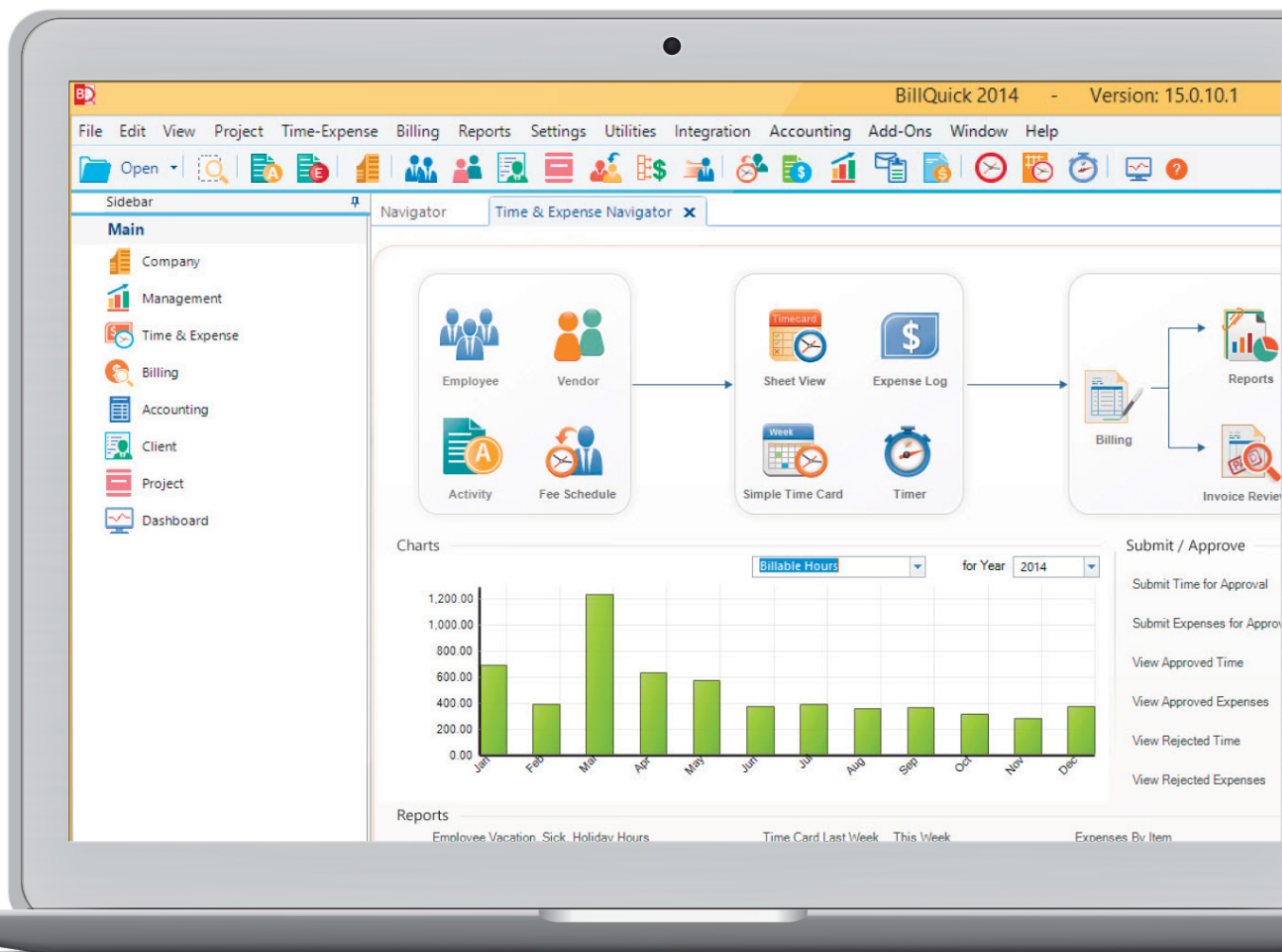Simple | Streamlined | Sophisticated

bqe BillQuick 2014

Simple | Streamlined | Sophisticated

BillQuick 2014 takes a giant leap forward in **simplifying** your software experience and your business. We have **streamlined** many of the most commonly used processes saving you time to focus on other areas of your business. We've also created some incredibly **sophisticated** algorithms that will allow you to understand not only where your business is, but where it's going.

