BillQuick Online-QuickBooks Online Integration 2017

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INTRODUCTION

BillQuick Online is a cloud-based solution for time and expense tracking, billing, and project management. Besides Accounts Receivable, it also includes Accounts Payable functions. BillQuick Online is an Intuit-approved application that integrates with QuickBooks Online.

QuickBooks Online is a cloud-based general accounting software. It includes functions such as General Ledger, Accounts Receivable, Account Payable, Payroll, Reports, etc.

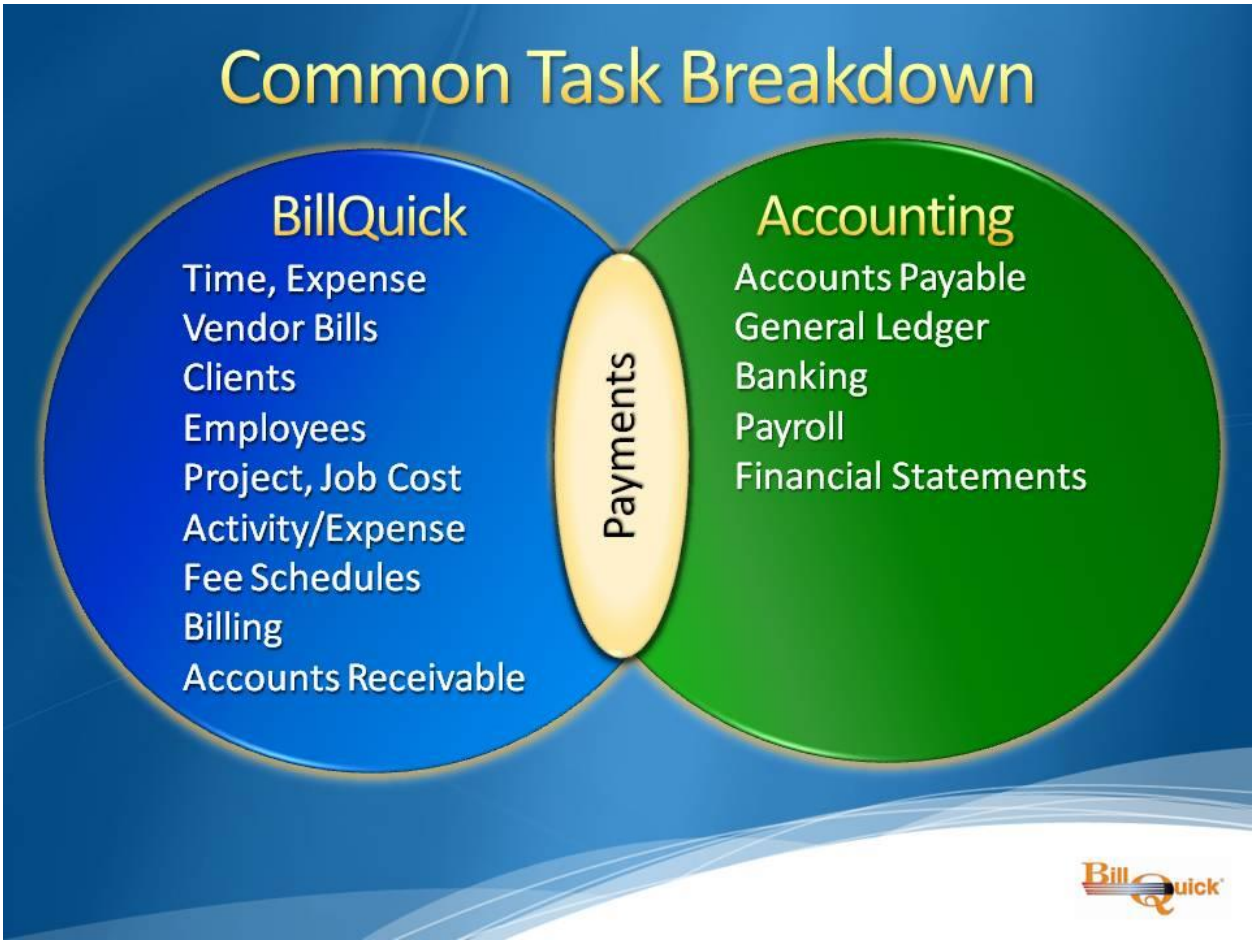
BillQuick Online integrates with QuickBooks Online to provide a complete business management solution for your firm. You can link BillQuick Online and QuickBooks Online in two ways: through BillQuick Online or through Intuit. See the Login section for details.

Benefits

Data integration provides the following benefits:

- No duplicate entry
- Time savings
- Faster billing
- Data accuracy
- Smooth and secure flow of information

The **BillQuick Online↔QuickBooks Online Integration Guide** helps you efficiently integrate data between the applications. After the first-time integration, you can control how and when future syncing of data occurs. You can choose appropriate accounts, what data flows between the programs, and much more. Typically, we suggest the following best practices:



Want to understand data integration and best practices in depth? Prefer that an expert handle your first-time integration? Please contact your BQE Account Manager for more information at (888) 245-5669 or Sales@bqe.com. Also, check out BQE Training and BQE Consulting.

How to Use This Guide

The Login section deals with creating a BillQuick Online account and logging into BillQuick Online.

How Integration Works explains, in non-technical language, what data is shared between the two programs and various synchronization settings. This helps you visualize what happens behind the scenes.

Initial Integration explains the different scenarios so that you can choose the best one for your company. The instructions help whether you are a new or an existing BillQuick Online or QuickBooks Online user.

After the initial integration, Quick Check helps you to confirm whether your data synced accurately or not. *Do not skip this important first-time integration step.*

Software Editions Supported

BillQuick Online integrates with all the three flavors of QuickBooks Online: Simple Start, Essentials and Plus.

QuickBooks Online editions, Simple Start and Essentials, do not support the Time Entry and Expense Code feature of BillQuick Online.

System Requirements

As a cloud-based solution, BillQuick Online requires only an Internet connection (high-speed is recommended) and a web browser that supports JavaScript. Supported browsers include:

Windows PCs:

- Windows 8/7
- Microsoft Internet Explorer 10.0 or later, Chrome 30.0 or later, Firefox 30.0 or later, Opera 20.0 or Safari 6.0 or later

Apple Mac:

- Mac OS 10.0 or later
- Safari 6.1 or later

LOGIN

You can log into BillQuick Online in two ways: through BillQuick Online or through QuickBooks Online.

Login through BillQuick Online

To use the BillQuick Online-QuickBooks Online Integration feature, you must have a BillQuick Online account. If you do not have one, set up a new account as follows:

1. Go to BillQuick Online.
2. Select Free Trial.
3. Enter your information, including your email address as the account owner.
4. In a few minutes, you will receive a verification email. Follow the instructions to complete the setup

process. BillQuick Online creates a new company file automatically.

5. Replace your temporary password with a permanent one.

6. Add more users, if desired

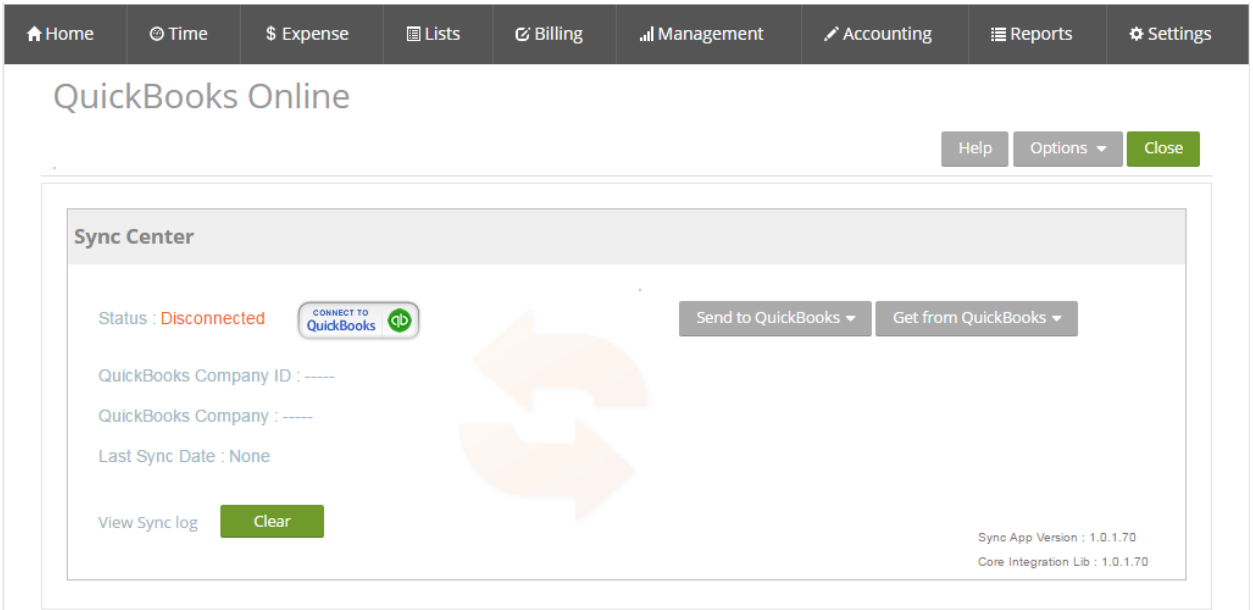
For users with an existing BillQuick Online account:

1. Go to BillQuick Online.

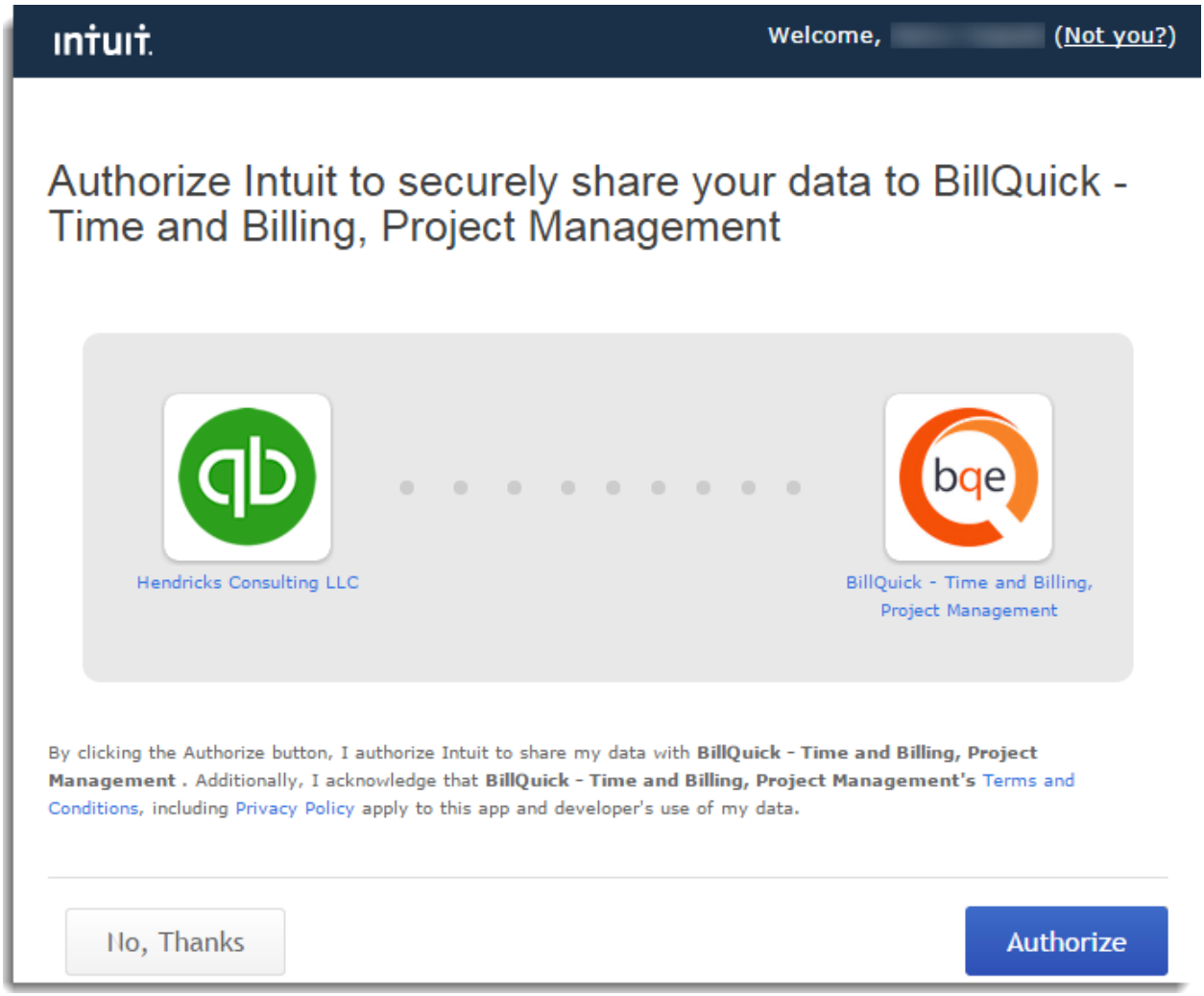
2. Enter your login name or email address; enter your password and log in.

3. Select the relevant BillQuick Online company whose data you want to integrate with QuickBooks Online. Then click Open.

4. In BillQuick Online, click Home on the navigation bar and select QuickBooks Online from the drop-down menu.



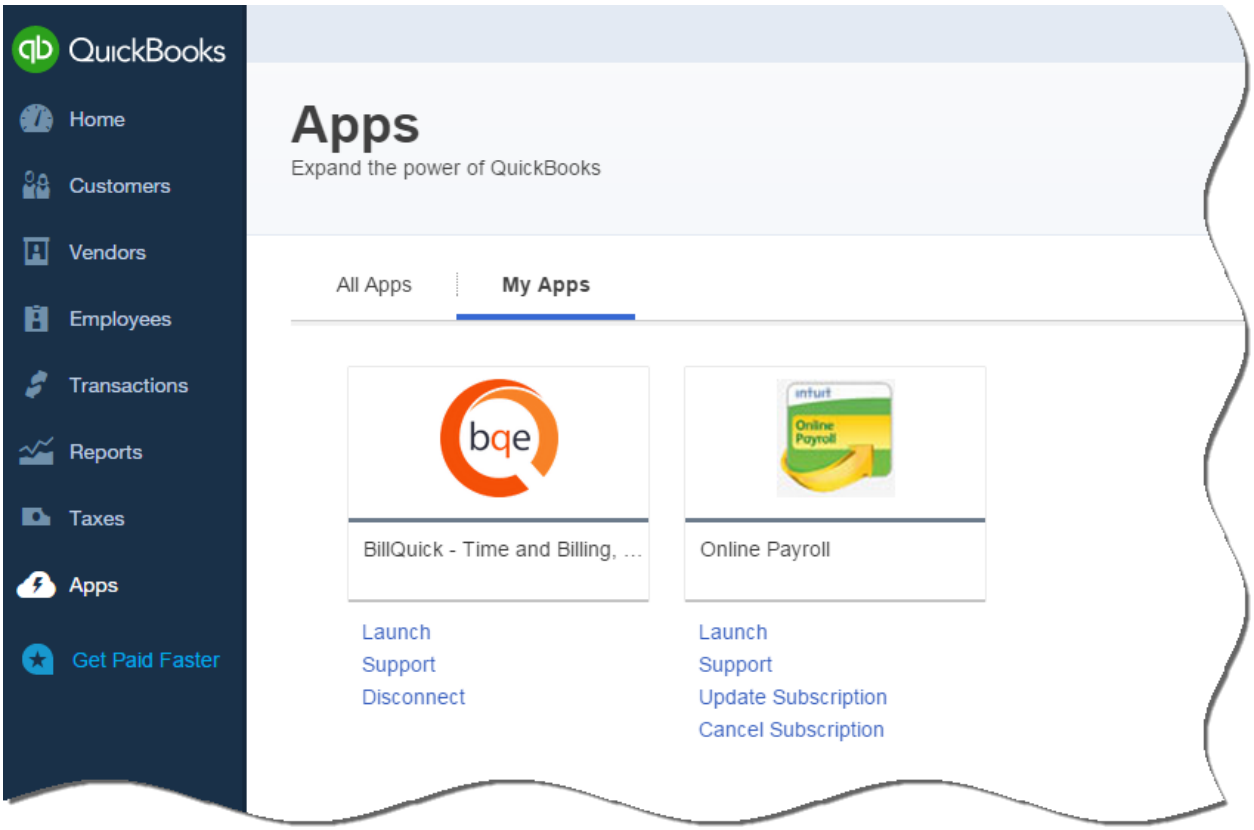
5. Click the Connect to QuickBooks button and provide the requested information to sign in. During this, your login credentials pass through the Intuit server for authentication, which in turn authorizes BillQuick Online to access QuickBooks Online data.



