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

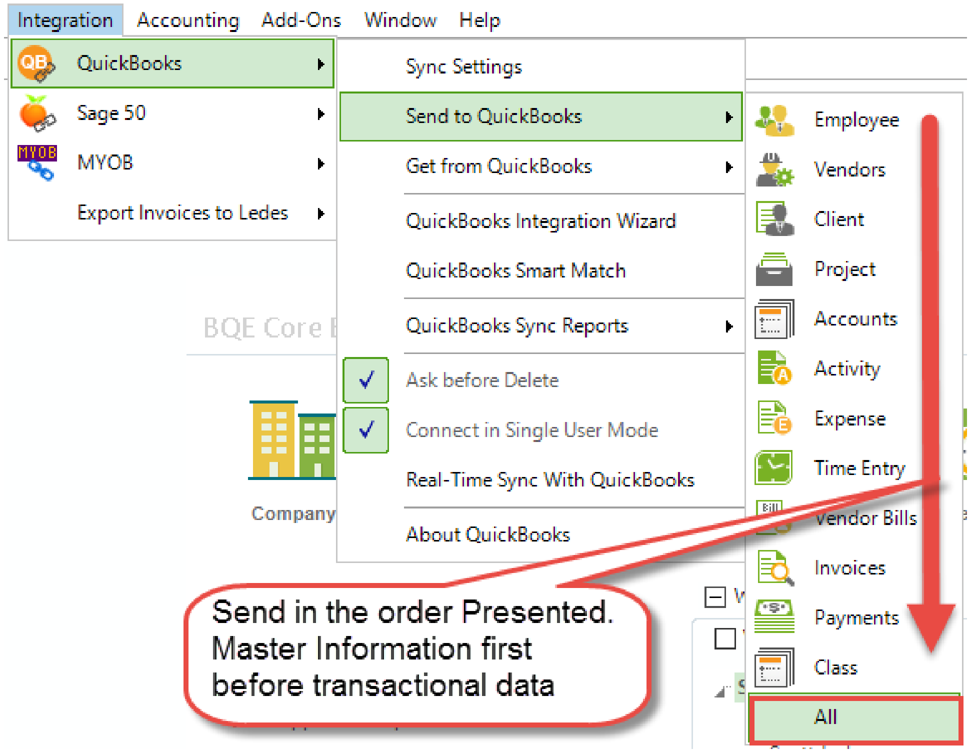
What We Will Learn

- 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?

