



Version 1.1.122 released on June 14, 2018

What's new in this version?

This update addressed some critical issues and added a few enhancements. Most notable:

- Record mapping section added to Core-MYOB Account Right integration.
 - Added a new global setting that enables users to send multiples attachments as a single file in zip file format.
 - Ability to preview invoices and other reports from the transaction tab in Projects.
 - Added a new OT filter in Reviewer.
 - Added "Phase Id-Phase Name" as a Project display option.
 - Group detail views had performance issues and did not implement progressive scrolling. This was fixed.
 - Statement module was not part of the Billing package. This was corrected.
 - Report and screen filters are now sorted alphabetically.
 - Added Google captcha validation at specific places in the application to enhance security.
 - Simplified the way application handles decimal precision for the amount fields. Now all amounts in Core would follow a fixed precision of 2 places of decimal.
 - Cloud feeds reports are now accessible from the Cloud feeds screen.
 - Custom fields would not appear on the concerned reports. This was corrected.
 - Bill payment screen was optimized for performance.
 - Retainer balances widget would not take retainer refunds into consideration. This was fixed.
 - Existing tasks when copied from a project would not inherit the task follows attribute. This was corrected.
 - Updated reports for performance and bug fixes.
 - Updated help content.
 - Numerous other bug fixes and optimizations.
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Version 1.1.121 released on June 1, 2018

What's new in this version?

This update addressed some critical issues esp. related to performance. Most notable:

- **Faster, leaner Time Card:** Core Time Card has been re-designed from scratch to allow for faster performance and Ajax based save. The app no longer imposes any limit on the number of time entries that can be shown per week and uses a combination of Ajax and progressive scroll to provide the best user experience.
- **Optimized batch change** feature for Project, Client and Time and expense entry for performance. Also, Update rates and Project clone features were tweaked to improve performance.
- Creating a time entry from a timer would take longer than expected. This was fixed.
- Adding a new activity would take a long time if the activity list had over 200 entries. This was fixed.
- Deleting existing deposit entries would take a long time if the action was performed for a batch of entries. This was fixed.
- Added a new batch action to download documents.
- Project structure tab in Project detail view was not calculating some parent level numbers correctly. This was corrected.
- Paid filter in vendor bills would not work as expected and would fail to reflect bills that were fully or partially settled using vendor credits. This was fixed.
- An issue with un-assign feature in budgets and estimates was causing the affected projects to also get reset for the assigned fee schedule. This was fixed.
- Core now remembers the show info bar setting in project, client and other lists.
- Core would send subscription notifications to all owner and admin accounts set for the company. This was changed to only send notification to the owner account.
- Certain scheduled reports would fail to run if processed directly from Core. This was fixed.
- Budget details would sort the line items erratically after a new line item was added. This was corrected.
- Fee schedules rates for expense codes were not being respected when update rates action was performed from the time and expense reviewer. This was corrected.
- Users with billing subscription were not able to access purchase order module. This was fixed.
- Time and expense entries that were approved for Payroll only were being un-necessarily locked when the project was processed in batch invoicing. This was fixed.
- Invoice number filter would show repeat the numbers for joint invoices. This was fixed.
- Retainer list would not show the list if a client or a project was selected in the filter dropdown. This was fixed.
- A recent change had caused the payment disbursement feature to fail. This was corrected.
- Some users were facing issues with creating batch invoices for projects that had entries with multiple workflow types. This was fixed.
- QBO sync would incorrectly create retainer payments for payments that were brought over and did not have the underlying invoice in Core. This was fixed.
- Documents widget would not allow users to download the documents and would fail. This was fixed.

- Users with restricted security for approving invoices were able to approve invoices. This was fixed.
 - Parent entry in General Journal would not be shown as the first entry in the General Journal detail view after a sort was performed. This was corrected.
 - Users were able to email Purchase order and vendor bill reports even if they did not have the appropriate security. This was fixed.
 - Expense entry cost was being reset to zero if the user changed the project or expense id. This was fixed.
 - A recent change had caused the custom fields to fail update. This was fixed.
 - Numerous other bug fixes and optimizations.
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Version 1.1.120 released on May 25, 2018 (Hot Fix)