6. When you return to BillQuick Online, you will be connected.

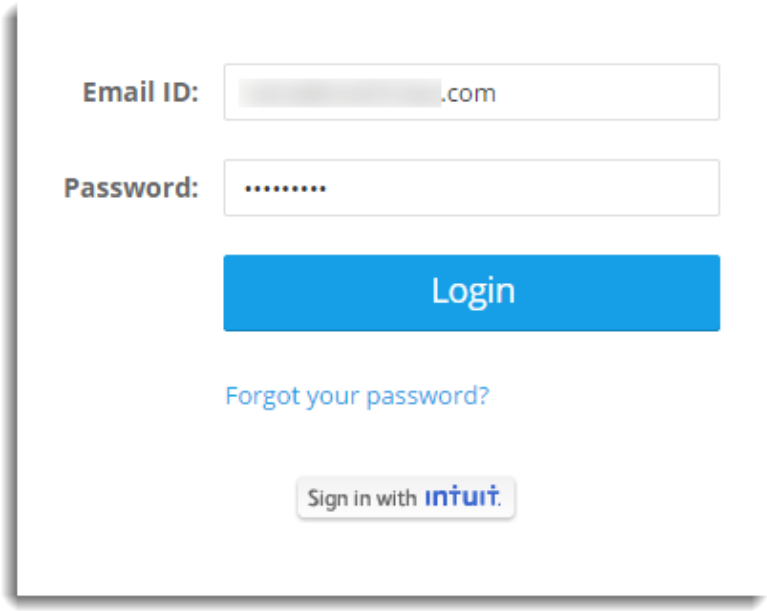
Login through Intuit

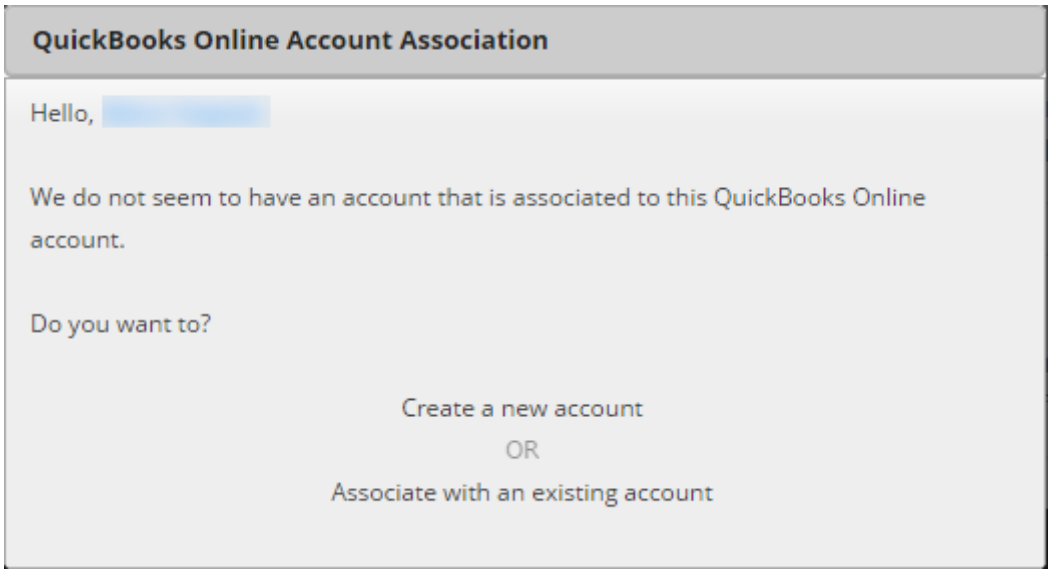
You can launch BillQuick Online from the Intuit App Center under My Apps or from your QuickBooks Online account under Apps > My Apps. Then authorize QuickBooks Online to share data with BillQuick Online. You must have a BillQuick Online account to be associated with the QuickBooks Online account. Finally, complete a short BillQuick Online start-up interview.



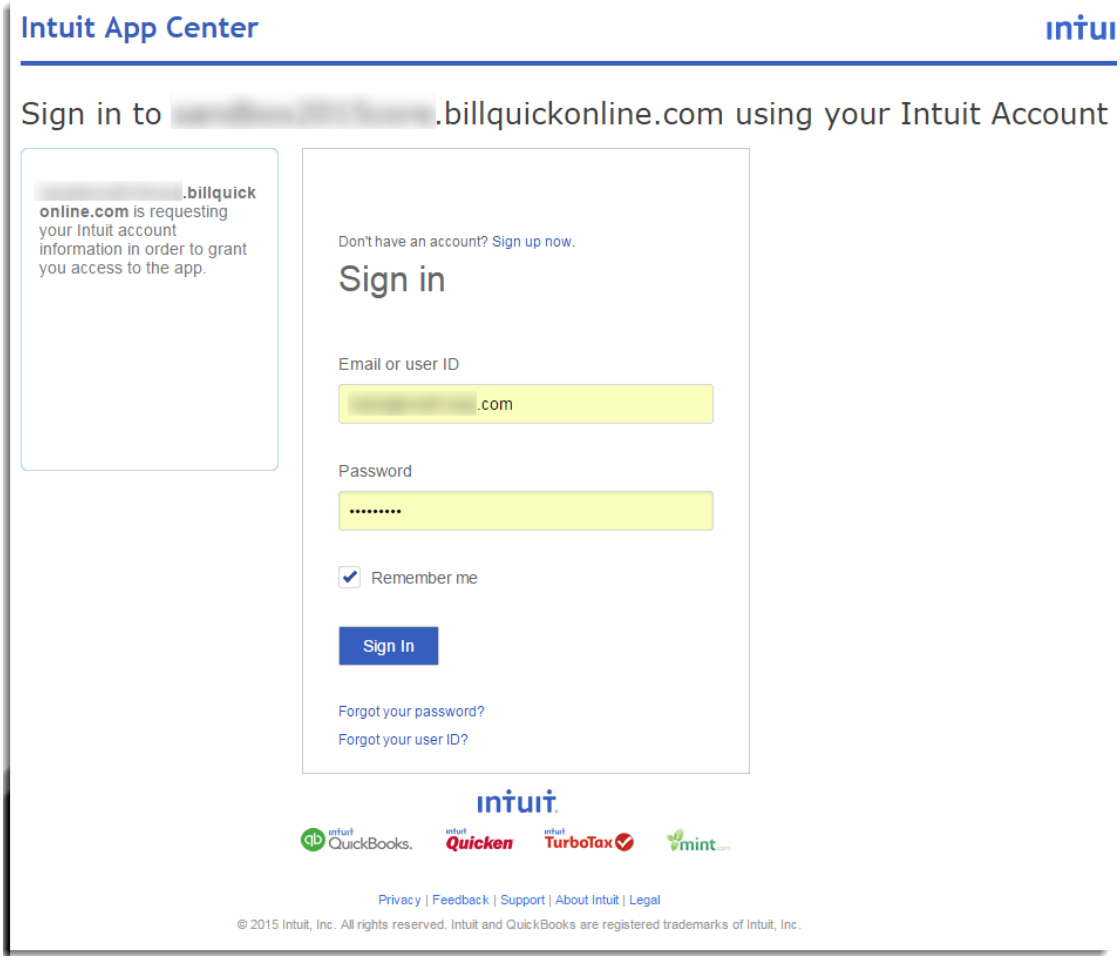
Alternatively, *Sign in with Intuit* gives you extra flexibility in using your Intuit credentials to sign into BillQuick Online. To connect BillQuick Online and QuickBooks Online databases using this option:

1. Click the Sign in with Intuit button on the BillQuick Online Login page.
2. It prompts you to authorize BillQuick Online to access your Intuit account name and email address. You are then prompted to associate your Intuit account with a new or an existing BillQuick Online account.





3. After the association, the Intuit App Center sign-in screen displays.



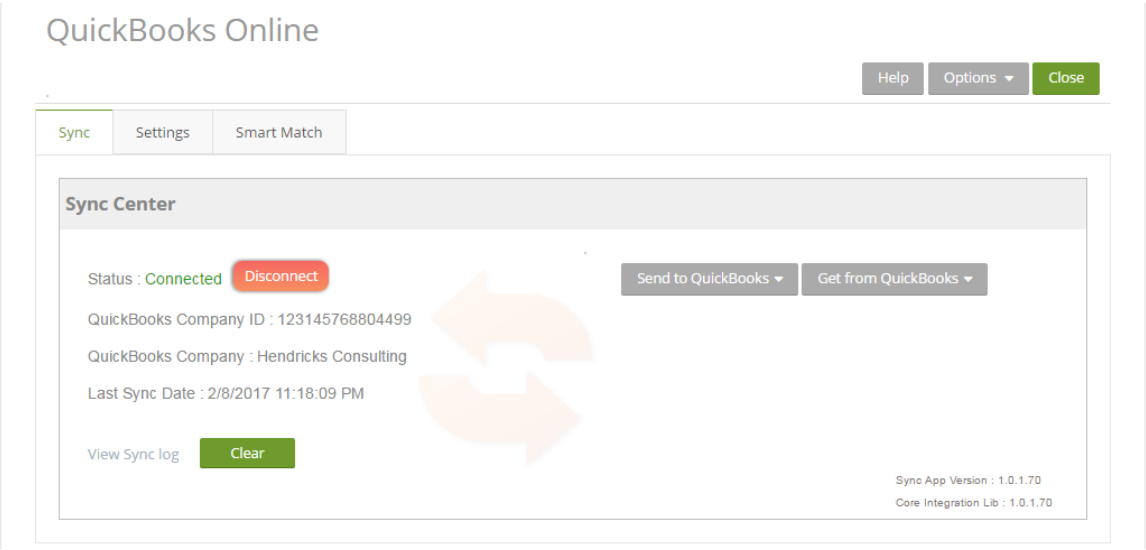
4. Enter your Intuit Email or user ID and Password. Click Sign In.

5. On the My Apps page, select your company database. BillQuick Online and QuickBooks Online are connected now.

When you log into BillQuick Online using *Sign in with Intuit* button, you only have to sign in once instead of signing in to both the programs and on Apps.com.

Disconnect

You can disconnect BillQuick Online and QuickBooks Online by clicking the Disconnect button on the Sync Center or by choosing the Disconnect option from the Intuit App Center. BillQuick Online might be disconnected from QuickBooks Online ('timed out') but you can connect again at any time.



HOW INTEGRATION WORKS

Whether or not you have a technical background, it is helpful to understand the basics of BillQuick Online↔QuickBooks Online Integration. With this knowledge, you can visualize what happens behind the scenes as BillQuick Online manages the transfer of data to and from QuickBooks Online.

There are some differences between BillQuick Online and QuickBooks Online that should be understood to ensure smooth and accurate data integration. BillQuick Online is project-centered and supports a hierarchical structure. In contrast, QuickBooks Online is client-centered and uses a flat job (project or sub-customer) structure. Each record that BillQuick Online and QuickBooks Online have in common shares a unique Link ID that identifies them as related. This ***does not*** mean that data in both databases is exactly the

same; only that they share common data. BillQuick Online Project records contain data and options that QuickBooks Online Sub-Customer records do not, and vice versa. What is important for integration is that the two programs share key data.

Data Flow

The table below shows the direction data can *potentially* flow between BillQuick Online and QuickBooks Online. Whether it flows in one direction or the other (or both directions) depends on choices made on the Settings screen. You can be very specific in determining how data flows *to* and *from* BillQuick Online.

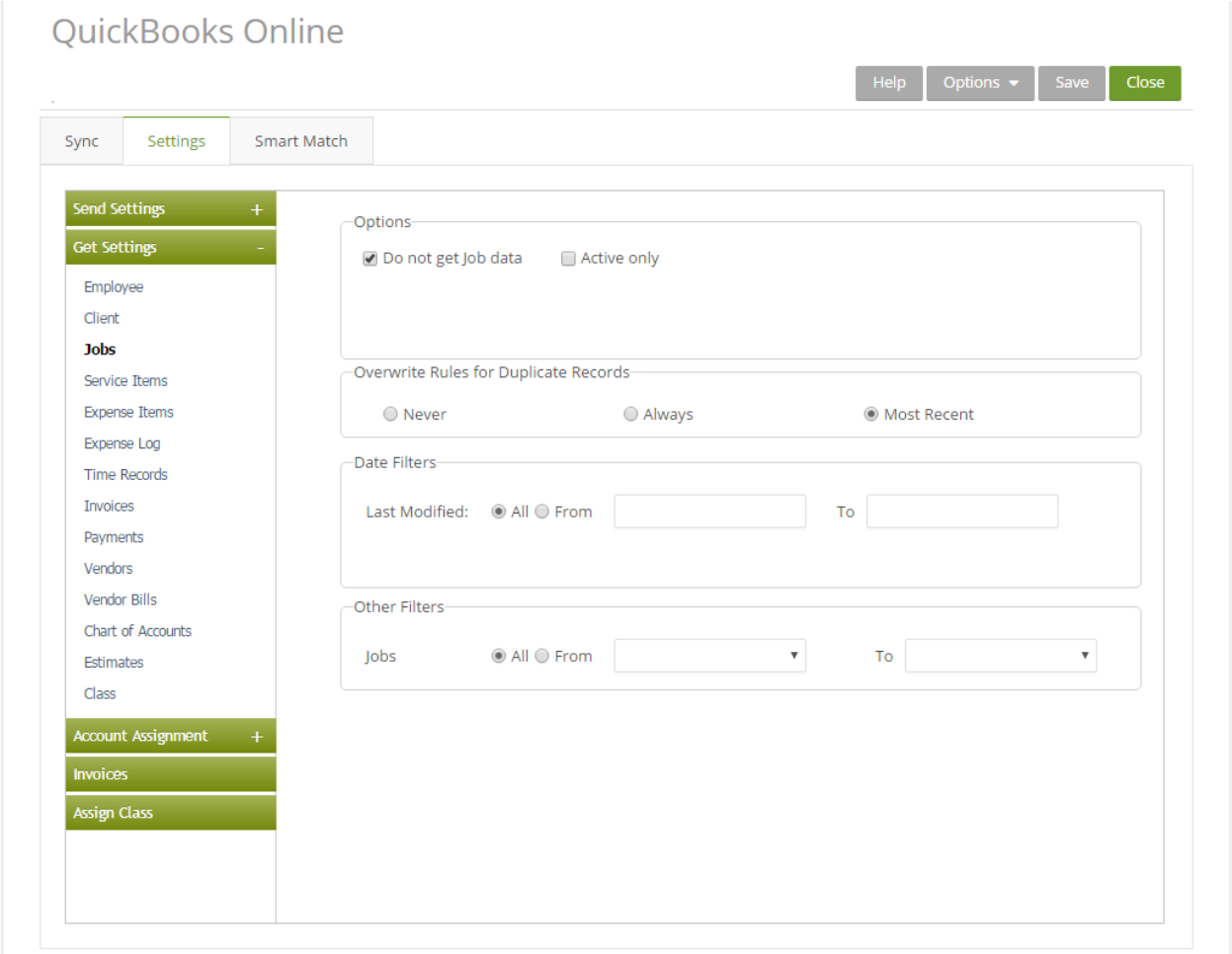
BillQuick Online Items	Dataflow	QuickBooks Online Items
Activity	⇆	Service Item
Expense	⇆	Other Charge Item
Employee	⇆	Employee
Vendor	⇆	Vendor
Client	⇆	Customer
Project	⇆	Sub-Customer
Estimate	←	Estimate
Class	⇆	Class
Time Entry	⇆	Time Tracking
Expense Log	←	Checks/Credit Cards
Accounts	⇆	Chart of Accounts
Vendor Bills	⇆	Vendor Bills
Invoices	⇆	Invoices
Payments	⇆	Payments

Sync Center

In BillQuick Online, the Sync Center allows seamless integration between BillQuick Online and QuickBooks Online. Integration rules can be set before or after first-time integration on the Settings tab. Typically, you will not restrict the transfer of data. However, users with existing QuickBooks Online data may want to limit the data that transfers from QuickBooks Online to BillQuick Online.

