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QuickBooks Integration Enhancement

eStatus.net is proud to present a new tool for Subscribers



**QuickBooks
Integration**

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QuickBooks Integration Enhancement

- ▶ Save Time
- ▶ Reduce Risk of Errors
- ▶ Reduce Administrative Burden

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QuickBooks Integration Enhancement

New eStatus QuickBooks Integration Application will

- ▶ Add a new customer
- ▶ Create an invoice when the work is done
- ▶ Mark the invoice paid when payment is received

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QuickBooks Integration Enhancement



How can you get access to
the QB Integration
Application?

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QuickBooks Integration Enhancement

- ▶ Become a Gold Subscriber
- ▶ Download the Integration Software

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You are logged in as *Finnish, Rea.* ([logout](#)) Wednesday April 21, 2004

[Create New Claim](#)

Claim Issues

- ▶ [New Claim](#)
- ▶ [Current Claims](#)
- ▶ [Search](#)

Reports

- ▶ [Paid Claims](#)
- ▶ [Open Claims](#)

Help

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Current Claims

Claim Id	Company	Customer	Date Received	Actions
338950	Atlas Van Lines	John Shipper	01/06/2004	Edit Progress Report
338953	Zulu Moving and Storage	Jane Shipper	01/06/2004	Edit Progress Report
339266	Unirisc, Orlando	Melody Galloway	02/24/2004	Edit Progress Report
339411	Zulu Moving and Storage	Brooks	03/08/2004	Edit Progress Report
339484	Zulu Moving and Storage	Mike	03/12/2004	Edit Progress Report
339527	Zulu Moving and Storage	Jill Shipper	03/18/2004	Edit Progress Report
339594	Zulu Moving and Storage	Invoice One	04/20/2004	Edit Progress Report

Legend:

- 1-9 Days
- 10-20 Days
- 21-29 Days
- 30 Days or More

Internet

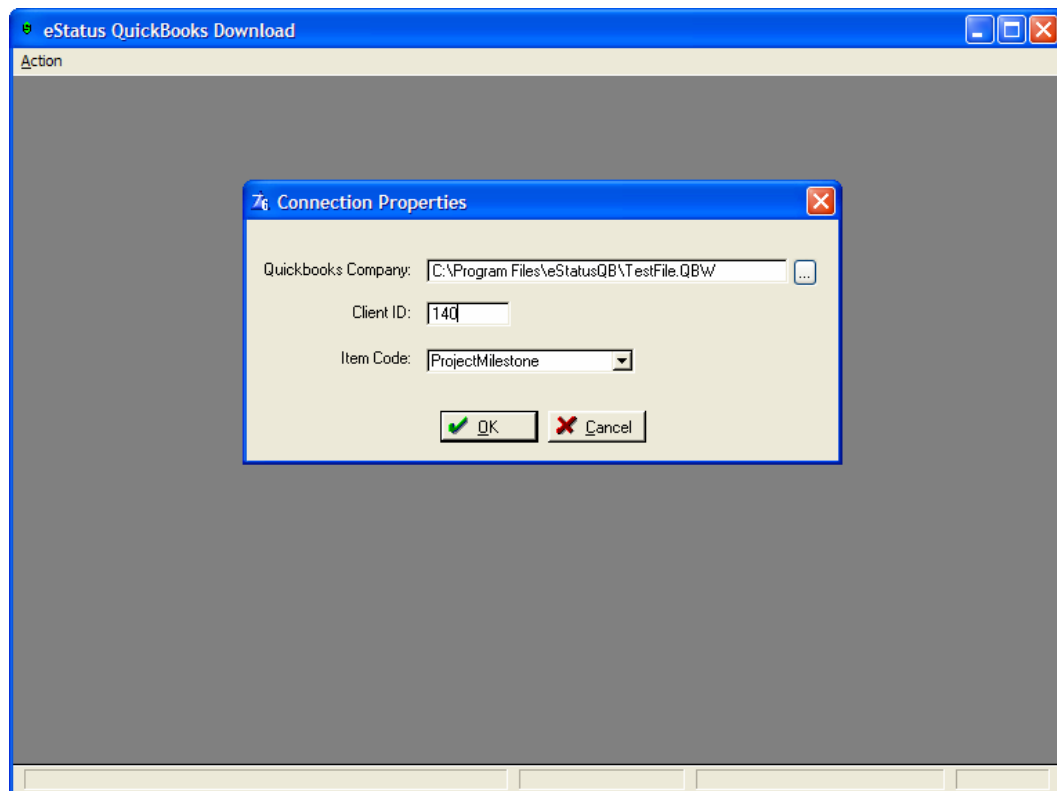


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Install the application and complete this simple setup routine

- ▶ Select the QuickBooks company file
- ▶ Input your eStatus client ID
- ▶ Pick the Item from QuickBooks for invoicing



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- ▶ After updates are made in eStatus, run the application from your desktop

