VERSION 1.1.213 RELEASED ON MARCH 8, 2024

Release Spotlight

We've made it easier to add and manage recent activities to your Time Card! There are two new controls:

- **Load more recent activities** button makes it fast to find the activity you need. Clicking the button adds 10 activities which most recently had time entered on them.
- **Hide empty rows** toggle makes it easy to see the activities which have time entries in the period.

This feature was built based on customer feedback on the recent activities changes we made in November. We welcome your comments at CORE-ideas@bqe.com.

Product Enhancements

Improved filtering on Opportunities

CRM Customers can better track Opportunities with new Closed on and Created on Date filters from the top of the Opportunities list.

Enhanced To-Do widget on Dashboards

We've made it easier to find your To-Dos and access key information in the To-Do widget with three key changes:

1. Improved filters – new Project filter; % Complete filter now supports a range filter; and Any Date is now available on the Due Date filter.
2. Added links directly to the object the To-Do is related to (e.g. Project).
3. Overdue To-Dos are highlighted in red.

Employee List report enhancement

The Employee List report now has a Release Date column which allows you to track when an employee left your firm.

Invoice template configuration

We've added a new Sort By invoice template configuration for the Hourly Invoice by Title template. You can now choose to sort by Title or Bill Rate.

New setting for handling reimbursable expenses

Customers with Accounting subscriptions can now opt to mark reimbursable expenses as paid without a bill payment using a new setting. Find the setting under Settings > Time & Expense > Expense Entry.

Improved reconciliation when a transaction is deleted

The Beginning Balance of a reconciliation now reflects transactions that were deleted after they were reconciled. Previously these transactions were not handled properly, causing extra steps to re-balance prior reconciliations.

Application Stability:

This update fixes many issues reported by our users. Key fixes are listed below and are organized by module:

- Accounting
  - Some customers were encountering an incorrect "page refreshed" error when completing reconciliations. This is fixed.
  - The font used when printing checks was too light, making it hard to read on the page. The font is now heavier.
  - A rounding issue could cause a reconciliation to show as out of balance when it was not. This is fixed.
- Billing
  - In certain scenarios, custom invoice templates could become unassigned. This is fixed.
  - When emailing retainer invoices, invoice number and invoice date smart fields were being ignored. This is fixed.
  - We added a validation to require Manual Invoices to have a From and To date to avoid unexpected time entries from appearing on the invoice.
  - The Invoice Item Tax accounts settings were being ignored. This is fixed.
- Contacts
  - Converting a Vendor to an Employee could fail for customers with very large data sets. This is fixed.
- CRM
  - Filters on the Opportunities list page would be lost when returning to the list from an Opportunity. This is fixed.

- ePayments
  - Canadian postal codes were not being handled properly in a specific instance on the Pay Now page. This is fixed.
  - The payment method options could appear twice in certain scenarios. This is fixed.
  - The list of other invoices to pay could show a client a list of invoices that were already paid. This is fixed.
  - Some fields in the ePayment Merchant Sign Up form were not being captured correctly. This is fixed.
- Integrations
  - Outlook 365 integration was being reset incorrectly after a period of days or weeks. This is fixed.
- Project
  - The alert which checks for unbilled time when setting project status to Completed now ignores non-billable time.
  - Activity or Expense Groups could not be assigned to Project Templates. This is fixed.
  - Forecast values were not editable in the Amounts view. This is fixed.
  - The project and activity values could show as undefined when a conflicting resource allocation was made. This is fixed.
  - The Budget page would fail to load if the project name or ID contained special characters. This is fixed.
  - Estimates could display incomplete information if sorting was applied in a certain way. This is fixed.
  - Users would encounter an error if cloning multiple Budget templates one right after the other. This is fixed.
  - Projects created from a template would display the wrong Created by user. This is fixed.
- Reports
  - The Master Project filter was not working properly on the Refund Retainer Receipt report. This is fixed.
- System
  - Customers could get a Bad Request pop up when logging in. This is fixed.

VERSION 1.1.212 RELEASED ON FEBRUARY 22, 2024

Release Spotlight

Welcome to the new Report Center! We've made it easier to find, configure, and run reports. Highlights:

- **Find the report your need, fast** with template previews, enhanced search, and a consolidated report template list
- **Simplified configuration** with an easier to use page, cloning reports, and a simple saving process.
- **Fewer clicks to run** with your saved reports front & center and one click rerunning reports.

Your existing memorized and favorite reports have been migrated to the Report Center automatically. We expect to retire the legacy report experience in April.

Product Enhancements

Upgraded Proposal Builder in CRM

Our latest update to the Proposal Builder is designed with your feedback in mind. We've revamped the formatting toolbar for easier text formatting, clarified subpoints and bullet points, and improved image manipulation.

New features include font highlighting, upper and lower case formatting, a clear formatting option, and heading formats. Additionally, you have more control over placement of Smart Fields, Quotes, and Images through a new copy/paste process. These enhancements aim to make your proposal-building experience smoother and more intuitive.

2023 updates to 1099 / 1096 tax forms

We've updated the formatting of the 1099 and 1096 tax forms to align with the 2023 tax year standards. This applies to all versions of the form.

Application Stability:

This update fixes many issues reported by our users. Key fixes are listed below and are organized by module:

- Billing

- o Editing % Complete in Draft Invoice could cause Net Bill to be miscalculated. This is fixed.
- CRM
  - o All Leads were not showing correcting in certain scenarios. This is fixed.
  - o Multiple issues with Proposal Builder were fixed with the upgrade this release related to spacing, indentation, text alignment, and inserting Quotes.
- Dashboards
  - o The Time Performance widget now has a filter on Employee Status to better align with the Employee Performance report.
  - o The Current Opportunities widget could throw an error when a certain number of rows were displayed. This is fixed.
- Employee
  - o Employee rates could not be updated in one scenario. This is fixed.
- Project
  - o Updates to the contract amount of a master project were not being applied to phases based on the % of Project value. This is fixed.
  - o The contract amount of a phase could get updated incorrectly when using 3rd tier phases. This is fixed.
  - o Taxes were not being pulled from the Client record when creating a new project. This is fixed.
- Public API
  - o We released an improvement to our proactive logging of Public API transactions to help our teams troubleshoot issues.
- Reports
  - o Payment Details report would return incorrect data if the Client filter was not applied. This is fixed.
  - o 1099 reports could display an error instead of the vendor tax ID. This is fixed.
  - o Vendor Bills were included on the Time and Expense Details report ignoring the Vendor Bills filter being set to no. This is fixed.
  - o A performance improvement was made to the Deposit report. The report will now return 20,000+ rows without returning an error.
- Time & Expense
  - o Removing rows from Time Card could cause an error. This is fixed.
  - o Adding row to the Time Card for a project would not work if that project was at the bottom of the list. This is fixed.
  - o Time Card monitoring reminders could not be hidden once triggered. Now when a user meets their hours, the reminder will disappear on their next log in.

- o The record saved confirmation would not appear in certain scenarios. This is fixed.
  - To-Dos
    - o The "Back to To-Dos" link would not return the user to the To-Do List. This is fixed.

VERSION 1.1.211 RELEASED ON FEBRUARY 8, 2024

Release Spotlight

Coming Soon – new Report Center!

We're excited to announce the upcoming release of our new Report Center! On February 22nd, we'll be upgrading your reports experience to make it easier to find, configure, and run reports. Highlights:

- **Find the report your need, fast** with template previews, enhanced search, and a consolidated report template list
- **Simplified configuration** with an easier to use page, cloning reports, and a simple saving process.
- **Fewer clicks to run** with your saved reports front & center and one click rerunning reports.

Your existing memorized and favorite reports will be migrated to the Report Center automatically. You'll have access to the legacy report pages for a few weeks following the release.

Product Enhancements

Unbilled T&E alert when marking a project Completed

When changing the status of a project or phase to Completed, CORE will alert you to any unbilled time or expense on the project. This helps avoid missing unbilled entries on Completed phases.

Improved Bill Payments detail view

We've enhanced the view details modal in Bill Payments by showing more relevant data and improved subtotals. This makes reviewing Bill Payments faster.

<u>Performance improvement on Invoices page</u>
We've improved the performance of the Invoices page by up to 60%.

<u>Enhanced hierarchy handling with QuickBooks Online integration</u>
You can now seamlessly process payments to QuickBooks Online using the "Send Joint Invoices as Single Invoice" and "Join at Parent Job" options together. The previous limitation was removed and payments will be directed to the parent project, ensuring an error-free and streamlined payment process.