- Project, Transaction tab would fail to show more than 25 records. This was fixed.
 - Project structure, Balance column was not excluding the extra amount. This was corrected.
 - Get invoices from QuickBooks was not able to handle a very large list of invoices and would time out. This was fixed.
 - Existing time entries could not be assigned to a Joint invoice from the Time Entry, batch change screen. This was fixed.
 - Automatic billing would fail to inherit the billing memo when the invoice was processed. This was corrected.
 - Expense by vendor report would not work with account filters. This was fixed.
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Version 1.1.119 released on May 23, 2018 (Hot fix)

- Amount applied field in Create new payment was being auto filled with a value when a user scrolled the list of invoices while creating a new AR payment. This was fixed.
- Time card reports would show data outside the designated filters when launched from the Time card screen. This was fixed.
- Create new payment screen would un-necessarily show paid invoices along with the un-paid invoices. This was corrected.
- Create new payment screen was missing certain column headers. This was corrected.

Version 1.1.118 released on May 21, 2018

What's new in this version?

This update addressed some performance and other issues. Most notable:

- Manage priority screen in fee schedules, service and expense detail view would only allow users to manage the first 25 rows. This was fixed.
- Employee control, add project would fail to show all the phases if they exceeded a certain number. This was corrected.
- Assigning fee schedule to projects would restrict the list to top 25 records. This was fixed.
- Bill number dropdown in create new bill payment was not optimized to handle a large list of vendor bills. This was fixed.
- Create new bill payment was optimized to handle a large set of payments.
- Create new check would get un-responsive if a large list of existing reimbursable charges was imported. This was fixed.
- Process automatic/memorized billing on user login was optimized for performance.
- Recipient dialog in report scheduling would not show the associated email address. Also, contacts that did not have a valid email address associated to them would also show up. Both these issues were fixed.
- Users were not allowed to add payments to projects that were marked as completed. This was fixed.
- Emailing a joint invoice to a client would un-necessarily add the client email address multiple times in the "To" field of the email compose screen. This was fixed.
- Global search had stopped working due to a recent code change. This was fixed.
- QuickBooks record mapping would not work as expected if one or more synced records were deleted in QuickBooks. This was fixed.
- Update rates in Reviewer would in-correctly set expense rates to zero if the associated expense record did not have a valid cost rate. This was fixed.
- Users were able to modify existing entries in vendor credit even if their date would fall before the closing date of the company. This was corrected.
- Time or expense entries that were excluded from billing in "create new batch invoice" screen would stay locked even after billing was completed. This was fixed.
- Users were able to modify their Core login (email address) in User profile screen. This was fixed.
- Users were not able to create allocations from a budget if the budget did not have at least one service line. This was corrected.
- Numerous other bug fixes and performance improvements.

Version 1.1.117 released on May 4, 2018

What's new?

Introducing integration with popular cloud storage services- Box and OneDrive: Core users can now integrate with the popular cloud storage providers, Box and OneDrive to store and manage documents.

This update also offered few other enhancements and fixes. Most notable:

- Core users who use QuickBooks integration can now set up account and tax codes at the project and Project group level.
- Core now aggregates help content from multiple sources, to provide quick and easy to find help topics.
- A brand new Cost plus Contract rates report that calculates indirect rates based on cost pools for Cost plus contract type.
- Added Parent project column to QBO project mappings.
- Several users had reported issues related to filters across many Core lists. This was fixed.
- Numerous other bug fixes and performance improvements,

Version 1.1.116 released on April 27, 2018

What's new in this version?

- Core reports can now be filtered by groups.
- Core invoice templates can now be set up to show client retainer summary information.

- Added Project manager/Parent Project filter to all project reports.
 - Report performance optimizations across numerous reports. The most notable are Balance sheet, Profit and loss, Trial balance and Check details reports.
 - The country field on account sign up and create company now defaults to United States.
 - Added few important reports:
 - Cloud feeds
 - Connected banks.
 - Ability to sort General Journal details view by any visible column.
 - The overdue column in invoices would not show the correct value. This was corrected.
 - Time and expense details in Create new vendor bill can now be sorted by all visible columns.
 - Some users had issues with filters in Dashboard widgets. This was fixed.
 - Profit profitability widget in project performance view had an issue and would not show any data. This was corrected.
 - Scheduled reports were missing filter information. This was corrected.
 - Project groups filter was not working as expected in the create batch invoices screen. This was fixed.
 - COA info bar would not refresh when a quick search was issued. This was fixed.
 - Numerous other bug fixes and performance optimizations.
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Version 1.1.115 released on April 14, 2018

What's new in this version?

