BillQuick - Ask the Experts
Q. I need to know the correct way to enter deposits received from client and then allocate them later to open invoices.

A. This is called retainers in BillQuick and these retainers are recorded/deposited in the Payment screen by checking the “Apply as Retainer” box. There you have an option to receive this retainer either by Client or Project. Receiving it by client makes this retainer available to be used for any project of this client; receiving it by project means the retainer available can be specifically used on this particular project.

You do have an option to apply retainers later in the Billing Review or Manual Invoice screen prior to processing, or in the Payment screen after the invoice is processed using “Use Retainer” payment method.

Q. What is the best way to manage fixed price contracts billing? If you enter the invoice amount you want to bill, the hourly rate or the hours change to match the cost. I have to go to the job and mark time entries/expenses as billed and then create the invoices.

A. At the time of billing, BillQuick will make a recommendation as to how much you can bill based on approved billable time and expense entries for the billing period, which you can override by changing the Net Bill amount when billing your fixed fee projects. Changing the Net Bill amount will automatically trigger write up or write down in the back ground. Rest assured, this process does not change the originality of the hours, but it adjusts the write-up/down multiplier for these time entries.

Marking time/expense entries is a legacy feature, which you don’t need to follow anymore. You can make time and expense entries part of the invoice without changing the write-up/down. This is also called progress billing where time/expense can be tied with an already processed invoice at a later stage.

Q. What is the quickest way to apply a vendor bill to a project with a markup?

A. There is a markup field on the Vendor Bills screen, which is hidden by default. You can make the Markup field visible by adding it from the Field Chooser, located on the top left corner of the grid next to the Project ID column.

Q. I had a question about integration between BillQuick and MYOB. Any further developments in the pipeline?

A. Our product development team is always working towards adding more features and functionality in the software, and we are open to any suggestions that can make MYOB integration stronger. Please send your suggestions to bq-ideas@bqe.com.
Q. Once invoices are posted, they are not supposed to change. Why do some entries disappear from a posted invoice? We have already sent this question to BQE but have not had a response yet.

A. This can only happen if the time and expense entries are deleted after the invoice has been processed. It is highly recommended that all the users should log into BillQuick using their own login credentials instead of logging in as a Supervisor. These users should NOT have permissions to change billed time and expense entries. For Time Entry, it is permission in the Security screen “14. Allow Edit Billed Time Entry” and for Expense Log, it is permission “15. Allow Edit Billed Expense Entries”.

Q. I have been using BillQuick since a few months and biggest headache has been the unreliable integration of invoices into MYOB and the lack of information to help in identifying why an invoice fails to upload into MYOB.

A. Prior to sending invoices to MYOB, please do make sure all the Clients, Projects, Activities, and Expense Codes are sent to MYOB. Another area you may want to look into is the Sync Settings to make sure all account mapping for activity and expense codes is correct. Sometime what happens is that the item which is mapped to an income account in the Sync Settings no longer exists in MYOB or has been renamed to something else.

Q. Invoice number is not coming up in the body of the email when sending to clients. It is only showing {INVOICE NUMBER} rather than the actual number.

A. We do not have any open incidents about this being an issue on our standard invoices, which get shipped with BillQuick. Is this a custom invoice which was designed specifically for your company? Please email us a PDF file of that invoice with the issue highlighted and we will be happy to take a look at it. You can send it directly to me at Irfan@bqe.com.