All Sync Center actions are company-specific and not user-specific.

After the first-time integration, you might want to set integration rules, for example, to send only project data to QuickBooks Online as BillQuick Online maintains more data than QuickBooks Online. Also, BillQuick Online is designed to manage projects and QuickBooks Online is not. In this example, you would choose 'Do not get Job data' (that is, turn off the flow of data) on the Settings tab > Get Settings panel.



Data synchronization between BillQuick Online and QuickBooks Online is not a one-time task. Depending on your daily processing and preferences, you might sync several times a day, once a day, once a week and so on.

Sync Log

BillQuick Online creates a date-stamped sync log that records events and exceptions involved in data synchronization with QuickBooks Online. You can view it by clicking the View Sync Log link on the Sync Center.

SYNC SETTINGS

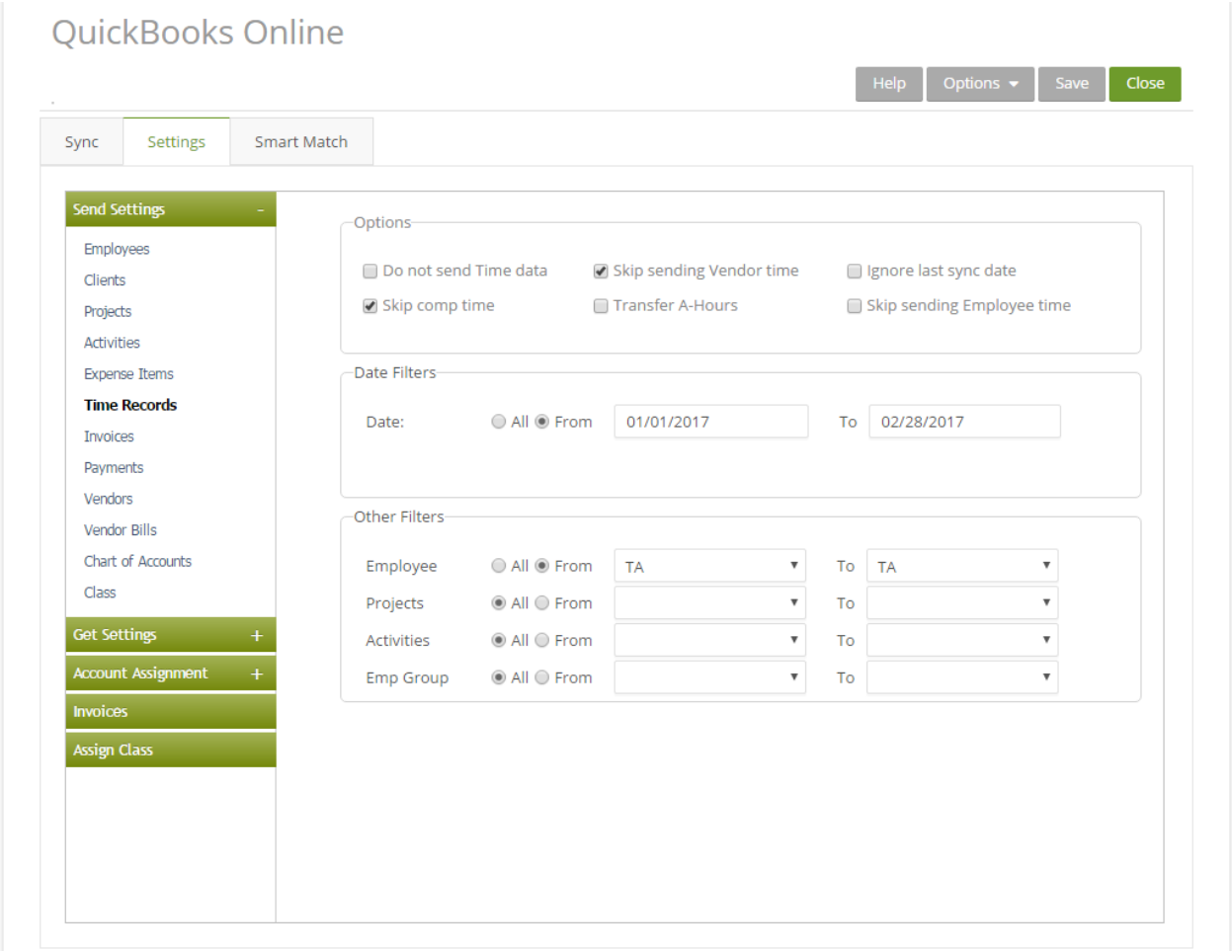
In BillQuick Online, you can specify data transfer rules and settings from the Settings screen. These settings control what data syncs between BillQuick Online and QuickBooks Online.

Using the Settings screen, you can specify the following:

- Send Settings
- Get Settings
- Account Assignment
- Invoices
- Assign Class

Send Settings

Send Settings are rules for transferring data from the BillQuick Online database to QuickBooks Online. You can restrict the data sent to QuickBooks Online by specifying filters. *For a description of each field on this screen, see the BillQuick Online Help.*

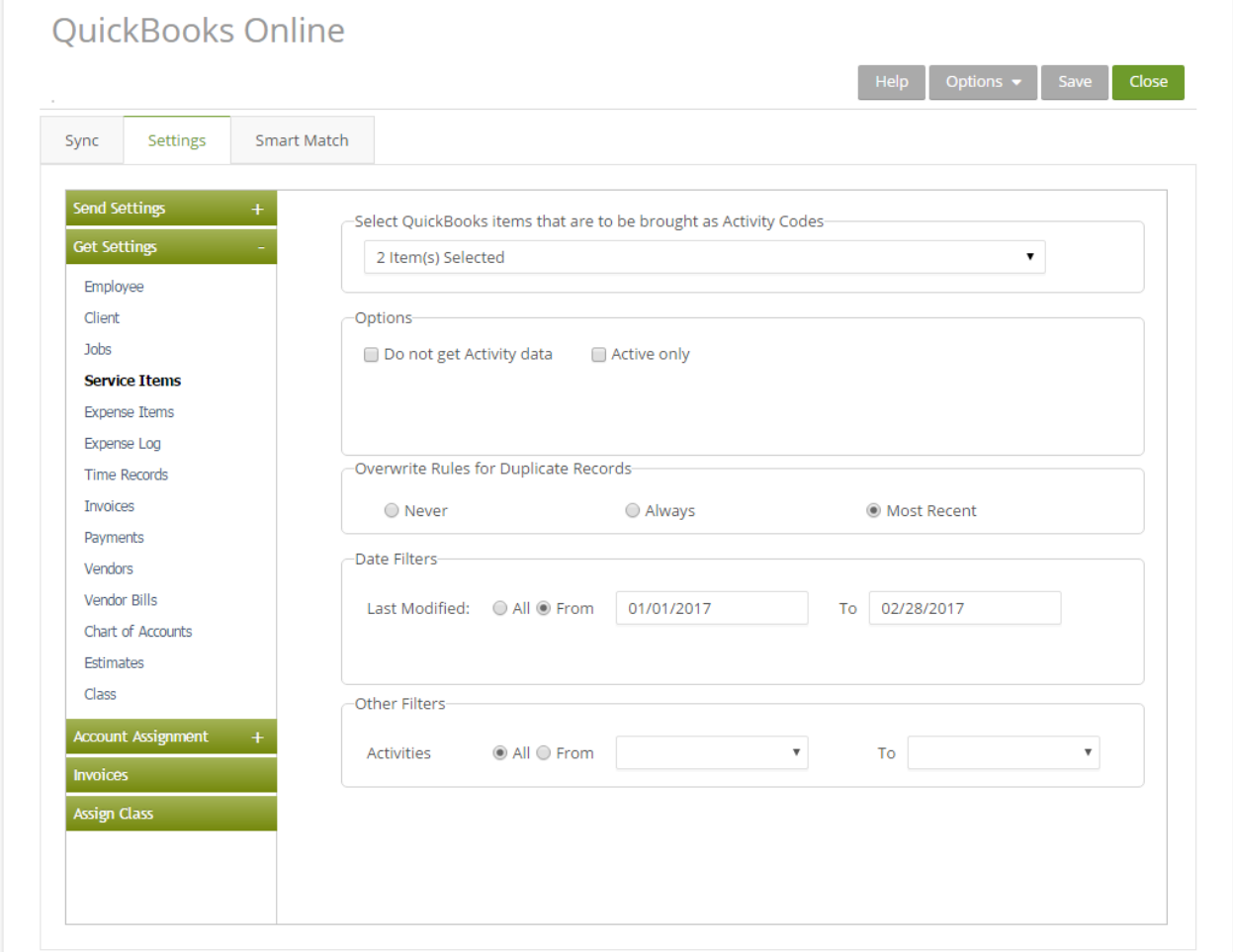


The Send options change depending upon the module selected on the left side of the screen.

Get Settings

Get Settings are rules for transferring data from QuickBooks Online to the BillQuick Online database. You can restrict the data received from QuickBooks Online by specifying filters. For a description of each field on this screen, see the BillQuick Online Help.

The Get options change depending upon the module selected on the left side of the screen.



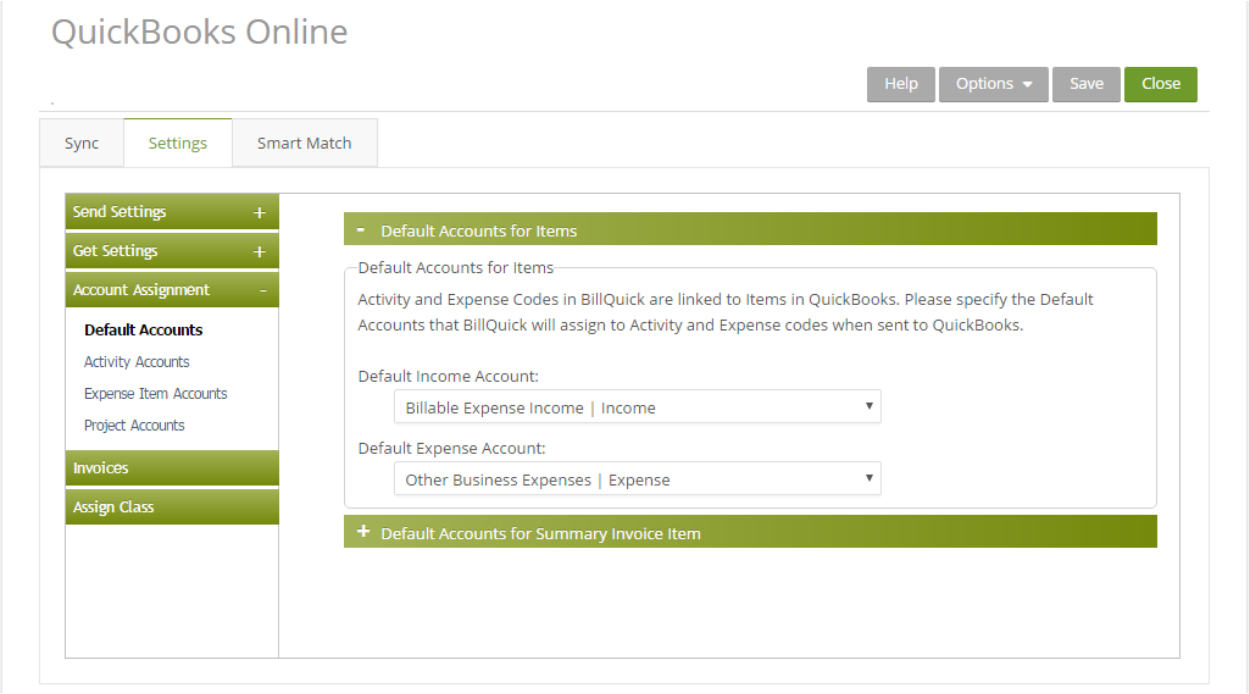
Account Assignment

Activity Codes in BillQuick Online are linked to Service Items in QuickBooks Online. Similarly, Expense Codes in BillQuick Online are linked to Inventory Items in QuickBooks Online. On the Account Assignment panel of the Settings tab, you can assign accounts to various BillQuick Online items. *For a description of each field on this screen, see the BillQuick Online Help.*

Default Accounts

You must select the default accounts that BillQuick Online will assign to activity (non-inventory) items, expense (inventory) items and summary invoice items sent to QuickBooks Online.

When BillQuick Online invoices are transferred to QuickBooks Online, the actual time and expense line items are transferred and posted to their respective income and expense accounts. However, when invoice details are not transferred, BillQuick Online sends service and expense items as single line items. Hence, you must also specify the income and expense accounts to associate with these items for summarized invoices.



