BillQuick Tips and Tricks 2017

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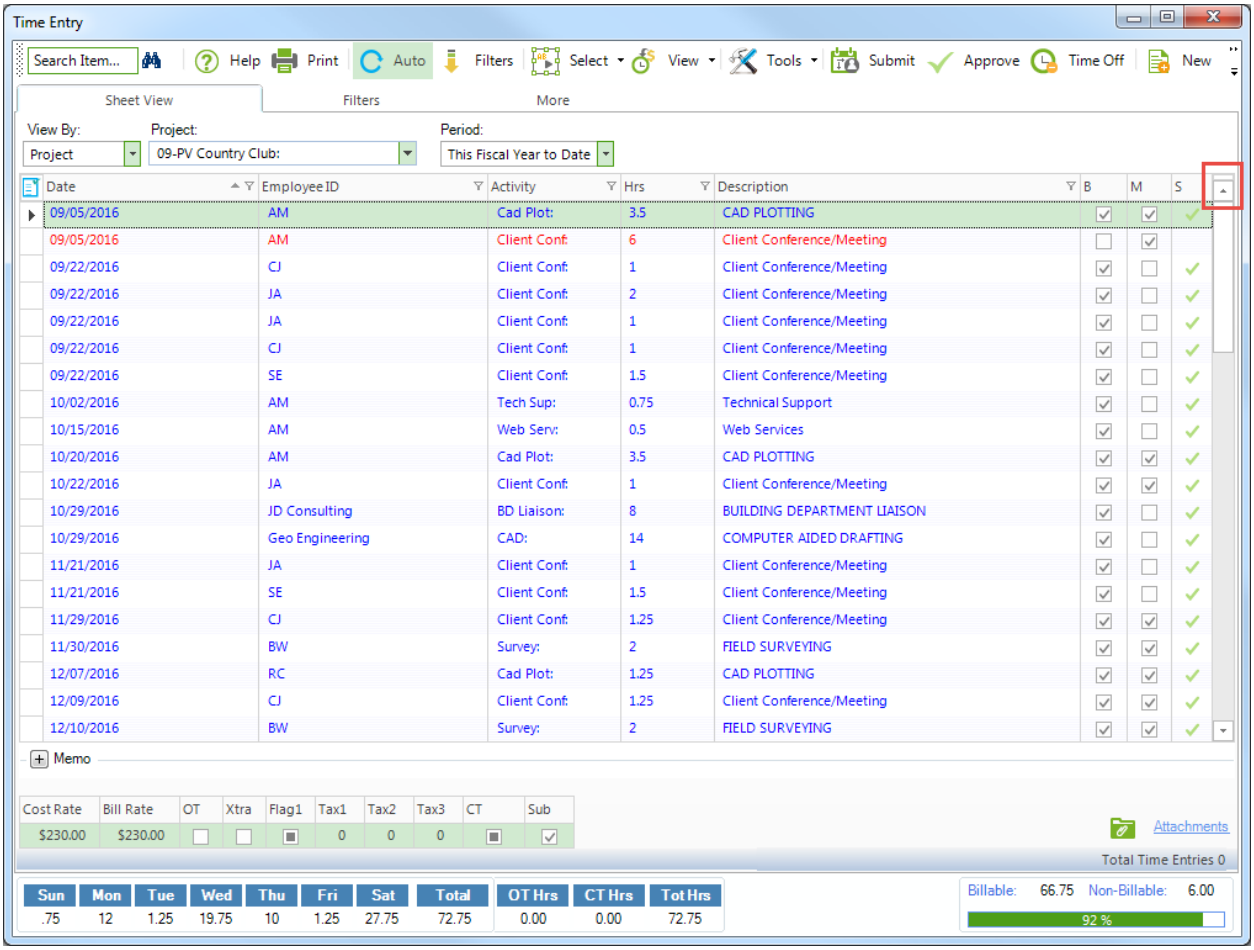
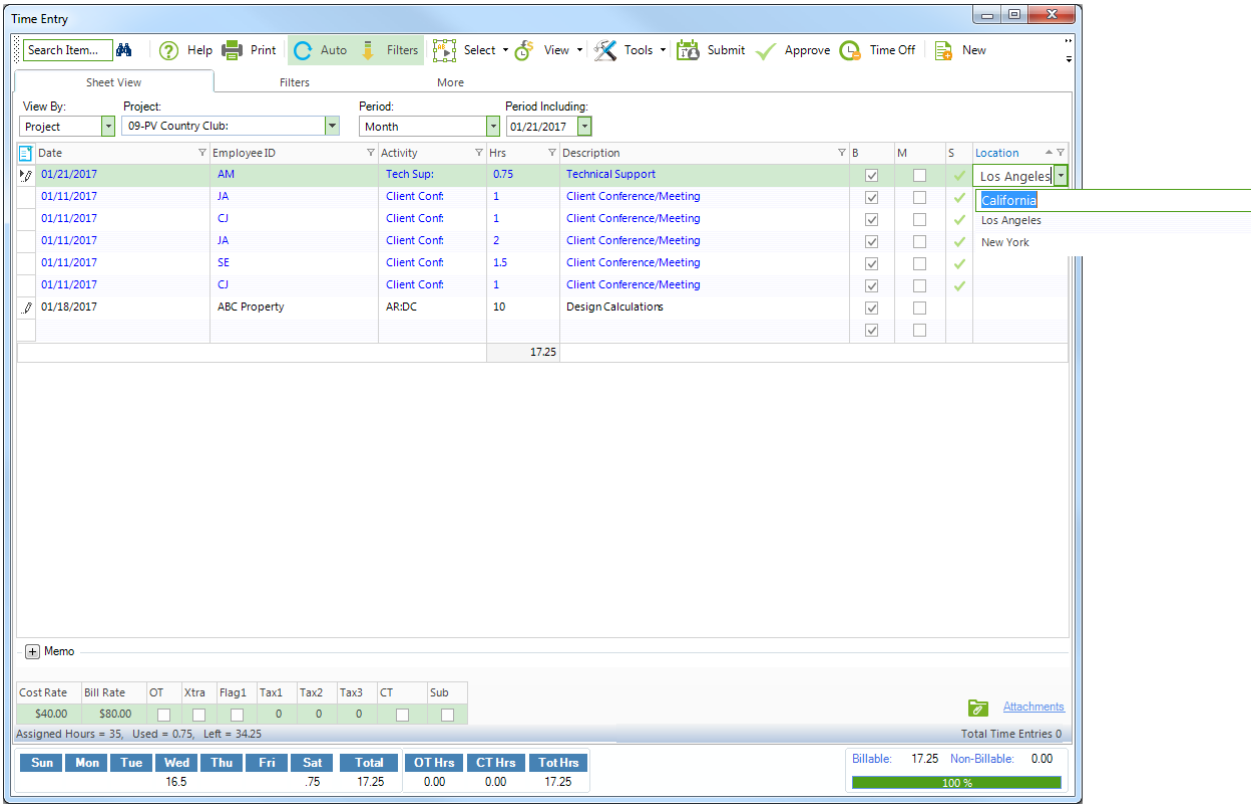
USER INTERFACE TIPS

Grid Split



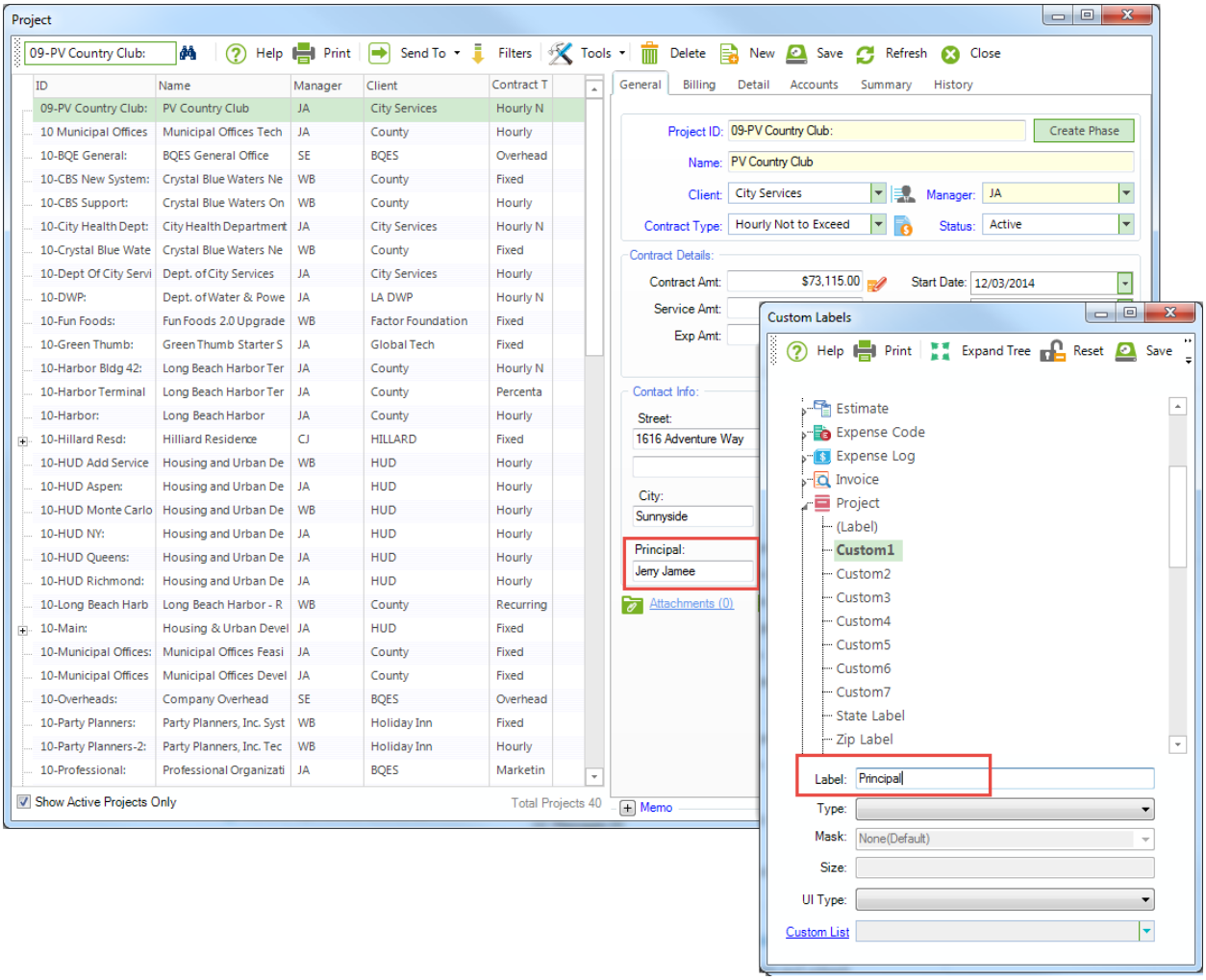
Here is a productivity efficiency tip wherein you can avoid scrolling up-and-down and left-and-right all the time. You can organize the data on your grid by using grid splitters. Click and drag the vertical or horizontal splitter on your screen to split data on the grid into two parts. To get rid of it, just drag the splitter back to the top or left of the grid. For example, you can use splitters while reviewing time entries and comparing data in Sheet View by freezing your Date and Project columns on the left or viewing the time entries of an employee for different periods.

Custom UI on Time Entry



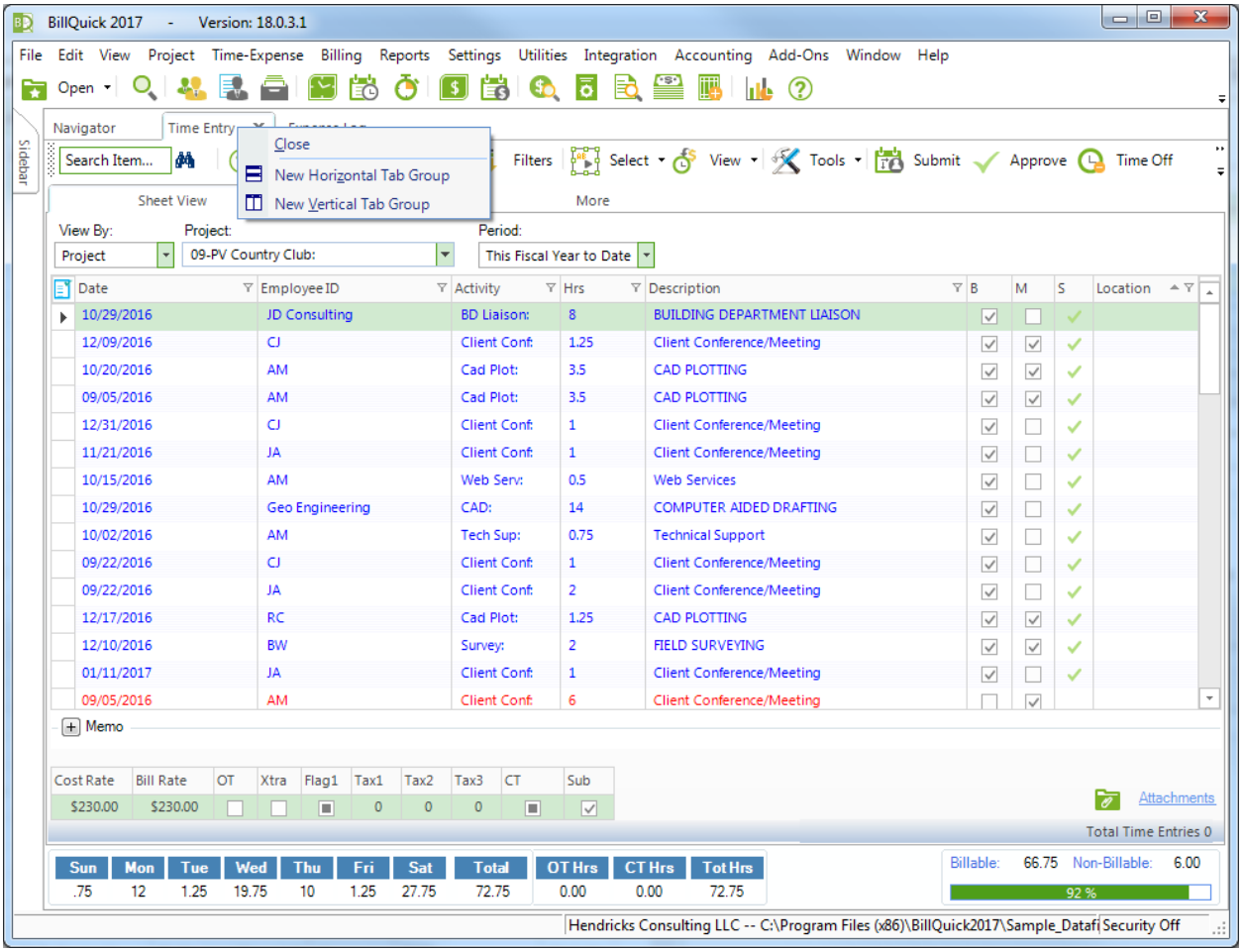
BillQuick already provided you with custom fields in many screens but you can take it a step further by customizing their labels and user interface. For example, if you want your employees to record the location of the time entry where the service was provided, show the Custom 1 field in Sheet View using the field chooser. You can change its label to Location in the Custom Labels screen and have them type a location in it. Better still, eliminate the possibility of them making a typing mistake while entering time. Just go to the Custom Labels screen; change the caption of the field, select the data type (say text) and specify the UI type as a Custom List. Create a custom list of your office or project locations. When you revisit the time entry screen, you will see the Location column heading and a new drop-down list of various locations. Your employees can now select items from this drop-down. The same can be done in other screens like Expense Log and Project. Here is the best part–you can also filter your reports by these custom fields. Couldn't get any better!

Custom UI on Project



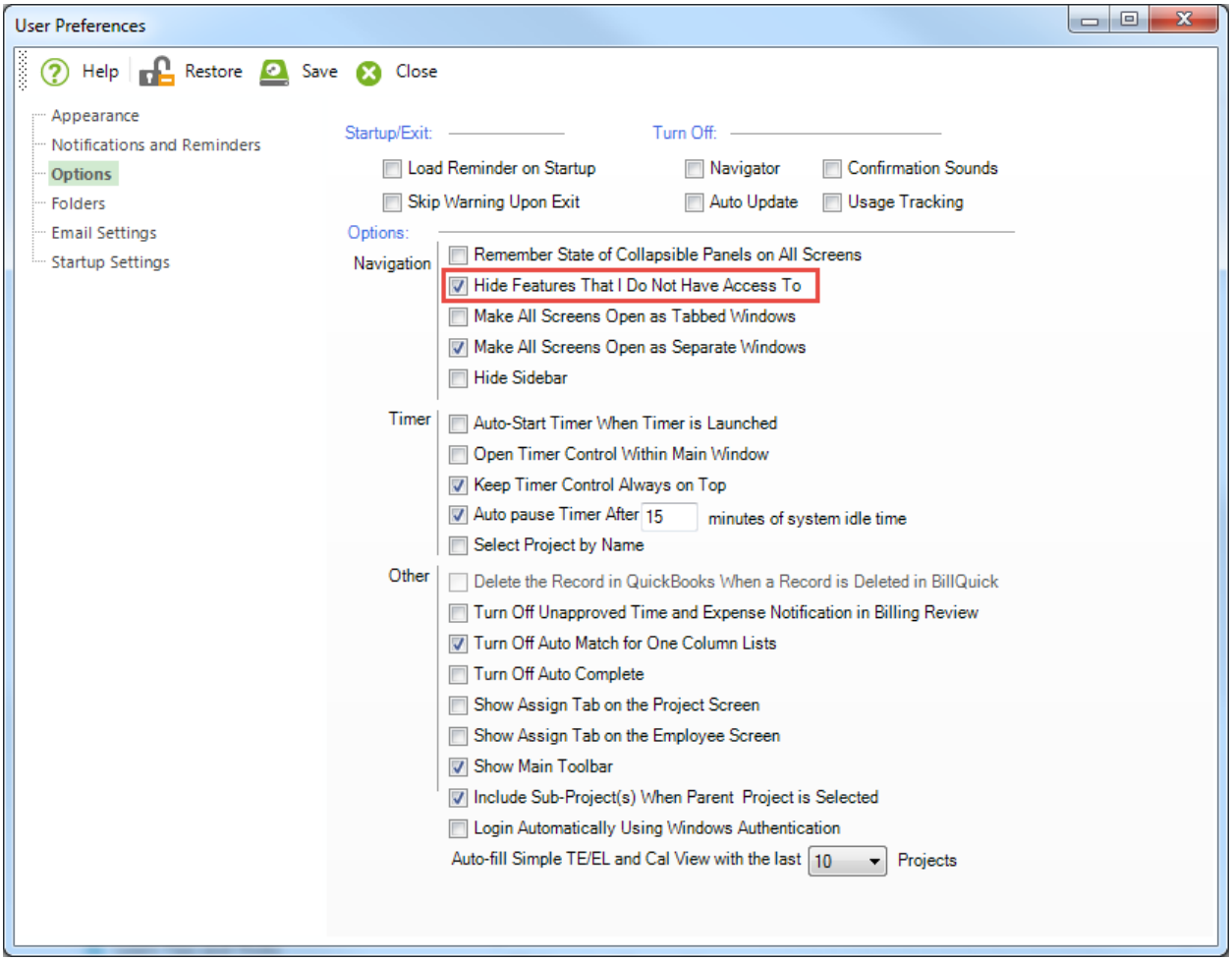
BillQuick allows you to customize the labels and user interface of all your custom fields. For example, if you want to add the name of your company's principal or in-charge in the Project screen, you can easily do that using this feature. Go to the Custom Labels screen; change the caption of Custom 1 field to 'Principal'. When you revisit the Project screen, you will see the new label instead. The same can be done in other screens like Client and Employee. Here is the best part–you can also filter your reports by these custom fields.

Tab Split



BillQuick is so flexible that it allows you to view multiple screens on its desktop. You can re-arrange your tabbed screens to see more than one screen at a time. How? Open multiple screens in tabbed view; right-click on a tab, say Expense Log; choose the horizontal or vertical tab group option. You can now see two screens at the same time. This is especially useful if you want to review time and expense entries of an employee at the same time.

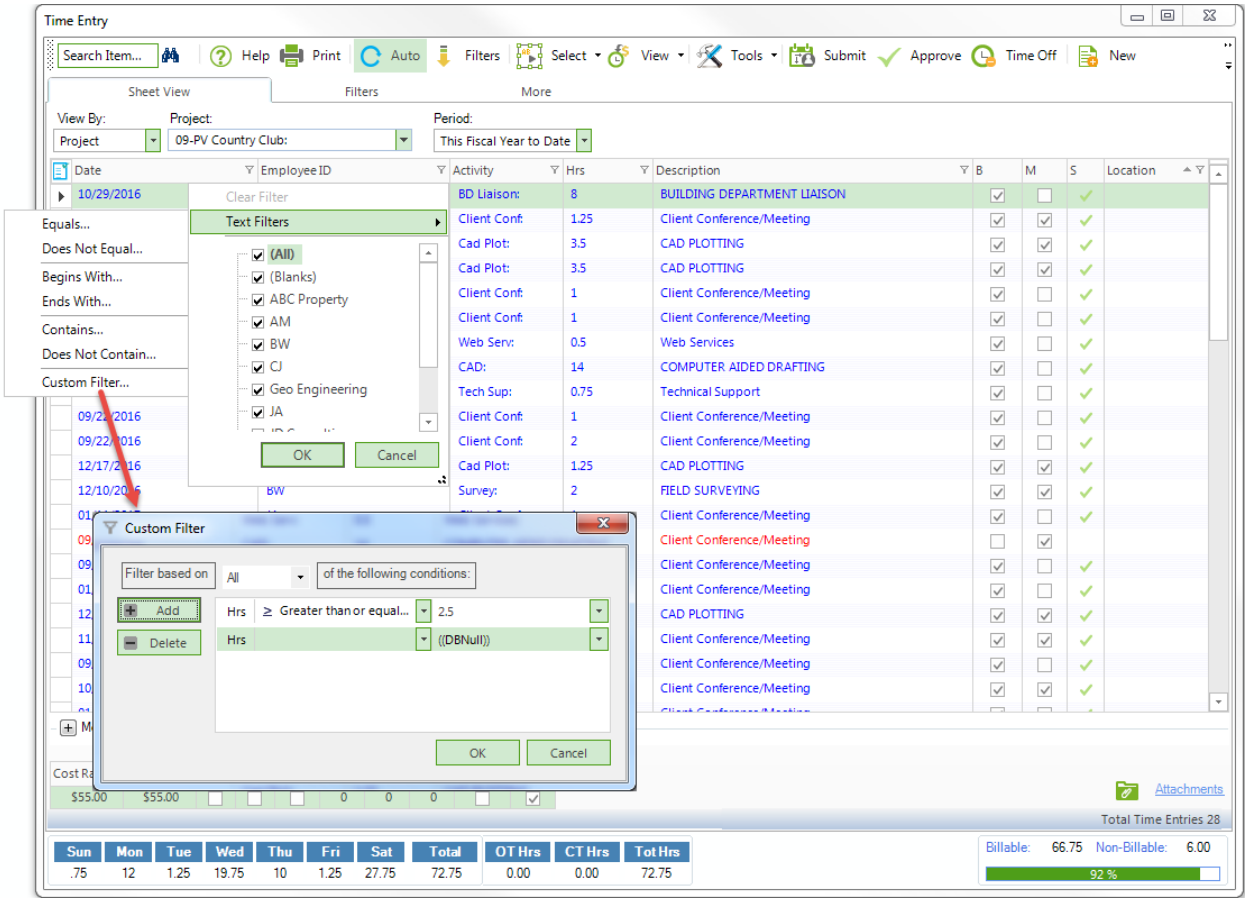
Accessible Features



There are many features in BillQuick, which can be overwhelming for some people. For timekeepers in your company, it makes sense to assign the Time & Expense Only security to them. As these employees have limited access in BillQuick, they get to see a customized toolbar and menu bar on login. All the inaccessible features are grayed out (disabled) for them. However, let's take it a step further. From User Preferences, you can choose to hide the features that you do not have access to. Result? It simplifies the user interface and trims down your toolbar to suit your role and requirements.

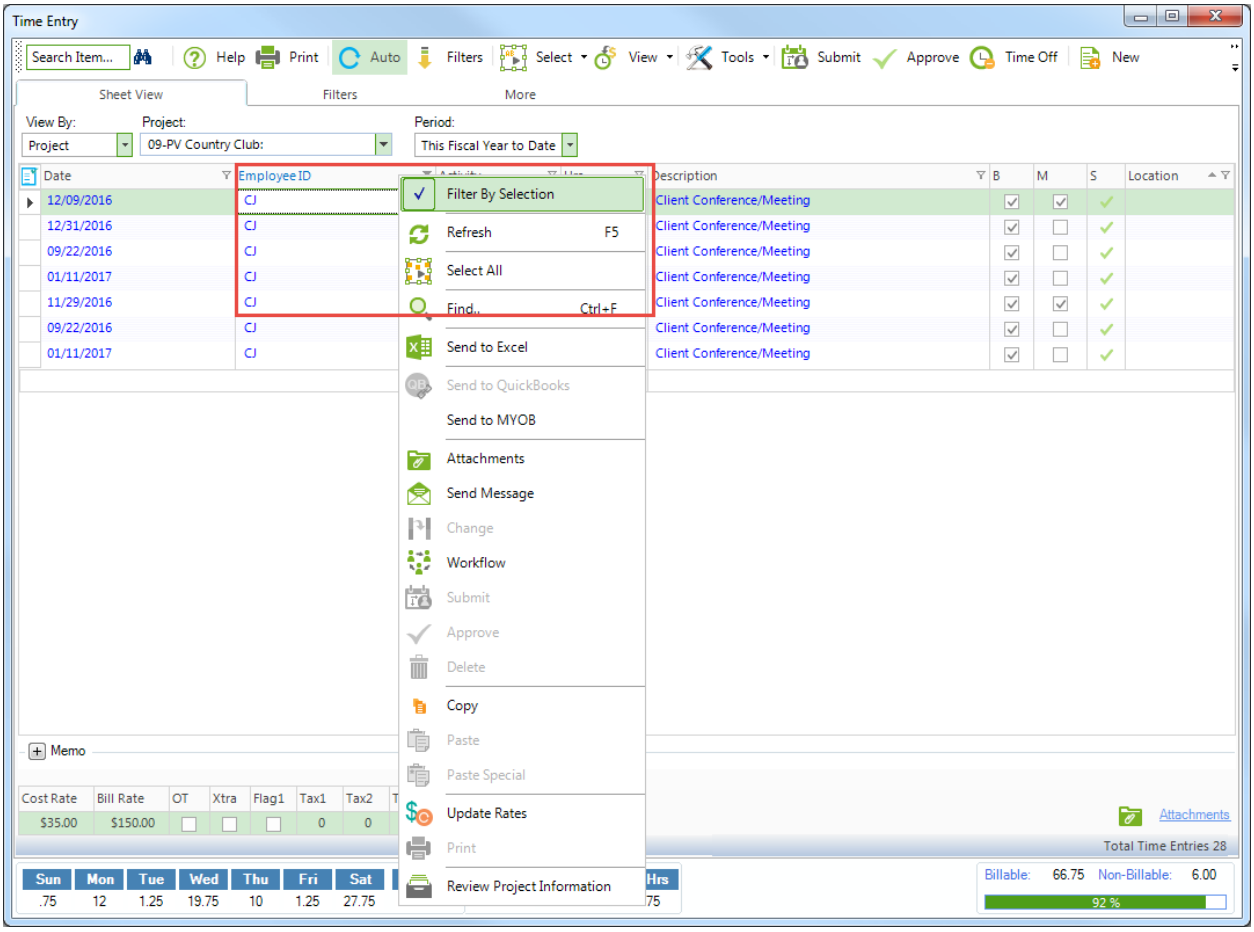
EASE OF USE TIPS

Funnel Filters



If you are frustrated with having too much data on your BillQuick screens, use funnel filters to view selective data quickly and efficiently. For instance, in Sheet View, you can view entries for one employee only by right clicking on its funnel icon and choosing that Employee ID from the list. To narrow it further, you can choose to apply another filter, say Hours. The funnel icons turn dark to show which filters are on. You can even apply conditional formulae to be more specific. For example, to see only those time entries whose hours are more than 0.5, use Custom Filter option. As you define the filters, your grid gets filtered down to specific entries instantly.

Filter by Selection



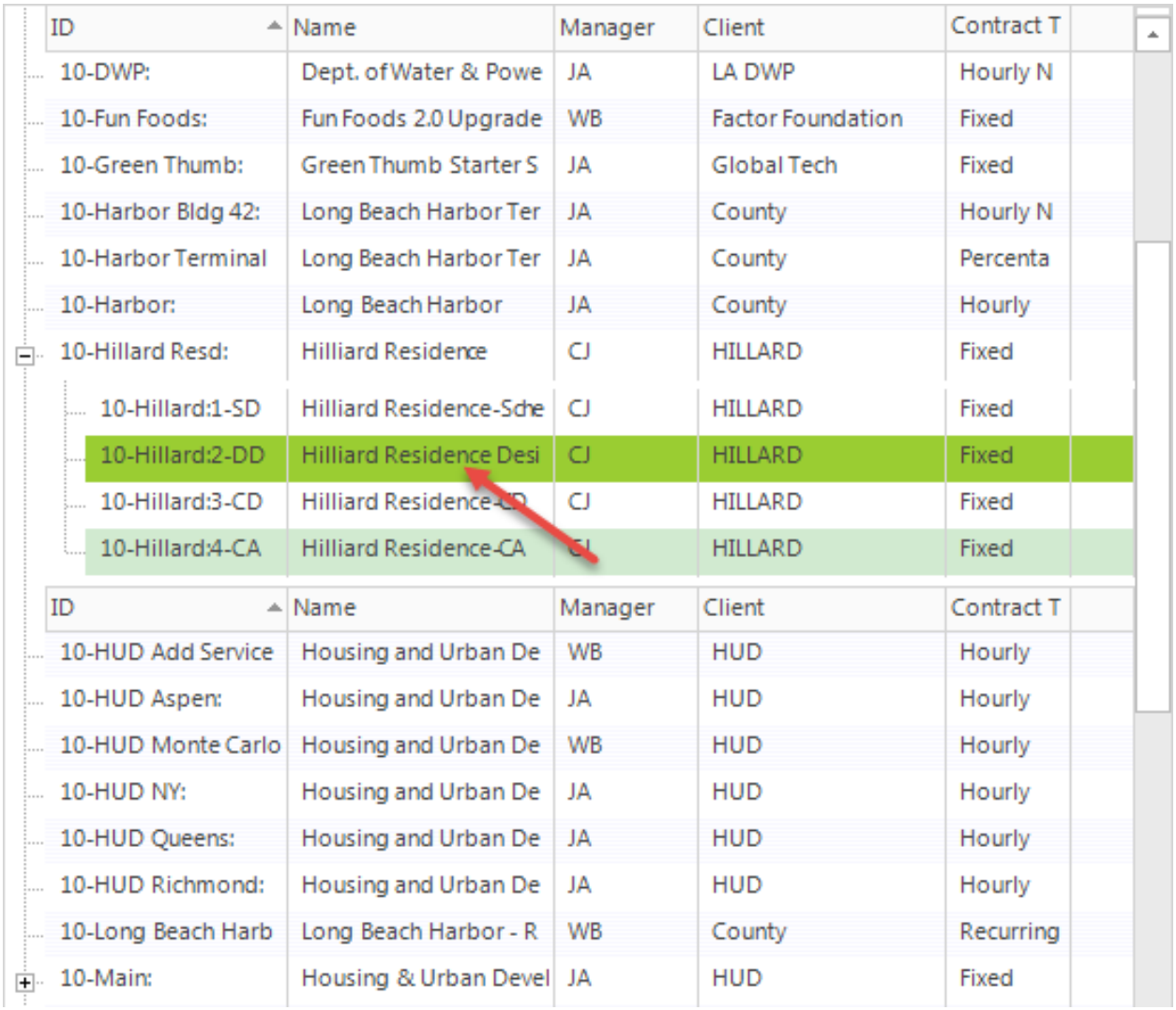
When you have huge data for analysis and want to get to it faster, use the *Filter by Selection* feature in BillQuick. This toggle option saves you time in reviewing data. For example, the Sheet View screen has thousands of time and expense records. To view selective time entries, right click on the desired one and choose to filter by it. BillQuick instantly filters the data and all you see are records with that specific expense item. Just remove the checkmark to remove the filter. This feature is especially useful in Billing Review where you can filter records by Hourly projects and get those invoices out quickly.

Default Navigator

The navigators let you easily understand the workflow in BillQuick and quickly access important features and screens in the program. They have active action buttons, data flows, charts, and links –making it easier for first time as well as experienced users to work with BillQuick. Depending upon your preference or requirement, you can make any one of these as your default navigator—Company, Management, Time & Expense, Billing and Accounting. All you do is check the Default option at the bottom of it and from then onwards whenever you start BillQuick, that very navigator opens for you. You can even set the default on your Dashboard.

Bonus Tip: You can also use a role-based navigator that provides easy access to the often-performed actions by you. The role specified for you on the Employee screen determines which navigator displays at your startup—Default, Time & Expense, Billing or Principal/Management.

