Project Tracking Setup Checklist Updated 03/28/2022

Please review the training links below for Project Tracking

Resources	Links
Construction Landing Page	Knowledge Base
Budgets Vs Actuals Learning Path	Academy
Progress Billing with Application for Payment	Academy
Project Tracking Overview with Product Manager	Zoom Link Password: 0#58%sj7

Complete	Project Tracking
☐	**Sign up for the live Project Tracking Trainings (REQUIRED)** See training links for which users should be attending each workshop. ☐ Project Tracking Setup (#1) ☐ Project Tracking Workflows (#2)
☐	**Settings > Project Settings:** ☐ **Create Project Labels** (drag and drop to be in preferred order) KB Article ☐ **Default Preferences**: Set a default label for the different types. (Note if the PB item has a label already, then the labels used as default will not be added). ☐ **Project Setup**: *Percentage of Completion Method* should most likely be the default. Most companies using this feature will use this one, and if you want to use the Work In Progress report this is the one that works with that. ☐ **Retainage:** (*Optional for those that use it*) KB Article Create a project label for retainage that will help with reporting later.
☐	**Pricebook Setup**: (Recommendations) KB Article ☐ Service created for customer billing ☐ Service created for each type of labor offered ☐ Average cost for labor included in Estimated Labor Cost field ☐ Apply labor labels to each type of labor (Default added via project setting > default preference) ☐ Apply material labels to each material that will be used in projects (Default added via project setting > default preference) ☐ Apply equipment labels to each equipment that will be used in projects (Default added via project setting > default preference)

☐	**Settings Setup:**
	☐ Separate business unit(s) set up for construction (Or commercial etc) KB Article
	☐ Separate trade(s)/division(s) set up for construction (Or commercial etc)
	☐ **Settings >Technicians:**
	    ☐ Hourly pay rates added
	    ☐ Burden Rates added KB Article
	    ☐ Project Labels applied based on the type of labor performed
	    (this is for the timesheets to have labels for the actuals on budget vs actual tables).
	☐ Job types set up for each project phase (Highly recommended)
	☐ **Settings > Project Statuses** KB Article Default statuses but can customize sub-statuses
	☐ Project labels assigned to each job type (Optional but highly recommended)
	☐ **Settings > (Invoicing) Email > Application for Paymen**t tab. (Used if emailing to customer)
	☐ **Settings > Application For Payment**- can set up retainage code KB Article

☐	☐ **Work In Progress Report:** KB Article Once it's in your account, it will show as a new dataset in custom reporting.