PlanSwift Integration to QuickBooks Plugin

User Guide

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Overview

This guide will teach you how to properly use the tools and features found within the PlanSwift Integration to QuickBooks Plugin. It is designed for use with PlanSwift® Takeoff and Estimating Software. This guide is not meant to be a step-by-step "walk through" document, although it can be used as a reference for getting the work done. If you encounter technical difficulty, consult this guide (including the FAQ section of this user manual) or contact the technical support department at:

<div align="center">

PlanSwift® Technical Support

support@PlanSwift.com

1-888-752-6794 ext. 2

</div>

PlanSwift also offers additional training. For training options, contact the training department at:

<div align="center">

PlanSwift® Training Department

training@PlanSwift.com

1-888-752-6794 ext. 4

</div>

Purchasing and Installation

Purchasing Plugins

If you need to purchase PlanSwift or a plugin product, contact the Sales Department at:

PlanSwift® Sales

sales@PlanSwift.com

1-888-752-6794 Ext. 1

Installation and Uninstallation

Installing and uninstalling the PlanSwift Integration to QuickBooks Plugin is simple. To install it, launch the executable and follow the prompts (see figure below). For uninstalling, use your normal Windows uninstall method.
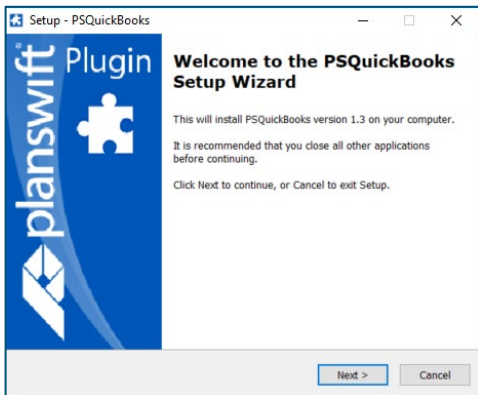
Features

The PlanSwift Integration to QuickBooks Plugin allows you to export selected estimating items from PlanSwift to Intuit® QuickBooks™ Desktop Pro, Premier, or Enterprise. PlanSwift Integration to QuickBooks adds an additional four icons to the PlanSwift **Estimating** tab ribbon-bar (Figure 1). These four icons provide these functions: **Invoice**, **Estimate**, **Purchase Order**, and **Item List**. We highly recommend purchasing a training package for accelerated learning and faster customization.
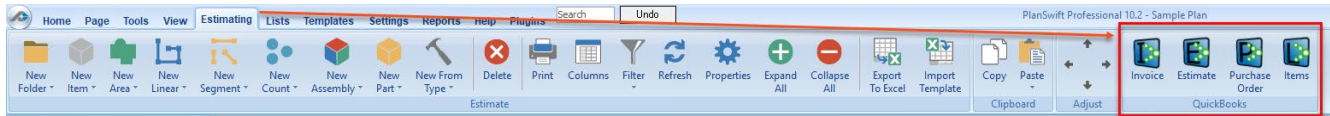
Figure 1

How To

How to: Integrate PlanSwift items to Invoices

The purpose of the **Invoices** function is to create a QuickBooks invoice from PlanSwift data. Follow the procedure below to create an invoice in QuickBooks from PlanSwift.

1. Open QuickBooks and select your company.
2. From PlanSwift, open the project you want to create an invoice for.
3. Open the **Estimating** tab in PlanSwift.
4. Select the estimating items from PlanSwift that are to be included in the invoice (see the arrows at 1 of Figure 2).
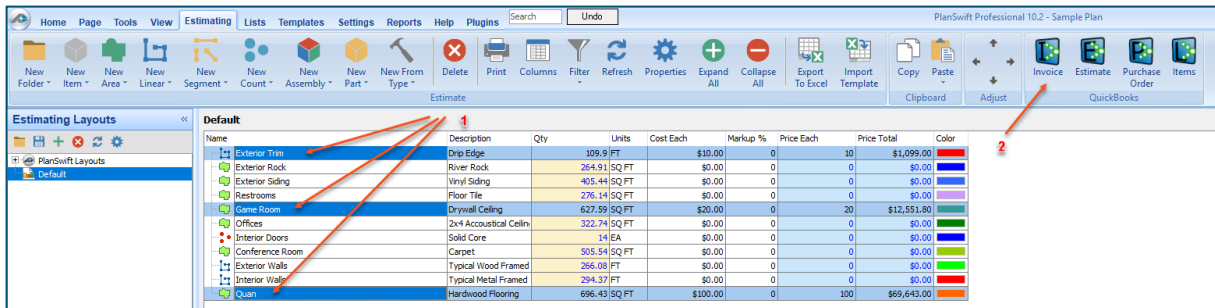
Figure 2