Smart Scheduling and Forecasting

Distributed View
(P,E with SQL backend)

The new Distributed View instantly spreads the assigned tasks in equal hourly segments across the designated schedule. It's a brilliant way to quickly assess the workload for your employees.

Smart View (P,E)

The new Smart View looks at all the tasks for your employees and uses sophisticated algorithms to intelligently complete each task at the ealiest possible date while respecting all of the other tasks and the employees work-week.

Project Specific Revenue Forecasting (P,E)

We have enhanced the algorithm used to forecast revenue to incorporate Project Fee schedules. This powerful features takes full advantage of the new Smart Scheduling feature giving your business managers a powerful tool for accurate revenue projections for any desired time period.

Enhanced Budget Control

Budget with Real-Time Spent information (P,E)

We've added two new columns to help you with your project budgeting. The Actual Cost and Actual Amount values will update in real-time showing you how much of your cost and billing budget have been spent and what is remaining. No longer do you need to visit other screens or run reports to know where you stand on each budget line item making your job easier and much faster

Automatic Master Budget
(B,P,E. Estimate not available in Basic)

Many firms create budgets at the sub-project or phase level. This new feature automatically calculates the budgets for all of sub-projects or phases and instantly presents you with the overall project budget. No longer do you need to rekey this critical information.

Detailed Contract Amounts at phase Level
(B,P,E)

Finally you have the ability to specify the contract amounts for Services and Expenses separately at the phase or sub-project level. This is a handy new feature if expenses are part of the overall contract and you plan to track services and expense profitability separately.

Simplified Invoicing

Smart Attachment Rules (P,E)

A new project level rule has been added that will allow you to automatically assign time and/or expense attachments to the invoices as they are processed. If your clients require backup data with their receipts this will save you a lot of time and effort. This powerful new feature will function when using Billing Review, Invoice Wizard or the Manual Invoice screen.
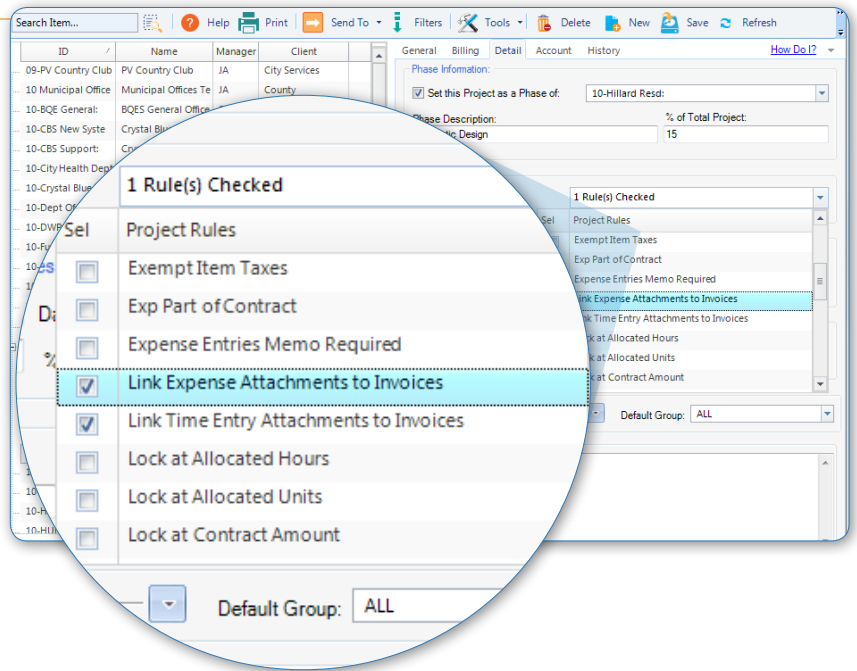

Custom Invoice PDF Names (P,E)

We know many firms like BillQuick to generate PDF's of their invoices and email them to their clients. This year we have given you the ability to specify how you want the invoice PDF named by using variables such as Client Name, Project ID, etc. This makes it easy for you and your client to identify each PDF. This great new feature is available when creating standard or joint invoices.

