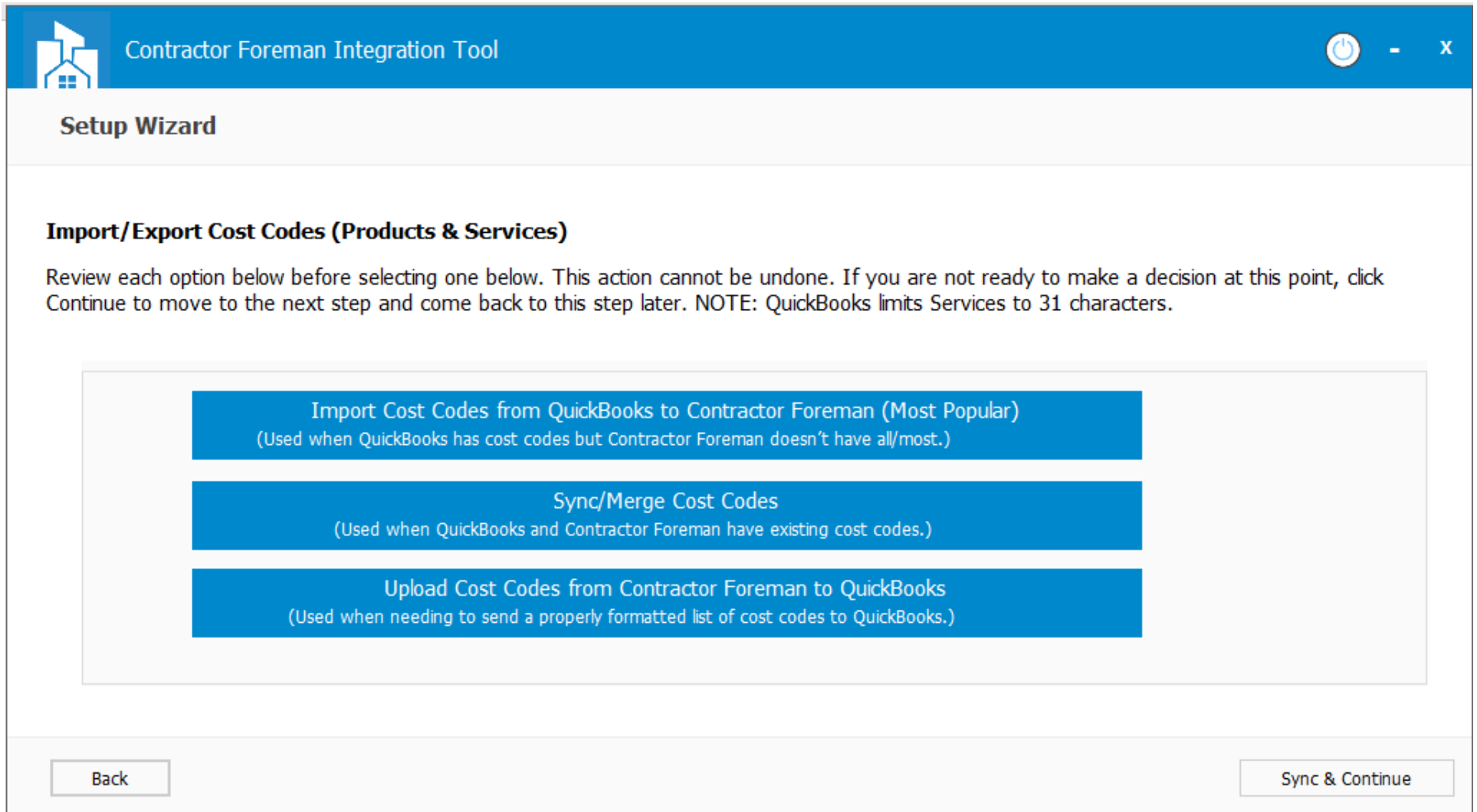
OK

Sync process completed successfully

Back Sync & Continue

The next step in the process is importing your Cost Codes (Products & Services) from QuickBooks into Contractor Foreman. This process is extremely easy if your items in QuickBooks are setup in the two-tier format mentioned at the beginning of the guide. Refer there if a review is needed.

Once ready, click on Import Cost Codes. You will be asked if you want to delete the existing codes in Contractor Foreman. We suggest clicking Yes so that there are no conflicts.



A confirmation will show that Cost Codes in Contractor Foreman have been deleted and the new items from QuickBooks have been imported. (You can also verify this by going to the Cost Codes section within your Contractor Foreman account.)

The screenshot shows the Contractor Foreman Integration Tool Setup Wizard. The window title is "Contractor Foreman Integration Tool". The main heading is "Setup Wizard". Below this, the section is "Import/Export Cost Codes (Products Services)". The text reads: "Review each option below before selecting one below. This action cannot be undone. If you are not ready to make a decision at this point, click Continue to move to the next step and come back to Contractor Foreman Integration Tool".

There are four main buttons visible: "Delete Cost Codes in Contractor Foreman", "Import from QuickBooks", "Sync/Merge Cost Codes", and "Import Cost Codes". A confirmation dialog box is overlaid on the "Delete Cost Codes in Contractor Foreman" button. The dialog box has a title bar "Contractor Foreman Integration Tool" and a close button (X). It contains an information icon (i) and the text: "Cost Codes are deleted in Contractor Foreman and imported from QuickBooks successfully." There is an "OK" button in the dialog box.

At the bottom of the wizard, there is a progress indicator: "Adding/Updating Cost Code (208/208) 000". There are "Back" and "Sync & Continue" buttons at the bottom of the window.

Now you'll see a screen similar to the one below. We will go through each screen one-by one.

This completes the integration, see page 33 (Connector Overview).

The screenshot displays the Contractor Foreman Integration Tool interface. The title bar at the top reads "Contractor Foreman Integration Tool" and includes a power icon, a minus sign, and an "X" icon. The left sidebar contains the Contractor Foreman logo and a menu with the following items: Sync (highlighted), Directories, Projects, Cost Codes, Settings, Log, Minimize, and Logout. The main content area is titled "Sync" and shows the "Beta Username: sgqbd21".

Sync type

- Manual
- Scheduled

Schedule sync at: 12:00:00 AM (Daily)

Do not send Unit of Measurement to QB (recommended if frequent U/M errors occur).

Data sync volume

- Full Sync
- Sync all existing items (Invoices, Bills, Estimates, Expenses, PO's, Time Cards). WARNING: This could result in duplicates if you have been adding these data into BOTH systems prior to integration.
- Partial Sync

From: Nov-13-2020

To: Nov-13-2020

Last Synced Time: 11/13/2020 10:52 AM

Sync

Version 1.0.119

Option 3

If you've been using QuickBooks Desktop and Contractor Foreman at the same time and have populated data in both, you will want to select this option so that you can link the records in CF to the similar records in QB.

As you start the process of syncing data, we will take you step-by-step through each screen to connect the data you have in CF with the data you have in QB.

Contractor Foreman Integration Tool

Setup Wizard

Select the option that best describes your current scenario.

- I am new to Contractor Foreman but already have QuickBooks with data in it that I want to import into Contractor Foreman (Most Popular).
- I am new to QuickBooks but already have a Contractor Foreman account and would like my data uploaded to QuickBooks.
- I have a QuickBooks and a Contractor Foreman account and both have data in it that I would like to link together (Sync Both Ways).

Back Continue

Link Employees

The first step is to match the Employees you have in your CF account to the Employees you have in your QB account. Keep in mind that the account admin will be sent to QB as an employee so that time card data (if any) can transfer. This is needed for better jobcosting data.

If records in both systems have the same name, the items will be matched automatically. But if you have Rob in one system and Robert in the other system, you will want to link those two items together so that both systems do not end up with a Rob and Robert record.

If you are on this screen and you realize the spelling of names needs to be revised, you can go do that now and once finished click on Refresh.

Link Employees X

Step 1) Employees Reset Link Refresh

- It's very important that you take the time now (before moving forward) to match your contacts in CF with your contacts in QB. If a record exists in one system but not the other, the record will be created and linked after continuing. By default we match records with the same First/Last name but you can Unlink as needed to correctly match.