5. Click on the **Invoice** icon in the **QuickBooks** group of the **Estimating** tab ribbon-bar (arrow 2 of Figure 2).

6. This opens the **Invoice** window (Figure 3). The arrows in Figure 3 also show the correlation between the **Invoice** window and the invoice items that were selected in the Estimating tab.
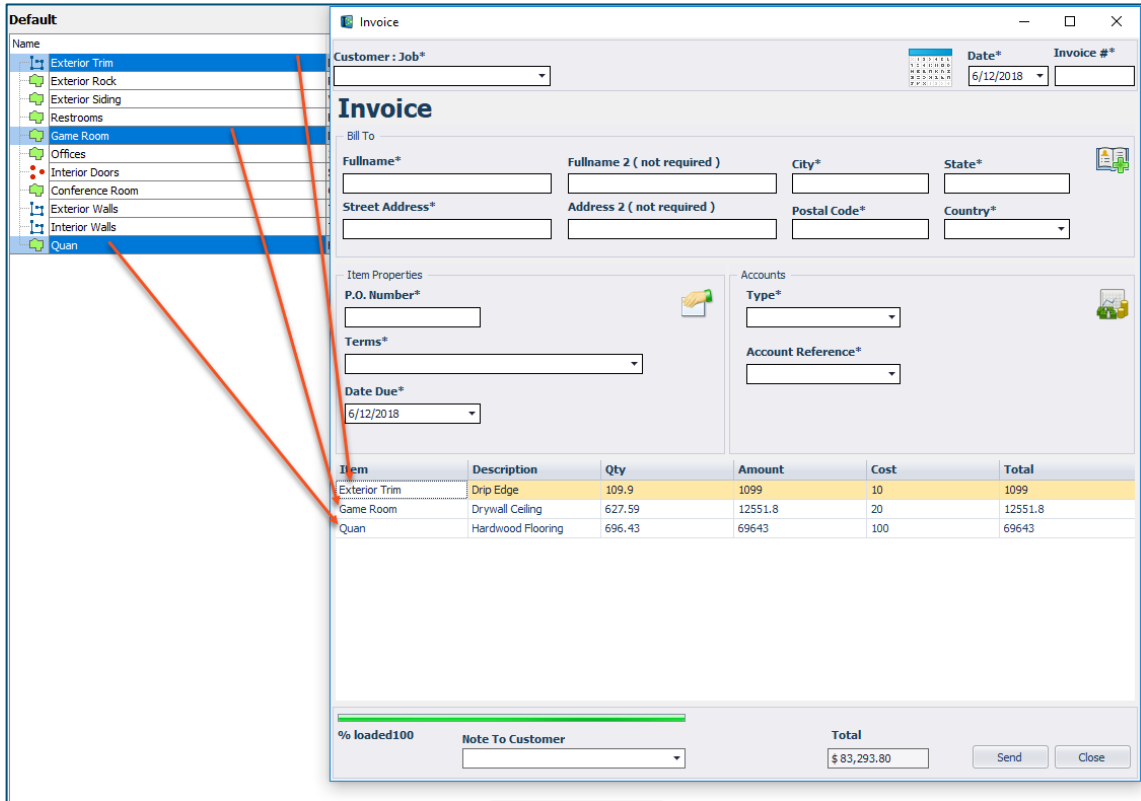

Figure 3

7. Fill in the required fields (marked with asterisks): **Customer: Job** (the customer the invoice is to be sent to), **Invoice #**, **P.O. Number**, **Terms**, **Type**, **Account Reference**, **Due Date**, and, optionally, any desired **Note To Customer** (see Figure 4).

Figure 4

8. Click on **Send** to create the invoice in QuickBooks. An **Activity Log** window indicates the transfer was successful (Figure 5).

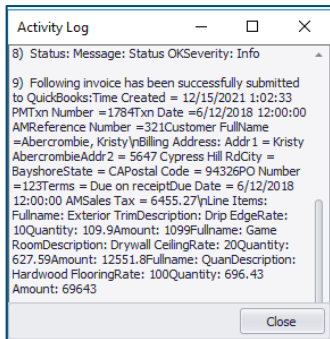**Figure 5**

9. Click on **Close** to close the **Activity Log** window. This also closes the **Invoice** window.
10. The invoice is now in QuickBooks. Go to QuickBooks and verify the invoice information was received (see Figure 6).
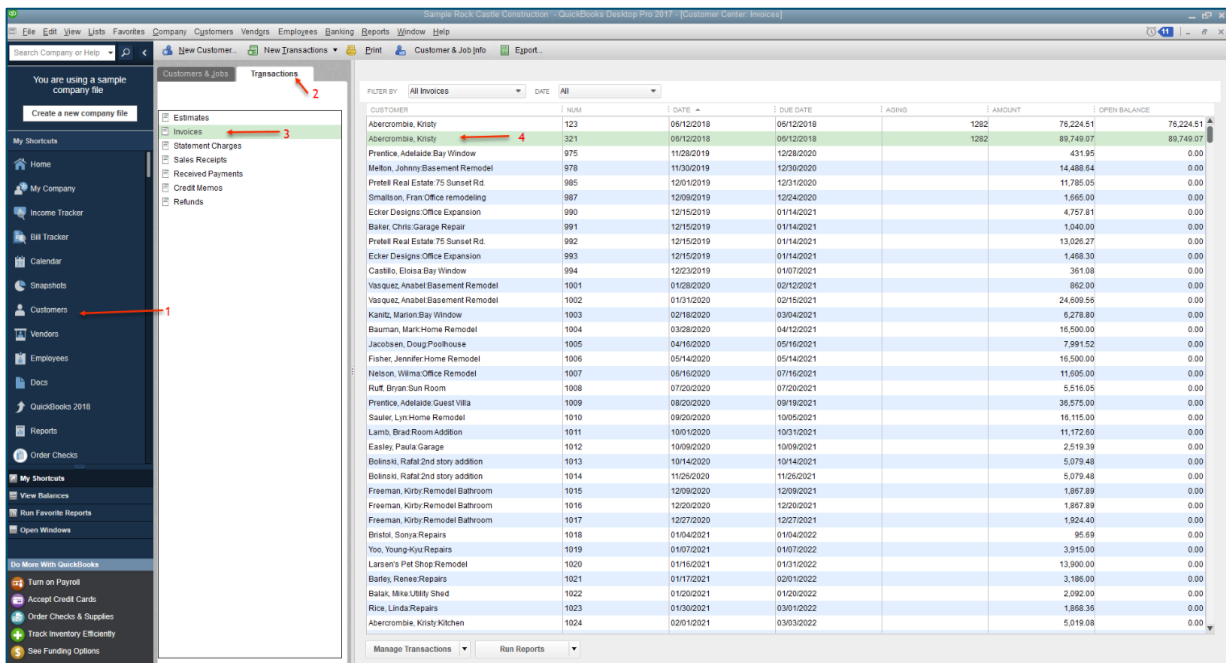

Figure 6

11. In QuickBooks, click on **Customers** (arrow 1 of Figure 6), **Transactions** (arrow 2 of Figure 6), **Invoices** (arrow 3 of Figure 6), and then the customer (arrow 4 of Figure 6). (This documentation was done using QuickBooks Desktop Pro 2017—your version of QuickBooks may differ.)

