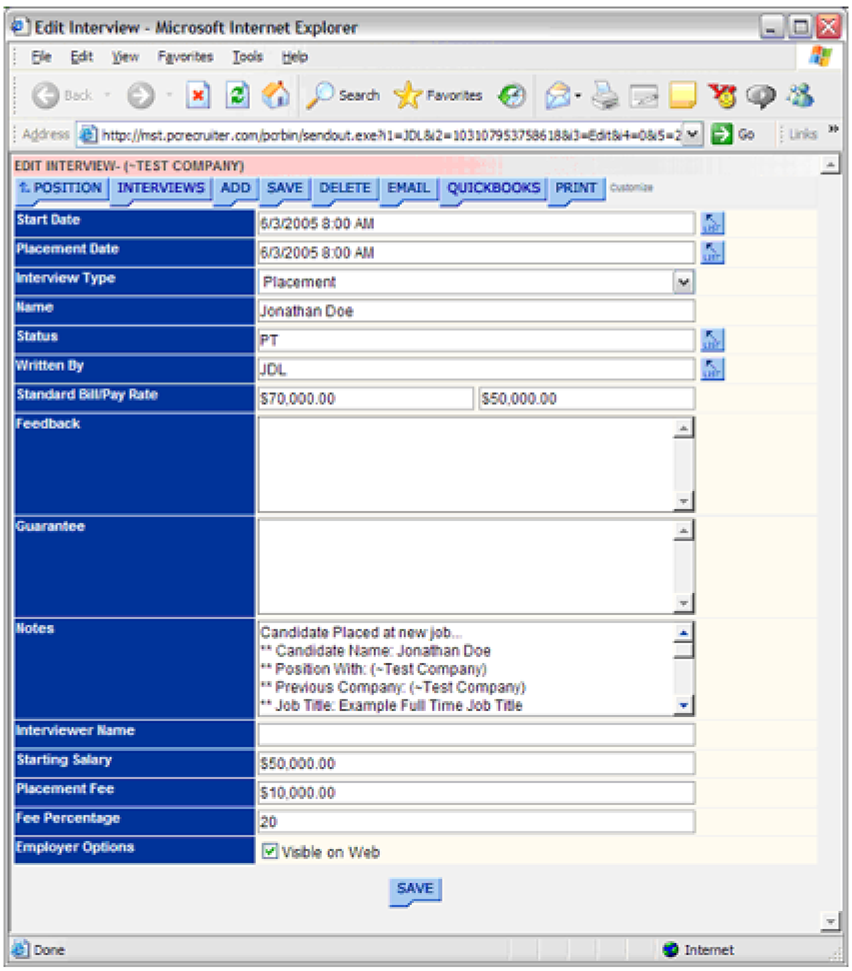
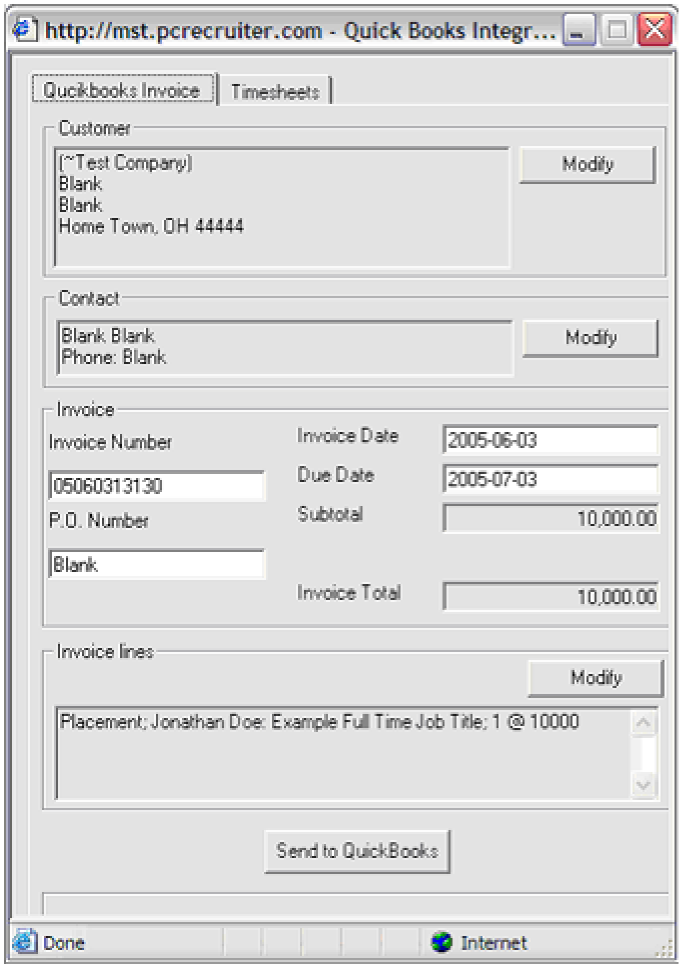
Using QuickBooks with PCRecruiter

Permanent Placements:

When a permanent placement is made in PCRecruiter, the data can be transferred to QuickBooks by selecting the placement record, and clicking on the ‘QUICKBOOKS’ button at the top of the form.