Contractor Foreman	QuickBooks	Link / Unlink
Alex E. Boweman	Alex E. Boweman	UnLink
Amy E. Smith	Amy E. Smith	UnLink
Asking Kumar	Asking Kumar	UnLink
Austin E. Dillon	Austin E. Dillon	UnLink
Bill Johnson	Bill Johnson	UnLink
Billy Glover	Billy Glover	UnLink
Billy Madison	Billy Madison	UnLink
Brandon Jones	Brandon Jones	UnLink
Charles Bandy	Charles Bandy	UnLink
Gina Rockwell	Gina Rockwell	UnLink
Homer Simpson	Homer Simpson	UnLink
James Soloman	James Soloman	UnLink

Save and Continue

If a Employee Exists in one system but not in the other system, select the option “--Add New Entry--”. Doing so will create the record and link it once Save to Link is clicked.

Link Employees
X

Step 1) Employees

- It's very important that you take the time now (before moving forward) to match your contacts in CF with your contacts in QB. If a record exists in one system but not the other, the record will be created and linked after continuing. By default we match records with the same First/Last name but you can Unlink as needed to correctly match.

Reset Link

Refresh

Contractor Foreman	QuickBooks	Link / Unlink
Mike McCaugherty	Mike McCaugherty	UnLink
Natalie Grant	Natalie Grant	UnLink
Nazira SF	Nazira SF	UnLink
Randy Newbaugh	Randy Newbaugh	UnLink
Randy Nolan	Randy Nolan	UnLink
Sheena Gabbard	Sheena Gabbard	UnLink
Steve Gabbard	Steve Gabbard	UnLink
Steve Smith	--Add New Entry--	Save to Link
Tim Taylor	--Add New Entry--	UnLink
Tina E. Jackson	A&B;CD'EF'HI:JK L&M"OP/QR.ST#UV A&B;CD'EF'HI:JK L&M"OP/QR.ST#UV	UnLink
Tommy Jones	Adam Smith	UnLink
Tyler Perkins	Alex E. Boweman Amy E. Smith Asking Kumar Austin E. Dillon Bill Johnson	UnLink

Save and Continue

Link Employees



Employees


Reset Link

Refresh

- It's very important that you take the time now (before moving forward) to match your contacts in CF with your contacts in QB. If a record exists in one system but not the other, the record will be created and linked after continuing. By default we match records with the same First/Last name but you can Unlink as needed to correctly match.

Contractor Foreman	QuickBooks	Link / Unlink
Bill Johnson	Bill Johnson	UnLink
Billy Glover		UnLink
Billy Madison		UnLink
Brandon Jones		UnLink
Charles Bandy		UnLink
Chuck Todd		Save to Link
Gina Rockwell		UnLink
Homer Simpson		UnLink
James Soloman	James Soloman	UnLink
Johnny Bravo	Johnny Bravo	UnLink
Leroy Jackson	Leroy Jackson	UnLink
Luke Skywalker	Luke Skywalker	UnLink

Contractor Foreman Integration Tool

 Are you sure all Employee records have been correctly matched? Failure to do so will result in duplicates (and extra work)

Save and Continue


Link Employees

X

Employees

Reset LinkRefresh

- It's very important that you take the time now (before moving forward) to match your contacts in CF with your contacts in QB. If a record exists in one system but not the other, the record will be created and linked after continuing. By default we match records with the same First/Last name but you can Unlink as needed to correctly match.

Contractor Foreman	QuickBooks	Link / Unlink
<div data-bbox="772 483 1306 786"><p>Contractor Foreman Integration Tool X</p><p> Employees are synced successfully.</p><p>OK</p></div>		

Save and Continue

Customers

The process for Customers is the same as mentioned above with Employees. Here you will see the records showing as “Company (First Last)”.

Link Customers X

Customers Reset Link Refresh

- It's very important that you take the time now (before moving forward) to match your contacts in CF with your contacts in QB. If a record exists in one system but not the other, the record will be created and linked after continuing. By default we match records with the same First/Last name but you can Unlink as needed to correctly match.

Contractor Foreman	QuickBooks	Link / Unlink
5555555555 (Add Test)	5555555555 (Add Test) ▼	UnLink
A New CF Customer (Tomy Jones)	--Add New Entry-- ▼	Save to Link
abc (Johnson Kumar)	abc (Johnson Kumar) ▼	UnLink
Adrienne Cullen	Adrienne Cullen ▼	UnLink
Advent Retirement Center (Tina Ball)	Advent Retirement Center (Tina Ball) ▼	UnLink
Allied Maintenance Inc. (Archived)	--Add New Entry-- ▼	Save to Link
Amazing Builds (Henry Jones)	Amazing Builds (Henry Jones) ▼	UnLink
American Airlines	American Airlines ▼	UnLink
Andrew-Jacobs Construction	Andrew-Jacobs Construction ▼	UnLink
Arjun Reddy (Arjun Reddy)	Arjun Reddy (Arjun Reddy) ▼	UnLink
Arrisbrook	Arrisbrook ▼	UnLink
Associated Builders Inc.	Associated Builders Inc. ▼	UnLink

Save and Continue

Link Customers



Customers

Reset Link

Refresh

- It's very important that you take the time now (before moving forward) to match your contacts in CF with your contacts in QB. If a record exists in one system but not the other, the record will be created and linked after continuing. By default we match records with the same First/Last name but you can Unlink as needed to correctly match.

Contractor Foreman

QuickBooks

Link / Unlink

Contractor Foreman Integration Tool



Customers are synced successfully.

OK

Save and Continue

Vendors

Follow the same process for Vendors.

Link Vendors X

Vendors Reset Link Refresh

- It's very important that you take the time now (before moving forward) to match your contacts in CF with your contacts in QB.
If a record exists in one system but not the other, the record will be created and linked after continuing. By default we match records with the same First/Last name but you can Unlink as needed to correctly match.

Contractor Foreman	QuickBooks	Link / Unlink
Spelling Brothers Tile	Spelling Brothers Tile	UnLink
Stika Concrete		UnLink
Sundstone Roofing		UnLink
TA		UnLink
Tax Agency		UnLink
Ted V. Cruz		UnLink
TPT123 (Naga Bushan)		UnLink
v(é), (è), (â, î ô), (ñ), ü ī (V é), (è) V (â, î ô), (UnLink
Weenggs Technology (Seema Developer)	Weenggs Technology (Seema Developer)	UnLink
Willey Roofing & Thermal Protection	Willey Roofing & Thermal Protection	UnLink
Willey Roofing & Thermal Protection (Willey Roofing & Thermal Pro...	Willey Roofing & Thermal Protection (Willey Roofing & Thermal ...	UnLink
Yudhistar	Yudhistar	UnLink

Contractor Foreman Integration Tool X

Are you sure all Vendor records have been correctly matched?
Failure to do so will result in duplicates (and extra work)

Yes No

Save and Continue

Link Vendors



Vendors

Reset Link

Refresh

- It's very important that you take the time now (before moving forward) to match your contacts in CF with your contacts in QB.
If a record exists in one system but not the other, the record will be created and linked after continuing. By default we match records with the same First/Last name but you can Unlink as needed to correctly match.

Contractor Foreman

QuickBooks

Link / Unlink

Contractor Foreman Integration Tool




Vendors are synced successfully.

OK

Save and Continue

Projects

To prevent duplicate projects, it's very important that you take the time to link projects that appear in both systems. This process will be completed the same way as done above with contacts. Since we do not import existing project data and financials from QB to CF, we will only give you the option to link projects that exists in CF to projects that exists in QB.

 **Link Project** X

Projects Refresh List

● Unlike Contractor Foreman, QuickBooks restricts Project Names to 41 characters. It may be necessary to link a full-text CF Project to a clipped-text QB Project.