Send Multiple Invoices in a Single Email (P,E)

With a single click you can now send multiple invoices to your client in a single email.
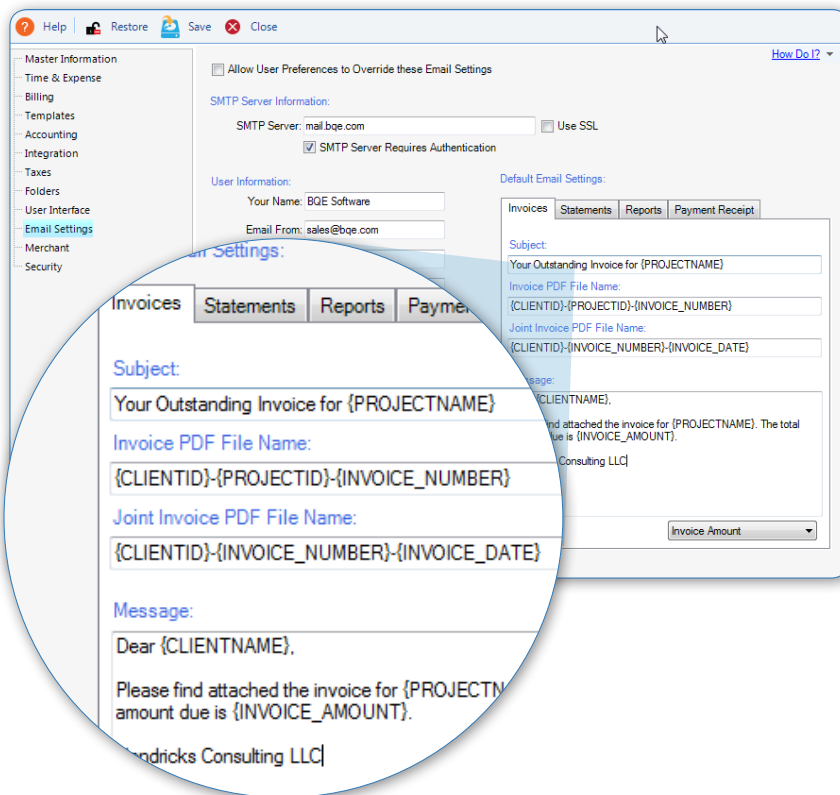
Robust Financial Management

Memorized Bills (P,E)

Easily add new vendor bills to the system automatically on a desired frequency. As an example if you are entering your internet bill every month, you can enter it once and then memorize it for the monthly frequency. A huge time saver for those responsible for entering bills.

Memorize Checks

Another brand new feature that makes paying recurring bills a simple process. Simply write the check the first time and then have the system memorize it.

Accounts Payable Drill-Down Report (B,P,E)

Everyone loves the ability to drill-down into reports by double-clicking on a number to view the source data. We've now added this feature to checks, credit memos and many other areas related to the accounts payable functionality.
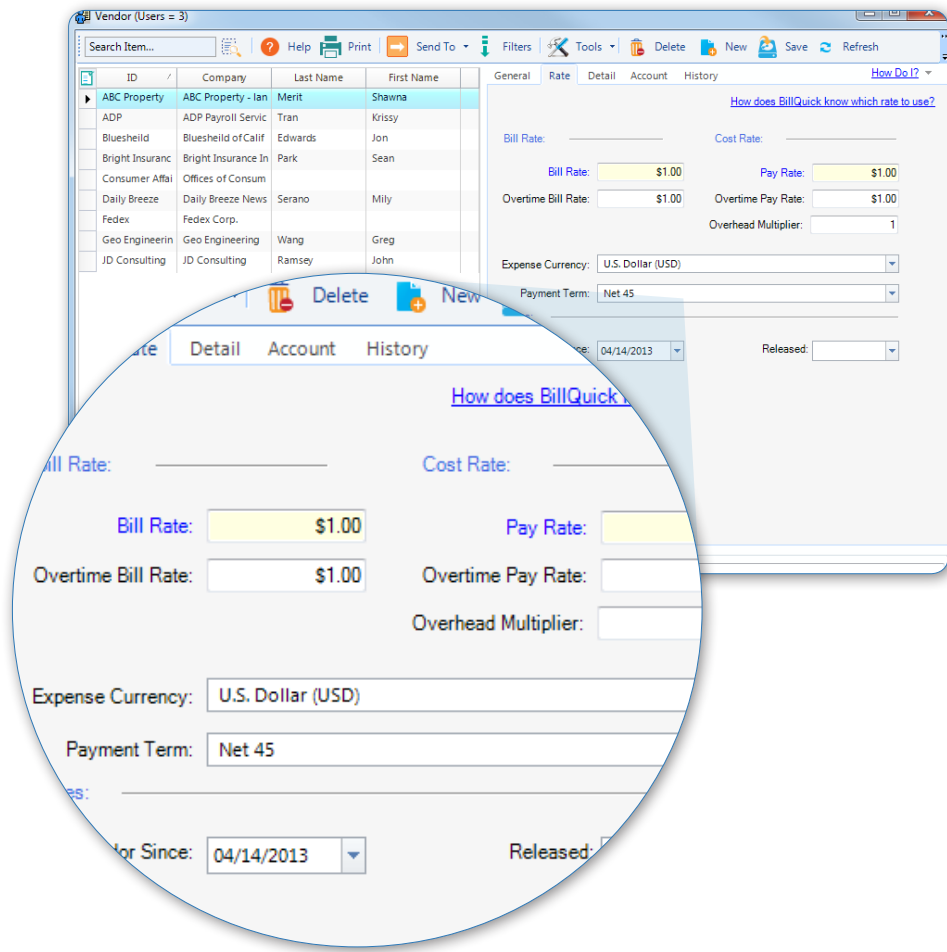
Vendor Level Payment Terms (P,E)

