

Succeed 2017

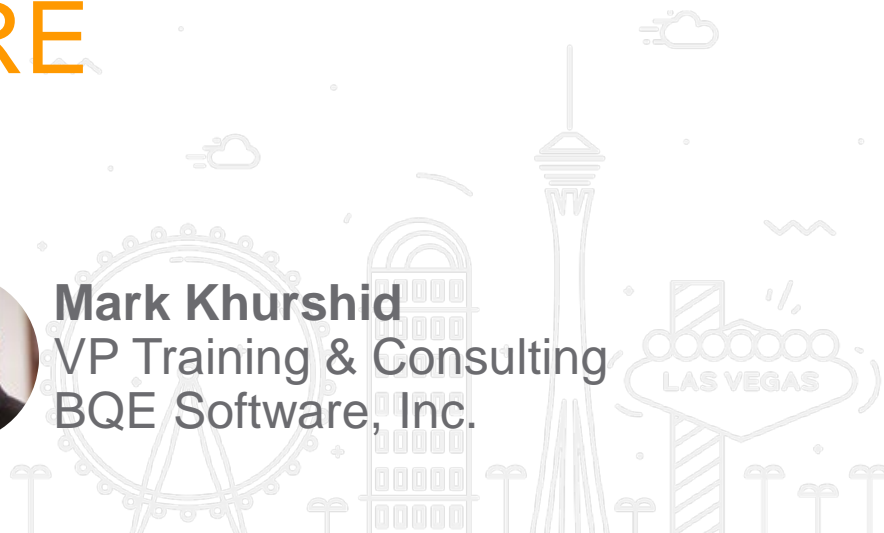
Upgrading Your Firm To CORE



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What We Will Learn

- Why should I upgrade to Core?
- Which BQE legacy products will migrate?
- Things that don't migrate to Core
- What do I need to do to migrate to Core?
- What kind of assistance will BQE offer?

Why CORE?

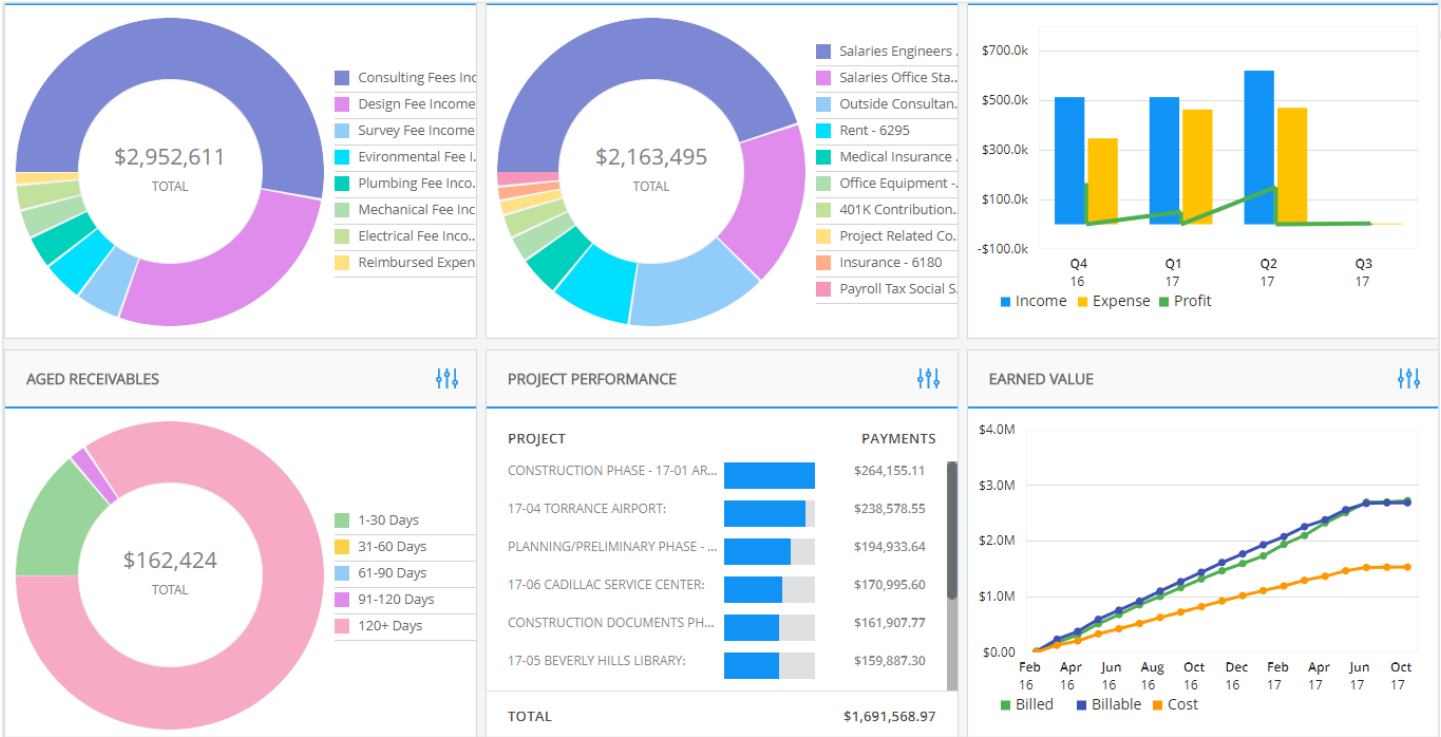
- Core is pure cloud-based
- It uses the state of the art technology
- Core platform is built on a system of APIs
- Live bank & credit card feeds
- Built-in report scheduling
- Fully-functional Core mobile app



