



# Elite Implementation Kit



## Elite Implementation Kit

**B**uild a solid foundational training on how to use the most important features of Core. The Elite Kit is a valuable way to make sure Core is set up to fit your business' unique needs so you can start confidently using it right away.



## Dedicated Setup:

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### We Conduct a Personalized Needs Analysis

Hours 2

- Your consultant will send an initial questionnaire regarding your billing and management processes.
  - They'll review your responses and schedule a call to discuss your current workflow to further drill down to identify bottlenecks and obstacles.
  - *It is required that your team that will be responsible for the initial set-up of Core be available during this time.*
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## Training Courses:

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### Foundation Setup Training

Hours 2

- This course covers time and expense set up and review for manager level team members. The focus on this course is how to set up the submit and approval processes as well as how managers can efficiently review their staffs time and expense entries as well as managing time off requests and calculating overtime.
  - *Managers responsible for approving and review of time and expense slips in Core should attend.*
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### Project Setup

Hours 2

- Learn how to set up active projects (hourly, fixed fee and internal); including building project details, teams, phases, job codes, invoice method and setting up budgets for both fees and time.
  - *Employees who are responsible for setting up and managing projects should attend.*
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### Time and Expense Entry – Staff Level

Hours 2

- This course covers the fundamentals of how to enter time and expenses through the different options we offer in Core. This course is designed for your staff so they understand and develop good time and expense practices for efficient and accurate time entry. We'll be sharing some tips and tricks to enhance their day to day task of entering time.
  - *Employees who are recording time and expenses in Core should attend.*
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### Time and Expense Entry – Manager Level

Hours 2

- This course covers time and expense set up and review for manager level team members. The focus on this course is how to set up the submit and approval processes as well as how managers can efficiently review their staffs time and expense entries as well as managing time off requests and calculating overtime.
  - *Managers responsible for approving and review of time and expense slips in Core should attend.*
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## Billing in Core, Part 1

Hours 2

- Learn how to set up the key aspects of billing: Clients, Projects and Global Settings. We discuss your existing pre-billing process so we can utilize key reviewing capabilities and our robust reporting in Core to match your pre-billing review needs.
- *Employees who are responsible for pre-billing analysis, billing or post-billing analysis should attend.*

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## Billing in Core, Part 2

Hours 2

- Learn how to get your billing is done: creating invoices, entering payments and important billing reports.
- *Employees who are responsible for pre-billing analysis, billing or post-billing analysis should attend.*

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## Post Billing in Core

Hours 2

- Learn how to run statements, enter retainers, credit memos, invoice collections and recurring invoices. As a billing manager or accountant, you will learn how to email statements to your clients, apply retainers to client invoices, set up and process recurring invoices for your on-going projects. Where applicable, you will learn how to apply a credit to your client account. For the past due invoices, you will learn how to overcome the collections challenge.
- *Employees who are responsible for pre-billing analysis, billing or post-billing analysis should attend.*

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## Project Management

Hours 2

- Learn how to utilize the powerful project management tools. We will help you collaborate with your team and manage your projects to ensure profitability. We will review the key performance indicators of your projects, assign items, and track projects from the initial estimate stage to the final budgeting and billing stage. You will also learn about task allocation, forecasting, submittals, RFIs as well as drawings associated with the projects.
- *Employees who are responsible for managing project performance and analysis should attend.*

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## Core Accounting Training

Hours 6

### *Option 1: Accounting Module*

Core provides a robust fully integrated accounting system to manage all your financial tracking and reporting needs:

- Learn how to set up understand the basics of accounting in Core including setting up your chart of accounts, check register, perform reconciliation, purchase orders, vendor bills, recurring bills, bill payments, credit card charges as well as checks, journal entries and deposits. You will learn how to manage all your accounting needs.

### *Option 2: Accounting Integration*

If you choose to maintain your current accounting software, we can then learn how to integrate with your online version:

- We set up your accounting integration so that it's as seamless as possible. You'll learn how to properly integrate your accounting information and become aware of how it all works. You'll know Sync Settings and how to use the Smart Match utility to map your existing accounting information.
- *Employees who perform the data sync as well as those who define how the accounting system is structured should attend.*



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### Billing Follow-Up and Q&A

Hours  4

— We give you an overview of your first billing and answer any remaining questions you may have.

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### Total Training Hours Included

26

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## Grand Total of Hours Included in the Elite Kit

28

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All steps will be coordinated by your single-point-of-contact BQE implementation expert.

FOLLOW US



# World Headquarters

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