

BillQuick Outlook Add-In Help Manual 2017

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WELCOME

BillQuick® Outlook Add-In 2017 is a powerful add-in module for BillQuick, the most flexible time billing, project management and accounting software available on the market. BillQuick Outlook Add-In allows BillQuick users to easily convert their Microsoft® Outlook appointments, tasks, contacts and emails into time records and other BillQuick data.



If you use Microsoft Outlook Calendar to keep track of your appointments, you will find BillQuick Outlook Add-In extremely flexible and useful to work with. It makes time entry into BillQuick as simple as a mouse-click and also associates an appointment to a project and activity using a complex set of rules, and saves them in the BillQuick database. With this BillQuick Outlook Add-In you can record the time used to read or write your emails and save that detail as a time entry in BillQuick. You can send emails from your Outlook Inbox or Send folders to BillQuick as time entries.

If you are new to BillQuick Outlook Add-In and want to understand this product, you can check out its [Key Features](#). You might also want to go through its [Getting Started Guide](#) or download the [BillQuick Outlook Add-In Help Manual](#).

 Your feedback helps us plan and improve BillQuick Outlook Add-In releases and associated documentation. Please email your comments, suggestions and ideas about BillQuick Outlook Add-In and this Help to BQ-Ideas@bqe.com.

INTRODUCTION

SYSTEM REQUIREMENTS

Please check out the BillQuick Outlook Add-In [Getting Started Guide](#) for installation and startup information. You can also visit the [website](#) for the system requirements.

BILLQUICK OUTLOOK ADD-IN OVERVIEW

BillQuick Outlook Add-In is a useful module that integrates directly within Microsoft Outlook. With this program, you can easily convert Outlook appointments, tasks, contacts and emails into time records and other BillQuick data. In addition, you can quickly complete a time card by turning any Outlook task into a project time entry.

The BillQuick Outlook Add-In module is centered on four main features:

Appointments

BillQuick Outlook Add-In enables users to convert appointments to time entries in BillQuick. Appointments are easily associated with the BillQuick projects and activities. With this feature you can keep track of appointments in Outlook Calendar and easily convert them into time entries.

Tasks

A task is a personal or work-related errand or activity that you want to track through completion. Tasks can occur once or repeatedly (recurring) at regular intervals. A task can be anything from reporting to the manager every week to solving customer issues. Such events and the frequency of their occurrence can easily be tracked with Outlook tasks and sent to BillQuick as time entries. You can make time entries for any date you choose, irrespective of the time period of the tasks.

Emails

Emails from your Outlook Inbox and Sent folders can be logged into BillQuick just like appointments and tasks. The time you spend on reading or writing an email gets stored as a time entry in the BillQuick database. By default, 15 minutes are saved; however, the duration time can be edited prior to sending information to BillQuick. Any email in Outlook (Inbox or Sent folder) can be sent to BillQuick by selecting it and then choosing the *Send To BillQuick* options from the menu bar or the shortcut menu.

New email messages can also be sent to BillQuick. When a new email is composed in Outlook, BillQuick menu gets added to its menu bar. The options in the BillQuick menu allow users to send new emails and simultaneously log them as time entries in BillQuick. These options get enabled only after a user logs in to BillQuick.

Contacts

The BillQuick Outlook Add-In can be used to create Outlook contacts and it allows you to send these contacts directly to BillQuick. Contacts can be sent as Employee, Client, Client Contact and Vendor.

FEATURES

Key Features

- Installs in your desktop copy of Microsoft Outlook
- Converts Outlook appointments, tasks, emails and contacts to BillQuick data
- Real-time update of hours from any Outlook appointment
- Allows time entry review and adjustment before sending to BillQuick
- Enables approval of time entry before sending to BillQuick
- Provides convenient 'Send to BillQuick' top menu and shortcut menu

CONTACT INFO

BQE Software, Inc. is a California based C Corporation, founded in 1995. It first introduced its flagship product, BillQuick, in May 1996 and since then BQE has developed a host of programs and solutions for your specific needs.

You can contact us for information about the latest products and services, ordering products, training and consulting, technical support, report customization or any other business query.

Corporate Office

Address:	BQE Software 3825 Del Amo Blvd. Torrance, CA 90503 USA
Telephone:	+1 (310) 602-4010
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Website:	www.bqe.com
BQE Blog:	blog.bqe.com
User Forum:	BillQuick Yahoo Group
Services:	www.bqe.com/Services

Sales

Contact our sales representative for information about the latest products and services.

Telephone:	1 (855) 237-1238 (Within USA) +1 310-602-4020 (Outside USA)
Website:	www.bqe.com
Email:	sales@bqe.com

Technical Support

For technical support, you can contact our Support Team. Before you call, email or fax us, please provide the following information for the fastest possible service:

- Product serial number (registration number)
- Your name, company name and phone number
- Exact product name and version number (To find the version of BillQuick, click Help, About BillQuick)
- Type of operating system (for example, Windows XP)
- Complete description of the issue, including steps to reproduce it
- Exact wording of any messages displayed when you encountered the problem
- Steps taken to resolve the problem
- All previous email threads with BQE Software about the issue, if any

Telephone:	+1 (310) 602-4030
Knowledge Base:	kb.bqe.com
Email:	support@bqe.com
Website:	www.bqe.com/Support
Hours:	7 AM to 3 PM Pacific Standard Time

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Website:	www.bqe.com.au
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Support Hours:	Monday to Friday 8:30 AM to 5:30 PM Australian Eastern Standard Time

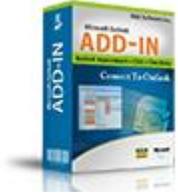
Europe Office

Address:	BQE Software Crosshaven Co. Cork Ireland
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Website:	www.bqe.co.uk
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START-UP

WELCOME

BillQuick® Outlook Add-In 2017 is a powerful add-in module for BillQuick, the most flexible time billing, project management and accounting software available on the market. BillQuick Outlook Add-In allows BillQuick users to easily convert their Microsoft® Outlook appointments, tasks, contacts and emails into time records and other BillQuick data.



If you use Microsoft Outlook Calendar to keep track of your appointments, you will find BillQuick Outlook Add-In extremely flexible and useful to work with. It makes time entry into BillQuick as simple as a mouse-click and also associates an appointment to a project and activity using a complex set of rules, and saves them in the BillQuick database. With this BillQuick Outlook Add-In you can record the time used to read or write your emails and save that detail as a time entry in BillQuick. You can send emails from your Outlook Inbox or Send folders to BillQuick as time entries.

If you are new to BillQuick Outlook Add-In and want to understand this product, you can check out its [Key Features](#). You might also want to go through its [Getting Started Guide](#) or download the [BillQuick Outlook Add-In Help Manual](#).

 Your feedback helps us plan and improve BillQuick Outlook Add-In releases and associated documentation. Please email your comments, suggestions and ideas about BillQuick Outlook Add-In and this Help to BQ-Ideas@bqe.com.

INSTALLATION

BillQuick Outlook Add-In can be installed on a single-user system or a networking environment. It also operates in a network environment, both peer-to-peer and client-server networks. In either scenario, the database is located in a folder on a personal computer or shared drive.

 See the [BillQuick Outlook Add-In Getting Started Guide](#) for detailed installation instructions.

