



FOR IMMEDIATE RELEASE

ForgeOne™ CRM Launches QuickBooks® Online Integration To Eliminate Double Entry For Contractors

Contractors can now send customer and invoice information from the ForgeOne™ CRM job straight into QuickBooks Online.

FORT WORTH, Texas — October 16, 2026 — ForgeOne™ CRM, the contractor management platform built by a contractor for contractors, today announced the availability of its QuickBooks Online integration. The connection lets roofing and exterior contractors move supported customer and invoice records from a ForgeOne™ CRM job into their QuickBooks Online company without retyping the same information. For most contractors, the job lives in one system and the books live in another. Office staff rebuild customers and invoices by hand, which costs time and invites errors. The ForgeOne™ CRM integration closes that gap by keeping the job as the starting point for billing.

With the integration, contractors can:

- Securely authorize their existing QuickBooks Online company through Intuit from ForgeOne™ CRM settings
- Use the customer already attached to the job instead of creating a duplicate accounting record
- Build and review the invoice on the job, then send supported invoice information to QuickBooks Online
- Keep billing status visible to the office without switching between apps

“Every contractor I know has typed the same invoice twice — once for the customer and once for the books,” said James McGaugh, Founder & Owner of ForgeOne™ CRM. “This integration lets the office finish the job in ForgeOne™ CRM and have the accounting record ready in QuickBooks Online.”

The QuickBooks Online integration is available now to ForgeOne™ CRM customers. A company admin can connect it from the Integrations tab in settings. Details are at integrations.forgeonecrm.com/quickbooks-online.

ABOUT QUICKBOOKS ONLINE

QuickBooks Online is cloud-based accounting software from Intuit Inc. that small businesses use to manage invoicing, expenses, payments and financial reporting.

ABOUT FORGEONE™ CRM

ForgeOne™ CRM is a Fort Worth, Texas–based contractor management platform built from years of hands-on contractor and insurance workflow experience. ForgeOne™ CRM connects supplier ordering, measurements, estimating, financing, payments, file storage and accounting to a single job record so teams stop rebuilding the same work in multiple systems. ForgeOne™ CRM is available on the web, the Apple App Store and Google Play. Learn more at forgeonecrm.com.

MEDIA CONTACT

James McGaugh, Founder & Owner
ForgeOne™ CRM
support@forgeonecrm.com
(844) 933-1276

Intuit and QuickBooks are trademarks and/or registered trademarks of Intuit Inc. All other trademarks are the property of their respective owners. ForgeOne™ CRM is not affiliated with or endorsed by Intuit Inc.

###



FOR IMMEDIATE RELEASE

ForgeOne™ CRM Adds Google Drive™ Backup So Contractors Keep Control Of Their Job Files

Photos, documents and reports from ForgeOne™ CRM can now back up to the contractor company's own Google Drive.

FORT WORTH, Texas — October 16, 2026 — ForgeOne™ CRM, the contractor management platform built by a contractor for contractors, today announced a Google Drive integration that backs up ForgeOne™ CRM files to the contractor company's own Google Drive account.

A single roofing job can produce hundreds of photos plus measurement reports, estimates, signed contracts and insurance paperwork. Contractors want those records stored where their business already keeps files, under their own account. The new integration does that without manual downloads and uploads.

With the integration, contractors can:

- Connect the company's Google Drive from ForgeOne™ CRM settings in a few steps
- Back up ForgeOne™ CRM job files to Drive automatically
- Keep ownership of the Drive connection with the contractor company, not an individual user
- Give the office a second, familiar place to find job records

"Your job files are your business records, and you should own where they live," said James McGaugh, Founder & Owner of ForgeOne™ CRM. "Connecting Google Drive gives contractors a backup they control, in a tool their office already uses every day."

The Google Drive integration is available now to ForgeOne™ CRM customers from the Integrations tab in settings. Learn more at integrations.forgeonecrm.com.

ABOUT GOOGLE DRIVE

Google Drive is Google's cloud file storage and sharing service and part of Google Workspace, used by individuals and businesses to store, access and share files from any device.

ABOUT FORGEONE™ CRM

ForgeOne™ CRM is a Fort Worth, Texas-based contractor management platform built from years of hands-on contractor and insurance workflow experience. ForgeOne™ CRM connects supplier ordering, measurements, estimating, financing, payments, file storage and accounting to a single job record so teams stop rebuilding the same work in multiple systems. ForgeOne™ CRM is available on the web, the Apple App Store and Google Play. Learn more at forgeonecrm.com.

MEDIA CONTACT

James McGaugh, Founder & Owner
ForgeOne™ CRM
support@forgeonecrm.com
(844) 933-1276

Google Drive and Google Workspace are trademarks of Google LLC. All other trademarks are the property of their respective owners.
ForgeOne™ CRM is not affiliated with or endorsed by Google LLC.

###



FOR IMMEDIATE RELEASE

ForgeOne™ CRM Launches Dropbox Integration For Contractor File Backup

Contractors can back up ForgeOne™ CRM job files to their company Dropbox while keeping unrelated files out of the connection.