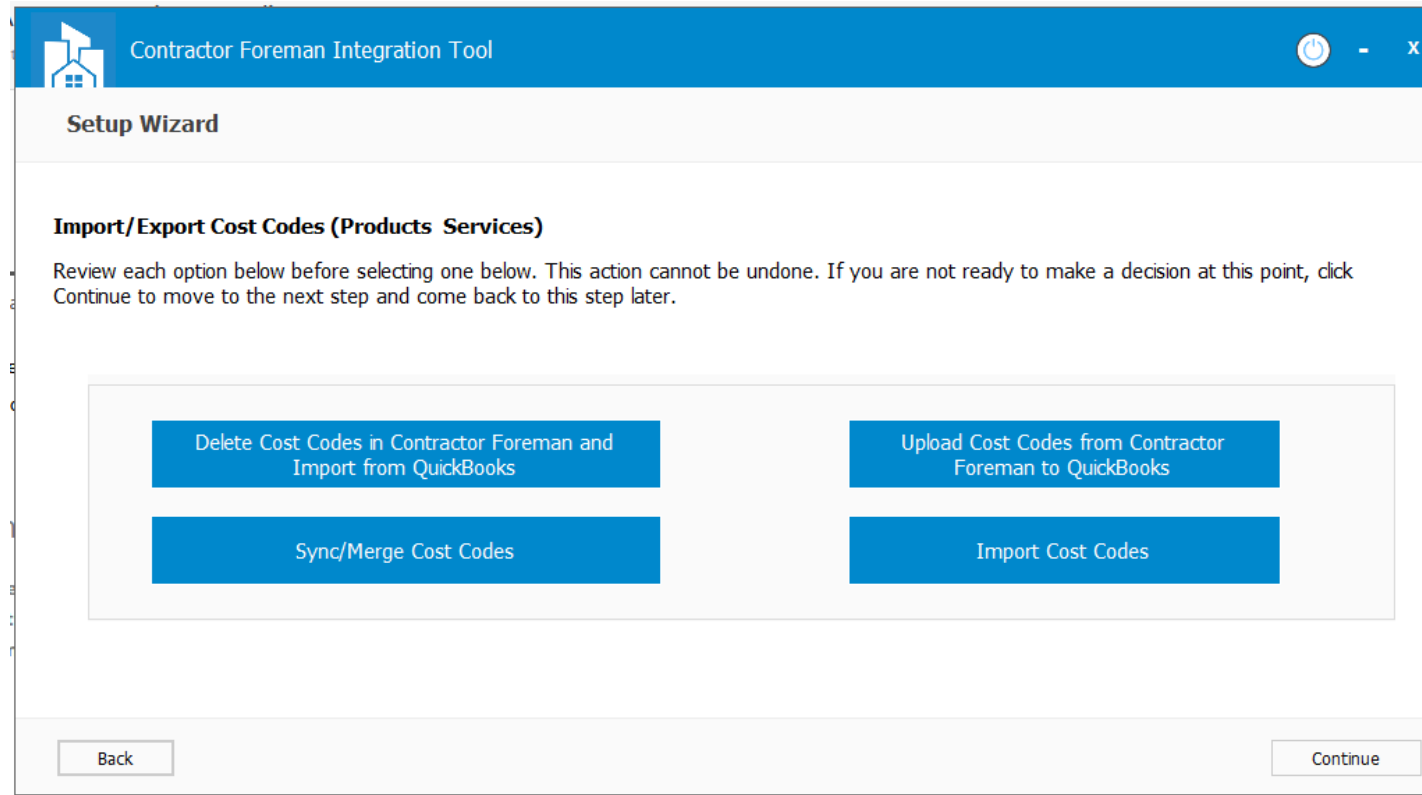
Contractor Foreman	QuickBooks	Link / Unlink
3002	3002	UnLink
700	700	UnLink
7000	7000	UnLink
8249 - Data Center	8249 - Data Center	UnLink
A New CF Project	--Add New Entry--	Save to Link
AA Conv	AA Conv	UnLink
AB-10-007-001	AB-10-007-001	UnLink
AHC - 001	AHC - 001	UnLink
AIA	AIA	UnLink
AJC-001	AJC-001	UnLink
BCM	BCM	UnLink
Billings Exterior	Billings Exterior	UnLink
BRUG	BRUG	UnLink
C2010-013	C2010-013	UnLink

Save and Continue

Cost Codes


Most sync errors are due to cost codes not being matched correctly. If you've been using QB and CF at the same time and each system has their own set of cost codes, it is recommended that you take the time and decide which system has the data you want to continue with. (This is often determined by which has been used the most which will normally be QuickBooks.) You have a couple options here – you can replace the codes in one system with the codes in the other system or you can modify both lists to make them match. If the data is similar, modifying both systems manually (to match the other system) will be the best option so that any existing item using those codes will still reference them.

- **Sync/Merge Cost Codes:** This option is used to match the QB version of the cost code to the CF version of the cost code.
- **Import Cost Codes:** This will import your cost codes from QB to CF. You'll be asked if you want to delete the existing codes in CF. In most cases you will want to select 'Yes'.
- **Upload from CF to QB:** Although it's not used often, this tool allows you to upload your CF list of cost codes to QB. This would mainly be used by someone new to QB.



Sync/Merge Cost Codes

When syncing and merging cost codes, the Parent and Child code will show in the format “Parent:Child” to make it easier to confirm that the items are in the correct matching format. If a code is linked incorrectly, you will Unlink it and select the correct record (just as we’ve done before with Contacts and Projects). If needed, go to the child code details in CF and reassign it to the correct Parent code.

 Link Cost Codes
X

Cost Codes

- Unlike Contractor Foreman, QuickBooks restricts Item Names to 31 characters. It may be necessary to link a full-text CF item to a clipped-text QB item.

Contractor Foreman	QuickBooks	Link / Unlink
Electrical Power Generation	Electrical Power Generation	UnLink
Electrical Power Generation:Commissioning of Electrical Pow	Electrical Power Generation:Commissioning of Electrical Pow	UnLink
Electrical Power Generation:Common Work Results for Electri	Electrical Power Generation:Common Work Results for Electri	UnLink
Electrical Power Generation:Instrumentation and Control for (Archived)	Electrical Power Generation:Instrumentation and Control for (Archi...	UnLink
Electrical Power Generation:Operation and Maintenance for E	Electrical Power Generation:Operation and Maintenance for E	UnLink
Electrical Power Generation:Schedules for Electrical Power	Electrical Power Generation:Schedules for Electrical Power	UnLink
Electrical:Boxes	Electrical:Boxes	UnLink
Electrical:Cable Trays	Electrical:Cable Trays	UnLink
Electrical:Conduit	Electrical:Conduit	UnLink
Electrical:Conduit & Tubing	Electrical:Conduit & Tubing	UnLink
Electrical:Cutting And Drilling	Electrical:Cutting And Drilling	UnLink
Electrical:Encl Switches	Electrical:Encl Switches	UnLink
Electrical:Encl Switches & Circuit Breaker	Electrical:Encl Switches & Circuit Breaker	UnLink
Electrical:Exterior Luminaires	Electrical:Exterior Luminaires	UnLink
Electrical:Grounding	Electrical:Grounding	UnLink
Electrical:Grounding & Bonding	Electrical:Grounding & Bonding	UnLink

This completes the integration, see page 33 (Connector Overview).

Connector Overview

The default values are recommend and used by most people and are the best option to start with.

NOTE: If an updated version is available, you'll see it mentioned beside the Version number in the bottom left.

The screenshot displays the Contractor Foreman Integration Tool interface. The title bar reads "Contractor Foreman Integration Tool" and includes a power icon, a minus sign, and an "X" icon. The top right corner features a "Logout" button. The left sidebar contains the Contractor Foreman logo and a menu with options: Sync (highlighted), Directories, Projects, Cost Codes, Settings, Log, Minimize, and Logout. The main content area is titled "Sync" and shows the following settings:

- Beta Username:** sgqbd21
Username:
- Sync type:**
 - Manual** Run the sync manually (by clicking sync). Recommend at first until everything is working as planned.
 - Scheduled** Allows you to schedule when the automatic sync should take place.
 - Schedule sync at: 12:00:00 AM (Daily)
 - Do not send Unit of Measurement to QB (recommended if frequent U/M errors occur).
- Data sync volume:**
 - Full Sync** This is the most common option to sync all data going forward.
 - Sync all existng items (Invoices, Bills, Estimates, Expenses, PO's, Time Cards). WARNING: This could result in duplicates if you have been adding these data into BOTH systems prior to integration. This would only be used by someone who is new to QB but has been using CF in the past.
 - Partial Sync** This is less common and only used when someone wants to sync data for a certain period of time.
 - From: Nov-13-2020
 - To: Nov-13-2020

At the bottom left, it shows "Version 1.0.119". At the bottom right, there is a "Sync" button with the text "This starts the sync process" below it. The status "Last Synced Time: 11/13/2020 10:52 AM" is displayed above the text "When the last sync took place".

Directories

The Directories section is where you will sync records that were matched incorrectly. If an item is not linked correctly, click Unlink from this screen. Then you'll select the correct CF record and select the correct QB record and Link the two together.

- Clicking Reset Link removes the existing link (based on the contact type selected). This applies to all contacts in the list. This is not used often.
- The 'Sync' button applies any changes that were made on this screen.
- Refresh is used to bring in new changes that you may have made in CF or QB in the background (such as cleaning up a misspelling).