12. Double-clicking on the customer (arrow 4 of Figure 6) opens the QuickBooks Invoice with the PlanSwift data in it (Figure 7).
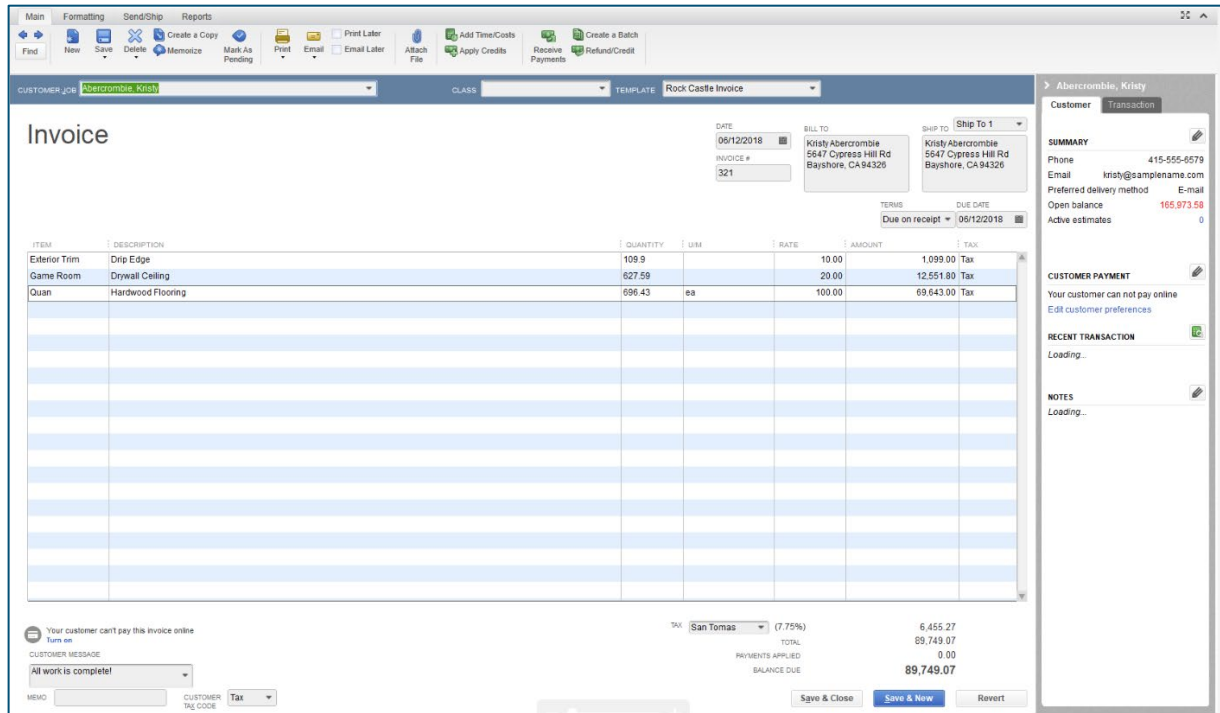

Figure 7

How to: Integrate PlanSwift Items to Estimates

The purpose of the **Estimates** function to create a QuickBooks estimate from estimating data in PlanSwift. Follow the procedure below to create an estimate in QuickBooks from PlanSwift.

1. Open QuickBooks and select your company.
2. From PlanSwift, open the project you want to create an Estimate for.
3. Open the **Estimating** tab in PlanSwift.

4. Select the estimating items from PlanSwift that are to be included in the estimate (see the arrows at 1 of Figure 8).
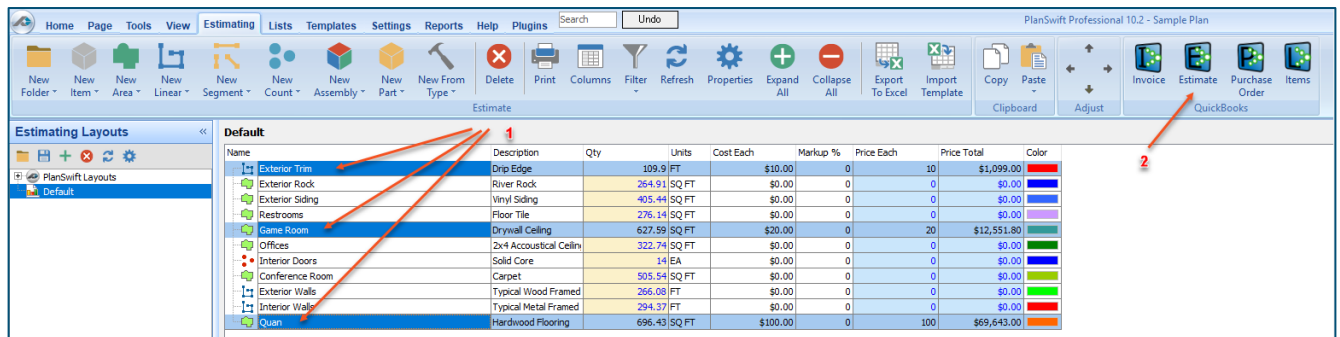

Figure 8

5. Click on the **Estimate** icon in the **QuickBooks** group of the **Estimating** tab ribbon-bar (arrow 2 of Figure 8).