Application Stability:

This update fixes many issues reported by our users. Key fixes are listed below and are organized by module:

- Accounting
  - Using the Check Date filter on the Checks page could cause the totals to be incorrect. This is fixed.
  - Errors could occur if Vendor Bill numbers exceeded a certain length. CORE will now prevent overly long numbers from being saved.
  - Long project names were not clearly shown on the Vendor Bills pages. This is fixed and the project name column is resizable.
  - The create Purchase Order modal has been simplified to remove redundant fields.
- Billing
  - Certain billing parameters could cause an invalid error to appear on Batch Invoice. This is fixed.
  - The Client name smart field would not display on Statements and Invoices for Client's with an apostrophe in their name. This is fixed.
  - File size limits when emailing invoice attachments was not considering the zipped size of the attachments. This is fixed.
  - The Tax Accounts defined on Settings > Accounting > Tax Accounts were not being used when creating invoices. This is fixed.
  - Time entries could display against the wrong project on Batch Invoice in one case. This is fixed.
- CRM
  - Opening an Opportunity from a Prospect would open the wrong tab on the Opportunity. This is fixed.
  - The Value of Won Opportunities KPI could show an incorrect currency symbol. This is fixed.
- Employees

- o Batch updating a custom date field in Employees could result in an error. This is fixed.
- ePayments
  - o Moving an invoice from Draft to Finalized would clear the ePayments setting on the invoice. This is fixed.
  - o Filters applied before sending a Statement to a client were not being applied in the ePayments portal. This is fixed.
  - o Customers using ePayments via Stripe could encounter an error with partial payments. This is fixed.
- HR
  - o Benefits could be incorrectly accrued due to rounding. This is fixed so accruals are accurate.
  - o Cloning Review Templates could cause the wrong template to be duplicated. This is fixed.
  - o Review Templates page could freeze when editing the Question Type. This is fixed.
- Project
  - o In some cases, Budget Templates would not show all activities included in the template. This is fixed.
  - o Saving the Allocation & Forecasting pages as Favorites in CORE was not working properly. This is fixed.
  - o Project IDs were being set inconsistently when creating projects from a template. This is fixed.
- Reports
  - o Balance Sheet by Class Accrual report could show a mismatch between Total Assets and Total Liabilities and Equity. This is fixed.
  - o AR Aging with Credit Payments report would not deduct retainer refunds from the Total Unused Credit amount when filtered by Project Manager. This is fixed.
  - o AP Aging with Credit report could be missing certain General Journal entries linked to the AP account. This is fixed.
  - o The Last Fiscal Year filter on various reports was not applying the correct dates. This is fixed.
- Settings
  - o Fee Schedule details could disappear in one scenario. This is fixed.
  - o Subscription expiration renewal notifications could show the wrong number of days remaining. This is fixed.
  - o The Default CORE View user setting would work inconsistently when set to open to the last screen visited. This is fixed.
- Time & Expense

- o Time Card would not auto-create "Tasks allocated to me" in certain cases. This is fixed.
- To-Dos
  - o The End Date could not be set for users in certain countries. This is fixed.

VERSION 1.1.210 RELEASED ON JANUARY 24, 2024

Product Enhancements

Easy to access subscription expiration reminders
It's now easier to avoid disruptions to your company thanks to improved subscription alerts in CORE. As your subscription approaches expiration, Owners and Administrators on your account will be notified of expiration via a banner at the top of their CORE page. Click to Renew to quickly see the state of your subscription or dismiss the banner to be reminded later.

Improved memo formatting on invoices
Invoice memos now have a clear formatting option. This allows you to quickly reformat an invoice memo copied from another application right from CORE.

Enhanced Time Entry workflow
You can now reject time card entries with fewer steps! Previously, entries in Approved or Un-Approved status had to be marked Submitted before they were rejected. Now these entries can be marked Rejected in one click.

Separately, you can now control whether to use separate approval workflows for Billing and Payroll using a new global setting. Most customers use a single Billing workflow, so by default the setting is off. Existing customers who use the Payroll workflow extensively have had the setting enabled with the release. You can find the setting under Settings > Time & Expenses > General.

Application Stability:

This update fixes many issues reported by our users. Key fixes are listed below and are organized by module:

- Accounting
  - Some customers could only print 3-5 checks at once without encountering an error where the print window would not appear. This is fixed.
- Billing
  - Using the Project Due Date and other filters on the Invoices and Invoice Collections screens could result in incorrect results. This is fixed.
  - Some users could encounter an error finalizing invoices from the Batch Invoice or Edit Invoice pages. These are fixed.
  - Recurring projects with frequency Half Yearly would not generate invoices correctly. This is fixed.
  - The Retainers page would return no results if the "All Dates" filter was used. This is fixed.
  - The batch invoice parameters page would not load if an unrelated error occurred. This is fixed.
  - Draft manual invoices could not be opened from a project. This is fixed.
- Company
  - The permission required to create an additional company has been made more restrictive. It was also renamed to "Allow create and update" to be more clear.
- Documents
  - The Documents page now enforces permissions from the record type. For example, a user with access to Documents and Projects can no longer see Expense Entry documents.
- Employees
  - There was slowness when saving changes to employee records. This is fixed.
- ePayments
  - ePayments could get stuck in an incorrect status due to an error. This is fixed.
- HR
  - PTO earned could show the wrong value because PTO benefits would not respect the tiers of Benefit Earning Rules. This is fixed.
  - The Period filter would not persist the user's selection on the Human Resources tab of the Employee profile. This is fixed.
- Integrations
  - Customers with a company set to CAD and a project in USD could encounter an error integrating with QuickBooks Online. This is fixed.
- Project
  - Project Template > Assignment > Activity Items would not display all records in some cases. This is fixed.

- Public API
  - Customers using webhooks could encounter delayed or missing webhooks. We have released a performance improvement and webhooks are 85% faster.
- Reports
  - The Project List report would incorrectly state the contract balance and percent complete for main projects. This is fixed.
  - In one scenario, the Project Information report would omit budget information. This is fixed.
  - The Billable Work History report would omit the project name and only show the project ID. This is fixed.
  - The Work in Progress Details report was including a late fee in the Contract Balance field. This was inconsistent with other reports. This is fixed.
  - The Project List report would display incorrect start date when grouping by master project and hiding phases. This is fixed.
  - The Project Allocation Units report could misstate the Actual Client Hours when overlapping employee groups were used. This is fixed.
  - The Aged WIP with AR report now has a Hide Phases parameter to give you control of what to show on the report.
  - The Security Template report had inconsistencies in displaying modules and in the security bits lists. These are fixed.
- System
  - Newly invited users could get an error upon invitation that "the resource was removed". This is fixed.
- Time & Expense
  - There were inconsistent permission checks when deleting records between Time Card and Time Entry. The checks are now consistent.
  - Updating Client Hours on T&E Reviewer could be slow. This is fixed.
  - CSV exports of T&E Reviewer page could show duplicate records. This is fixed.
  - Resizing columns in the Time Card could cause the table to be mis-formatted. This is fixed.

VERSION 1.1.209 RELEASED ON JANUARY 11, 2024

Release Spotlight

You can now use timers while offline in the BQE CORE mobile app! You can effortlessly track your time on the go, even without an internet connection. Create, pause, and delete timers seamlessly, ensuring uninterrupted productivity, accurate time tracking, and automatic synchronization when back online.

Take advantage of the new offline timers in the iOS and Android apps as well as the Timer Widgets on the mobile home screen.

Product Enhancements

Streamlined set up of Project Monitoring
Project monitoring now has an option to "roll up" phase and sub-phase amounts into the calculation. This makes monitoring easier to set up – most customers want to enable tracking of spent versus contract or budget once at the parent project and capture all the phase values.

You can still choose to monitor on a phase by phase basis by selecting to exclude child phases when configuring monitoring on the parent project. Find project monitoring under Project > General > Monitoring.

Auto logout – additional options
Auto logout now supports more time intervals to give you more flexibility for aligning to your security policies. You can now automatically log users out after up to 12 hours from Settings > Access & Permissions > Login Security.

Opportunities in CRM – enhanced batch update
You can now batch update additional Opportunity fields in the CRM module. The new fields are: Groups, Competition, and Next Step.

Improved Charge Amount tracking in Vendor Bills
You can now record the amount your client should pay you for an expense from Vendor Bills. The Charge Amount field has been added to the page. The Bill Rate field can still be used to enter the amount your client should page for a time entry.

New report – Employee Allocation Weekly Manual View

You can now access and schedule the Allocation Weekly Manual View report from the Report Center. This report was only available previously from the page itself.

The report provides a 10 week forecast of staff workload or revenue, offering insights crucial for efficient resource planning. View by Project or Employee and see scheduled and actual hours or amounts.

Application Stability:

This update fixes many issues reported by our users. Key fixes are listed below and are organized by module:

- Accounting
    - Cash Basis accounting could become incorrect when reimbursable bills were partially paid. This is fixed.
- Billing
    - Invoices with item tax could display the wrong total due to a rounding issue. This is fixed.
- CRM
    - Certain customers were getting errors loading the Opportunities page. This is fixed.
    - Exporting Opportunities to CSV was not respecting the page filters. This is fixed.
    - Marking an Opportunity as Won wouldn't update the page without a refresh. This is fixed.
- Documents
    - Standard filtering is now available on the Documents page in the new UI.
- ePayments
    - Already paid invoices could appear for clients in the "Ready to submit another payment?" section. This is fixed.
- HR
    - To reduce the number of clicks to configure a benefit, we've removed an "Show more" option from the Add/Edit Benefit screens.
- Project
    - Cost rates were visible to some users when they should not have been on the Budget page. This is fixed.
    - The available balance could be incorrect on the Structure tab of the project in some cases. This is fixed.
    - Users were encountering errors when marking Allocation & Forecasting pages as favorites. This is fixed.