The screenshot shows the Contractor Foreman Integration Tool interface. At the top, there is a blue header with the tool's name and a power icon. Below the header, there are three buttons: "Reset Link", "Sync Employees", and "Refresh". A "Select Directory" section has radio buttons for "Employee" (selected), "Customer", and "Vendor". A warning message states: "It's very important that you take the time now (before moving forward) to match your contacts in CF with your contacts in QB. If a record exists in one system but not the other, the record will be created and linked after continuing. By default we match records with the same First/Last name but you can Unlink as needed to correctly match." Below this is a table with columns for "Contractor Foreman", "QuickBooks", and "Link / Unlink". The table lists 14 contacts, each with an "UnLink" button in the "Link / Unlink" column. A sidebar on the left contains navigation options: Sync, Directories (highlighted), Projects, Cost Codes, Settings, Log, Minimize, and Logout. The version number "Version 1.0.119" is displayed at the bottom left.

Contractor Foreman	QuickBooks	Link / Unlink
Adam Smith	Adam Smith	UnLink
Alex E. Boweman	Alex E. Boweman	UnLink
Amy E. Smith	Amy E. Smith	UnLink
Asking Kumar	Asking Kumar	UnLink
Austin E. Dillon	Austin E. Dillon	UnLink
Bill Johnson	Bill Johnson	UnLink
Billy Glover	Billy Glover	UnLink
Billy Madison	Billy Madison	UnLink
Brandon Jones	Brandon Jones	UnLink
Charles Bandy	Charles Bandy	UnLink
Gina Rockwell	Gina Rockwell	UnLink
Homer Simpson	Homer Simpson	UnLink
James Soloman	James Soloman	UnLink
Johnny Bravo	Johnny Bravo	UnLink
Leroy Jackson	Leroy Jackson	UnLink

Here's an example where we have a contact in CF that doesn't exist in QB. We have the option to link the contact to an existing record in QB or we can create a new entry in QB.

Contractor Foreman Integration Tool

-
X

Select Directory Employee Customer Vendor

It's very important that you take the time now (before moving forward) to match your contacts in CF with your contacts in QB. If a record exists in one system but not the other, the record will be created and linked after continuing. By default we match records with the same First/Last name but you can Unlink as needed to correctly match.

Reset Link

Sync Employees

Refresh

	Contractor Foreman	QuickBooks	Link / Unlink
Sync	Mark Richards	Mark E Richards	UnLink
Directories	Michael E. Angeloo	Michael E. Angeloo	UnLink
Projects	Mike McCaugherty	Mike McCaugherty	UnLink
Cost Codes	Natalie Grant	Natalie Grant	UnLink
Settings	Nazira SF	Nazira SF	UnLink
	QW QT	--Add New Entry--	Save to Link
	Randy Newbaugh	--Add New Entry--	UnLink
Log	Randy Nolan	A&B;CD'EF'HI:JK L&M"OP/QR.ST#UV	UnLink
Minimize	Sheena Gabbard	A&B;CD'EF'HI:JK L&M"OP/QR.ST#UV	UnLink
Logout	Steve Gabbard	Adam Smith	UnLink
	Steve Smith	Alex E. Boweman	UnLink
	Tim Taylor	Amy E. Smith	UnLink
	Tina E. Jackson	Asking Kumar	UnLink
	Tommy Jones	Austin E. Dillon	UnLink
	Tyler Perkins	Bill Johnson	UnLink
		Billy Glover	UnLink
		Billy Madison	UnLink
		Brandon Jones	UnLink
		Charles Bandy	UnLink
		Gina Rockwell	UnLink
		Homer Simpson	UnLink
		James Soloman	UnLink
		Johnny Bravo	UnLink
		Leroy Jackson	UnLink

Version 1.0.119

Projects

There may arise the need to manually revise the way Projects in CF and Projects in QB are linked. Just like with the Directories tab, you can do the same from here.

Keep in mind that QB limits Project names to 41 characters. If a project in CF has a name longer than 41 characters, QB will reduce the project name. It is recommended to be proactive with this and change it in CF prior to integration.

Contractor Foreman Integration Tool

Projects Sync Projects Refresh List

● Unlike Contractor Foreman, QuickBooks restricts Project Names to 41 characters. It may be necessary to link a full-text CF Project to a clipped-text QB Project.

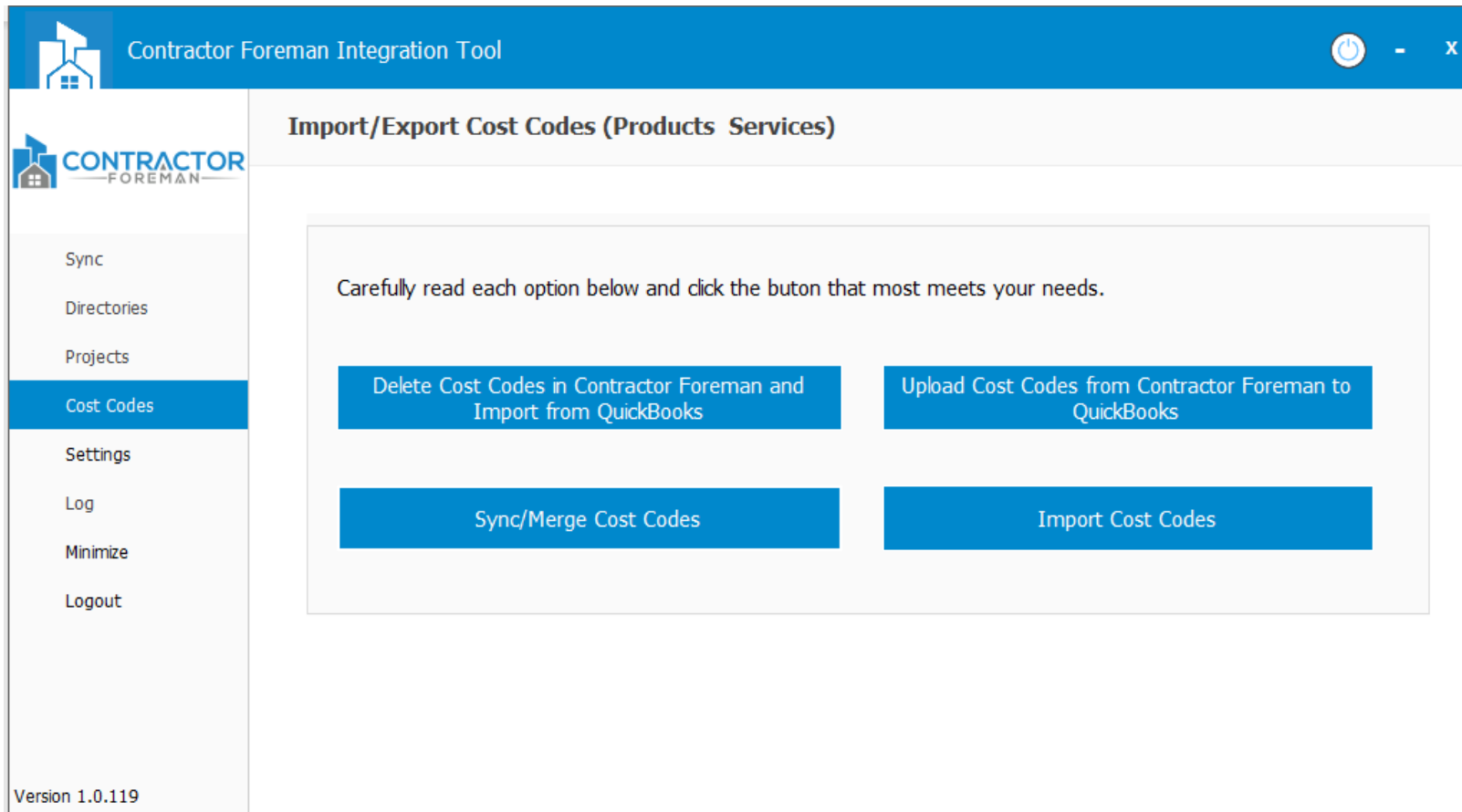
Contractor Foreman	QuickBooks	Link / Unlink
039-2015-001	039-2015-001	UnLink
101	101	UnLink
10-290	10-290	UnLink
1064	1064	UnLink
13362	13362	UnLink
14-00001	14-00001	UnLink
14-005	14-005	UnLink
14-082	14-082	UnLink
14-0996	14-0996	UnLink
14-100-001	14-100-001	UnLink
14-999	14-999	UnLink
15.0000.01-001	15.0000.01-001	UnLink
15005	15005	UnLink
15-025-001	15-025-001	UnLink
1503-001	1503-001	UnLink

Version 1.0.119

Cost Codes

There may arise a need for you to make changes to the way your cost codes are synced between CF and QB. If needed, this is where it will be done. As long as the sync process was correct in the initial integration, this will most likely not be a section you'll need to utilize.

