



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.

The screenshot shows a web browser window titled "Edit Interview - Microsoft Internet Explorer". The address bar shows a URL from "mst.pcrecruiter.com". The main content area is a form titled "EDIT INTERVIEW - (~TEST COMPANY)". The form has a navigation bar with buttons: POSITION, INTERVIEWS, ADD, SAVE, DELETE, EMAIL, QUICKBOOKS, and PRINT. The "QUICKBOOKS" button is highlighted. Below the navigation bar, the form contains several fields:

Start Date	6/3/2005 8:00 AM
Placement Date	6/3/2005 8:00 AM
Interview Type	Placement
Name	Jonathan Doe
Status	PT
Written By	JDL
Standard Bill/Pay Rate	\$70,000.00
Feedback	
Guarantee	
Notes	Candidate Placed at new job... ** Candidate Name: Jonathan Doe ** Position With: (~Test Company) ** Previous Company: (~Test Company) ** Job Title: Example Full Time Job Title
Interviewer Name	
Starting Salary	\$50,000.00
Placement Fee	\$10,000.00
Fee Percentage	20
Employer Options	<input checked="" type="checkbox"/> Visible on Web

At the bottom of the form, there is a "SAVE" button.

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

http://mst.pcrecruiter.com - Quick Books Integr...

QuickBooks Invoice | Timesheets

Customer

[~Test Company] [Modify]
Blank
Blank
Home Town, OH 44444

Contact

Blank Blank [Modify]
Phone: Blank

Invoice

Invoice Number	Invoice Date	2005-06-03
05060313130	Due Date	2005-07-03
P.O. Number	Subtotal	10,000.00
Blank	Invoice Total	10,000.00

Invoice lines

[Modify]

Placement; Jonathan Doe: Example Full Time Job Title; 1 @ 10000

[Send to QuickBooks]

Done Internet

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:

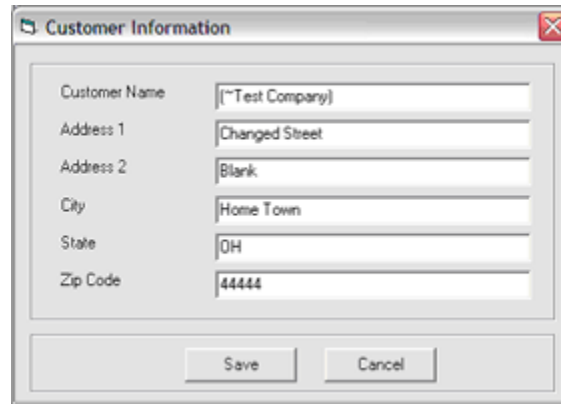
Customer Information

Customer Name [~Test Company]
Address 1 Blank
Address 2 Blank
City Home Town
State OH
Zip Code 44444

[Save] [Cancel]

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:

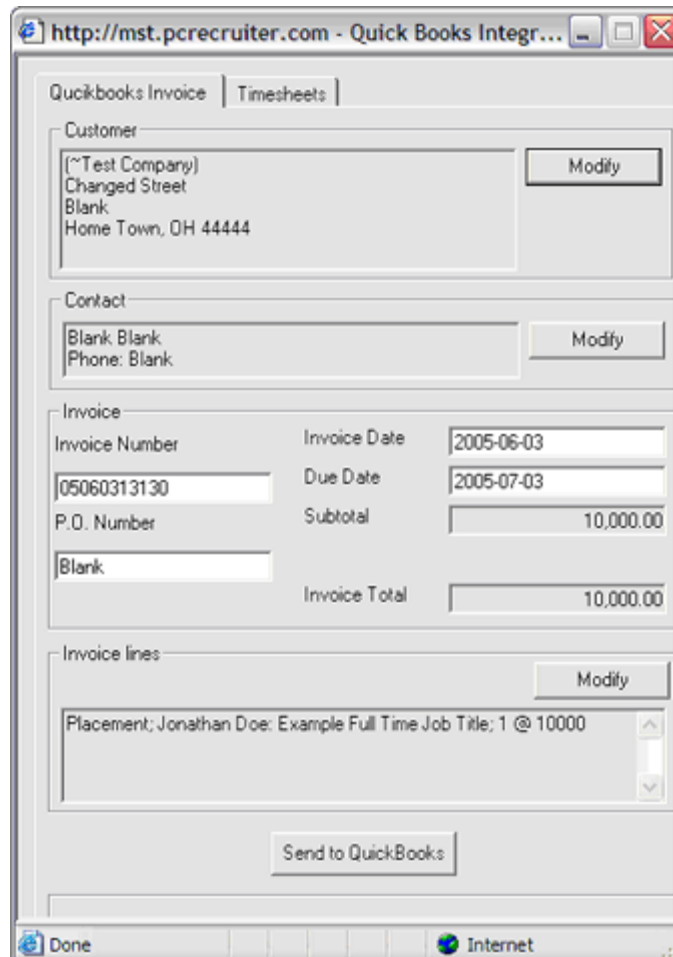


A dialog box titled "Customer Information" with a close button (X) in the top right corner. It contains several text input fields with the following values:

Customer Name	[~Test Company]
Address 1	Changed Street
Address 2	Blank
City	Home Town
State	OH
Zip Code	44444

At the bottom of the dialog box are two buttons: "Save" and "Cancel".