PRODUCT ACTIVATION

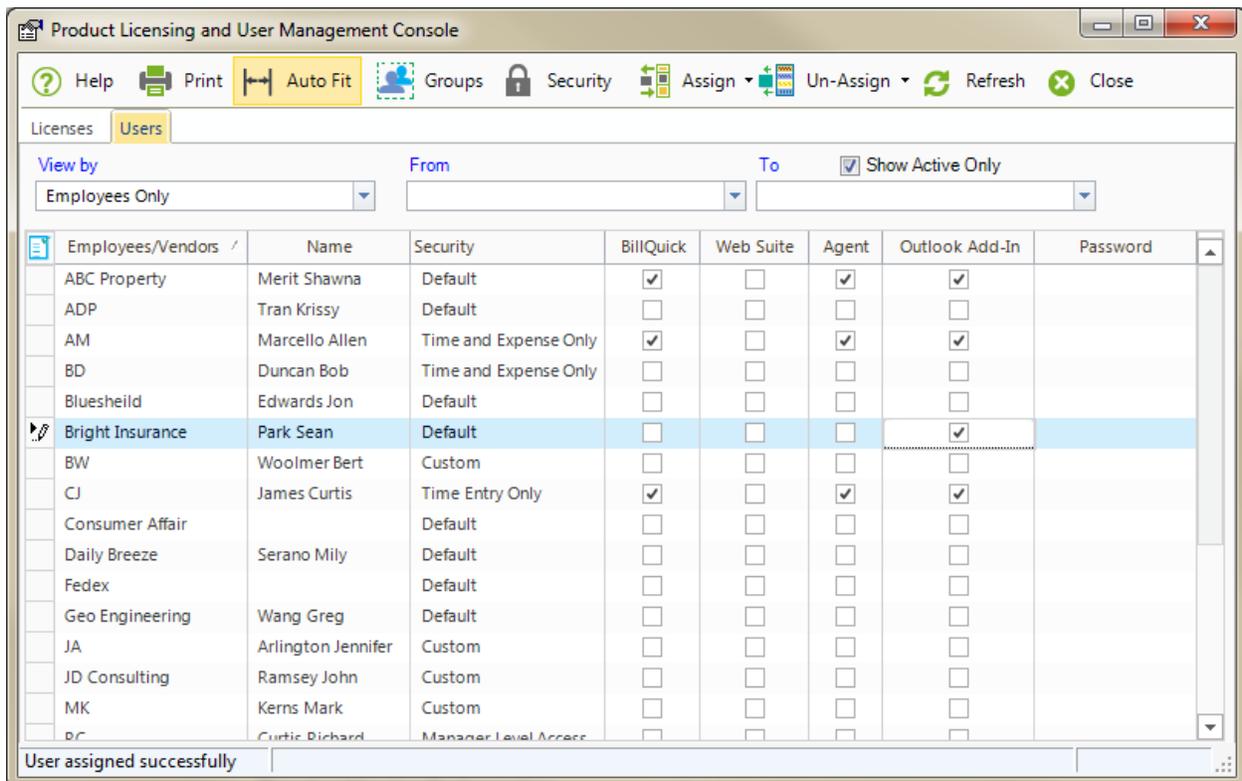
When you start BillQuick Outlook Add-In and it is either not yet activated or in the evaluation mode, the Product Activation screen displays. See the [BillQuick Outlook Add-In Getting Started Guide](#) for more information.

Licensing and User Management

PRODUCT LICENSING & USER MANAGEMENT OVERVIEW

BillQuick Outlook Add-In offers various options for licensing and registering your copy of the software. You can use the [Product Activation](#) or Product Licensing & User Management screen to do that.

The Product Licensing and User Management Console allows you to manage the licensing and user authorization of BQE products and add-ons. The purpose of this screen is to provide a common platform for all the BQE Software products from where authorized people can assign/un-assign users and obtain other licensing information. This screen is accessible from BillQuick and its add-ons. It has two tabs: [Licenses](#) and [Users](#).



The screenshot shows the 'Product Licensing and User Management Console' window. The 'Users' tab is active. The interface includes a toolbar with options like Help, Print, Auto Fit, Groups, Security, Assign, Un-Assign, Refresh, and Close. Below the toolbar, there are filters for 'View by' (Employees Only), 'From', 'To', and 'Show Active Only'. A table lists users with columns for Employees/Vendors, Name, Security, BillQuick, Web Suite, Agent, Outlook Add-In, and Password. The 'Bright Insurance' user is highlighted.

Employees/Vendors	Name	Security	BillQuick	Web Suite	Agent	Outlook Add-In	Password
ABC Property	Merit Shawna	Default	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
ADP	Tran Krissy	Default	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
AM	Marcello Allen	Time and Expense Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
BD	Duncan Bob	Time and Expense Only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Blueshield	Edwards Jon	Default	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Bright Insurance	Park Sean	Default	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
BW	Woolmer Bert	Custom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
CJ	James Curtis	Time Entry Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Consumer Affair		Default	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Daily Breeze	Serano Mily	Default	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Fedex		Default	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Geo Engineering	Wang Greg	Default	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
JA	Arlington Jennifer	Custom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
JD Consulting	Ramsey John	Custom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
MK	Kerns Mark	Custom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
PC	Curtis Richard	Manager Level Access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

User assigned successfully

You must purchase a license key and install it using any of these screens. BillQuick Outlook Add-In License Key is based on your company name, hence, if you change your company name or the number of authorized users, a new license key must be obtained. Registration is based on product code and to be done once per user.



Refer to the [BillQuick Outlook Add-In Getting Started Guide](#) for related procedures and details.

Reference Info

PRODUCT LICENSING AND USER MANAGEMENT–LICENSES TAB

The following are descriptions of fields on the Product Licensing and User Management Console–Licenses screen:

Product:

Lists the various software products for which licenses can be assigned to users. The list consists of BillQuick and its add-ons like Agent, Web Suite, etc.

License Key:

Encrypted sequence that uniquely identifies your company and authorized user count. The BillQuick or any other product license key is based on your company name. If you have purchased a license, you need to enter the licensed company name in the Company screen prior to entering the license key here. License keys are stored in the database. If the company name is changed after the database is licensed, the result will be an unlicensed program.

Users:

The total number of licenses purchased for a BQE Software product. It displays after you enter the license key. Additional licenses can be purchased at any time, which increases this number.

Users = Assigned + Available

In Use:

The number of licensed users that are logged in to a program simultaneously. Thus, it equals the currently logged in users for a program.

Assigned:

The number of unique login IDs and simultaneous users allowed in the program. It depends on the number of licenses purchased for your software.

Assigned = Users - Available

Available:

The number of licenses remaining or still available for a software product. The available number of users can be assigned to the desired employees and vendors.

Available = Users - Assigned

 To obtain your license key, contact us at 888-245-5669 or email Sales@bqe.com or fax (310) 784-8428.

PRODUCT LICENSING AND USER MANAGEMENT-USERS TAB

The following are descriptions of fields on the Product Licensing and User Management–Users screen:

View By:

You can choose the desired view mode by employees, vendors or their groups. For example, if you choose Employees Only, only employees will display in the grid and hence those can be authorized to use any licensed program. Similarly, if you choose a group, then members of that group will be available for assignment as authorized users of a program.

From-To:

Depending on what is selected in the View By field, employees, vendors or their groups can be selected from these drop-down lists. You can select a single ID or a range of IDs in the From-To fields.

