BillQuick 101: Integrating BillQuick with QuickBooks

Webinar Questions and Answers

Question 1: **With real-time sync, can you select the items that you want to sync and exclude others?**

Answer: Yes, there is a setting in the Integration Settings screen that allows you to skip real-time sync for a certain module. For example, you may want to use real-time sync for all the data except for transferring time entries. Then, in that case you can check this setting for sending time entries.

Question 2: **Will the integration work if employees are traveling, and sending time and expenses remotely?**

Answer: Yes. If your employees are recording time and expenses using Web Suite or BillQuick Online, the data is eventually stored in your central database. As shown in the webinar, the person responsible for transferring data between the two applications needs to have a desktop version of BillQuick and QuickBooks installed on the workstation.

Question 3: **Is there the same type of class for integration with Peachtree or how does one find out the differences?**

Answer: They are almost same but there are some restrictions when it comes to integrating with Peachtree. We strictly follow the SDK (software development kit) provided by Peachtree and QuickBooks when developing the integration module. The more comprehensive an SDK is, smoother the integration becomes.

Question 4: **Why are 'On Demand' Send buttons and 'Real-Time Sync' not available for Peachtree?**

Answer: We haven't been able to implement these options for Peachtree integration due to some technology challenges. However, this still remains on our wish list.

Question 5: **What is the difference between Expenses and Vendor Bills?**

Answer: When you get 'Vendor Bills' you are strictly getting Vendor Bills from QuickBooks to BillQuick. Vendor Bills are not the only way of creating a payable in QuickBooks. There are Checks and Credit Card charges in addition to Vendor Bills that can be transferred from QuickBooks to BillQuick as a Job Expense.

Question 6: **Many of these sync settings require you to save after changing it and we learned the hard way that you have to save or add after every change - please write into the program that ANY CHANGE prompts you to save before you move on to the next item.**

Answer: We've already made this change in our latest release BillQuick 2012. Please check the version of BillQuick that you are using.

Question 7: **In QuickBooks there are only 'Bills' not 'Vendor Bills'. Explain again how BillQuick knows the difference?**

Answer: 'Bills' from QuickBooks are transferred into BillQuick as 'Vendor Bills'. Only the job-related line items on a bill are transferred into BillQuick.

Question 8: **We enter Vendor Bills in BillQuick now and sync each bill as it is entered to QuickBooks. These are billable sub-contractor type bills. All other bills are entered in QuickBooks first. Do we want to use the 'GET VENDOR BILLS' from QuickBooks to BillQuick? We sometimes get duplicate invoices. It doesn't seem consistent. Can't figure out what's happening.**

Answer: If there are no job-related expenses on the vendor bills that you enter in QuickBooks, there is no need to transfer them into BillQuick.

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Question 9: **Can BillQuick calculate vacation pay based on a %, e.g., employee earns vacation based on 4% of the hours they work?**

Answer: Currently this feature is not available in BillQuick. This will be added to the BillQuick Wish List. Please share other ideas by emailing them to BQE management at BQ-Ideas@bqe.com.

Question 10: **In Default Account settings, how is non-billable time treated if it has a project assigned to it?**

Answer: It's not clear whether you are referring to sending non-billable time entries to QuickBooks for a payroll purpose or sending non-billable time on an invoice. Contact BQE Customer Care at Support@bqe.com or (310) 602-4030 so that they can get more information from you in order to answer this question.

Question 11: **What information is not sent over or received in BillQuick/QuickBooks, e.g., last pay increase?**

Answer: Time entries are sent to QuickBooks only for one purpose, which is payroll. We feed your QuickBooks payroll with pure number of hours. You need to maintain your pay rates in QuickBooks under Payroll and Compensation in the Employee screen.

Question 12: **Can you choose what you want to sync on a schedule, e.g., only Clients and Projects?**

Answer: Scheduled sync will respect the sync settings. For example, if you've checked the option 'Do Not Get Clients' in the Integration Settings screen, then upon scheduled sync, clients will not be transferred.

Question 13: **When exactly is the Service Pack coming out?**

Answer: The Service Pack for BillQuick 2012 is scheduled for release in 2nd week of August.

Question 14: **We want to know how to do payroll charges in QuickBooks through hourly data that employees enter into their BillQuick web interface and then learn how hourly data in QuickBooks can be tied into pay rates so we can do proper payroll charges.**

Answer: Time entries are sent to QuickBooks only for one purpose, which is payroll. We feed your QuickBooks payroll with pure number of hours. You need to maintain your pay rates in QuickBooks under Payroll and Compensation in the Employee screen.