Drag and Drop Project Phases



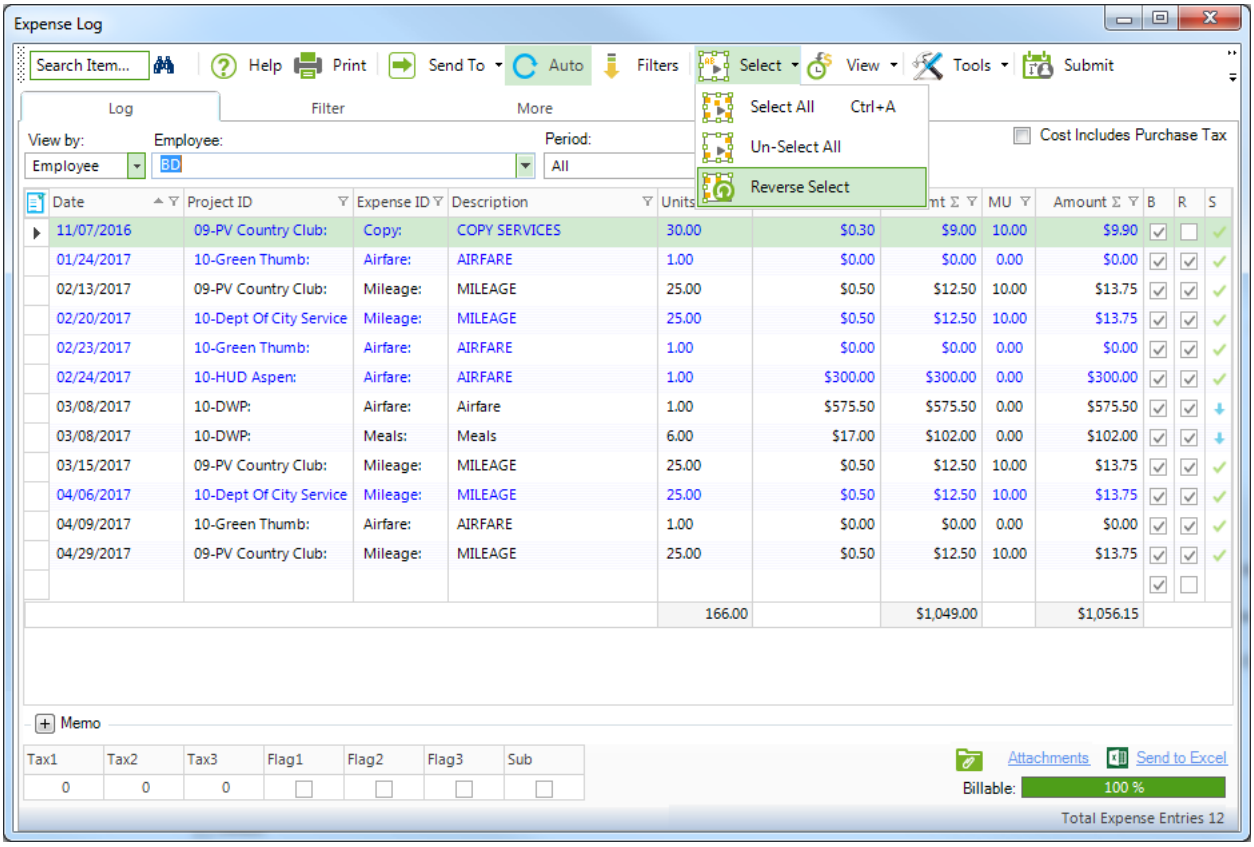
ID	Name	Manager	Client	Contract T
10-DWP:	Dept. of Water & Powe	JA	LA DWP	Hourly N
10-Fun Foods:	Fun Foods 2.0 Upgrade	WB	Factor Foundation	Fixed
10-Green Thumb:	Green Thumb Starter S	JA	Global Tech	Fixed
10-Harbor Bldg 42:	Long Beach Harbor Ter	JA	County	Hourly N
10-Harbor Terminal	Long Beach Harbor Ter	JA	County	Percenta
10-Harbor:	Long Beach Harbor	JA	County	Hourly
10-Hillard Resd:	Hilliard Residence	CJ	HILLARD	Fixed
10-Hillard:1-SD	Hilliard Residence-Sche	CJ	HILLARD	Fixed
10-Hillard:2-DD	Hilliard Residence Desi	CJ	HILLARD	Fixed
10-Hillard:3-CD	Hilliard Residence-CD	CJ	HILLARD	Fixed
10-Hillard:4-CA	Hilliard Residence-CA	CJ	HILLARD	Fixed
ID	Name	Manager	Client	Contract T
10-HUD Add Service	Housing and Urban De	WB	HUD	Hourly
10-HUD Aspen:	Housing and Urban De	JA	HUD	Hourly
10-HUD Monte Carlo	Housing and Urban De	WB	HUD	Hourly
10-HUD NY:	Housing and Urban De	JA	HUD	Hourly
10-HUD Queens:	Housing and Urban De	JA	HUD	Hourly
10-HUD Richmond:	Housing and Urban De	JA	HUD	Hourly
10-Long Beach Harb	Long Beach Harbor - R	WB	County	Recurring
10-Main:	Housing & Urban Devel	JA	HUD	Fixed

You may record time to different projects and then feel the need to associate one project to another. Or you may be working on similar projects for a client but at different locations and want to create a relationship between them. BillQuick allows you to create phases for a parent project upfront or later associate a project as a phase of another, provided the client is common. The quickest and easiest way to do it is to just drag and drop one project on top of another on the grid. If the row turns green, it means you can create a phase but if it turns red, you can't do it because the client isn't common for both.

BillQuick Mobile App

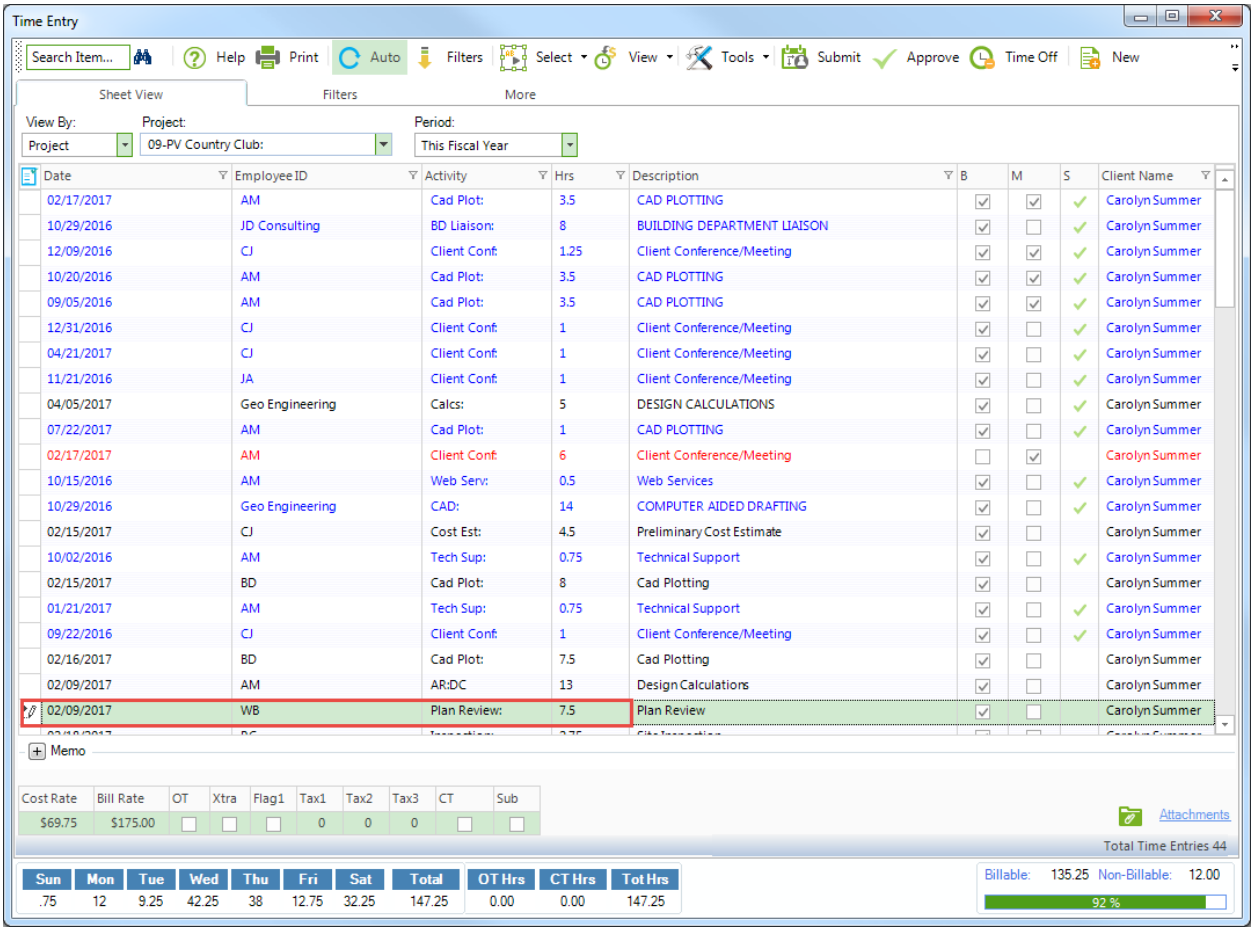
If you are a Web Suite User or have subscribed to BillQuick Online, you can download the BillQuick Mobile app for your iPhone, Windows 8 phone or Android phone. And it's absolutely free! Timekeepers can enter time and expenses on their mobile devices. Being a native app, there is no need to have constant cellular data server to record time. You can enter data even without a cellphone signal and later sync it with your data on the cloud or web server.

Reverse Select



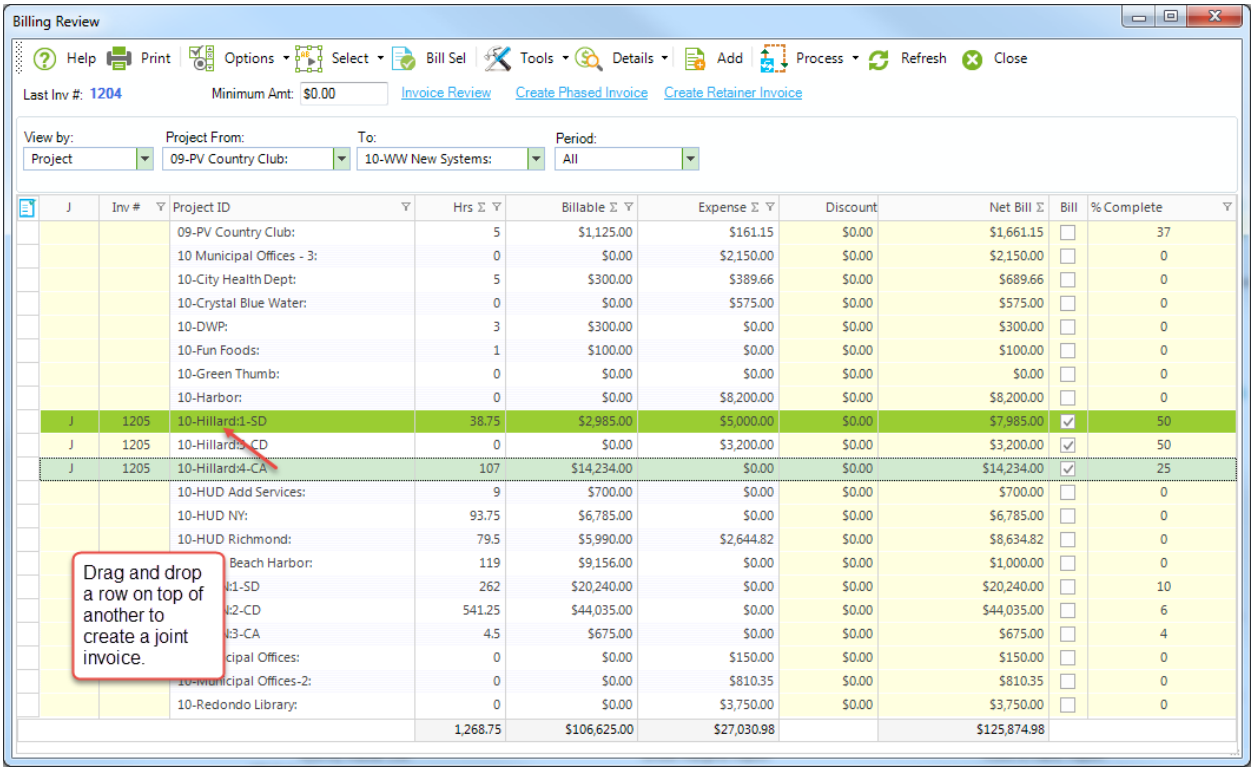
If you are in a BillQuick screen, say Expense Log, and want to select all records in the grid except a few, what will you do? Typically, you will select rows individually using the Ctrl key or select a batch of rows using the Shift key. But that will be time consuming. Now here's a big time saver! Select only the rows you don't want and then use the Reverse Select option to reverse that selection. It un-selects what you selected and selects what you didn't select. This is useful in Billing Review, where you may want to bill all projects except a few.

Plus and Asterisk Keys



You can enter time twice as fast by reducing your key strokes to half. Record a time entry by picking a Date, Project ID, and Activity ID, and then enter your hours. In the second row, skip picking the date and project. BillQuick is smart enough to know that you want to keep it same for the next entry as well. Just enter an activity and while entering hours, press the + key to increase you date by one day. Else, press * key to decrease the date by one day. You don't have to go into the Date field any more. Result…faster entry and less key strokes!

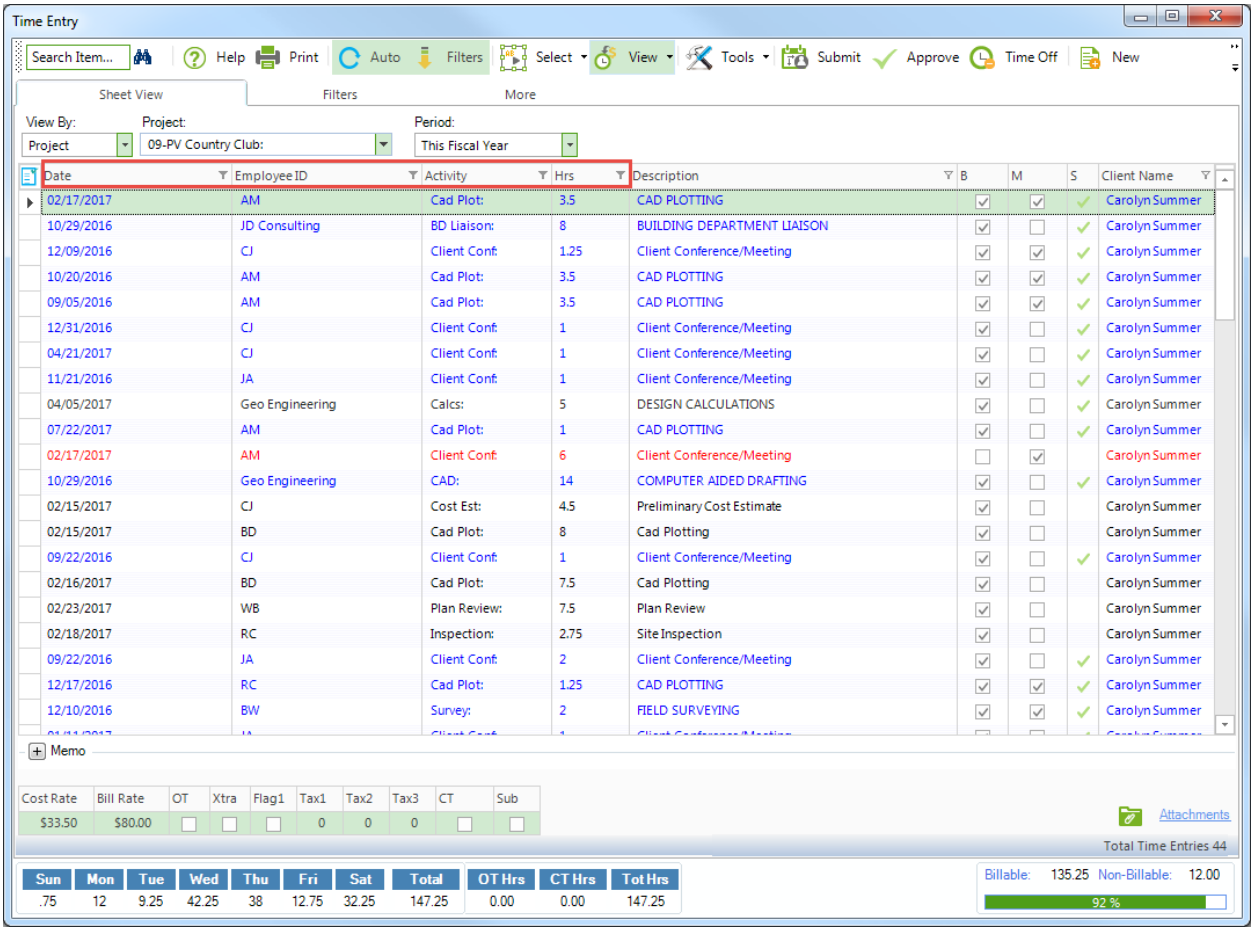
Drag and Drop in Billing Review



J	Inv #	Project ID	Hrs Σ	Billable Σ	Expense Σ	Discount	Net Bill Σ	Bill	% Complete
		09-PV Country Club:	5	$1,125.00	$161.15	$0.00	$1,661.15	☐	37
		10 Municipal Offices - 3:	0	$0.00	$2,150.00	$0.00	$2,150.00	☐	0
		10-City Health Dept:	5	$300.00	$389.66	$0.00	$689.66	☐	0
		10-Crystal Blue Water:	0	$0.00	$575.00	$0.00	$575.00	☐	0
		10-DWP:	3	$300.00	$0.00	$0.00	$300.00	☐	0
		10-Fun Foods:	1	$100.00	$0.00	$0.00	$100.00	☐	0
		10-Green Thumb:	0	$0.00	$0.00	$0.00	$0.00	☐	0
		10-Harbor:	0	$0.00	$8,200.00	$0.00	$8,200.00	☐	0
J	1205	10-Hillard:1-SD	38.75	$2,985.00	$5,000.00	$0.00	$7,985.00	☑	50
J	1205	10-Hillard:2-CD	0	$0.00	$3,200.00	$0.00	$3,200.00	☑	50
J	1205	10-Hillard:4-CA	107	$14,234.00	$0.00	$0.00	$14,234.00	☑	25
		10-HUD Add Services:	9	$700.00	$0.00	$0.00	$700.00	☐	0
		10-HUD NY:	93.75	$6,785.00	$0.00	$0.00	$6,785.00	☐	0
		10-HUD Richmond:	79.5	$5,990.00	$2,644.82	$0.00	$8,634.82	☐	0
		Beach Harbor:	119	$9,156.00	$0.00	$0.00	$1,000.00	☐	0
		:1-SD	262	$20,240.00	$0.00	$0.00	$20,240.00	☐	10
		:2-CD	541.25	$44,035.00	$0.00	$0.00	$44,035.00	☐	6
		:3-CA	4.5	$675.00	$0.00	$0.00	$675.00	☐	4
		cipal Offices:	0	$0.00	$150.00	$0.00	$150.00	☐	0
		10-Municipal Offices-2:	0	$0.00	$810.35	$0.00	$810.35	☐	0
		10-Redondo Library:	0	$0.00	$3,750.00	$0.00	$3,750.00	☐	0
			1,268.75	$106,625.00	$27,030.98		$125,874.98		

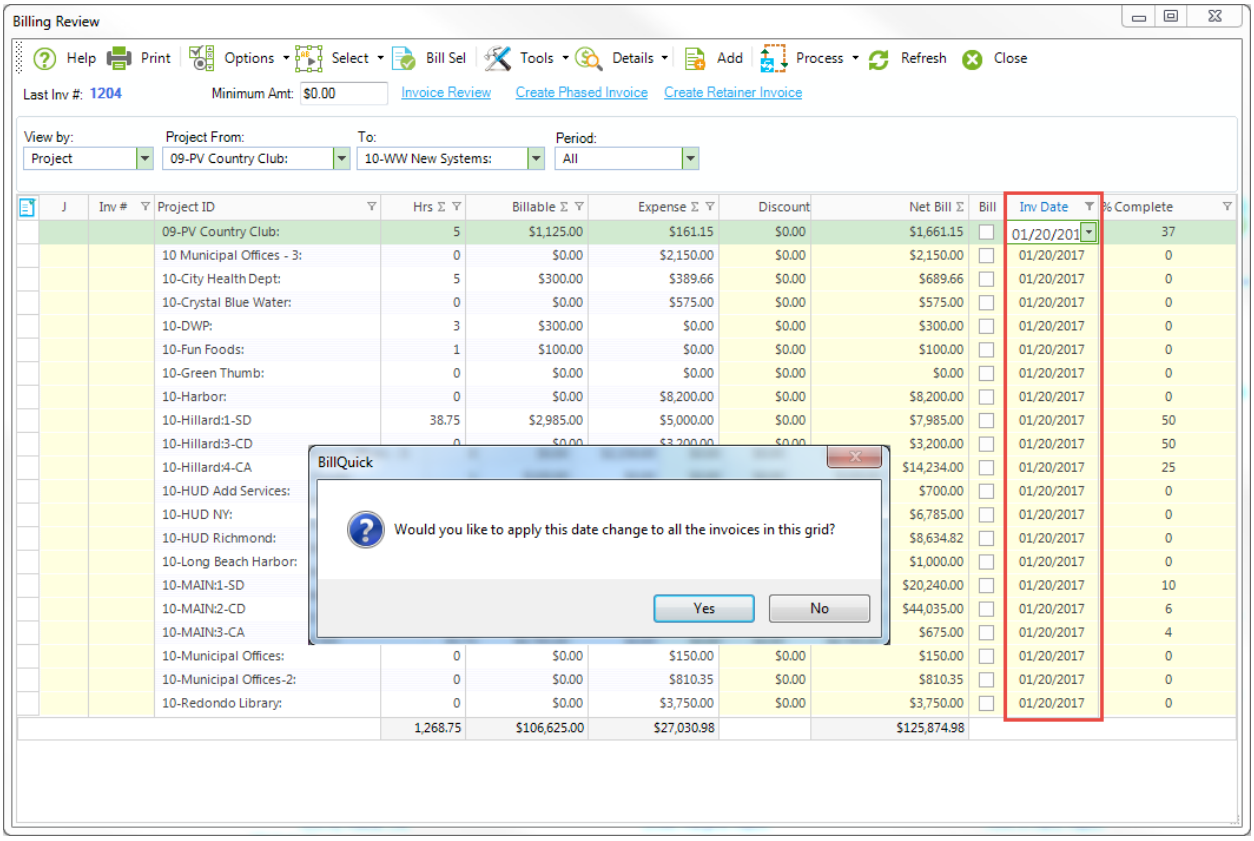
If you have a client with multiple projects or phases, you may bill him on a joint invoice in Billing Review. Instead of tagging each billing record with a unique identifier, you can just drag a row and drop it over another. The row turns green to indicate that you can join invoices; red means you cannot. As you check the B (Bill) box to generate invoices, BillQuick assigns the same invoice number to all of them. Billing just got easier and fun to do!

Double Sort



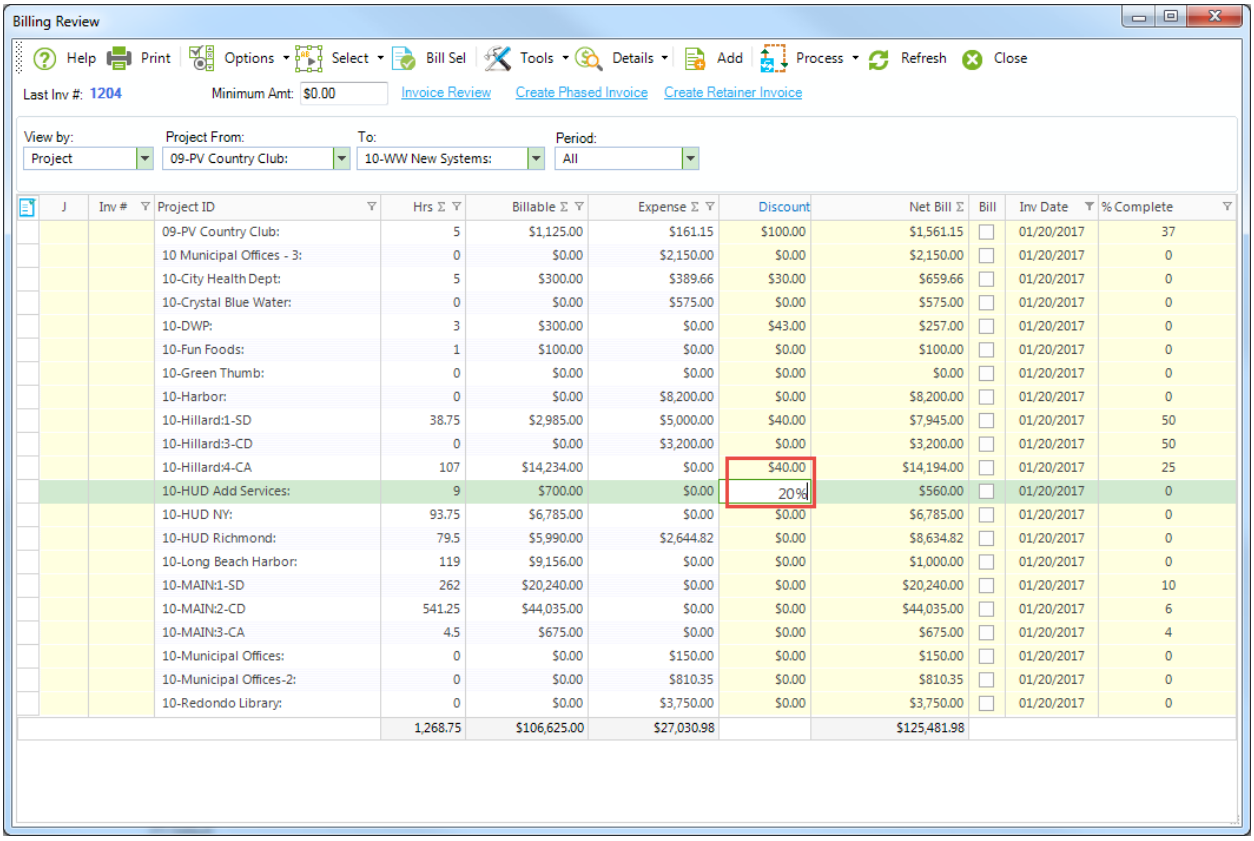
You already know about sorting your grids by any field with a click on the column header. But did you know that you can sort your grids by two or more columns? After you sort by one column in the ascending or descending order, use Shift+click on the second column. To sort by multiple columns, continue to use Shift+click on that column.

Invoice Date



Did you know that BillQuick allows you to change the date of an invoice in Billing Review? In fact, when you do that it prompts you to apply the date change to all the invoices displayed on the grid. You just need to show the Invoice Date column using the Field Chooser and change it.

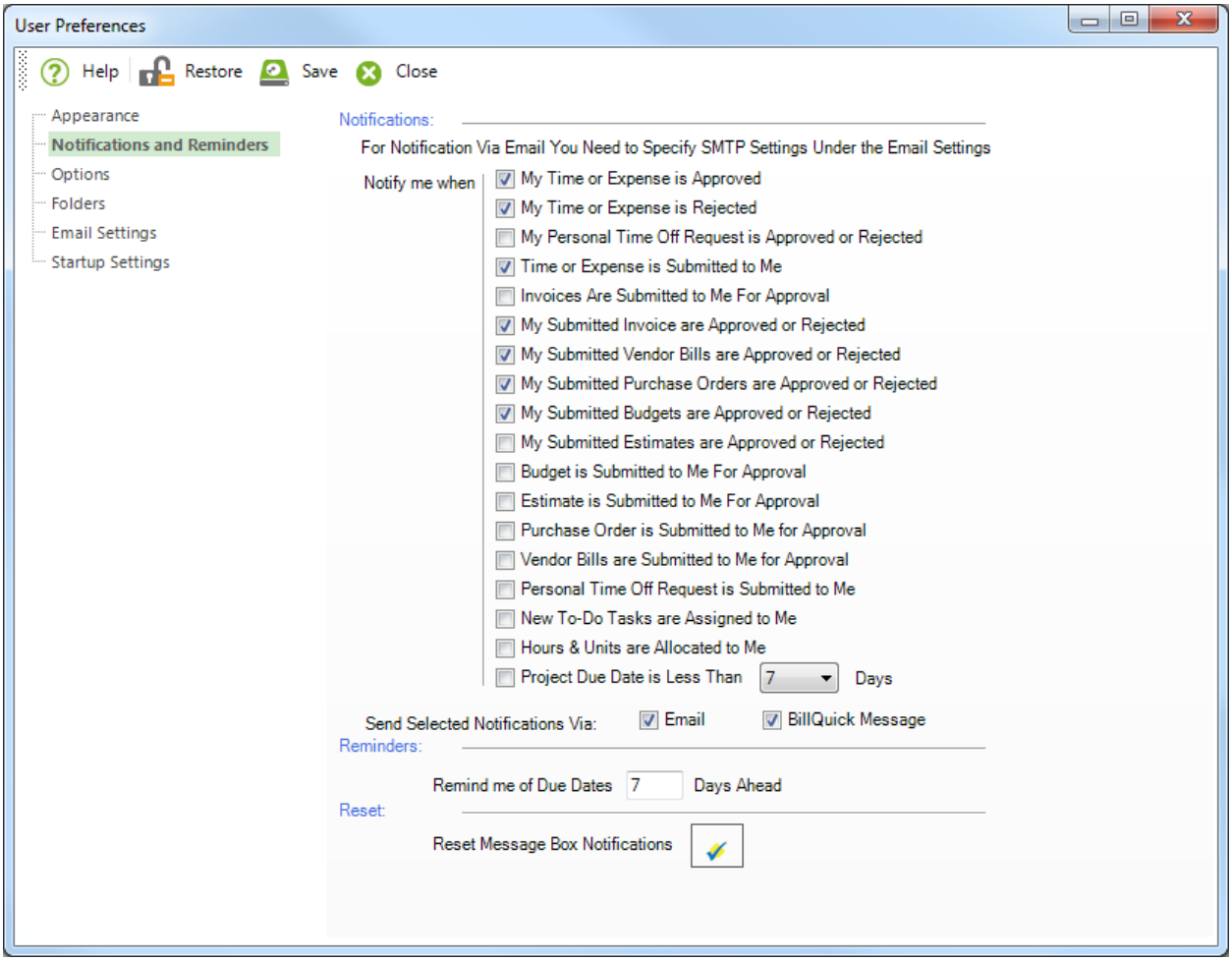
Percent and Dollar Symbols



J	Inv #	Project ID	Hrs Σ	Billable Σ	Expense Σ	Discount	Net Bill Σ	Bill	Inv Date	% Complete
		09-PV Country Club:	5	$1,125.00	$161.15	$100.00	$1,561.15		01/20/2017	37
		10 Municipal Offices - 3:	0	$0.00	$2,150.00	$0.00	$2,150.00		01/20/2017	0
		10-City Health Dept:	5	$300.00	$389.66	$30.00	$659.66		01/20/2017	0
		10-Crystal Blue Water:	0	$0.00	$575.00	$0.00	$575.00		01/20/2017	0
		10-DWP:	3	$300.00	$0.00	$43.00	$257.00		01/20/2017	0
		10-Fun Foods:	1	$100.00	$0.00	$0.00	$100.00		01/20/2017	0
		10-Green Thumb:	0	$0.00	$0.00	$0.00	$0.00		01/20/2017	0
		10-Harbor:	0	$0.00	$8,200.00	$0.00	$8,200.00		01/20/2017	0
		10-Hillard:1-SD	38.75	$2,985.00	$5,000.00	$40.00	$7,945.00		01/20/2017	50
		10-Hillard:3-CD	0	$0.00	$3,200.00	$0.00	$3,200.00		01/20/2017	50
		10-Hillard:4-CA	107	$14,234.00	$0.00	$40.00	$14,194.00		01/20/2017	25
		10-HUD Add Services:	9	$700.00	$0.00	20%	$560.00		01/20/2017	0
		10-HUD NY:	93.75	$6,785.00	$0.00	$0.00	$6,785.00		01/20/2017	0
		10-HUD Richmond:	79.5	$5,990.00	$2,644.82	$0.00	$8,634.82		01/20/2017	0
		10-Long Beach Harbor:	119	$9,156.00	$0.00	$0.00	$1,000.00		01/20/2017	0
		10-MAIN:1-SD	262	$20,240.00	$0.00	$0.00	$20,240.00		01/20/2017	10
		10-MAIN:2-CD	541.25	$44,035.00	$0.00	$0.00	$44,035.00		01/20/2017	6
		10-MAIN:3-CA	4.5	$675.00	$0.00	$0.00	$675.00		01/20/2017	4
		10-Municipal Offices:	0	$0.00	$150.00	$0.00	$150.00		01/20/2017	0
		10-Municipal Offices-2:	0	$0.00	$810.35	$0.00	$810.35		01/20/2017	0
		10-Redondo Library:	0	$0.00	$3,750.00	$0.00	$3,750.00		01/20/2017	0
			1,268.75	$106,625.00	$27,030.98		$125,481.98			

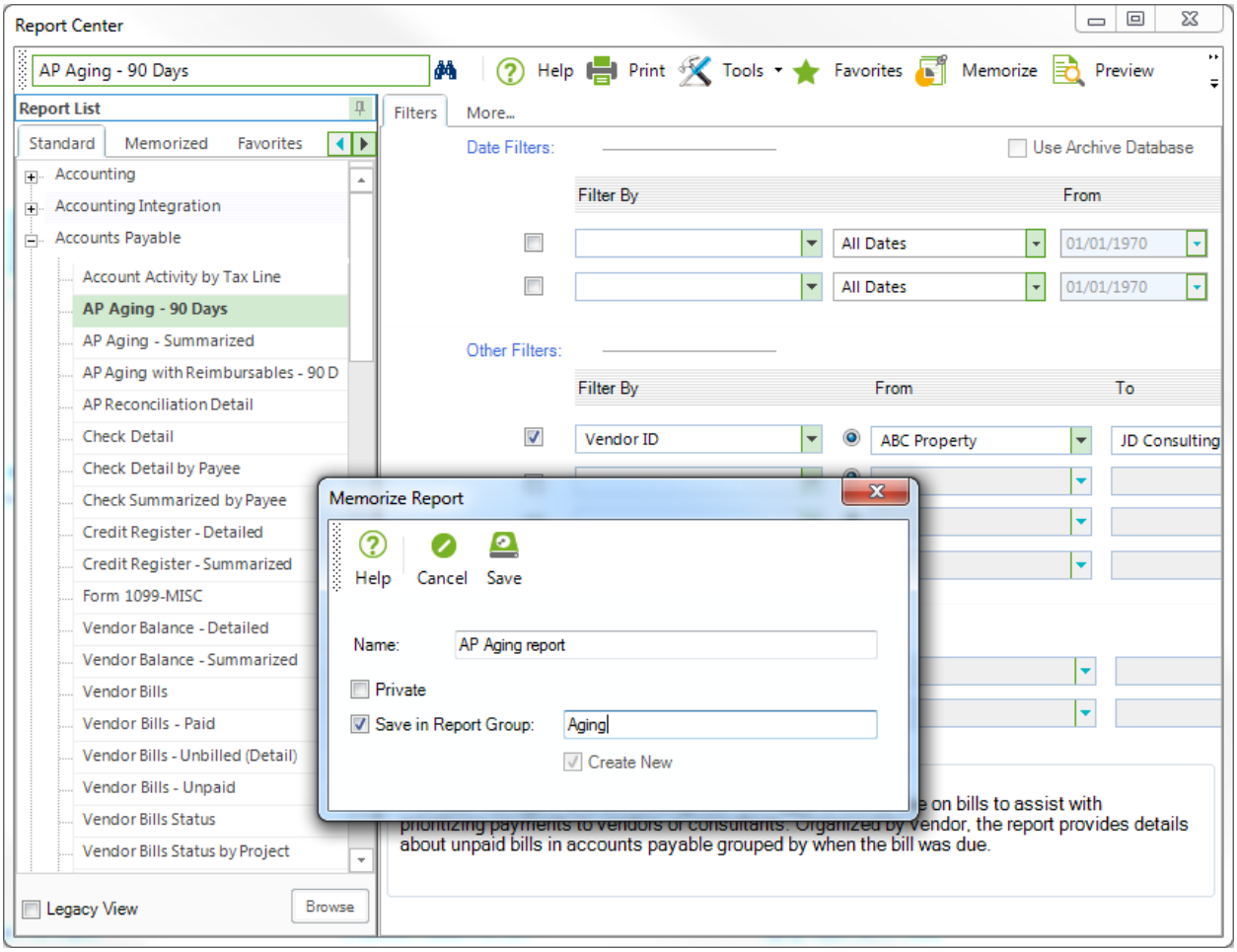
Are your billing sessions tedious? Are you frustrated with doing so many calculations? Here is some relief for you. If you are in Billing Review and want to apply a discount to the billing record, and think you can enter only a dollar amount in the Discount column, you are wrong. Even though it shows a dollar symbol, this field accepts a percentage as well. Just enter your percent value and symbol (say 20%) and let BillQuick figure out its dollar value. Similarly, in Expense Log, the Markup column typically accepts percentages. However, if you enter a dollar value and symbol (say $75), BillQuick will reverse calculate the percentage for you. No need for calculators!