If no accounts display on this screen, you can create them in the Chart of Accounts screen in BillQuick Online. You need to create three accounts:

- Category type: Income

  Detail type: Sales of Product Income

- Category Type: Cost of Goods Sold

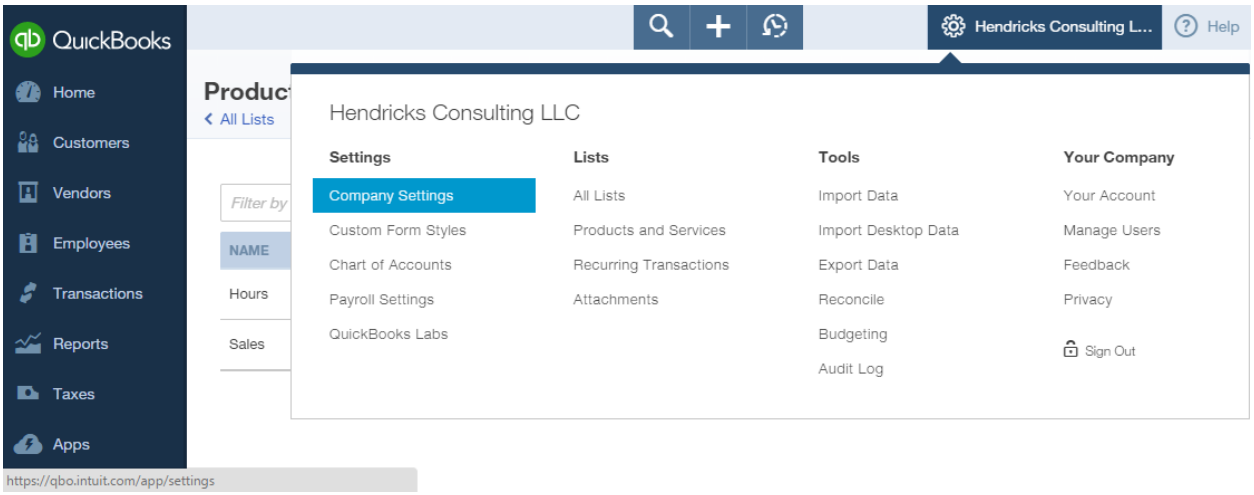
  Detail Type: Supplies and Materials

- Category Type: Other Current Asset

  Detail Type: Inventory

Alternatively, you can go to QuickBooks Online and follow these steps:

1. Go to Settings > Company Settings > Sales > Products and Services.



2. Check the following options:
   - Show Product/Service column on sales forms
   - Track quantity and price/rate
   - Track quantity on hand
3. Click Save and then Done.
4. Go to Lists > Products and Services.
5. Click New and select the *Track Quantity on Hand* option. You will see the accounts under Default Accounts.

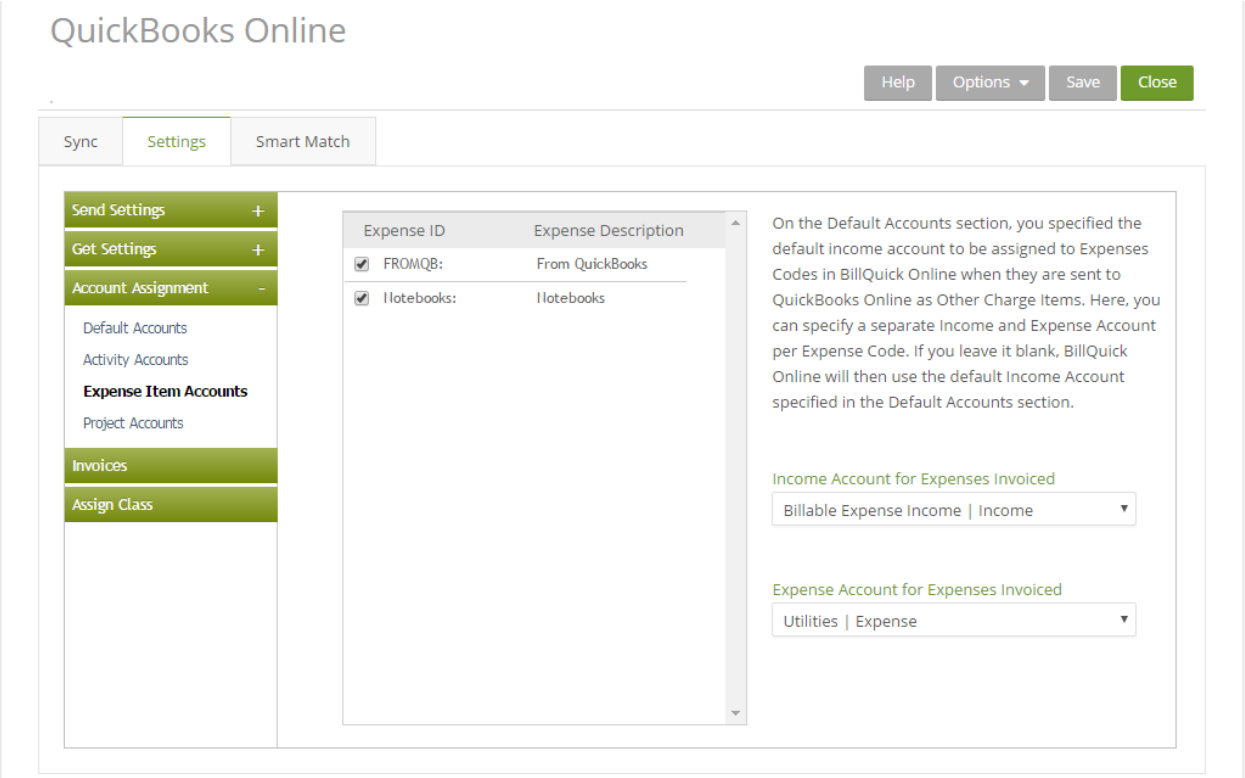
Activity Accounts

You can specify separate income and expense accounts for each BillQuick Online activity code (service item). Select an activity (or multiple activities) from the grid and assign the desired account to it from the drop-down lists. If you leave this blank, BillQuick Online will use the default accounts instead.

Expense Item Accounts

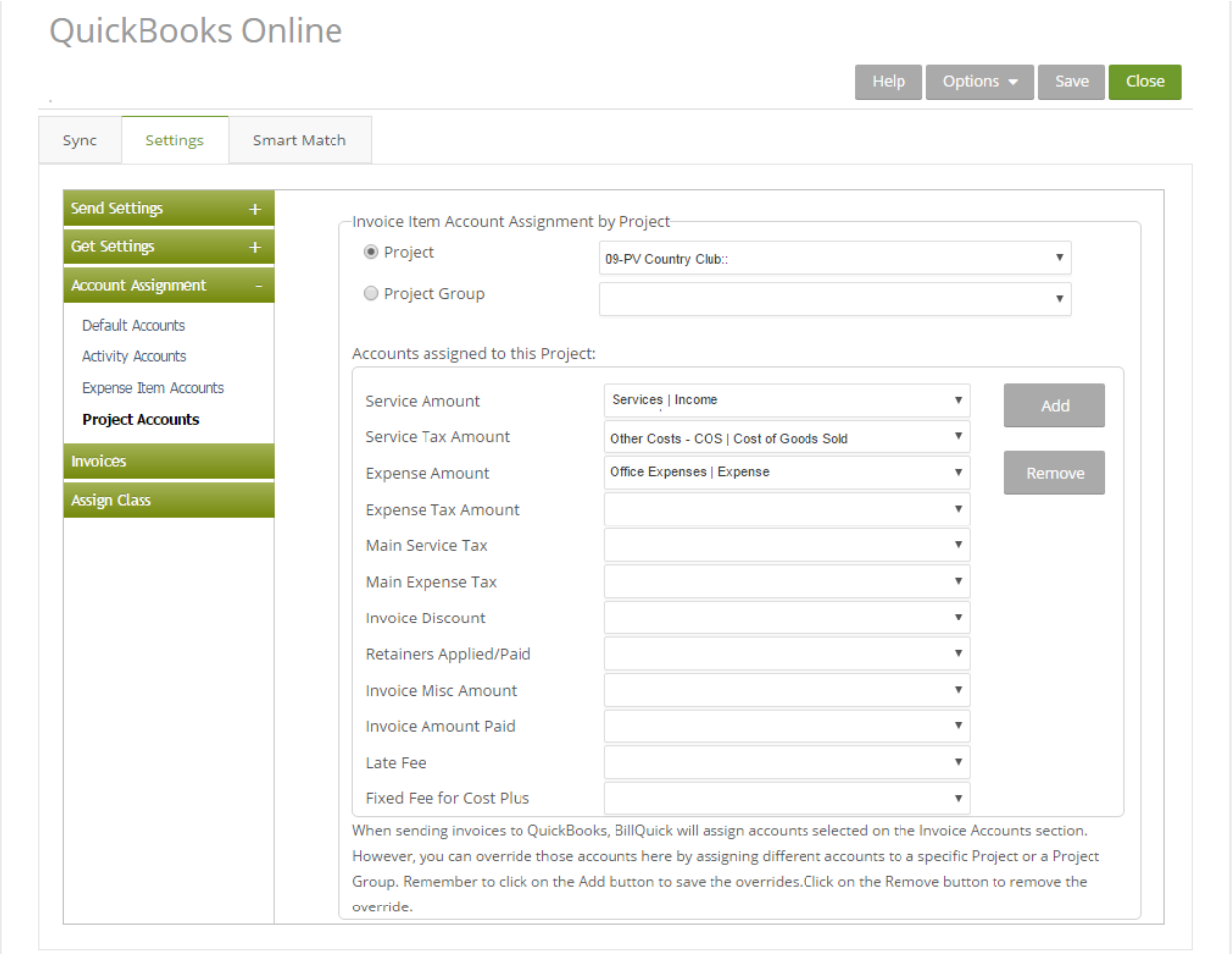
As in case of activity codes, you can specify separate income and expense accounts for each BillQuick Online expense code (other charge item). Select an expense (or multiple expenses) from the grid and assign the desired account to it from the drop-down lists. If you leave this blank, BillQuick Online will use the default accounts instead.

If you are using Make Expenses and Items Billable feature of QuickBooks Online, we recommend that you use an account of one of the following account types: expense, other expense, other current liabilities, other current assets, other assets, fixed assets, or COGS when specifying an account for expense code. QuickBooks Online does not allow billable expenses that uses account types other than the ones mentioned above.



Project Accounts

When sending invoices to QuickBooks Online, BillQuick Online assigns default accounts specified on the Account Assignment panel to the invoice items. You can override those accounts and assign different G/L accounts to invoice items on a project or project group basis. For the selected project or project group, each item on a BillQuick Online invoice like tax amount, discount, retainers, etc. can have a different G/L account assigned to it. When you sync invoices with QuickBooks Online, the corresponding G/L account will be updated there. Click the Add or Remove buttons to add or remove accounts to the project items.



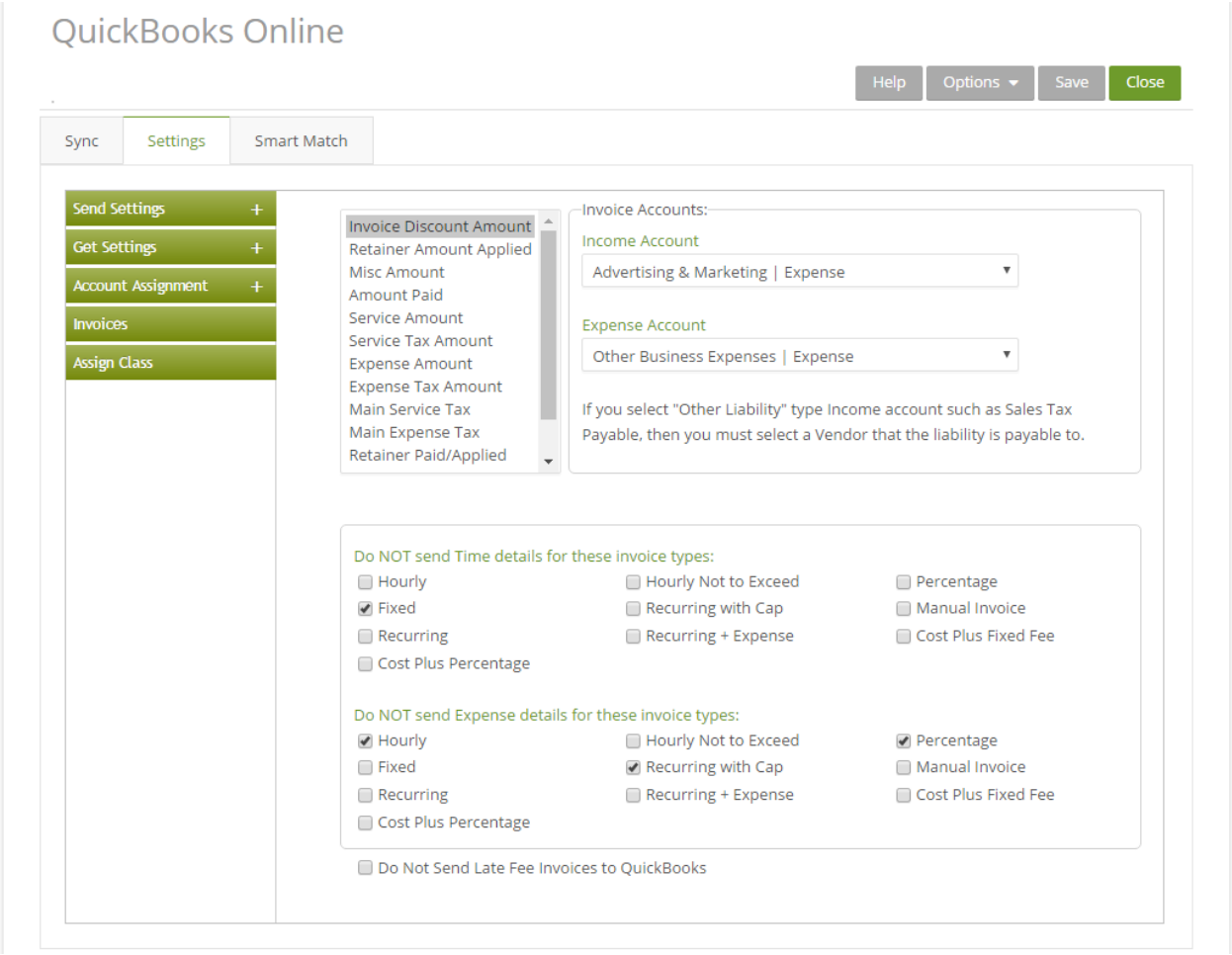
Invoices

Besides specifying accounts for activity and expense items, you need to specify default income and expense accounts for other invoice items. These are the accounts into which the service, expense, tax, retainer, late fee and other amounts on BillQuick Online invoices transfer upon synchronization. *For a description of each field on this screen, see the BillQuick Online Help.*

With each invoice, BillQuick Online sends up to four separate tax amounts to QuickBooks Online as line items. The four items are:

- *Service Tax Amount* –sum of Tax 1, Tax 2 and Tax 3 for time entries
- *Expense Tax Amount* –sum of Tax 1, Tax 2 and Tax 3 for expense entries
- *Main Service Tax Amount* –amount calculated on the total value of services using the MST rate
- *Main Expense Tax Amount* –amount calculated on the total value of expenses using the MET rate

Invoices having line items with zero units can be brought from QuickBooks Online to BillQuick Online.