- **Sync/Merge Cost Codes:** This tool is used to match the QB version of the cost code to the CF version of the cost code.
- **Import Cost Codes:** This will import your cost codes from QB to CF. You'll be asked if you want to delete the existing codes in CF. In most cases you will want to select 'Yes'.
- **Upload from CF to QB:** Although it's not used often, this tool allows you upload your CF list of cost codes to QB. This would mainly be used by someone new to QB.




The screenshot displays the Contractor Foreman Integration Tool interface. The title bar reads "Contractor Foreman Integration Tool". The main content area is titled "Import/Export Cost Codes (Products Services)". Below the title, there is a instruction: "Carefully read each option below and click the buton that most meets your needs." (Note: "buton" is misspelled in the original image). There are four blue buttons arranged in a 2x2 grid:

- Top-left: Delete Cost Codes in Contractor Foreman and Import from QuickBooks
- Top-right: Upload Cost Codes from Contractor Foreman to QuickBooks
- Bottom-left: Sync/Merge Cost Codes
- Bottom-right: Import Cost Codes

The left sidebar contains a navigation menu with the following items: Sync, Directories, Projects, Cost Codes (highlighted), Settings, Log, Minimize, and Logout. The version number "Version 1.0.119" is displayed at the bottom left of the sidebar.

Cost Codes: Sync/Merge Cost Codes

When syncing and merging cost codes, the Parent and Child code will show in the format “Parent:Child” to make it easier to confirm that the items are in the correct matching format. If a code is linked incorrectly, you will Unlink it and select the correct record (just as we’ve done before with Contacts and Projects).

 Link Cost Codes
X

Cost Codes

- Unlike Contractor Foreman, QuickBooks restricts Item Names to 31 characters. It may be necessary to link a full-text CF item to a clipped-text QB item.

Reset Link

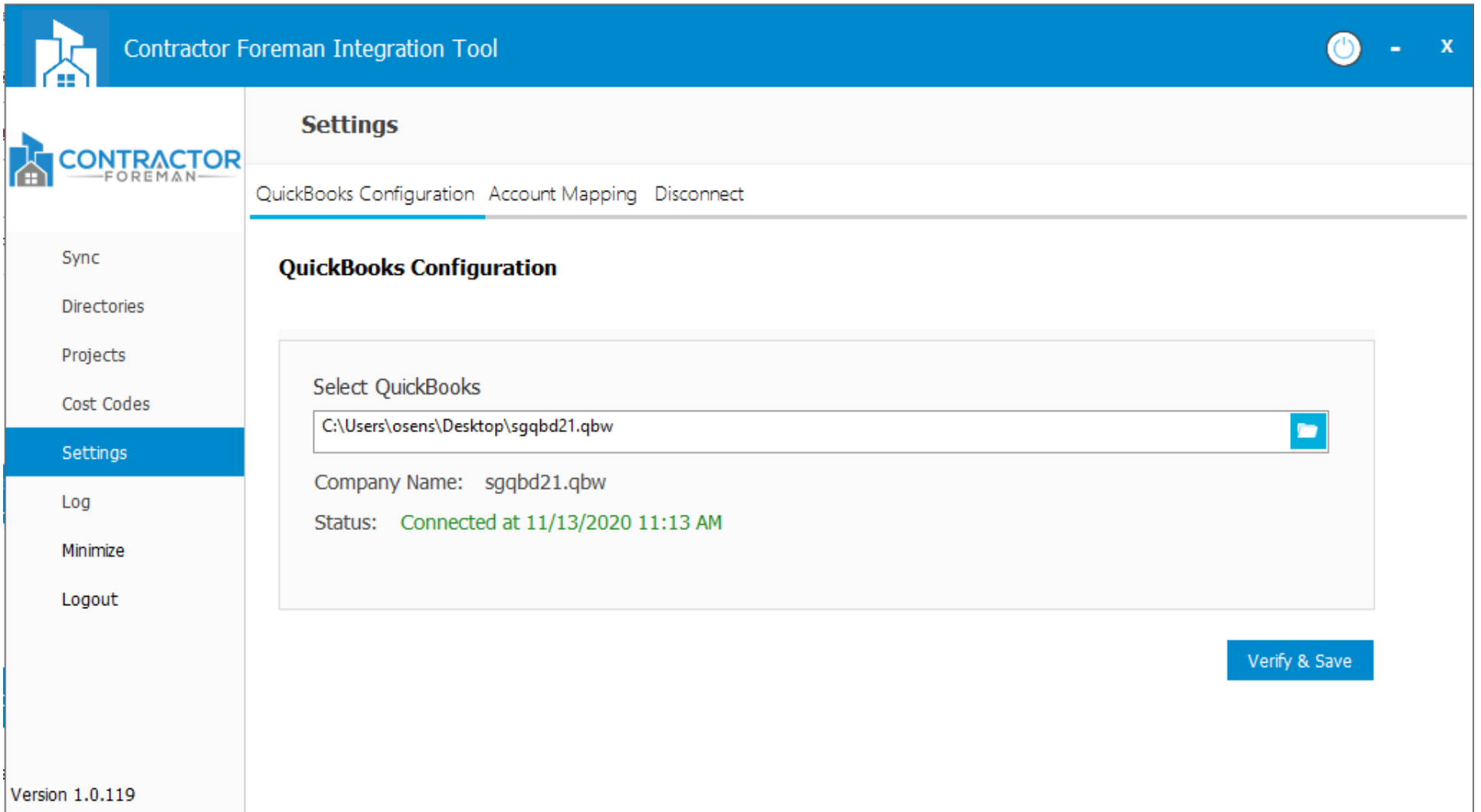
Sync Cost Code

Refresh List

Contractor Foreman	QuickBooks	Link / Unlink
Electrical Power Generation	Electrical Power Generation ▾	UnLink
Electrical Power Generation:Commissioning of Electrical Pow	Electrical Power Generation:Commissioning of Electrical Pow ▾	UnLink
Electrical Power Generation:Common Work Results for Electri	Electrical Power Generation:Common Work Results for Electri ▾	UnLink
Electrical Power Generation:Instrumentation and Control for (Archived)	Electrical Power Generation:Instrumentation and Control for (Archi... ▾	UnLink
Electrical Power Generation:Operation and Maintenance for E	Electrical Power Generation:Operation and Maintenance for E ▾	UnLink
Electrical Power Generation:Schedules for Electrical Power	Electrical Power Generation:Schedules for Electrical Power ▾	UnLink
Electrical:Boxes	Electrical:Boxes ▾	UnLink
Electrical:Cable Trays	Electrical:Cable Trays ▾	UnLink
Electrical:Conduit	Electrical:Conduit ▾	UnLink
Electrical:Conduit & Tubing	Electrical:Conduit & Tubing ▾	UnLink
Electrical:Cutting And Drilling	Electrical:Cutting And Drilling ▾	UnLink
Electrical:Encl Switches	Electrical:Encl Switches ▾	UnLink
Electrical:Encl Switches & Circuit Breaker	Electrical:Encl Switches & Circuit Breaker ▾	UnLink
Electrical:Exterior Luminaires	Electrical:Exterior Luminaires ▾	UnLink
Electrical:Grounding	Electrical:Grounding ▾	UnLink
Electrical:Grounding & Bonding	Electrical:Grounding & Bonding ▾	UnLink

Settings

Normally it's not necessary to make a change to the Settings. If you move the location of your QB file, this is where you will reconfigure the connector.



The screenshot shows a window titled "Contractor Foreman Integration Tool" with a blue header bar. On the left is a sidebar with the "CONTRACTOR FOREMAN" logo and a menu with options: Sync, Directories, Projects, Cost Codes, Settings (highlighted), Log, Minimize, and Logout. The main content area is titled "Settings" and has three tabs: "QuickBooks Configuration" (selected), "Account Mapping", and "Disconnect". Under "QuickBooks Configuration", there is a section titled "Select QuickBooks" with a text input field containing the path "C:\Users\osens\Desktop\sgqbd21.qbw" and a folder selection icon. Below the input field, it displays "Company Name: sgqbd21.qbw" and "Status: Connected at 11/13/2020 11:13 AM". A "Verify & Save" button is located at the bottom right of the configuration area. The version number "Version 1.0.119" is visible in the bottom left corner of the window.