You can now specify the agreed payment terms at the vendor level. Each time you create a new vendor bill manually or automatically the due date on the vendor bill will be based on the specified payment terms.

Purchase Order Management

We've enhanced purchase order management by allowing you to specify a due date and a reference number (such as a package receipt number), when receiving items. You can also view the Purchase Order number at the vendor bill level.

Void and Delete (E)

You now have the ability to decide wether you want to void or delete any check or invoice. No longer do you have to make this choice at the global level and have it enforced throughout.

Purchase Tax as Value (P,E)

You can specify the amount of the purchase tax paid and BillQuick will automatically calculate the related percentage. This makes entering purchase tax easy when your receipt has a mix of taxable and non-taxable items.

# Increased Flexibility and Security

## Attach Web References (P,E)

Our attachments feature has gotten more robust. When you attach files to records you now have the option to paste in a web reference/url. This can include anything from a document in Dropbox, Google Drive, OneDrive, or even a YouTube video or blog article. The possibilities are endless.
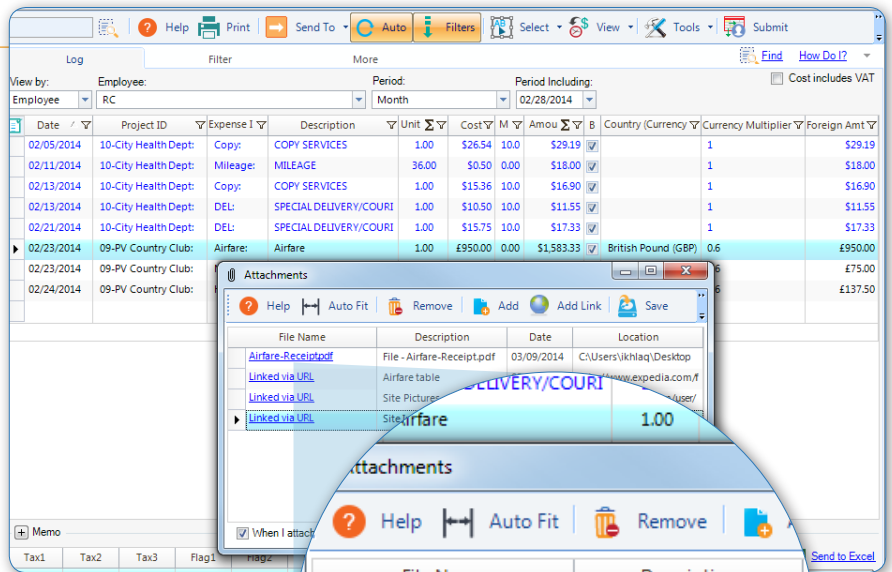
Automatic Project Journals (P,E)