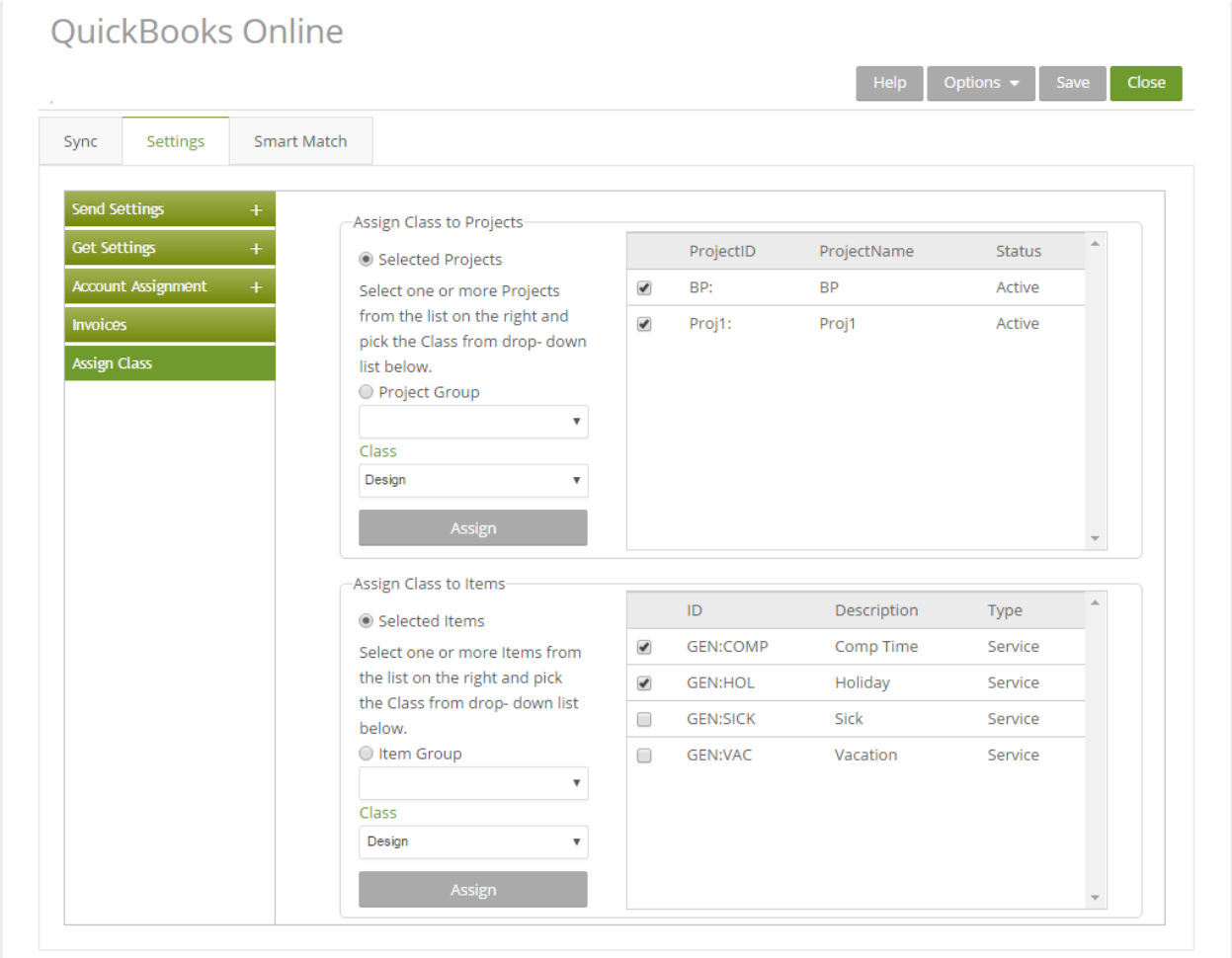


Assign Class

QuickBooks Online sets up transaction entities called classes. These allow you to view financial statements and other accounting reports for the entity. It is a very useful feature when running accounting reports. If you keep data from multiple locations in one file, you may assign a 'class' to each location to facilitate pulling together similar items for reporting. Another example is tracking revenues and expenses by partner or service type. Each of these 'classes' would be assigned to a project that is owned by a partner or is the scope of work for a service type. For instance, you can run a Profit & Loss by Class report in QuickBooks Online to see the income associated with different classes.

After establishing connection between the two programs, you can transfer these classes between QuickBooks Online and BillQuick Online, and assign them to items such as activities, expense codes, and projects.

Classes can be assigned to projects, services, expense items or their groups. BillQuick Online allows you to assign a QuickBooks Online class to each transaction item that you want to track. For a description of each field on this screen, see the BillQuick Online Help.

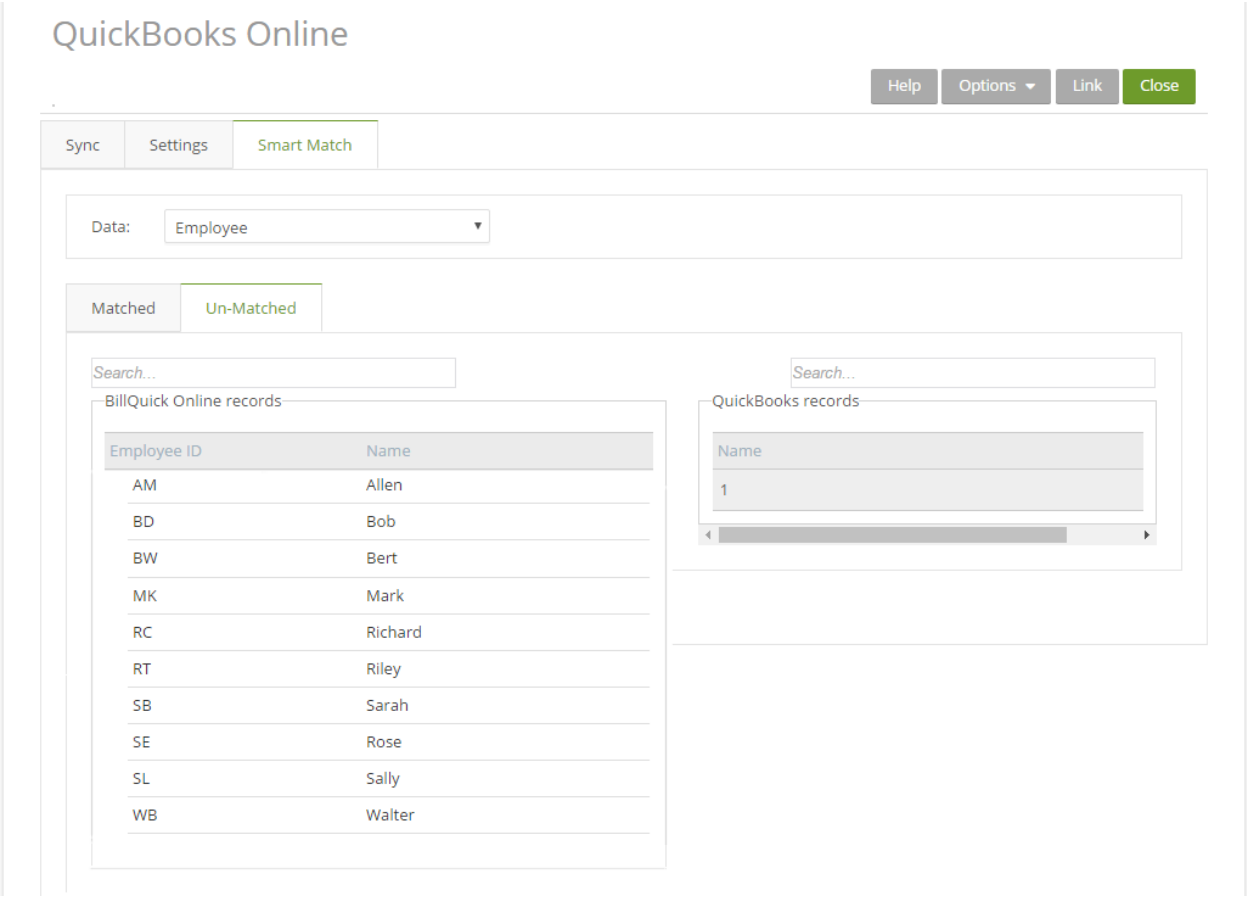


Smart Match

In case your Payroll option is on in QuickBooks Online, it does not allow transfer of employee data from BillQuick Online. A workaround for this is to create employee records manually in both programs (a one-time task) and then use the Smart Match option in BillQuick Online to link them.

You can make use of Smart Match to link similar employee records or unlink different records. With this, BillQuick Online attempts to find matching employee data (both active as well as inactive) and link it automatically. You can view employee records displayed in the grids separately for BillQuick Online and QuickBooks Online. For example, you can view employee data already matched between the two programs on the Matched Employees tab. If needed, you can select the matched records and then un-match them using the Unlink button. Similarly, on the Unmatched Employees tab, you will see unmatched data between

the two programs. If needed, you can select the unmatched records and then match them using the Link button.



Contact your BQE Account Manager (888-245-5669) if you want a BQE Consultant to handle the first-time integration for you or if you find duplicate records after integration is complete.

INITIAL INTEGRATION

Data integration is a process that transfers data between BillQuick Online and QuickBooks Online. The first-time or initial integration brings the databases of these two programs to the same level. Your initial synchronization settings determine what information and how much of it is shared between them.

To sync data, BillQuick Online must be connected to QuickBooks Online. Before starting the first-time integration, you can restrict what data transfers by selecting rules and filters on the Settings screen. Afterwards, you can use the Sync tab to transfer each type of data.

Choose the scenario below that best fits your situation.

If you have a large amount of data to sync between the two programs, it is best to sync a year of data at a time. Use the Setting filters to restrict the data transferring to or from BillQuick Online and QuickBooks Online.

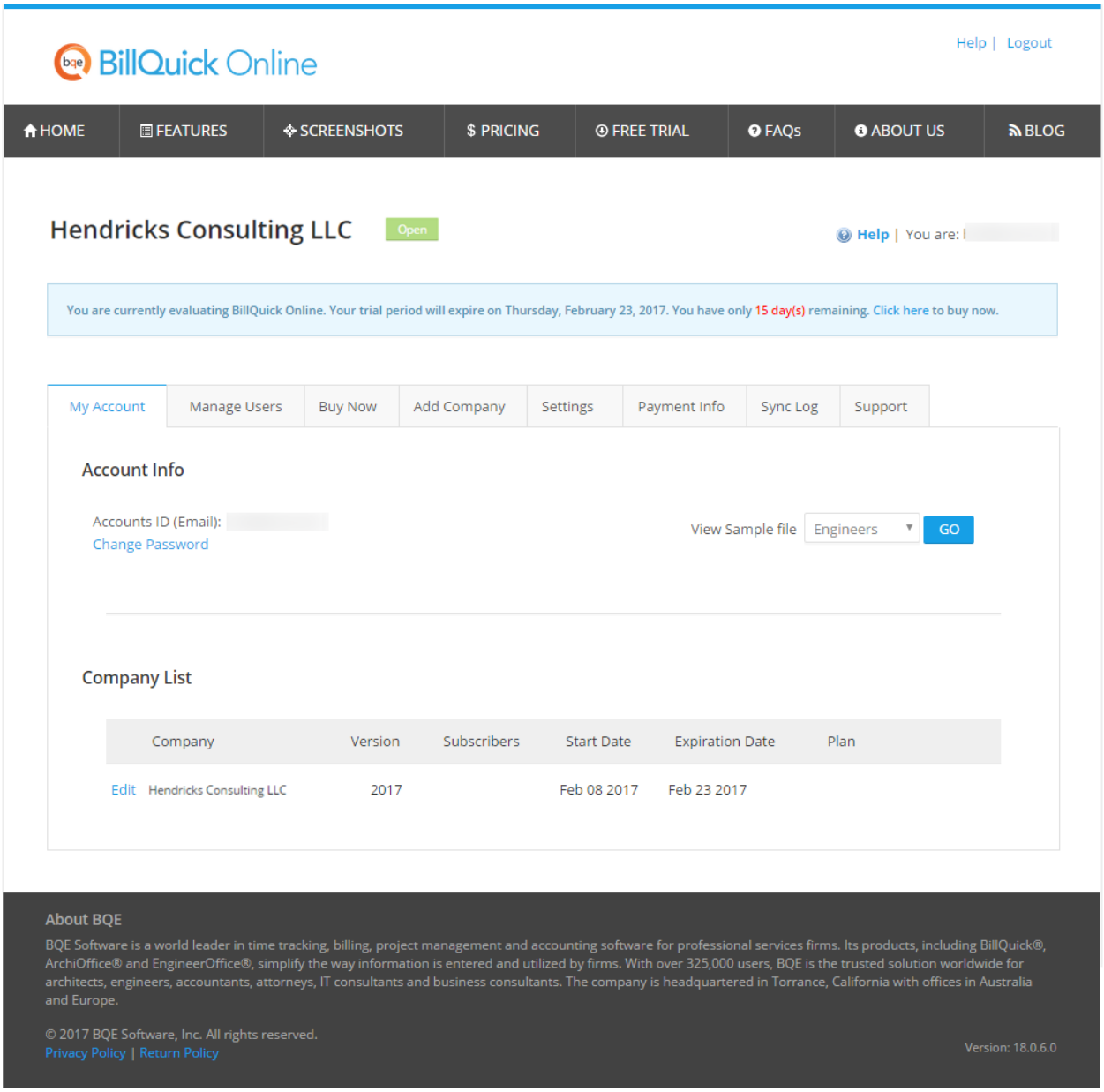
Scenario 1: New BillQuick Online User-Existing QuickBooks Online User

Before your first-time integration in which you transfer data from QuickBooks Online, check your QuickBooks master information and other data. You can add or edit the data as needed.

Before syncing data, you must have appropriate security permissions in BillQuick Online or be an Admin user.

1. Create BillQuick Online Company Database

When you sign up for a BillQuick Online account, a company database is created using the company name you provided. Also, you can choose an industry type in the signup process which sets the BillQuick Online company file for that industry. However, when you want to add another company to your BillQuick Online account, you can do so from its Add Company tab. You have to purchase separate licenses for users in each company.



BillQuick Online displays the Startup Wizard as soon as you validate your account. After you log into your BillQuick Online account, you have the option to buy the subscription.

