

QUICKBOOKS INTERFACE

Part Number: 25022

DESCRIPTION:

The QuickBooks Interface allows you to export COMMANDbatch ticket data to an XML file which can be imported into the QuickBooks accounting system.

The Export utility is installed with COMMANDbatch. A Configuration tab on the Export Utility window controls how exported ticket data is grouped (by Customer or Order, not both), whether QuickBooks uses COMMANDbatch pricing, and how products will be listed on the invoice (line item or summarized by ticket group).

OPERATION:

- During the export process, tickets are grouped by either Customer or Order, depending on the export file configuration.
- Once tickets have been imported, an invoice transaction is set up in QuickBooks so you can review, edit and print invoices.

SYSTEM REQUIREMENTS:

- COMMANDbatch V1.5 or later must be installed.
- QuickBooks Pro 5.0, Pro 6.0, Pro or Premier 7.0, and Pro or Premier 2008 versions have been tested by CAI. Other versions or extensions, such as Enterprise, should function since the process involves the input or import portion of QuickBooks. Intuit also continues to support backward compatibility as their product moves forward.
- The QuickBooks Import Utility must be installed.
- Some customization of the XML translation may be required depending on the QuickBooks Invoice requirements.

IMPLEMENTATION:

- COMMANDbatch Customer Codes, Tax Codes, Credit Statuses, Mix and Other Product Codes, and Pricing information match similar information in QuickBooks.
- QuickBooks should run on a separate PC but the ideal configuration is QuickBooks and COMMANDbatch Remote Client running on the same PC.
- Using the QuickBooks Class feature, multiple COMMANDbatch locations can interface to QuickBooks on a single PC.
- Customization during installation may be required and operational training is provided.

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