6. This opens the **Estimate** window (Figure 9). The arrows in Figure 9 also show the correlation between the **Estimate** window and the estimate items that were selected in the Estimating tab. Fill in the required fields (marked with asterisks): **Customer: Job** (the customer the estimate is to be sent to), **Estimate #**, **Type**, **Account Reference**, **Due Date**, and, optionally, any desired **Note To Customer**.
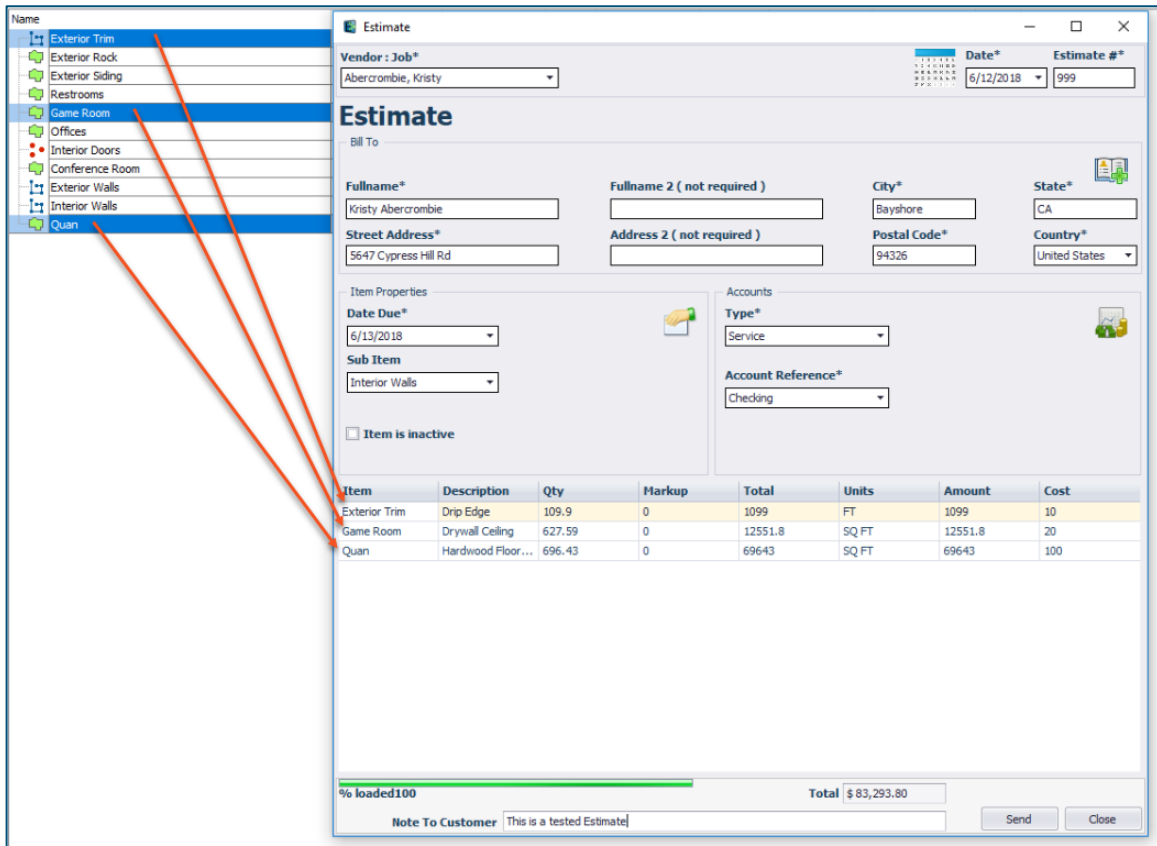

Figure 9

7. Click on **Send** to create the estimate in QuickBooks. An **Activity Log** window indicates the transfer was successful (Figure 10).
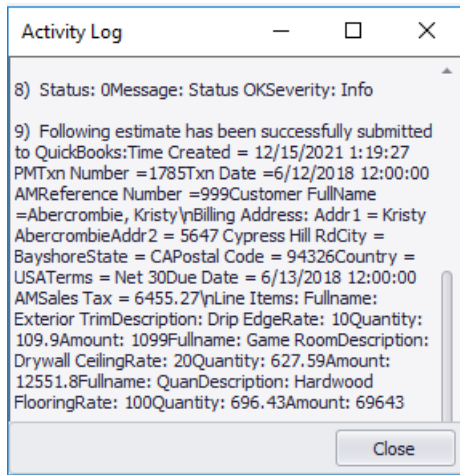

Figure 10

8. Click on Close to close the Activity Log window. This also closes the Estimate window.

9. The estimate is now in QuickBooks. Go to QuickBooks and verify the estimate information was received (see Figure 11). Click on **Customers** (arrow 1 of Figure 11), **Transactions** (arrow 2 of Figure 11), **Estimates** (arrow 3 of Figure 11), and then the customer (arrow 4 of Figure 11). (This documentation was done using QuickBooks Desktop Pro 2017—your version of QuickBooks may differ.)
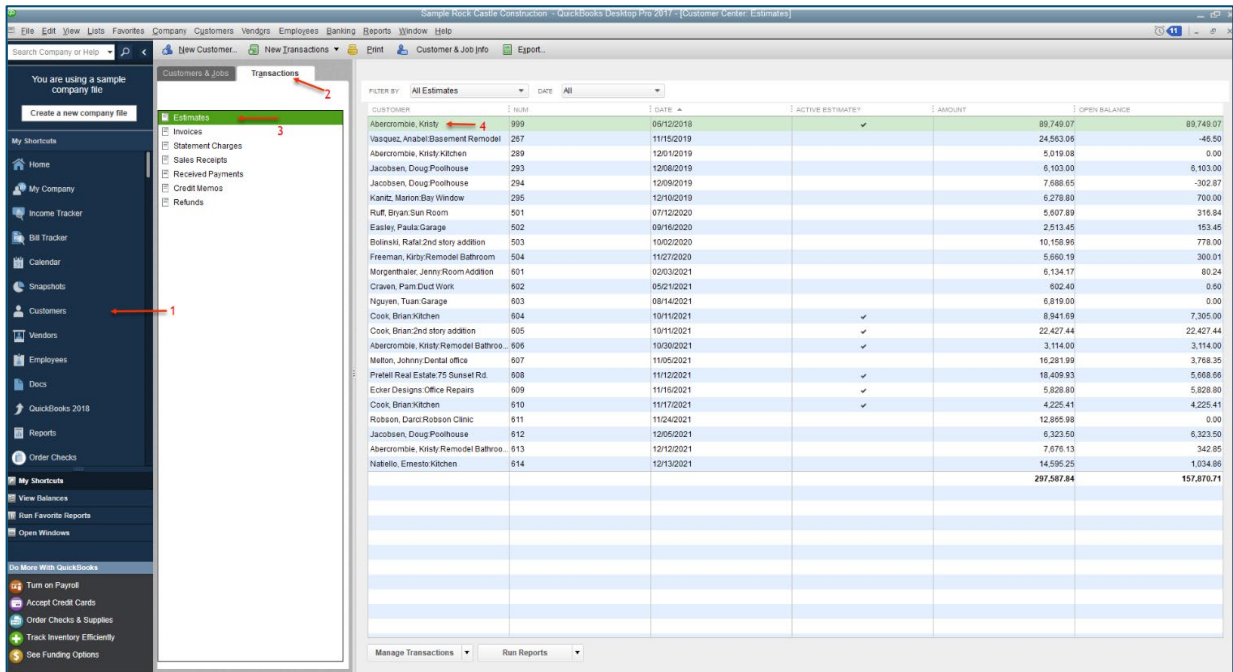