You can enter or add your company data into the BillQuick Online database in one of the following ways:

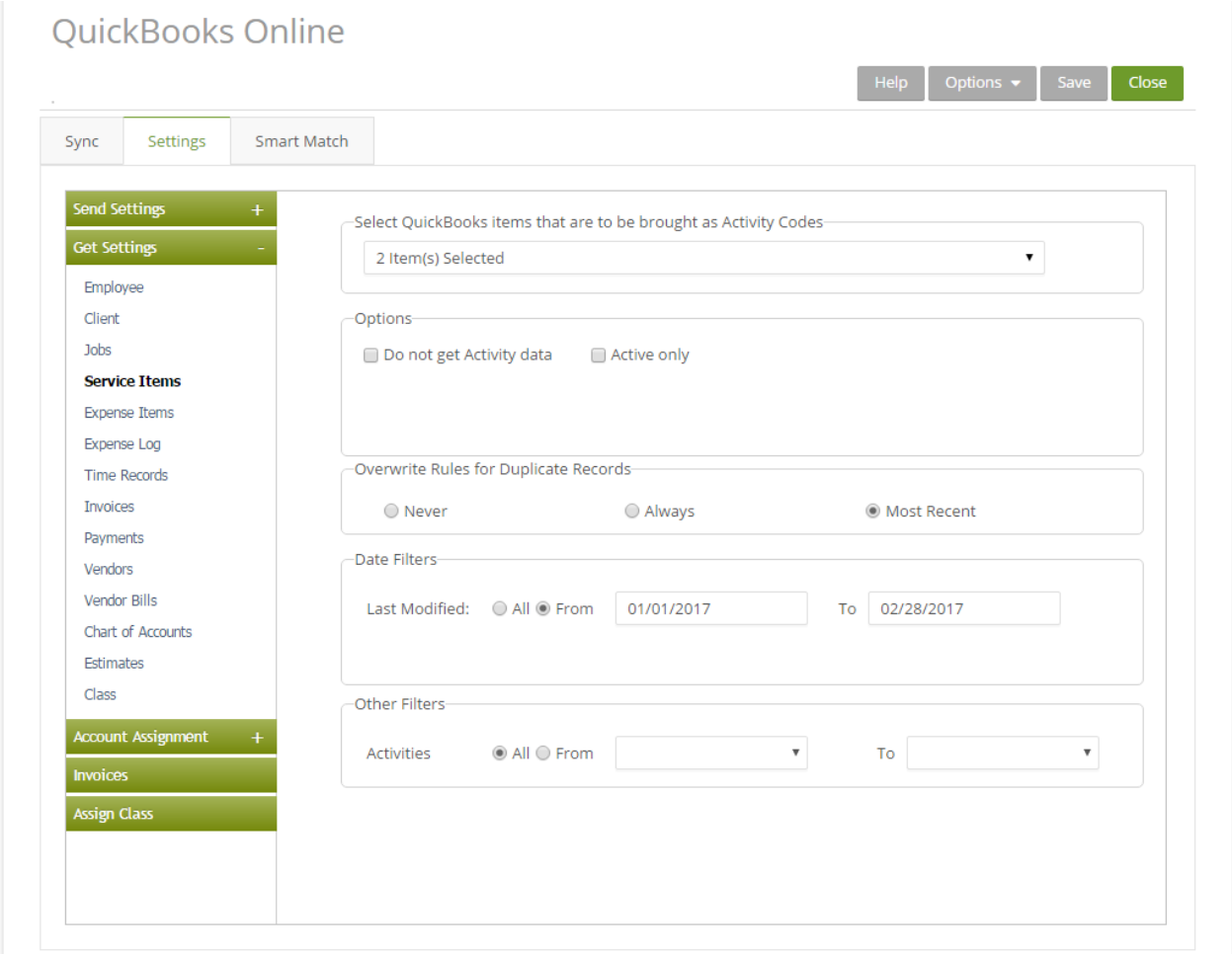
- Manual data entry into a fresh BillQuick Online company database
- BQE can perform the migration of your existing data into the BillQuick Online database and upload it for you. *Call your Account Rep for the details.*

To learn more on creating a BillQuick Online company database, check [BillQuick Online Getting Started Guide](#).

2. Specify Sync Settings

Specifying integration settings in BillQuick Online is necessary to define which data will be transferred as well as other preferences.

1. In BillQuick Online, click Home on the navigation bar and select QuickBooks Online from the drop-down menu.
2. Click on its Settings tab.
3. On the left side of the screen is a list of BillQuick Online modules for Get Settings. You can specify various filters and other synchronization options based on the module selected. *See the [Integration Settings](#) section for more information.*



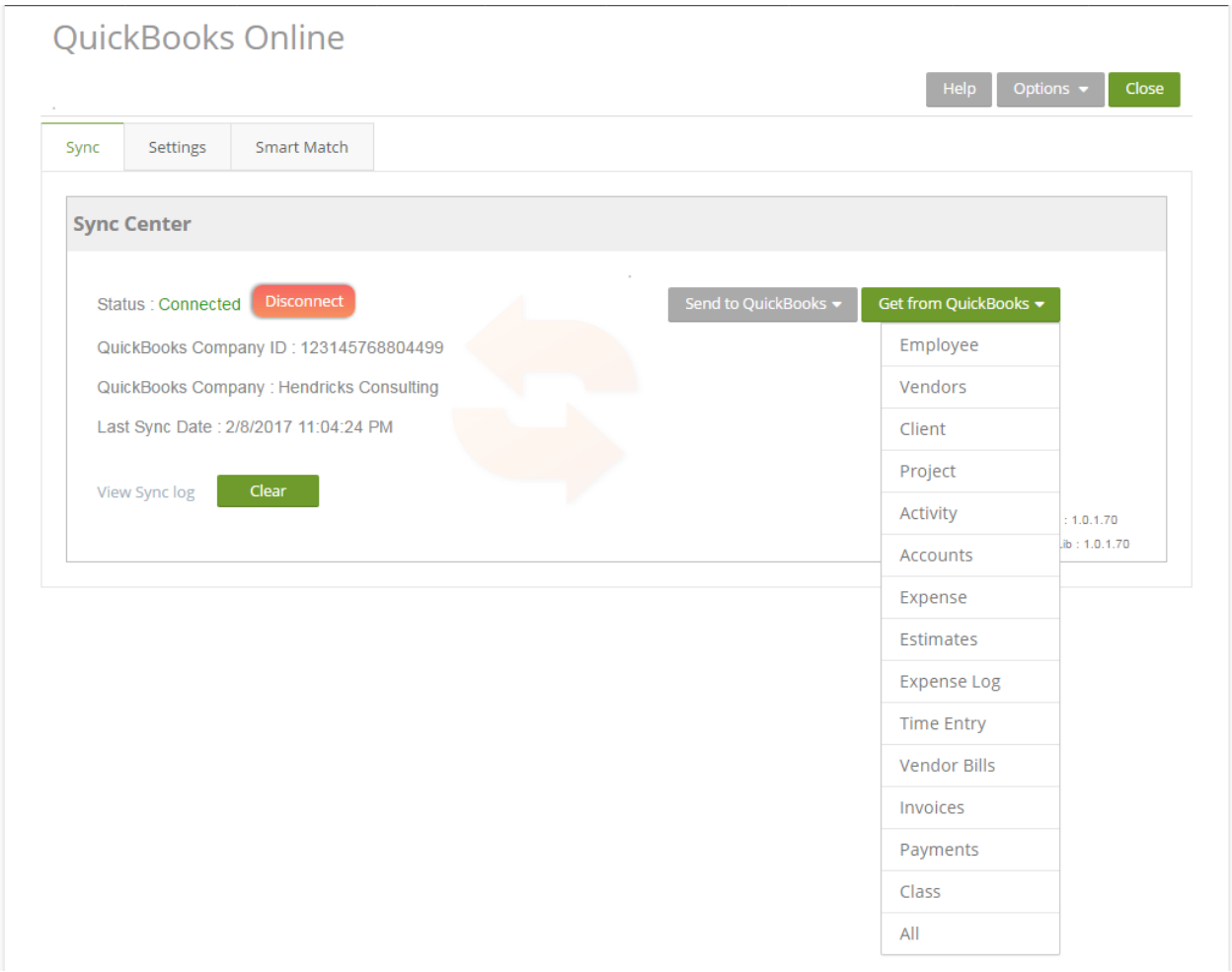
You only need to decide whether to get each type of QuickBooks Online data to BillQuick Online. If you want to restrict what data records transfer from QuickBooks Online, choose one or more filters.

4. Click the Save button to save the synchronization settings and then close the screen.

3. Get Data

Now you are ready to transfer data from QuickBooks Online to BillQuick Online.

1. On the Sync Center, select Get from QuickBooks.



2. Select a module from the list, starting with Employee. After the progress bar indicates that the transfer is complete, open the corresponding screens in both BillQuick Online and QuickBooks Online to verify whether the data synchronization is complete. See Quick-Check for more information.

If you are a new BillQuick Online user and initiate the first data synchronization from QuickBooks Online, the automatic synchronization process does not transfer time entries. It only gets master information like employees, vendors, accounts, customers, etc. into BillQuick Online. Project data is transferred from QuickBooks Online only if Customer record is tagged as 'Is sub-customer' in its Customer Information screen while time entries will be associated with projects only if the 'Bill this customer' option is checked on that screen.

Scenario 2: New BillQuick Online-New QuickBooks Online User

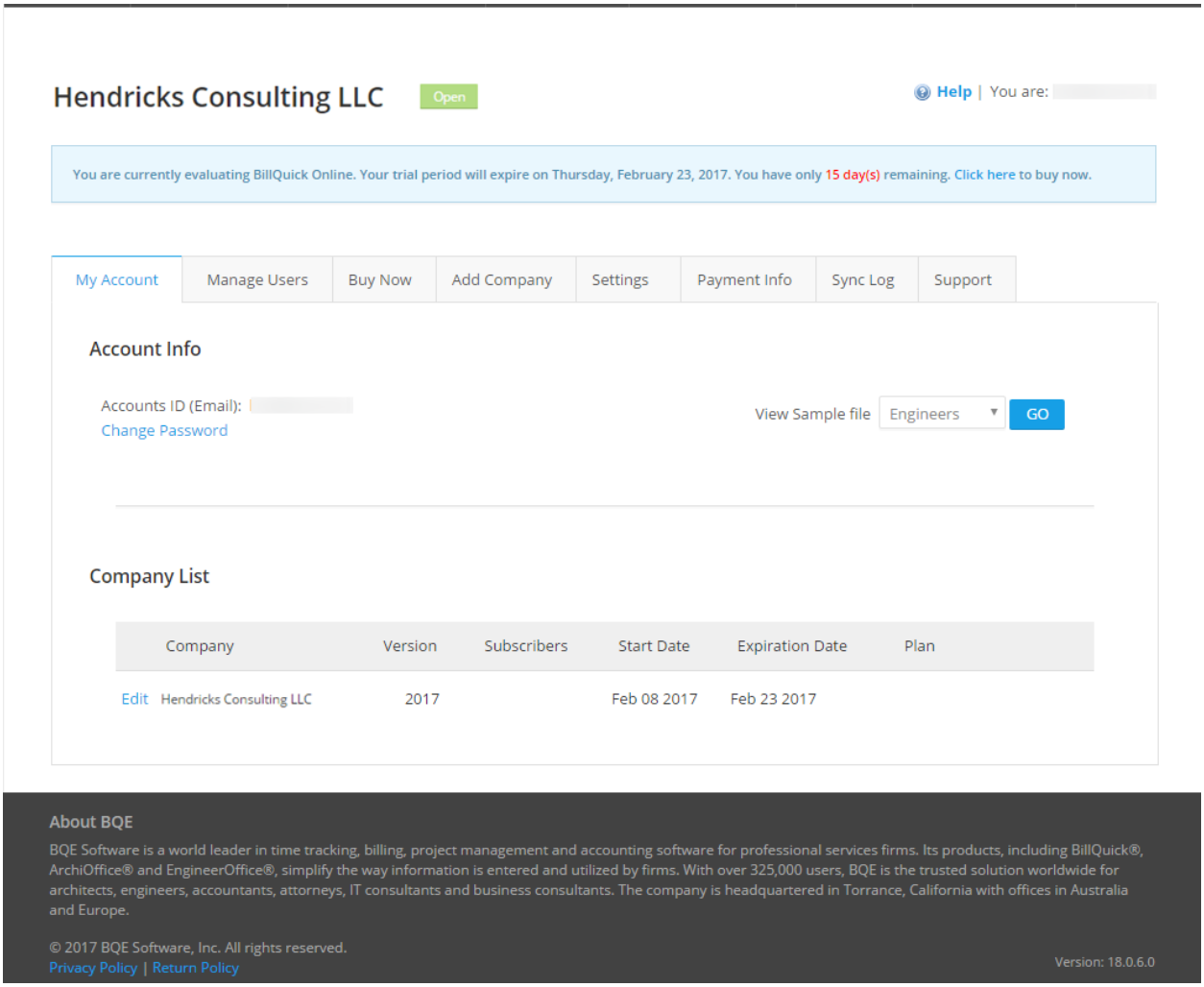
If you are new to both BillQuick Online and QuickBooks Online, you must first set up new databases in both programs for your company, enter or import master information in BillQuick Online and then sync the data. The instructions below cover these tasks.

Most data can be set up in BillQuick Online, however, Chart of Accounts, services and inventory items are best set up in QuickBooks Online and then transferred to BillQuick Online. After data setup is done, you can sync data from BillQuick Online to QuickBooks Online.

Before syncing data, you must have security permissions in BillQuick Online or be an Admin user to do so.

1. Create the BillQuick Online Company Database

When you sign up for a BillQuick Online account, a company database is created using the company name you provided. Also, you can choose an industry type in the signup process which sets the BillQuick Online company file for that industry. However, when you want to add another company to your BillQuick Online account, you can do so from its Add Company tab. You have to purchase separate licenses for users in each company.



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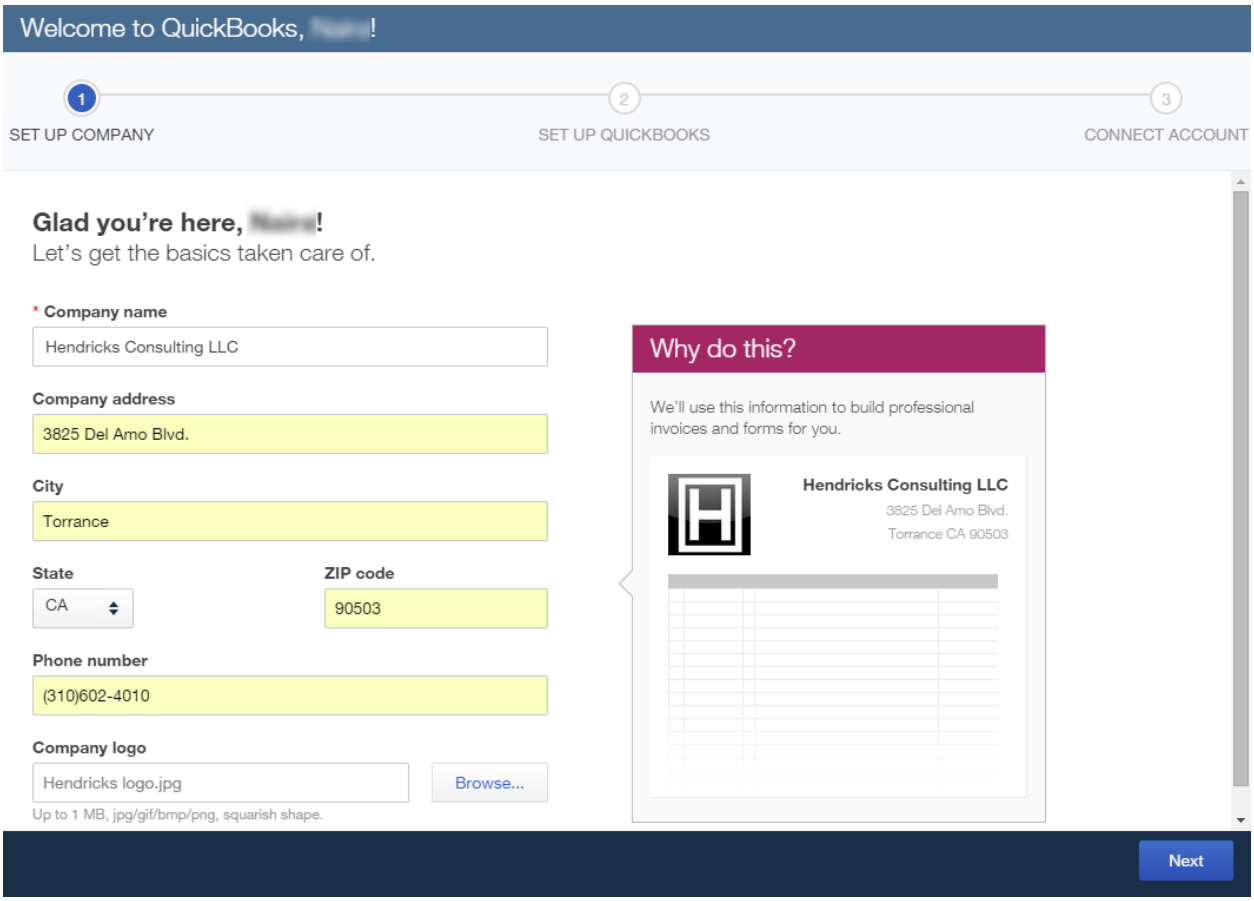
To learn more on creating a BillQuick Online company database, check [BillQuick Online Getting Started Guide](#).