- Reports
  - Employee Utilization report and Staff Utilization widget now work with the setting "Utilization Based on" set to "Standard Hours less deductions". The report and widget will use employee weekly hours if populated, or employee daily hours.
  - Profit & Loss report was mishandling expense entries when they were marked paid. This is fixed.
  - Time Card Week View report would incorrectly group lines that had the same project and activity, even if the description was different. This is fixed.
  - Profit & Loss Cash Basis report would inconsistently handle a Vendor Bill paid with a credit. This is fixed.
  - Project Time & Expense report would not show the correct number of decimal places for expense rate. This is fixed.
  - Filters were not being respected when running the Vendor Bill List report from the Vendor Bills page. This is fixed.
- Time & Expense
  - Time Card monitoring was not handling certain time entry statuses correctly. This is fixed.

VERSION 1.1.208 RELEASED ON DECEMBER 26, 2023

Release Spotlight

We've made it easier to get the most out of CORE with new standard, role-based Dashboards!

The dashboards provide insight into key areas of CORE allowing you to efficiently monitor your tasks and projects, boosting productivity and profitability. The dashboards cover:

Area	Content includes
Billing	Aged receivables, money owed, cash flow, retainer balances
CRM	Opportunities, prospects, sales funnel, sales performance
Financials	Balance sheet, profit & loss, Income vs expenses, cash flow
Project Management	Project status, utilization, workflows, to-dos, project allocation
Timekeeper	Time performance, task allocation, PTO & comp hours, to-dos

These dashboards have been added to your existing dashboards. Dashboards are assigned based on user role and subscription, respect individual permission settings, and can be configured or customized at any time.

We hope you enjoy your new dashboards!

Product Enhancements

Streamlined Opportunities in CRM
We've eliminated manual steps converting an Opportunity to a Project and batch updating Opportunities. Now, when an Opportunity is marked **Won**, the documents from the Opportunity can now be made available in the new Project.

Additionally, you can now batch update the Custom Fields and Loss columns of Opportunities.

Improved Collections report
We have revamped the Collection report with new features and an improved layout. You can now Group by key information like Client, Principal, or Project. Plus, the "Show/Hide Details" toggle allows you to further tailor the output to your needs.

Further Accounting Reconciliation improvements
We've made it even easier to reconcile your accounts by making transaction memos available in the Active Reconciliation page. If a memo exists for check or deposit an indicator and the text will appear in a new Memo column. This will give you extra context about the transaction without having to leave the page.

It is easier to see when your reconciliation is complete. When the account is out of balance, the Difference amount will show in red; the Difference will turn green when in balance.

Optimized administrator settings
We've simplified the set up of your Outlook Outbound Email settings. When enabled, your clients will receive emails that come from your company email address. We've reduced the number of settings that are required and improved labels. Administrators can find this option under Settings > Company > Email Settings.

Fee schedules now load 90% faster for our largest customers! Smaller customers will see a less dramatic improvement, but the page will be faster across the board.

<u>Easier to use Memo from Invoices</u>
We've upgraded the options in the Memo field on the Invoices page to make it easier to use and more consistent. We've also added a Clear Formatting option to make it easier to copy & paste memos without affecting your invoice formatting.

<u>New Power BI data fields</u>
The Employee Birth Date and Target Utilization columns on the Employee table are now available for use with PowerBI + CORE. Download the December 2023 Power BI update from Microsoft to access.

Application Stability:

This update fixes many issues reported by our users. Key fixes are listed below and are organized by module:

- Accounting
  - Total assets were not matching total liability & equity in some cases on the Balance Sheet by Class Accrual report. This is fixed.
  - The Balance Sheet by Class Cash Basis report does not match the Trial Balance by Cash or Balance Sheet by Cash in some scenarios. This is fixed.
  - A negative AP balance could occur on the Balance Sheet Cash report in one case when a vendor bill had a discount. This is fixed.
  - Cloud feeds could show duplicate transactions when sorting was applied. This is fixed.
  - CSV import of Cloud feeds could show invalid errors. This is fixed.
  - On Vendor bills, the cost rate of expenses would not get saved properly in a certain scenario. This is fixed.
- Billing
  - The loading indicator on batch invoice would not appear in some cases. This is fixed.
  - Zero dollar entries were not marked billed in a certain situation. This is fixed.
- Client
  - Changing the status of a client isn't saved properly in one scenario. This is fixed.
- Employee
  - Changes to Automatic Overtime setting would not get saved in certain scenarios. This is fixed.
- Integrations

- o Reimbursements imported from QuickBooks Online could be miscategorized. This is fixed.
  - o Bad data from QuickBooks Online could cause T&E Reviewer to return incorrect results. This is fixed.
- ePayments
  - o ACH transactions could show incorrect last name in ePayments portal. This is fixed.
- Login
  - o New users will have to set up two-factor authentication (2FA) when they create an account rather than on their second login.
  - o A user will have to reauthenticate with 2FA before changing the 2FA settings on their user profile.
- Project
  - o When creating a phase using project templates, the Project Monitoring settings for the main project or phases can now be copied to the new phase. This saves time and ensures consistency when creating phases.
  - o The Comparison by Budget option from the Structure page would fail to load for lower tier phases. This is fixed.
- Reports
  - o Journal report didn't show how a bill was paid when a vendor credit was used. This is fixed.
  - o Expenses by Vendor report could display an balance that was off by a penny. This is fixed.
  - o Invoice reconciliation report could show the incorrect total expenses. This is fixed.
  - o Transaction details report could miscategorize transactions under **No Payee**. This is fixed.
  - o Time and Expense report would incorrectly order field name when using multiple Group by functions.
  - o Sorting on the Time Verification report was not showing consistently. This is fixed.
  - o The Activity Group filter was not working on the Project Assignment report. This is fixed.
  - o Employee Half Monthly Time Card report would show an invalid total. This total has been removed.
- Time & Expense
  - o Editing the Expense Code on an Expense Entry would fail in certain scenarios. This is fixed.
  - o Submitting a Time Card could display invalid approvers. This is fixed.

- o Time Card would prevent deletion of entries in a row when it should have been allowed.
- o On Time Entries, when changing the Activity of an entry via Batch Update will now change the Description of entry to match the activity.

VERSION 1.1.207 RELEASED ON DECEMBER 12, 2023

Release Spotlight

We've upgraded the Reconciliations section of Accounting in CORE to add functionality and make it easier to use. The major improvements are:

Deposits & Credits and Checks & Payments now have separate totals in the active reconciliation. Customers requested this to make it easier to find the transactions that are not yet balanced.

Labels. buttons, and navigation have all been refined for consistency and clarity. For example, the statement date and account are more clearly identified and you can use the new breadcrumb navigation to move between pages more easily.

We've also fixed bugs with the display of records in the page, navigation, and finalizing the reconciliation. We hope you enjoy these improvements on your next reconciliation!

Product Enhancements

Enhanced two-factor authentication (2FA) security
We've simplified 2FA set up and made it more secure.

Now administrators can require 2FA based on User Role: enable for Owners, Admins, or Regular Users. When users are added to your company, the rules will automatically apply to them.

We've streamlined the registration process for users. Users can now select from authenticator app, text/SMS, or phone call verification methods. Email has been removed as an option because it was not secure. Users can still opt-in to 2FA even if their company doesn't require it from their User Settings page.

New UI enhancements

We've made the following improvements to the new UI to improve your experience:

- Notifications & Messages menus in the top right now show the unread count. We've included a 40% performance improvement in looking up this information.
- The onboarding video shown to new users has been updated to feature the new UI to make onboarding new employees easier.
- When an error banner appears, it no longer hides the save buttons at the bottom of the page.
- We've fixed UI bugs with search in Fee Schedules, editing tax from Settings, Recent projects, Manage Subscriptions, Budget Templates, and creating manual invoices.

Project Monitoring

We've made it easier to set up project monitoring and ensure consistency across your projects:

- When cloning a project, the Project Monitoring settings for the main project or phases can now be cloned along with the other settings.
- When defining Project Templates, you can now set phases to include Project Monitoring settings of the parent project. Projects created from the template will then inherit the Project Monitoring setting.

Time Card subtotals

The Workflow Subtotals on Time Card have been updated:

- Forwarded entries now have their own subtotal row, as requested by customers.
- Rejected entries are now categorized under Unsubmitted.
- Un-Approved entries are now categorized Submitted.

Application Stability:

This update fixes many issues reported by our users. Key fixes are listed below and are organized by module:

- Billing
  - Duplicate invoice numbers could be assigned when multiple users were using Create Batch Invoice at the same time. This is fixed.
  - WUD could be changed when a project was billed in certain scenarios. This is fixed.
- CRM

- - The Sales Goal Performance Widget would not show totals if multiple of them were added to a Dashboard. This is fixed.
  - When a Lead was assigned, the email would show an incorrect subject line. This is fixed.
- ePayments
  - You'll now see now more clear error messages if an ePayment cannot be made.
  - Previously, changes to ePayments settings could cause payments to get out of sync. This is fixed.
  - In certain cases, Statements could be paid twice. This is fixed.
- Expense
  - The Expense Cost Rate could be deleted if a Vendor Bill was opened, then saved with no changes. This is fixed.
- Project
  - Changing the billing contact on a project could cause an error. This is fixed.
- Reports
  - Check Details report would show an incorrect value for "Type" when rerunning the report. This is fixed.
  - We fixed rounding issues on the Quarterly Profit and Loss Accrual Basis and Monthly Profit and Loss Accrual/Cash Basis reports.
  - Project Allocation Earned Revenue Distributive Forecast Report could show the wrong Amount Spent in certain situations. This is fixed.
  - Security Details report displayed incorrect status for Fee Schedule. This is fixed.
  - The Project List report formatted phases differently to other reports. This is fixed.
  - Client Transactions report showed an incorrect balance while using Payment method filter. This is fixed.
  - The sum function would not work if the P/L Drill Down report was exported to Excel. This is fixed.
- Xero accounting integration
  - Entries could not be exported to Xero for monthly time cards. This is fixed.