- Create batch invoices screen now supports discrete filters. Users can choose individual projects, managers, clients or groups to generate invoices based on approved WIP, recurring frequency or billing schedules. Previously, the filter options were limited to ranges only.
- Added line number re-ordering in create manual invoice screen.
- Added the ability for invoices to show Tax Id the in invoice header section. Australia/NZ would see this field appear as ABN #.
- Allow users to specify times of the day in military format. This applies to start and stop times in time entry and calendar events and this option is provided as user preference.
- Added a brand new global setting to specify the default discount account
- Cost pool list now supports re-ordering of existing cost pools.
- Users can now specify the class field while creating a new deposit.
- Manual invoices line items that are inherited from budgets and estimates are now sorted by activity/expense code.

- Core was not able email invoices that had attachments over a certain size. This was fixed.
 - A period character in the invoice number was causing the invoice list to not load properly. This was fixed.
 - Check printing screen would use the employee “display as” instead of the employee name (or company name for vendor). This was fixed.
 - Vendor transaction history would just show checks that were used to pay bills for the vendor and skip checks that were directly cut for the vendor. This was fixed.
 - Project dropdown in create checks and credit cards would bring all items and not respect the project assignments. This was fixed.
 - Project performance widget now rolls up by parent project.
 - Users were not able enter employee birth dates for any date before 1970. This was corrected.
 - Bug fixing and stability.
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Version 1.1.114 released on April 6, 2018

What’s new in this version?

- Implemented Get all and Send all for AccountRight integration.
- Invoice list in create new payments is now sortable by all columns.
- Added the following new reports
 - Payment Receipt
 - Credit Payment Receipt
 - Refund Retainer Receipt
 - Project Account Details
- Added new filters to few important Core reports.
- Expense entries marked as paid would still appear in create new vendor bill screen if the user chose to select from existing time and expense for the vendor. This was fixed.
- Draft invoices were being incorrectly marked as posted when emailed. This was corrected.
- COA screen info bar was not looking at provided filters. This was fixed.
- Quick payment for an existing invoice would open the payment screen even though the user was not permitted to create a new payment. This was fixed.
- COA screen had issues when sorting by the account number field when the account numbers was pure numeric. This was fixed.
- A user scenario was causing the print checks module to repeat check numbers. This was corrected.
- A manual invoice being created out of an estimate would lose the sort ordering if it was saved as draft. This was corrected.
- Descriptive text for some reminder and notification settings were re-phrased to describe the settings correctly.
- Bug fixing and stability.

Version 1.1.113 released on April 2, 2018 (Hot fix)

What's new in this version?

This update addressed some urgent issues reported by Core customers. Most notably:

- Time and expense details view in billing screens were being restricted to users that had a time and expense subscription and not just the required billing subscription. This was fixed and now a billing subscription automatically allows users to view and edit specific attributes of entries linked to invoices.
- Check printing screen would skip the trailing zeros in the amount field of a check. This was fixed.
- Users were being restricted to reconcile only 25 items at a time. This was fixed.
- Timer list would show timers belonging to other users even though the logged user had not initiated them. This was fixed.
- Custom fields and lists were not available to time and expense users in time and expense entry. This was fixed.
- Users were not able delete invoices for certain projects that had custom invoice numbering turned on but the optional fields, suffix or prefix, were not provided any value. This was corrected.

Version 1.1.112 released on March 21, 2018

What's new in this version?

Introducing Xero Integration: Core now integrates with the popular accounting software, Xero. Core users can sync employees, clients, vendors. Invoices, payments, purchase orders, vendor bills, accounts, activity and expense items between the two applications.

