

# Succeed 2017

## A BillQuick-QuickBooks Integration Deep Dive



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# Background

- 17 years of integration experience
- BQE integrates with QB desktop and QB online
- Seamless bi-directional integration
- Follow the NED2 mantra

# What We Will Learn

- How can I automate the sync process?
- Do I send detailed or summarized invoices?
- When do I need to send time entries?
- I am running BQ & QB independently. What are my options?

# Automate The Sync Process

- On-demand: Send All - Get All
- Auto sync schedule
- Auto pilot integration - using real-time sync

# On-Demand Sync

The screenshot shows the 'Integration' menu with 'Send to QuickBooks' selected. A secondary menu lists data types to sync, including Employee, Vendors, Client, Project, Accounts, Activity, Expense, Time Entry, Vendor Bills, Invoices, Payments, and Class. A red arrow points down the list, and a red box highlights the 'All' option at the bottom. A callout box contains the text: 'Send in the order Presented. Master Information first before transactional data'.

Integration Accounting Add-Ons Window Help

- QuickBooks Sync Settings
- Send to QuickBooks
  - Employee
  - Vendors
  - Client
  - Project
  - Accounts
  - Activity
  - Expense
  - Time Entry
  - Vendor Bills
  - Invoices
  - Payments
  - Class
  - All
- Get from QuickBooks
- QuickBooks Integration Wizard
- QuickBooks Smart Match
- QuickBooks Sync Reports
- Ask before Delete
- Connect in Single User Mode
- Real-Time Sync With QuickBooks
- About QuickBooks

Send in the order Presented.  
Master Information first  
before transactional data

# Auto Sync Schedule

The screenshot displays the software's settings menu. At the top, a navigation bar includes 'Edit', 'View', 'Project', 'Time-Expense', 'Billing', 'Reports', 'Settings', 'Utilities', 'Integration', 'Accounting', and 'Add-Ons'. The 'Settings' menu is open, showing a 'Navigator' with 'Global Settings' selected. Below the navigator are icons for 'Help', 'Restore', 'Save', and 'Close'. A sidebar on the left lists various settings categories: 'Master Information', 'Time & Expense', 'Billing', 'Templates', 'Accounting', 'Integration' (highlighted with a red box), 'Taxes', 'Folders', 'User Interface', 'Email Settings', 'Merchant', and 'Security'. The main content area is titled 'Sync Reminder:' and features a dropdown menu set to 'QuickBooks'. Below this are five radio button options: 'Weekly On:' (with a date picker), 'Monthly On Day:' (with a day selector), 'On Exit' (selected), 'On Startup', 'Daily', and 'Never'. At the bottom, there are three unchecked checkboxes: 'Delete Records in QuickBooks When Deleted in BillQuick', 'Include Purchase Tax Amount When Sending Expenses to QuickBooks', and 'Include Purchase Tax Amount When Sending Vendor Bills to QuickBooks'. The final line reads 'Accounting Software I Use: QuickBooks' with a dropdown arrow.

Edit View Project Time-Expense Billing Reports **Settings** Utilities Integration Accounting Add-Ons

Navigator Global Settings ✕

Help Restore Save Close

Master Information  
Time & Expense  
Billing  
Templates  
Accounting  
**Integration**  
Taxes  
Folders  
User Interface  
Email Settings  
Merchant  
Security

Sync Reminder:  
QuickBooks

Weekly On:   
 Monthly On Day:   
 On Exit  
 On Startup  
 Daily  
 Never

Delete Records in QuickBooks When Deleted in BillQuick  
 Include Purchase Tax Amount When Sending Expenses to QuickBooks  
 Include Purchase Tax Amount When Sending Vendor Bills to QuickBooks

Accounting Software I Use: QuickBooks

# Real-Time Sync

The screenshot shows the 'Integration' menu in the BQE Core software. The 'Integration' menu is highlighted with a red box. The 'QuickBooks' option is selected and highlighted with a green background. A red arrow points from the 'QuickBooks' option to the 'Real-Time Synchronization with QuickBooks' option in the submenu. The 'Real-Time Synchronization with QuickBooks' option is highlighted with a red border and a green checkmark. The submenu also includes options like 'Sync Settings', 'Send to QuickBooks', 'Get from QuickBooks', 'QuickBooks Integration Wizard', 'QuickBooks Smart Match', 'QuickBooks Sync Reports', 'Ask before Delete', 'Connect in Single User Mode', and 'About QuickBooks'.

Menu Item	Submenu Item
Integration	QuickBooks
Accounting	
Add-Ons	
Window	
Help	
QuickBooks	Sync Settings
Sage 50	Send to QuickBooks
MYOB	Get from QuickBooks
Export Invoices to Xero	QuickBooks Integration Wizard
	QuickBooks Smart Match
	QuickBooks Sync Reports
	Ask before Delete
	Connect in Single User Mode
	Real-Time Synchronization with QuickBooks
	About QuickBooks

# When Do You Send Detailed Invoice?

- Income needs to post to multiple accounts
- Usually time & material jobs
- Sync uses accounts assigned to items
- Items transferred from QB to BQ ***DO NOT*** need account assignment



# When Do You Send Summarized Invoice?

- Income needs to post to single account
- Usually fixed fee jobs
- Sync uses default accounts assigned to invoice service and expense items
- Use project accounts for override

# When Do You Send Timesheets To QB?

- Only if you are using QB payroll service
- Detailed invoice does not require time
- Payroll settings to feed multiple payroll items

# Is It Too Late To Integrate?

- Smart match for linking unlinked records
- Make use of date filters
- Ask BQE experts

# What We Learned

- Automate syncing process
- Take full advantage of robust sync settings
- Don't bloat QB by sending unnecessary data
- It is never too late to start the integration
- Ask for BQE expert help

# Q & A





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