QuickBooks Integration
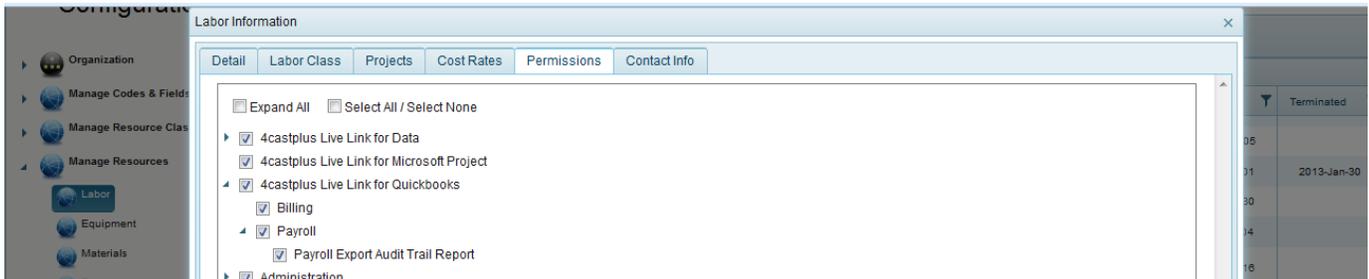
The **4castplus QuickBooks Integration** includes the following export workflows:

- Invoice Export: Create your customer invoices in 4castplus, taking advantage of the integrated data capture and approval workflows . Generate your customized customer-facing invoice using the wide variety of back-up and template options in Projects > Billing. When ready, export your customer invoices to QuickBooks using the App Link for Invoicing - eliminate any need for duplicate data entry.

- Payroll Export: Capture all of your resource hours for effective and efficient project and labor management. Utilize the HR time capture workflows in 4castplus to track banked time, vacation time and other overhead hours in addition to your direct project hours. Take advantage of the control and approval workflows in 4castplus to ensure that all payroll hours are valid and complete. When ready, export your labor time to QuickBooks for payroll processing using the App Link for Payroll.

Updating Labor Profiles - Permissions

The App Link Export workflows are permissioned workflows. To set up a labor resource with access to the App Link Export workflows:

1. Open the **Labor Resource - Permissions** tab.
2. Select the **QuickBooks App Link – Billing or Payroll** permission**.**
3. Select **Save and Close** or **Cancel.**
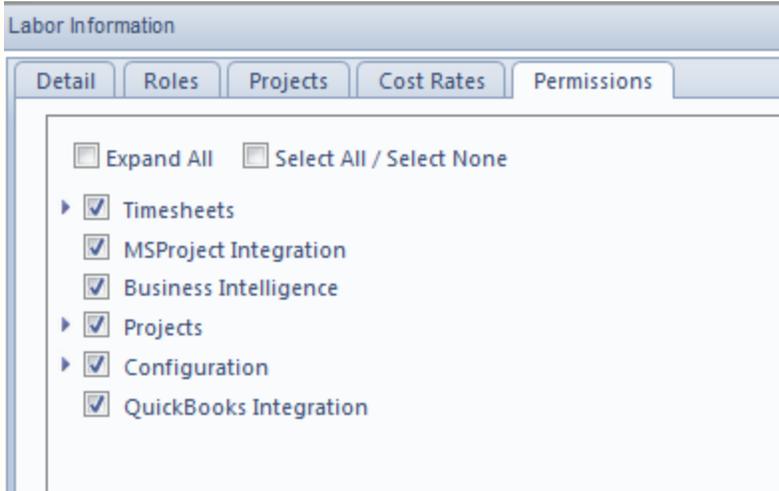

Download the App Link

The first step in the workflow is to download and configure the QuickBooks App Link.

