



### Version 1.1.37 released on October 22, 2017

#### **What's new in this version?**

This update delivers over 150 improvements and fixes. The most notable are listed below.

- Project Ajax drop-downs will now support parent-phase hierarchy and display results accordingly. Users can now search for main projects and all underlying phases would be available for selection. Conversely, searching for phase would display all matching phases and the complete hierarchy.
- Batch change screens were not able to handle fields with a Yes or No value. This problem is now solved by providing indeterminate checkboxes
- Project status dashboard widget now allows for view by contract or budget amounts.
- Core now makes a nomenclature distinction between a subscription and a package. All button and column heading now reflect the appropriate term.
- Core would now prompt the user if they wanted auto-assignment of subscriptions when purchasing the first subscriptions for the Company.
- Project template module would not display the structure of a template in a hierarchical manner. This was fixed.
- Projects created from project templates would not reflect the phase id of the underlying template. This was fixed
- Added WUD columns to Time entries and Time & Expense reviewer.
- An issue in the batch invoicing module would reset the billing from and to dates if any time or expense entries were excluded. This was fixed.
- QBO sync module in Core was not providing detailed logs during the sync process. This was fixed.
- Core accounts that had expired were still able to access the Sample companies. This was fixed
- Users were able to update Company and profile information for Sample companies. This was fixed.
- The Custom fields' management screen was missing the Company module. This was fixed.
- Time entry and Reviewer would fail to show up all entries even though there was no visible filter. This was fixed
- Project Status widget now provides an option to view Contract or Budget amount.
- Project Status widget now rolls up spent, billed and other amounts for all phases and shows them against the main project
- Added new reports Contract Analysis, Project Profitability(Comprehensive), Billing Schedule-Tab

- Info bars in all master screens did not adjust to the filters provided to the list view. This is fixed.
- Expense entries marked as reimbursable were not picked up by the Check detail screen. This was fixed.
- Several security recommendations were implemented to mitigate any risks from attacks.

### Version 1.1.28 released on October 8, 2017

#### What's new in this version?

- **Introducing Bank Feed Rules:** Core now allows bank feed users to set up rules that automatically import bank feeds into Core. This brand new feature is complimented by powerful rule definition and management UI to completely automate the import feed process.
- **Introducing Report Scheduling:** Core now offers powerful report scheduling that users can set up for any interval and frequency. Users can add unlimited number of email recipients or simply specify employee or client groups as email recipients.
- **Project Status and Due Dates Dashboard widgets:** These widgets provide a clear picture of the project/phase performance regarding billed, spent, WIP, open AR and other important metrics. This powerful, standalone widget now empowers project managers to make more informed decision while estimating project percent complete. The brand new project due dates widget provides an informative list of all projects that are approaching due dates.
- **The power of custom invoices:** Core now supports custom designed invoice templates for customers who use our invoice customization services. Please contact BQE Support to get started on this.

This release has over 400 other improvements. Some of the notable highlights.

- Core users can now setup "Message on Invoice" in the global settings and all new projects would automatically inherit this setting. Also, users have the ability to issue a batch change for existing projects.
- Core Project transactions now offer the drill-down feature. Click on the transaction and view it in its own window.