Show Active Only:

Select this option if you want to display only active employees and vendors in the grid. Cleared, the inactive employees and vendors will also display but will be unavailable.

Grid**Field Chooser:**

Click to open the Field Chooser to hide or show columns in the grid. Select the field names you want to show in the grid. You can also drag-and-drop fields between the Field Chooser and the grid. Whether or not fields are hidden, values are recorded to them when data is entered. By default, some of the fields are already selected and displayed in the grid. Clear them if you want to hide them in the grid. The column names in the Field Chooser are listed in alphabetical order.

Employees/Vendors:

Displays a list of employees or vendors, depending on your View By mode and From To range. The desired employees or vendors can be assigned as authorized users of the listed program. Only assigned users can log into a program.

Name:

Displays the name of the employee or vendor. It uses the Last Name/First Name format.

Security:

Displays the pre-defined security profiles assigned to the employee or vendor. However, you can change it here by selecting another profile from the drop-down list.

BillQuick, Web Suite, Agent and Outlook Add-In:

This is the list of available programs–BillQuick and its add-ons. You can assign or un-assign users for all these programs by selecting the relevant boxes. You can also assign or un-assign all the available users for a program using the Assign or Unassign buttons.

Password:

You have the ability to change passwords of employees and vendors by entering a new one here. When you enter or change any password, BillQuick prompts you to verify it by re-typing it in the Confirm Password dialog box.

How Do I**HOW DO I ASSIGN USERS?**

To assign users to BillQuick® Outlook Add-In:

1. In BillQuick, select File menu > Licensing & User Management. The Product Licensing and User Management screen displays.
2. Click the Users tab.

3. If your firm has a larger number of users, use the available filters (for example, View By and From/To drop-down list).
4. In the grid, select the check box in the desired product column (for example, Outlook Add-In) for the relevant users to authorize them to access the program.

HOW DO I LICENCE OUTLOOK ADD-IN?

One way to license the BillQuick Outlook Add-In software is via the Product Licensing & User Management screen:

1. In BillQuick, select File menu, Licensing and User Management.
2. On the Licenses tab, enter your License Key for BillQuick Outlook Add-In exactly as it is provided in the email instructions received from BQE.
3. Click Update. The number of authorized users and other relevant information displays.
4. When you have finished, click Close.



If you have any questions or issues with the licensing, contact [BillQuick Support](#).

HOW DO I MANAGE LICENSING?

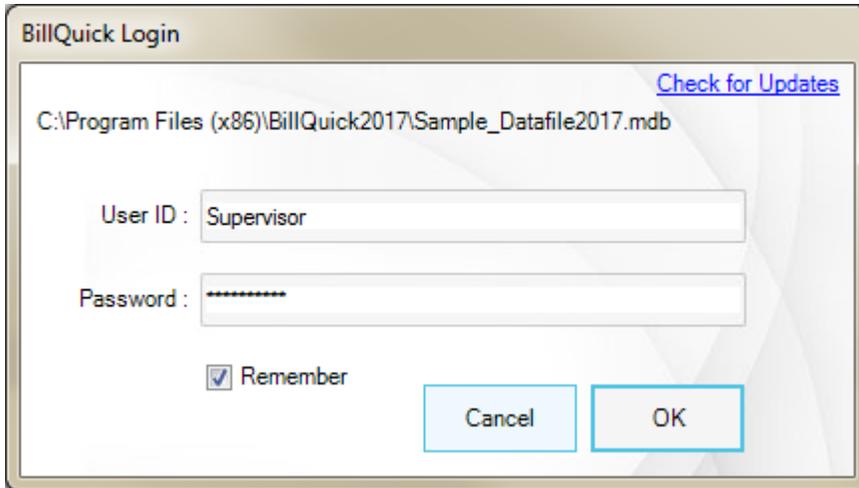
Do the following to manage your BillQuick Outlook Add-In licenses:

1. In BillQuick, select File menu > Licensing & User Management. The Product Licensing and User Management screen displays.
2. Click the Licenses tab. The license keys for your currently purchased products display in addition to details on how the product licenses have been assigned.
3. To add or edit a BillQuick Outlook Add-In license key, click in its License Key column. Enter the key exactly as specified in your license and registration email.
4. On the button panel, click Update. The task is complete!

BILLQUICK LOGIN

You need to log in to BillQuick from Microsoft Outlook to use the BillQuick Outlook Add-In program. You can always log in with the default User ID, *supervisor*, whose default password is also *supervisor*. Select the *Remember* check box to have BillQuick Outlook Add-In remember your User ID.

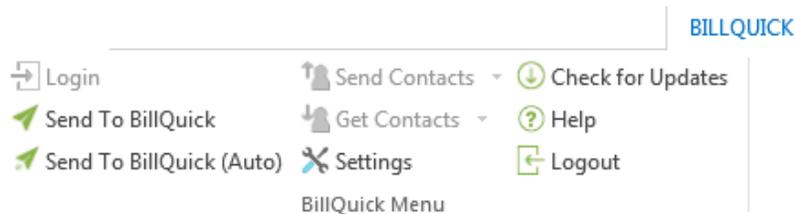
Both User ID and Passwords can be changed like all other login passwords in the *Security* section of BillQuick.



 Click the **Check for Updates** link to verify if you are using the most current version of BillQuick Outlook Add-In.

BILLQUICK MENU

The following information describes the options available on the BillQuick Outlook Add-In menu.



Login:

Select this menu option to login and use BillQuick Outlook Add-In.

Send to BillQuick:

Select this option to send a selected appointment, task or email to BillQuick.

Send to BillQuick (Auto):

Select this option to quickly create a time entry in BillQuick for a selected appointment, task or email to BillQuick using values (for example, Project ID, Emp ID, Activity ID, etc.) entered from a previous [Send to BillQuick](#) process. You will only be prompted for information if the fields are empty.

Settings:

Select this option to set your preferences on how BillQuick Outlook Add-In should transfer your Outlook data into BillQuick.

Send Contacts:

Choose one of the sub-selections from this menu option to specify the type of record to be created in BillQuick for a selected Outlook contact (that is, Employee, Vendor, Client or

Client Contact). You can see the Send Contacts option only when Contacts are selected in Microsoft® Outlook.

Get Contacts:

Choose one of the sub-selections from this menu to specify the type of BillQuick contact to be transferred to Outlook (that is, Employee, Vendor, Client or Client Contact).



The Send or Get Contacts options only display when Outlook Contacts view is active.

Check for Updates:

Select this option to check for the latest version of BillQuick Outlook Add-In. If there is a new update to download, BillQuick Outlook Add-In prompts you to download it.

