



Agenda and Overview of the OfficeTools QuickStart and Customization Appointment

This 3 hour session is designed specifically for new installations of OfficeTools, with the purpose of ensuring onboarding success and the establishment of best practices when implementing OfficeTools. Where purchased in a Service Order Form or Service Order Addendum, the Quickstart Configuration Service shall include deliverables described below, performance of which shall be governed by the Professional Services Terms & Conditions found at <https://www.abacusnext.com/ProServTerms>, which are herein incorporated by reference.

Program Details:

- **Hour 1**
 - **Discuss contact data import**
 - We typically import from 1 or more sources; Lacerte (1st), QuickBooks (2nd), and Excel (3rd). If you are not syncing with Lacerte or QuickBooks for your client data, it is highly recommended that you have your data exported prior to this appointment. Your trainer will not typically be able to help you export from your existing software.
 - **If possible, we will execute the data import.**
 - If this is not able to be performed, we will need to reschedule a follow up to perform the import. This is typically due to the need to clean up the data by the user and requires a bit more time. (removing duplicates, naming conventions etc)
 - **Connect Integration Tools**
 - Lacerte, QuickBooks, and Outlook. This is not a detailed training on using the syncs, just the technical connecting of them for future training courses.
 - **Discuss Document Management Options**
 - Uncover desired need for Document Management and formulate a plan to address existing document structures. (Similarly, to contact data, if your documents exist in another program, you will be responsible for exporting them from that program).
 - Set the OfficeTools Document path (user defined location).
 - **Address Time/Billing Balances**
 - Beginning WIP balances
 - Beginning A/R balances
 - Necessity of a cutoff date for billing needs
- **Hour 2**
 - **Outline Workflow Process**
 - This will be a simple walkthrough (demo) of how the projects are setup out of the box, to make sure you have a fresh understanding to make setup decisions. In-depth questions will be answered in the Projects: Workflow and Due Date Tracking training that can be scheduled after the completion of this course.
 - **Define Project Definitions**
 - We will go through existing OfficeTools templates and show you how to add/edit & delete project templates.
 - **Define Project Assignment Groups**
 - We will explain and discuss workflow steps or the tasks that need to be completed for each project to be completed.

- **Hour 3**

- **Outline Basic Billing Process**
 - To set the foundation on how time entry connects to invoicing. In- depth questions will be answered in the Time and Billing training at a later time.
- **Define Work Codes**
 - These are your time codes. Billable, Non-Billable, and PTO. These cannot be imported from other billing systems, so it is recommended you have them available prior to this course.
- **Define Billing Rates**
- **Define Staff Cost Rates**
- **Discuss Letterhead Options**
 - Your company graphic for your invoices and statements
- **Discuss APX options and how to apply**
 - Setup/Configure APX (Abacus Payment Exchange) if subscribed.

Typically, at the end of this course our trainer will have a detailed understanding of your office, training needs and will recommend specific training courses to further continue your OfficeTools education.

Any additional questions can be sent to:

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