Product Information

BillQuick

TOP NEW FEATURES IN 2013

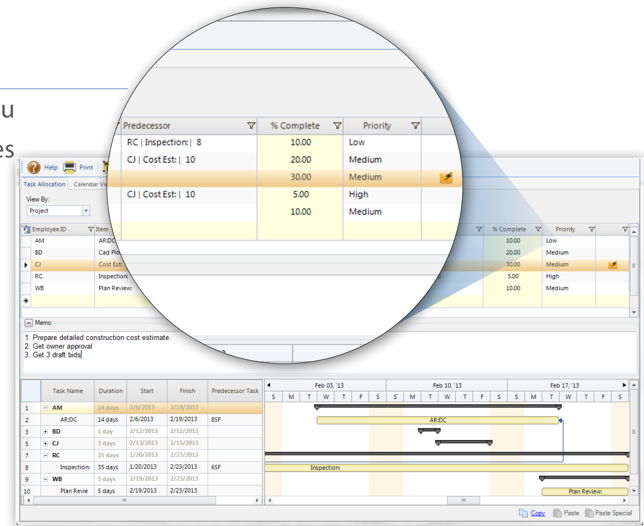
Schedule Resources with Ease

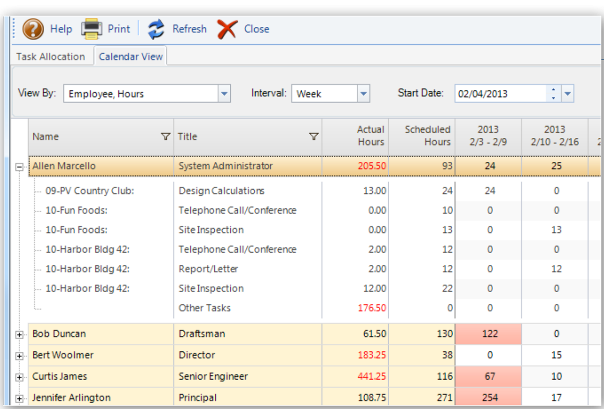
• Task Allocation Made Simple *(P/E)*

Scheduling project teams just got a lot easier for managers. Now you have the ability to create parent and dependent tasks, which ensures that dependent tasks are automatically rescheduled if the parent task gets delayed. For each task, you can also:

- Update the percentage complete
- Prioritize tasks
- Assign a custom descriptions and record detailed memos
- Drag, drop and stretch them on an interactive Gantt Chart

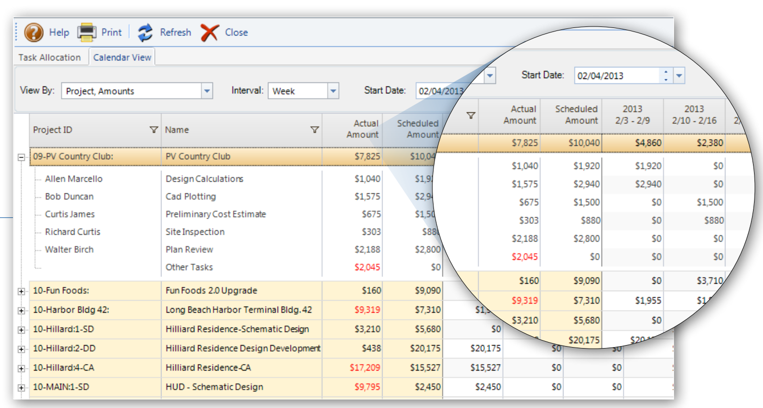
To help schedule work for employees quickly, we've also added a handy task duplication feature that simply copies tasks from last month to this month.





• Employee Workload Forecaster *(P/E)*

See the assignments for each employee in a beautiful color-coded calendar view and instantly determine which team members are overextended or under-utilized. Keep an eye on not only your forecasted work, but also who is available to work on your next project.



• Revenue Forecaster *(P/E)*

Using the information entered into the Workload Forecaster, BillQuick can calculate your anticipated revenue so you can plan accordingly. You can even choose to forecast by Project, Hours, Project Amount, or Employee.

B - Basic, P - Pro, E - Enterprise only feature, + indicates features available only in BillQuick Plus Accounting

Save Time with Automation

- **Create Time Entries From To-Do Items** ***(P/E)***
  Update a project related To-Do item and BillQuick 2013 will offer you the option to make a time entry related to the update, which eliminates the inefficiency of double-entry, and makes sure your billable time never slips through the cracks.
- **Optional Automatic Attachment of Related Documents to Emails** ***(P/E)***
  We know you frequently need to include contracts, non-disclosure agreements, confirmations, engagement letters and other documents when you email proposed project estimates to prospects. BillQuick 2013 makes this a piece of cake by giving you the option to include all files linked to a record when you choose to email an estimate.
- **Automatic Check Generation** ***(B+/P+/E+)***
  Refund a client retainer, and BillQuick 2013 automatically prepares the refund check for you.
- **Automatic Billing** ***(P/E)***
  Improve your cash flow with this "Set it and Forget it" feature that gives you the ability to bill any project automatically on a specified frequency so you can expect to receive more frequent payments with less effort, without even having to remember to bill.