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



The main screen of the QuickBooks Integration application, titled "http://mst.pcrecruiter.com - Quick Books Integr...". It features two tabs: "Quickbooks Invoice" (selected) and "Timesheets".

The "Customer" section displays the following information:

- Customer Name: [~Test Company]
- Address 1: Changed Street
- Address 2: Blank
- City: Home Town, OH 44444

A "Modify" button is located to the right of the customer information.

The "Contact" section displays the following information:

- Contact Name: Blank Blank
- Phone: Blank

A "Modify" button is located to the right of the contact information.

The "Invoice" section displays the following information:

Invoice Number	Invoice Date	2005-06-03
05060313130	Due Date	2005-07-03
P.O. Number	Subtotal	10,000.00
Blank	Invoice Total	10,000.00

The "Invoice lines" section displays the following information:

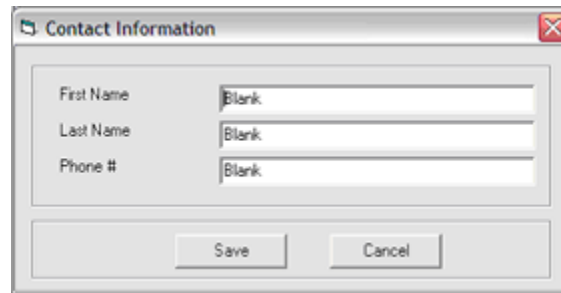
- Invoice Line: Placement; Jonathan Doe: Example Full Time Job Title: 1 @ 10000

A "Modify" button is located to the right of the invoice line information.

A "Send to QuickBooks" button is located at the bottom of the screen.

The status bar at the bottom shows "Done" and "Internet".

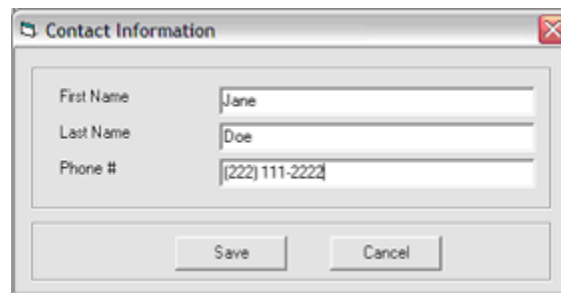
To edit the contact information, click on the 'Modify' to the right of the 'Contact' cell. The following screen will be presented:



A dialog box titled "Contact Information" with a close button in the top right corner. It contains three text input fields: "First Name" with the value "Blank", "Last Name" with the value "Blank", and "Phone #" with the value "Blank". At the bottom, there are two buttons: "Save" and "Cancel".

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:



A dialog box titled "Contact Information" with a close button in the top right corner. It contains three text input fields: "First Name" with the value "Jane", "Last Name" with the value "Doe", and "Phone #" with the value "(222) 111-2222". At the bottom, there are two buttons: "Save" and "Cancel".

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

The screenshot shows a web browser window titled "http://mst.pcrecruiter.com - Quick Books Integr...". The main content area is divided into several sections:

- Customer:** A text box containing "[~ Test Company], Changed Street, Blank, Home Town, OH 44444" with a "Modify" button to its right.
- Contact:** A text box containing "Jane Doe, Phone: (222) 111-2222" with a "Modify" button to its right.
- Invoice:** A table-like form with the following fields:

Invoice Number	Invoice Date	2005-06-03
05060313130	Due Date	2005-07-03
P.O. Number	Subtotal	10,000.00
Blank	Invoice Total	10,000.00
- Invoice lines:** A text box containing "Placement; Jonathan Doe: Example Full Time Job Title; 1 @ 10000" with a "Modify" button to its right.

At the bottom of the form is a "Send to QuickBooks" button. The browser's status bar shows "Done" and "Internet".

