



# Promise Package



## Promise Package

**W**ith the Promise Package, you get a dedicated Core expert in your corner. In about four weeks, we'll manage your data migration process, train you, assist you with your first billing and follow up with you every week for a month to make sure you're up and running smoothly. The individuals who supervise Core in your company should attend all sessions.



## Dedicated Setup:

### 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.*

### Implementation Project Plan

Hours 2

*We will lay out the timeline, resources, services and training schedule.*

- We Recommend Solutions: Our consultant will recommend solutions to the issues identified during your Needs Analysis and schedule the specific training and consulting sessions that will help you achieve agreed upon goals.
- Schedule Project Timeline: The timeline for implementation (ie: schedule of trainings, consulting, and estimated length of Promise Package Services) will be laid out at this time.

### Migrate Your Data

Hours 37\*

*The Data Migration Process:*

1. We receive and convert your current database.
2. We perform the BQE Accuracy Check.
3. You perform the Customer Accuracy Check.
4. We make edits, if necessary.

The final database is loaded into your new BQE solution.

*\*Standard data conversion brings over information needed for Core. This includes invoices and payments (Accounts Receivable). If you want BQE to import your chart of accounts, Accounts Payable and other accounting data, please inform your Account Manager to schedule that as a separate service.*

## Training Courses:

### Setup and Customizing Preferences

Hours 2

- Learn how to set up Core defaults including account setup, basic Core navigation, company setup, general company and user preferences, including user security to be aligned with your firm's policies. — Employees who are setting up these items should attend.
- *Employees who are setting up these items should attend.*

Hours 2

### Foundation Setup Training

- Learn how to set up master information like Employees, Vendors, Clients, Activity and Expense Codes, and Custom Labels, in addition to in-depth coverage of Global Settings related to master information.— Employees who are setting up these items should attend.
- *Employees who are setting up these items should attend.*



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## Project Setup, Part 1

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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## Project Setup, Part 2

Hours 2

- Continue to learn how to set up and manage active projects including setting fee schedules and assignments.
- *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, Gantt charts, 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 your accounting program is structured should attend.*

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## Training of Your Choice

Hours 6

- This is the perfect solution to help you as you move through the Core application. We can supplement your regular trainings and focus in on specific topics of importance to you. This also provides the opportunity for us to review already learned functions in Core. Your consultant can assist in guiding you through additional trainings relevant to your specific needs.

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## First Billing Coaching

Hours 2

- We coach you through your first billing and teach you how to send invoices quickly and smoothly every time.
  - Employees who are responsible for pre-billing analysis, billing or post-billing analysis should attend.
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### Four Weekly Follow-Ups

Hours 

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- We follow up weekly to consult with you and answer any questions you may have.
- Employees responsible for setting up and managing projects should attend.

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Total Training Hours Included

38

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## Grand Total of Hours

79

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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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