Help:

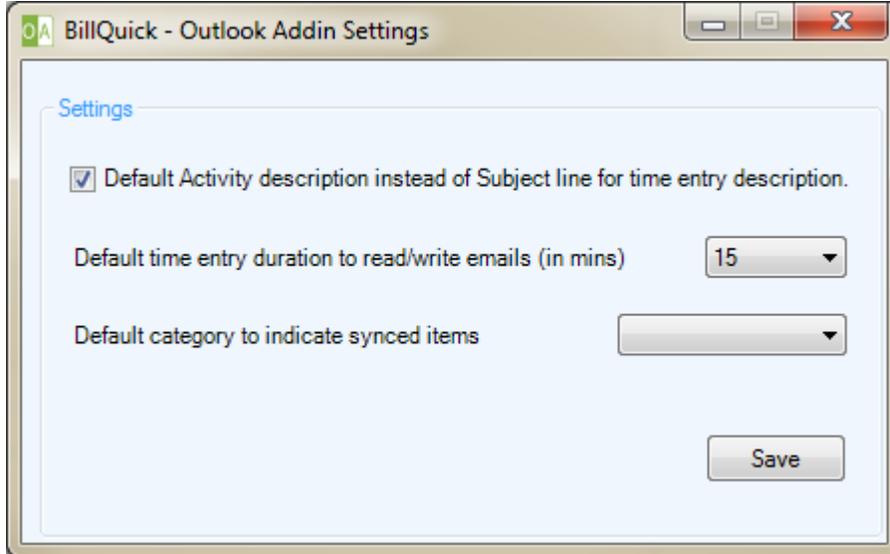
Select this option to display the BillQuick Outlook Add-In Help.

Logout:

Select this menu option to log out of BillQuick Outlook Add-In.

BILLQUICK—OUTLOOK ADD-IN SETTINGS

The BillQuick—Outlook Add-In Settings screen allows you to set your preferences on how BillQuick Outlook Add-In should transfer your Outlook data to BillQuick.



Default Activity description. . .

Select this check box to have BillQuick Outlook Add-In use the activity description in BillQuick instead of the *Subject* line when transferring a selected item (for example, appointment or email) as time entry in BillQuick.

Default time to read and. . .

You can specify the default time entry duration for reading and writing emails from this drop-down list. You can choose from 15, 30, 45 and 60 minutes duration. This value

displays in the *Duration* field of the [Send. . .to BillQuick](#) window that displays during the send process and can be edited.

Default category to indicate synced items:

This option helps you to select a color that is assigned to a category, say appointments, tasks, emails and contacts when sending them to BillQuick. It helps you to quickly identify the items already sent to BillQuick. You can select a color from the available category list and save that from the Settings screen. By default, the BillQuick Outlook Add-In adds a new color category named 'BillQuick Time' and saves it as the default color category to indicate the synced items.

Save:

Click to save your settings and close the screen.

SEND TO BILLQUICK

SEND TO BILLQUICK OVERVIEW

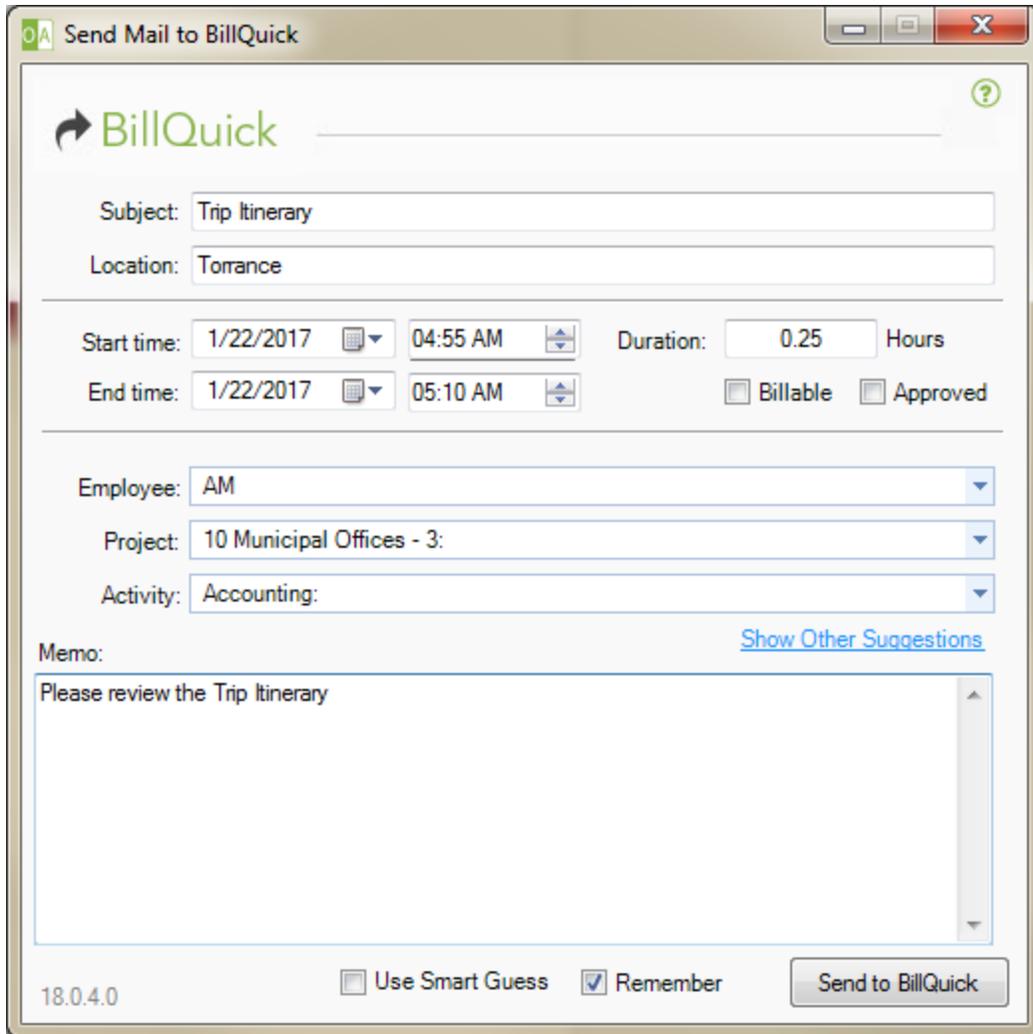
The 'Send to BillQuick' option is the core function of the BillQuick Outlook Add-In tool. This feature is used to send appointments, tasks and emails to BillQuick as time entries. When used, you can enter descriptive detail, edit the time and duration of an activity; and flag the item as billable, approved or both.

You can also select the employee, project and activity with which to associate the selected item. The *Send to BillQuick* option can be selected from the main Outlook menu or the pop-up menu that displays when you right-click on a selected item (for example, appointment, email, etc.).

Reference Info

SEND TO BILLQUICK

The following information describes the options available on the 'Send to BillQuick' screens that display when the *Send to BillQuick* option is selected for an appointment, task or email. With this screen users can edit the details for a selected item (that is, Employee, Project and Activity) before sending it to BillQuick. You can also send Outlook contacts to BillQuick as employees, clients, etc.



Subject:

The subject is automatically filled in when an email or appointment is selected in Outlook. The *Subject* is used as the description for the time entry created in BillQuick for the selected email or appointment.

Location:

The location is automatically filled in when an appointment is selected in Outlook Calendar view. It can be a room number or location of the appointment.

Start Date/Time:

This field displays the start date and start time for the selected item.

End Date/Time:

This field displays the end date and end time for a selected activity.

Duration:

This field displays the duration (in hours) of the activity selected to send to BillQuick. This field gives the billing hours for your time entry.

 The default time entry duration time (for example, 15min, 30min, etc.) for reading and writing emails is specified in [Settings](#).

Billable:

Select this check box to indicate the time entry as billable. The status will display in the BillQuick Time Entry screen after the information is sent.

Approved:

Select this check box to make the time entry available for invoicing in BillQuick. Otherwise, the time entry will need to be approved for invoicing in BillQuick.