VERSION 1.1.206 RELEASED ON NOVEMBER 28, 2023

Release Spotlight

You can now automatically send employees reminders when their time cards are incomplete with CORE Time Card Monitoring! Configure the reminders from the Monitoring under Settings menu.

Time Card monitoring relies on Standard Hours per Week being set for an employee. This allows CORE to know what a "complete" time card is for an employee. Use the Employee Missing Time Week View report to see which employees don't have Standard Hours per Week set and batch update from the Employees page to set the value.

Time Card reminders are sent weekly. You can set what day of the week and time you want the reminder sent based on your company work week start. For example, if your work week starts on Sunday, you could set the reminder to Friday at 4pm or the Following Monday at 9am. Optionally, you can set follow up reminders every 24, 48, or 72 hours later.

At the time specified, CORE will send an email and mobile app reminder to any employee who has not met their Standard Hours or has time entered, but not submitted on their time card for the week.

This compliments the Project Monitoring feature released in September. If you would like additional monitors, please send your suggestions to CORE-ideas@bqe.com!

Product Enhancements

Navigation Enhancements
As we continue to prepare for the **retirement of the Classic View on December 5, 2023**, we've made the following improvements to the new UI to make navigation faster:
- Projects menu – added a link to Project Assignments under the Templates & Tools heading.
- Projects menu – added links to Documents, Notes, and To-Dos pages. This had been requested by a number of customers.
- If you pin the navigation menu open, it will now stay open between logins.

QuickBooks troubleshooting
We've added improved logging to our QuickBooks Online (QBO) integration to make it easier for you to identify problems with the integration. CORE will now show a message when an invoice can't be sent to QBO because it is attached to a tax account or if an account has been deleted in QBO. Keep an eye out for more improvements to our QBO integration!

<u>New columns in T&E Reviewer</u>
We've added columns for Comp Time, Income Account, and Expense Account to T&E Reviewer as requested by customers.

Application Stability:

This update fixes many issues reported by our users. Key fixes are listed below and are organized by module:
- Billing
  - Exporting Invoices page to CSV did not include all columns. This is fixed.
  - The formatting bar for memos and custom fields didn't work and covered the text in some scenarios. This is fixed.
  - There could be a penny difference on Cost Plus invoices. This is fixed.
  - Emailing statements would not respect the filters applied before emailing. This is fixed.
  - Invoices could be missed in a statement based on the date filters. This is fixed.
  - On Create Batch Invoice, editing WUD for one entry applied the change to all entries. This is fixed.
- Budgets
  - Budget templates could be duplicated in certain scenarios. This is fixed.
  - Users with delete budget items permission could not do so from within a project. This is fixed.
- Client
  - Updates and bulk updates to Clients wouldn't be saved properly in certain cases. This is fixed.
  - There were errors with the search function for Client. This is fixed.
- Cloud Feeds
  - Selecting "Refresh" could fail to get new transactions. This is fixed.
- CRM
  - Proposals created from an Opportunity did not inherit name, description, and value from Opportunity. This is fixed.
  - The Proposal Builder did not have an option to indicate discount on the Quote. This is fixed.
- Dashboards
  - Employee Allocations widget was not filtering out "Cancelled" projects to align with Allocations page. This is fixed.
  - Income vs Expenses widget would show incorrect expenses when using class filter. This is fixed.

- o To-Dos widget would not correctly sort by Due Date order or display Project & Client names correctly. This is fixed.
- o Time Performance widget could double count entries which can be Vacation, Sick, Holiday, or Comp time in Settings. This is fixed.
- ePayments
  - o The pay now screen showed the wrong Due Date for Retainer Invoices. This is fixed.
  - o ePayment invoices could have broken links or icons when emailed. This is fixed.
- Expenses
  - o Custom field data for an Expense Entry was not being saved in certain scenarios. This is fixed.
  - o The Totals could disappear from the Expense Entries page when the Expense Group filter was applied. This is fixed.
- Fee Schedule
  - o Not all the columns would display in the Fee Schedule table for some users. This is fixed.
- HR
  - o "Available Hours" could be inconsistent due to rounding differences when using different filters. This is fixed.
  - o "Available Balance" would be incorrect when two benefits are assigned to an employee. This is fixed.
  - o Users were unable to Edit Question type in Review Templates from Settings. This is fixed.

- Payments
  - o When making a single payment for two retainer invoices on different projects, the payment would save under one project only. This is fixed.
- Projects
  - o Created by and Updated by fields could be incorrectly set. This is fixed.
  - o On Assignment tab, you were unable to sort on the columns. This is fixed.
  - o Searches including 2 digits on the Project list would cause an error. This is fixed.
- Purchase Orders
  - o Items in a purchase order could get reordered incorrectly if one of the items was deleted. This is fixed.
- Reports
  - o Project List report did not respect the "Hide Phases" display option when grouping by Master Project. This is fixed.

- o Updated invoice numbers were not reflected on the GL report. This is fixed.
  - o Scheduled reports could show Charge Amount to employees who should not have had access to it. This is fixed.
  - o Balance Sheet Cash Basis report could display an incorrect Total Liabilities. This is fixed.
  - o The "Unsubmitted" status filter was not working correctly on the Workflow Details Report for Time Entries. This is fixed.
  - o Aged WIP with AR report could fail to run when a custom field filter was applied. This is fixed.
  - o AR Aging 8 Steps report showed the wrong time buckets when scheduled weekly. This is fixed.
  - o Balance Sheet by Class Accrual report could be incorrect in certain scenarios. This is fixed.
  - o There were errors when exporting Benefit Assignment report to CSV. This is fixed.
- System
  - o Customers from Saudi Arabia could get an error when logging in. This is fixed.
- Time
  - o Before on Time Card, when opening the memo box the status badge would only displayed when Show Status was enabled. This is fixed.
  - o The Time Card memo icon before was unclear. Now, when a memo exists a solid icon displays. When a memo is missing but can be added a hollow icon displays.
  - o On Time Card – Day view and Time Entries, users could edit approved entries without proper permission. This is fixed.
- T&E Reviewer
  - o On T&E Reviewer, users were unable to view the whole JPEG attachment in previewer (can't scroll or zoom). This is fixed.
  - o The Employees filters could display bad data on T&E Reviewer. This is fixed.
  - o The Class column was not exported to CSV. This is fixed.
- Vendors
  - o Previously, you could not void a vendor bill if it had a credit against it. This is fixed.
  - o When importing Vendors, it was not possible to map the Company name field. This is fixed.
  - o Custom cost rates of expenses could be lost on Vendor Bills. This is fixed.

VERSION 1.1.205 RELEASED ON NOVEMBER 14, 2023

Release Spotlight

This release includes the next milestone on the transition to CORE's new look: all customers have been set to use the new look! You will continue to have access to the Classic View until December 5, 2023, when we disable it for all users.

As a reminder, the new look provides clarity in the navigation and helps to improve the overall user experience, including new user onboarding. Key changes include:

- Global Settings Location: We've moved all the global settings to the new Settings menu in the bottom left.
- Productivity Tools Re-organized: You'll find these screens within the projects or other global settings.
- Lists Moved: Lists can be found in the Settings menu at the bottom left in their respective category.

We've made the following improvements to the new look based on customer feedback:

- Added a Templates & Tools section to the Projects menu which makes accessing Project Templates, Budget Templates, and Fee Schedules much easier!
- Simplified the display of the Settings menu.
- Addressed bugs related to custom labels, invoice filtering, and more.

Stay tuned for more of your requested improvements in the coming weeks!

Product Enhancements

Batch Invoicing
We've made the Batch Invoicing page much faster! This release reduces time to load results on the page by more than 50% for our largest customers.

Enhanced Employee Missing Time Week View report
It's now easier to see how all your employees are performing with the Employee Missing Time Week View report. The report now shows all employees and categorizes them by

employees who haven't met their standard hours, employees that have met their standard hours, and employees who don't have standard hours defined.

Set Project Monitoring with templates
Project Monitoring can now be copied to new projects from a project template and to new phases from the parent project. Project monitoring sends automated monitors to inform you about key Budget or Contract milestones, like when the Approved Spent amount exceeds 50% of your Contract. Customize your thresholds and who on your team should be notified by selecting Project > General > Monitoring.

Additional filtering on Aged Receivable Dashboard
The Aged Receivable widget on your Dashboard can now be filtered by either Project Status or by Client.