FORT WORTH, Texas — October 16, 2026 — ForgeOne™ CRM, the contractor management platform built by a contractor for contractors, today announced a Dropbox integration that backs up ForgeOne™ CRM files to the contractor company's Dropbox account. Many contracting companies already run their office files through Dropbox. The integration lets them add ForgeOne™ CRM job records to that same storage without giving ForgeOne™ CRM access to everything else in the account. ForgeOne™ CRM files stay organized in their own space, and unrelated Dropbox files stay outside the connection.

With the integration, contractors can:

- Connect the company's Dropbox from ForgeOne™ CRM settings
- Back up job photos, measurement reports, estimates and documents
- Keep unrelated Dropbox content separate from ForgeOne™ CRM
- Keep company ownership of the storage connection

“Contractors told us they wanted their ForgeOne™ CRM files backed up where the rest of their business already lives,” said James McGaugh, Founder & Owner of ForgeOne™ CRM. “For a lot of shops, that’s Dropbox. Now it’s one connection and done.”

The Dropbox integration is available now in the ForgeOne™ CRM web app from the Integrations tab in settings. Support in the ForgeOne™ CRM iOS app is planned. Learn more at integrations.forgeonecrm.com.

ABOUT DROPBOX

Dropbox, Inc. provides cloud storage, file sharing and collaboration tools used by individuals and businesses around the world to keep files secure and accessible from any device.

ABOUT FORGEONE™ CRM

ForgeOne™ CRM is a Fort Worth, Texas-based contractor management platform built from years of hands-on contractor and insurance workflow experience. ForgeOne™ CRM connects supplier ordering, measurements, estimating, financing, payments, file storage and accounting to a single job record so teams stop rebuilding the same work in multiple systems. ForgeOne™ CRM is available on the web, the Apple App Store and Google Play. Learn more at forgeonecrm.com.

MEDIA CONTACT

James McGaugh, Founder & Owner
ForgeOne™ CRM
support@forgeonecrm.com
(844) 933-1276

Dropbox is a trademark of Dropbox, Inc. All other trademarks are the property of their respective owners. ForgeOne™ CRM is not affiliated with or endorsed by Dropbox, Inc.

###



FOR IMMEDIATE RELEASE

ForgeOne™ CRM Integrates Acorn Finance To Put Customer Financing In Front Of Homeowners At Decision Time

Contractors can show their Acorn Finance option on estimates, invoices and the ForgeOne™ CRM customer portal.

FORT WORTH, Texas — October 16, 2026 — ForgeOne™ CRM, the contractor management platform, today announced an Acorn Finance integration that places a contractor's Acorn Finance option directly on the customer-facing screens of ForgeOne™ CRM.

A new roof is one of the largest expenses a homeowner faces, and the financing conversation often happens after the estimate is already sent or not at all. With the integration, homeowners see the contractor's financing option while they are reviewing the price.

With the integration, contractors can:

- Save their company's customer-facing Acorn Finance link in ForgeOne™ CRM
- Show the financing option on estimates, alongside invoices, in the customer portal
- Control exactly which customer screens display financing

For homeowners, that means:

- Checking pre-qualified offers with no impact to their credit score
- Loan amounts from \$1,000 to \$100,000, with terms from 2 to 20 years
- Funding in as soon as 24 hours once approved*

"The best time to talk about financing is when the homeowner is looking at the number," said James McGaugh, Founder & Owner of ForgeOne™ CRM. "Now the option is right there on the estimate instead of buried in a follow-up email."

The Acorn Finance integration is available now to ForgeOne™ CRM customers. Contractors complete onboarding with Acorn Finance, then add their link in ForgeOne™ CRM settings. Details are at integrations.forgeonecrm.com/acorn-finance.

Homeowners can check their pre-qualified offers at acornfinance.com/pre-qualify.

ABOUT ACORN FINANCE

Acorn Finance partners with a network of lenders to bring homeowners flexible, fully online financing for their projects. Customers can check pre-qualified personal loan offers with no impact to their credit score, with loan amounts from \$1,000 to \$100,000 and terms from 2 to 20 years.

ABOUT FORGEONE™ CRM

ForgeOne™ CRM is a Fort Worth, Texas-based contractor management platform built from years of hands-on contractor and insurance workflow experience. ForgeOne™ CRM connects supplier ordering, measurements, estimating, financing, payments, file storage and accounting to a single job record so teams stop rebuilding the same work in multiple systems. ForgeOne™ CRM is available on the web, the Apple App Store and Google Play. Learn more at forgeonecrm.com.

MEDIA CONTACT

James McGaugh, Founder & Owner
ForgeOne™ CRM
support@forgeonecrm.com
(844) 933-1276

Acorn Finance is a trademark of its respective owner. All other trademarks are the property of their respective owners. *Financing is provided by third-party lenders through Acorn Finance; ForgeOne™ CRM is not a lender and does not make credit decisions. All loans and other financial products are subject to credit review and approval by Acorn Finance's partners. If approved, funding times may vary.

Pre-qualification uses a soft credit pull that does not impact credit scores; funding partners will conduct a hard credit pull when a customer expresses interest in an offer, which could impact their credit score.

###