Figure 11

10. Double-clicking on the customer (arrow 4 on Figure 11) opens the QuickBooks Invoice with the PlanSwift data in it (Figure 12).
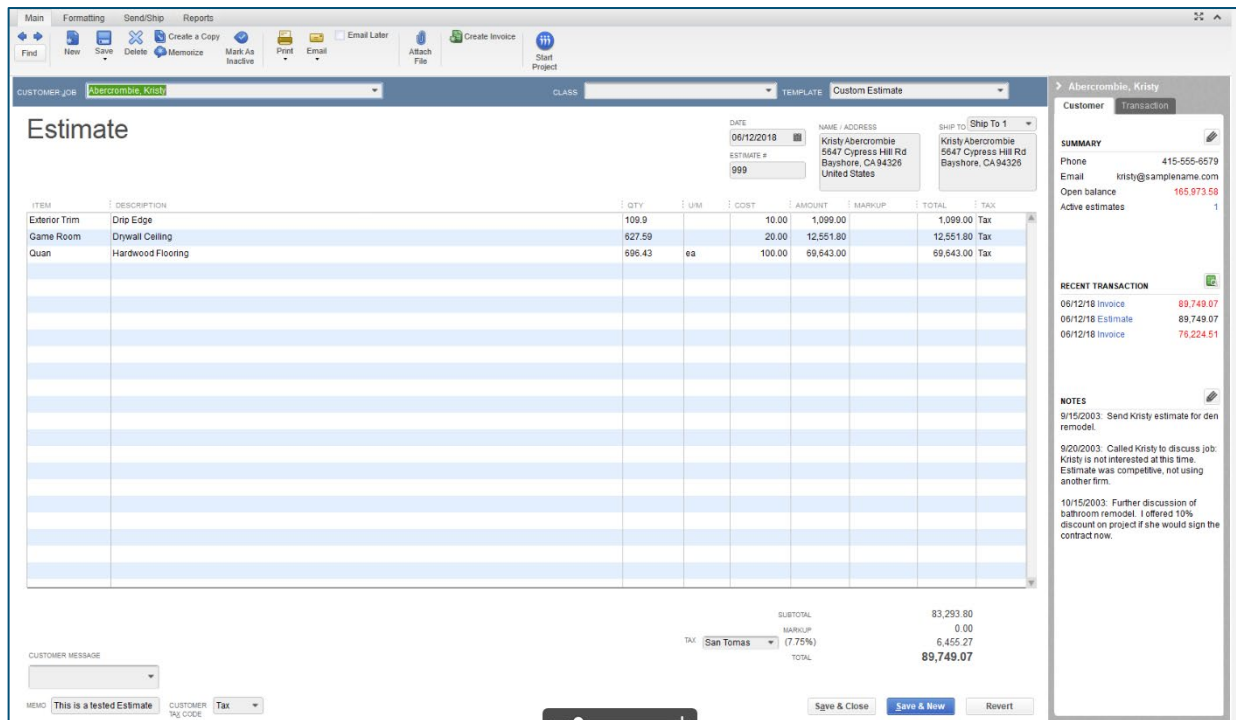

Figure 12

How to: Integrate PlanSwift Items to Purchase Orders

The purpose of the **Purchase Orders** function to create a QuickBooks purchase order from PlanSwift estimating data. Follow the procedure below to create a purchase order in QuickBooks from PlanSwift.

1. Open QuickBooks and select your company.
2. From PlanSwift, open the project you want to create a purchase order for.
3. Open the **Estimating** tab in PlanSwift.
4. Select the estimating items from PlanSwift that are to be included in the purchase order (see the arrows at 1 of Figure 13).
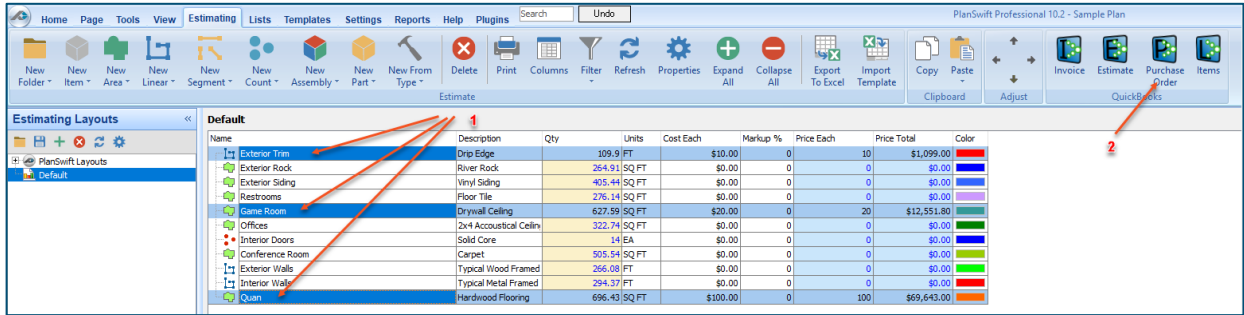
Figure 13

5. Click on the **Purchase Order** icon (arrow 2 of Figure 13) in the **QuickBooks** group of the **Estimating** tab ribbon-bar.