Question 15: **We want to see how your time records work with QuickBooks.**

Answer: Time entries are sent to QuickBooks only for one purpose, which is payroll. We feed your QuickBooks payroll with pure number of hours. You need to maintain your pay rates in QuickBooks under Payroll screen.

Question 16: **How do I set the Link column to show in my BillQuick (the symbol to show that BillQuick and QuickBooks are linked)?**

Answer: Link columns are almost available on each and every screen in BillQuick. If for some reason you are not able to see it on a particular screen, please add it by using the Field Chooser (a small icon in the top left corner of the grid or use the Edit menu).

Question 17: **So, Send means 'Send New' and 'Update Existing', right?**

Answer: Yes. Clicking on 'Send' transfers any new data and updates the already transferred data, if there are any changes.

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Question 18: **What if expenses are put on a credit card rather than checks? How can that be handled in BillQuick?**
Answer: We do transfer credit card charges when you click on Get from QuickBooks > Expense Log, as long as these credit card charges are associated with Jobs (projects).

Question 19: **My projects are moving over to QuickBooks as main projects?**
Answer: This seems to be an issue specific to your company. Please contact BQE Customer Care at Support@bqe.com or (310) 602-4030 to report this.

Question 20: **Is there an option to filter what can be synced on real-time or scheduled?**
Answer: Yes, there is a setting in Integration Settings screen that allows you to skip real-time sync for a certain module. For example, you may want to use real-time sync for all the data except for transferring time entries. Then, in that case, you can check this setting for sending time entries.

Question 21: **When I make a report for time entries synced and click show un-synced time entries only, nothing pops up. Is this a BillQuick glitch?**
Answer: This seems to be an issue specific to your company. Please contact BQE Customer Care at Support@bqe.com or (310) 602-4030 to report this.

Question 22: **Is there a way to send joint invoices to QuickBooks so that they transfer onto one invoice instead of several?**
Answer: Currently this is not possible. The challenge is if there are 4 projects on a joint invoice, which project are we going to tie it to? Should we decide to send it as one invoice instead? It's currently on our wish list and we are working to resolve this. Please share other ideas by emailing them to BQE management at BQ-Ideas@bqe.com.

Question 23: **Is real-time sync recommended as best practice or is it more typical to force the sync on a schedule?**
Answer: In order to be in control of what data gets transferred between the two applications, on-demand is the ideal way of syncing.

Question 24: **If we take the payments in QuickBooks how can we make sure that it goes to the correct payment in BillQuick customer invoice?**
Answer: Payments are always tied with the invoices. If the corresponding invoice is in BillQuick and the payment was received towards the invoice which is linked, then it will definitely link the right payment to the right invoice.

Question 25: **I see there is a button to click if you want to delete a record when it is deleted in BillQuick. So this will not happen if this button is not clicked?**
Answer: You are right. Without this setting checked in Global Settings and on the Integration menu, delete function is not going to work.

Question 26: **I am the only person with access to QuickBooks, if I set real-time sync, how does this work if other employees update a client address or project?**
Answer: Real-time sync is going to work only from your workstation unless you install QuickBooks on other employees' BillQuick workstations. QuickBooks just needs to be installed; they do not need to have access to your QuickBooks company file.

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Question 27: **How do you fix an error code when transmitting from BillQuick to QuickBooks that says service account is not valid?**

Answer: You can fix this by making sure the account assigned to the item in the Integration Settings screen still exists in QuickBooks. Also you may want to check whether the same account is assigned in Integration Settings and QuickBooks for the item list. Sometimes the account is changed in QuickBooks by your accountant but that update is not carried out in the Sync Settings in BillQuick. In that case there will be an error as there is a mismatch of accounts on the same item in BillQuick and QuickBooks.

Question 28: **Can we use this with QuickBooks Online?**

Answer: No. The integration is currently available with QuickBooks desktop edition only.

Question 29: **What is the best way to enter employee expenses in BillQuick and sync to QuickBooks for payment, e.g., enter under employee name or vendor name in BillQuick?**

Answer: Entering Employee expenses in BillQuick is a best practice. You can send these expenses to QuickBooks as Vendor Bills form the Expense Log screen.

Question 30: **Are credit memos imported into BillQuick from QuickBooks the same way that payments are for A/R and A/P?**

Answer: Credit memos are transferred into BillQuick as negative invoices.

Question 31: **Can you specify the time that the automatic sync occurs? Or is it just a reminder for us to manually sync everything?**

Answer: Currently we do not have a time setting for a scheduled sync. This will be added to the BillQuick Wish List. Please share other ideas by emailing them to BQE management at BQ-Ideas@bqe.com.