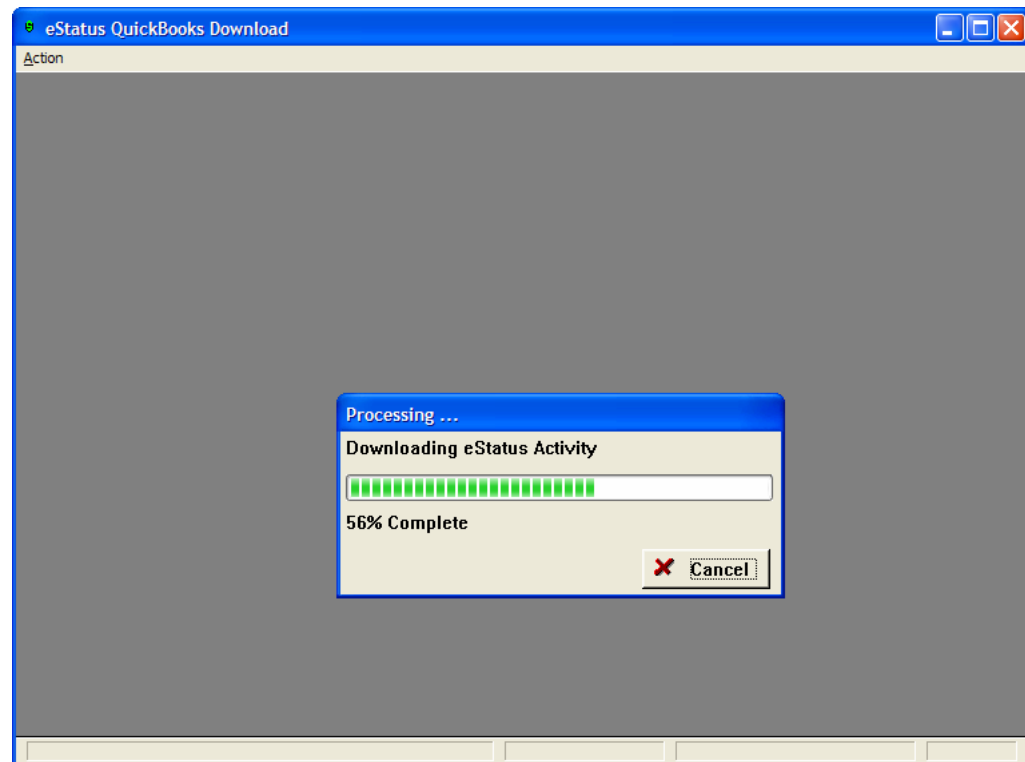


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QB

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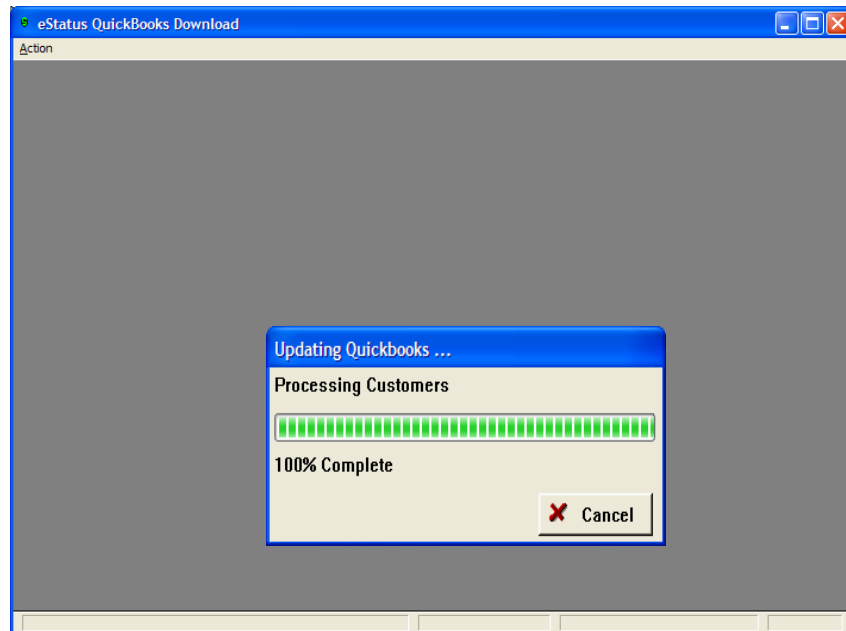
► The application will connect to the eStatus web server and look for updated transactions