6. This opens the **Purchase Order** window (Figure 14). The arrows in Figure 14 also show the correlation between the **Estimate** window and the estimate items that were selected in the Estimating tab. Fill in the required fields (marked with asterisks): **Vendor: Job** (the vendor the estimate is to be sent to), **Type**, **Account Reference**, **Due Date**, and, optionally, any desired **Memo**.
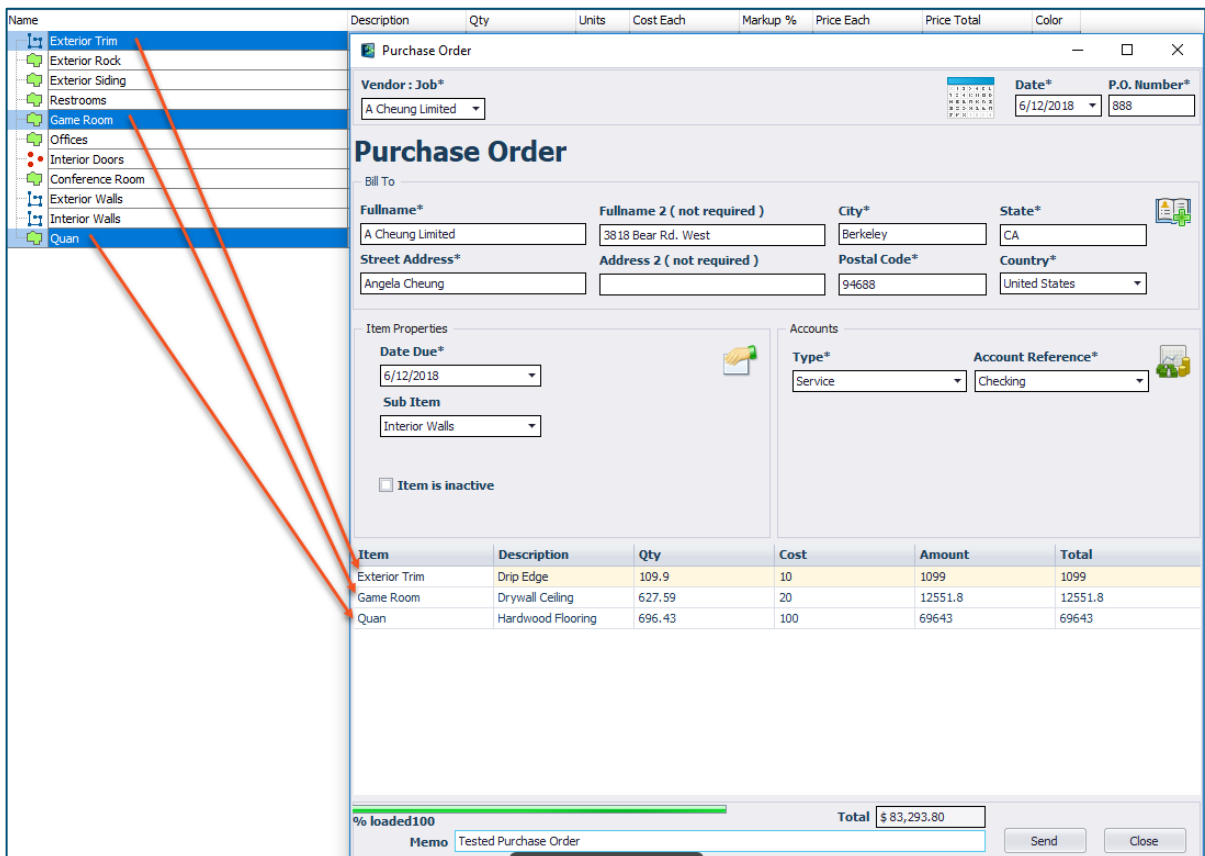
Figure 14

7. Click on **Send** to create the purchase order in QuickBooks. An **Activity Log** window indicates the transfer was successful (Figure 15).
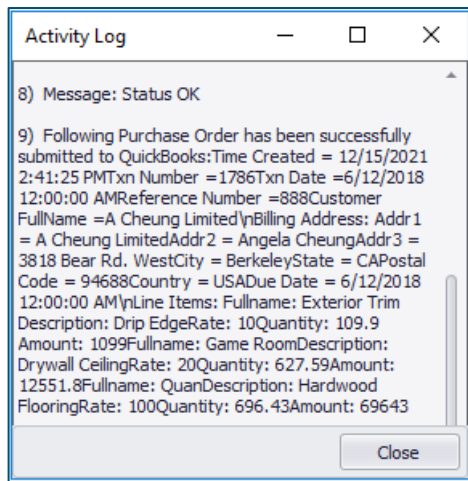
Figure 15

