Construction PM + Accounting Integration
Readiness Checklist

Is your team ready to integrate your project management and accounting software?

Use this checklist to evaluate whether now is the right time—or if it's better to hold off and prepare.

Team & Workflow Readiness

- ☐ We have clearly defined workflows for estimating, scheduling, and billing.
- ☐ Our team understands the importance of accurate job costing.
- ☐ We have internal alignment between project managers and accounting staff.
- ☐ Staff are open to learning and adapting to new software tools.

Software & Systems Readiness

- ☐ We are currently using (or plan to use) QuickBooks Online or QuickBooks Desktop.
- ☐ Our ConstructionOnline project data is up-to-date and organized.
- ☐ Our QuickBooks chart of accounts, client records, and job names are standardized.
- ☐ We've reviewed naming conventions and cost codes across both systems.

Data Health & Organization

- ☐ Duplicate or outdated records have been cleaned up.
- ☐ We have a consistent structure for project phases and cost categories.
- ☐ We're prepared to map data between ConstructionOnline and QuickBooks.

Security & Permissions

- ☐ We've identified who should have access to financial data.
- ☐ We understand how to manage user roles and sync approvals.
- ☐ We've considered safeguards for preventing unwanted data syncs.

Timing & Prioritization

☐ We're not in the middle of another major rollout or transition.

☐ We have the time and resources to onboard our team properly.

☐ We understand integration isn't urgent, but it will support future growth.

If you checked most of these boxes...

You're likely ready to start integrating your systems. Explore how **ConstructionOnline's award-winning QuickBooks integration** can connect your project operations with financial reporting—smoothly and securely.

If you left a few boxes unchecked...

That's okay! Use this checklist to guide your preparation. When your systems and workflows are ready, integration will deliver even greater value. In the meantime, explore tools in ConstructionOnline that can support better data organization and collaboration across teams.