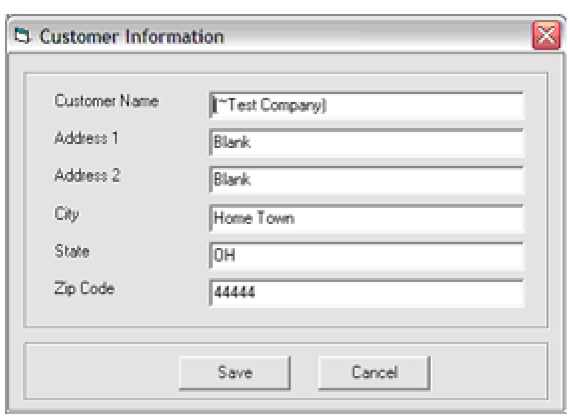


A new window will appear containing the data that will be transferred. The screenshot below is a sample:



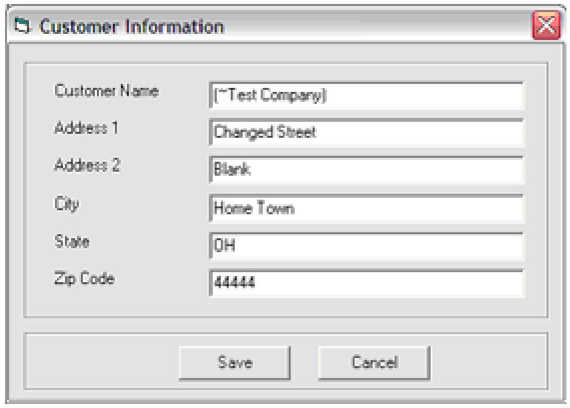
There are two tabs. The first, 'QuickBooks Invoice' is used for permanent placements.
The second tab, 'Timesheets' is only used for temporary placements.

There are three modifiable regions on this form. One to deal with company information, another to deal with contact information, and the last one allows the user to edit the line-item detail that will be sent to QuickBooks. To edit the company information, click on the 'Modify' button to the right of the 'Customer' cell. The following screen will be presented:

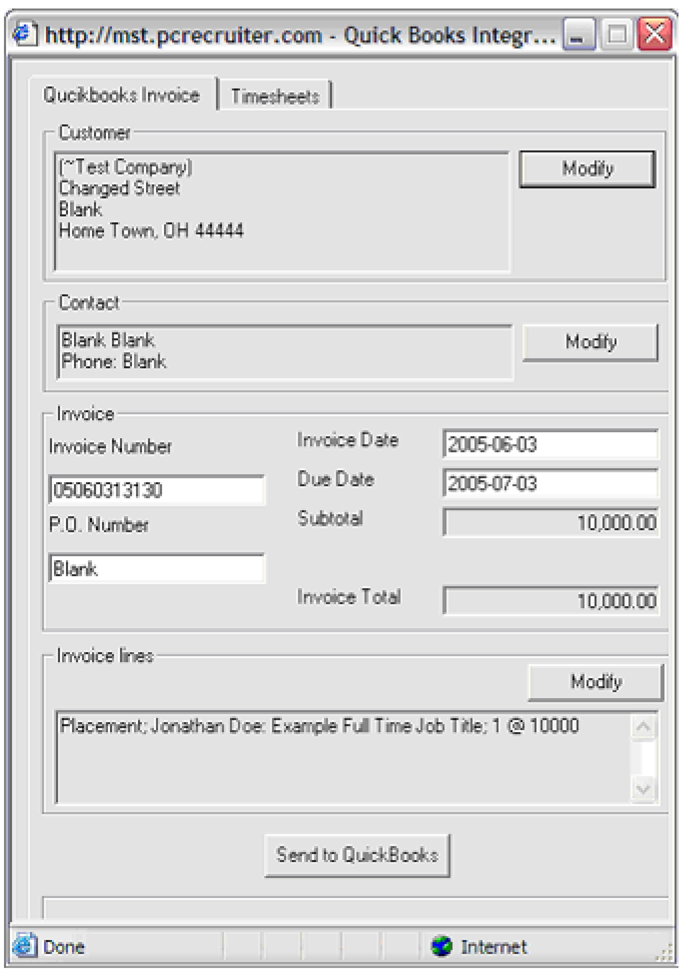


The displayed field values can be modified here. After editing, click ‘Save’ to update the main QuickBooks Integration form. Click cancel to return to the main screen without saving the changes.