Application Stability:

This update fixes many issues reported by our users. Key fixes are listed below and are organized by module:

- Billing
  - Late fee invoices were showing a phase name instead of the parent project's name. This is fixed.
- ePayments
  - In a specific scenario, a client was not able to pay an outstanding balance on an invoice. This is fixed.
- Time and Expense
  - Some users were encountering Time Card display issues where the Total column was too narrow. This is fixed.
  - We added a copy option to the Time Card memo, which makes it easier to copy for users who don't have access to edit the memo.
  - The Time & Expense Reviewer batch workflow indicator could get stuck and not update. This is fixed.
  - Sorting by Submit Status on Time Entry page would cause an empty table to display. This is fixed.
- Reports
  - Editing Invoice numbers would not always update across financial reports, including P&L Accrual Drill Down. This is fixed.
  - The Project List report could display an incorrect Contract Balance, Spent amount, and WIP amount in certain scenarios. This is fixed.
  - The Balance Sheet Cash Basis report would sometimes show an AR or AP balance. This is fixed.

  o The dates used by the Semimonthly filter in the month of February were incorrect. This is fixed.

VERSION 1.1.204 RELEASED ON NOVEMBER 2, 2023

Release Spotlight

We're thrilled to announce the transition to CORE's new look, designed with you in mind! The new look provides clarity in the navigation and helps to improve the overall user experience, including new user onboarding. Get ready to experience a modern, intuitive, and powerful CORE like never before.

What's New?

- Sleek New Look: Say hello to a fresh, contemporary design that's not only easy on the eyes but also simplifies navigation.
- Streamlined Features: We've optimized your favorite features, offering more intuitive and efficient workflows.
- Customer-Driven Enhancements: Your feedback has guided us every step of the way, resulting in a CORE that truly caters to your needs.
- No Functionality Left Behind: We've kept all your beloved functionality from the classic view, now seamlessly integrated into the new look.

What's Changed?

- Global Settings Location: We've moved all the global settings to the new Settings menu in the bottom-left.
- Productivity Tools Re-organized: You'll find these screens within the projects or other global settings.
- Lists Moved: Lists can be found in the Settings menu at the bottom left in their respective category.

Mark Your Calendar

- November 14, 2023: Get ready as we turn on the new look for all users.
- December 5, 2023: Say bye to the classic view as we disable it for all users.

Stay tuned for more updates and get ready to explore the next level of CORE excellence.

Product Enhancements

Time card improvements:
- We've simplified the "Auto-create Time Card activities" user setting to make it easier to use. Entries will auto-create if you've recently billed time against them, and if you remove a time entry it won't reappear until you add it back to your Time Card.
- You can now clear formatting from memos to help you copy & paste memos from another application. Select the text and click the icon to clear formatting.
- We've made it easier to close the Time Card memo modal. Now you can use the Esc key or click away from the modal to close it and see more of the Time Card.

Simplified project navigation: We've relabeled "Manage Projects" to "Projects" and listed the recent projects at the top of the menu so the recent projects are easier to find. In upcoming releases, we'll make it easier to access key features like project templates, documents, and to-dos.

Application Stability:

This update fixes many issues reported by our users. Key fixes are listed below and are organized by module:

- Billing
  - Users in Costa Rica were encountering errors entering values on Batch Invoice. This is fixed.
  - The memo field was simplified to make it easier to know when the memo is saved. This is fixed.
- Budget
  - In certain cases, budget line items were not saved. This is fixed.
  - When creating new budget from existing the search function didn't work consistently. This is fixed.
- ePayments
  - Customers using statements with ePayments could encounter issues with partial payments and email notifications. These issues are fixed.
- Project
  - Phases created from a template could not be reordered in certain cases. This is fixed.
  - Late fee invoice amounts were included in the Billed values on the Structure tab. This is fixed.

- Public API
  - Creating checks using the isEFT field was causing an error. This is fixed.
- Reports
  - The total of the P&L Cash Basis report could differ from the Balance Sheet Cash report by a few pennies. This is fixed.
  - Project T&E report would group values incorrectly if a Vendor & an Employee shared the same display name.
  - The drill downs didn't work properly on the Monthly Financial Budget vs Actual report. This is fixed.
  - Retainer reconciliation report was missing the ability to sort by date. This is fixed.
- QuickBooks Integration
  - Sending a phase with a billing of zero to QuickBooks would result in an error. This is fixed.

VERSION 1.1.203 RELEASED ON OCTOBER 17, 2023

Product Enhancements

Easier access to T&E entries pending approval during invoicing: From Batch Invoice, you can now right click to review T&E entries pending approval to open in a new tab.

Time & Expense improvements: We made the following updates to T&E:
- Time card font returned to standard size. We had made the font larger in a prior release, but customers didn't like it.
- For both Time and Expense Entries, the security bits are now more consistent and clear. Un-submit is now allowed only if you have "Allow edit submitted entry" and Un-approve the entries of others is now allowed only if you have "Allow Approve entries of others".

Aged WIP with AR report updates: It's now easier to track billing performance on the Aged WIP with AR report with the ability to Group By Client, Client Manager, Master Project, Project, or PM.

Customize columns on Employee List report: You can now select up to 7 custom columns on the Employee List report. Custom columns are also available on the Client List and Project List reports.

<u>Vendor Bill API filtering:</u> Finding the right payment is now easier and faster when using the Vendor Bill API with filtering by payment status & balance.

Application Stability:

This update fixes many issues reported by our users. Key fixes are listed below and are organized by module:

- Billing
    - The Billed to Date column on Create Batch Invoice did not include Expenses in some cases. This is fixed.
    - When sending invoices, in certain cases you couldn't select an email to add to the CC line. This is fixed.
    - Certain invoice templates were including late fees in the percent complete. This is fixed.
    - A retainer memo could appear incorrectly on an invoice if a reference number was reused. This is fixed.
- CRM
    - When using the group by setting, the Contacts report would be blank. This is fixed.
    - The Opportunities report would not sort by stage. This is fixed.
- ePayments
    - In certain scenarios, the credit card fee would be recorded incorrectly on the ePayment deposit. This is fixed.
- Mobile
    - Scrolling was not working when opening an ePayment invoice or statement from the mobile app. This is fixed.
- Project
    - On very large projects, the existing budgets would not load when creating a budget from existing budget. This is fixed.
    - In the new UI, creating a PO from the budget section could cause the screen to freeze. This is fixed.
    - Batch updating To Dos could cause an error. This is fixed.
    - When creating a project from a template, the status of the project was always set to Active instead of the value in the template. This is fixed.
- Reports
    - Large currency amounts would display incorrectly on the Monthly Financial Budget vs Actual report. This is fixed.
    - The AR Aging 8 Steps report could not be exported to PDF. This is fixed.
- Settings

- o In the new UI, not all Activities would display when merging T&E Activities from the Settings page. This is fixed.
  - o In the new UI, certain screens would not display under Favorites. This is fixed.
  - o When using custom labels and a phone number with extension, the contact record could get duplicated. This is fixed.
- Time & Expense
  - o Date and currency formatting errors could appear when entering time or expenses for customers in certain countries (Costa Rica, Dominican Republic, Jamaica, Philippines, South Africa). This is fixed.
  - o Time entries were not using the correct Cost Rate when an activity was set up in a fee schedule and for an employee. This is fixed.

VERSION 1.1.202 RELEASED ON SEPTEMBER 29, 2023

Release Spotlight

Enhanced status tracking on Time Card
We've made it easier to read and understand your Time Card with subtotaling and improved display of statuses in the week view.

You can enable subtotaling by workflow status to see how time is progressing from submission through billing. Or quickly toggle to subtotal by entry details – including how many hours are marked non-billable, extra, comp, or overtime. Plus, you can filter by any of the subtotals to focus on certain entries.

Other improvements made to Time Card:
- Less chance for error – uneditable entries are clearly identified in gray.
- Easier to read – larger text size for key information and consistent indicators for entry status.
- Fewer clicks – Comp time can now be set on the memo modal instead of having to leave the page.
- Plus Time Card is faster!!! We're excited to say we added these new features and made Time Card 40% faster!

Soon, we'll have a more improvements to how removing time entries works on your Time Card.

Product Enhancements

Faster saved filters: We have improved the performance of saved filters across CORE. Customers who use filters regularly will see the biggest improvement, with pages loading in half of the time.

Easier error tracking: Errors in CORE will now be accompanied by a unique reference or correlation ID. If you encounter an error, include this correlation ID when reporting to Support@bqe.com for a faster resolution.

Application Stability:

This update fixes many issues reported by our users. Key fixes are listed below and are organized by module:

- Billing
    - Certain recurring projects could be missing on Create Batch Invoice when filtering by recurring projects. This is fixed.
    - Invoices attached as .zip files to emails sent via CORE Outlook could be corrupted and were unable to be opened. This is fixed.
    - Create Batch Invoice would throw an error in some cases when over 1,000 projects were loaded. This is fixed.
    - A rounding issue could cause the Invoices screen and the invoice document to differ by 0.01. This is fixed.
- CRM
    - The Opportunities report was not displaying correct records when a filter was applied on a custom field. This is fixed.
    - The Leads page could incorrectly display City and State. This is fixed.
- ePayments
    - ePayment fees were incorrectly displayed on the ePayment Details, ePayment Deposits Details, and ePayment Deposits Summary reports. This caused totals to display incorrectly. This is fixed.
    - Changing the From or Fee Account for a deposit could affect the deposit Amount. This is fixed.
- Project
    - Customers had to re-enter the quick filter when navigating back to the Manage Projects page from within a project. This is fixed.
    - On Main projects, the project contract amount was displayed to users who should not have had access to the contract amount. This is fixed.