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

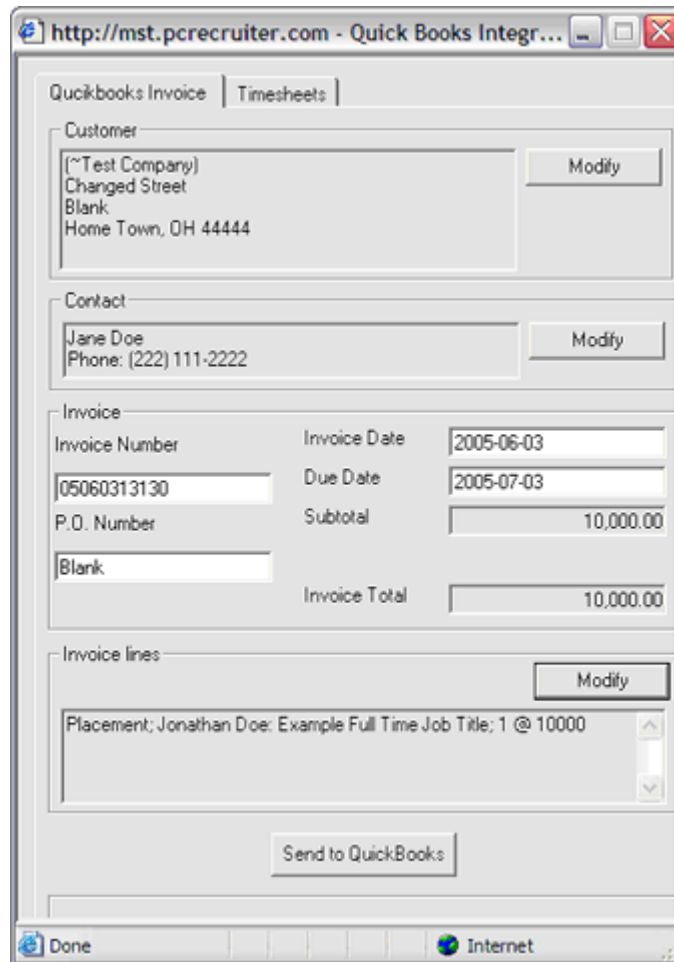
The screenshot shows a "Line Item Detail" dialog box with the following fields and values:

Account	Placement
Full Name	Jonathan Doe
Description	Example Full Time Job Title
Rate	10000
Quantity	1

At the bottom of the dialog are "Save" and "Cancel" buttons.

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:



The screenshot shows a web browser window titled "http://mst.pcrecruiter.com - Quick Books Integr...". The main content area is divided into several sections:

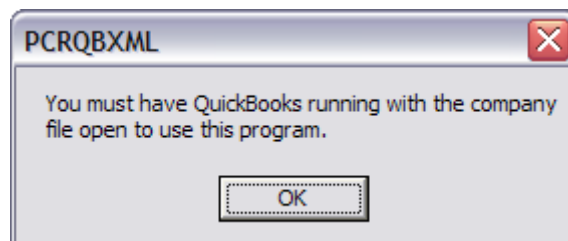
- Customer:** (~Test Company), Changed Street, Blank, Home Town, OH 44444. A "Modify" button is present.
- Contact:** Jane Doe, Phone: (222) 111-2222. A "Modify" button is present.
- Invoice:**

Invoice Number	Invoice Date	2005-06-03
05060313130	Due Date	2005-07-03
P.O. Number	Subtotal	10,000.00
Blank	Invoice Total	10,000.00
- Invoice lines:** Placement; Jonathan Doe: Example Full Time Job Title; 1 @ 10000. A "Modify" button is present.

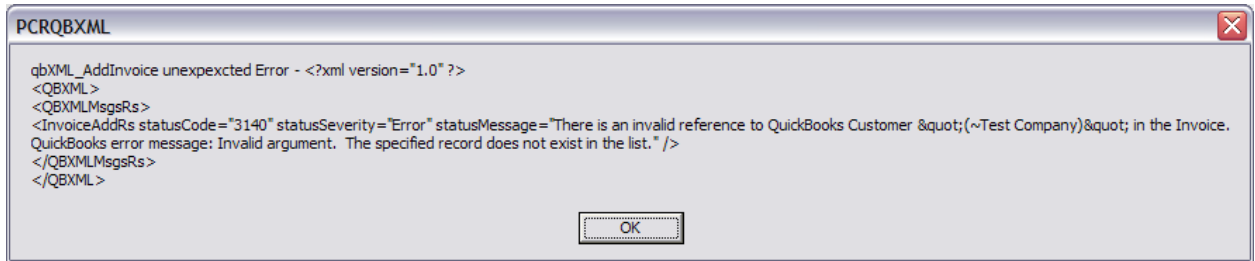
At the bottom of the form is a "Send to QuickBooks" button. The browser's status bar shows "Done" and "Internet".

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

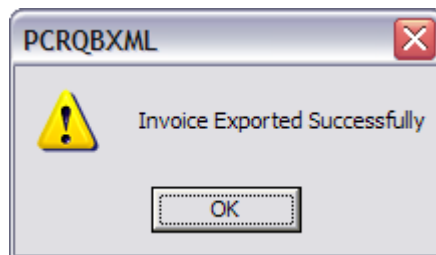
In order for the data to be successfully transferred, either QuickBooks, or the 'Remote Data Sharing Client' must be running locally. If the neither of these applications is running, the following message will be displayed:



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