Default Messages



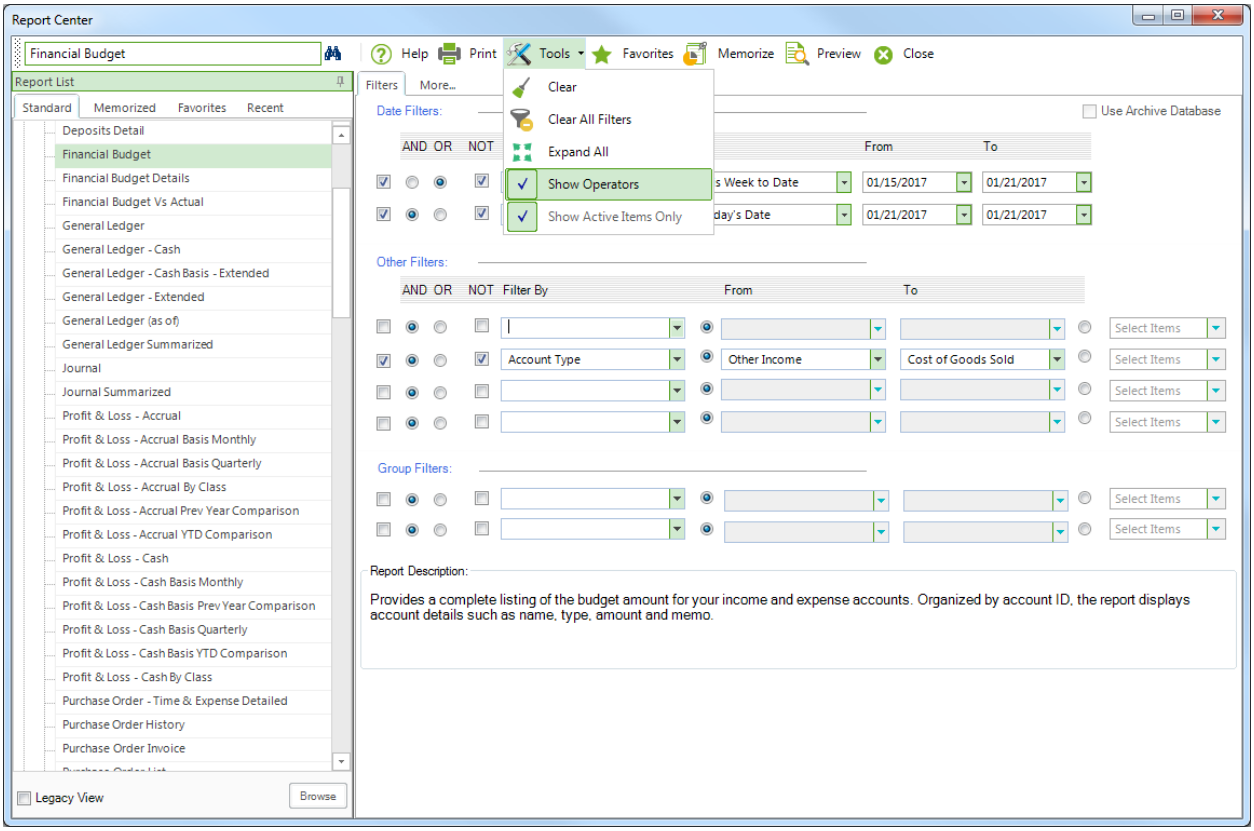
You may get annoyed by some confirmation messages and prompts in BillQuick. We provided a solution for that by letting you turn it off. Check the 'Do not show this message again' option and get rid of it. Now what if you checked it by mistake and want to be prompted for a very important action? No problem! BillQuick gives you an option to reset the message notifications in the User Preferences screen. Click it and you can have them back.

Memorized Reports



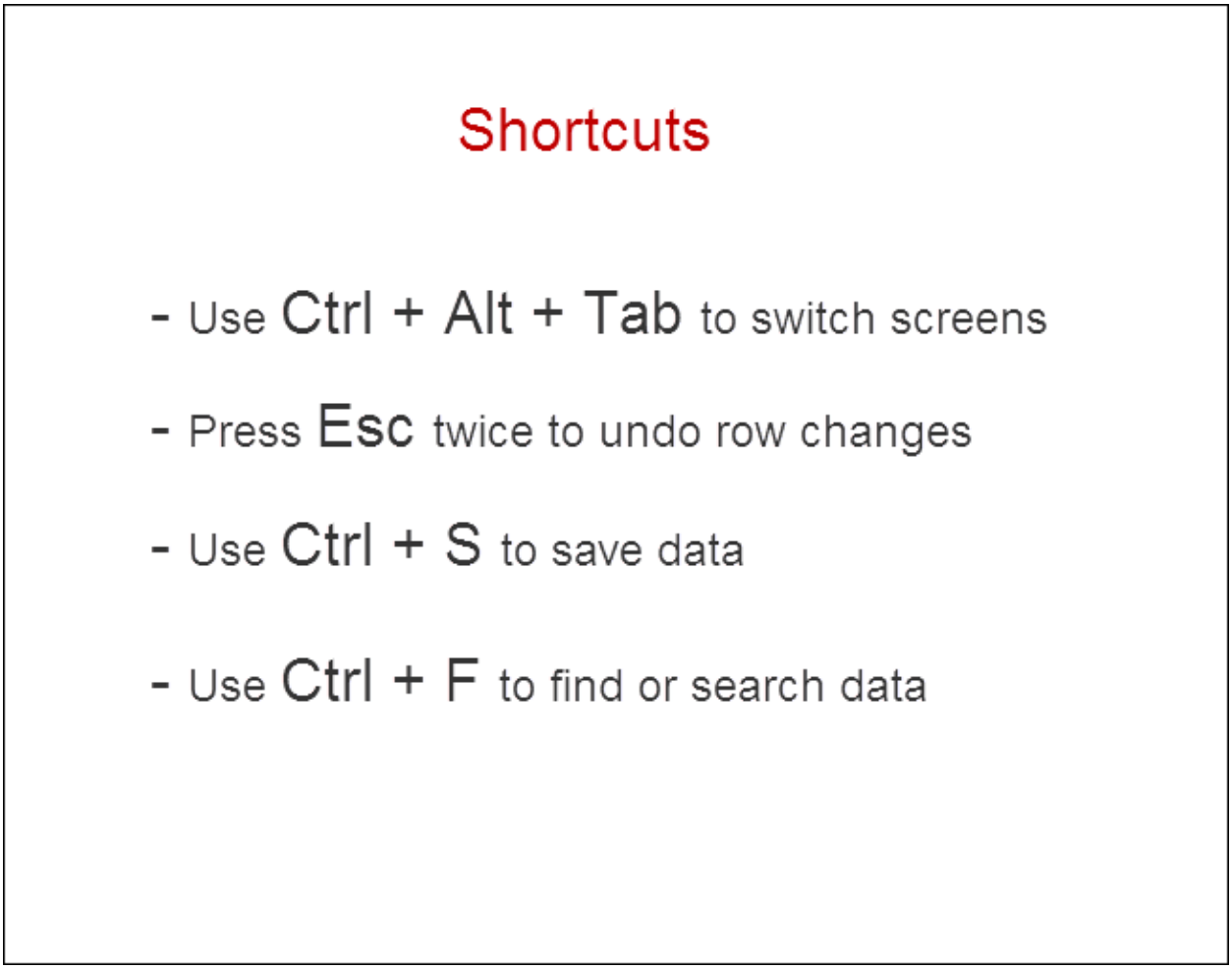
BillQuick allows you to memorize any report along with the applied filters so you can quickly access it via the Reports menu, Memorized Reports list. After previewing the memorized report, what if you want to filter it differently? BillQuick makes this task easy. Just click the Filter icon (added in 2012 version) on the report viewer toolbar and BillQuick will open the report in the Report Center with current filters pre-filled. This new filter icon works on any report, not just the memorized reports.

NOT Filter



The NOT filter has amazing power in analyzing data. Instead of selecting what you want on a report, you can just exclude what you don't want. Sometimes it is much easier to exclude a certain type of data from reports using the NOT filter in the Report Center or Report Filters screen. For example, you may want to run an Employee Utilization report for all of their time records excluding marketing related activities.

Keyboard Shortcuts



Did you know that there are many shortcuts that apply in BillQuick saving you time? Here are a few…

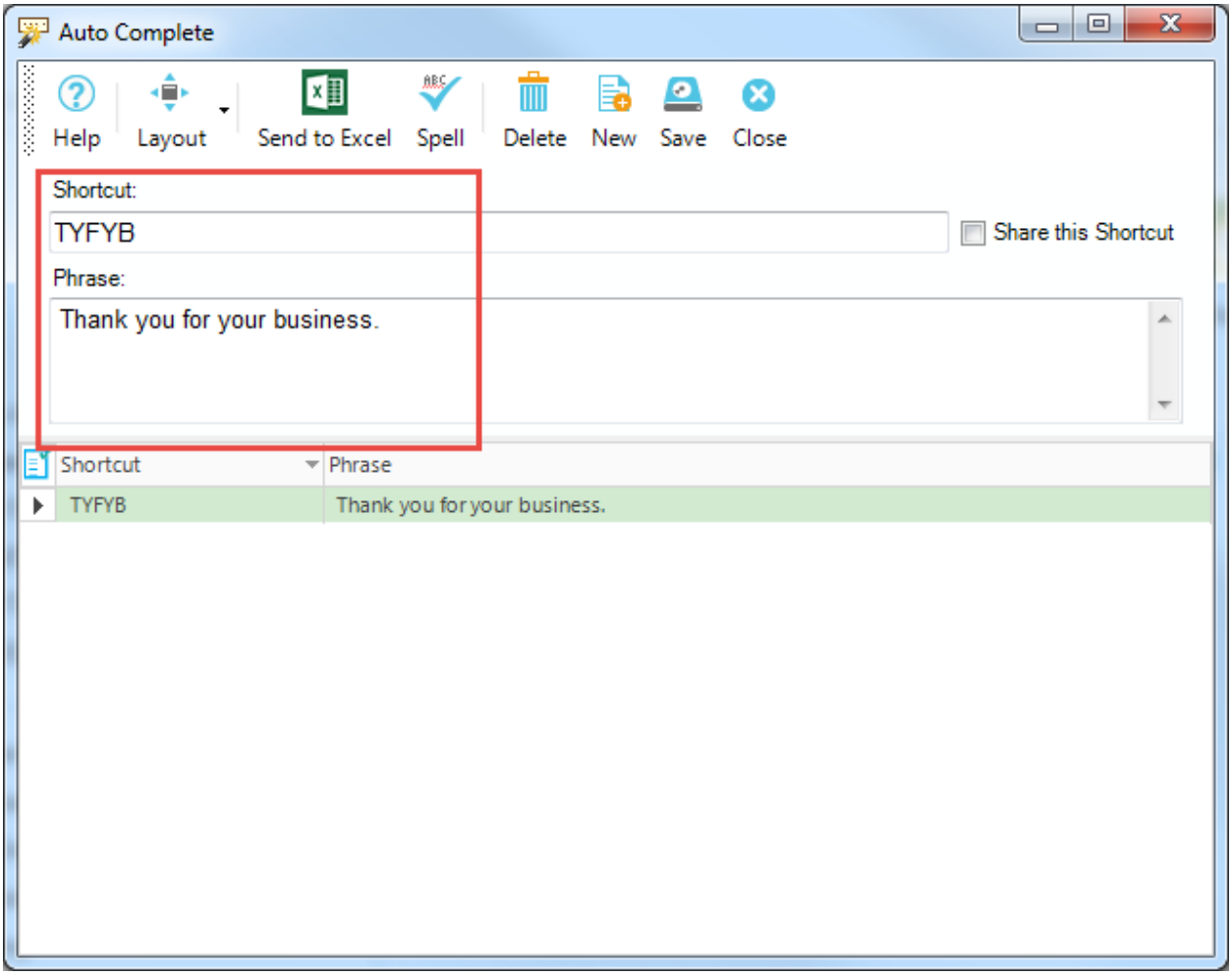
If you have multiple screens open in BillQuick, you can easily and quickly switch between the first and last screen using the Ctrl+Alt+Tab keys. This can be done in both tabbed as well as non-tabbed mode.

You can use the Esc key to undo changes when people make mistakes. For example, while reviewing Expense Log entries, you may mistakenly edit an entry and want to revert to the original state. As long as you haven't saved it, you can undo it by pressing the Esc key twice.

Press Ctrl+S keys to save any data in BillQuick.

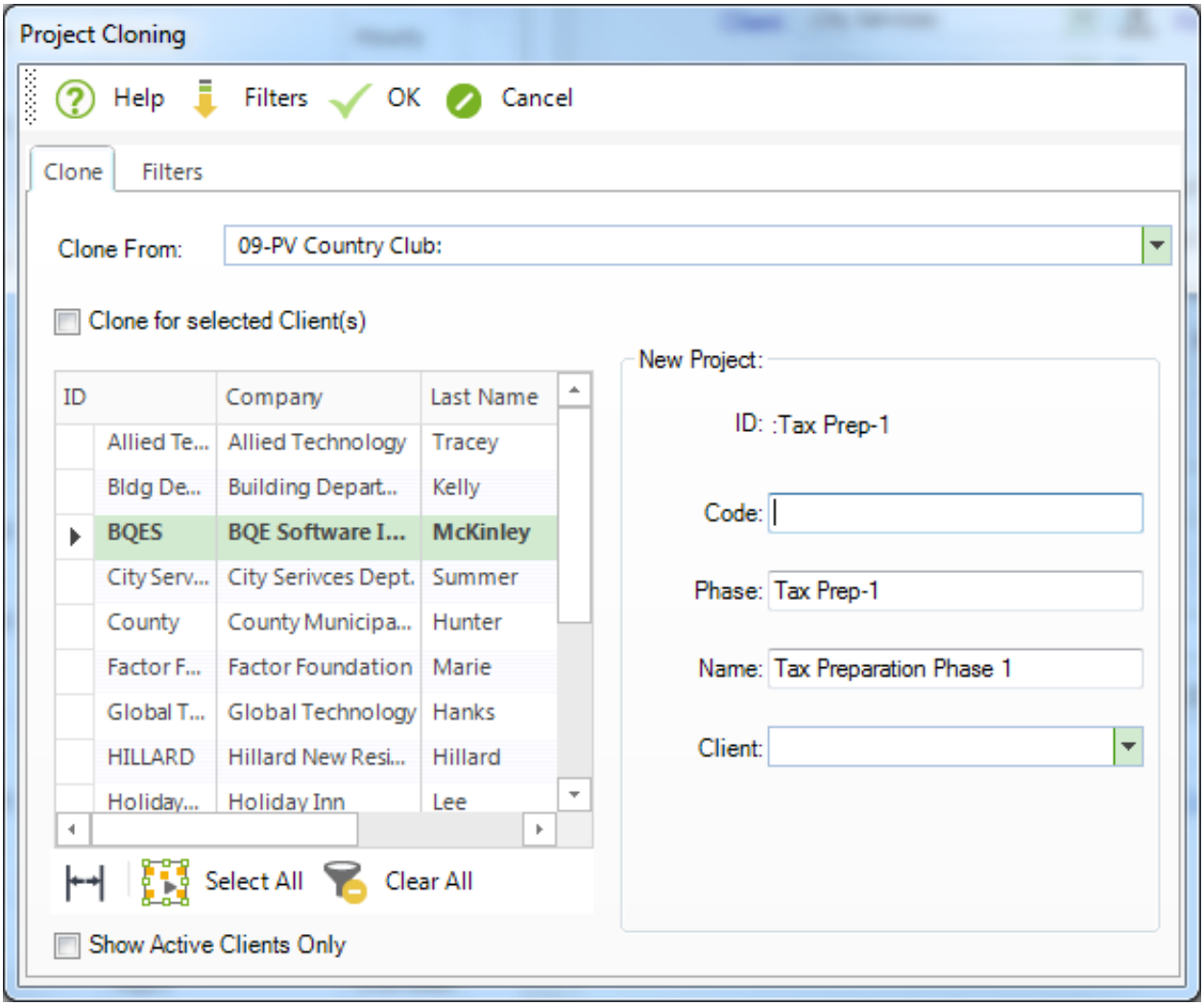
Press Ctrl+F keys to open the Find screen from any BillQuick module. Else, open it from the Edit menu.

Auto Complete



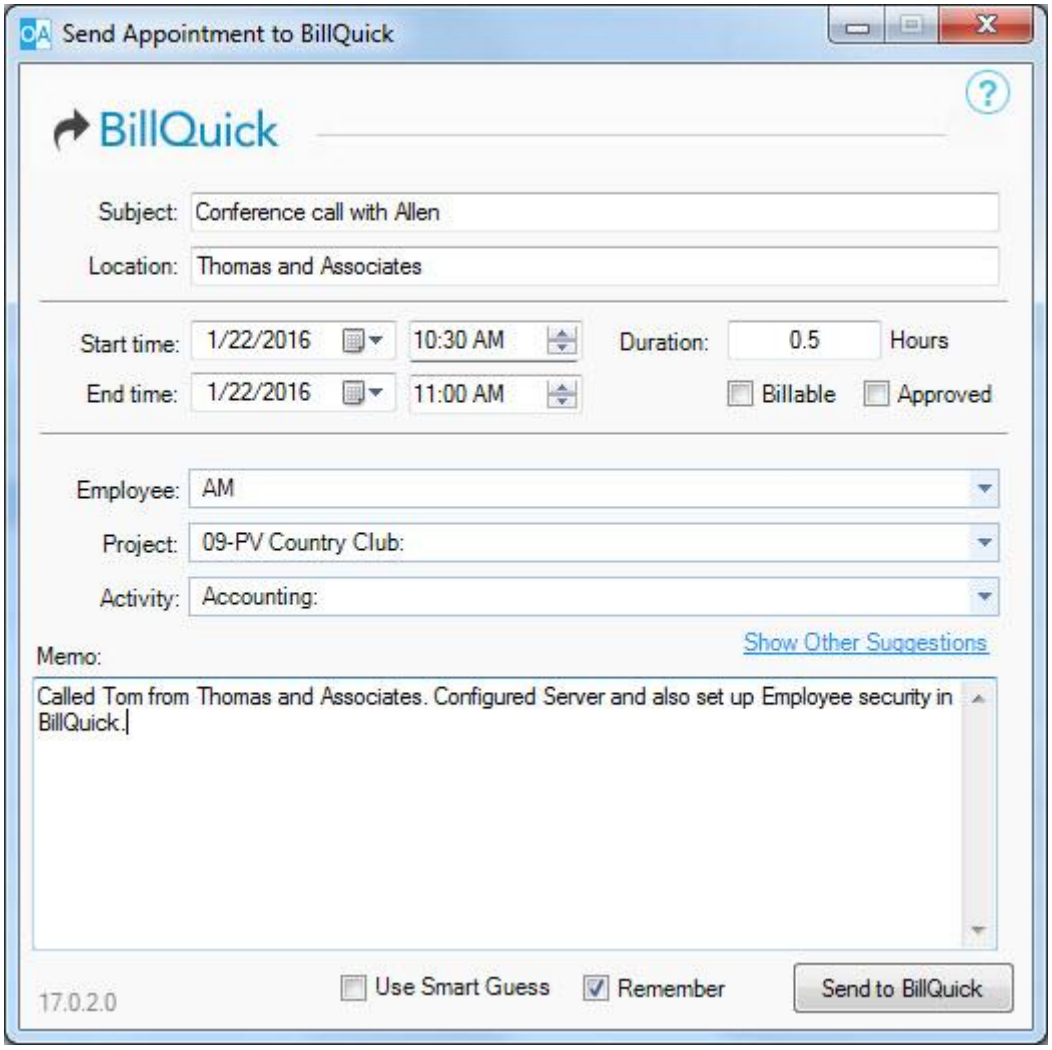
You can save time while recording memos and project notes by using Auto Complete shorthand codes instead of regular text. Just create shorthand codes in the Auto Complete screen and as you type them in a memo or notes box, let BillQuick replace them with the longhand descriptions. Therefore, the next time you want to attach a 'Thank you for your business.' memo to invoices, type 'TYFYB' instead. In fact, you can create these standard messages and notes to be shared by all users throughout BillQuick by checking the 'Is Shared' option at the top.

Batch Clone Projects



At times, you may have to create similar projects or offer similar services to multiple clients. Or you want to maintain separate projects for each fiscal year for a client. For example, as an accounting firm you may deliver tax preparation services to hundreds or thousands of clients every year. If you want to save time in creating similar projects in BillQuick, use its Project Cloning feature. You can create standard project templates, say for residential projects, and then clone them whenever a new job comes up. It allows you to clone a project for one or many clients in bulk while offering some Clone Options. By settings the options, you copy the same profile but with variations that can be further fine-tuned later.

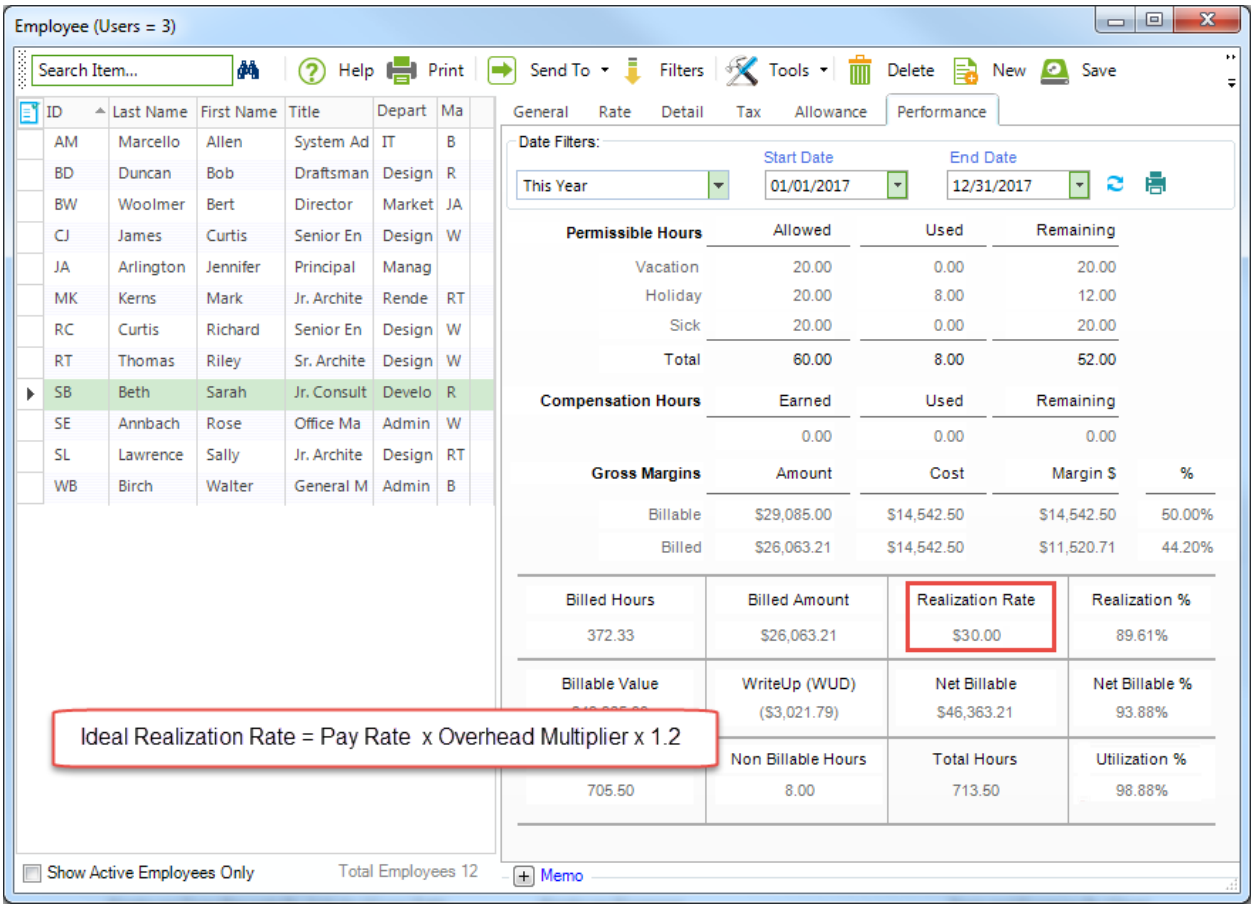
BillQuick Outlook Add-In



If you want to track and bill all your appointments and tasks managed in Microsoft Outlook, BillQuick Outlook Add-In is your solution. It installs inside your Microsoft Outlook as a menu item and all you have to do is right-click any appointment or task and send it to BillQuick. You don't even have to keep BillQuick open. It gets better than that! If you spend many hours reading and writing emails in Outlook, this smart add-in module converts that time to billable time entries in BillQuick. Result? More billing per year, leading to huge benefits. Outlook Add-In figures out which employee, project and activity to use for the time entry, though you can change it anytime.

BETTER MANAGEMENT TIPS

Employee Performance

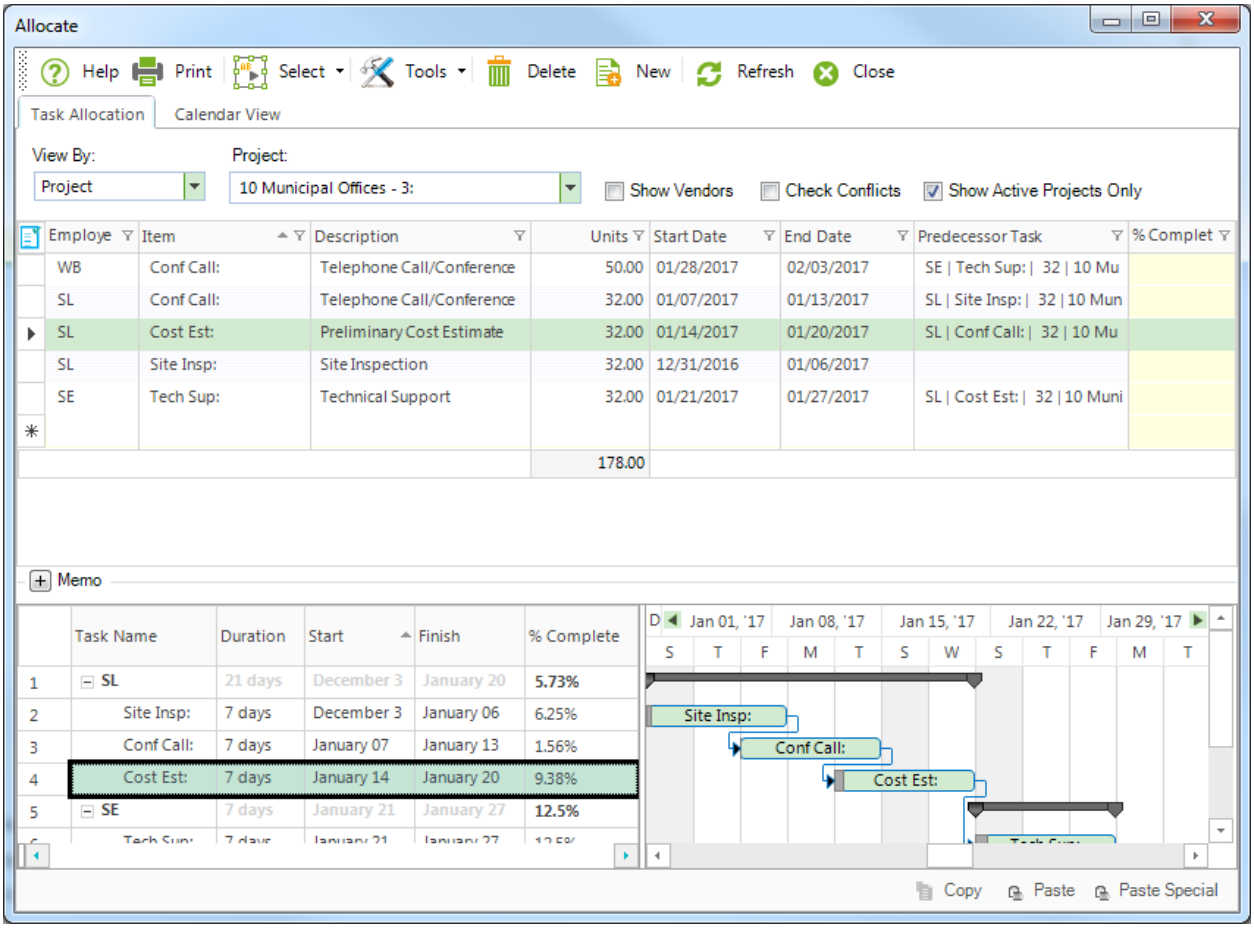


The Performance tab in the Employee screen displays some key performance indicators. You can scan important information about the employee such as gross margins, billable or billed time, and utilization rate for the desired time period. Compare the Bill Rate of the employee (say $70) to his Realization Rate (which may be less, say $30). The whole idea is to give you the right figures to justify the payroll and decide who your rainmakers in the company are and who the bottlenecks are. A low realization rate could be because time entry was written down. Better still, you can compare it with the last year's performance and print a report to share with your employees during review.

The formula for calculation of Realization Rate and Utilization Rate are:

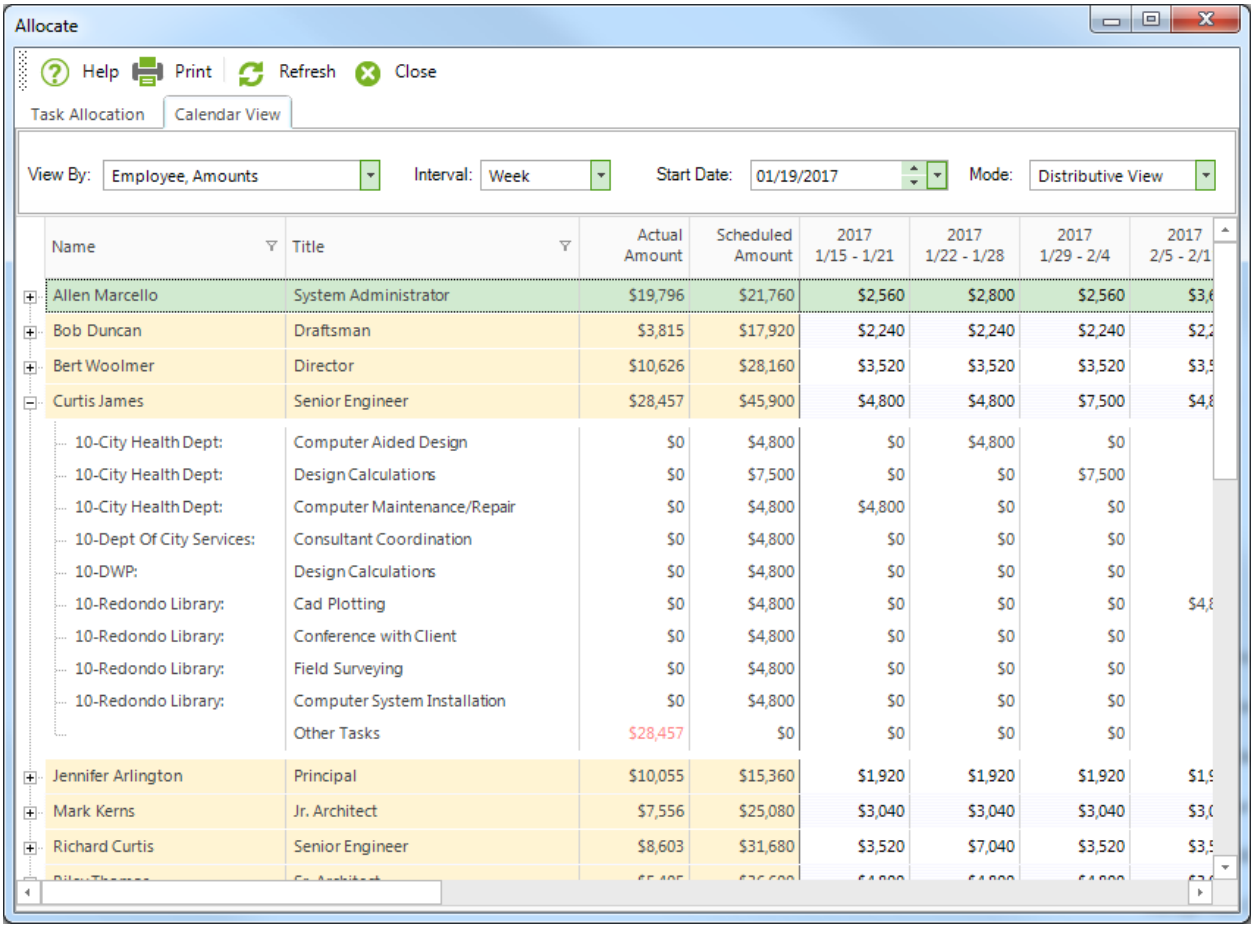
Realization Rate = Billed Amount / Total Hours
Utilization Rate = Billable Hours / Total Hours

Self-Policing Via Allocation



The main cause for low profits is project overruns and, in turn, its main cause is the fact that employees are unaware of the expectations you have of them. They work on projects with no clue about budgets and deadlines. Give them a certain budget and they will finish tasks on time. The self-policing feature in BillQuick allows you to allocate tasks, hours, expense units, and start-end dates to an employee or a group of employees in the Allocate screen. It only gets better. If you already have a budget for a project, just import it to save time and effort. Then directly share these allocations with your employees via email and have them add it to their Outlook calendars. On entering time, they can see these assignments in the status bar. They get real-time feedback on what has been used and what is left on their time.

