

## Phase 1

- Establishing Company Settings \*
- Importing Users \*
- Quickbooks Integration \*
- Options
- Service Items
- Service Forms

## Phase 2

- Import + Export Objects
- Staff Login
- Recurring Service Requests
- Merged Invoicing
- Portal Pages

## Phase 3

- Implementing Workflows
- Merchant Services
- Feedback
- HELP (Resource Center)
- Review Day In The Life

## Phase 4

- Test with Real Work Orders
- Exporting Invoices to QuickBooks
- Advanced Reporting

