

WHAT'S NEW IN

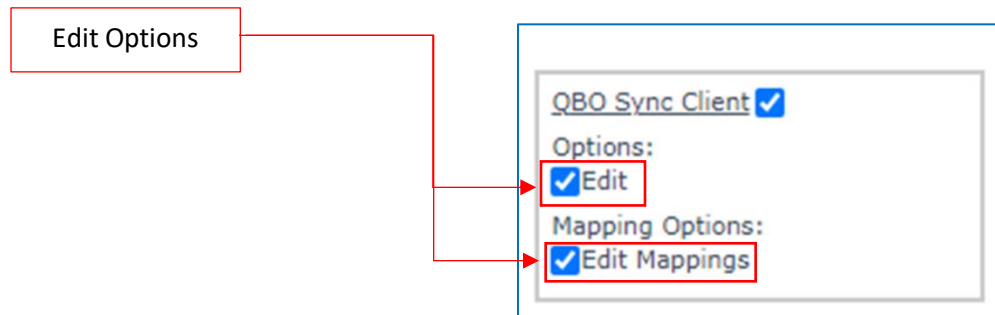


*QuickBooks
Online Sync
Client*

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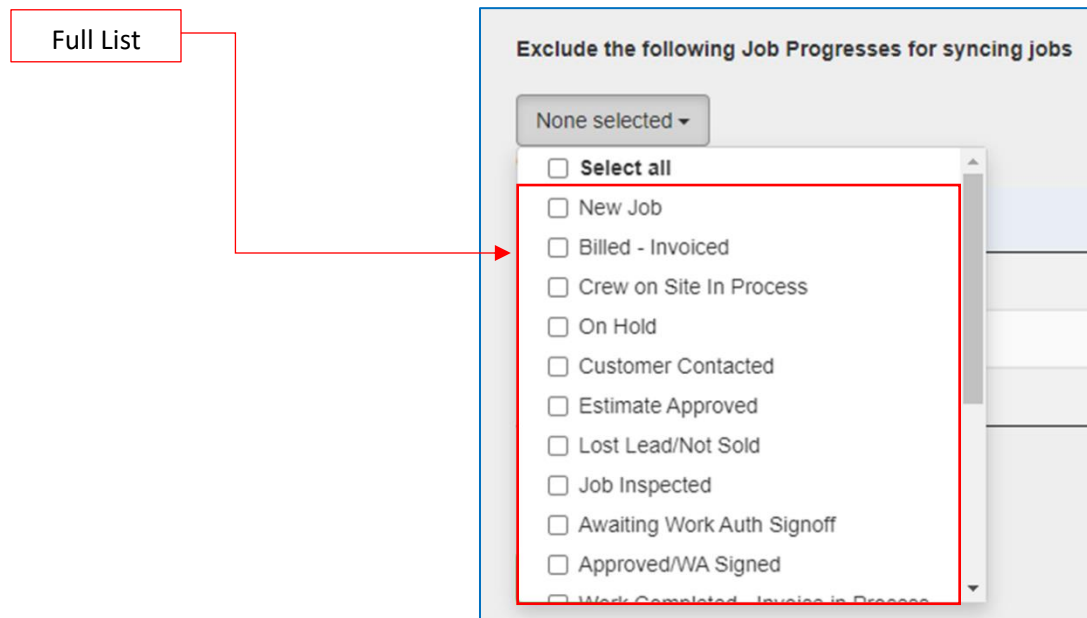
QuickBooks Online Sync Client Users can easily view data to be synced. Mapping for Loss Type with cost code has been added. The cost code can be mapped to multiple loss types as opposed to just one product. Administrators can edit the “Options” and “Mappings” sections while Users can only view.

New Restoration Manager Employee Permissions have been added to the employee permissions page for QuickBooks Online. This will be displayed for Restoration Manager only if QuickBooks Online Sync Integration is enabled. The edit option is available for the 2 sections.



The QuickBooks Online Options and Mapping Options are now editable but will appear as read-only if permissions are not set.

In the exclude Job progress section, jobs and purchase orders can be excluded based upon the selected job progress list. If exclude job progress is checked, the full list of job progresses from Restoration Manager will appear.



If “Send Jobs to QBO” is selected, the query for jobs excludes any jobs that have “exclude job progress” selected.