Revenue Forecasting



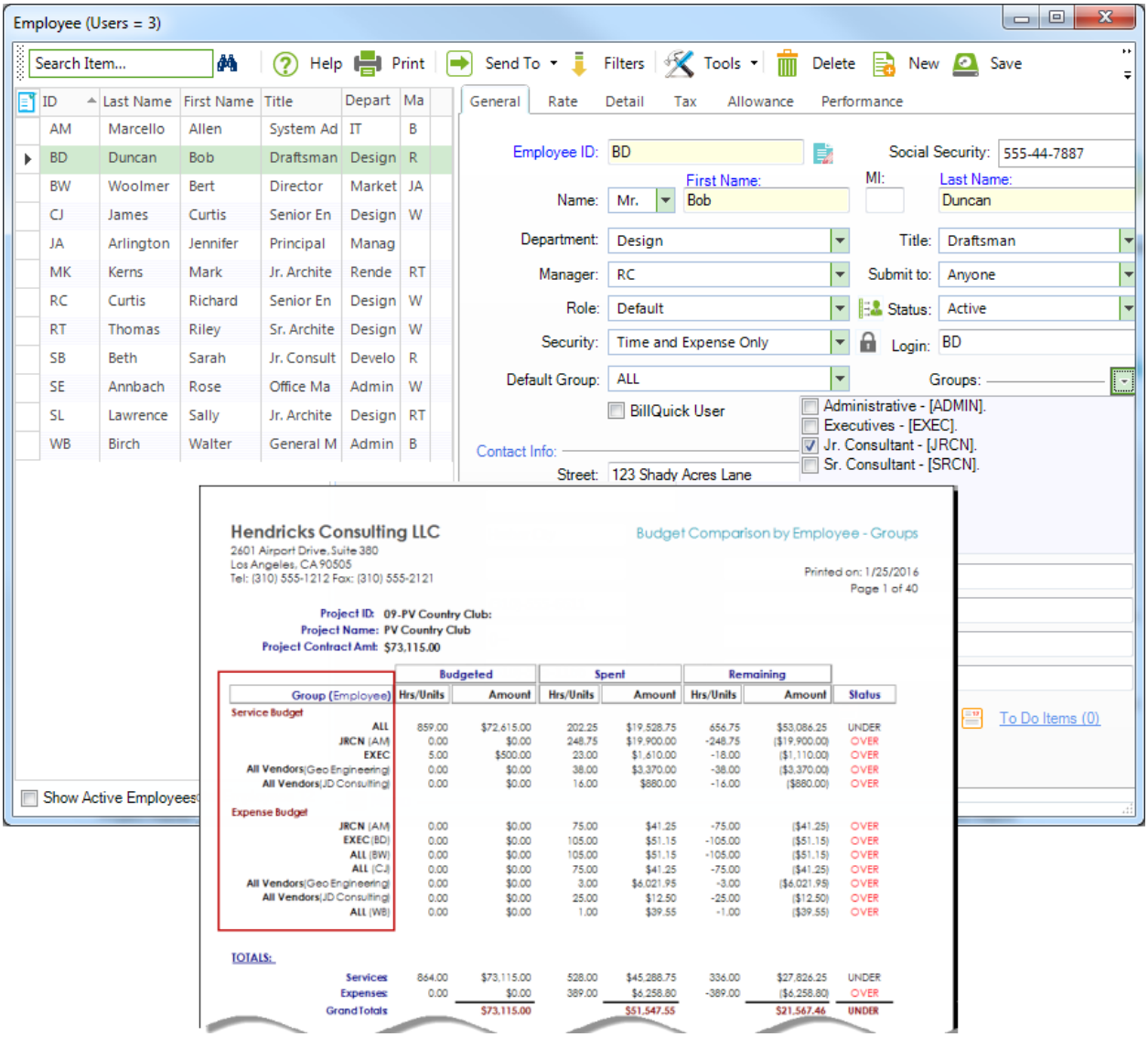
Name	Title	Actual Amount	Scheduled Amount	2017 1/15 - 1/21	2017 1/22 - 1/28	2017 1/29 - 2/4	2017 2/5 - 2/1
Allen Marcello	System Administrator	$19,796	$21,760	$2,560	$2,800	$2,560	$3,6
Bob Duncan	Draftsman	$3,815	$17,920	$2,240	$2,240	$2,240	$2,2
Bert Woolmer	Director	$10,626	$28,160	$3,520	$3,520	$3,520	$3,5
Curtis James	Senior Engineer	$28,457	$45,900	$4,800	$4,800	$7,500	$4,8
10-City Health Dept:	Computer Aided Design	$0	$4,800	$0	$4,800	$0	
10-City Health Dept:	Design Calculations	$0	$7,500	$0	$0	$7,500	
10-City Health Dept:	Computer Maintenance/Repair	$0	$4,800	$4,800	$0	$0	
10-Dept Of City Services:	Consultant Coordination	$0	$4,800	$0	$0	$0	
10-DWP:	Design Calculations	$0	$4,800	$0	$0	$0	
10-Redondo Library:	Cad Plotting	$0	$4,800	$0	$0	$0	$4,8
10-Redondo Library:	Conference with Client	$0	$4,800	$0	$0	$0	
10-Redondo Library:	Field Surveying	$0	$4,800	$0	$0	$0	
10-Redondo Library:	Computer System Installation	$0	$4,800	$0	$0	$0	
	Other Tasks	$28,457	$0	$0	$0	$0	
Jennifer Arlington	Principal	$10,055	$15,360	$1,920	$1,920	$1,920	$1,9
Mark Kerns	Jr. Architect	$7,556	$25,080	$3,040	$3,040	$3,040	$3,0
Richard Curtis	Senior Engineer	$8,603	$31,680	$3,520	$7,040	$3,520	$3,5

The Allocation feature in BillQuick enables you to forecast your workload as well as revenue after assigning tasks to employees on the relevant projects. This helps you avoid financial surprises later.

Using its Calendar View, you can view the staff workload forecast (Employee, Hours) for employees on a weekly or monthly basis. It displays their color-coded task assignments on various projects and activities, total scheduled hours and actual hours worked by each. You can also view the revenue forecast (Employee, Amounts) on a weekly or monthly basis. It displays the task assignments of employees on various projects and activities, total scheduled amount and actual amount earned by each till now.

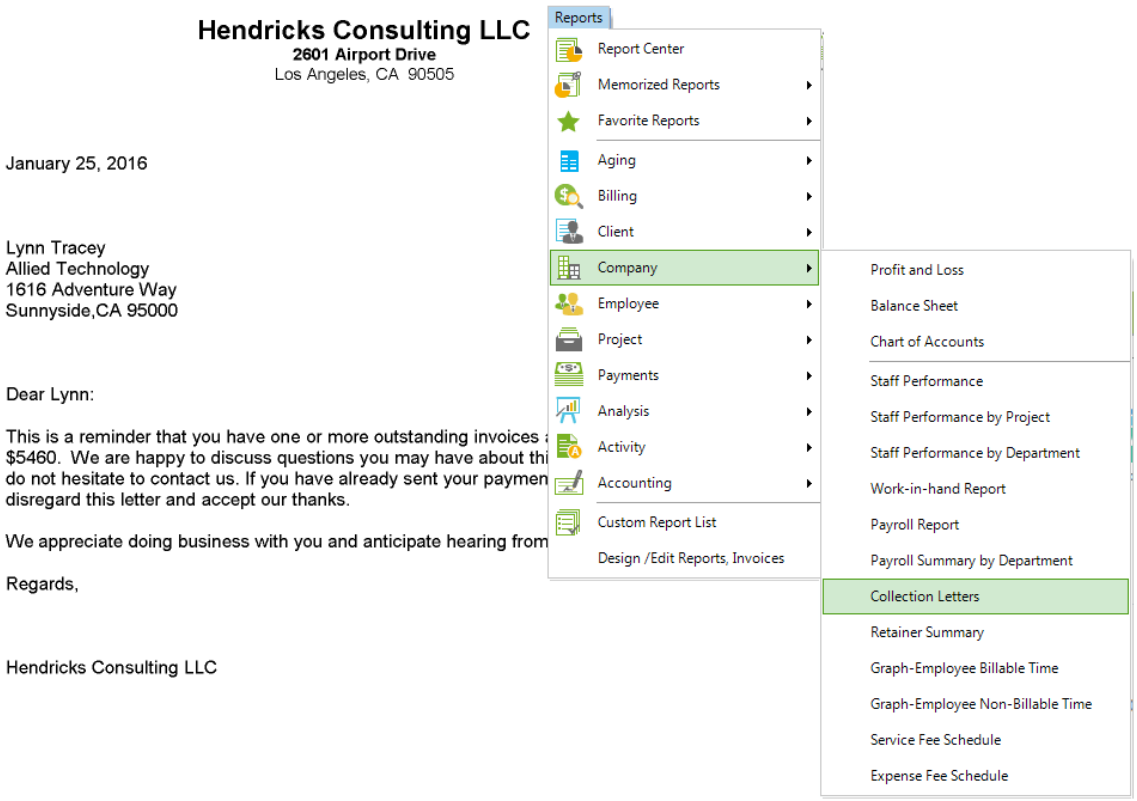
Project managers can view these forecasts on project basis.

Budget by Groups



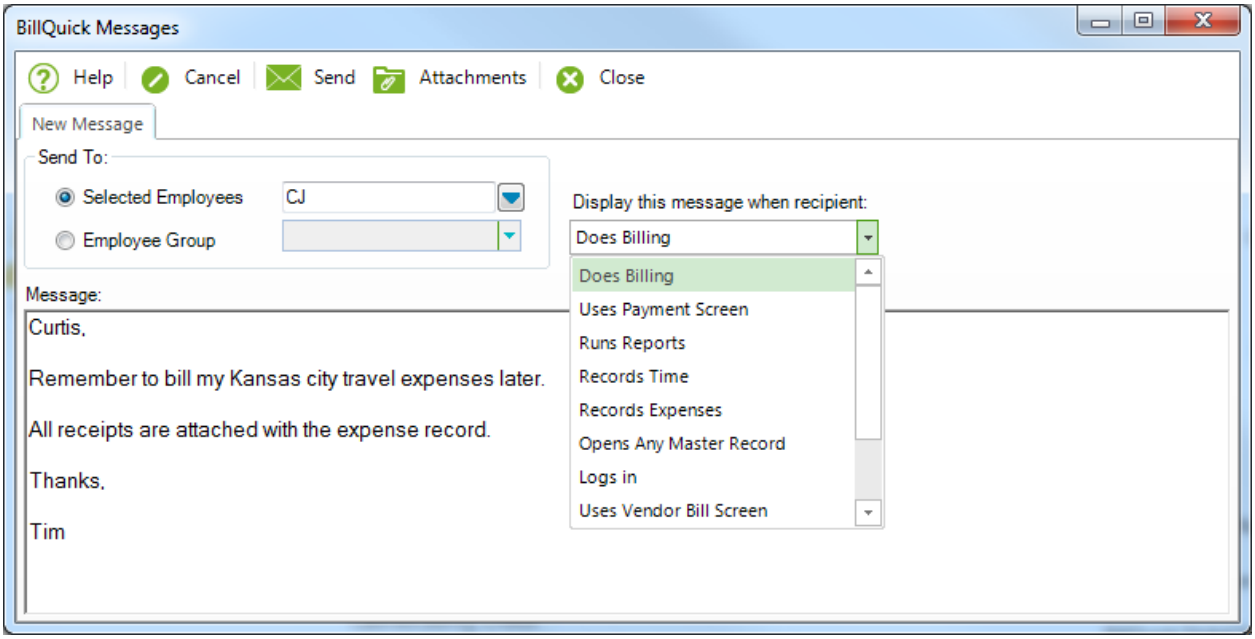
BillQuick allows you to set up dynamic groups for better management and reporting of information. For example, you may group employees by their department and set that as their Default Group. You can then create budgets quickly using these groups instead of individual employees. On reports such as Budget Comparison, you can view and filter data by these employee groups. The same can be done for activities and other items.

Collection Letters



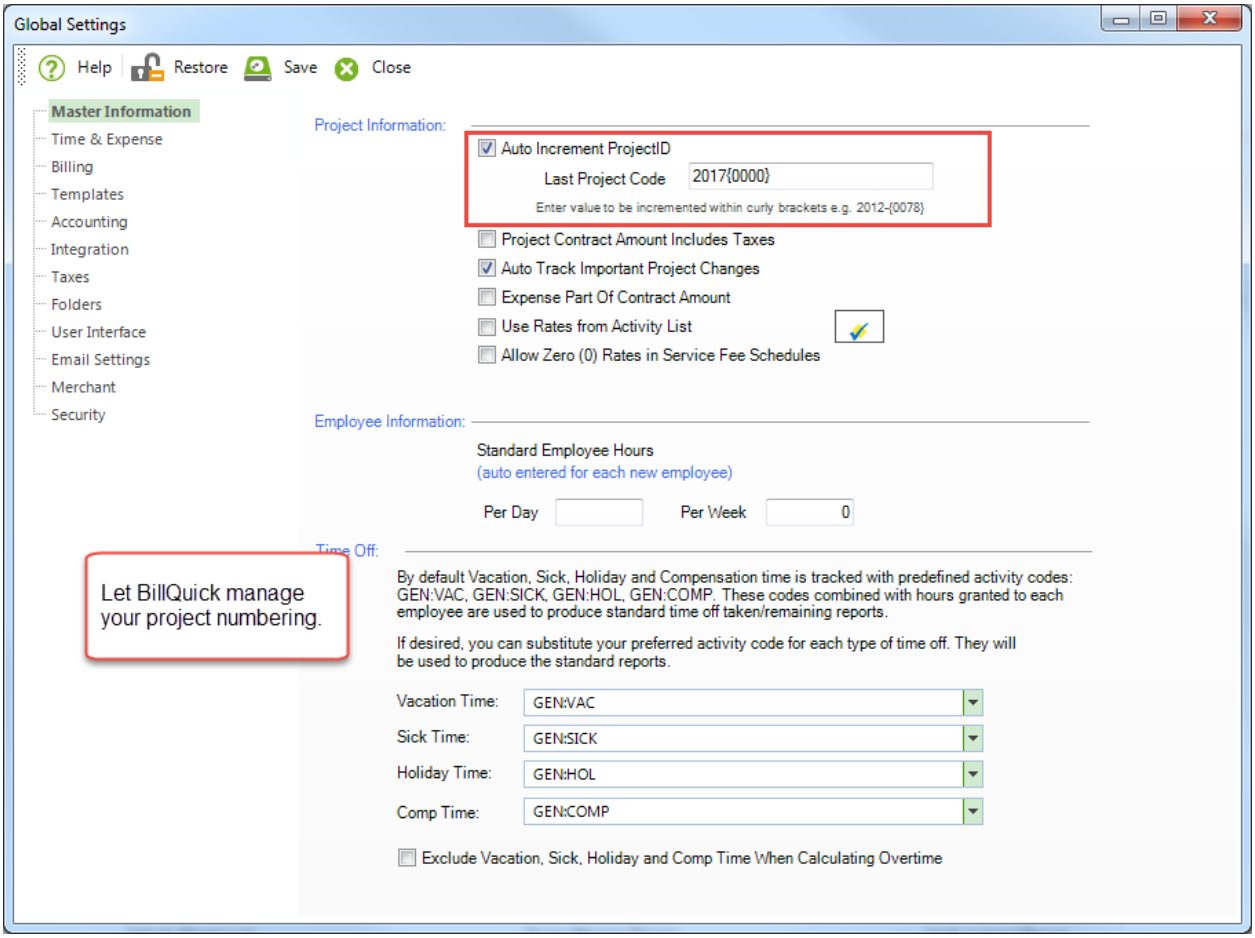
People go through multiple steps to create and send collection letters. BillQuick has an efficient built-in system for that. You can run collection letters from the Reports menu, Company. It opens up in Microsoft Word where you can edit them, if needed. BillQuick pre-fills it with the mailing address, company name and amount owed (aging). No need to figure out your aging manually. Depending upon how long the invoice has been outstanding, it figures out which template to use—first, second or final notice. All you do is print it and mail it.

In-App Messaging



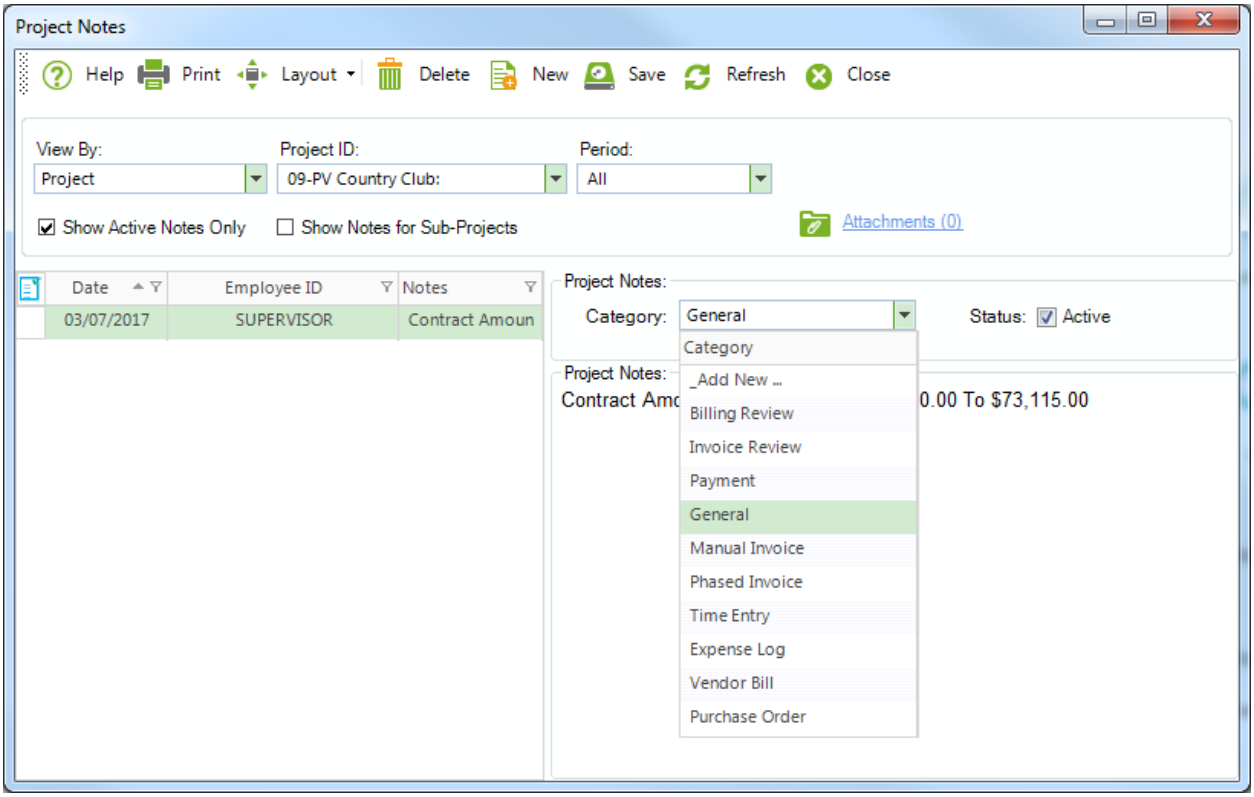
It is common for employees to send messages to people related to business via email but with so many emails to read and catch on, they are lost. Here also, BillQuick comes to your rescue with the event-driven messaging capability. You can send messages to your co-workers, managers, or vendors and specify the trigger event. For example, display the message when the recipient does billing, records time or logs in. This is very effective because the message pops up at the right time and makes its mark.

Project Auto-Numbering



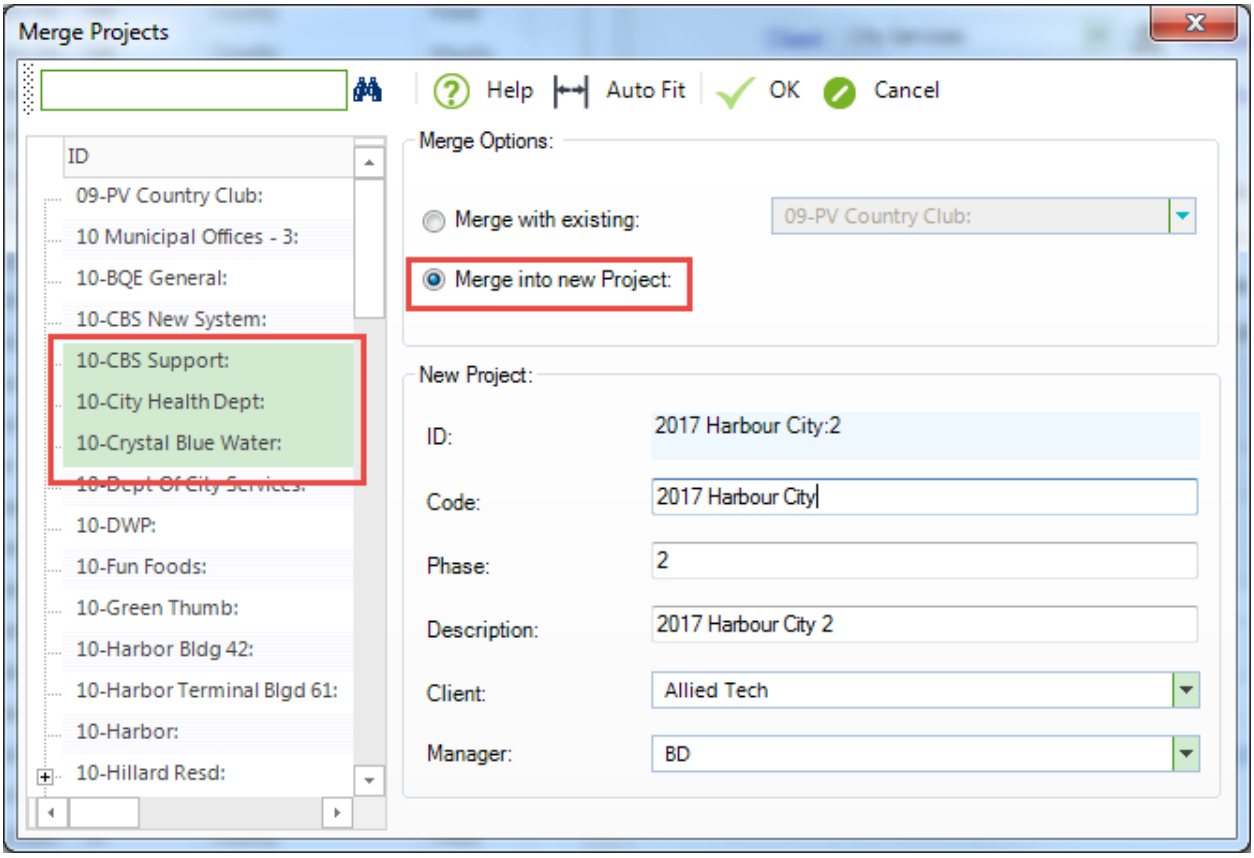
If you want to follow an automatic numbering sequence for your projects, use the Auto-Increment feature. Specify the format in the Global Settings screen and have BillQuick increment the value within the curly brackets. For example, you may want to number your projects by year, such as 2017-0001 or 2017-0002. Hence, you would specify 2017-{0000} as your format and let BillQuick do the rest!

Project Notes



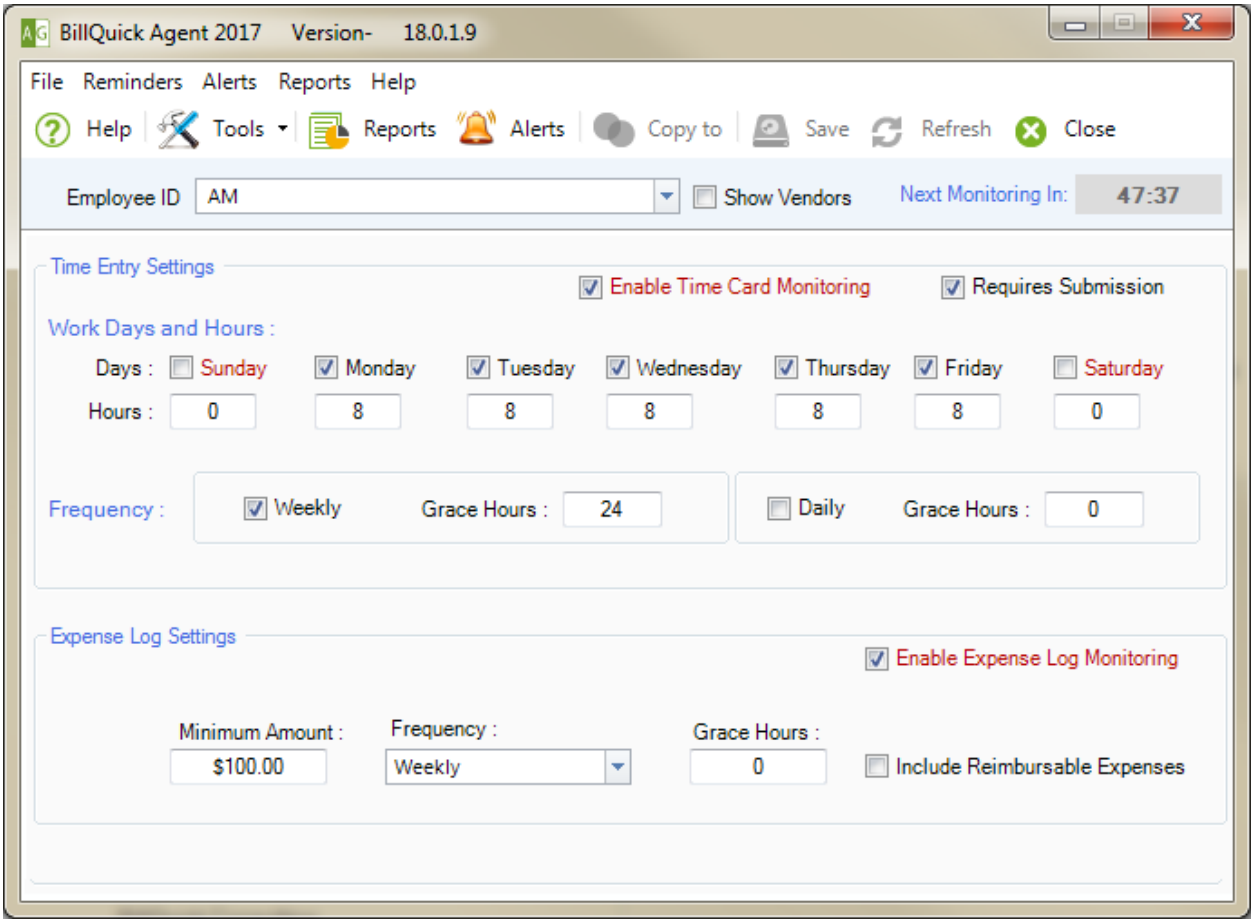
You can keep a qualitative as well as quantitative record of everything related to your projects in BillQuick. With the Project Notes feature, you can add notes to your projects, time and expense entries, bills, invoices, and so on. To top it all, you can create your own notes categories and even link files to them.

Project Merge



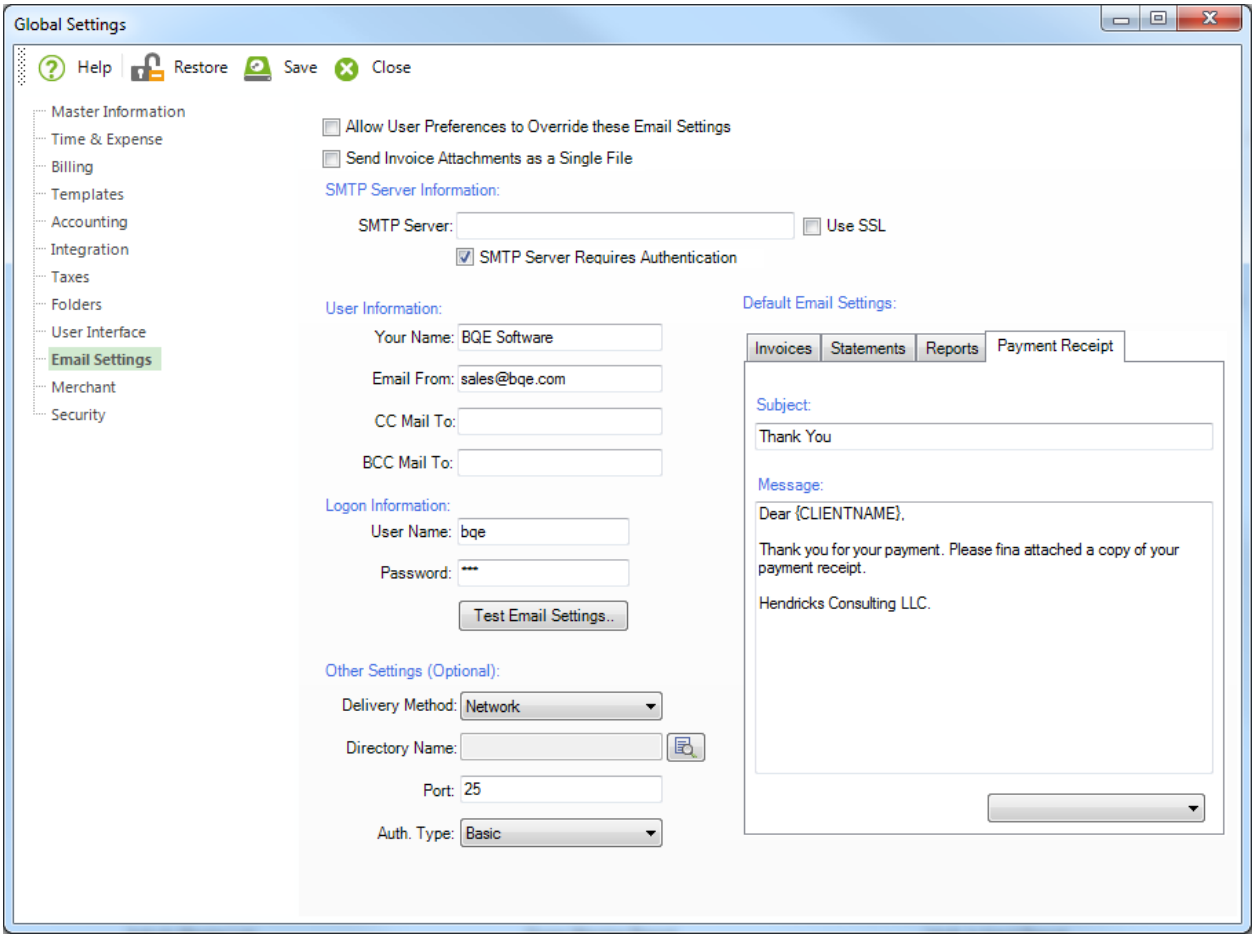
Sometimes, two people may have created the same project in BillQuick and later realized the mistake. Or you may have similar projects in different locations and at some point want to combine them into one. BillQuick allows you to merge projects and combine their hours, expenses, and accounts automatically. You can merge them into a new project or an existing one. In the latter case, the project you are merging into will have its settings retained, such as project manager and contract type.

Time Card Monitoring



Tired of reminding your employees to submit their time cards? Use BillQuick Agent to monitor their time cards at the desired frequency, say weekly. As you get time entry notifications for incomplete and missing time cards, you can send email reminders to delinquent timekeepers as well as their managers manually or automatically. This avoids any delays in time card submissions, approval, and billing, ultimately preventing any cash flow issue. Agent can also run as a service in the background and hence you can install it on your server.

Smart Payment Receipts



Do you want to send a Thank You note to your clients along with a payment receipt? Better yet, do you want to automate this process? If yes, then this feature is just right for you. All you need to do is enter a default Payment Receipt message in the Global Settings-Email Settings screen and check the option to 'Always Email Payment Receipt to the Client' on its Billing screen. BillQuick is smart enough to email the payment receipts to your clients automatically with your custom message.

Collection Center

Collection Center

Help | Print | Tools | Payment | Preview | Email | Refresh | Close

View by: Project | Project From: 09-PV Country Club: | To: 10-WW New Systems: | Period: All

Client Details:
Mr. Mark Summer
(213) 555-9966
Housing and Urban Development
652 Third Avenue
New York, NY 10001

Invoice Status:
Open | Closed | Posted | Unposted | Draft Invoice | Late Fee

Inv#	Date	Project ID	Project Name	Net Amount Σ	Paid Σ	Balance Σ	S	Pa
1204	04/20/2017	10-HUD Richmond:	Housing and Urban Develop	$15,272.61	$0.00	$15,272.61		
1203	04/20/2017	10-HUD Queens:	Housing and Urban Develop	$5,040.00	$0.00	$5,040.00		
1202	04/20/2017	10-HUD NY:	Housing and Urban Develop	$1,965.00	$0.00	$1,965.00		
1201	04/20/2017	10-HUD Monte Carlo:	Housing and Urban Develop	$6,820.00	$0.00	$6,820.00		
1200	04/20/2017	10-HUD Aspen:	Housing and Urban Develop	$4,775.00	$0.00	$4,775.00		
1199	04/20/2017	10-HUD Add Services:	Housing and Urban Develop	$7,380.00	$0.00	$7,380.00		
1198	04/20/2017	10-Dept Of City Services	Dept. of City Services	$41.25	$0.00	$41.25		
1197	04/20/2017	10 Municipal Offices - 3:	Municipal Offices Technical S	$75.25	$0.00	$75.25		
1196	08/18/2017	10-WW New Systems:	World Wide New Systems	$10,640.00	$0.00	$10,640.00		
1195	08/18/2017	10-Torrance Airport:	Torrance Airport Upgrade	$440.00	$0.00	$440.00		
1194	08/18/2017	10-Redondo Library:	Redondo Beach Library	$200.00	$0.00	$200.00		
1193	08/18/2017	10-Municipal Offices-2:	Municipal Offices Developme	$306.93	$0.00	$306.93		
1192	08/18/2017	10-Municipal Offices:	Municipal Offices Feasibility	$75.00	$0.00	$75.00		
1191	08/18/2017	10-Long Beach Harbor:	Long Beach Harbor - Recurrin	$1,000.00	$0.00	$1,000.00		
1190	08/18/2017	10-HUD Richmond:	Housing and Urban Develop	$7,811.21	$0.00	$7,811.21		

Project Notes

Payment History

Type	Date	Invoice	Amount
			$0.00

Average Invoice Value	Average Hourly Rate	Retainer Balance
$8,881.88	$76.45	$0.00

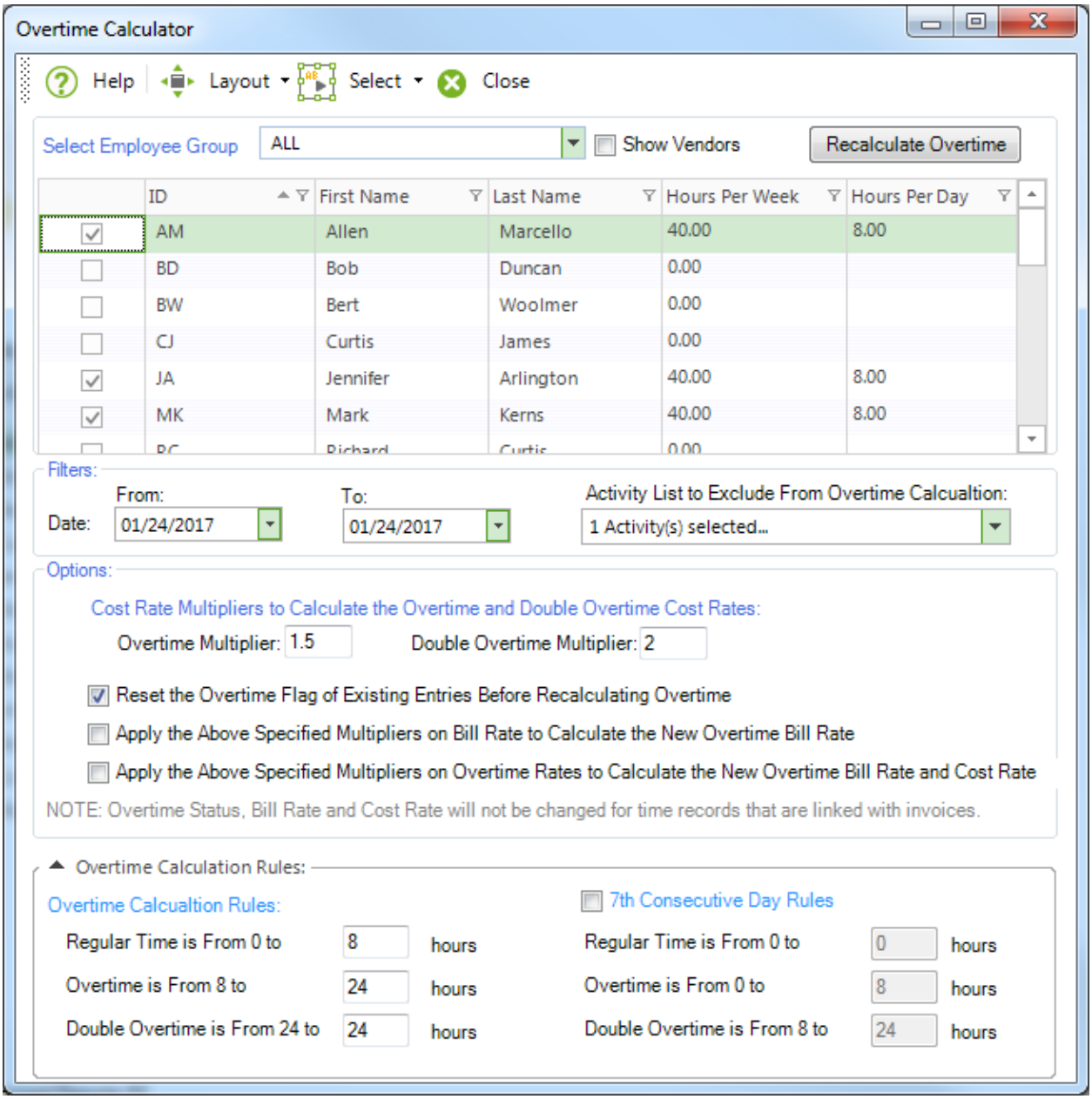
Average Days From:

Time Entry to Invoice	Invoice to Payment	Time Entry to Payment
11 days	Un Paid	11 days

For your business, the longer the money remains blocked with your clients, the more cash flow problems you experience. Fewer outstanding account balances mean fewer bad debts and write-offs, and hence, enhanced profitability. Cash flow is directly controlled by two metrics. (1) Days between the services were provided and the invoice mailed, (2) days between the invoices were mailed and payment received. If you can lower each of these numbers by 15 days, you will experience significant improvements in your cash flow over the next 12 months.