Employee:

From the drop-down list, select a BillQuick Employee or vendor with whom to associate this time entry.

Project:

You can associate your appointment to any BillQuick Project. Either type or select from the drop-down list the Project ID that you want to associate with the appointment. If you don't remember the ID, look at the descriptions in the drop-down list for the one that matches your project.

 If your project doesn't match any existing projects, you can make a new project in BillQuick.

Show Memo/Show Other Suggestions:

This link toggles between the *Memo* field and the *Smart Guess List*.

Activity:

You can associate a selected item (for example, email, task or appointment) to any BillQuick Activity. Either type or select from the drop-down list the Activity ID for the item. If you don't remember the ID, look at the descriptions in the drop-down list for the one that matches your task.

Memo:

Enter a memo in this field for the selected item. The entered comments are transferred as a time entry memo in BillQuick.

 You can use Windows' cut/copy/paste features in this textbox using the shortcut menu.

Smart Guess List:

This grid displays a list of frequently selected Projects and Activities when the *Use Smart Guess* check box is selected.

Use Smart Guess:

Select this check box to have BillQuick Outlook Add-In use *Smart Guess* technology to make the Send to BillQuick process faster. With this technology, BillQuick Outlook Add-In can associate a task, appointment or email to BillQuick data fields like project, employee and activity using a complex set of rules based on your previous time records. The program will remember the last 3 matches of activity, project and employee.

Remember:

Select this check box to remember your settings for future use.

Send to BillQuick:

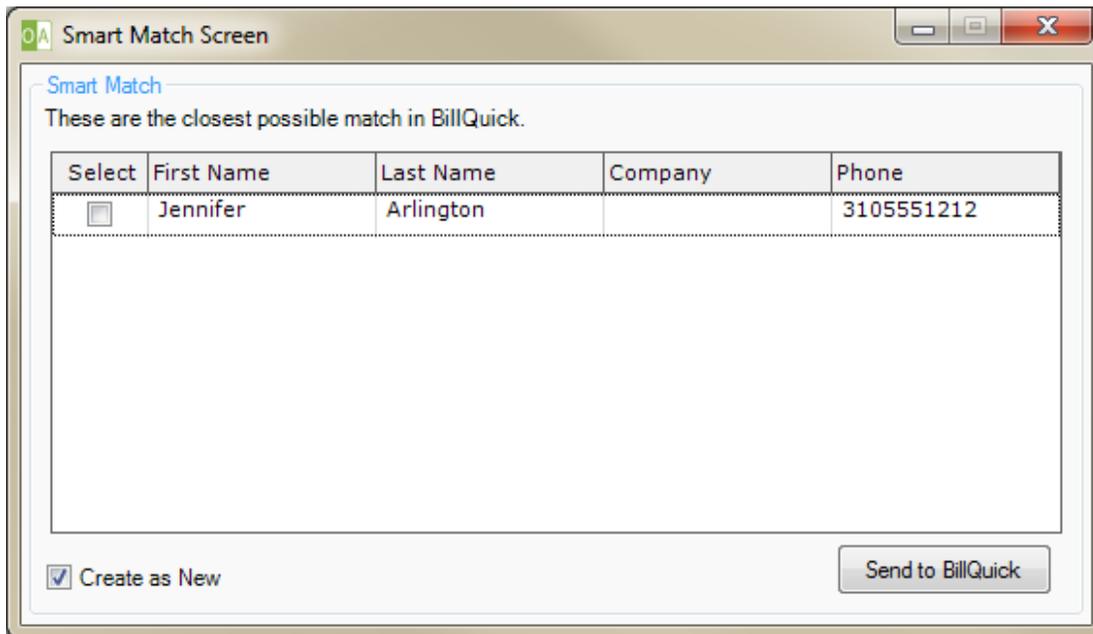
Click to send the selected item to the BillQuick database.

 By default, the logged in BillQuick database gets synced with the BillQuick Outlook Add-In at the time of login.

SMART MATCH

BillQuick Outlook Add-In allows you to send contacts to BillQuick as employees, clients, client contacts and vendors.

If a contact with the same name, phone number or company exists in BillQuick, Outlook Add-In prompts you with the Smart Match screen. It gives you the option to either merge the Outlook contact record with an existing BillQuick record or create a new record.



Grid

This grid displays a list of BillQuick contacts that closely match the record you are attempting to send. To merge an Outlook contact with a listed record, select the check box in the *Select* column.

The criteria used for selecting possible matches is as follows:

- **Employees/Vendors:** Smart Match compares the first and last names of the contact and Employee. It compares the contact's telephone numbers (that is, Home, Primary, Mobile and Business) with the Employee's Phone field. If any of these three fields matches the data for an employee in BillQuick, that employee's information is displayed in the Smart match grid.

- **Client:** Smart match compares the First and Last names of the Outlook contact with the Client's. It compares the contact phone number (that is, Home, Primary, Mobile and Business) with the Client's Phone field in BillQuick. In addition, the contact Company Name with Client Company are compared.

 The Contact phone numbers are compared in the following order to the BillQuick Client record: Business, Mobile, Primary and Home.

- **Client Contact:** Smart Match compares the First and Last names of the Outlook contact with the Client Contact, contact telephone number (that is, Home, Primary, Mobile and Business) with Client Contact's Phone field and contact Company Name with Client Contact Company.

 The telephone numbers are compared in the same order as with the client record.

Create as New:

Select this check box to create a new record in BillQuick based on the selected Outlook contact.

Send to BillQuick:

Click this button to send the Outlook contact information to BillQuick.

How Do I

HOW DO I SEND APPOINTMENTS?

BillQuick Outlook Add-In enables you to send an appointment to BillQuick. Do the following to send appointments to BillQuick:

1. Prior to sending an appointment to BillQuick, we recommend that you review it first. Edit the appointment in Outlook if necessary to make sure it is correct before beginning the *Send* process.

 You need to open a single occurrence of a recurring appointment series.

2. Select the appointment in the *Calendar* view.
3. Select BillQuick menu, Send to BillQuick.

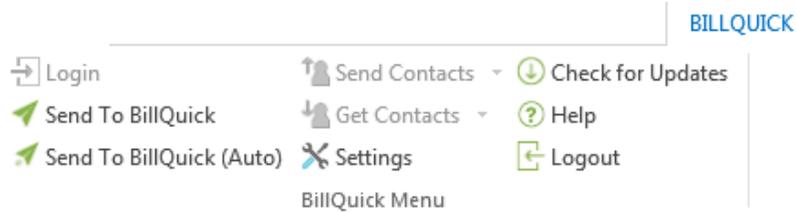
 You can also right-click the appointment and select **Send to BillQuick** from the menu or double-click the appointment and select Add-Ins, BillQuick, Send to BillQuick on the Appointments screen.

4. Enter the **Date, Project ID, Employee ID** and **Activity ID**.
5. Type the memo that you want to add to the time entry in the **Memo** field.
6. Click **Send to BillQuick** to save the selected appointment as a time entry in BillQuick.