Select Jobs to Sync

Showing 1 to 10 of 219 entries

Synced with Accounting	Client	Job ID [Loss Type]	Address	Progress	RM Estimate Total
No	Farmer Joe	0318-0046 [Water]	6540 Shiloh Road, Alpharetta, GA 30005	Customer Contacted	0
No	Chipper Bell	0318-0047RT [Tree Removal]	6490 Ridgeview Drive, Morrison, CO 80465	Billed - Invoiced	0
No	Lola Blue	HP178016-JXBB [Water]	5342 South Jellison Street, Littleton, CO 80123	New Job	142797.06
No	Christieprj Bell	0418BRX0057 [XactAnalysis Loss]	7991 Shaffer Pkwy, Bldg buid1, Unit 300, Littleton, CO 80127	Job Inspected	0
No	Lisa Insurance Agent	BRX0088REC [Reconstruction]	3625 West Amherst Avenue, Denver, CO 80236	Final Billed - Collections	3600
No	Lisa Mulgster	BRX0094HOA [HOA - Property Management]	3333 South Wadsworth Boulevard, Bldg A, Lakewood, CO 80227	Job Completed	0
No	Tia J. Sharpe	BRX899002WT [Water]	6124 Ivy Rd Ivy Rd, Panama City, FL 32404	New Job	0
No	RMFloorone Address	BRX899006DW [Duct Work]	5877 S Taft Ln, Littleton, CO 80127	Customer Contacted	0
No	Lola Blue	0318-0048MLD [Mold]	7773 S Estes St, Littleton, CO 80128	New Job	0
No	Lisa Mulgster	BRX8990030 [Reconstruction]	4855 W Lakeridge Rd, Denver, CO 80219	New Job	0

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Select All Clear Selection

Select Jobs to Sync

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If “Send POs to QBO” is selected, the query for purchase orders will exclude any purchase orders where the job has the “excluded Job Progress” selected.

Select POs to Sync

Showing 1 to 10 of 50 entries

PO #	Job ID [Loss Type]	Status	In Quickbooks	Vendor	Amount
[Water] burst pipe 1	BRX0619-162WTR [Water]	Approved	Yes	Bell Vendor	\$2,234.00
2369-001 [Remodel] remodel the kitchen	[Carpentry]	Approved	No	Krnhop Framing and Flooring	\$13,500.00
BRX2003-001 [Board UP] Mike's test	1017-0029 [Abatement]	Approved	No	Bell Pump Co/	\$6,000.00
BRX2009-001 [Reconstruction] test	0318-0045 [Trim]	Approved	No	Bell Pump Co/	\$0.00
BRX2020-001 [Board UP] Clean the carpetand stairs	0418BRX0056WT [Carpet Cleaning]	Approved	No	Bell Pump Co/	\$2,591.00
BRX2027-001 [Tree Removal] Remove tree and stump.	0418BRX0064RT [Tree Removal]	Approved	No	Bell Pump Co/	\$0.00
BRX2046-001 [Tree Removal] Tree large - Crane RequiredRemove Trees - Cleanup	BRX0090 [Tree Removal]	Approved	No	A.J Concrete Pumping	\$1,000.00
BRX2058-001 [Duct Work] test	BRX8990008 [Abatement]	Approved	No	Bell Pump Co/	\$2,161.00
BRX2150-001 [Board UP] test	BRX0319-92BU [Abatement]	Approved	No	Bell Pump Co/	\$5,780.00
BRX2150-002 [Board UP] test test test	BRX0319-92BU [Reconstruction]	Approved	No	Bell Vendor	\$995.00

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Select POs to Sync

If cost code is selected, then "RM List Type" is included. QuickBooks Online Products and Services, "RM Loss Type", and "RM Cost Code" are mapping options for estimate by cost code.

If "Map Estimate by Cost Code" is selected in the Options, both the "RM List Type" and "RM Cost Code" will be used for estimate mappings.

The screenshot displays the 'Estimate Mappings' section of the software. At the top, there are tabs for 'Financial Mappings', 'Estimate Mappings', and 'PO Mappings'. Below these, there are three dropdown menus: 'QBO Products and Services' (set to 'Board Up'), 'RM Loss Type' (set to 'Duct Work'), and 'RM Cost Code' (set to 'None selected'). There are buttons for 'Select All', 'Clear Selection', 'Remove Mapping', 'Add Mapping', and 'Save'. A table below shows the mapping between 'QBO Products and Services', 'RM Loss Type', and 'RM Cost Code'. A red box highlights the 'RM Loss Type' column, and a red arrow points from a label 'RM Loss Type' above to this column.

QBO Products and Services	RM Loss Type	RM Cost Code
Hours	Remodel	ACT - ACOUSTICAL TREATMENTS
Hours	Remodel	AWN - AWNINGS & PATIO COVERS
Hours	Remodel	BGE - BUSINESS GOODS & EQUIPMENT
Hours	Remodel	CAB - CABINETS
Hours	Remodel	CAP - CONT. CLEAN APPLIANCES
Reconstruction	Fire	FCC - FLOOR COVERING - CARPET
Services	Services	FEE - PERMITS AND FEES
Services	Services	FRM - FRAMING & ROUGH CARPENTRY