With this in mind, BillQuick now provides a Collection Center to help you keep track of all your outstanding invoices and debts. Using the statistics at the bottom of this screen, you can focus on those that seem to be getting closer to becoming bad debts. The best part is that you have access to the past collection history and other metrics such as the average number of days it takes a client to pay. You can also attach files, and view or add notes to each invoice.

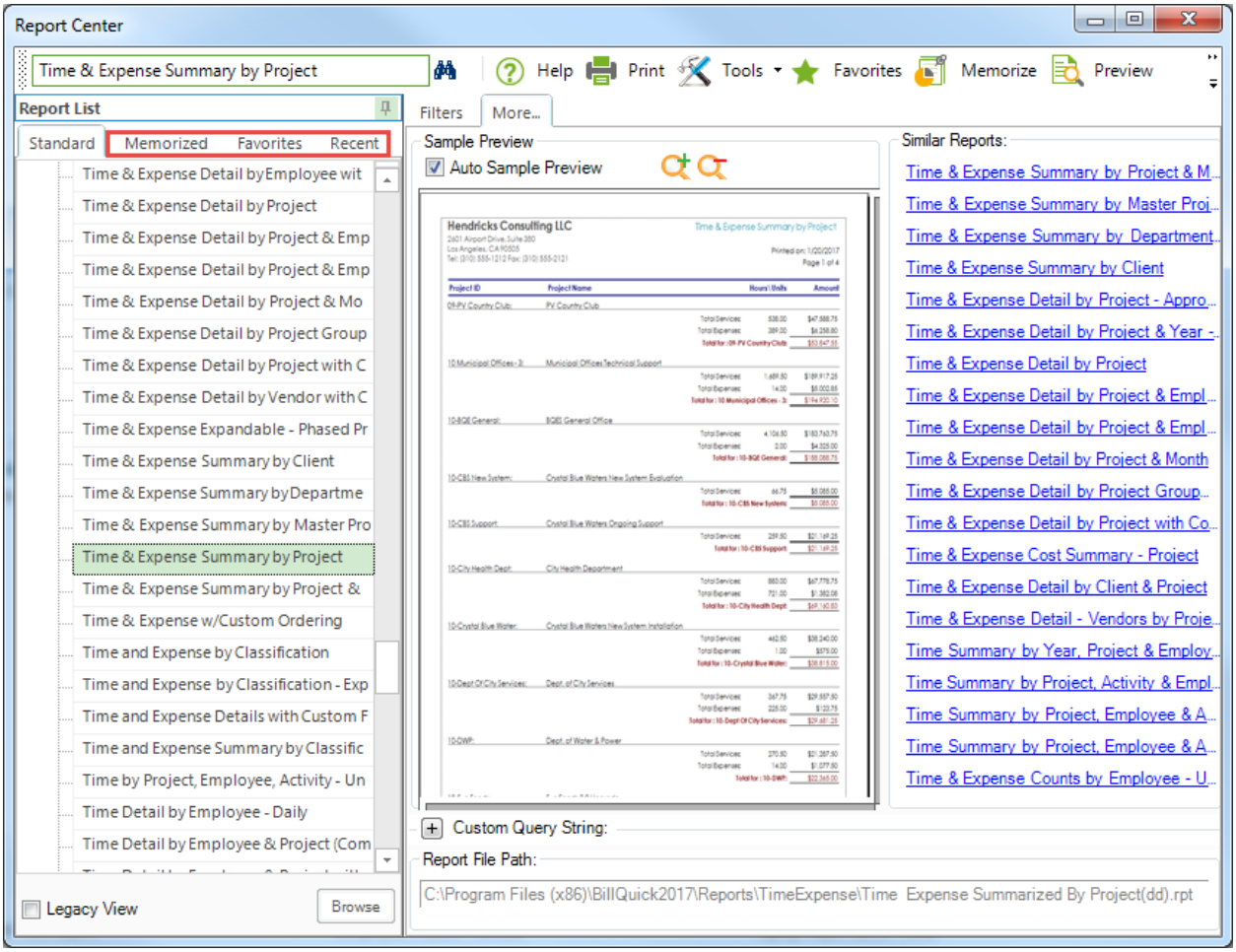
Overtime Calculator



The Overtime Calculator tool analyses timesheets and marks the qualifying entries automatically as overtime using the standard hours from the Employee screen. For example, If the Standard Hours per day = 8 hours, then a 10 hour time entry would be split into an 8 hour regular and 2 hour overtime entry. The associated bill and cost rates will be automatically recalculated by the calculator for billing and payroll purposes. You can have BillQuick apply overtime or double overtime rates for selected employees.

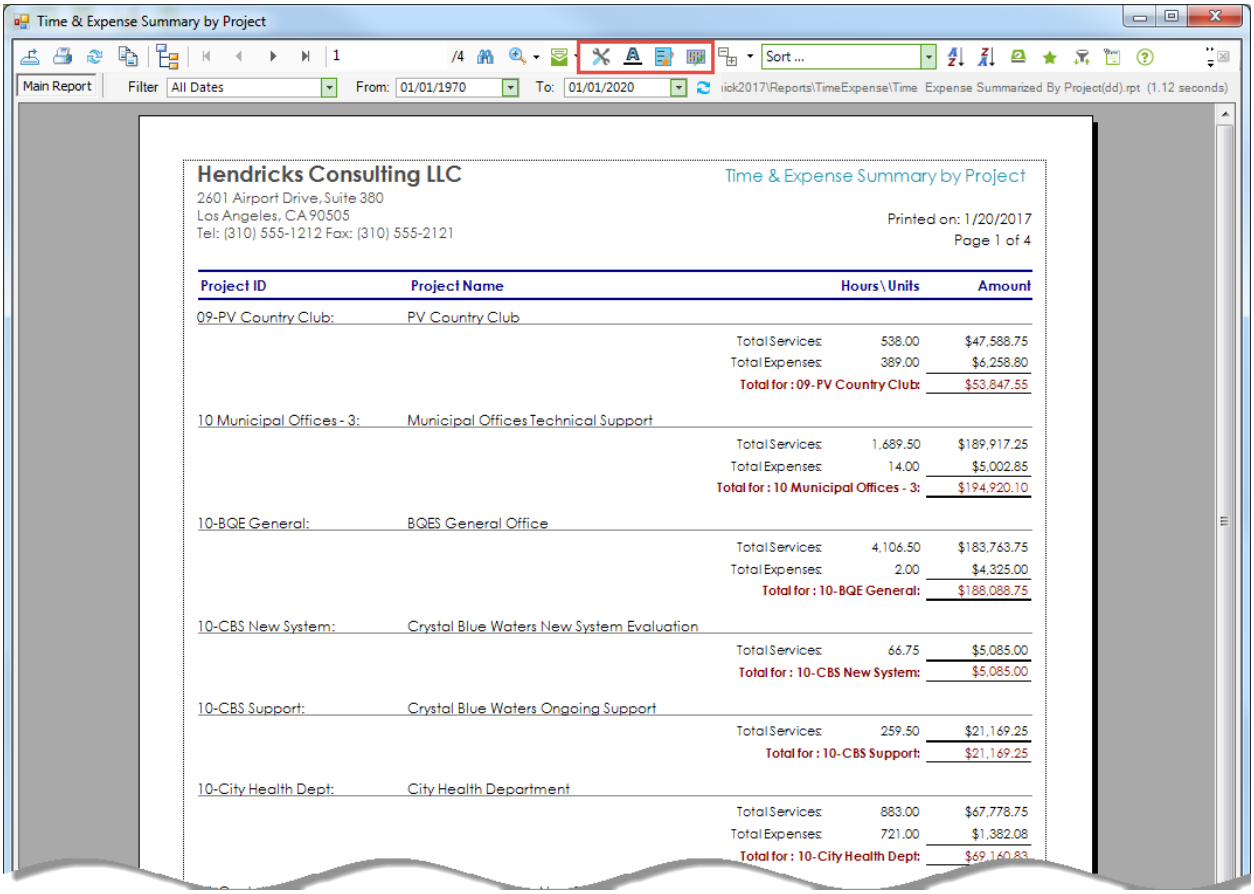
REPORT TIPS

Recent, Favorite and Memorized Reports



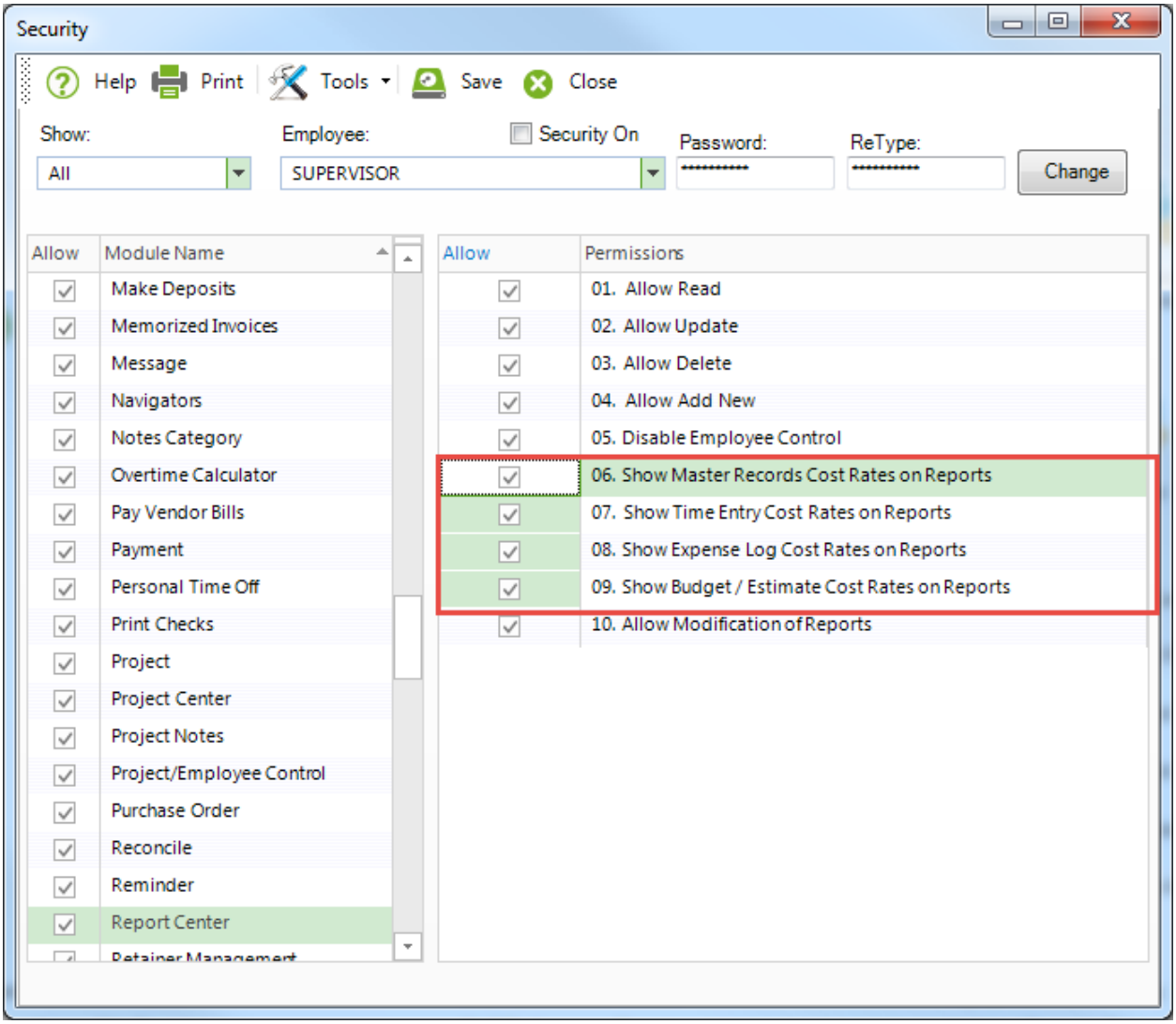
If you run 15-20 reports each day and can't remember which ones they were, it can get confusing and time-consuming to find them again later. The Report Center lists your memorized, favorite, and recently viewed reports on various tabs. With a simple click, you can tag your reports and re-run them at any time. Not only can you select a report to see its sample preview on the More tab, you can also check the list of similar reports available in the 500 plus reports library.

Right-Click Customization



BillQuick allows you to customize your reports to some extent. You can use the shortcut menu or toolbar in the preview window to modify items and fonts on the report. You may show or hide columns on the report, change the size or position of items, add effects to items and change the font settings . . . with just a few clicks. BillQuick also provides filter options on the fly for some reports that allow you to organize the report based on your preference, say ordered by client, project or manager.

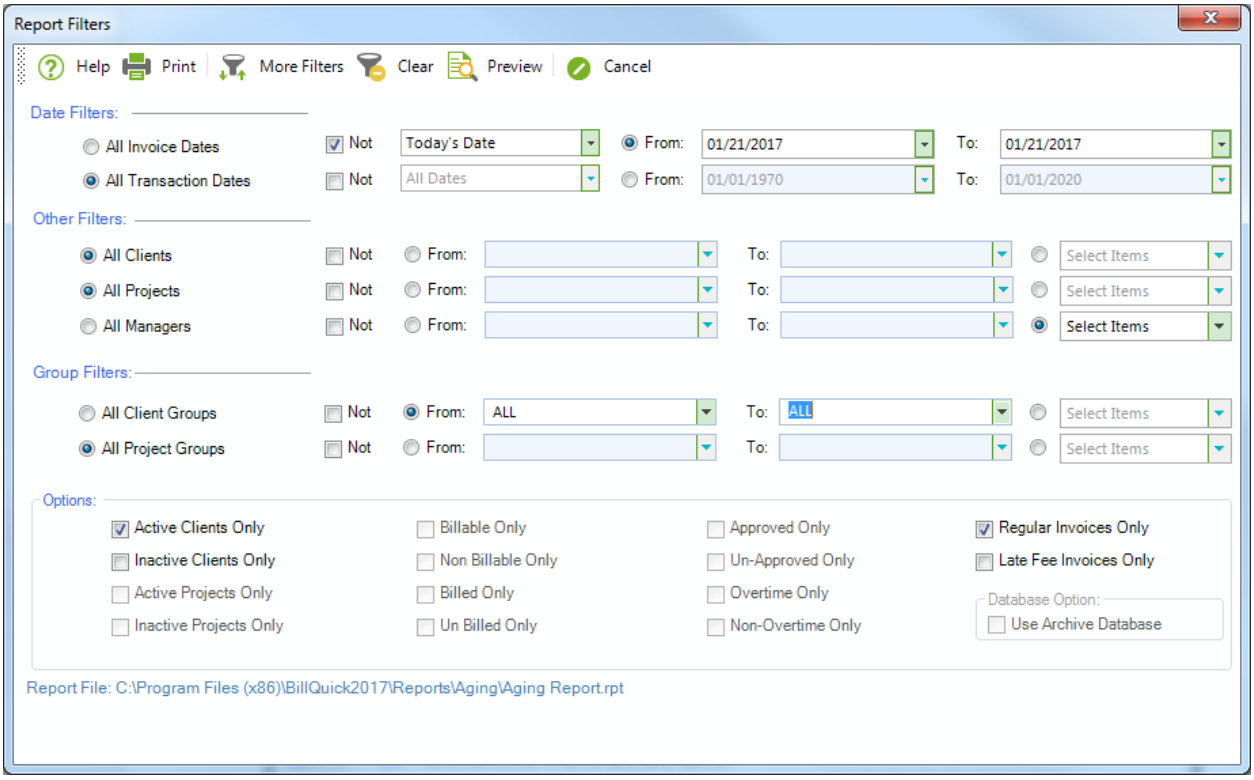
Cost Rates on Reports



With a few clicks, you can prevent unauthorized employees from seeing the cost rates on your reports. Yes, the new security permissions in BillQuick ensure that your confidential information does not appear on reports. For the Report Center module, uncheck the relevant 'Show …Cost Rates on Reports' permissions in the Security screen.

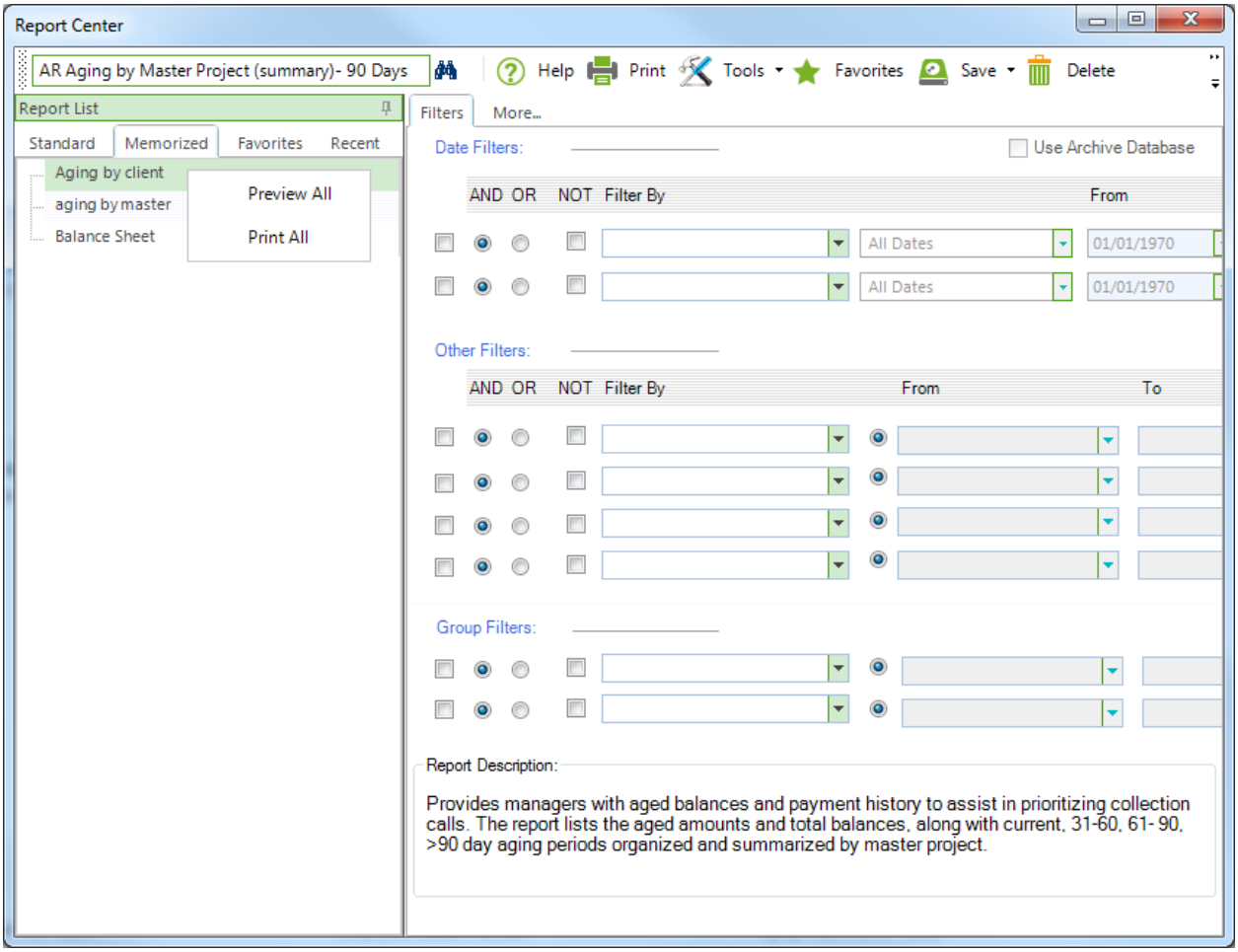
Here is the best part, this works on your custom reports too.

Discrete Items Filters



You know about report filters in BillQuick. However, you may not know that while applying filters, you can select not only a range of items in the From-To drop-down lists but also discrete items in the Select Items drop-down. This is useful when you want to view reports for specific projects, employees, clients or other items. Just check those in the Select Items drop-down and let BillQuick do the rest.

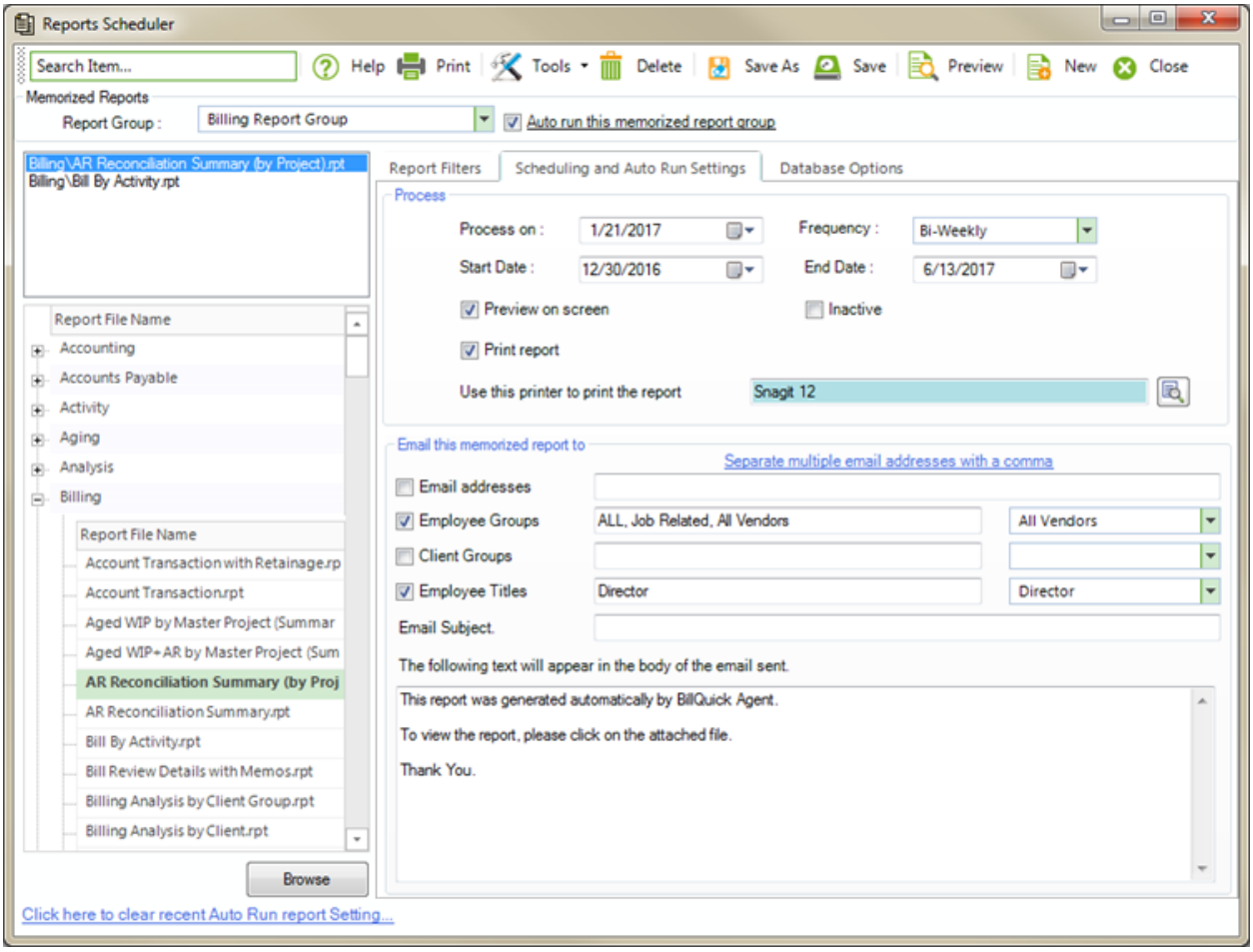
Batch Print Reports



You may be grouping your memorized or favorite reports for better organization. Did you know there is an added benefit in doing so? You now have the ability to batch print or preview the entire set or group of reports with a single mouse-click in Report Center! This can be extremely convenient and a great time-saver for you.

We recommend that you group your memorized reports based on recurring events Billing, Quarter-End, Year-End or Monthly.

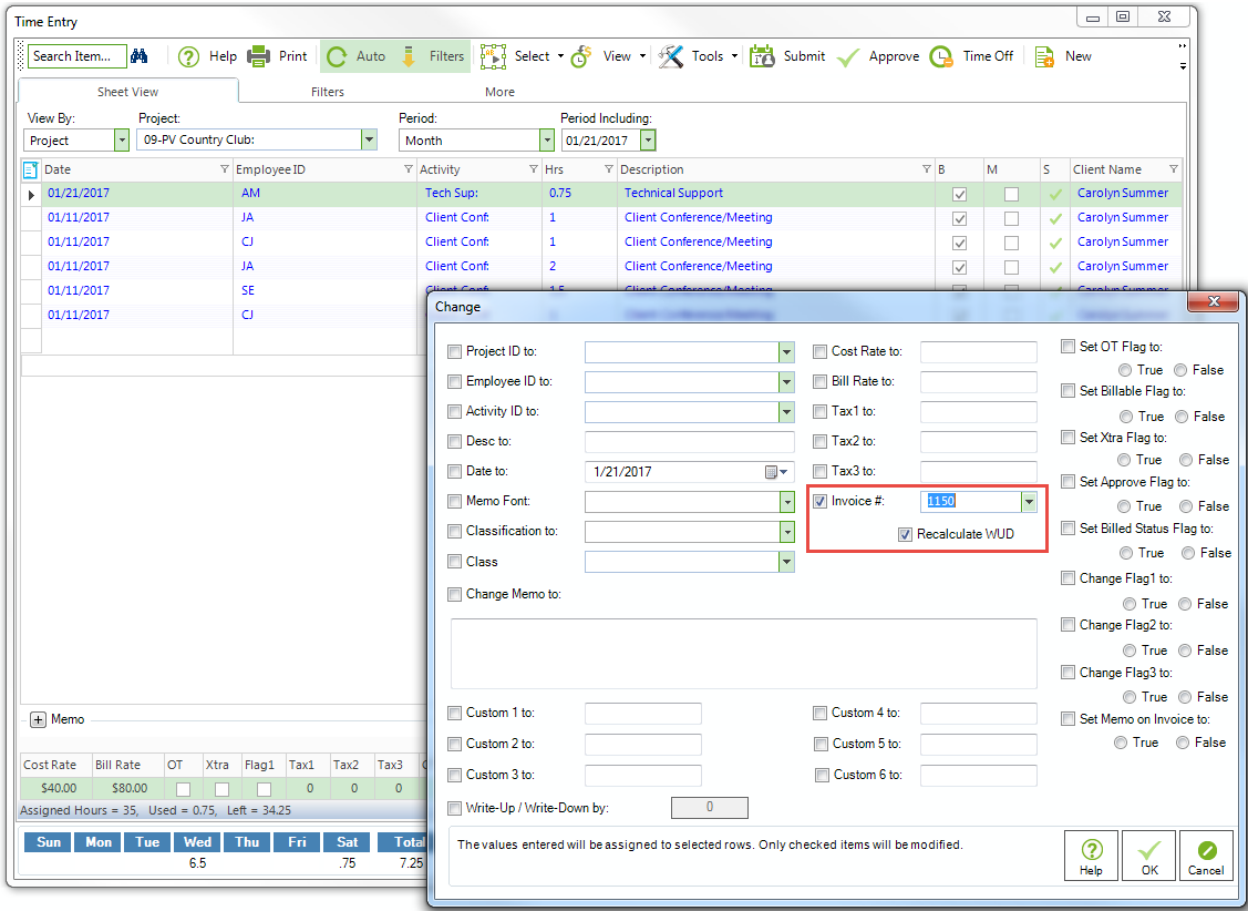
Report Scheduling



Not able to deliver reports on time? Here's the solution. Use BillQuick add-on Agent to schedule your reports and have them delivered automatically to anyone you want, say, project status report to the project manager. Just select the desired report, apply filters, and run it. If all looks good, memorize it and schedule it for automatic generation and delivery via email. Reporting could never get easier and simpler.

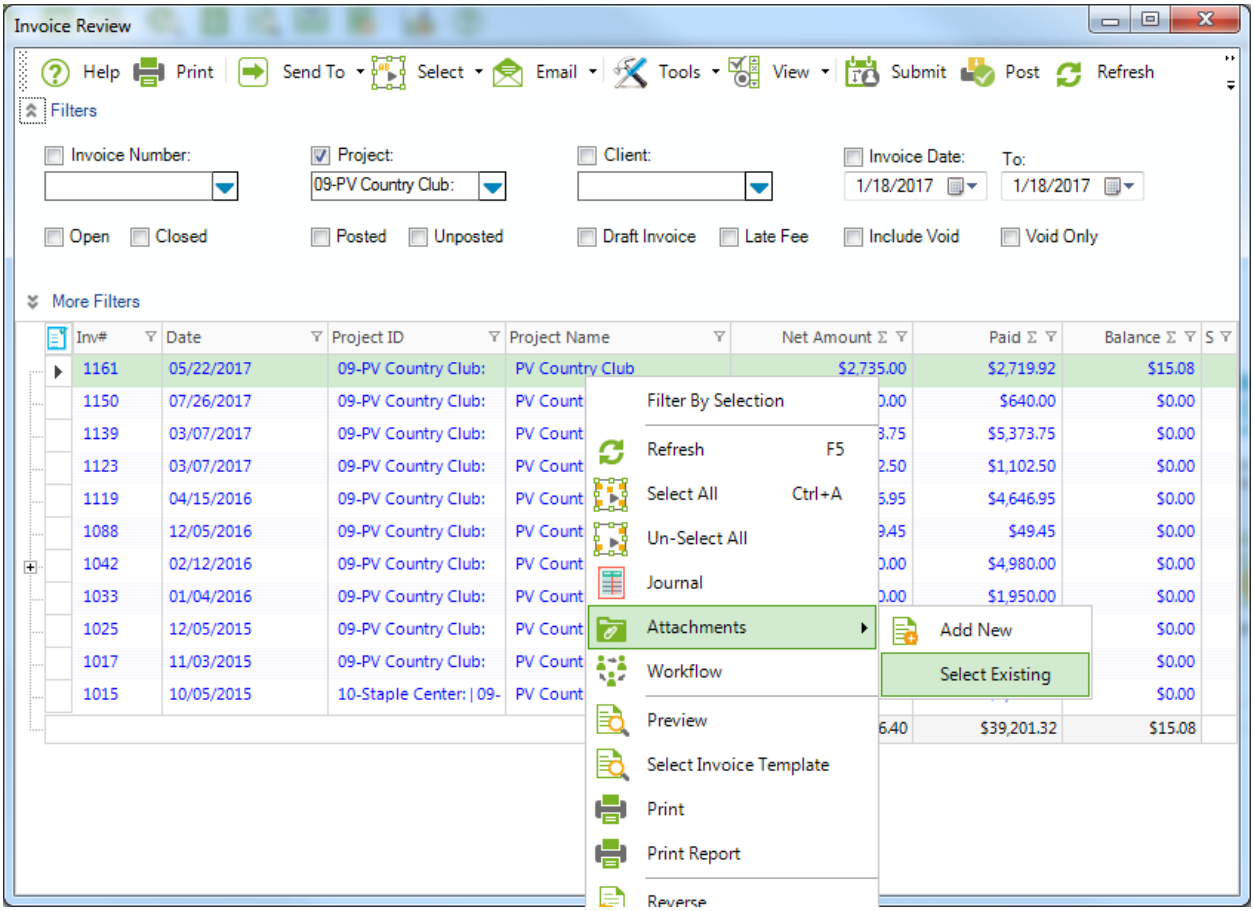
BILLING TIPS

Progress Billing for Time



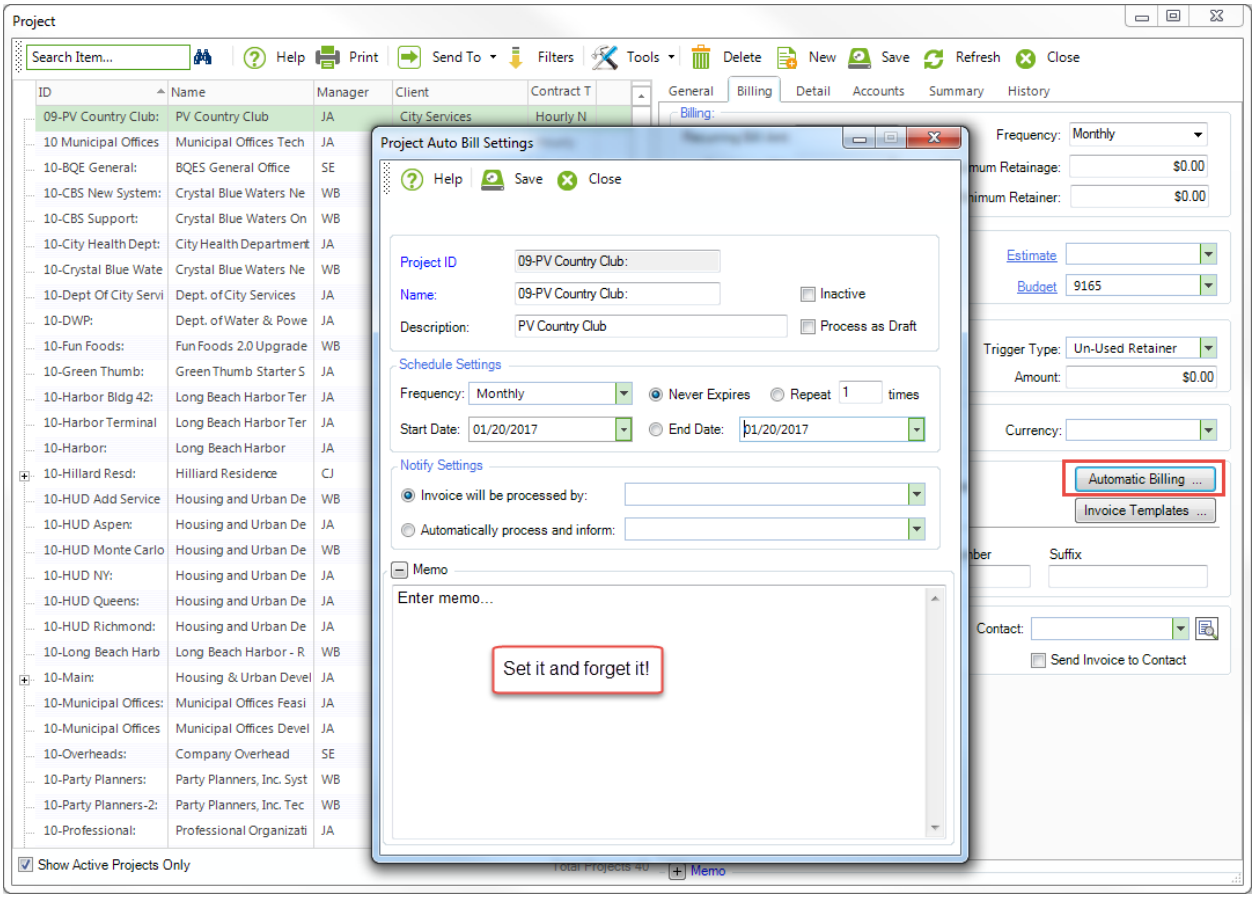
Here's a scenario. You are billing your clients when there are no services or expenses recorded for a project or incomplete time sheets associated with it, or you do progress billing wherein you reconcile your time and expenses later when the project is completed. If you run a Write-Up/Write-Down report, it will either show no WUD or will calculate a WUD that is far from reality. BillQuick allows you to associate unbilled time entries with an existing invoice. Just select the time entries that you want to associate with your invoice and click Tools to open the Change screen. You can pick the relevant invoice from the drop-down and choose to recalculate the WUD. By associating time entries to a previously processed invoice, you now get a realistic picture of the WUD. You can do the same for expense entries!