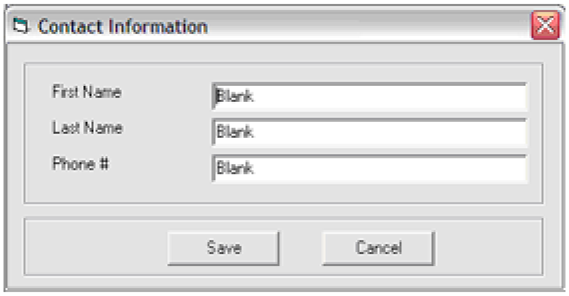
The screen below displays modified values:



After clicking ‘Save’, the Customer Information window closes, and the main screen is updated to reflect the editing:

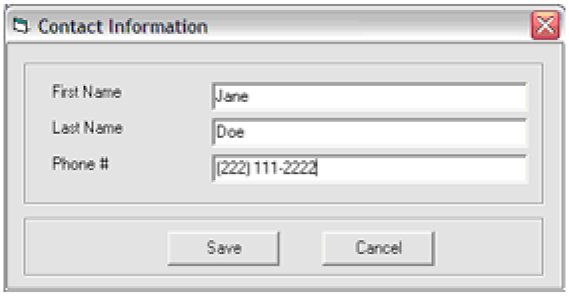


To edit the contact information, click on the ‘Modify’ to the right of the ‘Contact’ cell. The following screen will be presented:

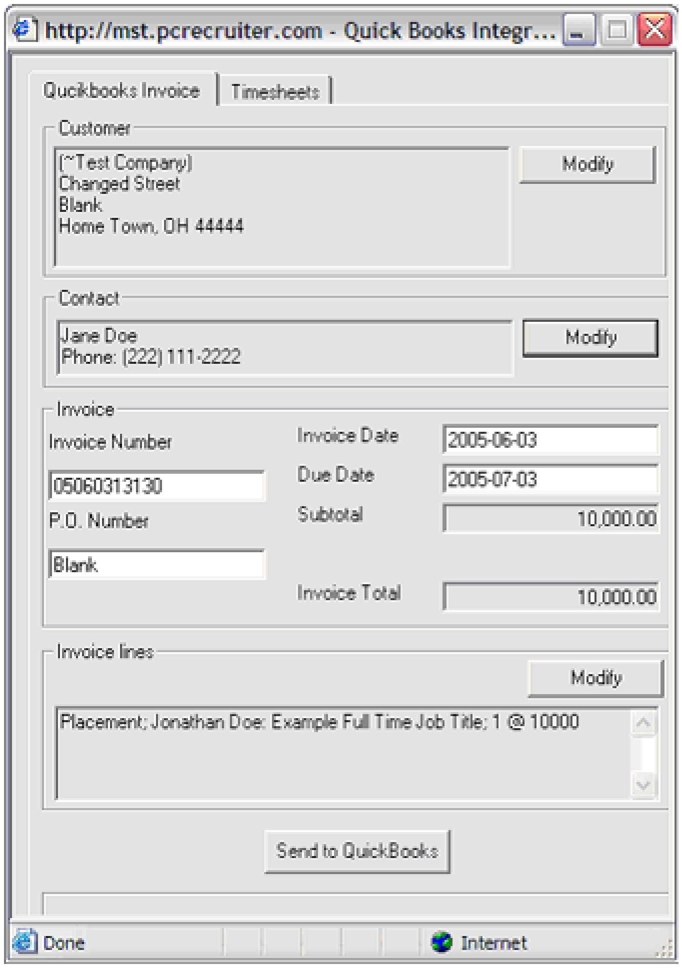


The displayed field values can be modified here. After editing, click ‘Save’ to update the main QuickBooks Integration form. Click cancel to return to the main screen without saving the changes.

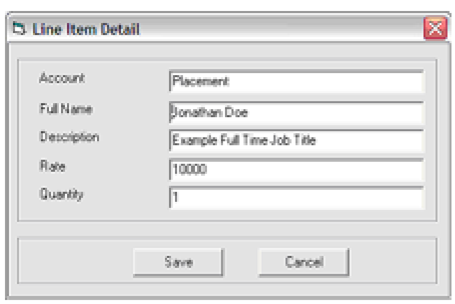
The screen below displays modified values:



After clicking 'Save', the Contact Information window closes and the screen reflects the change:

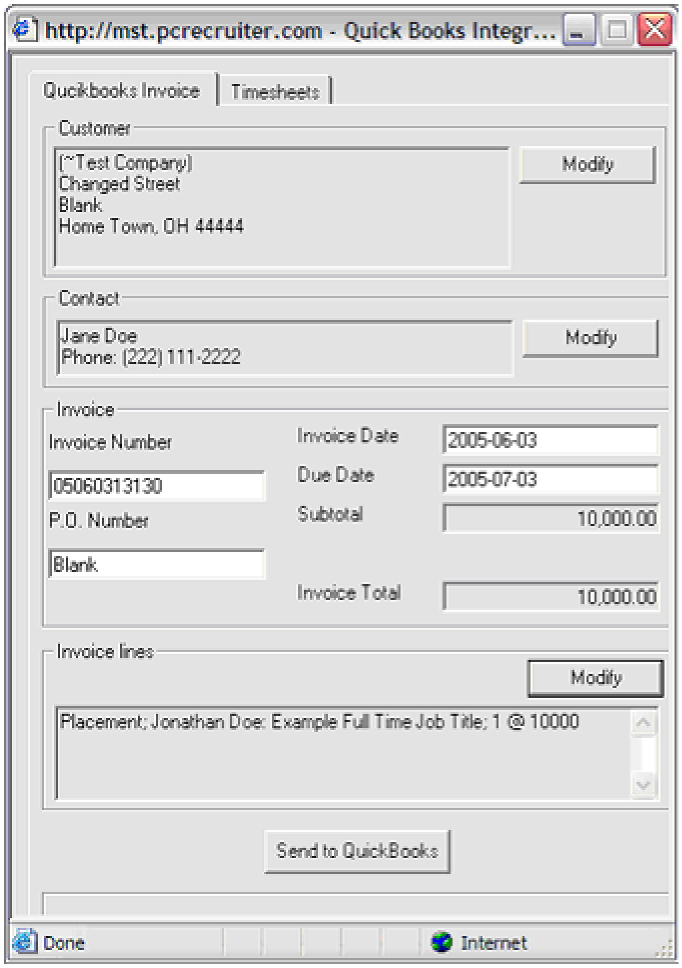


To edit the line item information, click on the 'Modify' to the right of the 'Invoice lines' cell. The following screen will be presented:



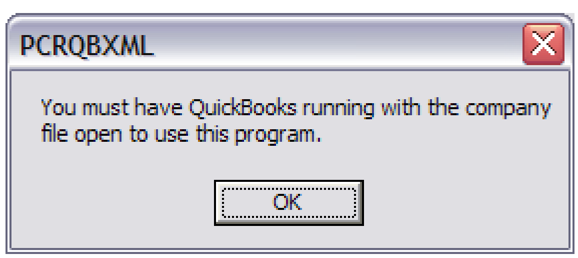
The displayed field values can be modified here. After editing, click 'Save' to update the main QuickBooks Integration form. Click 'Cancel' to return to the main screen without saving the changes.

After clicking ‘Save’, the Line Item Detail window closes, and the main screen is updated to reflect the editing:



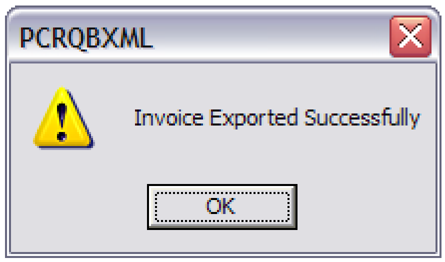
After all desired editing has been accomplished, simply click the ‘Send to QuickBooks’ button to transfer the data to QuickBooks.

In order for the data to be successfully transferred, either QuickBooks, or the ‘Remote Data Sharing Client’ must be running locally. If the neither of these applications is running, the following message will be displayed:



If QuickBooks is running, and you receive back a message similar to the one below, carefully read the message.

The most common error is that the company does not exist in QuickBooks. To remedy this issue, enter the company record in QuickBooks, and click the ‘Send to QuickBooks’ button again. If you see the following message, your data has been successfully transferred.



Click the ‘OK’ button to close the dialog box. You may then close the main QuickBooks Integration screen by clicking the red ‘X’ in the upper-right corner.

PCRecruiter's QuickBooks Integration

Here is a listing of the QuickBooks XML fields. All fields are carried over for both Permanent and Contract. The only exception is the Invoice section which is for Perm placement only...

Company
Company Name

Employee
FirstName
MiddleName
LastName
EmployeeAddress
City
State
PostalCode
SSN
EmployeeType

PayrollItem
Name
IsActive
WageType
ExpenseAccountRef

ServiceItem
Name
IsActive
SalesOrPurchase
Price

Timesheet
TxnDate
ListID
CustomerRef
FullName
ItemServiceRef
Rate
Duration
Notes
IsBillable

Invoice
CustomerRef
RefNumber
BillAddress
 Addr1
 Addr2
 Addr3
 City
 State
 PostalCode
PONumber
ItemRef
Desc
Quantity
Rate