- Project Batch change interface now supports PO#.
- Bank feed users now have the ability to view the type of transaction that would be created when adding a new feed to Core.
- Project rule that controls display of MST/MET on invoices is automatically set to true if values are entered for Project MST or MET fields.
- Pay when paid features was enhanced to auto-launch a report that provides detail for the all vendor bills that are part of the invoice that is getting paid.
- Added the much requested Project filter in Payment list
- Added Project type filter to Project list and all project reports
- Added the much requested Last Emailed column to Invoice List
- Added Charge Amount field in Expense details in Batch Invoice Details.
- Added the Cost field in the adjust reconciliation discrepancy interface.
- Core now allows users to specify a memo while adding a bank feed as time or expense line item
- Account register for Opening balance equity account now provides a Journal report.
- Time and Expense entry screens did not allow update of entries that were linked to projects that were either cancelled or put on hold. This was fixed.
- Vendor bill list can now be filtered by time or expense entry status also.
- Project drop-downs on Create Event interface now support ajax type ahead
- Payment screen would not remember the columns that had been turned on by the user
- Some users would lose subscription permissions temporarily if they accessed the package drop-down in Manage Users. This was fixed.
- There was an issue in the time verification report causing it to double the time entries. It was fixed.
- An invited user was able to log in to the invited company if they had existing account in Core without accepting the invitation. The desired behavior is to get the user click on the invite link and do the necessary on-boarding. This was fixed.
- Sending Core employees to QBO would fail if a SSN had been specified for the employee. This was fixed.
- Some filters for dashboard widgets would not function in the desired manner and not show up any data. This was fixed.
- Some filters in the Reports area would not provide the correct UI for range filters. This was fixed.
- Invoice template would double the hours for a manual invoice that had both amount paid and retainer. This was fixed.
- Time and expense memo was getting ignored for vendor bills that were created from existing vendor entries. This was fixed.
- Employee based report control would apply the control to all users and not just the intended employee. This was fixed.
- Manual invoices created from existing estimate would not obey the date from and to that were specified in the Create Invoice dialog. This was fixed.
- There was an issue related to entering memos when using Safari browser in the Time card. This was fixed.
- Payment date would in-correctly be set yesterday's date although the user would specify today's date for the payment. This was fixed.
- Bank feeds "find matches" algorithm would fail to retrieve credit card refund entries. This was fixed.

- Dashboard group filters would not show the default "ALL" group as one of the options. This was fixed.
  - Reversing the inclusion of bank feed would cause the underlying entry to be also deleted. This was fixed.
  - Create new account of any balance sheet type would error out on certain company country settings like Finnish. This was fixed.
  - Project time and expense report would not honor the "Show memo" setting. This was fixed.
  - Payment disbursement screen was not correctly calculating the disbursements if the invoice being paid had a discount or retainer. This was fixed.
  - PTO reports would fail to show the approver's note. This was fixed.
  - Bank feeds transaction would reset date filters to default after a transaction was marked as ignored by the user. This was fixed.
  - Employee allocations were not correctly getting forecasted in the Forecasting screen if the employee had non-standard day or week hours. This was fixed.
  - Forecasting screen would ignore tasks that were linked to projects with the rule "Rates from Activity table" set to true. This was fixed.
  - Subscriptions created in Core would show an expiry date which was a day short than the expected date. This was fixed. Also, the Manage user interface would not allow admin users to remove expired subscriptions from a Core user. This was also fixed.
  - Core would not properly handle a scenario that involved a user selecting a mix of late fee and regular invoices for preview in the Invoice list screen. This was fixed.
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## **Version 1.1.13 released on September 3, 2017**

### **What's new in this version?**

1. Smart fields for Email Settings
  - Users can now set up company or user level email subject and message fields to use smart place holders that are replaced with actual values while emailing invoice, reports, statements and payment receipts.
2. Pay when paid feature
  - Core now prompts users to settle their payables as soon as they receive a client payment for an invoice that has time or expense entries linked to an unpaid vendor bill.
3. Time and Expense line item support for Bank feeds

- Bank feeds can now be imported into Core as Time or Expense entries. These entries are imported into Core as line items for check or credit card transactions.
4. CSV export for Report Viewer
- Users now have option to export reports to an Excel CSV format. This format gives users the power to use report data for aggregation and charting in Excel.

This update also fixed over 270 high and medium level known issues. Some of them have been highlighted below.

