



## 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 throw 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