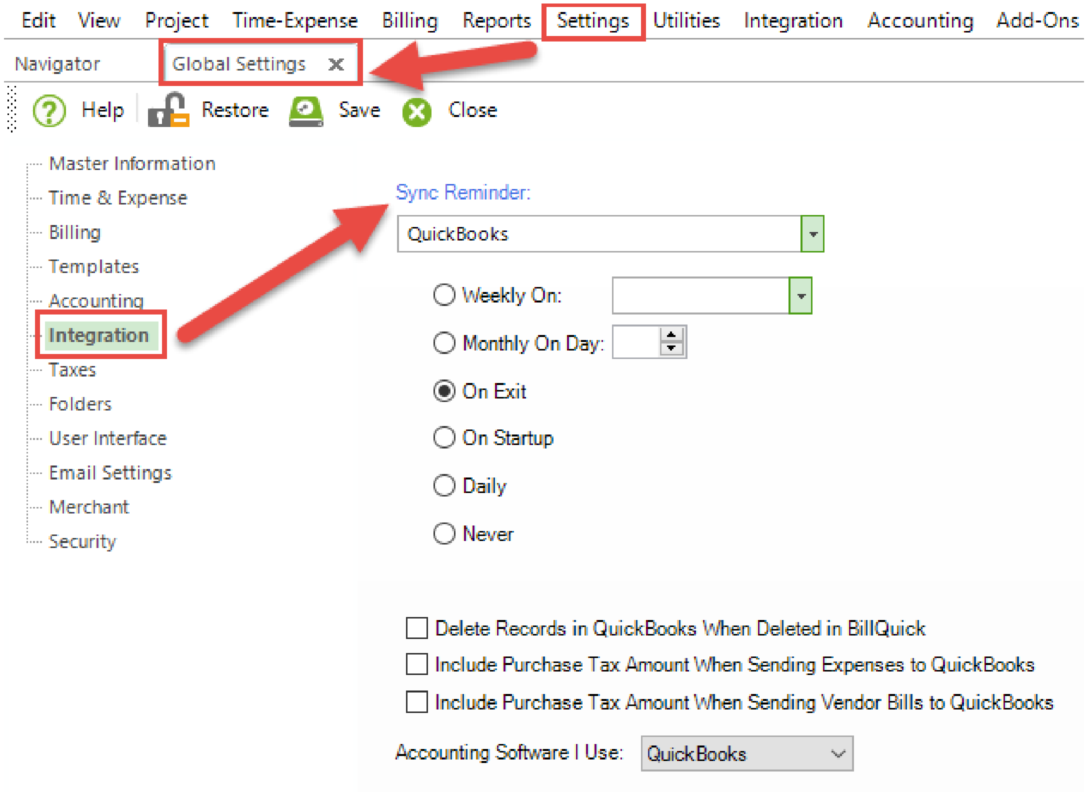
Automate The Sync Process

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

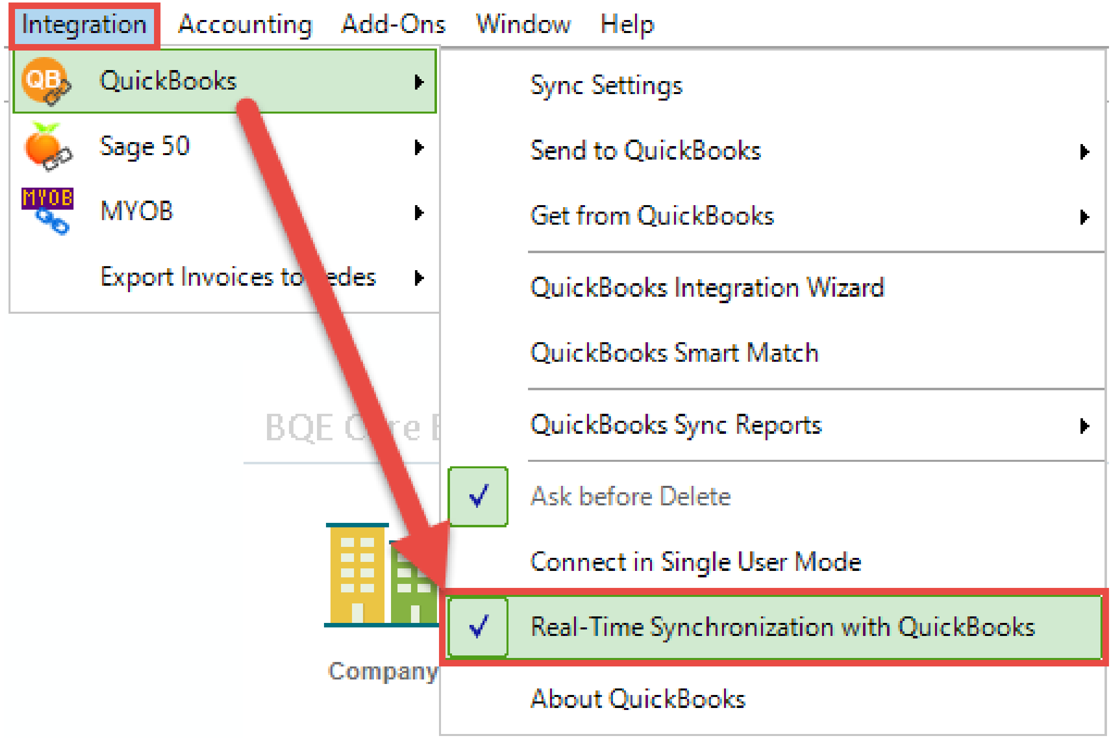
On-Demand Sync



Auto Sync Schedule



Real-Time Sync



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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