- Compose Email was not able to handle multiple email addresses. This was fixed.
- Project opening balance feature would accept not a combination of opening balance fields whose sum was equal to zero. This was fixed.
- General Journal, Credit Card and Custom Label quick text based filter feature was not working as expected. This was fixed
- Core would not allow vendors to be added as Core users. This restriction was removed.
- Vendors would not appear in the Security permissions list. This was fixed.
- Users of type vendor were not able to fill in their time card. This was fixed.
- Expense entry detail view was missing the paid status and paid date fields. These were added.
- Company chooser screen that shows up for users with multiple Core companies did not provide any information about the Company status. This was fixed.
- There were issues if a user tried to delete a Vendor credit line item. This was fixed.
- Some of the reports would not show correct Company name in the header when emailed from the reports area. This was fixed.
- Reset Custom labels in Custom Labels section under Global Settings would incorrectly introduce masks for all custom labels. This was fixed.
- Documents added in Core would not show the correct date and time for the created on field. This was fixed.
- QuickBooks and AccountRight set up page would open in the same window as Core. This was fixed.
- A duplicate General Journal warning would make the interface unresponsive to user input. This was fixed.
- Invoices with hyperlinks as documents would fail to be emailed. This was fixed.
- Project parent level rules were not getting copied to the project phases. This was fixed.
- Many financial reports would incorrectly show non-posting accounts and types as filters. This was corrected.
- Core would not automatically update the Display As field while creating a new company if the value was first entered in the Company field. This was fixed.
- Added Pay rate multiplier and OT multiplier to Fee Schedule, Service based line items.
- An expense entry would not be submitted to the correct PM if the entry had been submitted earlier and the PM had changed since then.
- A recurring check processed notification would not reflect the correct name of the user. This was fixed.

- PTO screen and widgets would not show the correct data if the default codes for vacation, comp and sick were changed in global settings. This was fixed.
- PTO screen, new entry would not default to the current day. This was fixed.
- Credit card, checks and Vendor bill screen would also include inactive accounts in the account drop-downs. This was fixed.
- Time and Expense reviewer would not show any records if a submitted time or expense was approved or rejected by a user via notifications area. This was fixed.
- Phases that were being created by using templates would not respect the Project display as setting. This was fixed.
- Add licenses feature was calculating an incorrect amount for the new subscriptions. This was fixed.
- Core would through up an error if a user clicked the detail view action for an “added in core” bank feed if the underlying core transactions were deleted. This was fixed.
- More than 270 other fixes that improve application’s usability, reliability and performance.

### **Version 1.1.6 released on August 20, 2017**

This update fixes more than 150 known issues and adds few new critical features to the application.

- ❖ Project structure tab in Project detail view now offers additional column options to allow Project managers’ to make a more informed decision while updating the percent complete.
- ❖ Added a legacy feature that allows users to import existing vendor time and expense that is not part of a previous vendor bill. This feature is available from the Create Vendor bill screen.
- ❖ Core now offers users the ability to create vendor bills from received Purchase order line items that were not made part of a vendor bill during the items receipt process.
- ❖ Core now offers intuitive color coding for Forecasting screens to alert users for allocations that are over the assigned values.
- ❖ Core now allows QuickBooks integration users to initiate a ‘Get all’ and ‘Send all’ sync.
- ✓ Manage companies module would not appear for Core users that were marked as standard. This is fixed.

- ✓ Notifications related to time and expense submittal or approval would occasionally omit the sender name. This was fixed.
- ✓ Time entry client hours (formerly known as B-Hours) would not get updated when an entry was updated in the Time card screen. This was fixed.
- ✓ Some fields in batch invoicing screen would not reset to original values when the batch invoicing screen was refreshed. This was fixed.
- ✓ Late fee invoices generated from the invoice screen would occasionally not have the correct next sequential invoice number. This was fixed.
- ✓ Allocation screen would allow user to allocate units for projects of type 'Main'. This was corrected.
- ✓ Time entries would get duplicated if a user navigated to the next/previous week while the saving the time card. This was corrected.
- ✓ On certain occasions, time or expense submit notification would not display the underlying entries when a user clicked on the submit notification. This was corrected.
- ✓ Core would not stop users from entering time for projects that were not active. This was corrected.
- ✓ Invoices that were over paid or had a negative amount were appearing in the create payment screen. This was fixed.
- ✓ Subscription purchase shopping cart would display the wrong total amount if user navigated back to the subscription list and added a new subscription. This was corrected.
- ✓ Owner account for a company was not able to login if the linked user was changed for owner account. This was corrected.
- ✓ Email without preview was not available as an option in the Collections screen. This was fixed.
- ✓ PTO info bar would show incorrect numbers for vacation and sick time if the employee had multiple PTO requests. This was corrected.
- ✓ There was instances of modal dialogs overflowing the browser boundary and not display correctly. This was corrected for Dashboard and Batch invoices.