8. Click on **Close** to close the **Activity Log** window. This also closes the **Purchase Order** window.

9. The purchase order information is now in QuickBooks. Go to QuickBooks and verify the estimate information was received (see Figure 16). Click on **Vendors** (arrow 1 of Figure 16), **Transactions** (arrow 2 of Figure 16), **Purchase Orders** (arrow 3 of Figure 16), and then the customer (arrow 4 of Figure 16). (This documentation was done using QuickBooks Desktop Pro 2017—your version of QuickBooks may differ.)
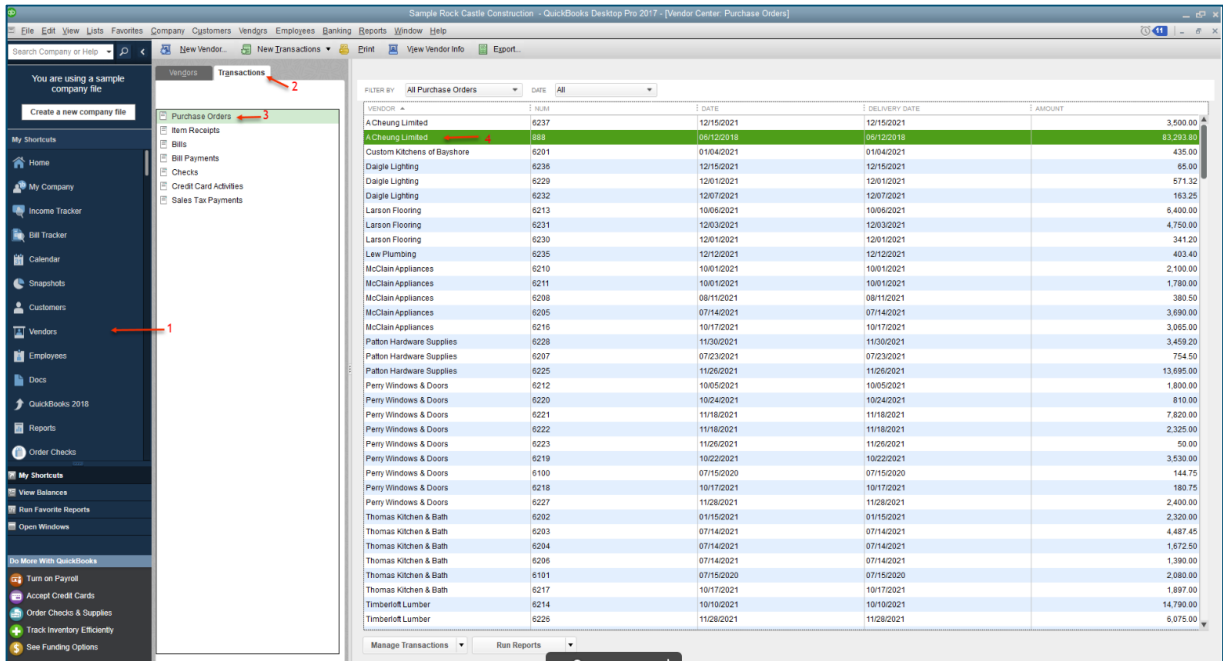
Figure 16

10. Double-clicking on the customer opens the QuickBooks Purchase Order with the PlanSwift data in it (Figure 17).
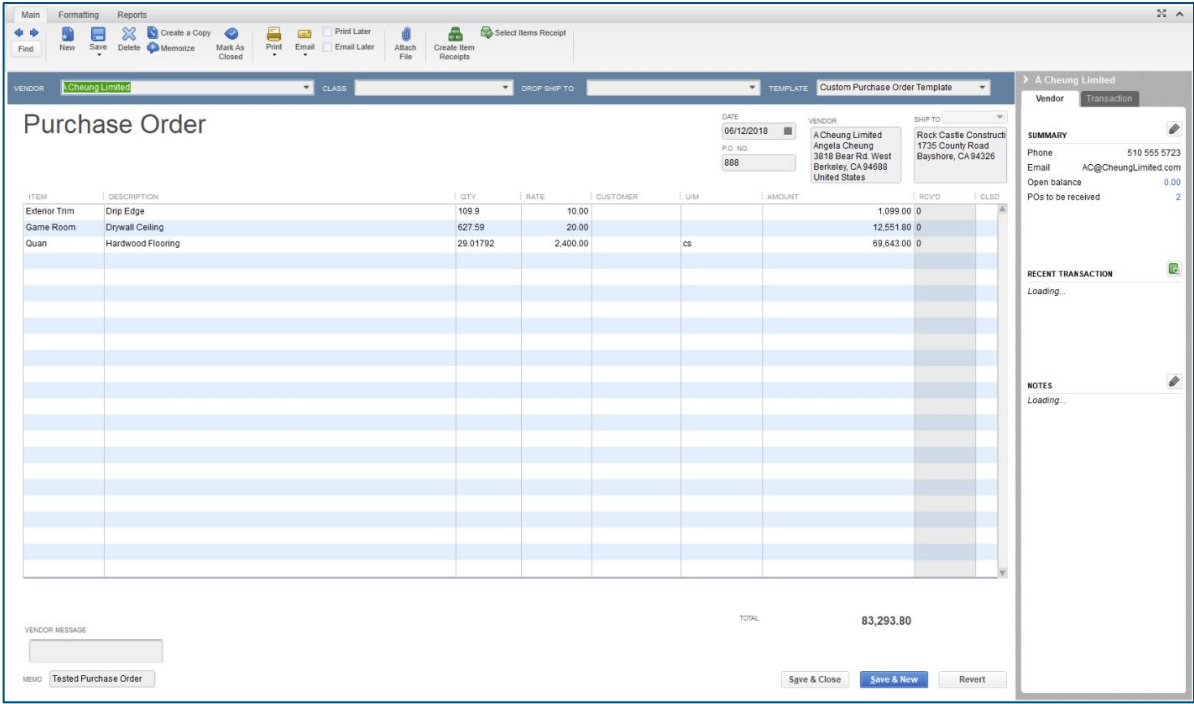
Figure 17

How to: Integrate PlanSwift Items to Generic Item Lists

The purpose of the **Items** function to add a list of items from a PlanSwift estimate to the QuickBooks Item List. Follow the procedure below to add a list of items from PlanSwift to QuickBooks.

1. Open QuickBooks and select your company.
2. From PlanSwift, open the project you want to create a list of items from.
3. Open the **Estimating** tab on the PlanSwift home ribbon-bar tab.

