HearForm11

Office Management

Software

HearForm & QuickBooks

HearForm offers a time saving method for transferring financial data to QuickBooks

How does HearForm (HF) integrate with QuickBooks (QB)?

HearForm is the natural place to start the transfer process. Since you will likely have many more contacts in HF than in QB (think prospects who have not purchased anything,) our process takes financial data from HF and sends it to QB. (We do not pull financial data from QB into HF.)

From HearForm   ……….   To QuickBooks

CUSTOMERS

HF allows you to associate your patients with a previous "customer" in QB. If you choose not to associate your patient, HF will automatically create a customer in QB for you. HF adds the customer's Full Name, Street, City, State, Zip and Primary Telephone number to the new customer record. The HF "Key" (unique identifier) is appended to the QB customer name, allowing for unlimited *John Smiths* (common names) without needing to change something about the common name.

INVOICES

HF then creates a new invoice in QB with the same information you entered in the HF invoice. An invoice will include line item detail such as…

- Description of product or service
- QTY
- $ Charge
- Sales Tax amount (if applicable)
- Adjustments are created on a separate line item as "adjustment"

Item categories in QB should match the item field in HF exactly (i.e. Hearing Instrument in both HF and QB, not *Hearing Instrument* in one and *Hearing Aid* in the other.)

Items are associated with a designated account in QB automatically by QB. Clinicians (audiologists and dispensers) assigned to an invoice in HF are sent to the *Sales Rep* field in QB. The Assigned Office in HF is sent to a designated invoice Class in QB (for that specific invoice.)

PAYMENTS

HF sends over payments at the same time that invoices are created, applying those payments to the target QB invoice as "non or undeposited funds." HF sends the check number (if applicable) to the appropriate QB field and marks each payment with its payment type (i.e. Cash, Check, Credit Card, Care Credit, etc…)

Subsequent payments for each invoice are sent over with future batch transfers and applied to the appropriate invoice automatically.

MODIFICATIONS

HF allows invoices to be modified after they have been created. If an insurance company's write offs force you to change the detail of an invoice, HF will automatically update the QB invoice with the new modified information. This is done in the same batch transfer where new invoices and payments are sent to QB.

LIMITATIONS

We call HF a 95 percent QuickBooks solution, because there are limits to the transfer process. Please keep in mind the following.

- QuickBooks does not allow us to create or modify invoices that total less than .01 (one cent)
- Product cost is not sent to QB
- Check Numbers longer than 8 digits are not accepted by QB
- Long middle names are not accepted by QB

Because we cannot create (or modify) an invoice where the total charge is less than a penny, some manual editing will occasionally be necessary.

An example of this is a *Return for Credit* where the total charge is changed to zero (or less.)

Another example: Often times you may want to give away some batteries, or provide a hearing evaluation at no charge. For tracking purposes, you may create an invoice for those types of events. Mark those invoices with the designation "Omit," preventing them from going to QB.

- Any invoice or individual payment can be prevented (omitted) from transferring to QB.

- Sales Tax is sent over as a line item called "Tax."

- Adjustments are sent over as a line item called "Adjustment."

The HF to QB batch process can be performed at any time. It's up to you when you batch transfer.

What versions of QuickBooks can I use?
Intuit allows HearForm to integrate with most of its QuickBooks products. Check the chart below to see if your version is supported.

	US	UK, Canada, Other*
Pro	2002…2013	2003…2013
Premier/Accountant	2002…2013	2003…2013
Enterprise	2002…2013	2003…2013

*Additional compatible versions of QuickBooks include Australia, New Zealand, Singapore and SE Asia.

Does HearForm's Link work with Windows Vista and Windows 7 & 8?
Yes, but your system may have a problem with QB2010-2013. User Account Control must be enabled to allow communication between FileMaker Pro and QuickBooks. For detailed information about QuickBooks compatibility with Windows Vista, please refer to
http://support.quickbooks.intuit.com/support/vista/.

How can HearForm's Link work for Macintosh users?
The Macintosh versions of QuickBooks, including the current version of Pro for Mac, do not offer an API that allows integration with external applications like the one available for Windows versions of QuickBooks. Until a better option is offered by Intuit, we recommend that you design your environment around at least one Windows computer (98 or above) running QuickBooks 2002 or above to allow integration with your FileMaker solution. A single windows-based computer running FileMaker, FileBooks Link and QuickBooks can be used to transfer all required data between FileMaker and QuickBooks. Once the data is available in your FileMaker solution, Macintosh users can access the information in FileMaker using FileMaker's built-in networking.

Do all users need HearForm's Link installed on their computer?
Yes. All users who want real-time access to QuickBooks from FileMaker Pro need FileBooks Link installed on their computer. Also see "How is FileBooks Link licensed?" below.

Do all users need QuickBooks installed on their computer?
No. Using Intuit's free Remote Data Sharing utility, HearForm's Link can communicate with a copy of QuickBooks running on a different computer. This feature allows users to access QuickBooks data without requiring a licensed copy of QuickBooks on each computer.