This update also added over 40 notable enhancements to the application apart from fixing numerous known issues. Some enhancements and fixes that are worth mentioning are:

- An improved algorithm to process projects that are due for billing in the batch invoice screen. Core now imposes no restrictions on the number of projects that can show up in this list and projects are progressively retrieved upon list scroll.
- Users can now create automatic time entries for approved PTO requests.
- Core now allows users with the appropriate permissions to create timers for employees other than logged user.
- A brand new info bar was added to the Invoice Collection screen.
- Invoice module now supports Custom fields.
- Users can now specify the class field while creating a bank feed rule.
- Added several security enhancements including temporary account lockout for several login attempts with an incorrect password.
- Updated Invoice templates options in Global Settings. Added show hours/amount, separate grouping field for expenses and other options under Layout section.
- Core now allows users to clone a project across multiple clients in one go when using the clone function from project list view.
- Core now automatically persists the order in which the General Journal line items were entered. This order is also maintained for GJ entries that are cloned from an original entry.
- We added two more important columns to the Project structure tab, “contract billed” and “extra billed” to give managers insights into the breakup of billing for the project or its phases.
- Batch invoice users can now separate individual phases that have been combined for Joint invoice purpose in the batch invoice screen.
- Core now allows users to set up customized file names for invoice, statement and reports that are sent as email attachments.
- Added the popular ‘Due upon Receipt’ payment term.
- Implemented a refined algorithm to prevent unnecessary time and expense entry locks during batch invoice processing.
- Employee control list now provides a tristate checkbox to indicate if control is partially turned on, turned on or completely off for an employee.
- Users can now sort on date and amount columns in the Accounts Reconciliations screen to save time when reconciling accounts
- A brand new action in user preference section to clear out all screen filters for the logged user.
- We had incorrectly tied the “Message on Invoice” field to an unrelated project rule and this field would not show up on invoices unless that rule was checked. This was fixed.
- Vendor screen KPIs’ would exclude checks that included the vendor AP account as a detail item. This was corrected.
- Added “Charge Amount” as an optional column in the time entries and reviewer screen.
- Added “Comp” field as a batch update field for time entries.
- Core users with high resolution display would at times face scrolling issues for Core lists to retrieve additional records. This was fixed was providing a “More” button at the end of list.
- Core now allows users to change security templates from the Employee detail view.
- Users can now enter currency amounts for some percentage fields and Core would automatically calculate the corresponding percentage. This feature was added in Expense entry and create batch invoice screen.
- Core transactions created from cloud feeds now inherit ref. field from the bank/credit card feed.
- Custom label and mask management screen under Global settings now provides elaborative tooltips by exemplifying how these settings work.

- There was no detail view in Core for retainer invoices. Users can now view the detail of an existing retainer by clicking on the “detail” row action.
- Added “Core account balance” as a column in the Cloud Feeds list.
- Popular date shortcuts like This Week, This Month, etc. were missing in the reports screen. These were added.
- Admin users can now set up security to control which users has access to check printing function.
- There was no option to assign a group of attendees to an event. This new option was added in the Calendar screen.
- Custom fields’ management screen now allows user to create a new custom field from an existing custom field.
- Added Classification column as an optional column to Time Entries screen.
- A main project with no phases available for time or expense entry for the contextual user would show up in the drop down. This was corrected.
- Added the following brand new reports
 - Top Ten in Revenue
 - Employee Time Card Half Monthly
 - Enhanced the 1099-MISC report to also show 1096 form
 - Fixed Invoice (% Complete) invoice template
 - Trial Balance YTD Accrual/Cash
 - Tax Registry
 - Credit Memo Receipt
- ‘Show GST separately on invoices’ rule in Global Settings was renamed to ‘Show combined GST on invoices’ and is checked automatically for AU, NZ and Canadian companies.
- Time and expense entry lists “submitted by” column was renamed to “last action by” to reflect the correct behavior of this field.
- The Balance filter in Statement screen was made more usable by including options like <, >, = to give users more flexibility to enter approximate values and not necessarily exact values for filtering data.
- Searching for phases in projects list would cause the project list to repeat phases. This was fixed.
- Report scheduling would fail to deliver reports on scheduled intervals if the schedule or any of its underlying reports were updated for filters or any options. This was fixed.
- There was a problem with accented characters display in Core. This was fixed.
- Global Settings > Accounting: Income Account for Services/Expenses was renamed to Income Account for Services/Expenses without Line Item.
- Account reconciliation screen would list “CreatedOn” date as the transaction date for some accounting entries. This was corrected.
- Time recorded against vendors in vendor bills would show up in the Hours widget. This was fixed.
- The application allowed users to enable the auto-renew option for multi-year plans. This was corrected.
- Removed the redundant date filter in filters panel in Invoice list and General Journal list.
- Tasks assigned to an employee were not automatically removed when the employee was deleted. This was fixed.
- Users were not able to update existing time entries for a project with ‘Prevent Time Entry’ rule set. This was fixed to allow users to update existing entries.

