

# 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**

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



**BASIC SETUPS**

**3**

### **Complete Basic Setups**

Begin by completing our checklist of basic setups. We're 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, etc.



**PRODUCT CATALOG**

**4**

### **Enter Product Catalog**

Set up your product catalog with the products and services you sell most often. If you'd like additional assistance, you can schedule a complimentary one-hour product catalog training session with our team.



**TRAINING**

**5**

### **Software Training Appointments**

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



**TRANSACTIONS & INVENTORY**

**6**

### **Enter Carryover Transactions/Inventory**

Enter existing inventory, create your in-process jobs in QFloors, input your previous system receivables, and enter your payables.



**GO LIVE**

**7**

### **Go Live!**



**ACCOUNTING BALANCES**

**8**

### **Enter Accounting Balances From Previous System**

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.*