Account Mapping

Here you can revise the default values you assigned during the integration. If you select 'No' Tax Agency and later realize that your selected taxes are not transferring, this is where you will enable the Tax feature.

Tax Agency: This will only show Vendors who are setup as a Tax Agency (Vendor Record > Edit > Additional Info > Vendor Type)

UK/CA Customers: You may be required to select a Sales Tax Return line within the Account Mapping field.

The screenshot shows the 'Contractor Foreman Integration Tool' interface. The top navigation bar is blue with the tool's name and a power icon. Below it is a 'Settings' section with a breadcrumb trail: 'QuickBooks Configuration > Account Mapping > Disconnect'. The 'Account Mapping' page features a sidebar on the left with options: Sync, Directories, Projects, Cost Codes, Settings (highlighted), Log, Minimize, and Logout. The main content area is titled 'Account Mapping' and includes a 'Refresh QuickBooks' button. The settings are organized into several sections: 'Products and Services Default Account' (set to 'Construction Income'), 'Invoices (Payment Deposits Account)' (set to 'Accounts Receivable'), 'Bills (Payment Bank/Credit Account)' (set to 'Checking PNC'), 'Expenses (Account)' (set to 'Uncategorized Expenses'), and 'Sales Tax Item Agency' (set to 'Tax Agency'). A 'Do I have Sales Tax Agency setup?' section has radio buttons for 'Yes' (selected) and 'No'. A 'Verify & Save' button is located at the bottom right. The version number 'Version 1.0.119' is displayed in the bottom left corner.

Contractor Foreman Integration Tool

Settings

QuickBooks Configuration Account Mapping Disconnect

Account Mapping Refresh QuickBooks

Products and Services Default Account ?
Construction Income

Invoices (Payment Deposits Account) ?
Accounts Receivable

Do I have Sales Tax Agency setup?
 Yes
 No

Bills (Payment Bank/Credit Account) ?
Checking PNC

Expenses (Account) ?
Uncategorized Expenses

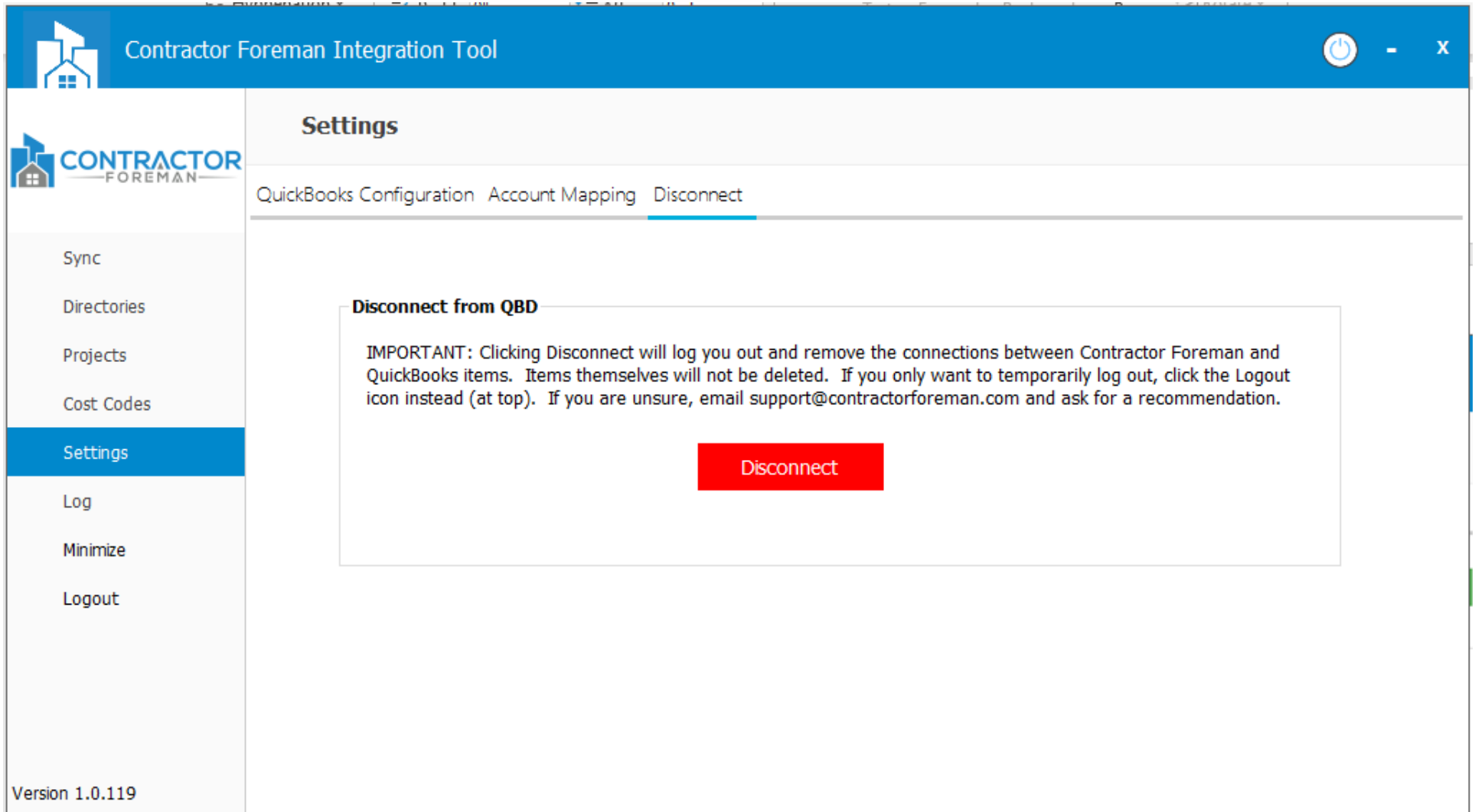
Sales Tax Item Agency ?
Tax Agency

Verify & Save

Version 1.0.119

Disconnect

In the event that you need to disconnect from QBD, you will need to click the red button. Doing this will delete the reference links. Meaning, if you were to reconnect later you would have to go through the integration again. Do not use this feature if you simply need to logout for a short term. If you are not sure which option is best, email support@contractorforeman.com and provide the details and we will help.



The screenshot shows the Contractor Foreman Integration Tool interface. The top bar is blue with the title "Contractor Foreman Integration Tool" and window control icons. The left sidebar contains the Contractor Foreman logo and a menu with options: Sync, Directories, Projects, Cost Codes, Settings (highlighted), Log, Minimize, and Logout. The main content area is titled "Settings" and has three tabs: "QuickBooks Configuration", "Account Mapping", and "Disconnect" (selected). A warning box titled "Disconnect from QBD" contains the following text: "IMPORTANT: Clicking Disconnect will log you out and remove the connections between Contractor Foreman and QuickBooks items. Items themselves will not be deleted. If you only want to temporarily log out, click the Logout icon instead (at top). If you are unsure, email support@contractorforeman.com and ask for a recommendation." Below the text is a prominent red "Disconnect" button. The version number "Version 1.0.119" is visible in the bottom left corner of the interface.

Log

The transaction logs are a great tool to keep you informed on what is happening with your data. The Application Log tab shows the successful items that have transferred. Any items that did not transfer will appear in the Error Log tab. An explanation will also be provided letting you know why the item did not sync and what needs to be revised to make the record sync. You can also access the Transaction Log from the CF Menu.

Contractor Foreman Integration Tool

View Log [Log Folder] [Clear Log]

Application Log Error Log





- 11/13/2020 02:40 PM: QB to CF: Expense account created successfully. Account name: Office Supplies
- 11/13/2020 02:40 PM: QB to CF: Expense account created successfully. Account name: Payroll Expenses
- 11/13/2020 02:40 PM: QB to CF: Expense account created successfully. Account name: Professional Fees
- 11/13/2020 02:40 PM: QB to CF: Expense account created successfully. Account name: Rent Expense
- 11/13/2020 02:40 PM: QB to CF: Expense account created successfully. Account name: Repairs and Maintenance
- 11/13/2020 02:40 PM: QB to CF: Expense account created successfully. Account name: Telephone Expense
- 11/13/2020 02:40 PM: QB to CF: Expense account created successfully. Account name: Utilities
- 11/13/2020 02:40 PM: QB to CF: Expense account created successfully. Account name: Uncategorized Expenses
- 11/13/2020 02:40 PM: QB to CF: OtherExpense account created successfully. Account name: Ask My Accountant
- 11/13/2020 02:40 PM: CF to QB: Employee created successfully: QW QT
- 11/13/2020 02:41 PM: Manual process completed at - 11/13/2020 02:41 PM
- 11/13/2020 03:46 PM: Sync started at - 11/13/2020 3:46:49 PM
- 11/13/2020 03:47 PM: Manual process completed at - 11/13/2020 03:47 PM

Version 1.0.119

Log Folder

It may be necessary at times for you to send us your error logs so that we can better diagnose a problem. To do this, go to the Connector > Log > Log Folder (button) > Click on the Month. Then send us the three text files (as seen below).