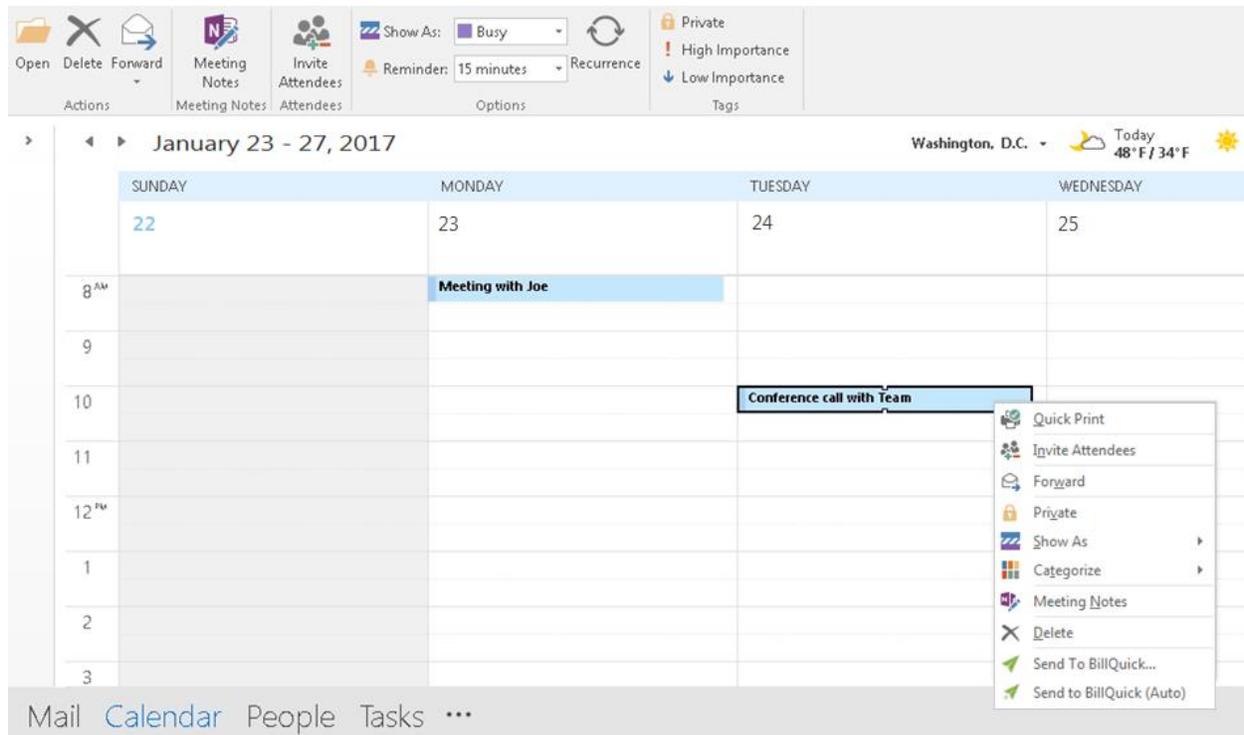
HOW DO I SEND TASKS?

BillQuick Outlook Add-In enables you to send tasks to BillQuick. Do the following to send a task to BillQuick:

1. Prior to sending a task to BillQuick, we recommend that you review it first. Edit the task in Outlook if necessary to make sure it is correct before beginning the *Send* process.
2. In Tasks view, select the task.
3. Select the BillQuick menu, Send to BillQuick.



 You can also right-click the task and select **Send to BillQuick** from the shortcut menu or double-click the task and select Add-Ins, BillQuick, Send to BillQuick on the Tasks screen.



4. Enter the **Date, Project ID, Employee ID** and **Activity ID**.
5. Type the memo that you want to add to the time entry in the **Memo** field.
6. Click **Send to BillQuick** to save the selected task as time entry in BillQuick.

HOW DO I SEND EMAILS?

With BillQuick Outlook Add-In, you can send emails to BillQuick as time entries. You can send existing emails (that is, sent and received) and log new emails as time entries in BillQuick at the same time you send them to recipients.

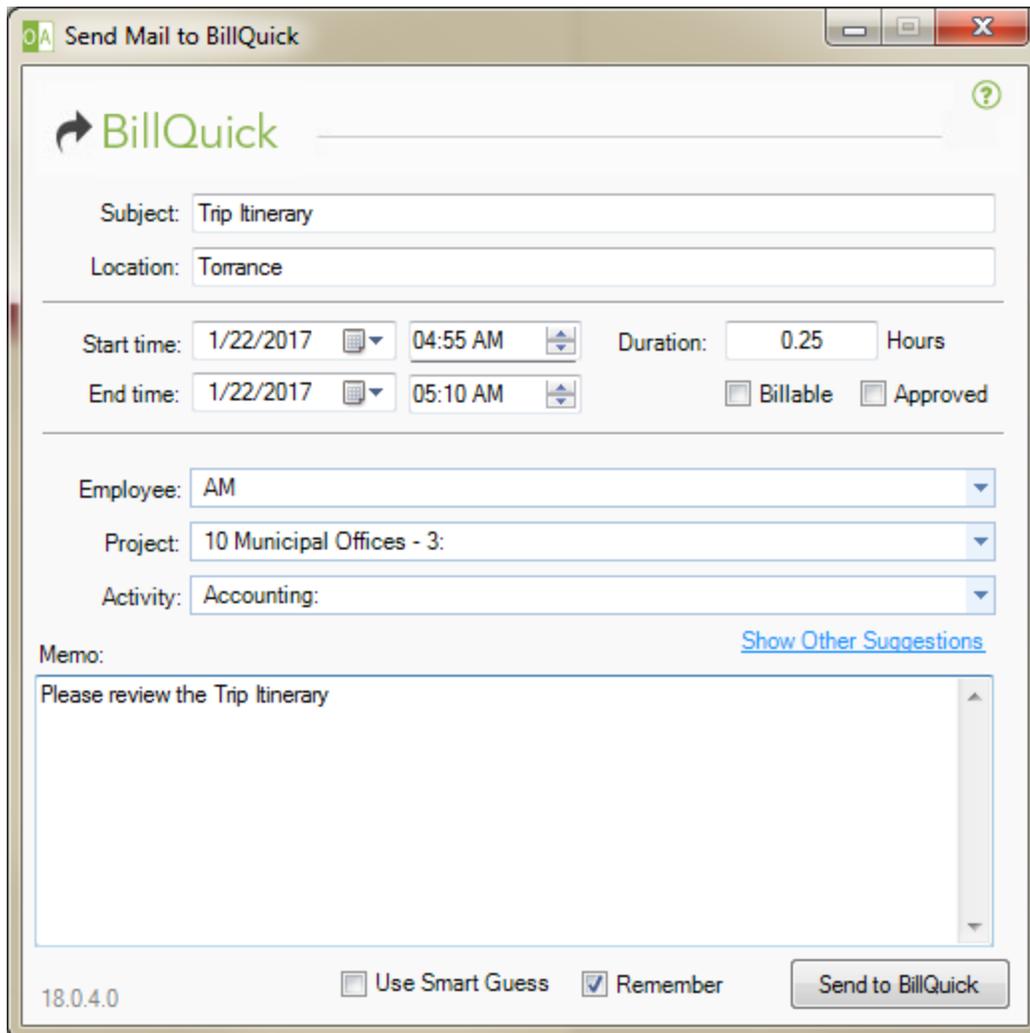
Send an Existing Email

Do the following to send an existing email:

1. Prior to sending an email to BillQuick, we recommend that you review it first in Outlook to make sure it is correct.

 Make sure the email *Subject* line is correct. It gets transferred as the time entry description in BillQuick.