- Core would incorrectly set all existing time entries as non- billable when a project contract type was changed to Marketing or overhead. This was corrected and all contextual rules are respected while making this change.
 - Payments were not auto-posting the invoices. Applying a payment to an invoice is supposed to flag the paid invoice as posted. This was fixed.
 - Project structure spent column (and other places) did not reflect the correct value for spent time and expense until these entries were billed. This was fixed.
 - Core would not automatically recycle an Invoice number if the associated invoice was deleted. This was fixed.
 - Core invoice template would refer to activity description instead to time entry description. This was corrected.
 - Changing the charge amount of a time entry didn't apply the corresponding WUD to the time entry. This was fixed.
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Version 1.1.84 released on March 11, 2018 (Hot fix)

What's new in this version?

Introducing Gantt Charts: Core now offers a fully featured Gantt chart that makes project/resource scheduling all the more powerful yet intuitive and easy to use.

This update also addressed some urgent issues reported by Core customers.

- Creating a new estimate from an existing estimate did not copy the custom fields associated with the service and expense line items. This was fixed.
 - An issue in the code would reset user company logo on application updates. This was fixed
 - An issue in the memorized reports module would prevent users from accessing certain reports. This was corrected.
 - Updating a custom label would cause custom reports to disappear from the reports screen. This was fixed.
 - An issue in assign fee schedule dialog would falsely indicate a project was selected and confuse the user. This was fixed.
 - Batch invoice screen would fail to process an invoice if invoice percent complete was modified. This happened for companies on euro currency. This was fixed.
 - Invoice collection screen would not allow users to add quick notes to invoices that appeared after the first scroll. This was fixed.
 - Account filter in reports was not working as expected. This was fixed.
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Version 1.1.82 released on March 2, 2018 (Hot fix)

What's new in this version?

This update addressed some urgent issues reported by Core customers.

- Users were not able to update an employee record, if the default group associated to the employee had been deleted. This was fixed.
 - Memorized reports were being incorrectly marked as private, if a user other the original owner of the report, customized any filters or any other options. This was fixed.
 - A report marked as favorite would disappear from the favorite tab upon preview. This was fixed.
 - In certain scenarios, payment date for a new payment would default to the previous day. This was fixed.
 - Core payment screen would not restrict users from applying a retainer payment when the net retainer balance was in negative. This was fixed.
 - Project batch update would clear any billing contacts for projects. This was fixed.
 - Core would incorrectly set the payment date to current date instead of the user specified date when creating a project balance brought forward invoice. This was fixed.
 - Merge project would fail in scenarios where the source project Id exceeded a certain length. This was fixed.
 - Users were not able to enter reimbursable expenses if they did not have permissions for the vendor bill module. This was fixed.
 - Project template detail view would not open and cause a UI crash. This was fixed.
 - Users were not able to associate a cloud feed to multiple Core transactions even though the amounts would exactly match. This was fixed.
 - Users without the necessary permission were able to delete submitted/ approved time entries. This was fixed.
 - Fee schedule list would not show more than 25 records. This was corrected.
 - Core would incorrectly update time entry bill rates to zero if the associated project fee schedule had zero rate defined for cost rates. This was fixed.
 - A filter issue in payments was preventing some users from viewing all payments. This was corrected.
 - QBO sync would not work for time entry sync if the setting "skip vendor time" was checked. This was corrected.
 - QBO mapping module would show Core retainer invoices in unmapped invoices section. This was fixed.
 - Invoices that were emailed from the invoice list would not respect settings related to hide non-billable charges. This was fixed.
 - Voided checks would appear on the AP aging report. This was fixed.
 - Phased invoice templates were not showing the correct phase description. This was corrected.
 - Aging report was not excluding vendor bills that were fully paid. This was corrected.
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Version 1.1.81 released on February 16, 2018 (Hot fix)

What's new in this version?

This update aimed to address some urgent issues reported by Core customers.

