



Vantagepoint

Quickbooks Online Integration

Keep your existing general ledger and gain game-changing professional services automation

Pursue, win, and deliver projects while increasing productivity, collaboration, and profitability with Vantagepoint. Build pipeline, plan and deliver successful projects, and easily create accurate invoices with one integrated solution. This PSA (Professional Services Automation) solution allows you to keep Quickbooks Online while connecting your business development, project management and resource management activities.

| Feature | Front Office Suite |
|--|--------------------|
| Time & Expense | ● |
| Billing | ● |
| Project Accounting | ● |
| Project Management | ● |
| Collaboration | ● |
| Resource Management | ● |
| CRM | ● |
| Complete Financial Management & Accounting | |

Time & Expense: Quickly and easily capture billable and non-billable time and expenses against projects or individual tasks.

Billing: Easily create and submit invoices for a variety of projects; including fixed fee, time and materials, expenses, and more.

Project Accounting: Prevent budget overruns with a solution built to give you complete visibility into your project financials. Calculate project budgets, monitor status, and measure performance during project delivery.

Project Management: Vantagepoint provides visibility into every aspect of your projects in one hub from initial pursuit through completion for successful delivery and increased client satisfaction.

Collaboration: Notify team members of new assignments to keep everyone on task. Collaborate with comments and conversations to update the team throughout the project.

CRM: Identify leads earlier and easily create new contacts, manage client relationships, track activities, build your pipeline, and create impressive proposals.

Resource Management: Build teams by searching for skills, expertise and capacity. Secure resources from the start to ensure successful projects and engagements and then notify employees of assignments to keep teams on track.

Appendix 1:

How Does It Work? The Vantagepoint integration with Quickbooks Online is a powerful bridge between your existing accounting system and a full Enterprise Resource Planning solution. You gain all the features of a complete PSA solution without disrupting your current accounting processes. When you are ready, you can add complete financial management and accounting to your existing instance of Vantagepoint for an even more powerful end-to-end solution.

Mapped Transactions:

| Transactions Entered in Vantagepoint: | Result in QuickBooks Online: |
|--|--|
| Enter, approve (optional), and post timesheets | Timesheet hours are added for processing payroll |
| Enter, approve (optional), and post employee expense reports | Expense reports are added as vendor payables |
| Enter and post billing invoices | Billing invoices are added |
| Enter and post accounts payable (AP) vouchers | AP vouchers are added |
| Enter and post journal entries | Journal entries are added |
| Run revenue recognition | Journal entries are added |

| Transactions Entered In QuickBooks Online: | Result in Vantagepoint: |
|---|------------------------------------|
| Pay the vendor bills for employee expense reports from Vantagepoint | Expense report payments are added |
| Enter payments received from customers for billing invoices | Billing invoice payments are added |
| Pay the vendor bills for accounts payable (AP) vouchers from Vantagepoint | AP payments are added |