Manage Projects and Clients with Ease

- **Custom Cloning** ***(B/P/E)***
  Never start from scratch again—clone projects and important elements like To-Do Lists, Sub-Projects, Rules and more can be copied so you can create new jobs in seconds, just the way you want.
- **Streamlined Visibility for Project Managers** ***(B/P/E)***
  This new Security option saves project managers the effort of sifting through data by giving them the ability to view time and expense data for only the projects they're personally managing.
- **Snap-Shot Analytics for Projects** ***(B/P/E)***
  Compare past project performances to your current jobs with ease by applying date filters to further narrow down the snap-shot information available on the Project screen and in the Project Center.
- **Easy Multiple Client Merging** ***(E)***
  Just as you can merge projects, now you can merge multiple clients into one. BillQuick 2013 will automatically roll up the related projects, invoices and payments.

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Never Miss a Deadline with Alerts and Notifications

- **Due Date Alerts *(E)***
  Never miss a deadline again—BillQuick 2013 scans the due dates for all active projects and notifies managers several days in advance, eradicating those stressful surprises from your work week.
- **Invoice Approval Notifications *(P/E)***
  Cash flow is easily improved by sending client invoices out as soon as they're approved by a manager. BillQuick 2013 emails you an immediate notification when your draft invoices get approved, so no time is wasted between working and getting paid. Vendor Bills and Purchase Orders also now have this capability.
- **Easily Track Schedules in Real-Time *(E)***
  WDevelop project schedules and track them in real-time effortlessly with automatic notifications. Get informed when tasks are updated, subscribe to the changes in tasks, and keep your team in the loop by making sure they receive automatic notifications too.

Stay Organized with Smart Reports and Invoices

- **New and Redesigned Reports *(B/P/E)***
  We've not only added 20 new reports to keep you tuned in to all aspects of your business, we've also redesigned dozens of others. Keep track of even more data with new reports like: Cash-Based Trial Balance, Paid Time & Expense, A/R Reconciliation Summary, Payment Journal with Disbursements, Invoiced Time & Expense and many more.
- **Custom Fields on Invoices *(E)***
  IUse these fields to track more information than ever. Include a revenue category, and easily gauge what the invoice revenue is being tracked against. BillQuick 2013 includes three new customizable fields, with editable captions. Not only can you customize the names of these fields, you can also change the user interface and assign your own drop-down value lists.
- **Print Filtered Information *(B/P/E)***
  BillQuick started with the best filters in the industry and made them even better to help you print project lists with your on-screen filters automatically applied. Do less visual scanning to get a crystal-clear picture of what's going on in your business.
- **Change Grouping of Reports On-The-Fly *(B/P/E)***
  You may prefer to run the Unbilled Time and Expense Report by Project Manager, or by Client, or by Project. Now you can change the organization of reports on the fly, with no need for customization, thanks to a newly added filter panel.

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Stay Organized with Smart Reports and Invoices, Continued

- **Print Entire Collection History** ***(P/E)***
  Keep your principals and managers updated about collection efforts and the status of open invoices by using the new Aging Report that can print all previous collection notes below each open invoice.
- **Keep Private Memorized Reports** ***(B/P/E)***
  With everyone adding to the list of memorized reports, the list can sometimes become long and difficult to navigate. BillQuick 2013 allows you to mark your memorized reports as "Private", which not only keeps the overall list of such reports short, but also ensures that sensitive reports are hidden from others.
- **Easily Monitor Unpaid Retainers** ***(B/P/E)***
  Save time by viewing unpaid retainers right from the Project screen or the Project Center without having to run Retainer Aging reports each time, and make sure you collect what's due to you.
- **Attach Files to Payments Received** ***(E)***
  Stay organized by attaching copies of checks or wire transfers you've received to your payment record. Attach as many as you'd like, and rest assured that they're all in one safe, easy-to-find place.

Take Control of Your Details

- **Adjust Account Numbers Universally** ***(B/P/E)***
  In a two-click process, you can change financial account numbers and have that adjustment apply to all transactions.
- **Batch Print Deposit Slips** ***(B+/P+/E+)***
  As soon as you finish a deposit transaction, BillQuick immediately makes the related deposit slips available for printing or emailing. However, if you prefer to wait and print a batch of deposit slips for the whole month, you can easily do that too with the simple select-and-print functionality added in 2013.
- **View GST/VAT Amounts per Time and Expense Entry** ***(P/E)***
  Easily view the tax amount related to each time and expense entry in Sheet View or the Expense Log, and know the total billable value of your time and expense data at a glance.

To learn more about BillQuick 2013 and your personal upgrade pricing, contact your Account Manager at (855) 219-8404.

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