- o Once an invoice template was assigned to a project template, it could not be removed. The invoice template can now be removed.
- o When a quick filter is in use on Manage Projects page and a batch update is made, the update would not always take effect. This is resolved.
- Settings
  - o Customers were unable to set their DCAA password. This is fixed.
- Time & Expense
  - o The memo toggle was not working in some situations. This is fixed.
  - o Markup could be stored incorrectly when expenses were added via mobile. This is fixed.
  - o The link to the T&E Reviewer screen from the email notification would not go to the correct page. This is fixed.

VERSION 1.1.201 RELEASED ON SEPTEMBER 15, 2023

Product Enhancements

ePayments awaiting payout: When a client has initiated a payment via BQE ePayments, and is awaiting payout, you will now see a banner message on the Deposits screen informing you of the status. With a single click, you can open the ePayment Details report and see which payments are awaiting payout.

Batch Update improvements in T&E Reviewer: You can now more easily track your batch updates to T&E and batch invoice entries. Before, when updating hundreds of records, it was unclear if the changes had been made or were still in progress. You will now receive a notification when the batch update is finished, confirming the number of records which were updated and if there were failures.

Reports: We have made several improvements to your reporting experience:
- The Client List report now supports column customization.
- The Employee Daily Time Card report is 20% faster and has additional filters.
- The Billed Time & Expenses report is 50% faster on average.

Application Stability

This update fixes many issues reported by our users, ranging from minor annoyances to critical fixes to our billing, reporting, and other modules.
- Billing

- - Projects would appear incorrectly when filtering by Master Project and combining by Client. This is fixed.
    - Some users were encountering a timeout when generating hundreds of invoices at once. This is fixed.
- CRM
    - Smart fields were not being populated when emailing Prospects or Leads from CRM. This is fixed.
- Emails
    - The configuration to send emails via Office365 would incorrectly reset to CORE sending emails. This is fixed.
- ePayments
    - Clients were encountering issues paying dozens of invoices at once from a single statement. This is fixed.
    - Canadian clients using a credit card would encounter an error making a payment. This is fixed.
- Project
    - The Spent Amount wasn't matching across the project. The Structure tab, Performance tab, and project snapshot now align.
- QuickBooks Integration
    - Some customers were encountering issues connecting with QuickBooks. This is fixed.
    - QuickBooks Online invoice payments would be sent to CORE as retainers prior to the invoice being synced. This is fixed.
- Reports
    - There would be a rate mismatch between the screen and Project Allocation Earned Revenue Distributive Forecast report. This is fixed.
    - The Unpaid Vendor Bill report date filters were not working in all cases. This is fixed.
    - The Trial Balance Accrual Basis report and drill down would be wrong when tax was used. This is fixed.
- Time Card
    - The memo icon was showing even when no time entries were entered if you pre-populated the memo from, say, a fee schedule. This is fixed.

VERSION 1.1.200 RELEASED ON SEPTEMBER 1, 2023

Release Spotlight

Automatically track key project milestones with CORE Monitoring
We're excited to introduce CORE Monitoring! You can now set automated monitors to inform you about key Budget or Contract milestones. Customize your thresholds and who on your team should be notified, and CORE will send out in-app or email notifications when the Approved Spent reaches the milestone.

Set up your monitors from your project, select General, then Monitoring. We look forward to adding additional monitors, so if you have something you'd like to monitor please send your request to CORE-ideas@bqe.com.

Product Enhancements

Faster, easier to use Time Card and memos: We have made three key improvements to Time Card based on customer submissions to CORE-ideas@bqe.com:
- We've simplified the memo entry process on Time Card – Week View. You can now use Tab to move between the time entry cell and the memo – no clicks required!
- Memo text which is defined on Activity, Expense, Fee schedule service or Fee Schedule will populate right when you open the memo. This applies to all the time and expense entry pages.
- The totals on the Time Card now load 30% faster.

Keep an eye out for more improvements in upcoming releases that make it easier to understand the status of your time entries.

Project navigation breadcrumb: We've added the breadcrumb to the project details screens to make it easier to see where you are in a project and navigate with fewer clicks. Click on any parent phase to jump up the project hierarchy. You can configure what project and phase information appears in your breadcrumb from the Project section of Settings.

ePayment Deposits Detailed Report: The new ePayment Deposits Detailed Report delivers a detailed view of all payments and fees associated with ePayments. Accessible from the Payments screen.

Faster Create Batch Billing screen: We have made significant performance improvements to Create Batch Billing screen. Customers with large project sets will see the biggest improvement, with projects loading in 20% of the time.

Application Stability:

This update fixes many long-standing issues reported by our users, ranging from minor annoyances to critical fixes to our billing, reporting and other modules.

- Accounting
    - A performance issue in Chart of Accounts was fixed.
    - Balance Sheet by Class Accrual Report was incorrect after creating a check with one or more negative line items. This was fixed.
    - 1099 Report was not displaying vendor expenses paid by credit card. This was fixed.
- Billing
    - Invoices on cost plus percent projects could have a penny round incorrectly. This was fixed.
    - Invoice numbers were not displayed properly when exported to CSV from Invoice list and Time and Expense reviewer screens. This was fixed.
    - Invoice templates were not displaying certain fields properly when Custom Labels were used. This was fixed.
- ePayments
    - Deposit details could display a penny difference for ePayments. This was fixed.
    - Credit Card Passthrough fees were incorrectly labeled as ACH Passthrough fees. This was fixed.
- Reports
    - The Project Time and Expense Report was missing headers when exported to CSV. This was fixed.
    - Work In Progress Detail Report displayed cost amount even when cost rates were hidden for a user. This was fixed.
    - The summary of the Project Account Details Report did not follow the time expense date filter. This was fixed.
    - Project Time and Expenses Report now supports a new filter – Invoice number.

VERSION 1.1.199 RELEASED ON AUGUST 15, 2023

Product Enhancements:

Clients ePayments made easier: We have enhanced the Invoice ePayments page to alert your clients about any additional unpaid Invoices after they have successfully recorded a payment. This will be controlled by setting ePayments > Settings > Ask Customers to pay other unpaid Invoices when they pay an Invoice.

BQE ePayments Fee visibility: You will now be able to click the amount fields under Deposits>New Funds section to see the associated Payments and invoices.

Time and Expense Detailed report: New Time and Expense Detailed report added to the report list. The report supports Column selector and multi-Level grouping.

Easier accessibility to Memos in Timecard: We have renamed the menu item, show entry details to Show memo. You will not be able to turn it off if your company level setting, Time entry memo required is on.

Easier accessibility to Timecard Preferences (Classic UI)/ Time Settings (New UI): We have swapped the position of Show/ hide status option with Time Settings (New UI) / Preferences (Classic UI) to make it easier for you to reach to the preferences that drive your timecard.

Contract amount remaining: You will now see the unallocated contract amount under contract amount field in Project Details and in Project>Structure tab. This will help in avoiding the overallocation of contract amount to phases of a Main type project.

Application Stability:

This update fixes many long-standing issues reported by our users, ranging from minor annoyances to critical fixes to our billing, reporting and other modules.

- Time and Expenses report now supports new filter – Invoice number.
- Payroll report now supports new filter - Paid.
- Application will not allow updating Employees in time or expense sections while editing an invoice.
- Updated column name from Open AR to Open Invoices in Project List report, column selection tab.
- Added dynamic tooltips to Employee and Vendor Utilization Widget to reflect the value set in Global settings.

- The selection of show dropdown under Project > Assignments tab is now remembered when you switch between a project to one of its phases.
- We have added a disclaimer to the Workflow report to make it obvious which entries are included in the report.
- ePayments don't move to success due to "not linked to any employee" error. This was fixed.
- Invoice Screen -> Filtering by Project manager would sometimes throw an error. This was fixed.
- Batch invoice would through an error when project count was more than 1500 projects. This was fixed.
- AR Aging' report displayed a strange row with text '330' or -240 on the report. This was fixed.
- Employee Time card summary report displayed approved entries even when Un approved was used. This was fixed.
- Charge column on Project Time and Expenses report displayed amounts with 6 decimal places. This was fixed.
- Omani currency was not reflected in the project screen. This was fixed.
- Expense Group filter was not working in Project Time and Expenses' report. This was fixed.
- Voided Bill Payments showed up on AP Aging report. This was fixed.
- Negative amounts were not handled properly in Time and Expense report. This was fixed.
- Internal Server error was displayed while running reports in some cases. This was fixed.
- Spent columns in the Budget comparison report displayed unapproved time/expense entries. This was fixed.
- Email notifications were providing incorrect information when invoices on a statement were partially paid using cc. This was fixed.
- Grouping changed in Billed Time and Expense report on memorizing the report. This was fixed.
- The Billable work history report displayed incorrect data in a particular scenario. This was fixed.
- An issue was report in Staff workload widget > used hours. This was fixed.
- Expenses by vendor report displayed incorrect amount in one of the cases. This was fixed.
- Some Months/ Weeks were ignored in cash flow widget, Money owed widget and Retainer balances widget. This was fixed.
- Penny difference observed in Phased, Cost-plus Invoice Templates. This was fixed.
- Retainer Available Column was displaying incorrect values in one case. This was fixed.