- Create batch invoices screen would fail to retrieve all projects that were due for billing. This was fixed.
 - Time and expense entries associated to a vendor were being incorrectly updated to the current date when they were auto-imported in create vendor bill screen. This was corrected.
 - Spent column in project status widget and project structure tab was using an incorrect formula. This was fixed.
 - Users on accounting subscription were not able to assign groups to a vendor or an employee. This was fixed.
 - Email message defined in global settings/user preferences would incorrectly display HTML tags while composing an email for retainer invoice. This was fixed.
 - Time and expense entry memos that were originally copied from MS Excel/MS Word would cause issues in Time entry, Expense entry, and Reviewer and Time card screens. This was corrected.
 - Added "reimbursable" column to Reviewer.
 - Check printing would misspell amounts with decimals. This was fixed.
 - Some Core users had reported that certain parent projects were incorrectly showing up at the end of the hierarchy when selecting projects in time and expense entry project dropdowns. This was fixed.
 - QBO jobs with malformed geo-location information would not import to Core. This was fixed.
 - A General Journal entry would fail to save if it took the user longer than 20 minutes to save it. This was fixed.
 - Payment screen would not allow users to create a credit type payment and mark it as a retainer. This was fixed.
 - A time entry that had a trailing space in the memo field would transfer to QBO with unnecessary HTML tags. This was corrected.
 - Users were having issues with updating custom LEDES mappings. This was fixed.
 - Certain bill payments would not show up in bill payments list as the void flag was incorrectly set to null. This was corrected.
 - There was a severe performance issue while updating a vendor bill that had over 50 line items. This was fixed.
 - Active status filters in Group details view were not working as expected. This was fixed.
 - Bill payment list would not show the correct Reference (ref) field value. This was fixed.
 - Added default values to all Boolean and small integer fields in the Core user database.
 - Other fixes including reports.
 - (internal) Admin portal would fail to download large database backups. This was corrected.
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Version 1.1.79 released on January 19, 2018 (Hot fix)

What's new in this version?

This update addressed some urgent issues reported by Core customers.

- Project assignments based on activity groups would not work as intended when the logged user had security rule, "Use Project assignment on top of Employee control" checked. This was fixed.
- Bill payment screen now implements progressive scrolling to handle large bill payment lists.
- Modifying % complete for phases of a project in batch invoices was writing up one of the time entries linked to a random phase that is part of the invoice. This would happen if the one or more phases had no time or expense. This was fixed.
- QBO invoices for inactive clients were being associated with incorrect projects in Core. This was fixed.
- Core would wrongly create employees with the same name as QBO customers when getting vendor bills from QBO. This was fixed.
- Sync setting for QBO would save the previous day's date for Invoice GET section. This was fixed.
- Un-mapped records in QBO list would not show up in a certain scenario. This was fixed.
- User with full permission to fee schedule module was not able to delete schedules. This was fixed.
- A certain filter scenario would prevent time or expense to show up for a user with full permissions to the reviewer screen. This was fixed.
- Forecasting screen would keep showing the loading indicator if there were no records in the forecasting range. This was fixed.
- Some employee reimbursable would not show up in check screen. This was an issue in the sample files and is fixed now.
- Check alignment screen background would appear distorted on Safari on Mac. This was fixed.
- Recently added custom fields filter feature would not work as expected if the custom filter name matched any of the system filters. This was fixed.
- Allocation would not show up correctly, if an employee was part of more than one allocation and was allocated as an employee group and as an individual employee. This was fixed.
- Creating new project would fail if the company had turned on auto-increment project id and the next project id had a specific number of characters. This was fixed.
- Merge project function would reset the project sort order. This was fixed.
- Phase sort order was not being followed in budget, estimate and fee schedule. This was fixed.
- A project with existing assignments could not be deleted. This was fixed.
- Some core reports were not respecting hide cost rates security. This was fixed.
- Core invoices would incorrectly show activity description instead of time entry description. This was fixed.
- Manual invoice would repeat the item description. This was fixed.
- Bill number filter would not work for bill payments report. This was fixed.
- Report, Misc1099 did not obey Company profile fed-id masking. This was fixed.

- Vendor tax id number and company phone no - masking was not being implemented on MISC-1099 Report. This was fixed.
 - Manual invoice had an issue related to summary total. This was fixed.
 - The Hourly recurring invoice would not show the expenses if they were part of an invoice. This was fixed.
 - Joint invoice template was leaving a blank line between entries. This was fixed.
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Version 1.1.78 released on January 13, 2018

What's new in this version?