Why CORE? (continued)

- Business intelligence presented on beautiful and powerful role-based dashboards
- Tracking project, client and employee KPIs made easy
- Subscription fee based on what you use
- Ease of use and smooth flow requires a very little hand-holding

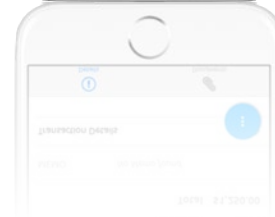
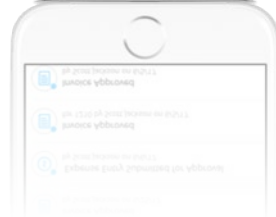
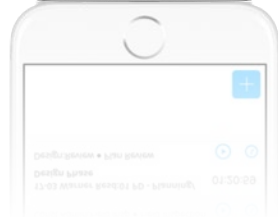
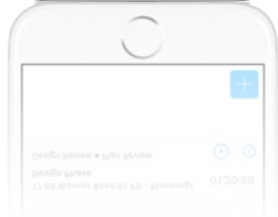
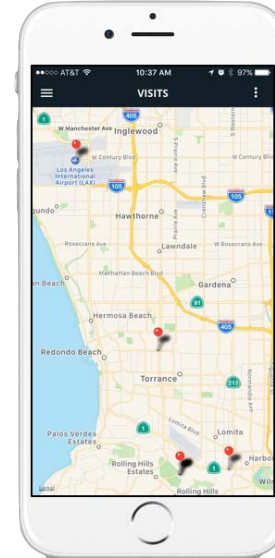
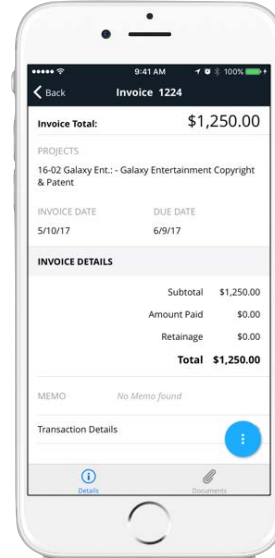
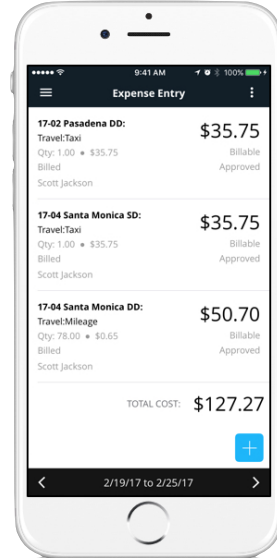
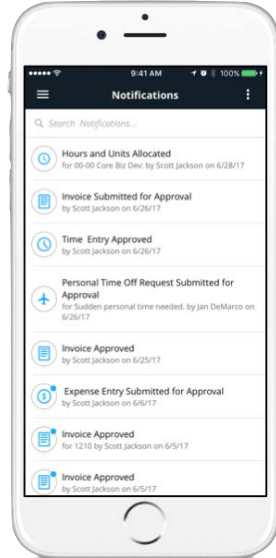
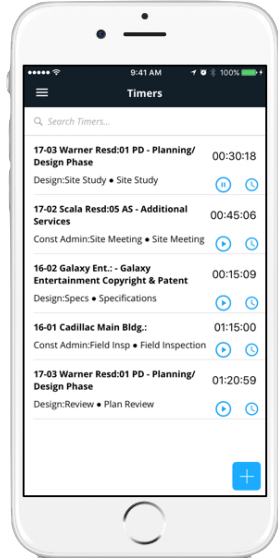
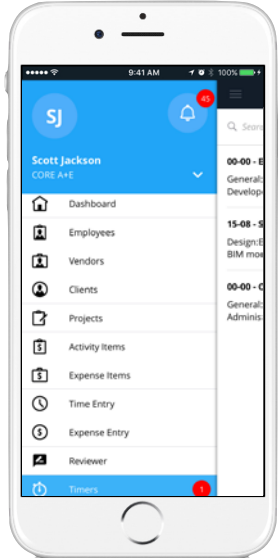
Business Intelligence Dashboards