Whenever certain key changes are made to a record, BillQuick will automatically create Project Journal entries. For example, if you change the project due-date or increase the contract amount, the automatic journal entry ensures a perfect history of the project is maintained without the user needing to create any manual documentation.
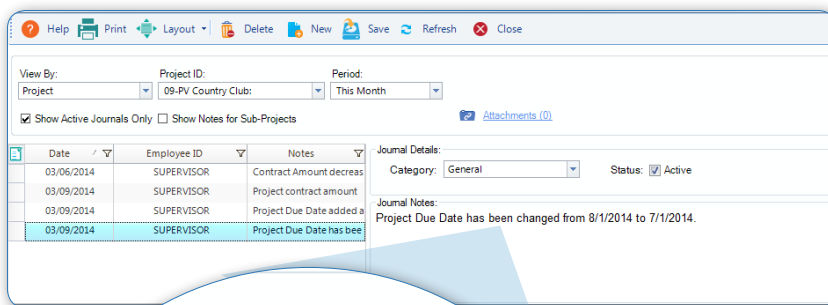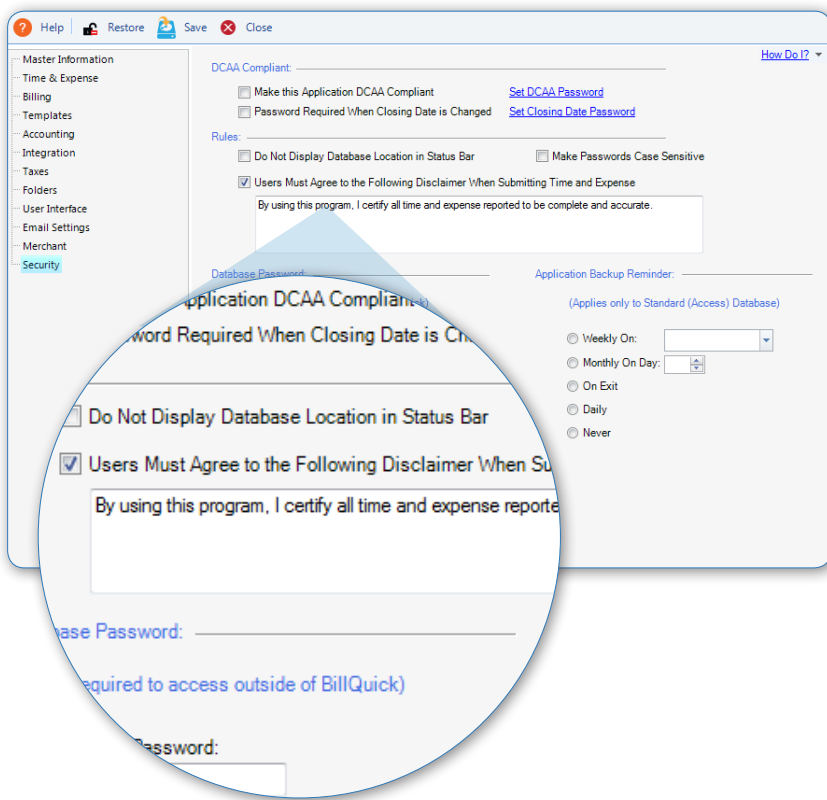
Submission Disclaimer (P,E)

This new feature is especially critical for firms that require DCAA compliance and need to ensure that employees are submitting time and expenses that are accurate and complete. Simply turn on the disclaimer settings in the Global Settings screen and BillQuick will require your employee to click on the "I Agree" checkbox prior to submitting their time and expenses.

Additional Custom Fields (P,E)

We do our best to anticipate everything your firm might want in BillQuick but we understand that some firms want more flexibility. This year we've doubled the number of custom fields form 3 to 6 in Activity, Expense, Time Entry and Expense Log screens giving you the power and flexibility to capture exactly the information you need. All related reports have been updated in Report center so you can filter by any of the custom fields.

Enhanced Security (E)

We added several new security controls in BillQuick 2014 including the ability to hide the cost specific bar charts in the Project Center. This is particularly helpful if you don't want your project managers to see the costs associated with their projects but still want them to have access to this valuable module.

Account Names instead of Numbers (P,E)

If you use the Accounting functionality, we added a switch in User Preferences where you can change the mode of entry to account name instead of account number.

New and Enhanced Reporting

We've added several powerful, smart and intuitive reports as well as enhancing many of our existing reports so you can get actionable information quickly and easily. (B,P,E. Only in applicable modules)

- To-Do list with Percent Complete Report
- Aging Report with Vendor Balances per Invoice
- 1099 Forms for Vendors

- Balance Sheet now includes Retained Earnings
- Void/Delete Invoices History Report
- Top (N) Reports

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