- **Check alignment for precise check printing:** Core now allows users to customize system check templates to meet their precise check printing needs. Users can align all data driven fields for standard, wallet and voucher check styles as per the check stationary available to them.
- **Filter by Custom fields:** Users can now filter Core lists by custom fields. This useful feature further augments the power of custom fields in Core.
- **In-line editing for Task allocation forecasting:** Users would now be able to edit the allocation distributions in the Manual view forecasting screen. This brand new view not only allows user to provide distributions for existing tasks but users can create new tasks by simply providing units for any calendar day.

This release has over 300 other improvements. Some of the notable highlights.

- Users can associate reimbursable expenses to a check if the payee is an employee and has expenses that have not been paid yet.
- Users can now initiate an invoice payment directly from the invoice list.
- Parent project Documents, To-dos and Notes tab now show all entries rolled up to display all items linked to their phases.
- Invoice list now displays all phases that are part of the invoice as a tooltip.
- Budgets and estimates can now be emailed right from the list screens.
- All Core invoices now handle project level currency multipliers.
- Record mapping views in QBO integration can now be sorted by all available columns.
- Added new filters to Statements screen.
- Invoice list now allow batch change for invoice dates.
- Users are now prompted if they want to update phases of a project, if any tax or currency information is changed for the parent project.

- Added bill number column to expense entry and time entry.
- Added new date shortcut filters in the reports area.
- Added balance as a grand total for all Core registers.
- Implemented GST for Australia subscriptions.
- Time card would now handle up to 100 project/activity combinations. This was increased from the earlier limit of 50.
- While cloning a project or when a project was created from a template, assignment tied to the project/template were being dropped. This was fixed.
- Employee control would not work as expected and would associate a group to all employees even though it was intended for one employee. This was fixed.
- Time and expense users were not able to view or edit a To-do that was assigned to them. This was fixed.
- Editing time entry hours would not work as expected in batch invoicing if the rule "memo is required" was turned on for the project. This was fixed.
- Project status widget red flag tooltip would show incorrect information in certain scenarios. This was fixed.
- Projects are now shown as a tooltip in Time and expense entry.
- An un-necessary security restriction was preventing users from accessing Client and Project screens even though they had full access to these modules. This was fixed.
- Retainer lists screen would only reflect the total for the first 25 entries. This was fixed.
- Core phased invoice would incorrectly drop some phases on preview. This was fixed.
- Core phased invoice would show incorrect invoice summary. This was fixed.
- If a bill payment was voided, bills associated to the voided payment would fail to appear in the bill payment module. This was fixed.
- A scenario caused the project 'display as' to be reset if the project record was modified. This was fixed.
- A scenario would cause the time card to show no data on column sort. This was fixed.
- Previewing retainer Invoice shows company label instead of actual company name when creating a Client or Project retainer invoice in Billing>Retainers module. This was fixed.
- When saving a record, formatting for some fields would be reset. This was fixed.
- Invoice totals were incorrect when using the "Hourly Invoice by Title" template. This was fixed.
- Payment screen would not update the available amount when disbursing retainers. This was fixed.
- PTO InfoBar did not respect user permissions. This was fixed.
- Core account registers now sort chronologically.
- Core would allow users to delete Income and expense accounts that were linked with time entries. This was fixed.
- User entered statement balance would not get reflected in Accounting reconciliation screen. This was fixed.
- Work in hand report would show up draft Invoices as well. This was fixed.
- Project Retainer method payment was not reflected in Client transaction screen. This was fixed.
- Expense entry memo would not display and time entry memo did not follow "Show memo on Invoices" rule. This was fixed.
- Ajax was not working on the Accounts payable field of the Add Vendor bill screen. This was fixed.

- Core item based transaction created from a bank feed would not prompt the user to enter a memo even if memo was required for the project. This was fixed.
 - Core email screen would not accept multiple emails in the CC field. This was fixed.
 - Allocation and forecasting screen would display a blank page if a user clicked on allocated hours/units notification item.
 - Updating % complete in Estimate, service and expense detail would error out. This was fixed.
 - Purchase order line ordering would not be persisted after updating a detail item. This was fixed.
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Version 1.1.61 released on December 15, 2017

What's new in this version?