> The 4castplus QuickBooks App Link is an add-on paid feature and must be enabled for your company account in order to access this feature. Should you wish to use the QuickBooks App Link, please contact support@4castplus.com for more information.
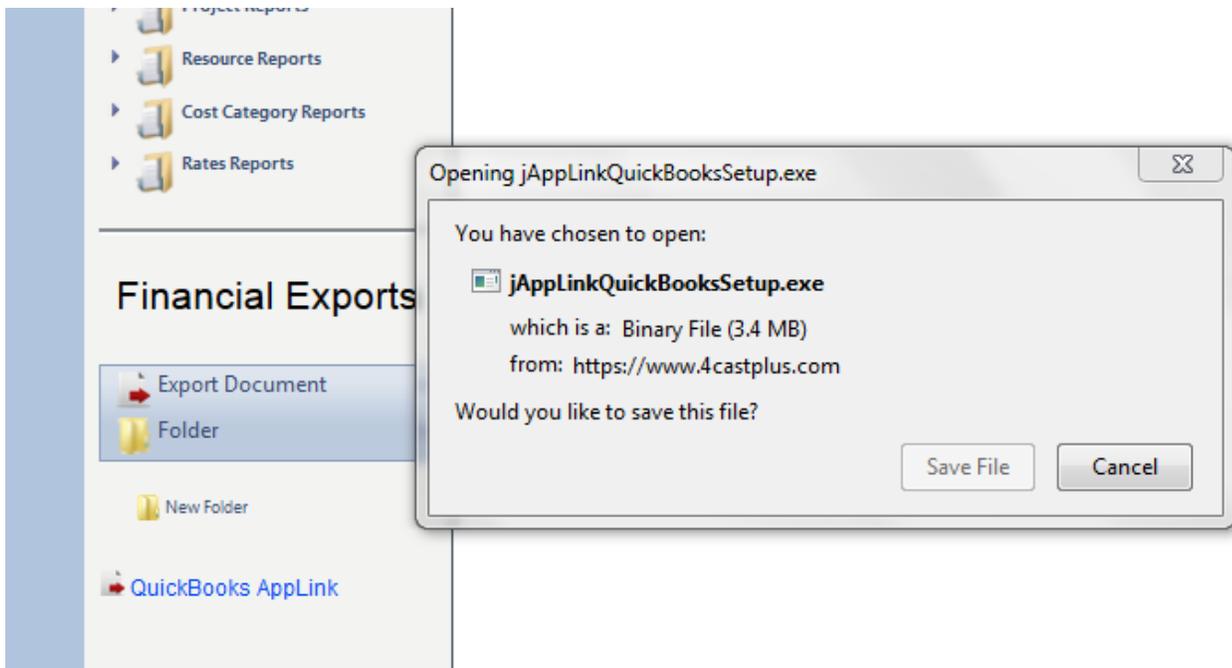
Open **Business Intelligence.**