### **Version 1.0.211 released on July 30, 2017**

- Core now offers trial users an easy way to switch between sample companies even when they are already signed in their company file. Users will also have the option to exit the sample file experience without logging out.
- Core was not able to accept fresh signup requests from users who had aborted the signup process midway or the company creation had not successfully completed in a previous attempt. This was fixed.
- Register screen will now offer the ability to view and enter memo for each transaction.
- Register screen, View by "Account" drop down now supports type ahead search.

- Core was incorrectly prompting users to enter a check number while creating a new check in the Register. This was fixed.
- Added Client column to Invoice list view.
- The “Trial expiring in ...” indicator would animate away for trial companies. This was fixed.
- Users are now warned to not close the browser while a company file is being created.
- General UI/UX improvements.
- Other minor fixes related to Core business logic.

### **RTM Version 1.0.207 released on July 19, 2017**

#### Dashboards

### **Get a snapshot of your whole business every time you log in**

- See how your entire business is doing in an easy-to-understand graphical interface
- Create unlimited, customizable dashboards to suit your needs
- Display your business key performance indicators (KPIs) exactly how you want to see them
- Easily change the size, shape, and color of pie charts, bar graphs, and interactive lists

#### Time & Expense Tracking

### **Know exactly where you stand**

- Flexible time entry – track time how you want to with simple timecards and timers
- Easily start and switch between multiple timers
- Record expenses in multiple currencies and attach receipts
- Auto-populate your timesheet with previous week’s activities and projects
- Track time and expenses on-the-go via free native iPhone and Android apps

#### Project Management

### **Make the best use of your resources for the greatest profitability**

- Watch the status of tasks by phase
- Powerful multi-level submittal and approval process for time and expenses, budgets, estimates, vendor bills and invoices



- Efficiently manage people with smart tools for resource scheduling, allocation and utilization
- Track budget vs. actual hours and costs in real time
- Track submittal-approval, drawing and RFI workflows

## Billing

### **Cut your billing time in half and improve cash flow**

- Tailor your communications with dozens of professional and customizable invoice templates
- Create different invoice types: percent complete, retainer, recurring, fixed, hourly, phased, joint and more
- Send multiple invoices in a single email
- Choose from convenient billing methods: Automatic, Progress, Manual and more

## Accounting

### **Manage all your transactions in one place**

- Easily manage vendor bills and purchase orders
- Write checks and reconcile bank accounts
- Connect to bank feeds anywhere in the world
- Quickly access General Journal Entries, Registers and General Ledger
- Generate accrual and cash-based balance sheets, as well as profit & loss reports

## Reports

### **Get actionable insights at your fingertips**

- Access hundreds of standard reports that are fully customizable
- Create memorized reports and tag any report as your favorite
- Customize reports and share them as PDFs, Word documents, or Excel files.
- View breakdowns of utilization, realization and billable work for employees as well as consultants

## Mobile

### **Manage your business on the go**

- Monitor to-dos and submit/approve workflows via dashboard

- Enter and review time and expenses from any device
- Use multiple timers to track every billable minute
- Convert your project visits into time entries with visit tracking
- Quickly create invoices and apply payments
- Stay up-to-date with real-time notifications

Integration

## **Seamless integration with other products**

### **QuickBooks®**

When you integrate Core and QuickBooks®, you gain a lot more than elimination of duplicate data entry. You get a powerhouse that will that will save you time, money and resources.

### **MYOB AccountRight® (Australia)**

Whether you're a one-person office or a large, network-based organization, Core offers MYOB users a dramatically streamlined method for invoicing, tracking time and expenses, and much more.

### **Dropbox, Google Drive, and Amazon Web Services (AWS)**

With Core, you can work from anywhere in the cloud. Plus, you can simplify how your team works and share files through your favorite apps. Core works with Dropbox, Google Drive, and Amazon Web