4. Select the items from PlanSwift that are to be included in the list of items (see the arrows at 1 of Figure 18).
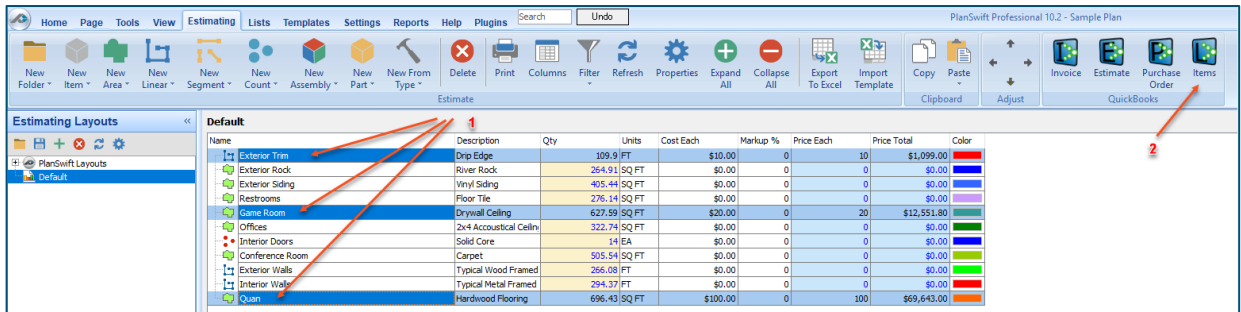
Figure 18

5. Click on the **Items** icon (arrow 2 of Figure 18) in the **QuickBooks** group of the **Estimating** tab ribbon-bar.
6. This opens the **Item List** window (Figure 19). The arrows in Figure 19 also show the correlation between the **Estimate** window and the items that were selected in the Estimating tab. Fill in the required fields (marked with asterisks): the account **Type** and the **Account Reference**.
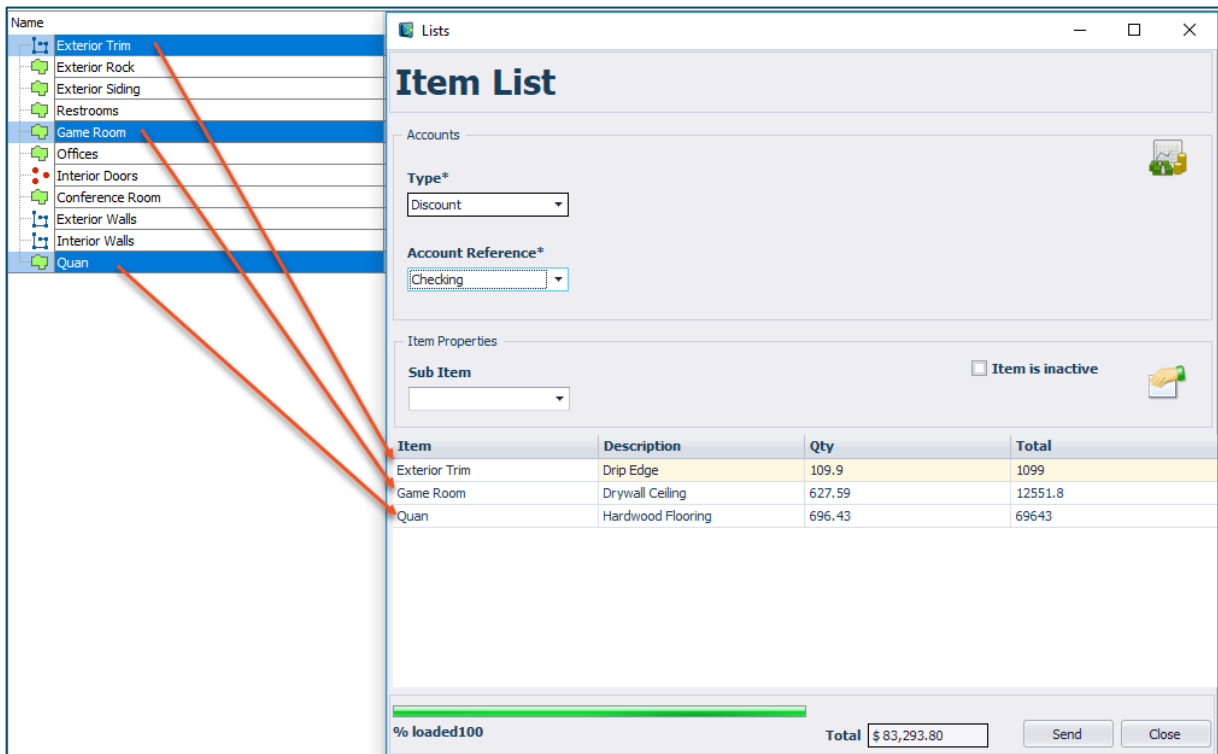
Figure 19

7. Click on **Send** to create the item list in QuickBooks. An **Activity Log** window indicates the transfer was successful (Figure 20).
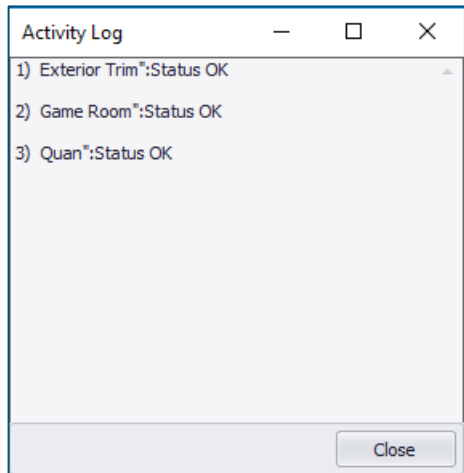
Figure 20

8. Click on **Close** to close the **Activity Log** window. This also closes the **Item List** window.

9. The **Item List** information is now in QuickBooks. Go to QuickBooks and verify the list of items was received (see Figure 21). Click on **Item** (arrow 1 of Figure 21). The items that were transferred are visible at arrow 2 of Figure 21. (This documentation was done using QuickBooks Desktop Pro 2017—your version of QuickBooks may differ.)

Figure 21

FAQ

Question: I've read this user guide, and I still have questions. What do I do?

> **Answer:** PlanSwift recommends that you purchase a training package. We highly recommend new users purchase a training package, because training is customized to each user. We offer one-on-one training and classroom training. Contact training@PlanSwift.com or at 1-888-752-6794 Ext. 4.

Question: Will this work with the online version of QuickBooks?

> **Answer:** No. PlanSwift only works with Intuit QuickBooks Desktop Pro, Premier, and Enterprise products.