Business Intelligence KPIs



Fully Functional Phone App



Built-in Report Scheduling

The screenshot displays the 'Reports' interface with the 'SCHEDULED' tab selected. A modal window titled 'Manage Group Settings for Management Reports' is open, showing the following configuration:

- START DATE:** 11/1/2017
- END DATE:** 12/31/2020
- FREQUENCY:** Monthly
- PROCESS TIME:** 07:59 AM

The 'EMAIL RECIPIENTS' section includes:

- Employee Group:** 1 Item(s) selected
- Team:** Attached are your monthly management reports.

The background interface shows a table with columns 'GROUP/REPORT' and 'DESCRIPTION'. Under 'Management Reports', the description is '07:59 AM, Monthly every Monday, Starting 11/1/2017 and Ending 12/31/2020'. Two reports are listed: 'Work In Hand' and 'AR Aging with Credit Payments', both with checkboxes.

Live Bank and Credit Card Feeds

Bank Feeds

Actions ▾ More ▾ + Add Account

CORE ACCOUNT ▾

Amex Corporate Card - 1005

Well Fargo Savings - 1001

Wells Fargo Checking - 1002

Step 1- Connect Site [X]

Link Accounts

1. SELECT A SITE 2. VERIFY CREDENTIALS 3. VIEW ACCOUNTS

Select your institution from the list below or search.

Q Institution name

SUGGESTED SITES (based on your transactions)

PayPal (US)
<https://www.paypal.com/in/webapps/mp...>

MOST POPULAR SITES

Capital One 360 https://www.capitalone.com/bank?bc=y...	USAA https://www.usaa.com/
American Express Cards https://www.americanexpress.com/us/	Nedbank (South Africa) https://netbank.nedsecure.co.za/
Citi Credit Cards https://www.citi.com/credit-cards/citi.acti...	Wells Fargo https://www.wellsfargo.com/

TIPS

ACCOUNT TYPES

You can link all sorts of accounts. Some examples are:

- Checking
- Savings
- Credit Card
- Rewards
- Investments
- Retirement
- Bills (e.g., utilities, cable, phone, insurance)

ENDING TRANSACTIONS

163

161

5

Subscription Based On What You Use

Subscription Packages [← Back to Manage Subscriptions](#)

All prices are in USD

TIME EXPENSE

Time and Expense Management

[View modules included](#)

CHOOSE PACKAGE

<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
\$11.95 /mo.	\$10.95 /mo.	\$9.95 /mo.	\$8.95 /mo.	\$7.95 /mo.
MONTHLY	QUARTERLY	YEARLY PLAN	TWO YEAR	THREE YEAR

QUANTITY

1

\$119.40

You save \$24.00

ADD TO CART

Which Legacy Products Will Migrate?

- All flagship BQE products will migrate:
 - BillQuick / BillQuick Online
 - ArchiOffice / ArchiOffice Online
 - EngineerOffice

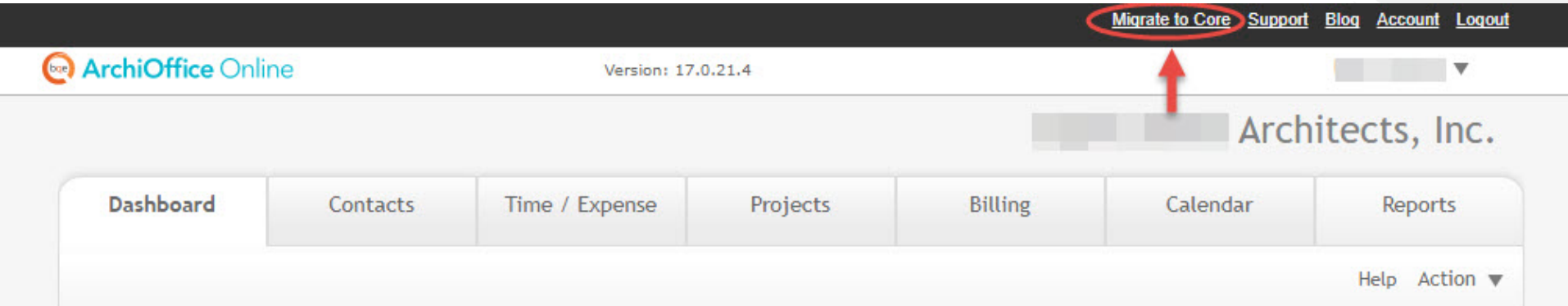
What is Not Going To Migrate to Core?