2. In the Outlook *Inbox* or *Sent* folder, select an email to send.
3. Select BillQuick menu, Send to BillQuick.



 You can also right-click the email and select **Send to BillQuick** from the menu or double-click the email and select Add-Ins, BillQuick, Send to BillQuick on the Email screen.

4. Enter the **Date**, **Project ID**, **Employee ID** and **Activity ID**.
5. Type the memo that you want to add to the time entry in the **Memo** field.
6. Click **Send to BillQuick**.

Create and Send New Email to BillQuick

You can create an email and simultaneously send it to the recipients and BillQuick by using the *Send and Log* feature.

When Send and Log is used, BillQuick Outlook Add-In sends the same time entry values (for example, Project ID, Employee ID, and Activity ID) sent the last time the [Send to BillQuick](#) screen was used with the *Remember* check box selected. If this option was not used or the fields were blank, you will be prompted to enter the values.

Do the following to create an email and log it in BillQuick as a time entry:

1. Create an email in Outlook.



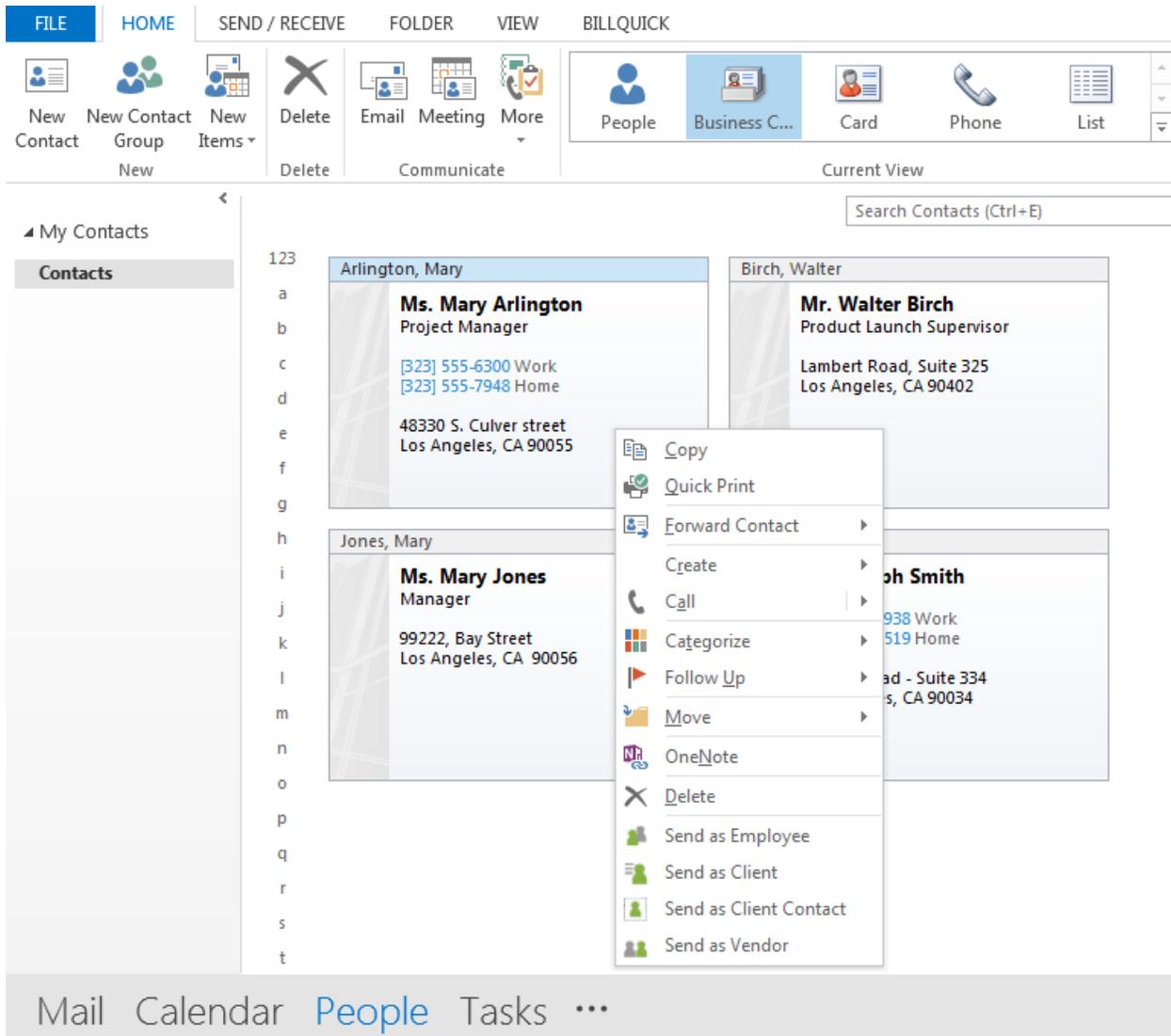
Make sure the email Subject line is correct. It gets transferred as the time entry Description in BillQuick.

2. Select Add-Ins, BillQuick, Send and Log from the *Message* screen.
3. Click **OK** on the confirmation message.

HOW DO I SEND CONTACTS?

Do the following to send a contact to BillQuick from Microsoft Outlook:

1. In Outlook Contacts view, right-click a contact record to send to BillQuick.
2. You can also double-click it and open its screen.
3. On the BillQuick shortcut menu (or Add-Ins tab), choose how you would want to save the contact's information in BillQuick (that is, Employee, Vendor, Client or Client Contact).



 If the contact information was previously sent to BillQuick, you are prompted to update the existing data.

If a contact with the same name is already present in BillQuick, you are prompted with the [Smart Match screen](#). You can choose to create a new BillQuick contact or merge this information with an existing contact.

If you select *Client Contacts*, you are prompted to select the client to whom you want to associate the client contact. If another client record exists in BillQuick that is similar to the contact you are sending, the Smart Match screen displays. Make sure the **Create as New** check box is selected. If it is not, BillQuick Outlook Add-In will merge your selected Outlook Contact with the record listed in the Smart Match screen.

4. Click **OK** on the confirmation message.

GET FROM BILLQUICK

GET FROM BILLQUICK OVERVIEW

Besides sending information to BillQuick, you can also retrieve data from BillQuick. BillQuick Outlook Add-In can be used to create Microsoft Outlook contacts from BillQuick employee, client, client contact and vendor records. After you choose the type of records that you want to get into Outlook as contacts, BillQuick Outlook Add-In displays a window listing the matching contacts.

Information from BillQuick records are stored in Outlook as follows:

- **Employees or Vendors:** The Employee Home Phone is stored as the Primary Telephone Number of the Outlook contact. The address of the employee or vendor from BillQuick is stored in the Outlook contact's business address field.
- **Clients:** The Client Phone is stored in the Outlook contact's Primary Telephone Number field. The client address from BillQuick is stored in the Outlook contact's Business Address field.
- **Client Contacts:** The Client Contact Work Phone is stored in the Outlook contact's Primary Telephone Number field. The address of the BillQuick client contact is stored in the Business Address field in Outlook.

The rest of the fields for Employees, Vendors, Clients and Client Contacts (that is, First name, Last Name, Company, Email, Title, etc.) are stored in the corresponding fields with matching names for a contact in Outlook.