Invoice Attachments



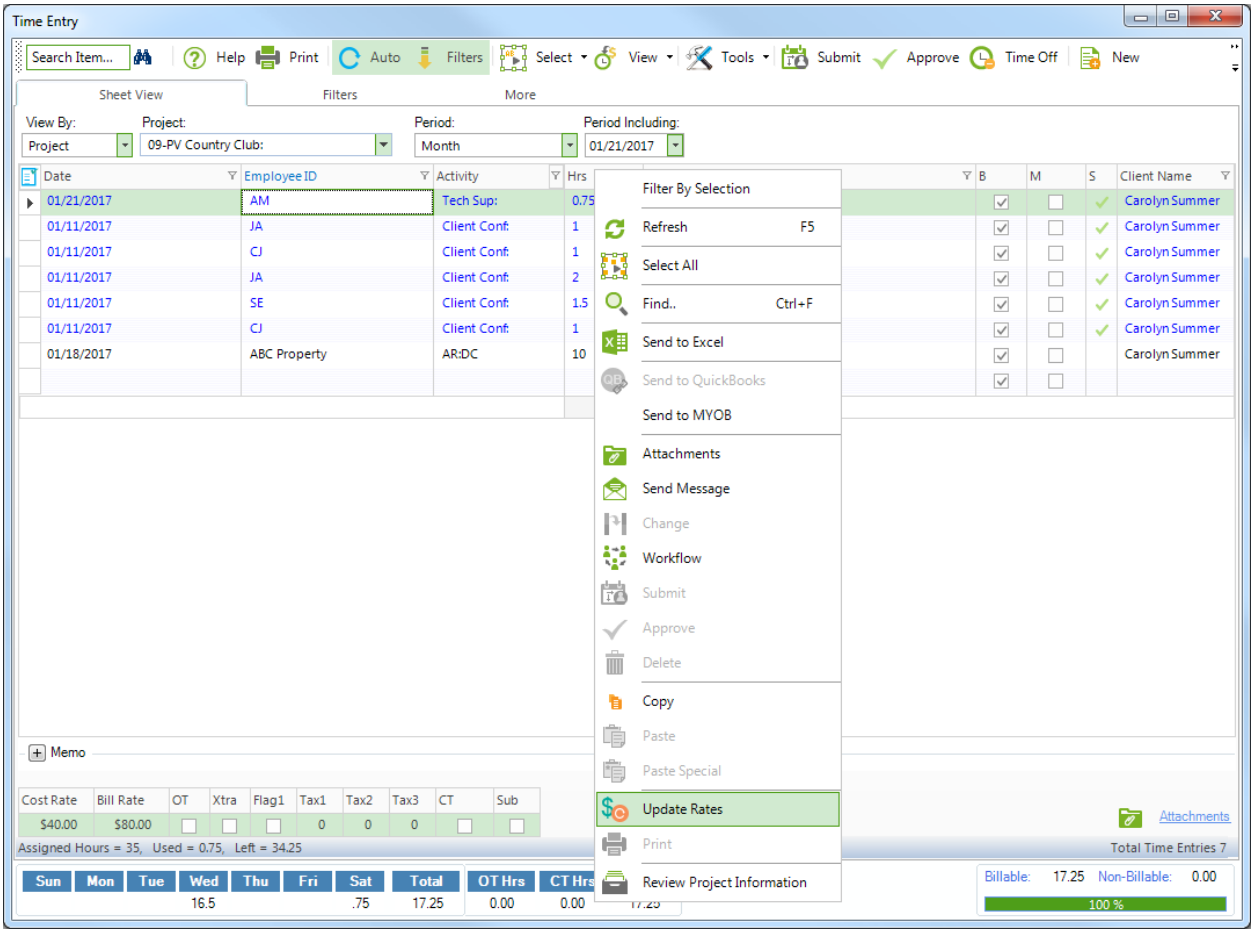
BillQuick gives you the ability to attach files to your invoices. In Invoice Review, select an invoice and right-click to attach new files to it. If you have already attached files in the time entry screen (such as job site photos), expense entry screen (such as expense receipts) and Vendor Bills screen (such as hard copies of bills) for a certain project, you can even view and link those existing attachments to the invoice. When you email the invoice to the client, you may choose to send these attachments along with it. Similarly, upon printing the invoice, you can choose to print the receipts along with it. Now that's a big time saver!

Automatic Billing



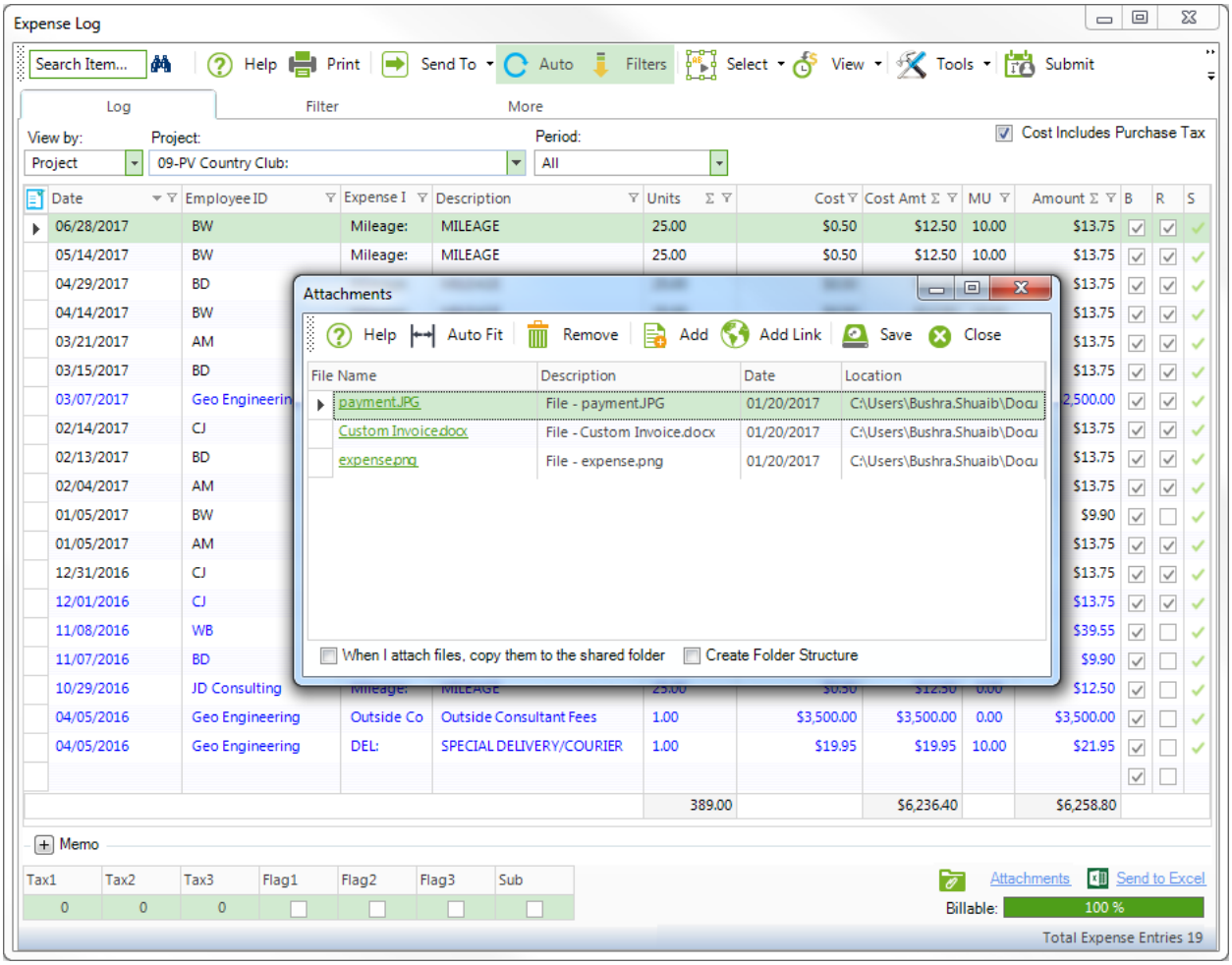
For hourly or fixed fee billing, instead of running billing reports and checking Billing Review every now and then, you can use the auto-billing feature. In the Project screen, set an automatic billing schedule. Choose when to bill and whom to notify about it. You have the option to just set the schedule for automatic processing and forget about it. Else, have it prompt you to process the automatically generated invoice. All you have to do is check the B (Bill) box and hit the Process button. Now that's a hassle-free billing in no time!

Rates



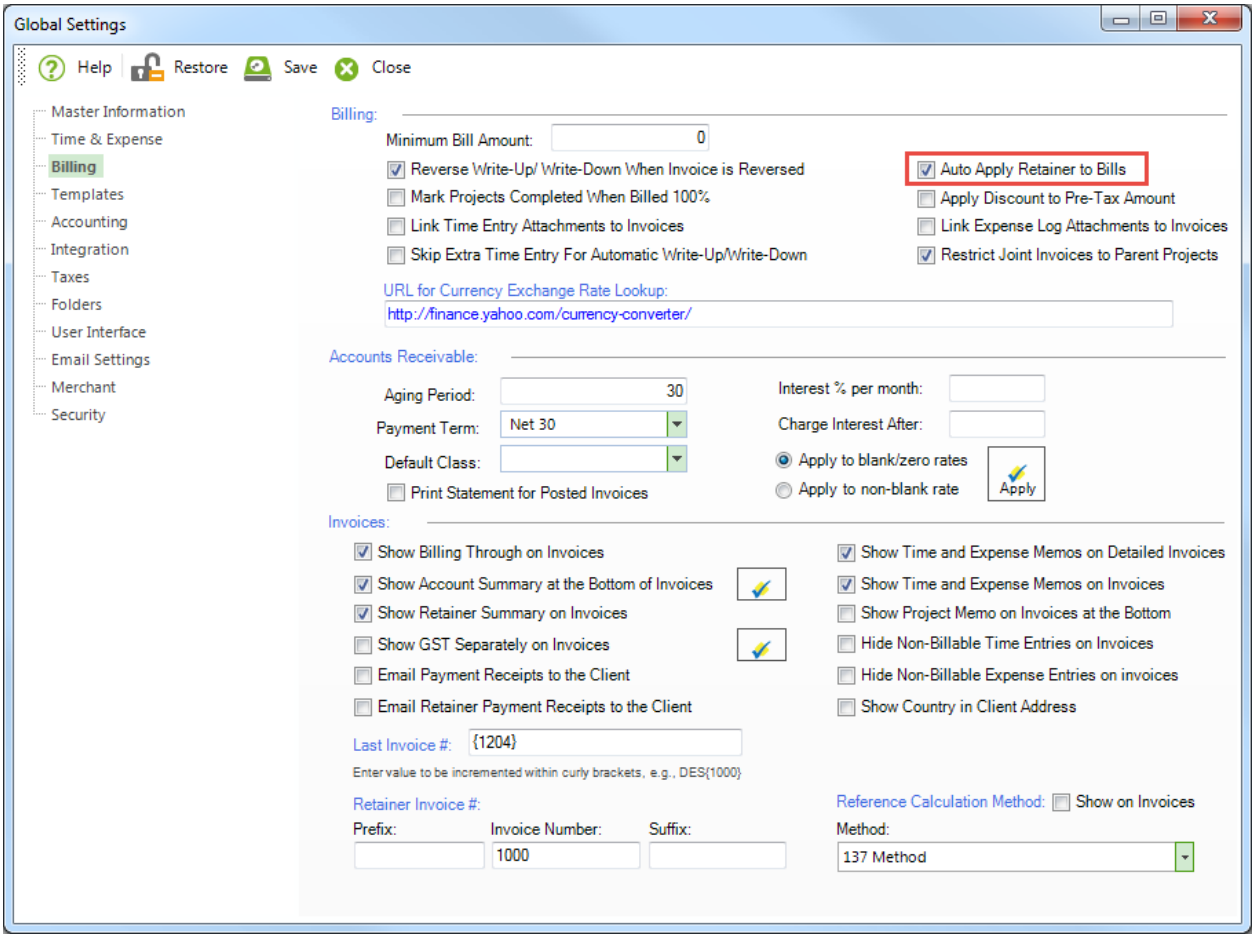
Updating rates just got easier. You can use the shortcut menu to update bill and cost rates for selected time entries in Sheet View or Reviewer. BillQuick uses the current service fee schedule values to update these rates. However, if there is no fee schedule assigned to the project, then it uses the rates from the Activity screen (provided that rule is checked in the Project screen) or Employee screen.

Attachments



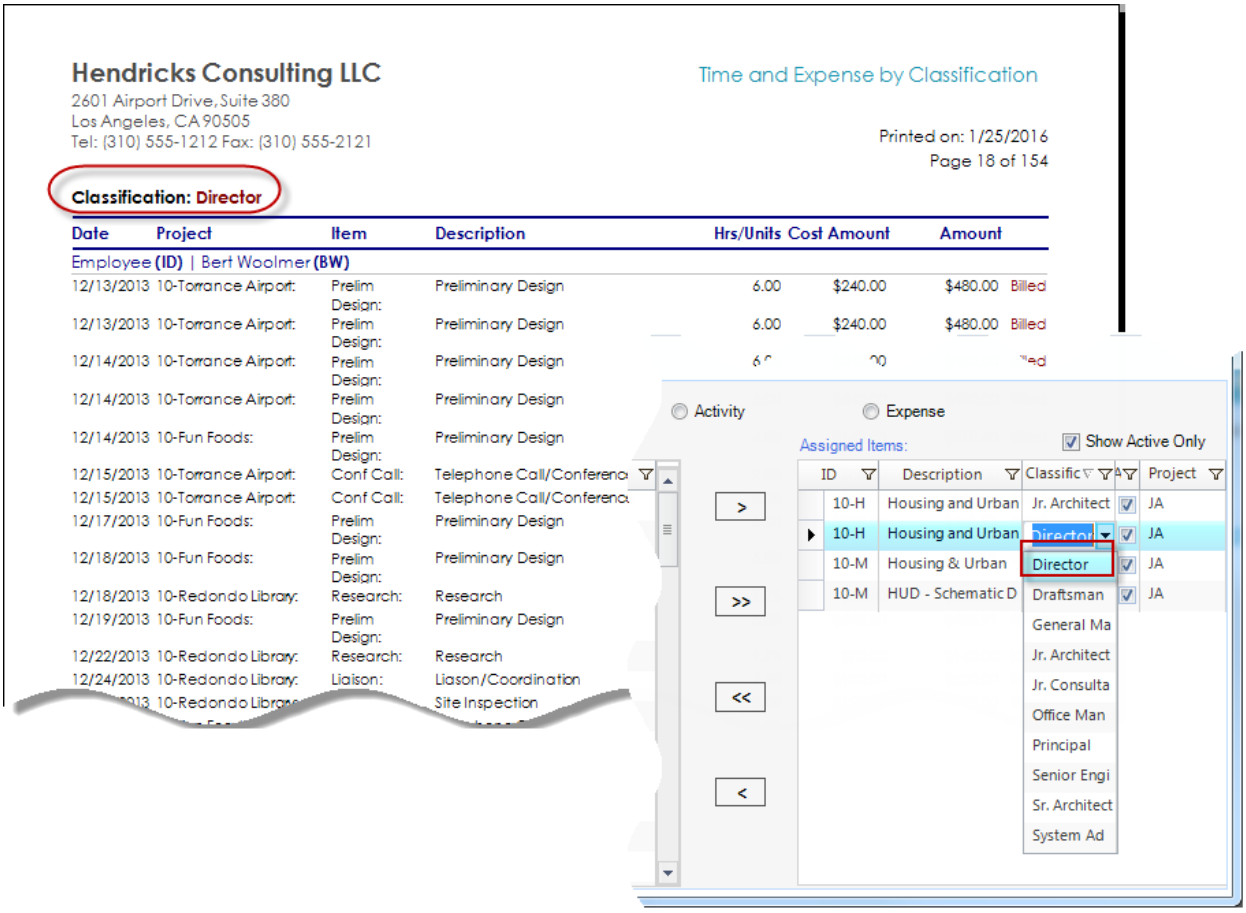
You can link various files and web references to master information records in BillQuick. This way you don't have to look for supporting documents or files in different places, thus saving you time. For example, you may attach receipts to your expense entries in order to get reimbursed for it. Just take a photo of your official lunch receipt and attach it to your expense entry using the Attachments option in Expense Log. You can also see which records have files linked to them from the F (Attachment) column in the grid. Similarly, you may attach site photos to your time entry for inspection or contract documents, drawings and agreements to project records. You can also attach web links of videos and remote files. To bring it all together, BillQuick allows you to view all the attachments in the Manage Attachments screen.

Auto Apply Retainers



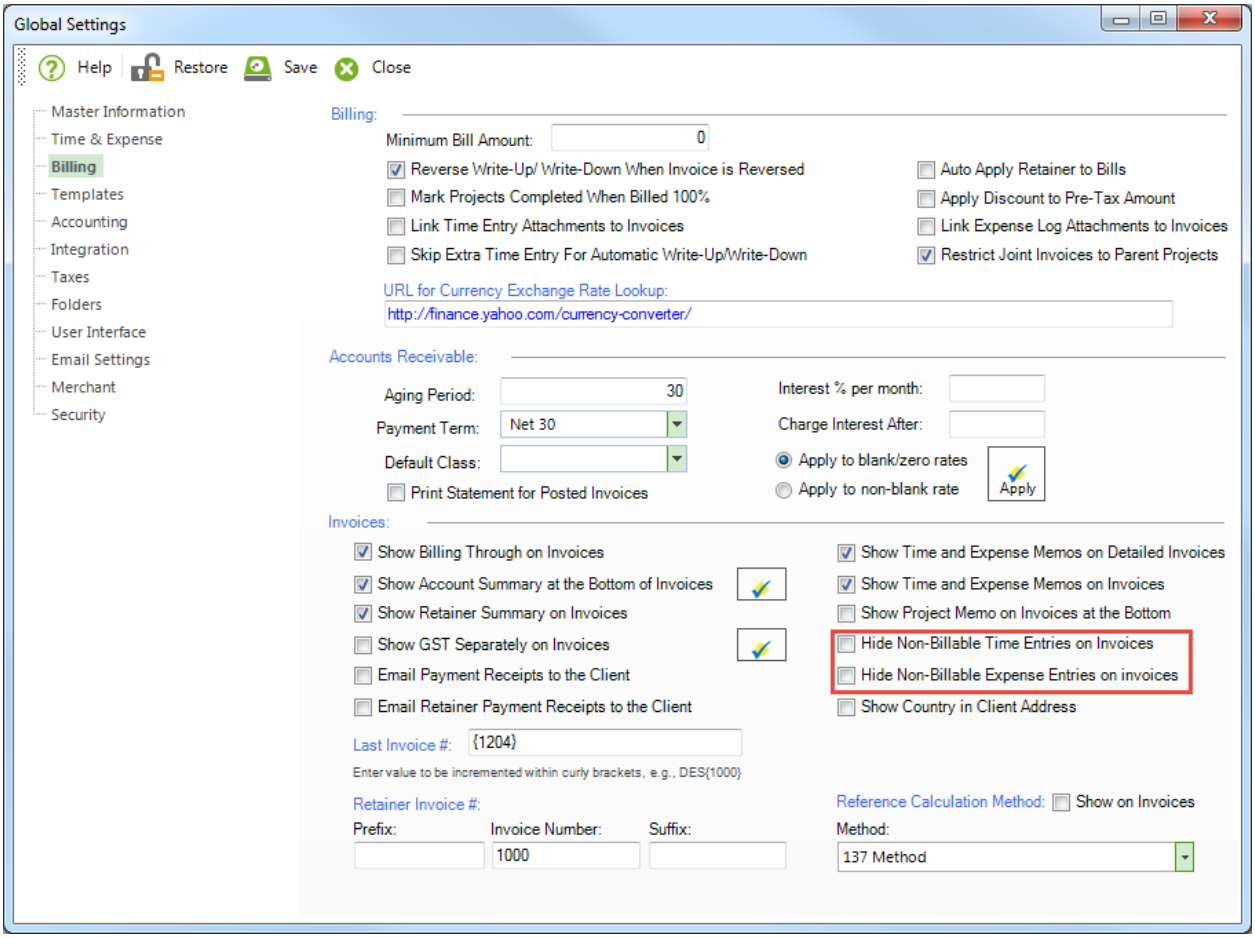
Often people forget that the client has given them a retainer. This usually happens while you are billing your client and the Retainer column in Billing Review is hidden by default. To prevent that, click the Options button in Billing Review and select the Auto Apply Retainer option. Upon refreshing the screen, you will see that BillQuick applies the available retainer to the invoice. You can also specify this in the Global Settings screen.

Employee Classifications



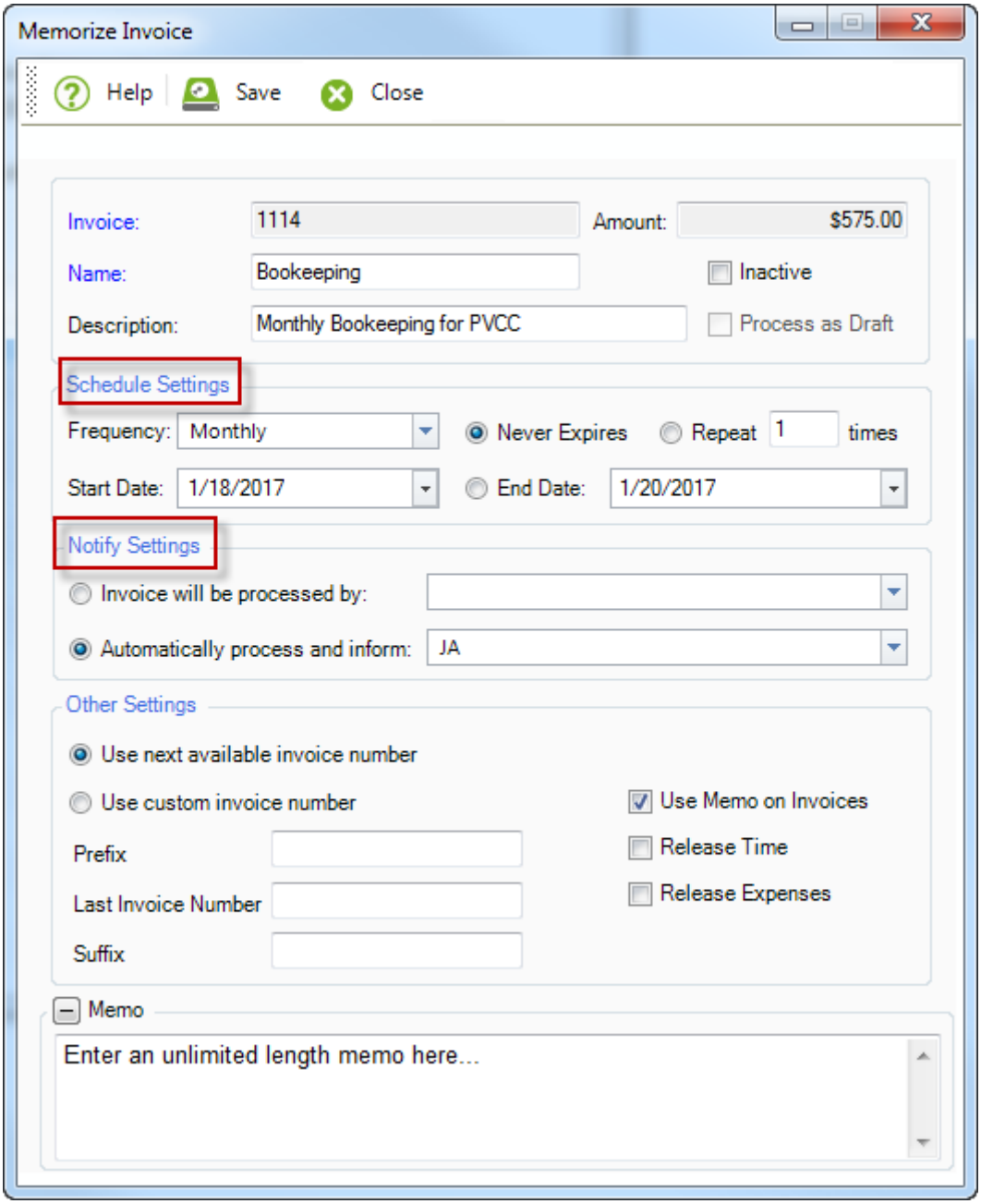
Does your company have several titles for an employee and want to set different rates for different job titles? BillQuick handles this in a manner that justifies variable billing rates for an employee working under different titles. For example, an employee may have title of Research Analyst for one project and a Senior Consultant for another. By specifying a classification, you can assign different rates to an employee in the service fee schedule. After negotiating with clients, managers can decide which rate to charge for the work done. You can also view various employee reports by classification.

Non-Billable Time



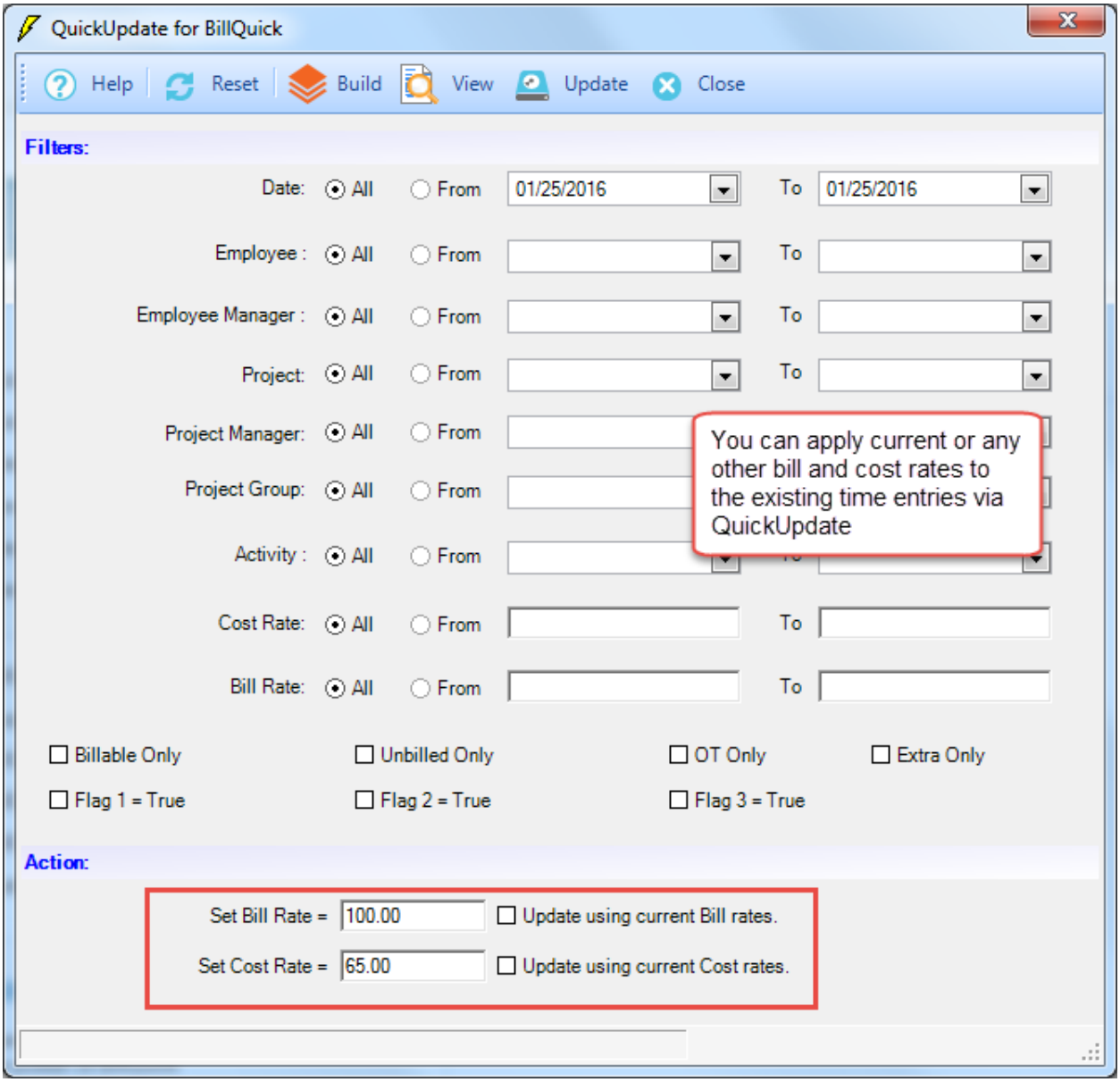
BillQuick gives you the flexibility of deciding whether to show or hide non-billable time and expenses on invoices. By default, it includes time and expense entries with $0 amounts on detailed invoices as 'No Charge' items. It is a good idea to show this amount on the invoice as the client knows that you offered some valuable service to him but are not charging for it.

Memorized Invoices



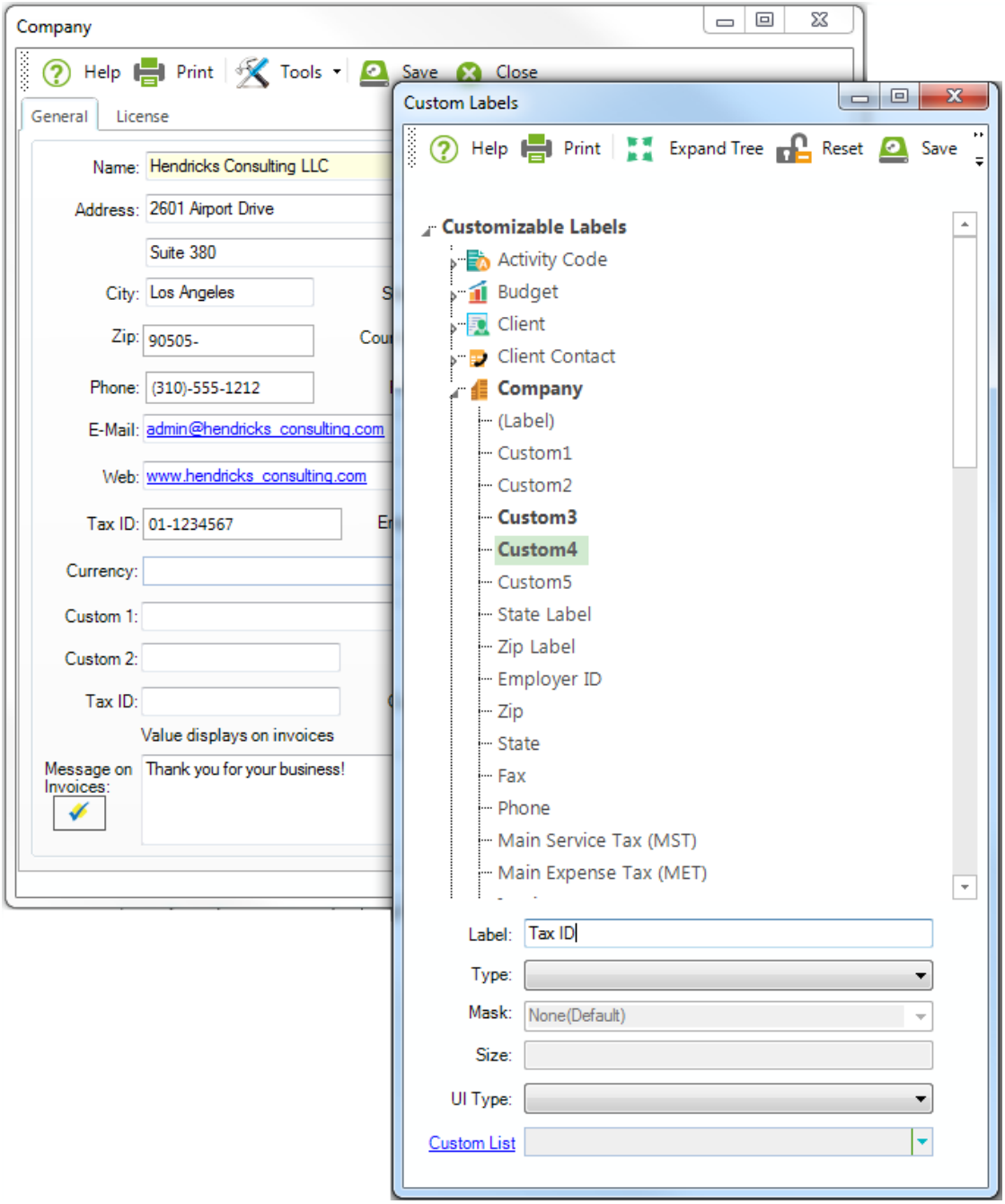
You may be generating invoices in the Manual Invoice or Billing Review screen according to your billing cycle. However, you can avoid this manual billing routine by right clicking an invoice in Invoice Review and memorizing it for future. The Memorize Invoice screen enables you to specify the billing frequency and notification settings for it. All you have to do is process it on being prompted or better still, have it processed automatically. The idea is to let BillQuick take over the entire billing for you.