Acer (C:) > ProgramData > EST > Contractor Foreman Integration Tool > Logs > November 2020

Name	Date modified	Type	Size
 sqqbd17 (35647) 11.13.2020 11.02.24 AM	11/13/2020 11:02 AM	File folder	
 APILog.txt	11/13/2020 3:47 PM	Text Document	201 KB
 ApplicationLog.txt	11/13/2020 3:47 PM	Text Document	51 KB
 ErrorLog.txt	11/13/2020 11:02 AM	Text Document	1 KB

This is the end of the guide.

Is something missing? Is there a topic we could have covered in more detail that would have been beneficial? If so, please mention it so that we can immediately improve this guide.

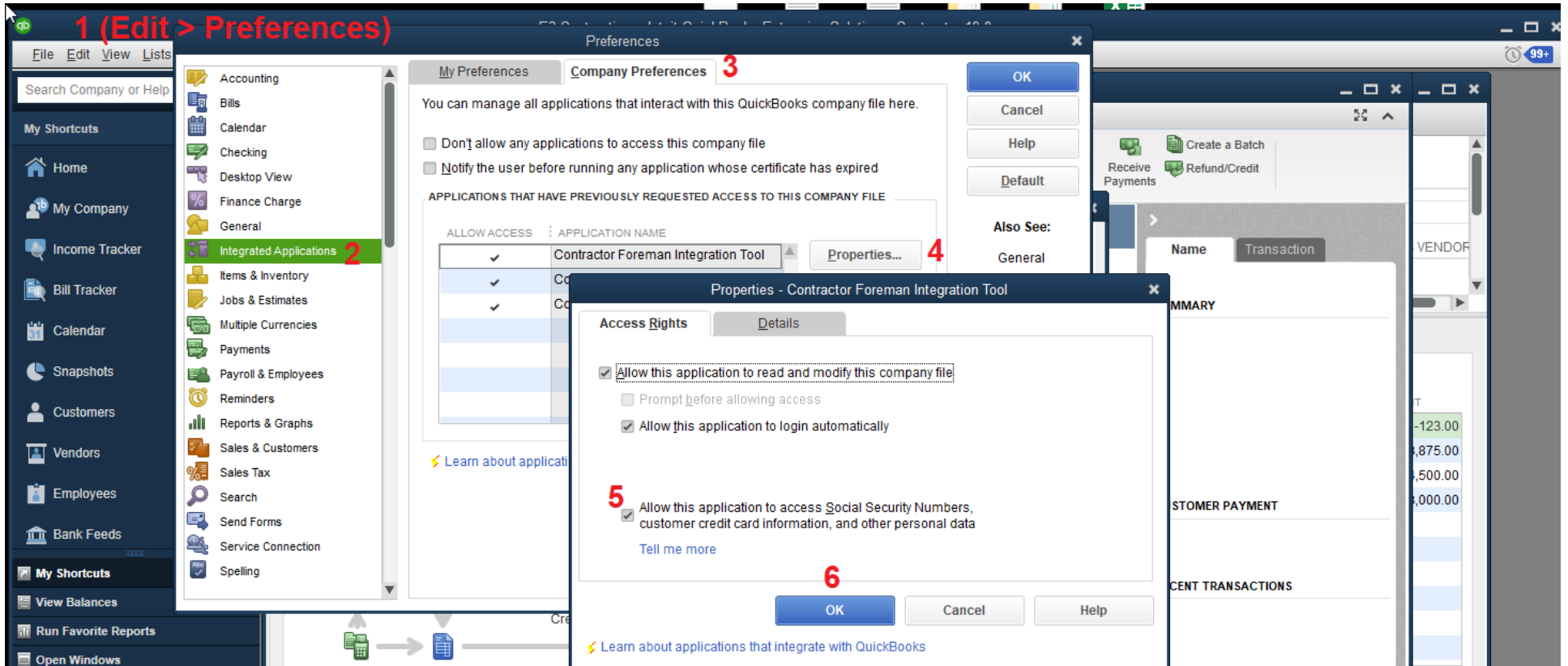
support@contractorforeman.com

QuickBooks Integration Checklists

- Watch the Integration Overview Video
- Read the Full Integration Guide
- Prep Data
 - Archive Old Data
 - Properly Format Cost Codes (Make sure all codes are in a two-tier format)
 - Check Spelling of Contact and Cost Codes (so they can merge/sync)
- Review Troubleshooting Items

Troubleshooting

CF to QB: Failed to update Employee: James Bond. Reason: The integrated application has no permission to access personal data. The QuickBooks administrator can grant permission to access personal data through the Integrated Application preferences..



Some of my items are not syncing.

Think of the sync process as a chain. If your Customer doesn't sync, the Project will not sync. If your Project does not sync, the Time Card will not sync. When an item doesn't sync, but most others do, it's due to one of the items in the chain not being synced. This is usually a contact or a cost code. Confirm that the items are syncing correctly.

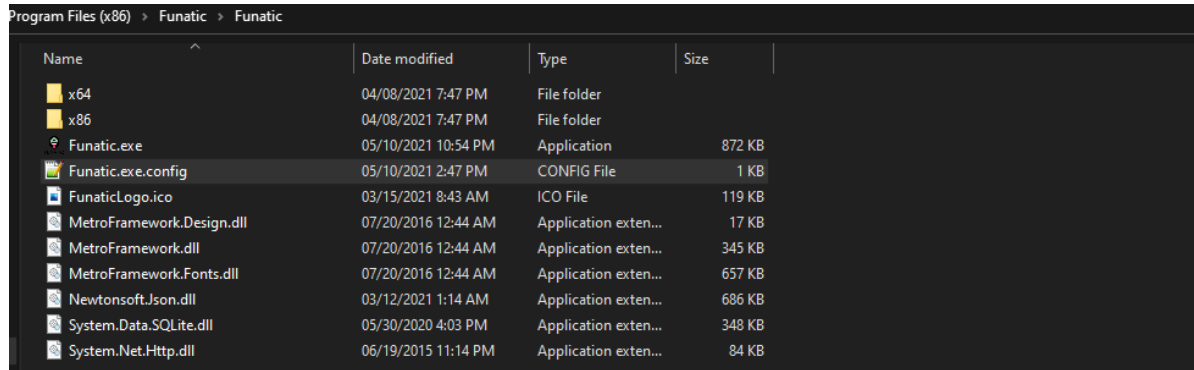
Time Card creation failed for Employee: John Doe (05/17/2021). Reason: This feature is not enabled or not available in this version of QuickBooks.

Please go to the following location and enable the full payroll. Edit >> Preferences >> Payroll & Employees >> Company Preferences