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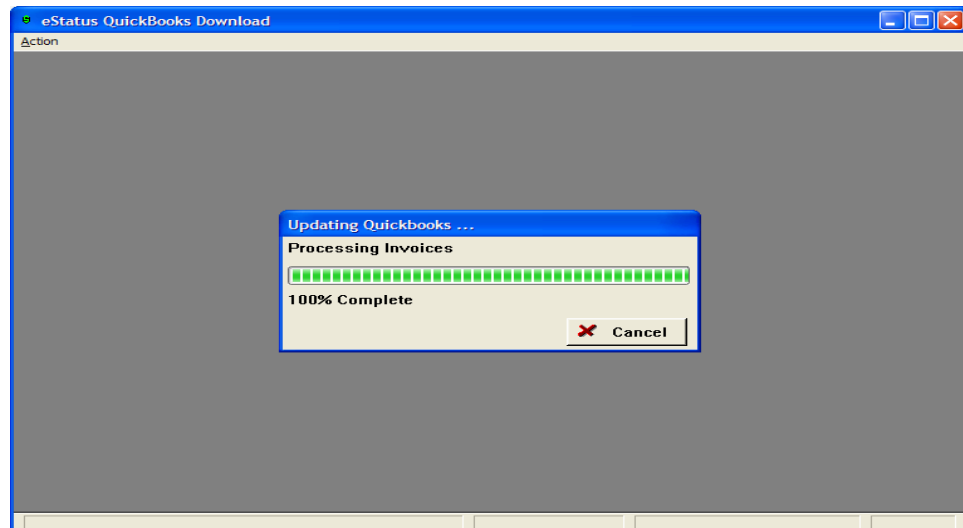
► The application will compare any new claims with the customer list in QuickBooks and add new customers automatically



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► Then it will locate all claims where you indicated “work completed” and will create invoices for those claims



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- ▶ Each downloaded transaction is marked, so that it won't be downloaded more than once
- ▶ Each invoice is created using the template you've selected and the QuickBooks item you selected during setup
- ▶ You may invoice through QuickBooks or through your eStatus final report

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► This invoice was created automatically from eStatus entries

The screenshot shows the 'Create Invoices' window in QuickBooks Pro 2002. The window title is 'Furniture Medic by DB - QuickBooks Pro 2002'. The menu bar includes File, Edit, View, Lists, Company, Customers, Vendors, Employees, Banking, Reports, Window, and Help. The toolbar contains icons for Invoice, Cust, Item, MemTx, Vend, Check, Bill, Reg, Acct, Rmnd, Find, Support, and Backup. The 'Create Invoices' window has a 'How Do I?' button and navigation buttons (Previous, Next, Print, Send). The 'Customer/Job' field is set to 'Cathcart Allied'. The 'Form Template' is 'Excelovation Invoice'. The 'Date' is '04/21/2004' and the 'Invoice #' is '04.1042'. The 'Bill To' address is 'Cathcart Allied, 1775 Founders Parkway, Alpharetta, GA 30004'. The 'P.O. No.', 'Terms', and 'Due Date' fields are empty. The 'Due Date' is set to '04/21/2004'. The 'Item' table has the following data:

Item	Description	Rate	Amount
CampaignCreate	Upholstered Chair:Damage to front right leg	150.00	150.00
CampaignCreate	Hall Tree:Top broken	75.00	75.00
CampaignCreate	Dining Room Table:Top scratched	400.00	400.00

The 'Total' is 625.00. The 'Balance Due' is 625.00. The 'Memo' field is empty. The 'To be printed' checkbox is checked. The 'To be sent' checkbox is unchecked. The 'Save & Close', 'Save & New', and 'Revert' buttons are visible. A footer note reads: 'Collaborate and share information with employees, clients, and others quickly, easily with QuickBase.'

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► Your standard invoice format will be used automatically

The screenshot shows the 'Create Invoices' window in QuickBooks Pro 2002. The window title is 'Furniture Medic by DB - QuickBooks Pro 2002'. The menu bar includes File, Edit, View, Lists, Company, Customers, Vendgrs, Employees, Banking, Reports, Window, and Help. The toolbar contains icons for Invoice, Cust, Item, MemTx, Vend, Check, Bill, Reg, Acct, Rmnd, Find, Support, and Backup. The 'Create Invoices' window has a 'How Do I?' button and navigation buttons (Previous, Next, Print, Send). The 'Customer/Job' dropdown is set to 'Cathcart Allied'. The 'Form Template' is 'Excelvation Invoice'. The 'Date' is 04/21/2004 and the 'Invoice #' is 04.1042. The 'Bill To' address is Cathcart Allied, 1775 Founders Parkway, Alpharetta, GA 30004. The 'P.O. No.' is blank, 'Terms' is blank, and 'Due Date' is 04/21/2004. The invoice table has columns for Item, Description, Rate, and Amount. The table contains three rows of 'RepairService' items, each with a rate of 0.00 and an amount of 0.00. The 'Total' is 0.00. The 'Balance Due' is 0.00. The 'To be printed' checkbox is checked. The 'Memo' field is empty. The window has 'Save & Close', 'Save & New', and 'Revert' buttons. A footer note says 'Collaborate and share information with employees, clients, and others quickly, easily with QuickBase.'

Item	Description	Rate	Amount
RepairService	Repair Service	0.00	0.00
RepairService	Repair Service	0.00	0.00
RepairService	Repair Service	0.00	0.00

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- ▶ The new QuickBooks Integration application takes advantage of the information stored in eStatus and frees up your time to run your business
- ▶ Ask about the Gold Subscription today!

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