- Custom Reports/Invoices
 - We will re-design your custom reports/invoices for a nominal fee
- Custom Programming
 - It is on our roadmap to make Core APIs public

What Do I Need To Do?

- Download and install data migrator
 - Applies to BillQuick and ArchiOffice on-premise
 - Link to download: <http://www.bqecore.com/migrator>
- BillQuick Online & ArchiOffice Online
 - Will have In-App “Migrator Link”

Migrate AO, EO & BQ Online to CORE



ArchOffice Online

Version: 17.0.21.4

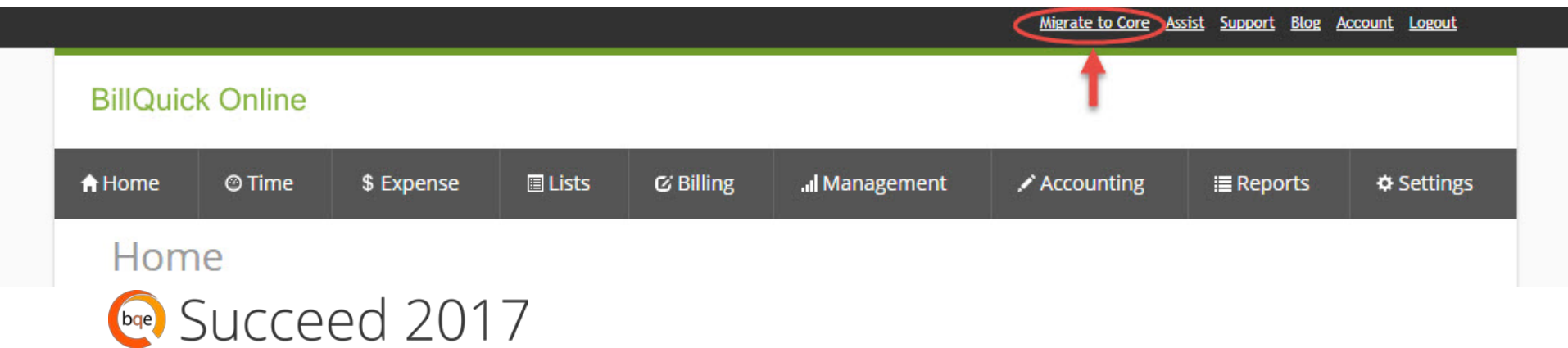
[Migrate to Core](#) [Support](#) [Blog](#) [Account](#) [Logout](#)

Architects, Inc.

Dashboard Contacts Time / Expense Projects Billing Calendar Reports

Help Action ▼

Detailed description: This screenshot shows the top navigation bar of the ArchiOffice Online application. The 'Migrate to Core' link is circled in red, with a red arrow pointing to it from below. Other navigation links include Support, Blog, Account, and Logout. Below the navigation bar, the user's name 'Architects, Inc.' is displayed. A secondary navigation bar contains buttons for Dashboard, Contacts, Time / Expense, Projects, Billing, Calendar, and Reports. A 'Help Action' dropdown menu is visible on the right side.




BillQuick Online

[Migrate to Core](#) [Assist](#) [Support](#) [Blog](#) [Account](#) [Logout](#)

Home Time Expense Lists Billing Management Accounting Reports Settings

Home

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Detailed description: This screenshot shows the top navigation bar of the BillQuick Online application. The 'Migrate to Core' link is circled in red, with a red arrow pointing to it from below. Other navigation links include Assist, Support, Blog, Account, and Logout. Below the navigation bar, a secondary navigation bar contains buttons for Home, Time, Expense, Lists, Billing, Management, Accounting, Reports, and Settings. The main content area displays the word 'Home' and the 'bqe Succeed 2017' logo.

Built-in Report Scheduling



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Automatic Bank & Credit Card Feeds



Pay Only For What You Use

Q & A



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facebook.com/bqesoftware



@bqesoftware



youtube.com/bqesoftware

SALES

+1 (866) 945-1595

SUPPORT

+1 (310) 602-4030



Your voice matters.

Rate this session on BQE Succeed Mobile App (Search for Bizzabo).

Or biz.bo/07033



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