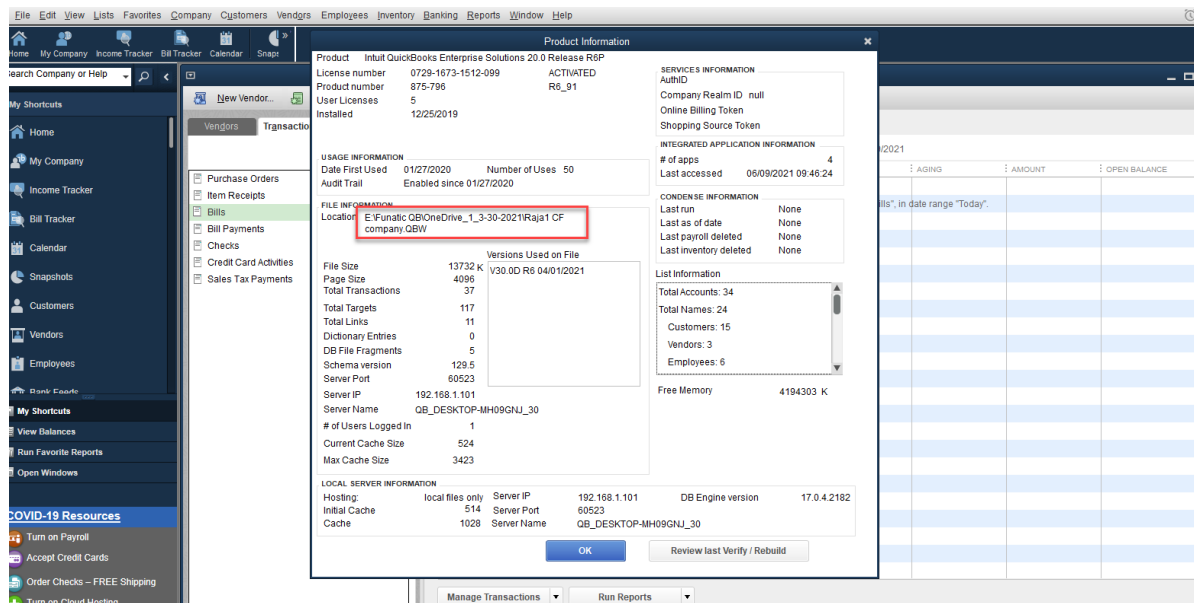
The screenshot shows the 'Preferences' dialog box with the 'Company Preferences' tab selected. The 'Payroll & Employees' category is highlighted in the left sidebar. Under 'QUICKBOOKS DESKTOP PAYROLL FEATURES', the 'Manual Payroll' option is selected and highlighted with a red arrow. Other options include 'Full payroll', 'No payroll', and 'Online payroll'. Below this, there are checkboxes for 'Copy earnings details from previous paycheck', 'Recall quantity field on paychecks', 'Recall hour field on paychecks', and 'Job Costing and Item tracking for paycheck expenses'. The 'SET PREFERENCES FOR' section includes buttons for 'Pay Stub & Voucher Printing', 'Workers Compensation', and 'Sick and Vacation'. At the bottom, there are options for 'DISPLAY EMPLOYEE LIST BY' (First Name or Last Name) and a warning message: 'Changing the employee name display preferences will cause all QuickBooks Desktop windows to close. Please finish paying your employees before you do this.' The 'Also See' section on the right lists 'General' and 'Tax:1099'. Buttons for 'OK', 'Cancel', 'Help', and 'Default' are visible on the right side.

How to Move QB Connector to Another Computer (without losing previous sync logs).

- Install the connector on the new system. When asked to login, stop there (do not login).
- Go the following location of your system (1) - **C:\ProgramData\EST**.

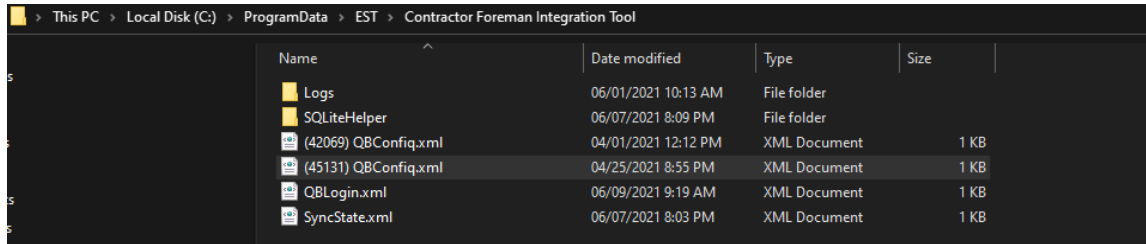


- Copy the EST folder from the old system and move it to the new System (2) with the same location (**C:\ProgramData**).
- Open the QB file in your System (2). Then press F2. Now you can see the QB details. Please copy the file path.

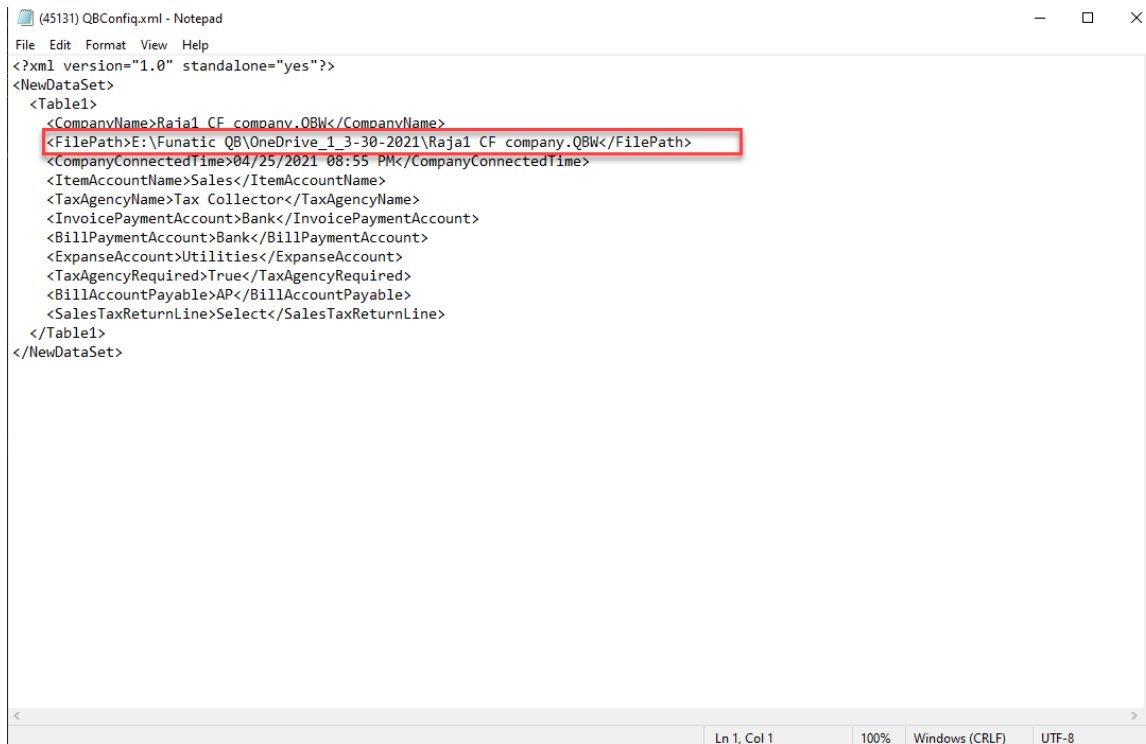


→ Once you copy the file path, go the following location on your new System.

C:\ProgramData\EST\Contractor Foreman Integration Tool



→ Edit all instances of QBConfiq.xml file with notepad and change the path.



→ Save the changes and close notepad.

→ Open the Contractor Foreman Sync Tool. Now you will able to sync without an issue.

QuickBooks Enterprise 2022 (or greater) will not Install

The recent versions of QuickBooks Enterprise are 64-bit versions which require an additional patch to be installed. If you are having problems during the integration, install the patch. Not doing so will prevent the chart of accounts list from loading. You can download it here:

<https://www.contractorforeman.com/qbd/qbdsdk160.exe>

QuickBooks Connection Failed Error

If you are receiving an error such as the one below, install this file to correct the issue. https://www.contractorforeman.com/qbd/QBFC16_0Installer.zip

The screenshot shows the Contractor Foreman Integration Tool Setup Wizard. The window title is "Contractor Foreman Integration Tool". The main content area is titled "Setup Wizard" and "QuickBooks Configuration". It displays the following information:

- Select QuickBooks file: C:\Users\Public\Documents\Intuit\QuickBooks\
- Company Name: Contractor Foreman Inc
- Status: Connected at 01-12-2024 11:20

A red-bordered dialog box is overlaid on the screen, titled "Contractor Foreman Integration Tool". It contains a yellow warning icon and the following text:

QuickBooks connection failed. Reason: Retrieving the COM class factory for component with CLSID {6CE1D767-68BF-4F35-8EDD-9CACD8E38481} failed due to the following error: 80040154 Class not registered (Exception from HRESULT: 0x80040154 (REGDB_E_CLASSNOTREG)).

Below the dialog box, there is a "Help Content:" section with three bullet points:

- Log in as a QuickBooks Administrator in QuickBooks.
- Allow QuickBooks certification by using Verify and Continue option at the bottom once QB file path is applied.
- Open required QuickBooks company file or paste the opened QuickBooks file path along with .QBW extension in the select QuickBooks file path area.

At the bottom of the wizard, there is a "Connecting to QuickBooks..." status bar and two buttons: "Back" and "Select Company File and Verify and Continue".