- **Introducing Core-QBO Record Mapping:** QuickBooks integration just got stronger with a comprehensive record mappings module. Users can view all matched and un-matched records and create or delete associations on the fly.
- **Sample Invoice Preview:** Core now offers users an instant preview of the invoice template while they are assigning project invoice templates or setting up them up in global settings. This feature has also been made available in the invoice template management area.
- **Introducing LEDES Export:** Core now offers legal industry users, the ability to export invoices to the popular LEDES format. Users can set up simple and advanced global rules to support their choice of export.
- **The power of custom reports:** Core now supports custom designed report templates for customers who wish to use our report customization services. Please contact BQE Support to get started.

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

- A new action in invoices list allows users to change the preview template on the fly. User can also mark this change permanent and update the project template setting.
- There was a performance issue in Project dropdowns for Core users with large project lists. This was fixed

- Processing batch invoices using Project group filter would create duplicate invoices if the project was part of multiple groups and group filters were used during invoice processing. This was fixed
- Fixed progressive scrolling issues for the following screens: To-do, Statements, Credit Card, Documents, Purchase Order, Notes, Deposits, Checks, Timer, Vendor time and expense,
- Added memo field to Time and Expense reviewer.
- Added more filters to Project status and other dashboard widgets
- Optimized QuickBooks sync to avoid any time outs during the sync process
- Users were having trouble ascertaining if a menu had more items below the fold. This was fixed by increasing the width of the scroll bar.
- Rebuild accounting received a performance boost and the process completes significantly faster than earlier.
- An enhancement in assignments area will now allow users to copy project assignments or employee control to other projects/employees or a group.
- Core users will now be able to preview allocation and spent reports from the Allocation module.
- Company admin users can upgrade subscription plans at any time.
- Users are now shown the custom date range that is being applied in Core transaction lists like invoices, payment, time entry etc.
- An issue in the subscriptions module was creating incorrect invoice totals and line items on purchase/renewal of Core subscriptions. This was corrected
- Core would compute client hours to zero if the minimum time increment was set to 1 minute. This was corrected
- Moving Calendar events around would not add them to the intended date for Australia region companies. This was fixed.
- Creating two reimbursable expenses for the same employee on same dates would incorrectly display "duplicate bill number" prompt. This has been corrected.
- Assign Project in Fee schedules now allows user to select from a hierarchical project list.
- Project structure sort order was not being followed in project list and drop downs. This was fixed
- QuickBooks sync progress bars would show incorrect progress at times. This was corrected.
- Added a memo field for time and expense details in Batch invoicing.
- Project active status filter would not fetch phases that were set to inactive. This was fixed.
- Added entity (Id) field to To-dos', Notes and documents list.
- Users can now initiate a renewal for subscriptions that have expired in the past and were not renewed.
- Core now prompts users for size recommendations on specific Dashboard widgets.
- Added the ability to sort in Project and Client transactions list.
- There was no way to go back to the main report unless you close and re-run the report once user drill down the report. It is fixed now.
- Importing "Items Received" from a Purchase Order in the Add Vendor Bill Screen would not fetch the memo. This was corrected.
- All Core report templates now honor company country specific settings.
- Time Card screen would sometimes incorrectly apply period filter. It is corrected now
- Users are now allowed to set negative minimum amount as minimum bill amount during processing of batch invoices.
- There were instances when creating new group would prompt the user with a "duplicate group" error. This was fixed.

- Vendor and Outside Consultant type Vendors were showing up in the Staff Utilization Widget. These were fixed.
- There was an issue related to Fee schedule screen when using Safari browser. This was fixed.
- An existing Credit Card entry would disappear in Credit Card Register when we change the project account for expense account. It is fixed now
- Under some scenarios, Service amount would be stored as zero in Estimate screen. It is fixed now.
- Contract Analysis report would incorrectly exclude totals for phased projects. It has been resolved now.
- Added cover sheet option for Hourly invoice templates.
- Fixed an issue with some report templates that would show un-necessary header information on .csv export.
- "Restrict Time/ Expense entry to Budgeted activities/expense or Employees" rule was being applied in Allocations tasks module. This was corrected.
- Custom fields would show up for limited access users in Time and expense entry. This was fixed.
- Implemented report security in context driven reports.
- Removing a project contact would incorrectly delete from the Client contacts also. This was fixed.
- "Show Ignored" dropdown would not display all transactions when "Last Quarter" filter was applied in Bank feed
- There were issues related to sorting in COA list. These were fixed.
- Processing draft invoices to final would not update the last invoice number. This was fixed.

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
- Somme 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 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