1. In the lower-left corner of the Business Intelligence tree, click on **QuickBooks App Link.**
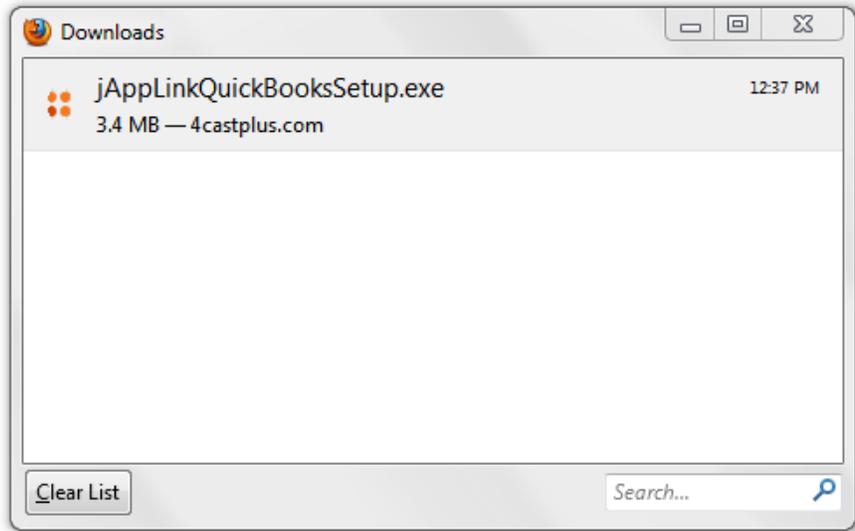
> Can't see the QuickBooks App Link? Access to the App Link is a permissioned feature - check with your Administrator that you have been enabled with the QuickBooks Integratation permission.
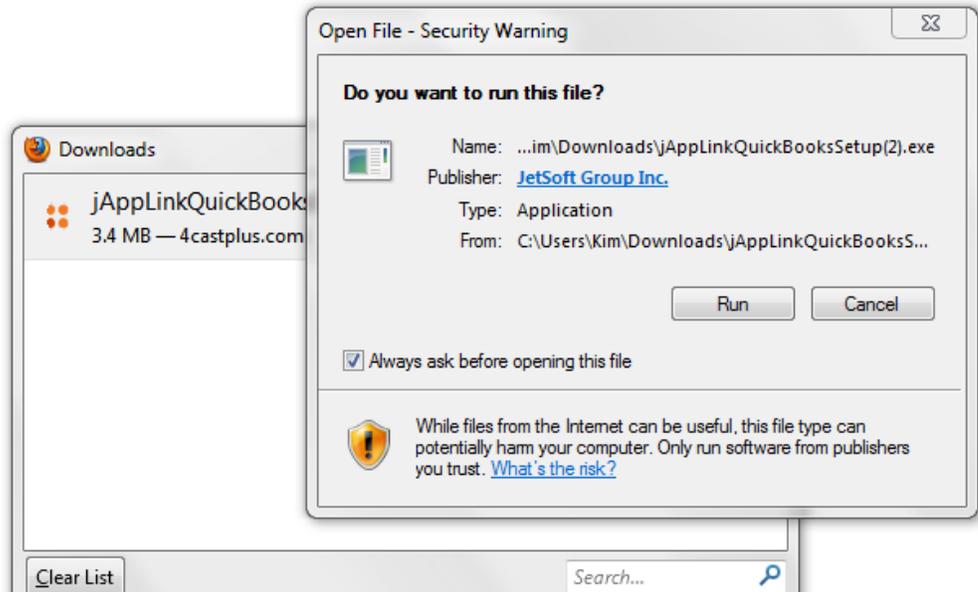
3. After clicking on the App Link, a download screen will appear. Click on **Save File.**

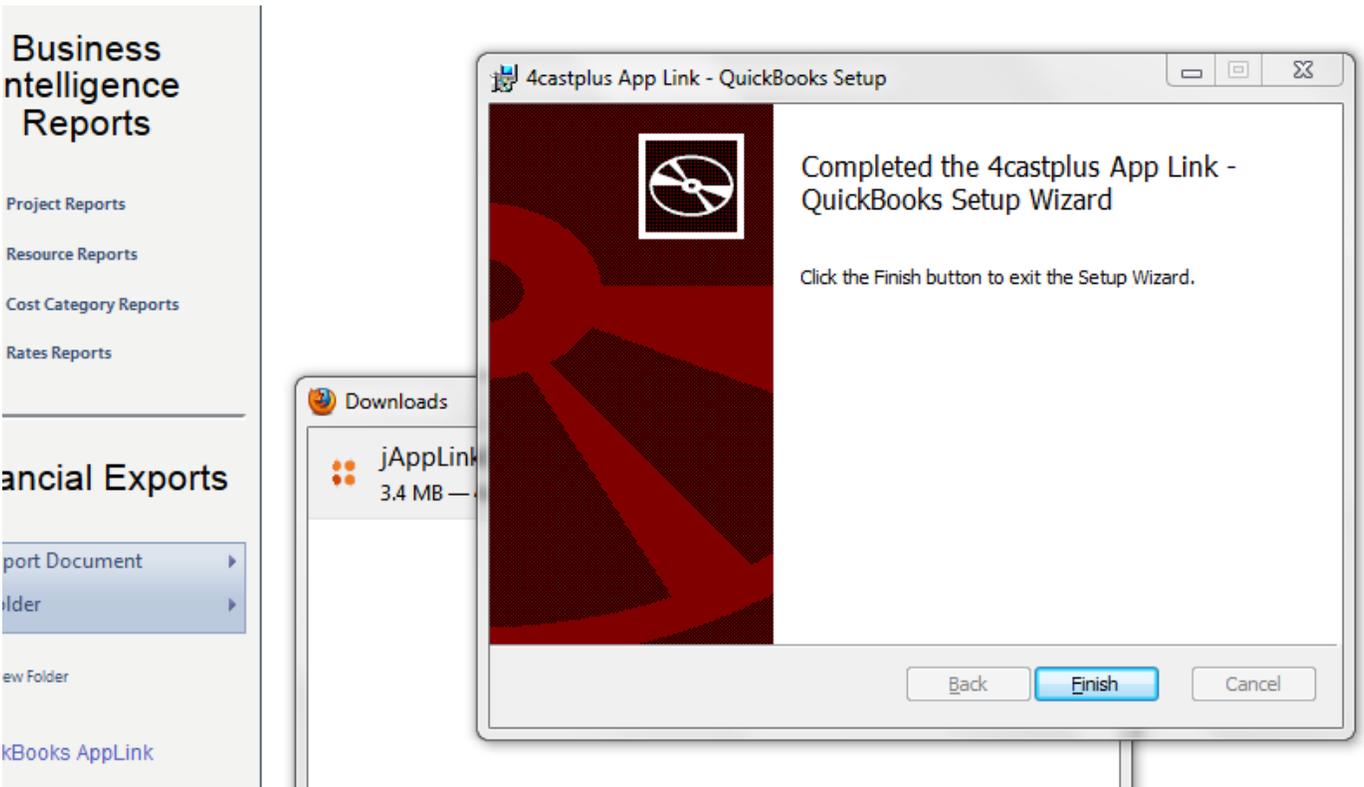4. Click on **jAppLinkQuickBooksSetup.exe** to download the App Link file.