2. Create the QuickBooks Online Database

Before integrating data, a new QuickBooks Online user must create a new database there and authorize

BillQuick Online to access it.

1. Sign in to your QuickBooks Online account through BillQuick Online or Intuit. If you do not have an account with QuickBooks Online, sign up for a new one. Choose the edition of QuickBooks Online you want to register (Simple Start, Essentials or Plus). You can use a trial QuickBooks Online account if you want to complete the first-time integration.



2. Complete the QuickBooks Online setup interview. Intuit uses it to determine your needs and helps you set up QuickBooks Online quickly.

3. Set up your preferences and online company by following the on-screen prompts. For example, click Payroll and begin entering your payroll data if you want QuickBooks Online to handle your payroll.

Employee data cannot be sent from BillQuick Online if the Payroll option is on in QuickBooks Online. You can manually enter the employee information in both programs and then use Smart Match to link them.

2. Specify Sync Settings

Specifying synchronization settings is necessary to define which data should be transferred.

1. In BillQuick Online, select Home > QuickBooks Online > Settings tab.

See the *Integration Settings* section for more information.

2. On the left side of the screen is a list of BillQuick Online modules. You can set various filters and other synchronization options based on the selected module. As we want to transfer data from BillQuick Online to QuickBooks Online, ensure that the modules are selected from the Send Settings list. *See Send Settings for more information.*

You only need to decide whether to send each type of BillQuick Online data to QuickBooks Online. If you want to restrict what data records transfer to QuickBooks Online, choose one or more filters.

3. Click Account Assignment and select the default accounts for BillQuick Online items prior to data transfer. (*See QuickBooks Online Accounts for more.*)

4. Next, specify other synchronization settings:

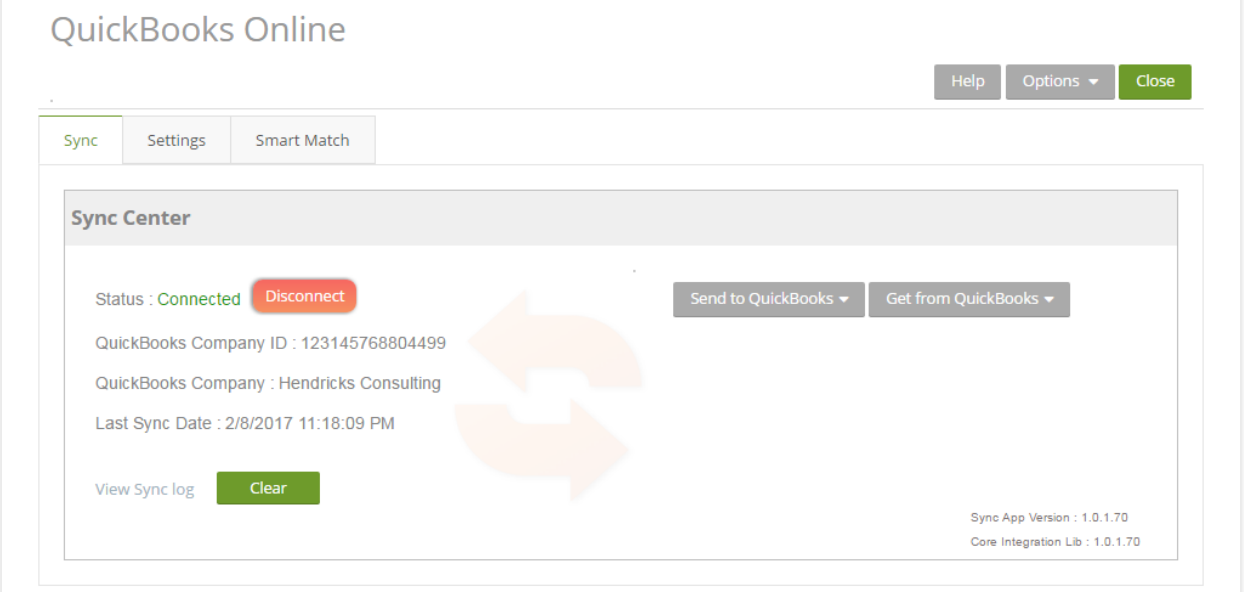
    - Assign accounts to BillQuick Online invoice items (see Invoices for more information).
    - Assign classes to BillQuick Online items (see Assign Class for more information).

5. Click Save and then close the screen.

3. Send Data

Now you are ready to send data from BillQuick Online to QuickBooks Online.

1. In BillQuick Online, select Home > QuickBooks Online > Sync Center and click Send to QuickBooks.



2. In turn, select each item from the list, starting with Employee.

Employee data cannot be sent from BillQuick Online if the Payroll option is on in QuickBooks Online. You can manually enter the employee information in both programs and then use Smart Match to link them.

3. After the progress bar indicates that the transfer is complete, open the corresponding screens in both BillQuick Online and QuickBooks Online to verify whether the data is accurate. *See Quick-Check for more information.*

Repeat this step for the next item.

Sending Time Entries from BillQuick Online to QuickBooks Online

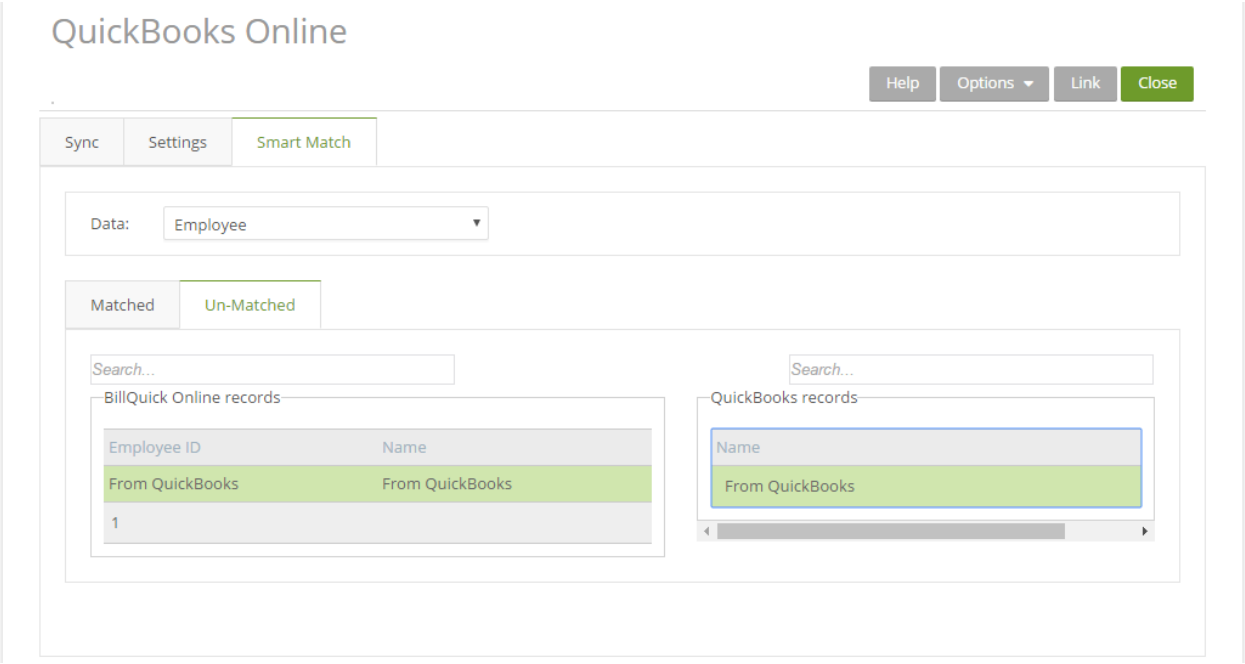
To sync time entries between BillQuick Online and QuickBooks Online, you have to first enable time tracking in QuickBooks Online.

1. In QuickBooks Online, turn on time tracking from Settings > Company settings > Advanced > Time tracking. *See Time Tracking in QuickBooks Online for detailed steps.*

2. If you are using the payroll option in QuickBooks Online, you must have already added the employees there using Employees > Add employee.

3. In BillQuick Online, go to Home > QuickBooks Online > Sync tab and click Send to QuickBooks.

4. Make sure all the data before the Time Entry option is already synced, especially employees. If all the employees are not in sync, you can use the Smart Match option to manually link the un-matched records.



5. On the Smart Match tab, select Employee from the Data drop-down list and then click the Un-Matched tab. This will show a list of un-matched employees between the two programs.
6. Select the employees to be linked and click Link. Close the screen.
7. Next, make some time entries in BillQuick Online for any employee.
8. Now go back to the Sync tab and send the time entries using the Send to QuickBooks> Time Entry option.
9. You can verify the synced entry in QuickBooks Online by clicking + and selecting Weekly Timesheet.

For any assistance, contact BQE Support at (310) 602-4030 or support@bqe.com.

QUICK-CHECK

After data synchronization between two programs, a best practice is to verify each data type transferred. This ensures that your information is accurate and complete.

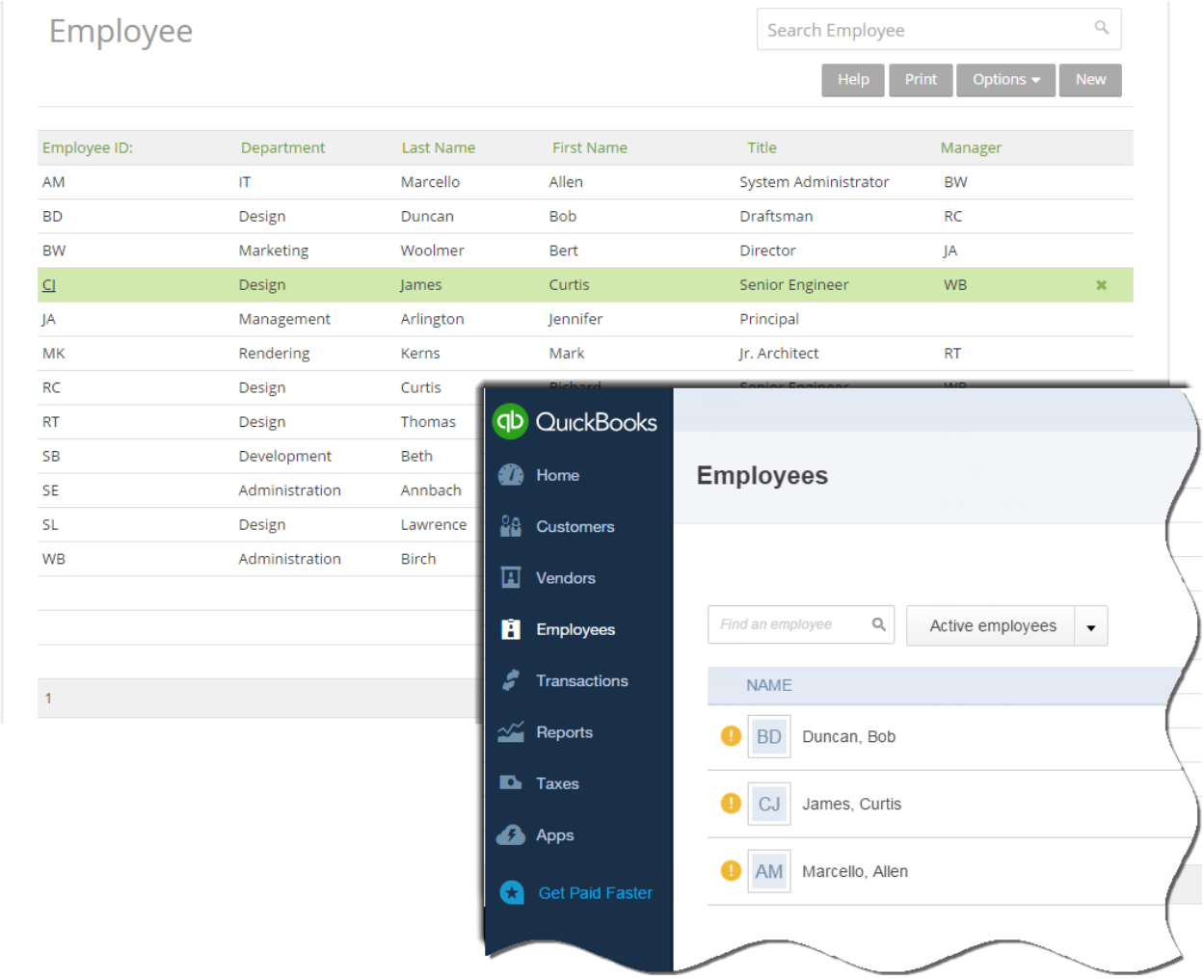
BillQuick Online creates a Sync Log that lists all the records that were transferred *from* and *to* QuickBooks Online. This log file contains information such as month and year of synchronization. To verify synced data, follow the instructions below.

1. Check Employees

Check the employee data that exists in BillQuick Online and QuickBooks Online to ensure that data transfer has occurred as planned.

Before entering time records or transferring time records from QuickBooks Online, review each employee record in BillQuick Online to make sure the Bill Rate and Cost Rate is correct. In addition, if special bill rates (and special cost rates) apply to work done by employees on a project, be sure to define an appropriate Service Fee Schedule and assign it to related projects before entering or transferring time records. BillQuick Online uses these rates to calculate the bill and cost amount of time records.

1. In QuickBooks Online, select Employees from the sidebar.



2. In BillQuick Online, select Employee from the Lists menu.

3. Switch between the programs, selecting the same employee in both screens and check whether the synced data is correct. You can also run reports to see if the data is complete and accurate.

2. Check Vendors

Repeat the above process for vendor data.