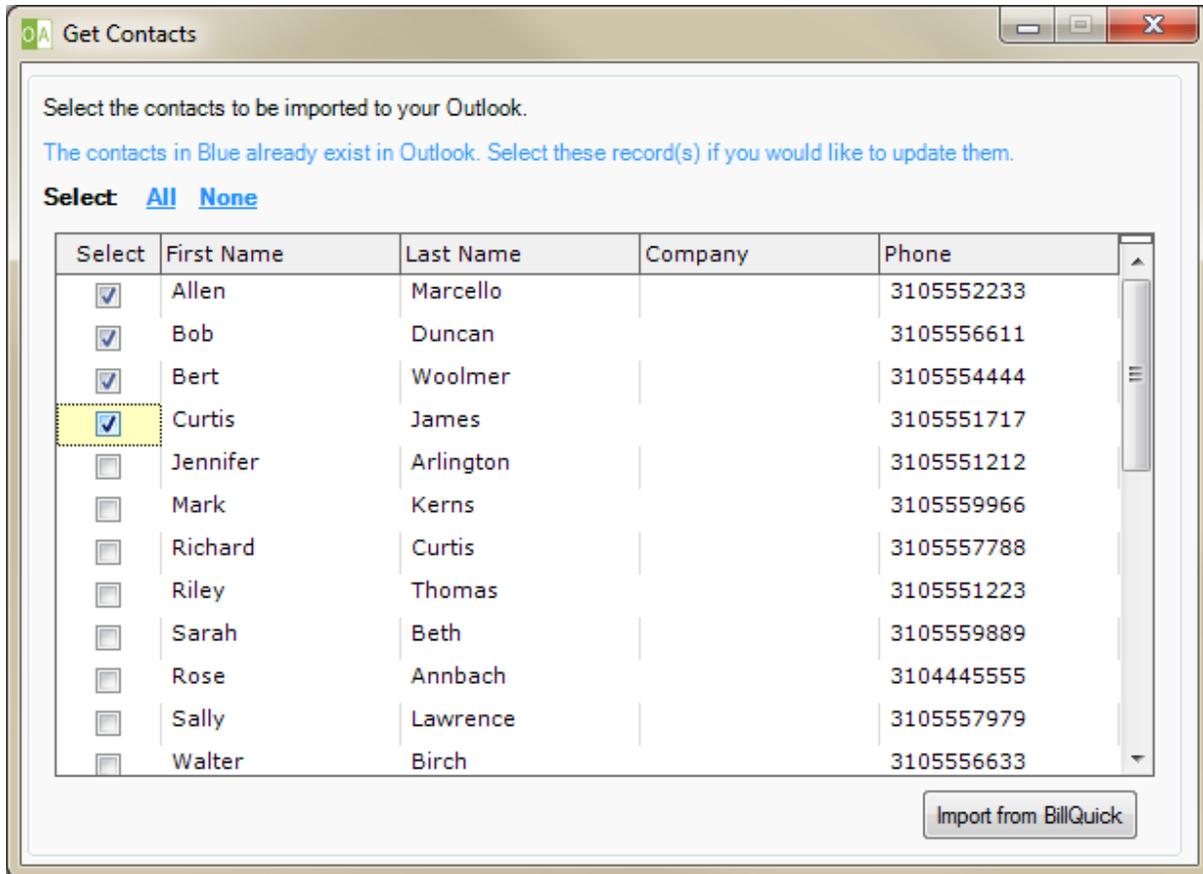
Reference Info

GET CONTACTS

BillQuick Outlook Add-In allows you to get Employee, Clients, Client Contacts and Vendor records from BillQuick. After you choose the type of records that you want to get into Outlook as contacts, BillQuick Outlook Add-In displays a window listing the matching contacts.



Items that have already been transferred to Outlook are displayed in blue.



Get Contacts Grid:

This grid displays a list of contacts that match the type you selected from the *BillQuick, Get From* menu. The grid might list the BillQuick employees, vendors, clients or client contacts, depending upon what you want to import into Outlook. Select the check box in the **Select** column against a contact to flag it for import. Click **All** to select all records, **None** to clear all records.

Import from BillQuick:

Click to start the import process.

How Do I

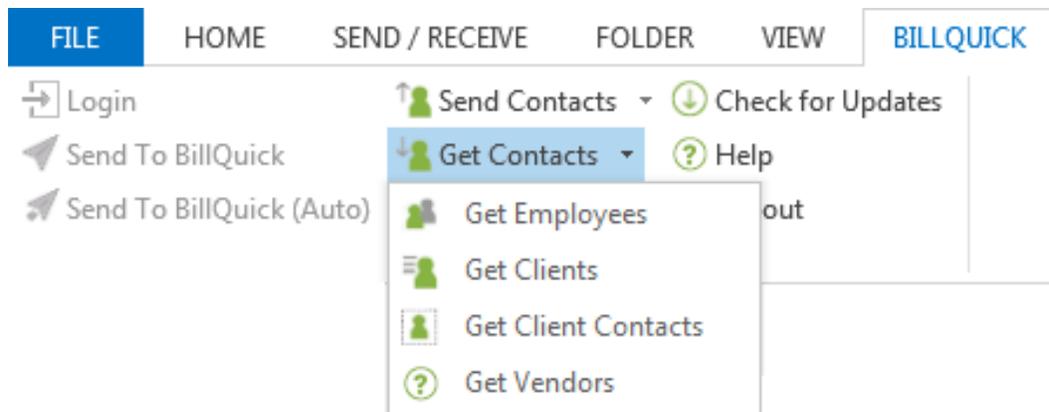
HOW DO I GET CONTACTS FROM BILLQUICK?

Do the following to import contact information from BillQuick to Outlook:

1. In Outlook Contacts view, select BillQuick menu > Get Contacts and choose the contact type you want to transfer to Outlook (that is, Employee, Vendor, Client or Client Contact). A list of employees, vendors, clients or client contacts displays.



Items that have already been transferred to Outlook are displayed in blue.



2. On the [Get Contacts](#) screen, select the BillQuick contacts you want to transfer to Outlook and click **Import From BillQuick**.

APPENDIX

IMPLEMENTATION CHECKLIST

The following Implementation Checklist outlines the steps to follow in order to deploy BillQuick Outlook Add-In in your company. Typically, a BillQuick Supervisor will use it during the setup process.

Check	Stage	Task	Details
<input type="checkbox"/>	Pre-Installation	Check our system requirements	Software Requirements Hardware Requirements Getting Started Guide
<input type="checkbox"/>	Installation	Download BillQuick Outlook Add-In setup	Support Downloads
		Install BillQuick Outlook Add-In	Installation on a single computer Installation on multiple computers (would depend on the number of licenses purchased)
<input type="checkbox"/>	Pre-Implementation	BillQuick Database	Activate, license and register the software for unlimited use
<input type="checkbox"/>	Implementation	BillQuick Database	BillQuick Outlook Add-In functionality depends on the BillQuick database and hence you need to connect to it. BillQuick should be installed on the same system as your BillQuick Outlook Add-In.
		Settings	You can specify your preferences in the BillQuick Outlook Add-In Settings screen (accessed from the BillQuick menu in Outlook).
		Send to BillQuick	Send appointments, tasks and emails to BillQuick as time entries
		Get from BillQuick	Retrieve data from BillQuick. BillQuick Outlook Add-In can be used to create Outlook contacts from BillQuick employee, client, client contact and vendor records.

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