5. Click on **Run.**

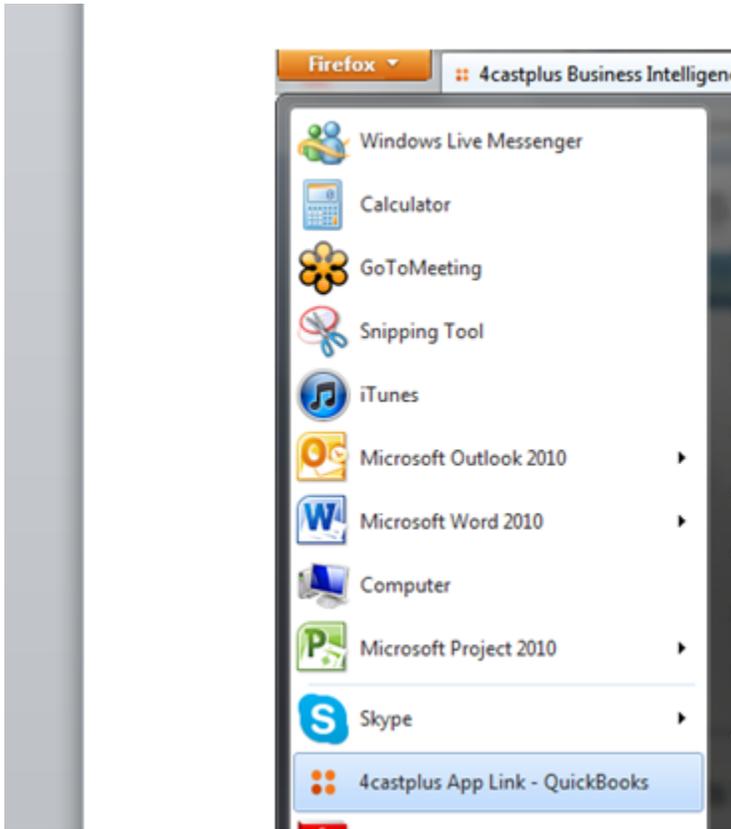6. The 4castplus App Link - QuickBooks Setup Wizard will appear. Click on **Next** to start the installation process.

7. Once the App Link has finished installing, click on **Finish.**

Configure the 4castplus QuickBooks App Link

Once the App Link has completed installing, a short cut to the App Link will appear in your Windows Program menu.

1. Click on the **4castplus App Link - Quickbooks** link. The next screen you will see is the App Link log-in.

Let's take a look at the fields in the Log In screen:

1. **Website**: choose either the Production or Training website. Production is the company account that your live data and reports are recorded in. Training is your company training account, where you can "practice" and self-train on 4castplus and its components.
2. **Email Address**: enter the same email address that you use to access your 4castplus account
3. **Password:** enter the same password that you use to access your 4castplus account
4. Click on **Log In** to open the App Link.