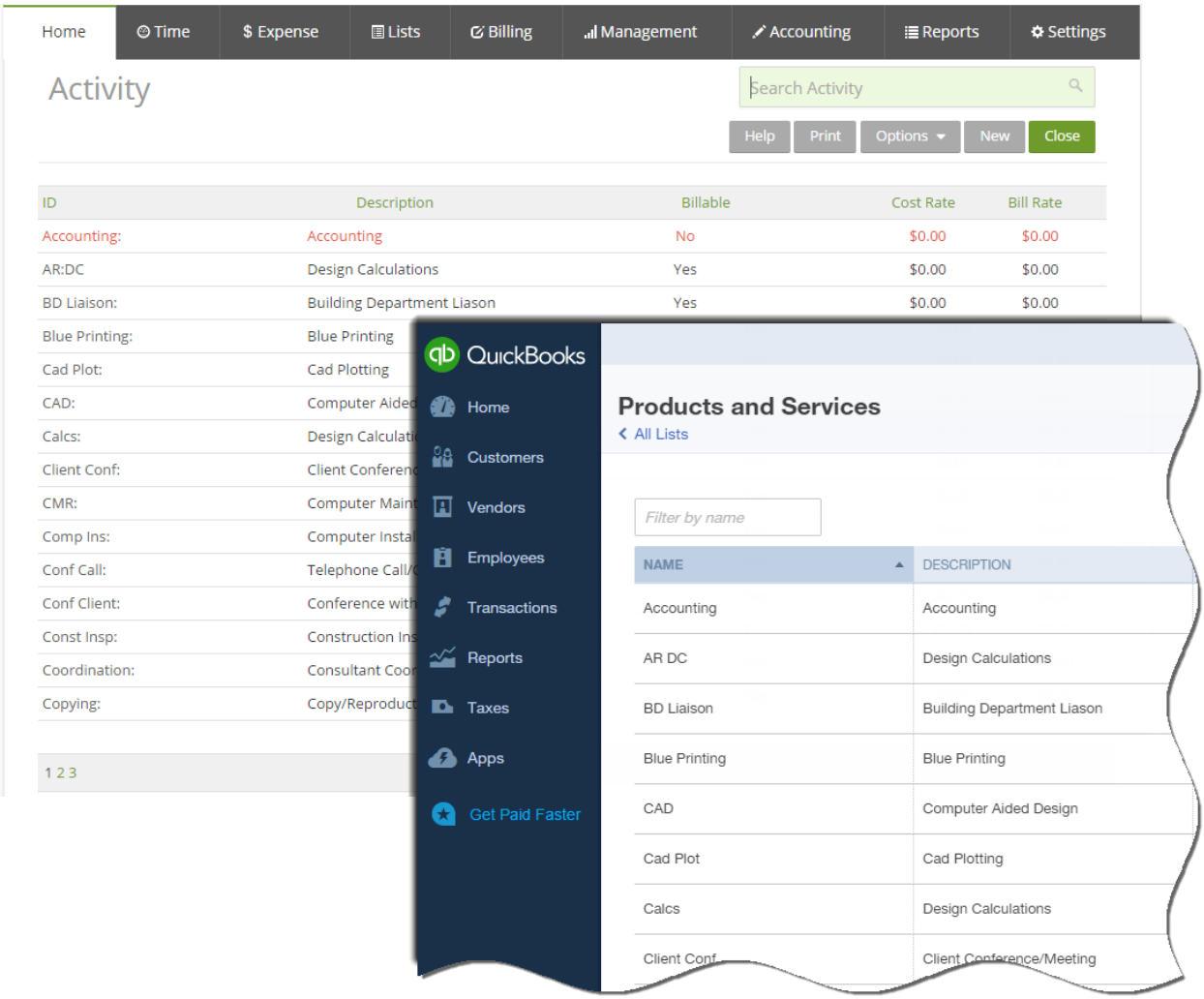
1. In QuickBooks Online, select Vendors from the sidebar.
2. In BillQuick Online, select the Lists menu > Vendor.
3. Compare the vendor list in both screens. You can also run reports to see if the data is complete and accurate.

If you enter time records for vendors (subcontractor or consultants) in BillQuick Online, be sure to change the Bill Rate and Cost Rate. When transferred from QuickBooks Online, BillQuick Online inserts $0 as placeholder values in vendor records.

3. Check Activity and Expense Items

Repeat the above process for activities and expenses.

1. In QuickBooks Online, select Lists > Products and Services.



2. In BillQuick Online, select Lists > Activity (or Expense).

3. Compare the activity list (or expense list) in both screens. You can also run reports to see if the data is complete and accurate.

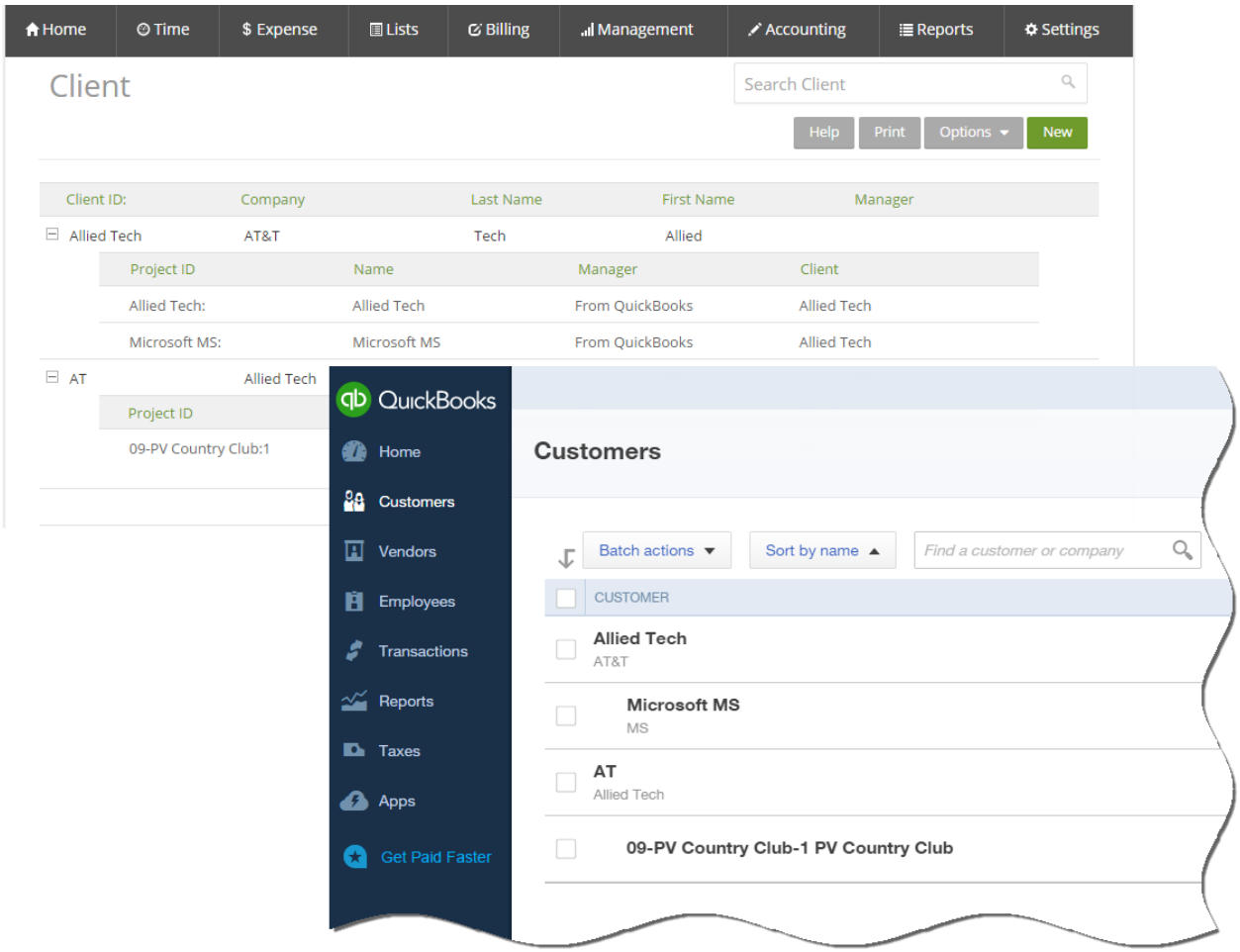
4. Check Clients/Customers

Repeat the above process for client data.

1. In QuickBooks Online, select Customers from the sidebar.

2. In BillQuick Online, select Lists > Client.

3. Compare the client list in both screens. You can also run reports to see if the data is complete and accurate.

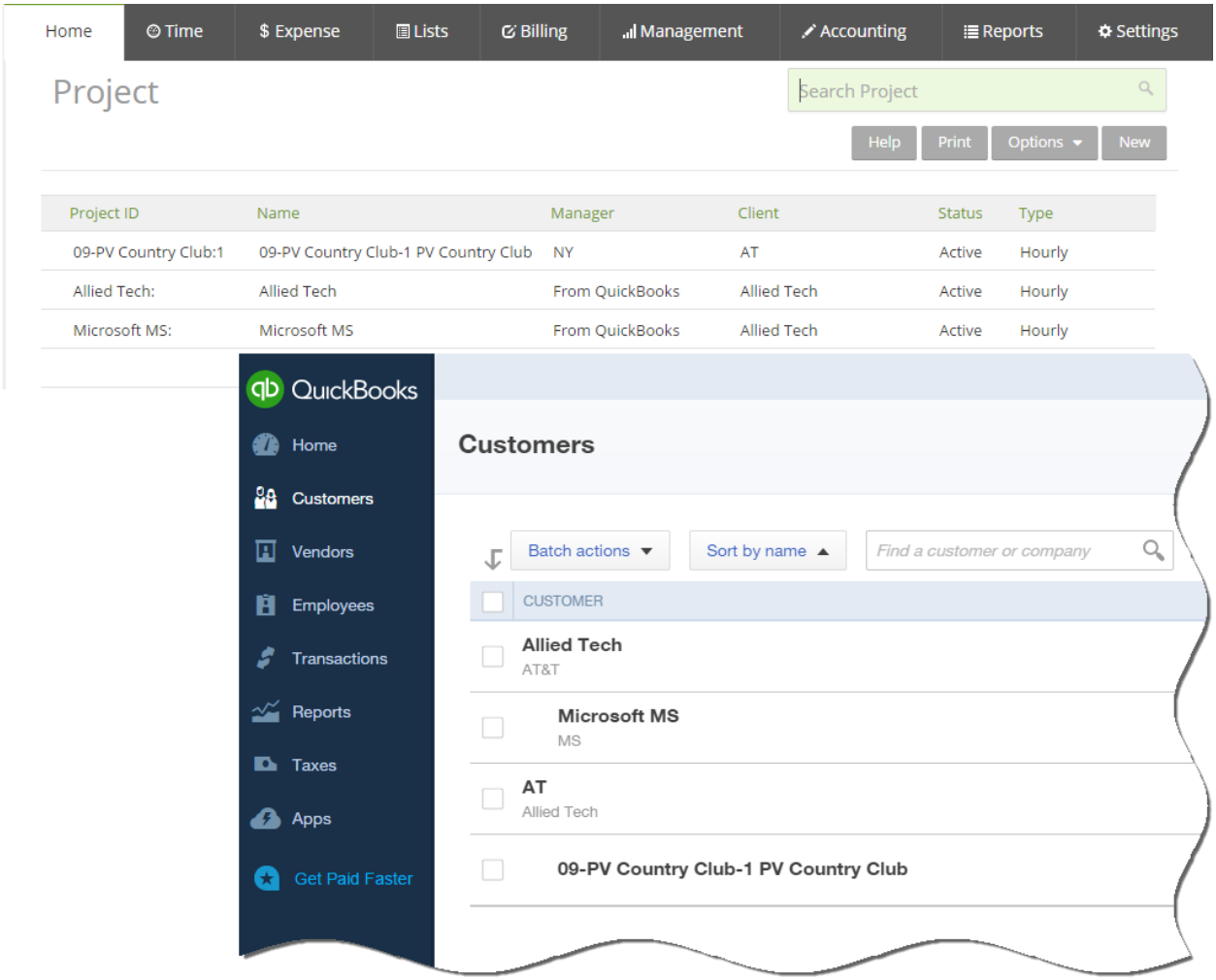


5. Check Projects/Sub-Customers

Repeat the above process for project data.

1. In QuickBooks Online, select Customers from the sidebar.
2. In BillQuick Online, select Lists > Project.
3. Compare the project list in both screens. You can also run reports to see if the data is complete and accurate.

Project data is transferred from QuickBooks Online only if a Customer record is tagged as 'Is sub-customer' in its Customer Information screen while time entries will be associated with projects only if the 'Bill this customer' option is checked on that screen.

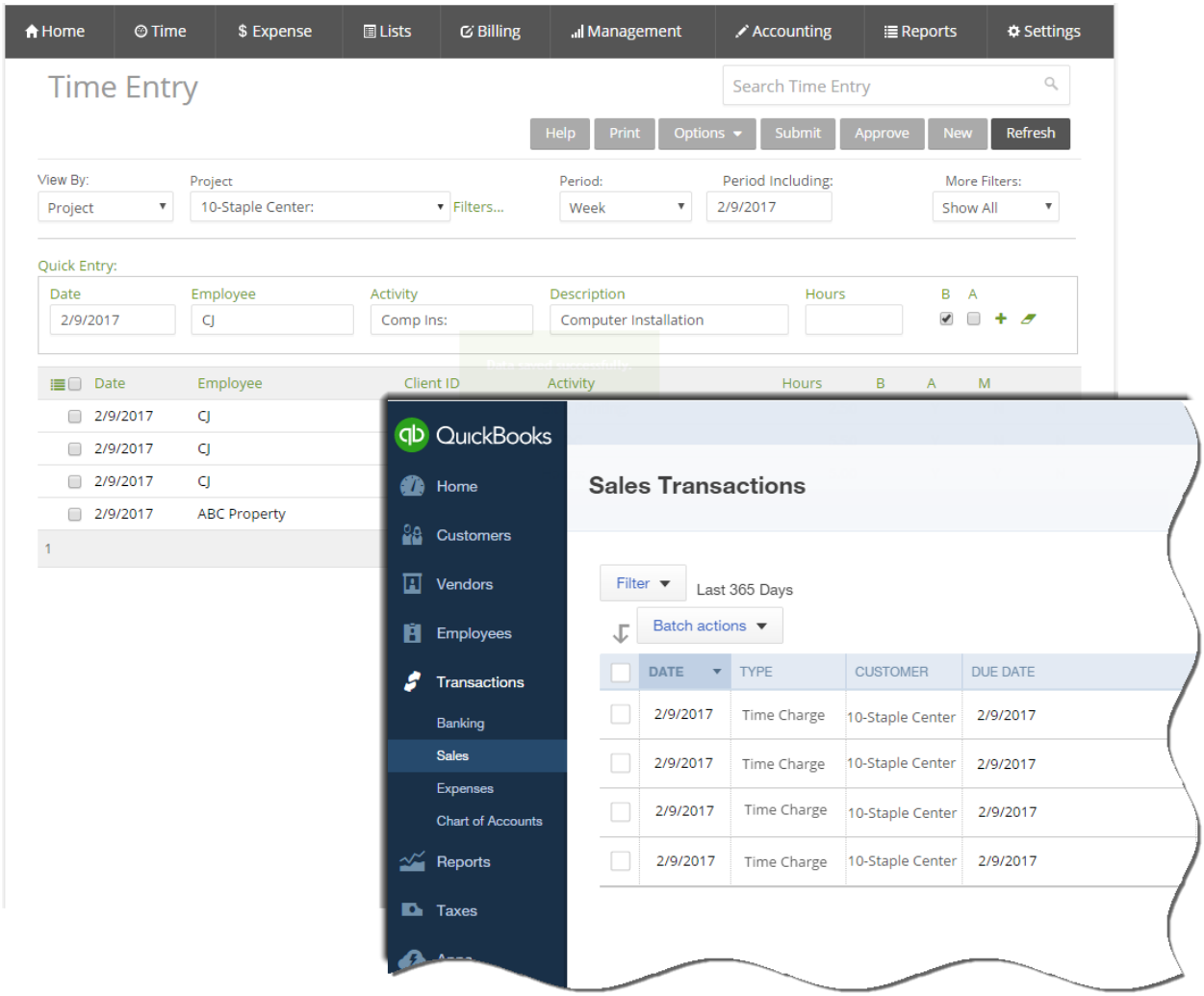


6. Check Time/Expense Entries

Repeat the above process for time entries.

1. In QuickBooks Online, select Transactions > Sales from the sidebar.
2. In BillQuick Online, select Time > Time Entry.
3. Compare the time entries in both screens. You can also run reports to see if the data is complete and accurate.

QuickBooks Online time entries will be associated with projects only if the 'Is sub-customer' and 'Bill this customer' options are checked on the Customer Information screen.



Repeat the above process for expense entries.

In QuickBooks Online, select Transactions > Expenses from the sidebar. In BillQuick Online, select Expense > Expense Log. Compare the expenses entries in both screens.

Congratulations! You now have an understanding of data integration between BillQuick Online and QuickBooks Online.

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