- While trying to find related vendor bills after paying an invoice, all vendor bills were not displayed. This was fixed.
- Money Owed widget was displaying incorrect Aging. This was fixed.
- Paid Time off widget, Time Performance Widget and Employee Paid Time Off report show incorrect values in one scenario. This was fixed.

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VERSION 1.1.198 RELEASED ON AUGUST 04, 2023

Product Enhancements:

Time and Expense Summarized report: New Time and Expense Summarized report added to the report list. The report supports Column selector and multi-Level grouping.

Enhanced dropdowns in Report center: Dropdowns in report center are now consistent with rest of the application. These dropdowns will entertain the text entered to filter dropdown lists.

Application Stability:

This update fixes many long-standing issues reported by our users, ranging from minor annoyances to critical fixes to our billing, reporting modules and other modules.

- Create batch Invoice > Processing large set of Invoices would error out. This was fixed.
- BQE ePayments > Accounts were sometimes flagged as inactive. This was fixed.
- Invoice Emails > Using Outlook provider, Invoices were sent out to unintended customers in a scenario. This was fixed.
- ClientPay > Pass through Fee calculation for ClientPay was charged. Restored the legacy calculations.
- Invoice screen > Manage documents was not showing full list of expense attachments. This was fixed.

- New UI > New row was not getting added in split billing On Billing Options in the Edit project screen. This was fixed.
- Opportunity > Budget attributes were associated to parent project instead of the phases when creating a project from an opportunity. This was fixed.
- Opportunity > While converting an opportunity to a project. The associated Fee schedule was not copied. This was fixed.
- Project screen > Made the toggle state of show/ hide phases intuitive and easier to understand.
- Timecard > Managers were not able to create/ update memos of employee even when security setting, allow access to employee I manage was set to true for them. This was fixed.
- Project Screen> Creating a client contact from billing contact dropdown > quick create would create a contact with inactive status. This was fixed.
- Timecard > Allocation summary in Timecard would show double used hours in some cases. This was fixed.
- Financial Budgets > Updating Memos was updating the Fiscal year field. This was fixed.
- QBO Sync > Invoice send would not respect start date filter if end date was left empty. This was fixed.
- Timecard > Timecard would not reflect the extra flag when an activity marked extra was used. This was fixed.
- Create batch Invoice-> Actual contract type of main project was not displayed when projects with multiple parent – child hierarchy was used. This was fixed.
- Allocation screen > Performance issue was observed while copying a large dataset of allocation from a project. This was fixed.
- Retainer screen > Incorrect balance in total Received column was displayed while processing a large set of retainer payments for a project. This was fixed.
- Productivity Tools > All groups were shown to users with limited security. This was fixed.
- Invoice screen > Voiding current Late fee invoices and regenerating those would result in duplicate invoice number associations. This was fixed.
- Credit Memo > While downloading the pdf of a particular entry. All credit memos were displayed on the pdf. This was fixed.
- Create batch Invoice > Glitch related to net bill being incorrectly calculated while unchecking the "Use billing schedule reminder date" was fixed.
- Recurring Invoice > Wrong "next bill date" was being displayed in a scenario. This was fixed.

- Timecard > Users from "RWANDA" were not able to view their timecards. This was fixed.
- Manual Invoices > For Projects without any time or expense, Income account was not inherited from the Project. This was fixed.
- HR Benefits > Benefits were incorrectly calculated in certain scenarios. This was fixed.
- Retainer payment > Retainer payment date was not updated to the invoice when applied in the invoice screen. This was fixed.
- Reports > Retained Earnings Account was not following display settings on any financial reports. This was fixed.
- Reports > Newly added Project List report was throwing exception in a certain combination of columns. This was fixed.
- Scheduling > In a certain scenario, scheduled reports were not updating if they were created from a memorized report. This was fixed.
- Reports: AP Aging Credit report was fixed to show a certain type of General Journal entries.
- Reports > Benefit Usage report was showing up blank in a particular scenario from report center. This was fixed.
- Reports > Financial Budget Vs Actual report was not grouping sub accounts properly. This was fixed.
- Reports > Email Body was showing up on Statement report itself if the email was sent without preview. This was fixed.
- Reports > Project Account Details report was not supporting the Document Map. This was implemented.
- Reports > Activity Items report was not respecting the Group Filter. This was fixed.
- Invoices: Joint and Phased Invoices did not include Retainer Payments in Account Summary's BTD and PTD fields.
- Report Center: For certain users, Custom reports tab was showing unused categories. Tab was handled to show only Active categories.
- Reports > Project Allocation Units Report fails to show data under other tasks. This was fixed.
- Reports > Client Performance Report had inconsistency with regards to Retainer Balance. This was fixed.
- Invoice Collections > Screen would show Paid invoices if, user navigates from Money Owed Widget on Dashboard. This was handled to show only Open invoices.
- Dashboard > Workflow widget: Purchase Order takes user to T&E Reviewer instead of Purchase Order screen. This was handled to open Purchase order screen.

- Dashboard > For Canadian users, Allocation widget would not show details. This was fixed.
- Invoice Collections > Notes on Invoice Collection screen and Collection Notes with Aging report would show inconsistent dates. This was fixed.
- Reports > Balance of individual Accounts on Quarterly Financial Budget Vs Actual report would not tally with Total Income. This was handled on Report template.
- Reports > AP Aging report would show employees upon filter by Vendor Group. This was fixed.
- Dashboard > Project Schedule by Allocation widget does not display chart for client. This was fixed.
- Scheduling > In certain cases Run Schedule would not work if we kept the email recipient as Employee Manager.
- Reports > Filters would repeat on Cash Flow Monthly Statement. This was fixed.
- Reports > Client Group filter was broken on Client Performance Report. This was fixed.

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VERSION 1.1.197 RELEASED ON JULY 21, 2023

Application Stability:

This update fixes many long-standing issues reported by our users, ranging from minor annoyances to critical fixes to our billing, reporting modules and other modules.

- Account List> Not all accounts were loaded when sorting by account number. This was fixed.
- Activity > Sort column is not remembered when a new activity is added. This was fixed.
- Allocations> Uses had reported issue with Projects/Resources duplicating in Forecasting Manual view. This was fixed.
- Expense Entry >Check Number column not displaying data after applying a Bill Payment. This was fixed.

- Create Batch Invoice > An issue with the billing screen would prevent any projects from loading when Invoicing using Project range filter. This was fixed.
- Create Batch Invoice > Users would see a blank dropdown for Master Project if manager is selected as the primary column sort under Invoice Option screen. This was fixed.
- Create Batch Invoice > Few users had reported issues with the exclude time and expense feature that prevented them from processing Invoices. This was fixed.
- Credit Memos > The system would restrict the Project list to the ones that the user has been assigned as a project member. This was fixed.
- CRM > When we win an opportunity and create a project using project template, the SFS and Project Assignments are not copied to the new project. This was corrected.
- Dashboard > Hours widget on dashboard was not showing the correct details when the widget is used multiple time on the dashboard. This was fixed.
- Dashboard > If we apply 'Assigned By' filter in the To-Dos widget, it does not display any data. This was corrected.
- Dashboard > In certain scenarios, Money Owed widget would show Wrong Aging. This was fixed.
- Dashboard > Project allocation widget does not show data against phased project when using resource filter. This was fixed.
- Dashboard > Round off issue on PTO & Comp Hours widget. This was fixed.
- Dashboard> Drilling down on Time related submissions in in the workflow widget would include expense entries in the reviewer screen. This was fixed.
- Dashboard> Fixed an issue that would cause ToDos' to be repeated in the widget as many times as there are employees in the group.
- Expense Entry > Fee Schedule rates were not being respected on updating an Expense entry. This was fixed.
- Expense Entry > Fixed an issue with the tab key to move between various fields.
- Expense Entry > Users had reported issues with the Batch update function for Paid flag. This was fixed.
- HR Benefits > There was an incorrect roll over of balance hours when using reset of January 1. This was fixed.
- Invoice Templates > 'Manual Invoice with Contract summary' invoice was showing tax part of contract. This was fixed.
- Invoice Templates > There was an Issue Previewing Split Billing Invoice. This was fixed.
- Invoice Templates> 'Manual Invoice Custom Ordering' Invoice template not showing in correct order. This was fixed.

