

IMPLEMENTATION GUIDE

HOW DO YOU GET FROM YOUR OLD SYSTEM TO QFLOORS?



PURCHASE

1

Purchase QFloors

YOU GOT THIS!

We're here to assist you every step of the way.



PREPARE

2

Preparation: Choose a Go Live Date

(Live date should be 4-6 weeks from purchase)

We'll help you create a plan of action to implement the software.



BASIC SETUPS

3

Complete Basic Setups

(Within 5 - 10 business days from purchase)

Begin by completing our checklist of basic setups. We are here to help walk you through the checklist if you need assistance. Steps include setting up company information, locations, profit centers, sales tax, employees/subs, leads management, etc.



PRODUCT CATALOG

4

Enter Product Catalog

(Within 10 - 15 business days from purchase)

Setting up your product catalog will take about 5 to 8 hours. You can schedule a one-hour product catalog training if desired. From there, you'll receive instructions on how to enter product types, web services, account credentials, B2B products, retail price formulas, etc.



TRAINING

5

Software Training Appointments

(Within 15 - 20 business days from purchase)

After reviewing a few basic training videos, you can set up a 1-hour Basic Training for you and your team. Or, if needed, we can schedule multiple 1-hour appointments over a few weeks to accommodate your staff.



TRANSACTIONS & INVENTORY

6

Enter Carryover Transactions/Inventory

(Within 20 - 30 business days from purchase)

Enter existing inventory, create your in-process jobs in QFloors, input your previous system receivables, and enter your payables. Start on this no more than 4 days prior to going live.



GO LIVE

7

Go Live!

(Within 4 - 6 weeks from purchase)



ACCOUNTING BALANCES

8

Enter Accounting Balances From Previous System

(Complete a few weeks after going live)

Start this step after your go live date has passed, and as soon as balances in your previous accounting system are accurate, Enter your accounting balances using our "End of Period Procedures" checklist. Our support staff is also happy to assist you with this process.

**Note: If you are transitioning from a previous software system, you will need to work with your current software on how to export your data. Once the data has been extracted, we can show you how you will import your data into your QFloors Software. This can all be done once your basic setups are complete which should take you no more than a week.*