Quick Update Rates



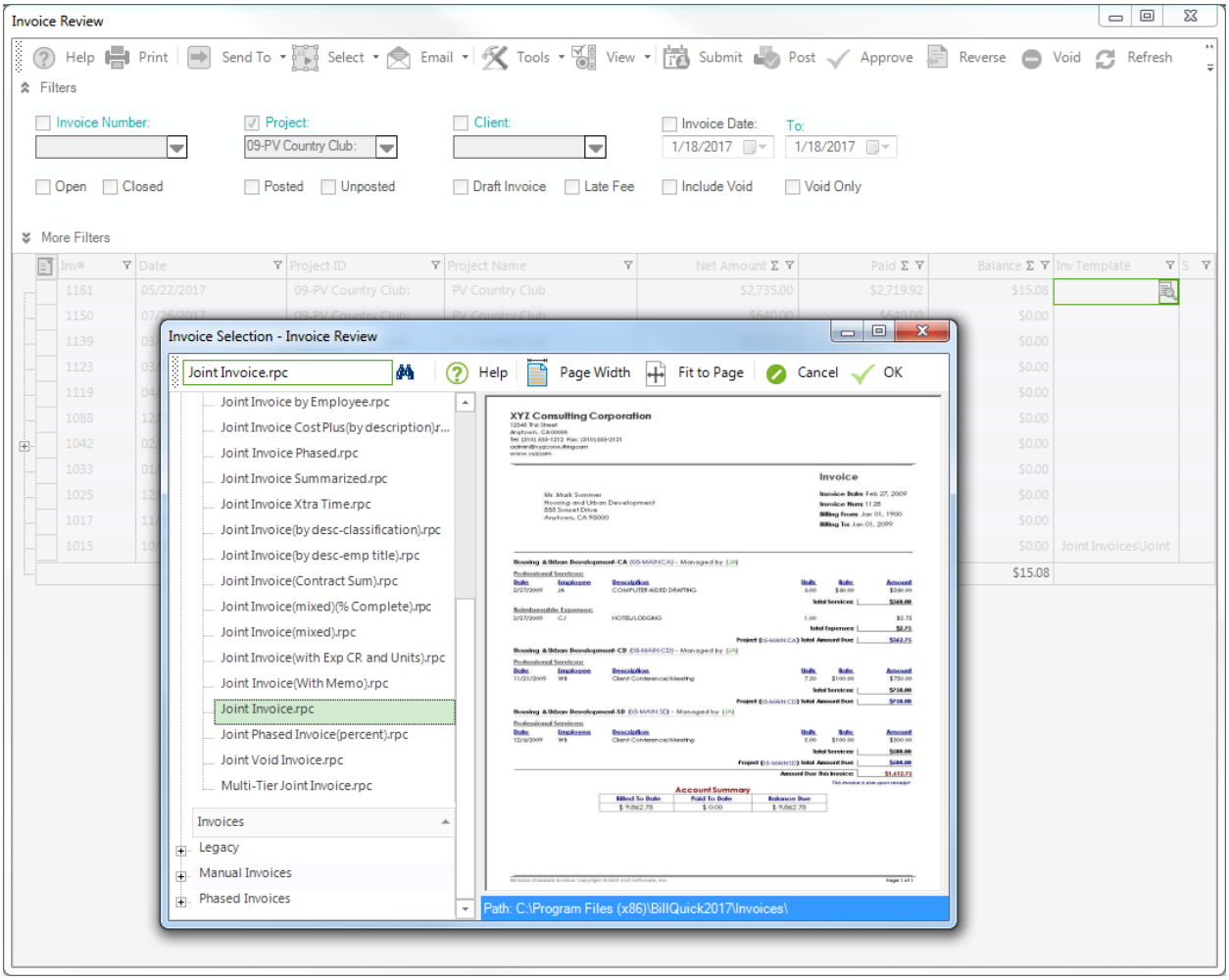
If you want to apply new bill and cost rates to multiple time entries (or unpaid vendor bills) at once, use the QuickUpdate tool in BillQuick (Utilities menu). This option is useful when you forget to update your fee schedules or rates on the Employee screen, and want to correct the rates for your existing time entries. In doing so, you can use filters to narrow the set of time entries to be updated.

Tax ID on Invoices



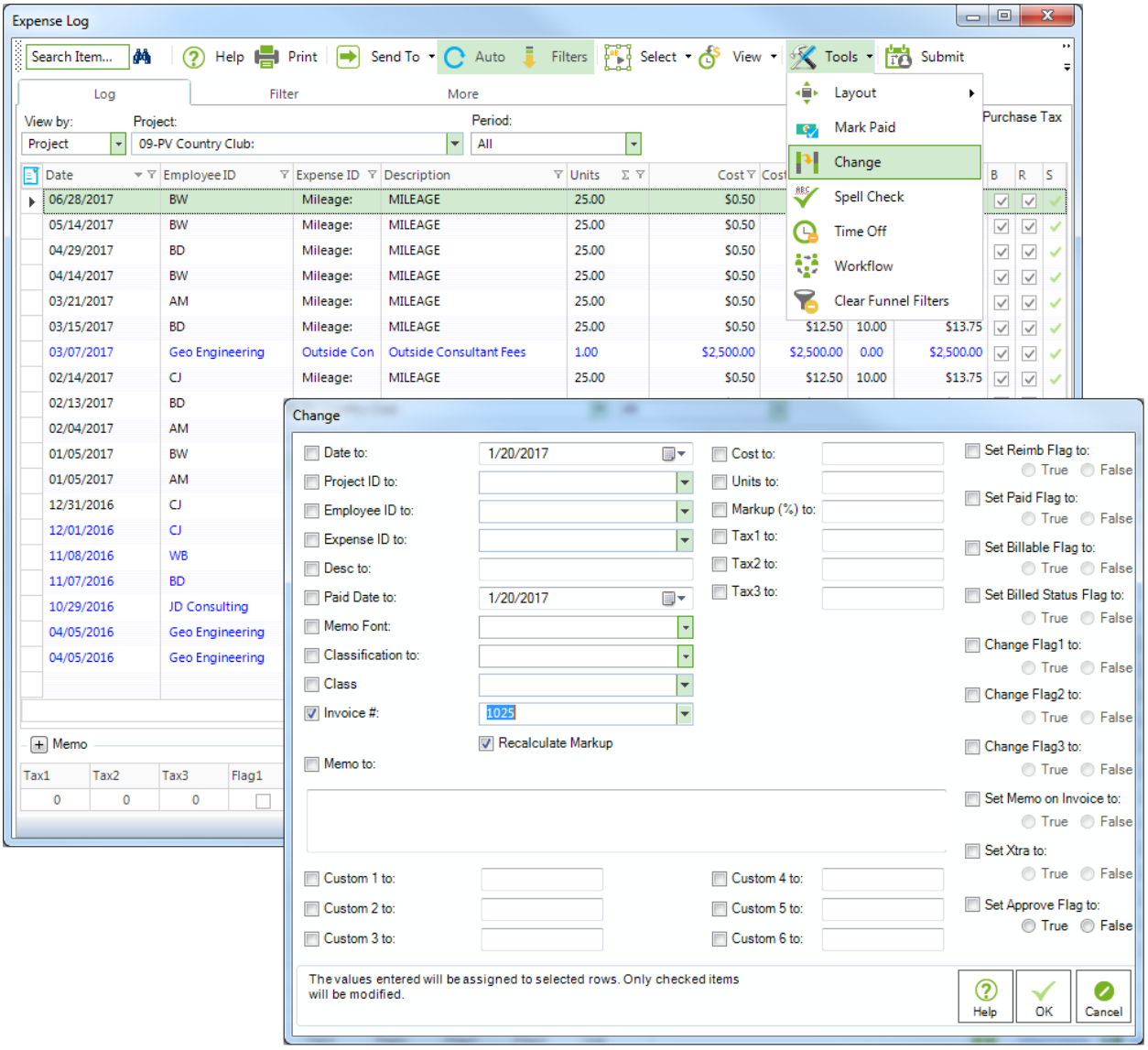
Do you want to display a specific value on your invoices but haven't seen that field in any BillQuick screen? Well…look again! You can choose to display a specific value like your company's Tax ID on the invoices. Just change the caption and data type for the Custom 4 field under Company in the Custom Labels screen. You will see the new field on the Company screen and the value displayed on your invoices.

Invoice Templates



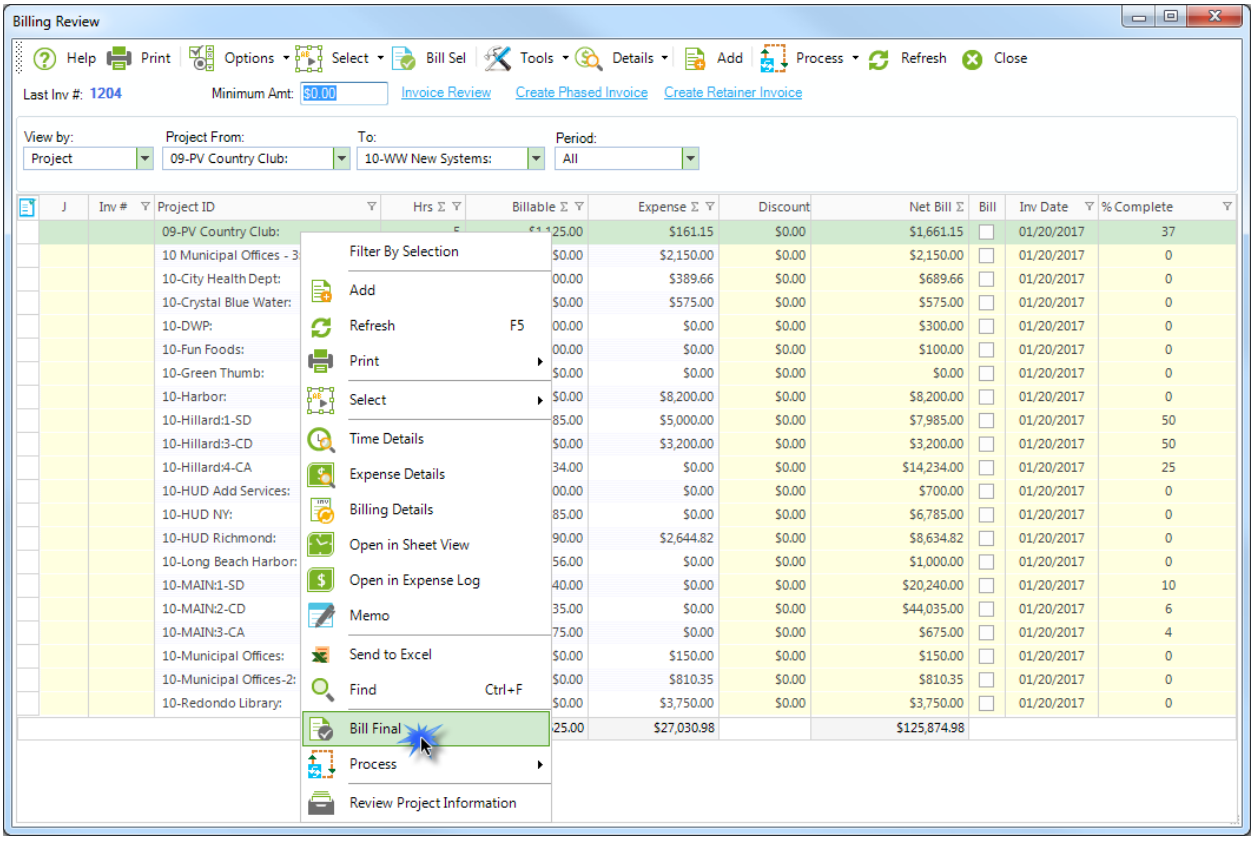
Invoice Review allows you to change the default invoice template on the fly while generating or reviewing an invoice. You may want to do that if a client calls and asks for the invoice to be re-issued in another format. Or if the client asks for the same invoice but with less or more detail. All you have to do is click on the invoice icon to open the Invoice Selection screen and choose another template. However, this applies to the active session only but you can make the change permanent.

Progress Billing for Expenses



Often you are ready to bill but may not have entered all the time and expenses yet. Typically, you may want to send invoices to your clients and associate the time and expense entries to them later. While BillQuick already allowed you to progress bill time entries, it now allows you to bill your expenses and link (or reconcile) them with the invoice later. Just select the relevant expense entries and click Tools to open the Change screen in Expense Log. You can pick the invoice number from the drop-down and choose to recalculate the markup on the expenses. With this, your job cost and profitability information are updated. Moreover, if you need to reprint the invoice, the items you added will be there.

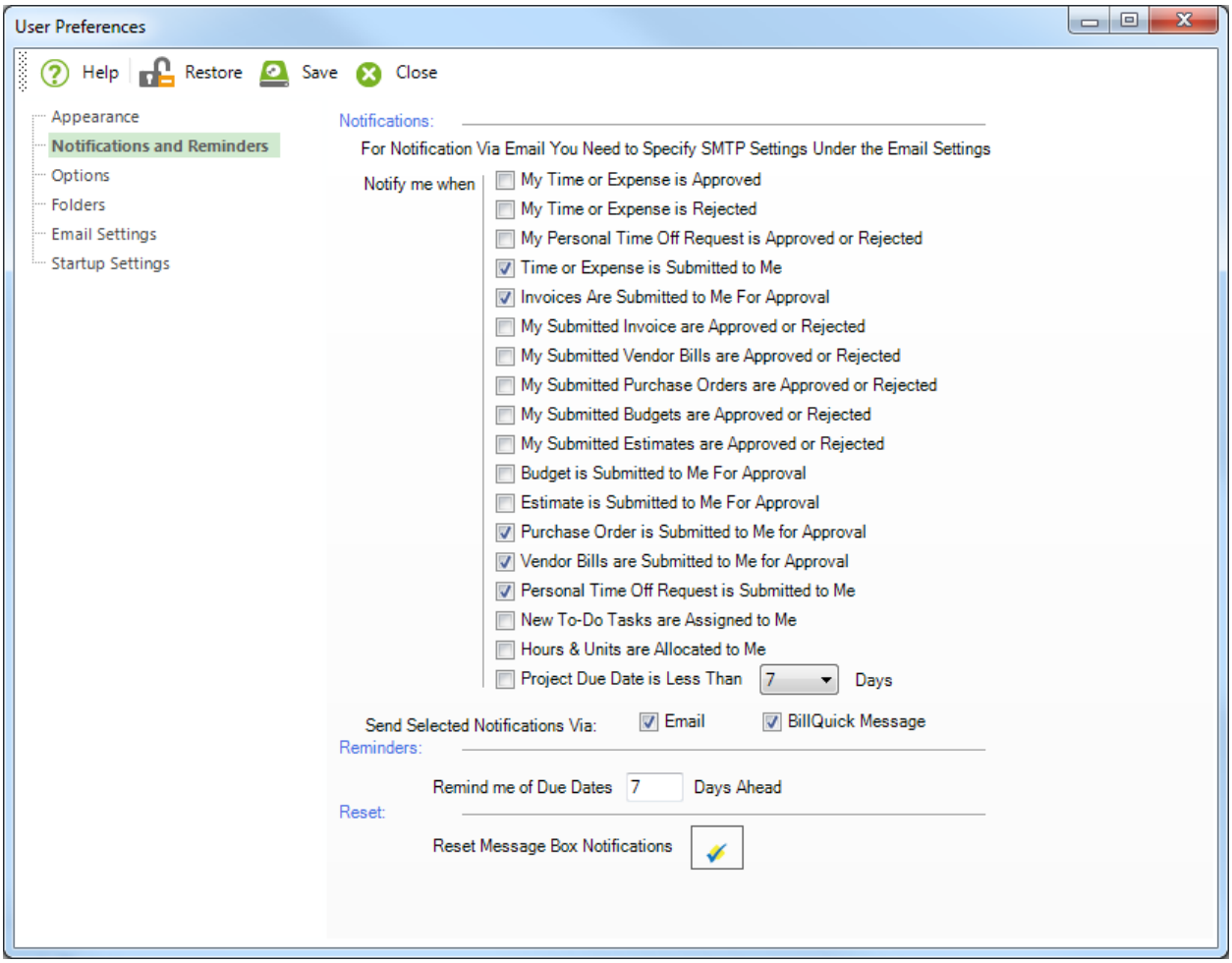
Bill Final



You may be billing your clients a fixed or variable portion of the total contract amount over a number of months. In such cases of fixed or progressive billing, you can use the Bill Final feature in Billing Review at the end. Just right-click on the billing record and select Bill Final from the shortcut menu to auto calculate the last Net Bill amount.

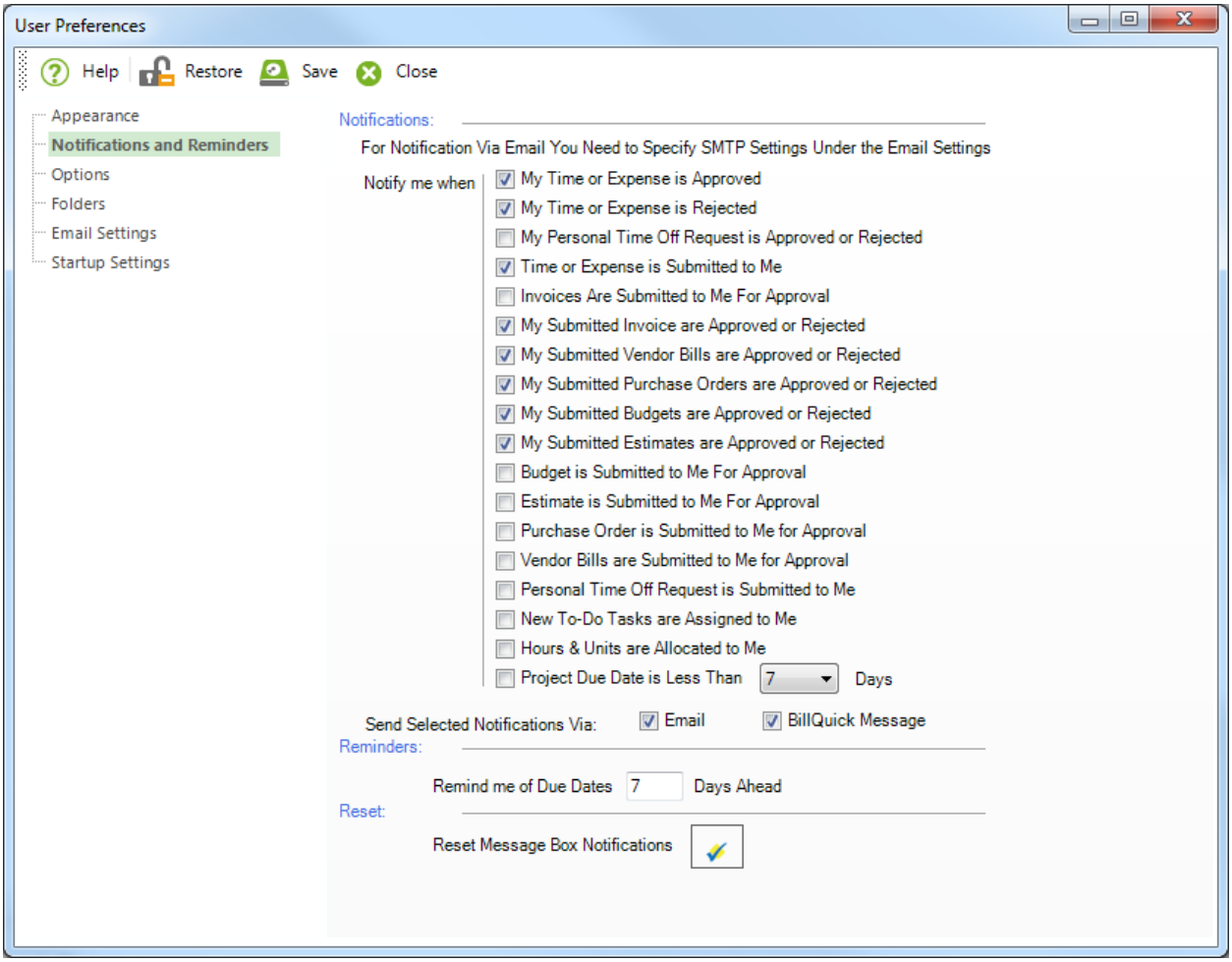
AUTOMATION TIPS

Email Notifications



If you are a busy professional responsible for reviewing or approving time and expenses of other employees, set an email reminder in the User Preferences screen. Instead of checking BillQuick every now and then for submitted time and expense entries, have it notify you via email whenever someone submits time or expenses to you. You can set these notifications for submitted invoices and PTO requests as well.

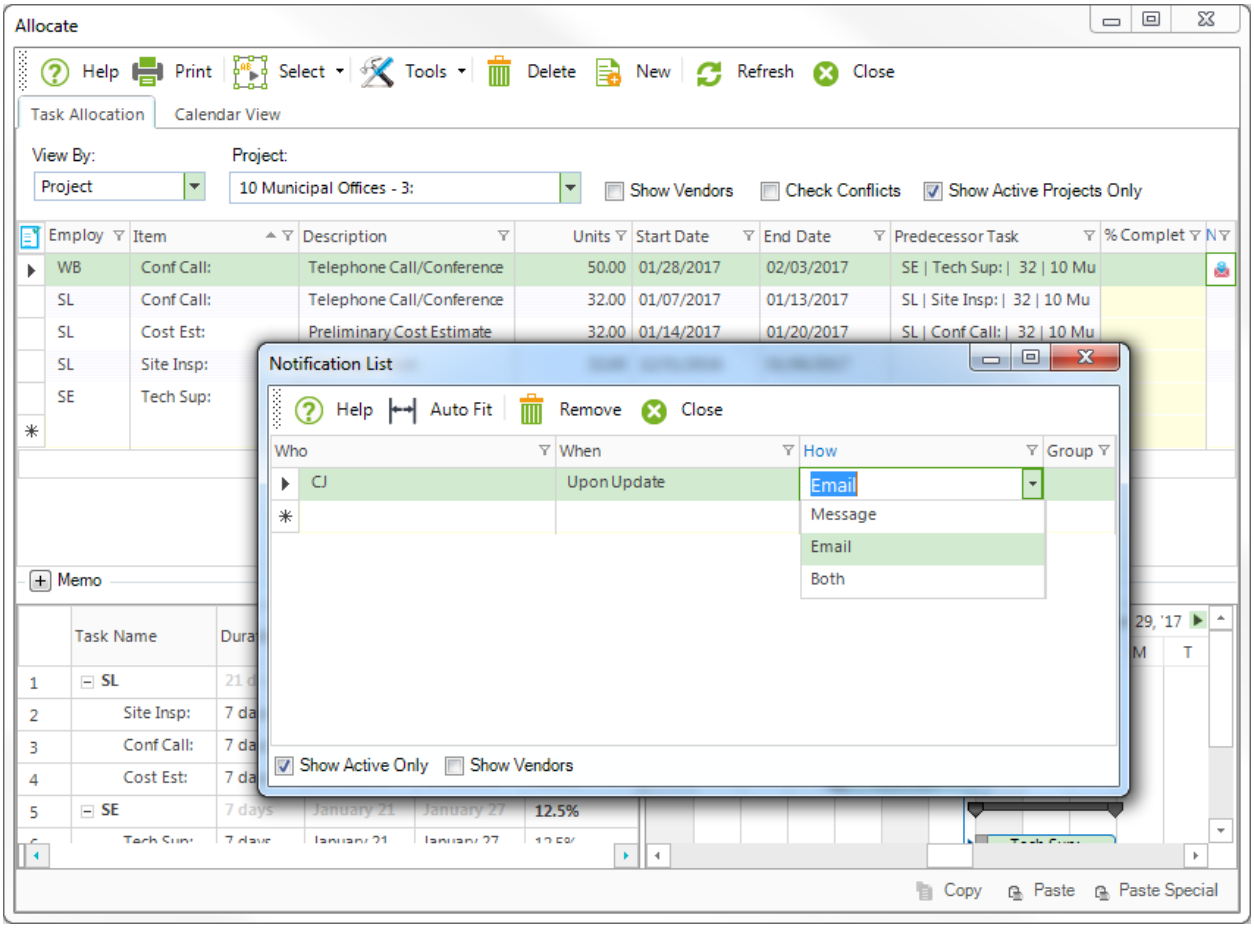
Reverse Notifications



This is a huge time saver. Whenever you submit anything to your manager for approval, say time entries, expenses, invoices, vendor bills, and so on, you keep on checking BillQuick over and over again to see if they have been approved or not.

BillQuick has a very efficient system to notify you about all those submissions. All you need to do is set the notifications on User Preferences that start with 'My. . .' and let it do the rest. So whenever your entries and invoices are approved or rejected, you will be notified by email or BillQuick message, as you prefer. The best part is that you do not have to leave your computer on to receive the email notifications.

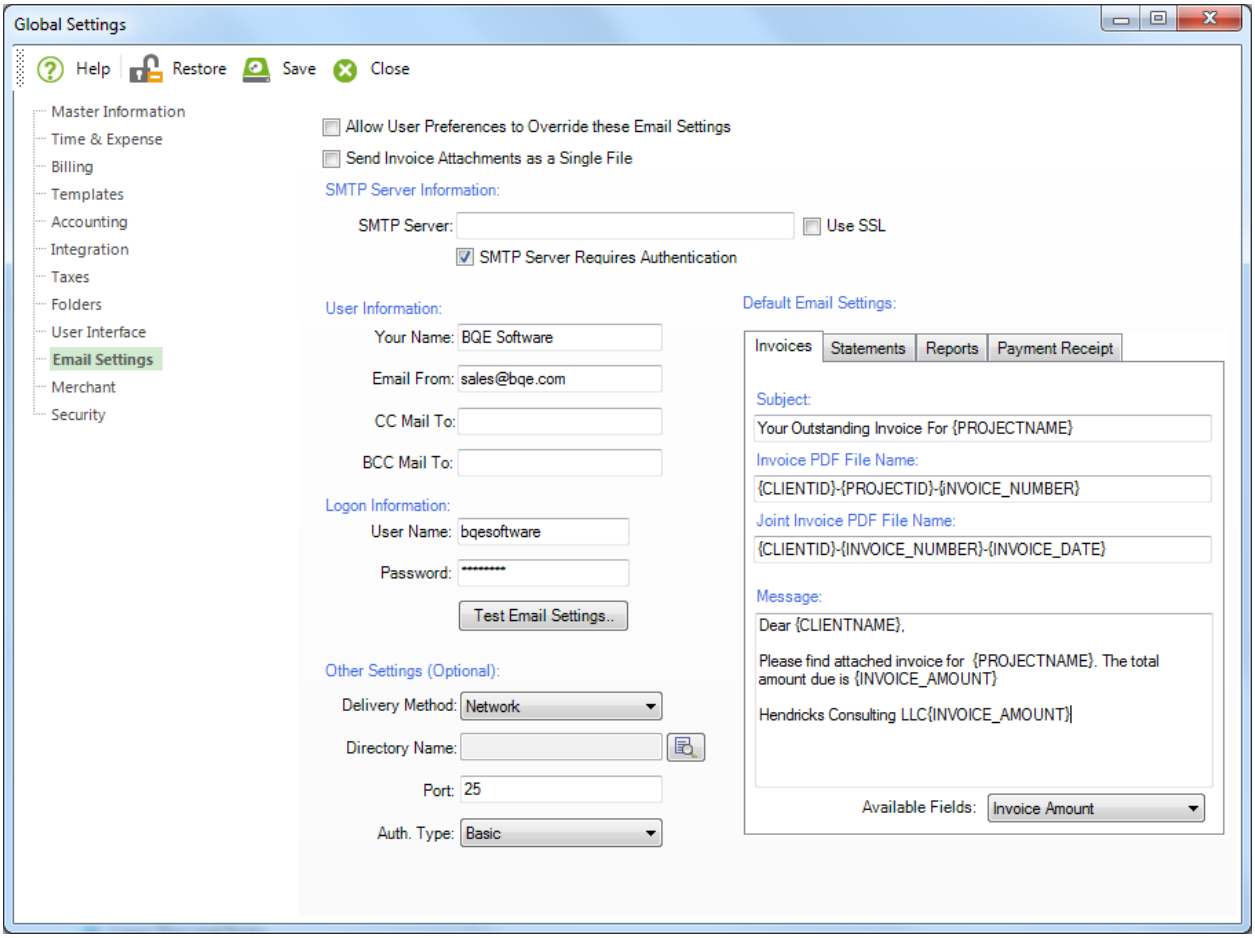
Task Notifications



At times, your tasks are dependent on other people's tasks. Unless they complete their tasks and inform you about it, you keep on checking with them to know the status. Instead of waiting for others to remember to notify you, BillQuick enables you to subscribe to these notifications via email or BillQuick messages.

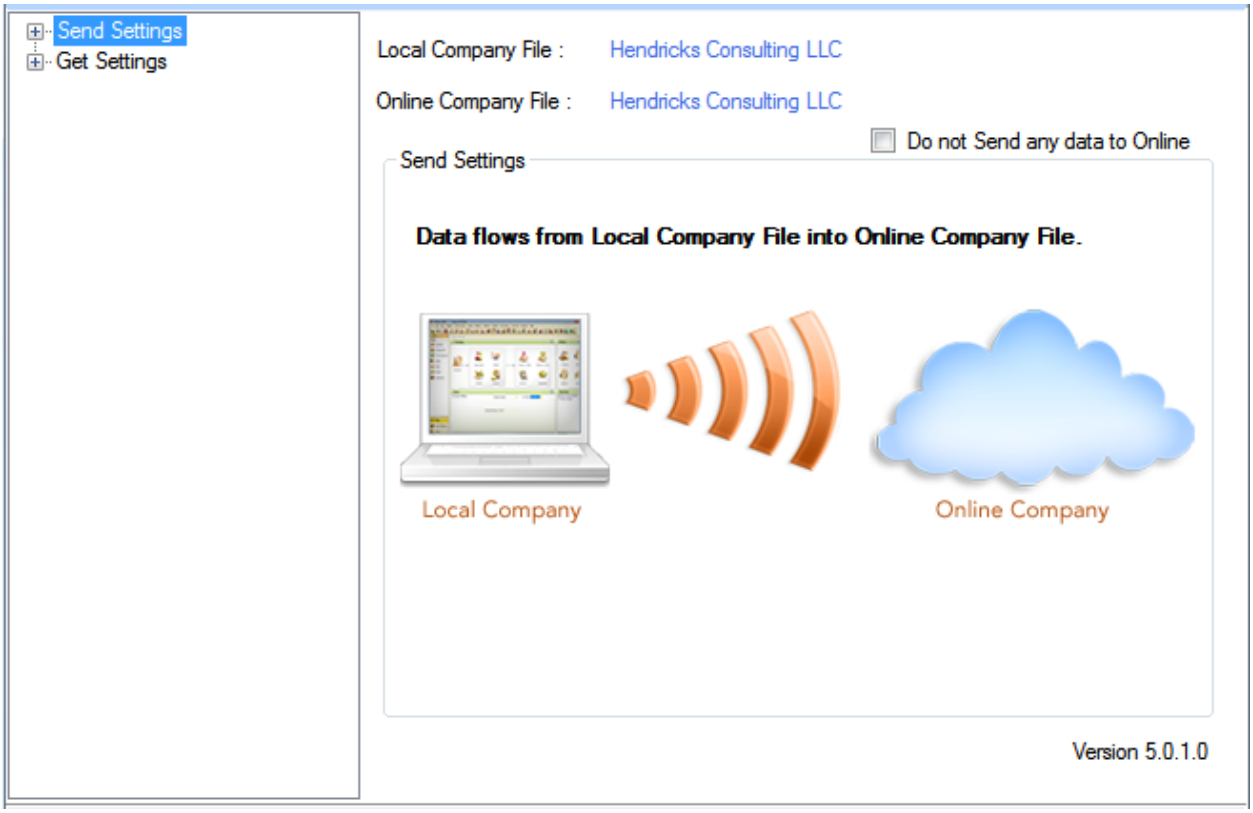
To kill the delay involved in dependent tasks, turn on the Notifications column in the Allocate–Task Allocation screen and set up notifications for the predecessor tasks. You can see the task dependencies on the grid as well as the Gantt chart. When they are completed, you get informed to start your task. You can also add other people to be notified on related tasks.

SMTP Settings



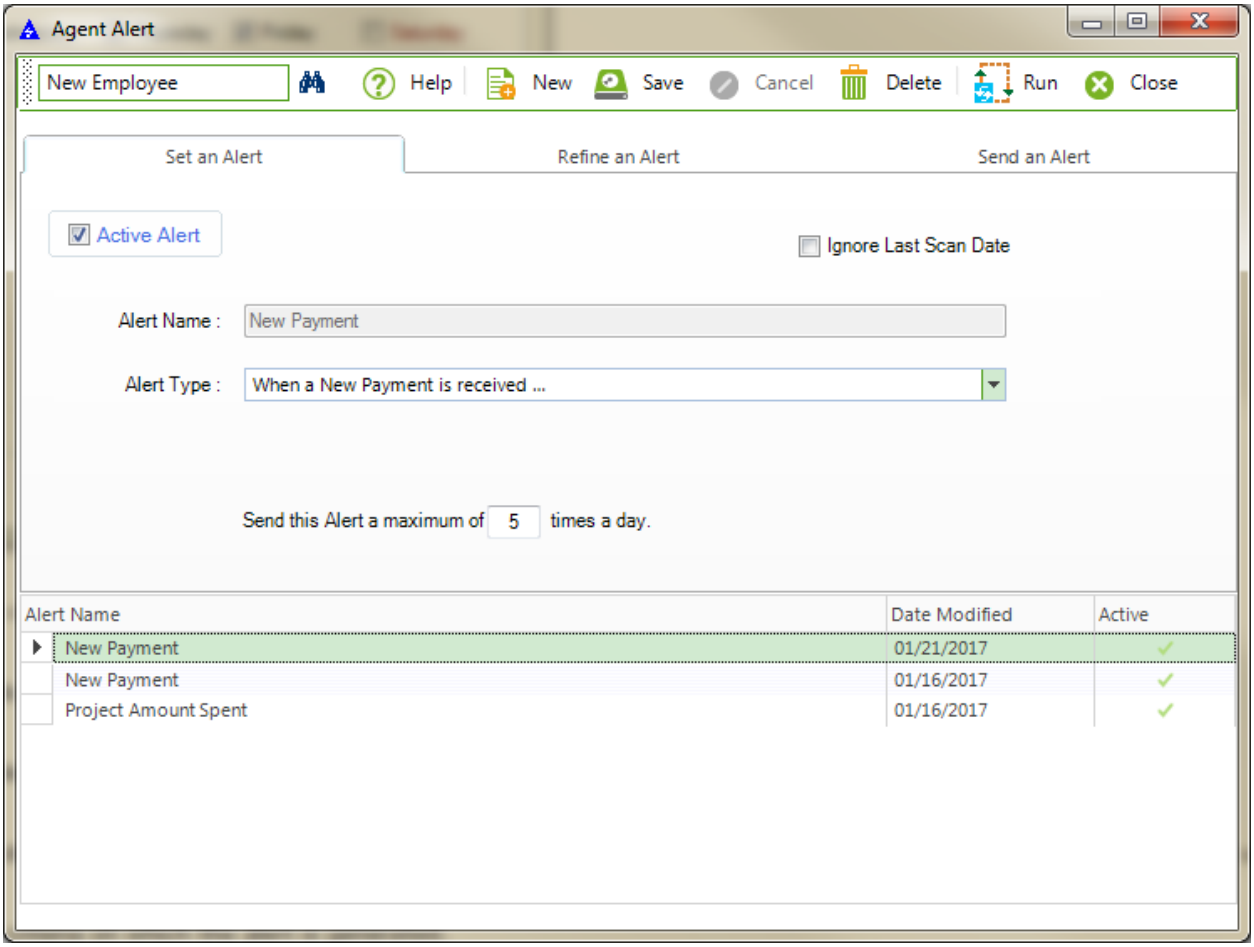
BillQuick allows you to email invoices, reports, bills, and so on to your managers, employees, customers or any other person. If you specify the MAPI settings in User Preferences, you will be prompted each time to allow access to your email account, say Microsoft Outlook. That's why we recommend specifying SMTP settings instead at the global level. This allows BillQuick to send your emails directly to the customer independent of your email client, resulting in faster delivery of emails.

