



01 Transaction Pro Importer 2.0

By Baystate Consulting, LLC.

“Our clients find this product quick and easy to use. The validation checks and exception report make it very easy for our clients to fix any issues with their import data.”

Matthew A. Fischer
Senior Systems Consultant
Bullhorn, Inc.

SUCCESS STORY

Bullhorn, Inc.

AT A GLANCE:

Customer:

Bullhorn, Inc.

Location:

Boston, MA

Industry:

Staffing and Recruiting Software

Business Challenge:

Bullhorn needed an automated way to create payroll checks and invoices in QuickBooks

Solution:

Bullhorn web based solution along with the 01 Transaction Pro Import Wizard 2.0 and QuickBooks

Results:

With the 01 Transaction Pro Import Wizard Bullhorn's clients have reduced the accounting overhead and increased cash flow by billing their clients in a more timely manner

Customer Profile

The typical Bullhorn client that also uses QuickBooks are staffing and recruiting firm that process anywhere from 20 to 1000 payroll checks and 15 to 700 invoices on a weekly basis.

Business Challenge

One of the parts of the Bullhorn system enables candidates in the field to enter their time card information via the web thus eliminating the paper time card process.

However, the staffing firms still needed to get this information into QuickBooks so that they could invoice the clients and process payroll. This manual entry was taking anywhere from 8 – 12 hours on a weekly basis.

Solution Overview

Initially Bullhorn was looking for an import tool that would work with the online edition of QuickBooks which is how they found Baystate Consulting's products. Currently our clients use both the desktop and online editions of the import wizard.

After testing the product we felt that it would be easy to use and would not involve any support due to the following features:

- wizard type interface
- pre import validation
- error messages that are easy to understand

The way the process works today is as follows:

- (1) Bullhorn clients ("the user") download a text file, the import file, from the Bullhorn website that contains the customer name, candidate name, payroll item and hours and save this file to their computer.





- (2) With both QuickBooks and the 01 Transaction Pro Import Wizard 2.0 ("TPI") open, the user selects the import file and chooses any settings that they would like to use.
- (3) After hitting the next button the user can review the data in a grid to ensure that this is the file that they want to import and hit the next button.
- (4) A mapping screen comes up which then allows the user to either map the QuickBooks fields to columns in the import file or type in a static value. Once they are comfortable with the mapping they hit the next button.
- (5) On the next screen the data comes up in a grid with how it will be imported so the user can confirm that they mapped the data correctly.
- (6) Once they are comfortable with the mapped data if they selected the setting to validate the data before the import TPI will check for data integrity before the import. If there are any data integrity issues this will allow the user to correct their import file before doing the import.
- (7) Once the import file passes the validation TPI will import the data into QuickBooks. If there are any transactions which TPI did not import they will appear on an exception report with the reason why.
- (8) All settings and the map are saved so the next time though the user just needs to review the data.

Business Benefits

Not only has this product reduced the number of accounting hours that Bullhorn's clients were spending on generating invoices and processing payroll but it has also improved the accuracy of the data.

In addition, Bullhorn client's cash flow has improved as they are able to generate invoices in a few minutes versus the hours it used to take.

Service and Support

As the product is very solid and straightforward to use Bullhorn's clients required little or no support. However, there is a very active support forum and any support questions have been answered promptly.

As Bullhorn began to use the product they discovered an additional feature that they would like to have added. This modification was completed in a few hours and was made available to all users.

"Customer service is A plus. A requested modification to the 01 Transaction Pro Import Wizard was made in hours."

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