Export Placements to QuickBooks

Integrations · https://learning.pcrecruiter.net/site/docs/integrations/export-to-quickbooks-online/

PCRecruiter now allows users to export Placements to QuickBooks Online. This feature is currently not available for Contractor Timesheets.

Activating QuickBooks Online Export

A user with Full Admin Security must first enable this feature for your database.

1. Select **System** from the main toolbar
2. Scroll down to **Database Setup**
3. Choose **Oauth Connection Settings**
4. Click **Connect to QuickBooks**
5. Enter your **QuickBooks credentials** into the QuickBooks login screen
6. Choose **Sign in**

Once the feature is enabled there is also some configuration that must be done in QuickBooks

Add Uncategorized Income as a New Income

1. Hover over **Accounting** on the toolbar on the left
2. Choose **Chart of Accounts**
3. **Search** the list to see if **Uncategorized Income** already exists
4. If it does not, click **New**
5. Choose **Income** for **Account Type**
6. Enter **Uncategorized Income** for **Name**
7. Choose **Service/Fee Income** for **Detail Type**
8. **Save and Close**

Add Permanent as a New Income

1. Check the same **Chart of Accounts** to see if **Permanent** already exists
2. If it does not, click **New**
3. Choose **Income** for **Account Type**
4. Enter **Permanent** for **Name**
5. Choose **Service/Fee Income** for **Detail Type**
6. **Save and Close**

Verify the Details

For the Placement data to transfer between PCR and QuickBooks the Company in PCR must match the Customer in QuickBooks. If it does not match add/edit the information in the Customers tab (sales).

Using QuickBooks Online Export

Now that the feature has been enabled you are able to export your placement data to QuickBooks Online. Prior to completing the following steps, a placement must be made; you can find directions here.

1. Open the **placement** record
2. Choose **Quickbooks** from the row of buttons at the bottom.
3. Click **Send to Quickbooks** at the bottom of the QuickBooks Invoice window that appears.
4. A confirmation will appear once the transfer is complete with the invoice number