BillQuick Online-Desktop Sync



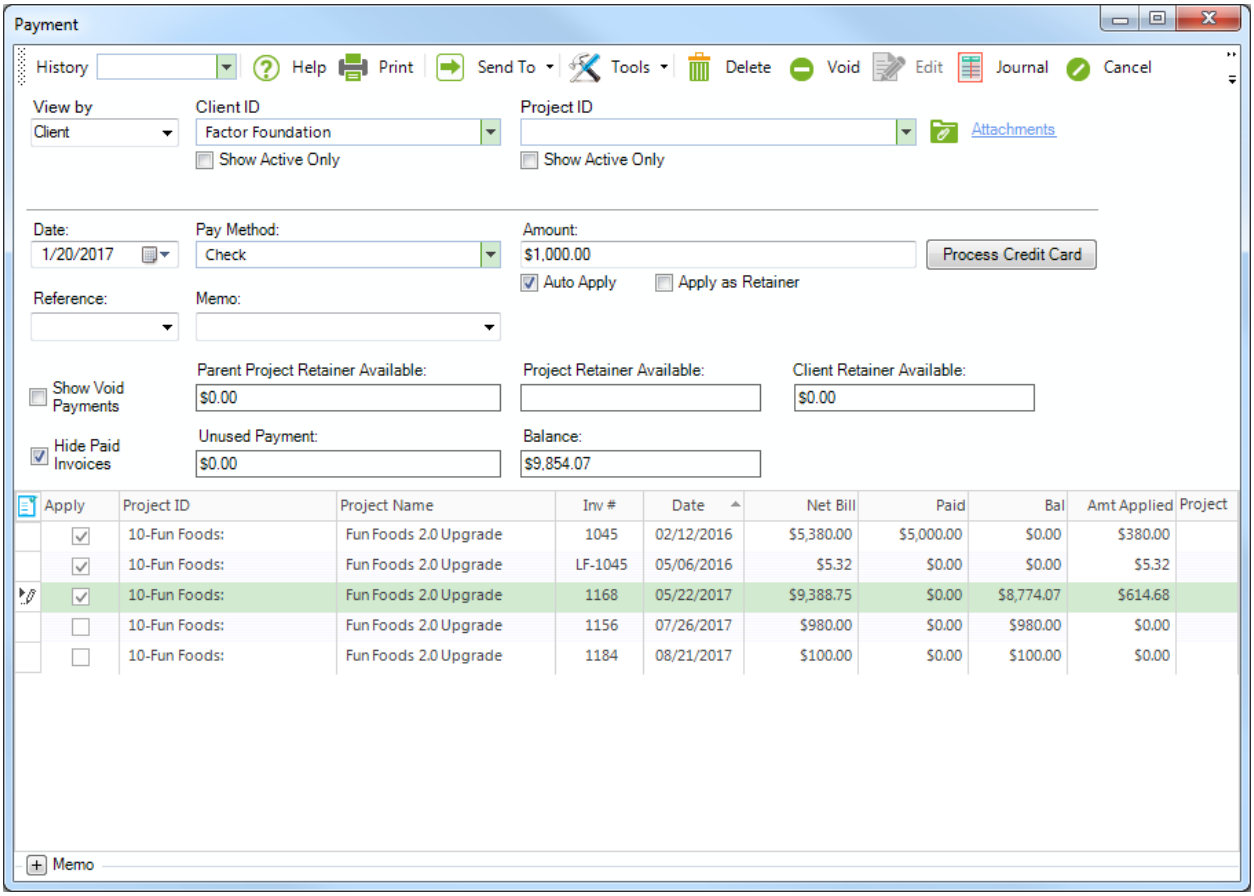
You can subscribe to BillQuick Online and reduce your cost of ownership with no software installations and backups. This can be a good choice especially for your timekeepers. They can enter time and expenses from any remote location using their laptops or smartphones. You could be managing the entire company from your desktop BillQuick. The best part is that using the synchronization tool, you can sync your BillQuick desktop data with the data on the cloud.

Alerts



BillQuick Agent automates your administrative and management workflow, thus saving you time and money. You can set critical business alerts for your company and have Agent trigger them under exceptional situations or special events that require your immediate attention. For example, you may want to get notified about the due date of a project, its completion or when amount spent on it exceeds a certain value. Or you might want to get an alert when a new payment is received from a client. You can choose from more than 40 pre-defined alerts or define your own threshold. You can choose to receive an email or on-screen notification.

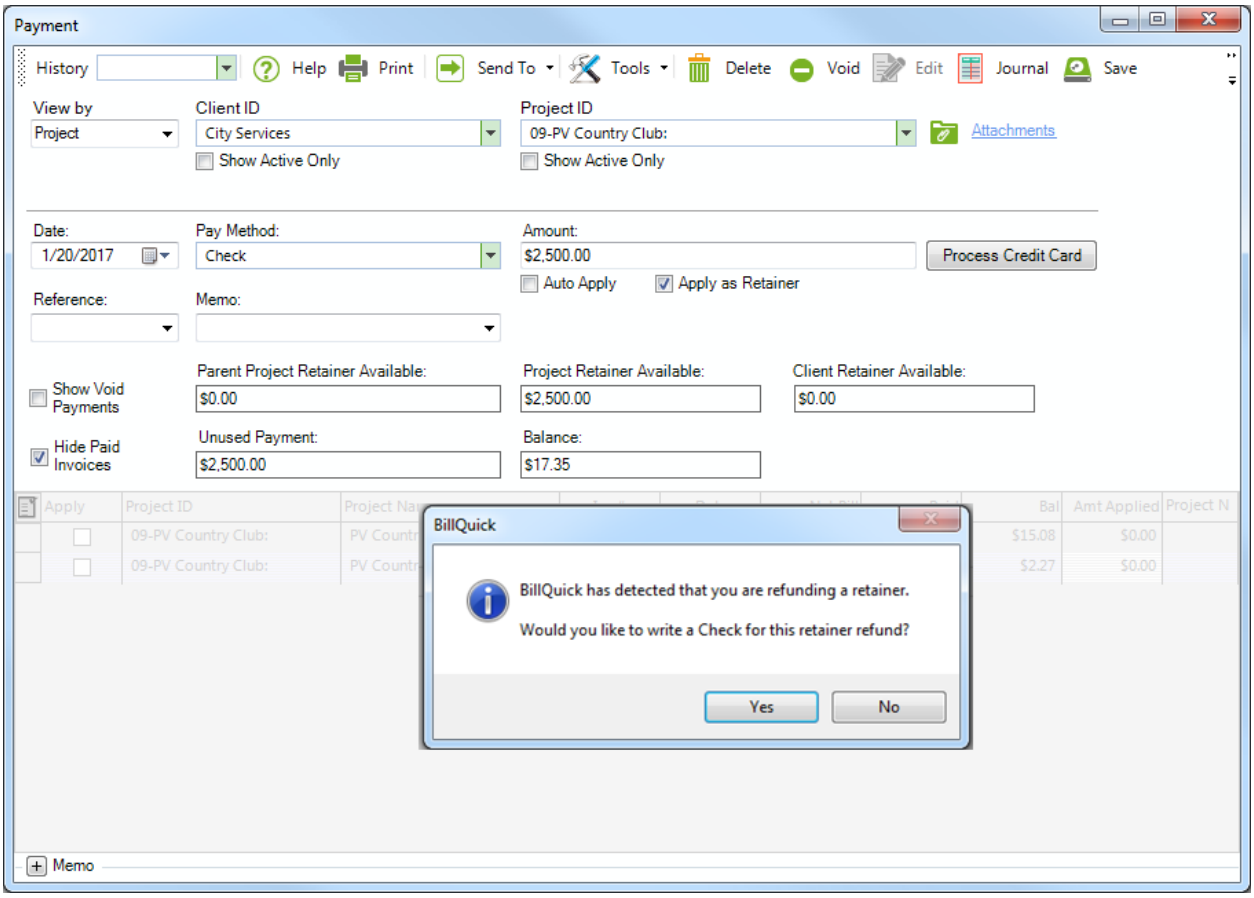
Auto Apply Payments



Recording payments couldn't get any easier than this. In the Payment screen, you can enter the entire payment amount or a portion of it manually in the 'Amt Applied' field on the grid against each invoice. Else, you can use the Auto Apply option to apply the payments automatically to the invoices in the 'oldest to newest' order (by default) or any other sort order you prefer. Click Save.

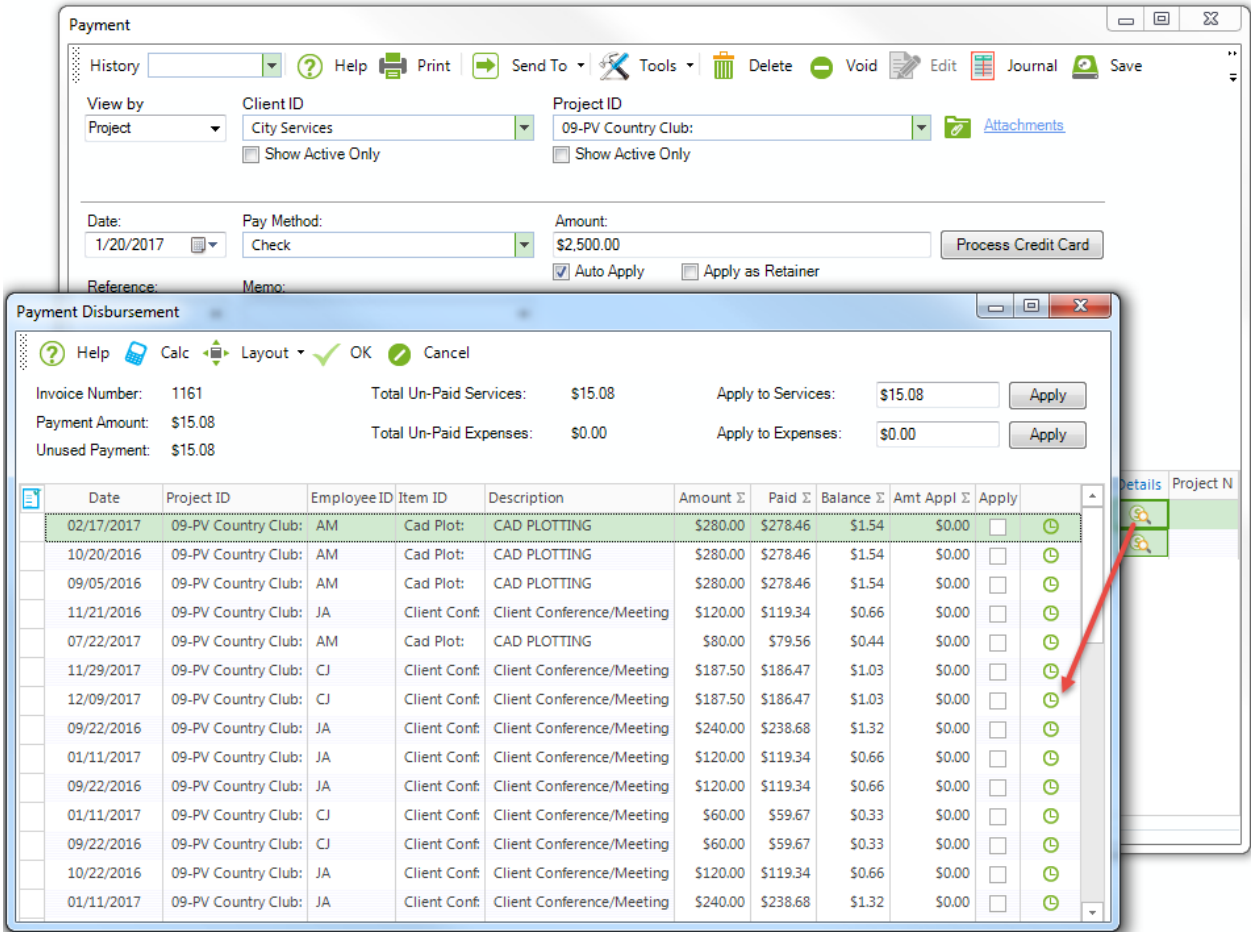
PAYMENT TIPS

Retainer Refund



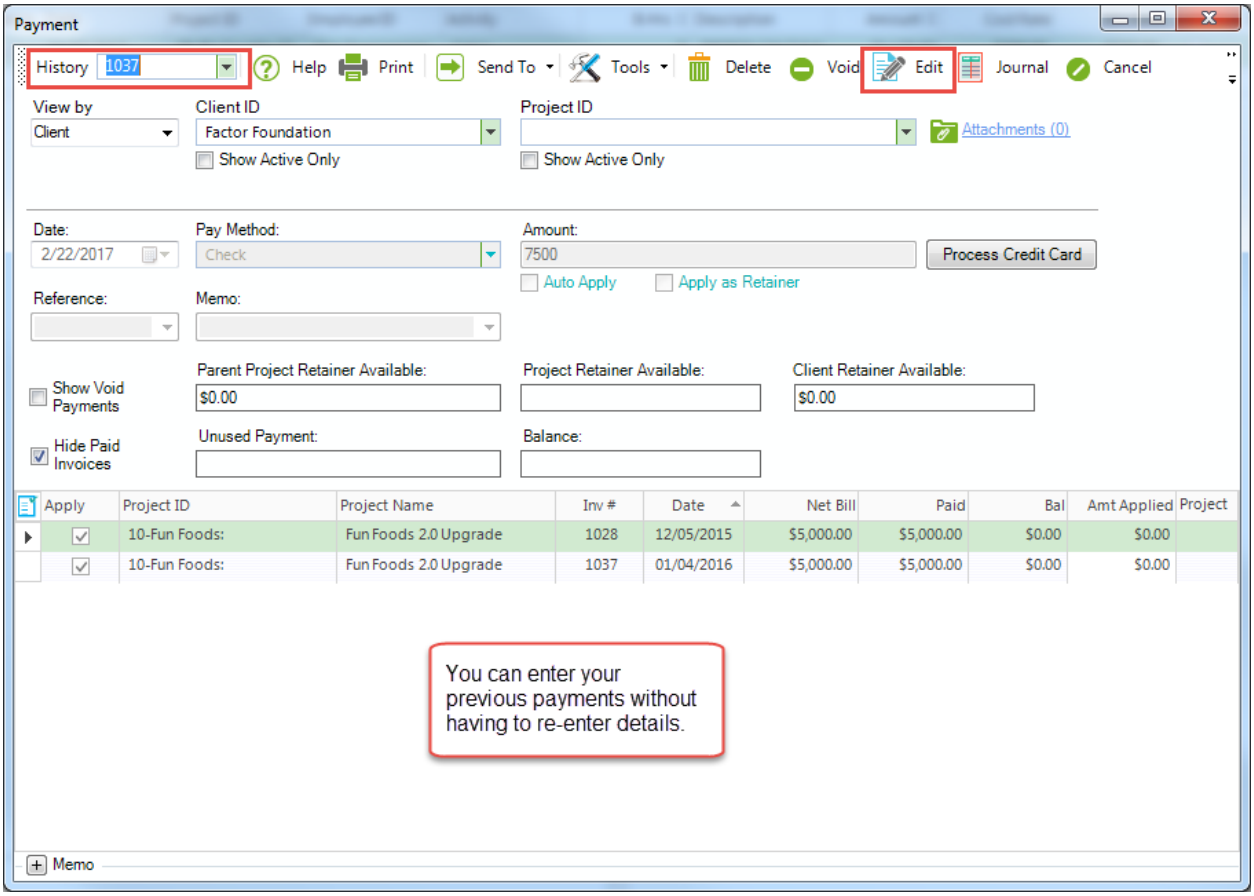
Are you in a fix because you don't know how to handle unused retainers in BillQuick? Your project is complete and there is a retainer balance that you want to refund but not quite sure how to do it. Simple. In the Payment screen, enter a negative retainer amount (say $2500) and apply it as a retainer. It will cancel out the actual retainer available. Your company can now send a check for this unused retainer to the client.

Payment Disbursement



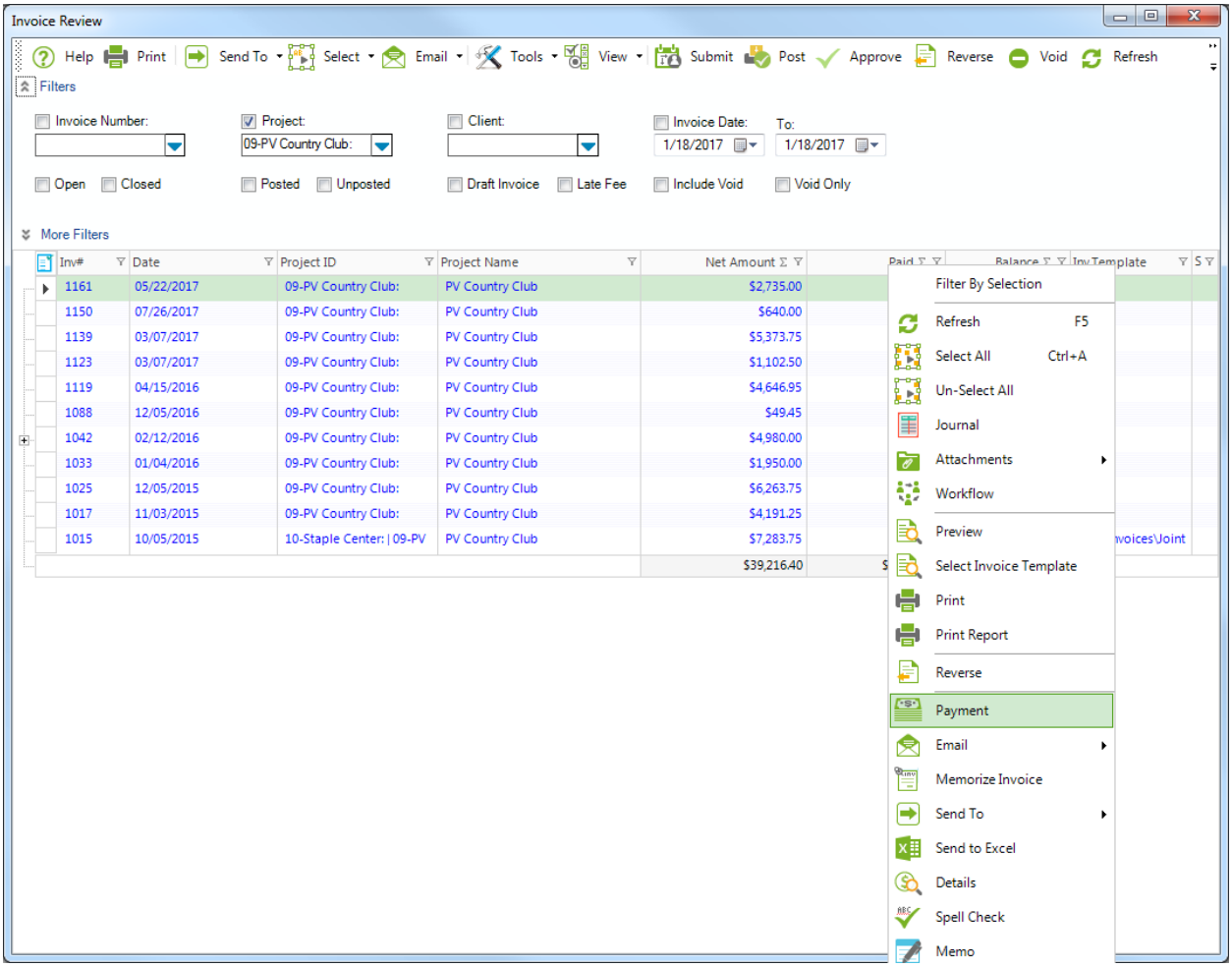
When a client makes a payment, BillQuick equally distributes the payment into all the line items associated with the invoice. However, using the Payment Disbursement feature from the Payment screen, you can now control its disbursement to different service and expense line items. As you are disbursing the payment to the line items, you can see a real-time summary of total payment applied to services and expenses, and total unused payment. This is especially useful if you want to pay off your reimbursable expenses prior to paying off services or sub-consultants.

Payments



You may have recorded a payment and later realized that the pay method or the amount was incorrect. Previously, you had to delete that payment and re-enter all the details with the corrections. The good news is that BillQuick now allows you to edit a previous payment without having to re-enter details by selecting the previous payment from History drop-down and clicking the Edit button on the Payment screen. The only exception is a payment that has already been deposited.

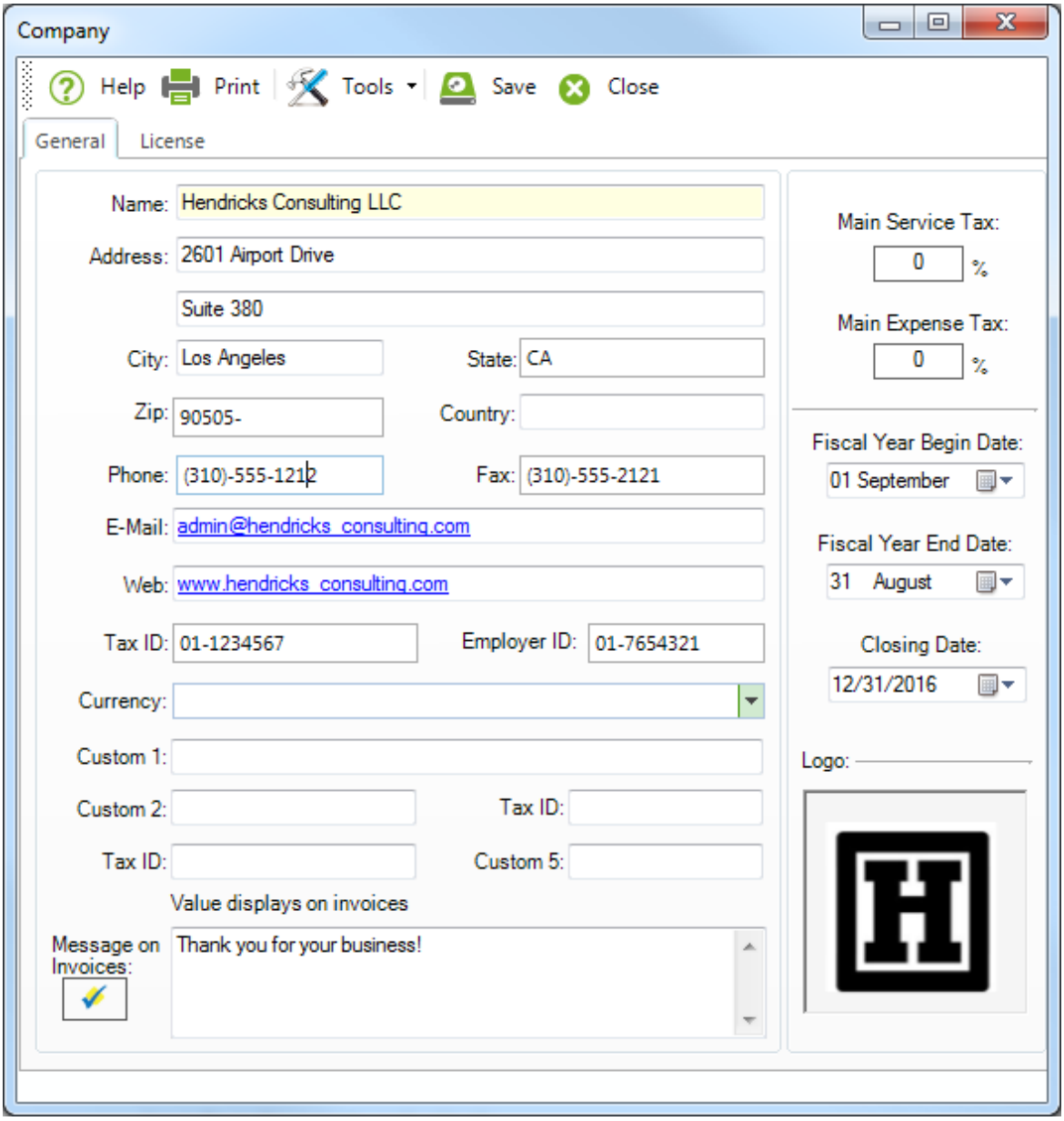
Right-Click Payment



To save you time and effort, BillQuick enables you to record payments right from the Invoice Review screen. You can just right-click on an invoice and select the Payment option. The Payment screen opens with the client and project data pre-filled, saving you time and effort.

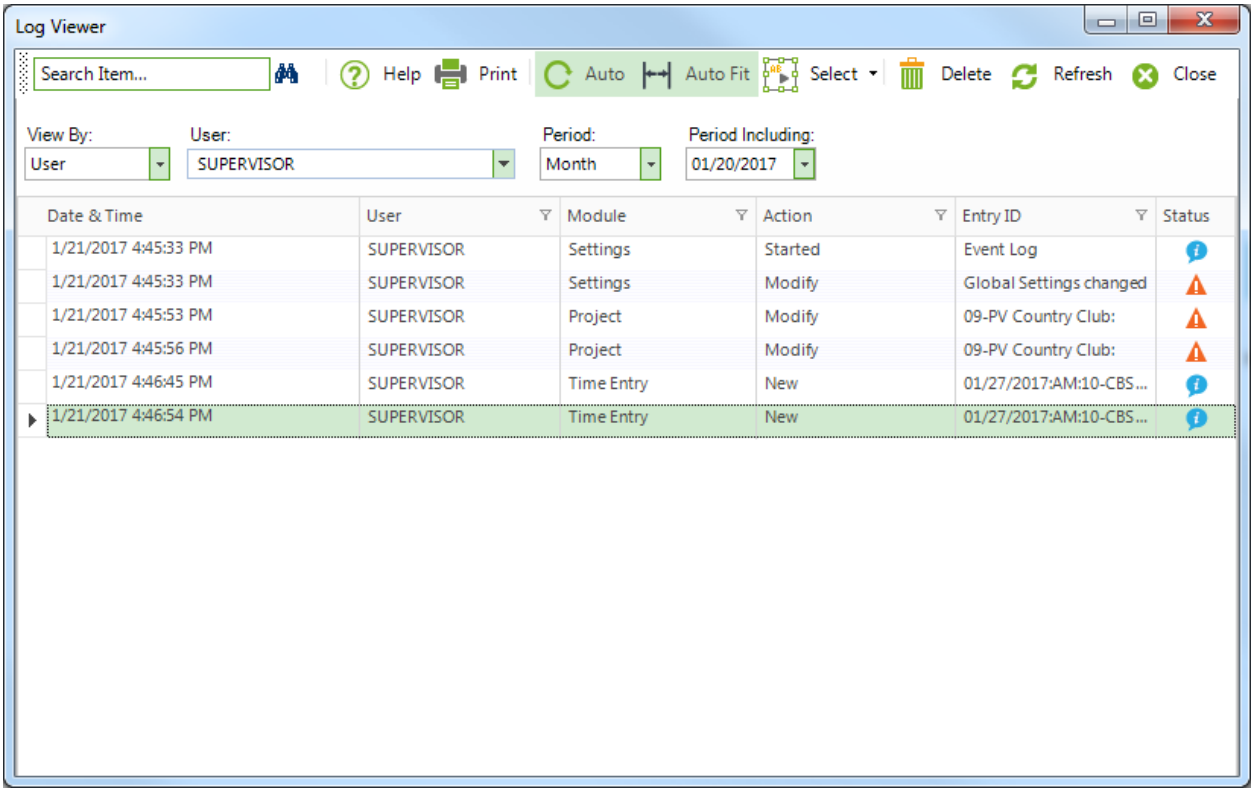
SECURITY TIPS

Closing Date



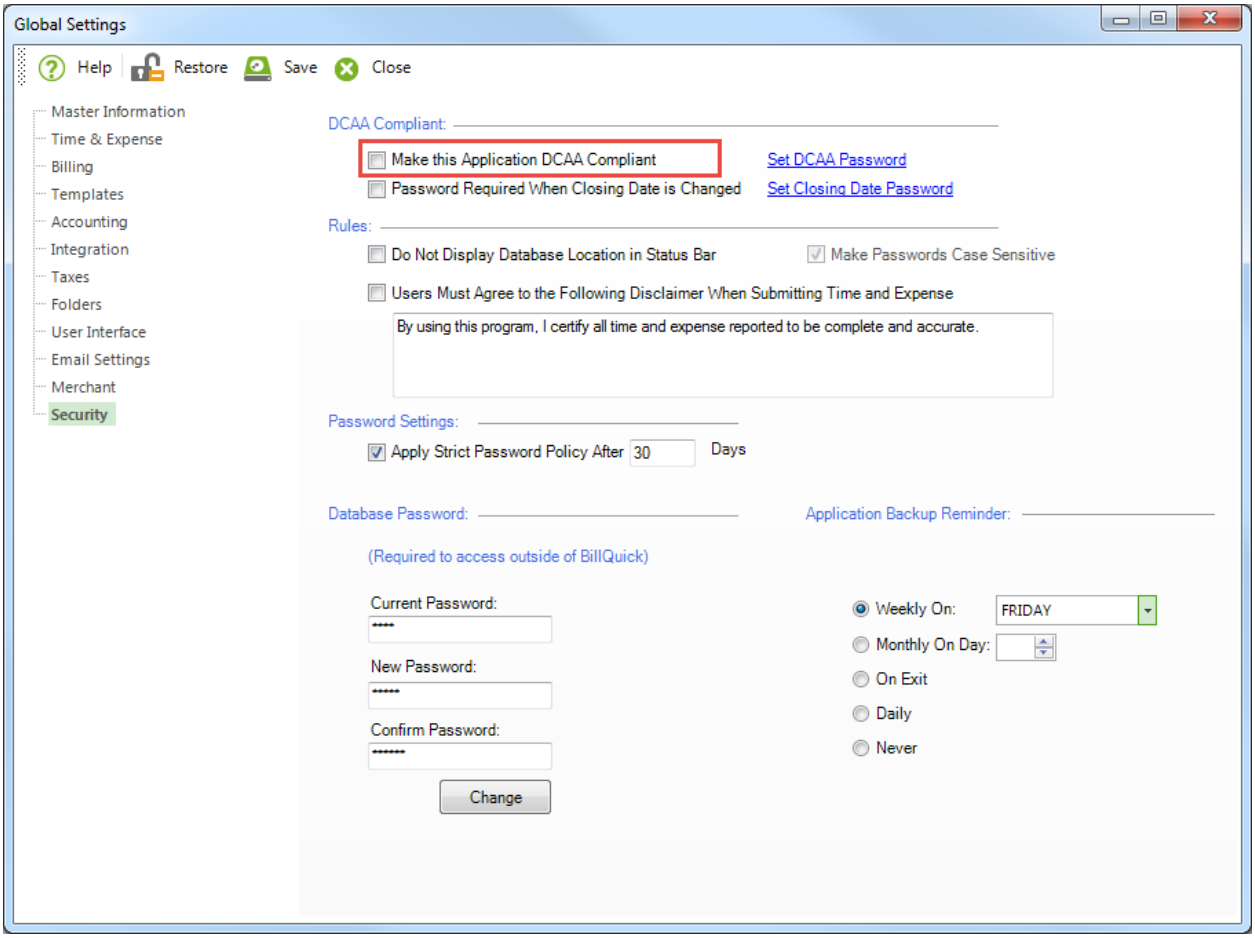
If you specify a closing date for your company, it prevents any unauthorized or untimely editing of your company data such as time, invoices, and payments on or before that date. You should enter a Closing Date for your last accounting period in the Company screen. This is a good security feature that ensures your data remains accurate and secure.

Audit Trail



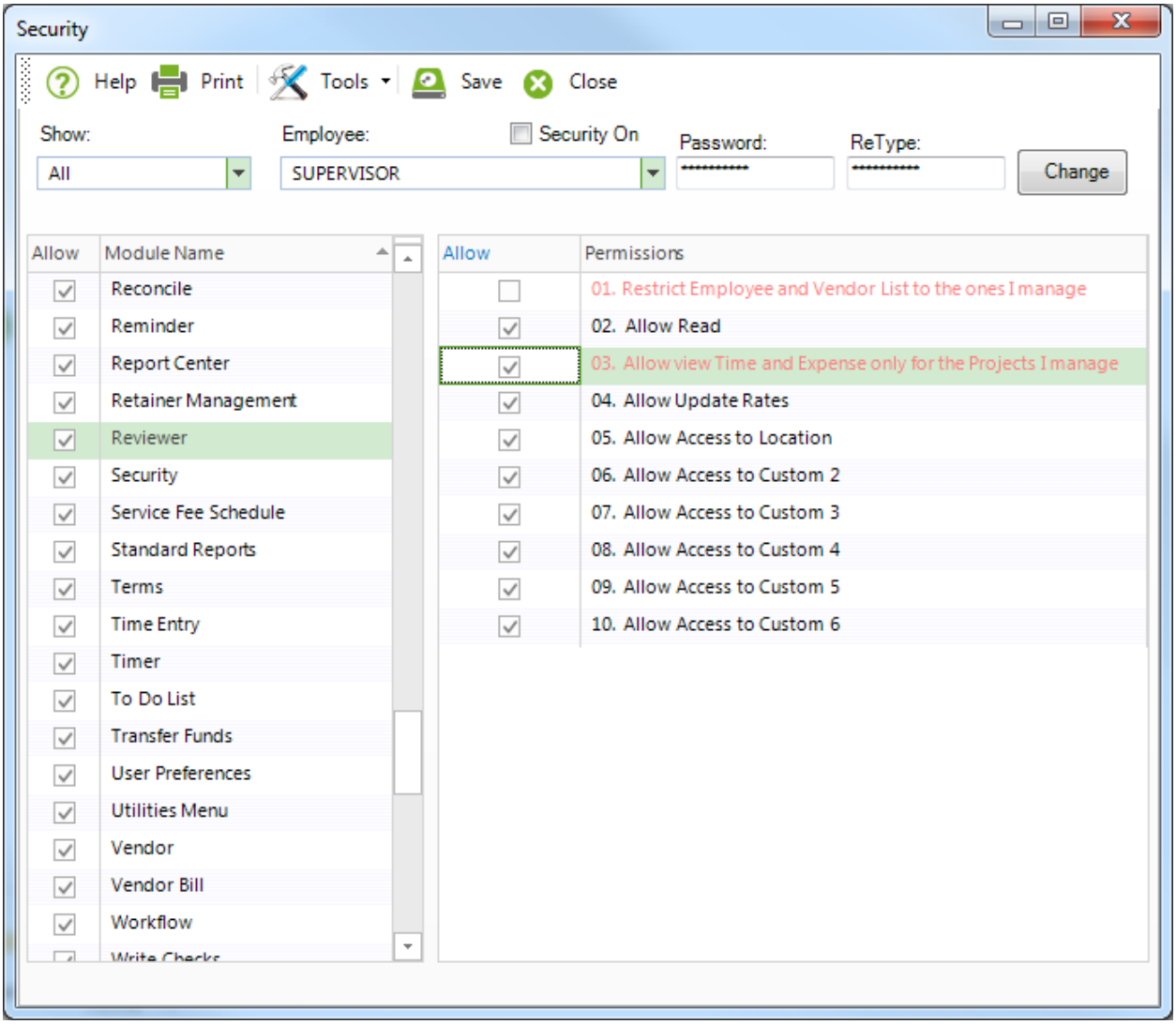
You can maintain an audit trail in BillQuick by checking that option in Global Settings. The Log Viewer keeps track of all the key actions taken by your BillQuick users and displays detailed information as well as visual status on them such as warning, information, billing-related or any other item. BillQuick also maintains a text log file, which you can read with a text editor or word processor.

Single-Click DCAA Compliance



Government contractors and agencies require their time tracking systems to be DCAA compliant. You can make BillQuick DCAA compliant with a single-click. Check this option in Global Settings and set a password for it. From now onwards, BillQuick overrides the existing or default security settings and implements tighter security in compliance with the DCAA requirements.

Project Manager Security



Typically, project managers need to review the time and expense entries of all the projects they manage for approval, besides their own entries for projects they are working on. BillQuick has a special security setting that exactly allows them to do so. By setting the security 'Allow View Time and Expense Only for the Projects I manage' for Reviewer (as well as Time Entry and Expense Entry), BillQuick automatically filters out other time and expenses, and displays only the relevant entries for the project managers. This gives them full visibility of time and expenses they are responsible for while maintaining security on others.

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