- Invoice Templates> There was an Issue with the Pay Now button link when previewing ePayments enabled Invoices together with an Invoice(s) that did not have ePayment option enabled. This was fixed.
- Invoices > Invoice template preview makes CORE becomes unresponsive (if you click before the template preview loads). This was fixed.
- Invoices > There was an issue with Custom Date filter on Invoices screen for Australian companies. This was fixed.
- Invoices > When viewing the detail of a Phased Invoice, Phase ID would be shown instead of the Parent Project. This was fixed.
- Manual Invoices > Fixed an issue with the "Approved Time and Expense" option skipping hours in the processed Invoice.
- Payments > When receiving retainer jointly for 2 phases, it would show up under a single phase. This was fixed.
- Project > Cloning a project with "Hold" creates the new Project in Active status. This was fixed..
- Project > Project Tabs would collapse on all screen resolutions. This was fixed.
- Project > There was an issue with Project group and Project manager filter, when used in combination. This was fixed.
- Projects > There was an issue when issuing batch update when filtering the list by Project status. This was fixed.
- Reports > An issue was causing total income to double on monthly financial budget vs actual report. This was fixed.
- Reports > 'As of filter' broken in monthly P&L accrual basis report. This was fixed.
- Reports > Budget comparison summary report shows zero spent hours for many projects when Status filter is applied. This was fixed.
- Reports > Cost and Bill Rate Security was not being followed on few reports. This was fixed.
- Reports > Expenses by Vendor report filter was broken. This was fixed.
- Reports > Fixed a display issue with Check Details report.
- Reports > Fixed an Issue with custom fields AND filter in Employee Daily Time Card report.
- Reports > Fixed an issue with Unpaid Vendor Bills report that prevented random unpaid bills from appearing on the report.
- Reports > Quarterly Financial Budget vs Actual shows double filters. This was fixed.
- Reports > Retained Earning Account does not obey the Display as Settings on Accounting Reports. This was fixed.
- Reports > Updated Client Contact does not show up on Credit memo Receipt report. This was fixed.

- Reports> Fixed an error when using preview format as Excel in AR Aging/AR Aging 5 Steps reports/Monthly Profit and Loss reports.
- Reports> There was a typo in Standard Reconciliation Reports. It was fixed.
- Reports> There was an issue in Project filter when saved as favorite/memorized report. This was fixed.
- Reports> We have fixed an Issue with the 'Billable work history' report.
- Security > There was an issue with Project security bits 'Allow set Billing Information' and 'Show billing options'. It was fixed.
- Time Card >If the user sets country as OMAN in user profile, then Time card does not load. This was fixed.
- Time Entry > Activity from Inactive group assigned to Project shows up in the Activity List Dropdown. This was fixed.
- User Prefs> When saving default view to "Last Screen Visited", upon refresh it is set back to "Dashboard". This was fixed.
- Vendor Bills > Link time expense->Time or Expense views>sort by date in AUS format is not correct. This was fixed.
- Vendors > "Import from CSV" did not have a mapping option for the last name. This was corrected.

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VERSION 1.1.196 RELEASED ON JULY 07, 2023

Product Enhancements:

BQE ePayments Payout Reconciliation: Accounting users can benefit from real time syncing of bank payouts with CORE deposits. Each deposit will provide details on the enclosed payments as well as any transaction or non-transaction fee that was incurred as part of the payout. Additionally, in-app notifications will keep you informed about successful bank payouts.

Invoice emailing with Outlook 365: Admin users can now connect firm's Outlook 365 account to CORE and designate it as the preferred email service for outbound Invoice emails.

Project Contract Amount with Percent of Project: Now you can enforce project contract amount discipline across phases by turning on this new setting. Once turned on, the Project and their phases will not allow Project contract amounts to exceed the Parent project contract amount during set up.

Processing Fee visibility: The Payment details screen now includes a breakdown of the processing fee associated with BQE ePayments. Additionally, you will find details about the processing fee on the ePayments page and in the payment confirmation emails.

EPayment Deposits Reporting: The new ePayment Deposits report offers a concise overview of deposits associated with ePayments. This report presents key details such as the number of payments, fees, total payment amount, and total fee amount, providing a comprehensive snapshot of deposit information. Accessible from the Payments screen, this report delivers a summarized view that facilitates quick analysis and understanding.

Enhanced Invoice Register Report: The Invoice Register report has been enhanced to allow up to three levels of grouping. The enhanced grouping options will be available on any standard instance of the Invoice Register report including Standard, Memorized, Favorite or Scheduled tabs. The re-organized records will allow you to review data more efficiently.

Application Stability:

- Invoice > Manual invoices were ignoring hours in one scenario. This was fixed.
- Time Entry > Batch update of custom fields not working in a one scenario. This was fixed.
- Time and Expense Reviewer > Actual hours can now be exported to csv.
- Invoices > Vendor name was not displaying in case of joint invoices on one template. This was fixed.
- Invoices > Memo not displayed in some scenarios in case of split invoices.
- Fee schedule > Batch update of pay rate multiplier was not working. This was fixed.
- Custom Fields > Custom fields related to Budget service and expense can now be created in the settings.
- Sales Forecast > Sales forecast screen was displaying duplicate opportunity in one case. This was fixed.
- Prospects > Importing prospect was failing in some cases. This was fixed.
- New UI > Scrolling issue fixed in Fee schedule, security, and couple of other screens in settings area.
- Projects > Table header position fixed in Budget tab.

- Reports > Mismatch between HR Screen, PTO Widget and HR reports was reported in certain cases. This was fixed.
- Reports > Realization Rate amount was added to Employee Time Detail Report.
- Reports > "This Biweekly" filter would display incorrect results in certain cases. This was fixed.
- Reports > Error was observed in Time and Expense Details Report in T&E Reviewer screen while Paid Date filter set. This was fixed.
- Reports > Billed Time and Expense Report was incorrectly following alpha numeric sort. This was fixed.
- Reports > Billing Analysis, Time and Expense, Payment Details, Percentage Billed, Client Transaction, AR Aging, Work in Hand Report, excel export was displaying #Value in place of blank cells and in certain cases Numbers were stored in text format. This was fixed.
- Reports > Employee Time Card Summary Report was failing to export in certain cases. This was fixed.
- Reports > Project Time and Expense Report was fixed for Penny difference with T&E Reviewer. This was fixed.
- Reports > Purchase Order Invoice Report was not following Zip code masking. This was fixed.
- Reports > Statement was missing invoices in Mountain Time Zone, if invoices are created and previewed on the last day of the month. This was fixed.
- Reports > Workflow status filter was broken in Employee Time Details Report. This was fixed.
- Reports > Invoice Register Report was not following Display Project set in Global Settings. This was fixed.
- Reports > Work in Progress Details Report was showing Phase Name instead of Master Project Name in account summary if grouped by Master Project. This was fixed.
- Reports > Billing Analysis Report was not leaving any space between Project Managers First and Last name. This was fixed.
- Reports > Vendor Group filter was broken in Time Card Cross Tab report. This was fixed.
- Reports > Project Account Details Report shows Paid Invoices as Open in Payment method was set as Credit. This was fixed.
- Invoice template > Vendor name was not displayed in certain cases on Joint Invoice template. This was fixed.
- Reports > Opportunity Report would repeat opportunities as number of times as tags linked to the prospect. This was fixed.
- Reports > Transaction Date filter was broken in certain scenarios for Work In Hand report. This was fixed.

- Reports > Open Purchase Order report would show extra page at the end. This was fixed.
- Reports > Top N Clients report would show totals irrespective of filters assigned to it. This was fixed.
- Dashboard > Workflow widget not directing to correct screen upon clicking Invoices or Vendor Bills. This was fixed.
- Dashboard > Project Status Widget, would display Non-PM employees. This was fixed.

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VERSION 1.1.195 RELEASED ON JUNE 24, 2023

Product Enhancements:

Define Employee Utilization basis: On top of the default calculation that uses actual hours, we now offer the option to use standard hours or standard hours less deductions (include sick, vacation and holiday) as basis for calculating Employee Utilization, empowering Owners/admins to better understand how employees are truly utilizing their time against active, billable work and non-billable work.

BQE ePayments updates:

Updated ePayment Details report: We had added the "Net ePayments Amount" column to this report to help users understand the net payment amount.

ePayments onboarding improvements: New users that sign up for BQE ePayments are now made aware of the mandatory 10 day hold for payouts as soon as they complete merchant onboarding.

Manage ePayment profiles: This update adds the ability to delete ePayment profiles even though they are in use. This neat housekeeping feature will allow existing and new ePayment customers to consolidate their ePayment set up and manage a smaller list.

Edit Deposits: Feel free to edit bank deposits that are tied to ePayments to make any adjustments, allowing for more accurate reconciliation with bank statements.

Performance Optimizations:

Add payments experience has been optimized to handle large number of Invoices (~300) in single payment. Similarly, we have optimized the Invoice number update to handle projects that have large number of phases (~350).

Application Stability:

- Account Reconciliations > Few accounts types like "Other Current Assets", "Other Current Liabilities" were being ignore from the list of account that can be reconciled. This was fixed.
- Projects > We have fixed an issue with documents security that would make project documents accessible even though the logged user was restricted to documents that they had created.
- Projects > There was a UI distortion issue when switching projects in the Budget view. This was fixed.
- Projects > Total project count would not show the correct number when automatic page scrolling for new records in collapses mode. This was fixed.
- Invoices > Time/expense entry was being set as "billed" after excluding/deleting when creating a Manual Invoice. This was fixed
- Messages > Optimized the list view to handle large number of messages (~1000's) and also respond to sort actions.
- Notes > We had fixed an issue that was preventing any formats to notes to be saved.

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VERSION 1.1.194 RELEASED ON JUNE 10, 2023

Product Enhancements:

Projects List Column Selector: The Projects List report has been improved to include more columns on the column selector. Companies can now mix and match more project data to view at once and improve their efficiency.

Project Snapshot contextual reporting: The Billing Analysis report can now be launched from within the Project Snapshot to allow for quicker review of key project data. Users can click on the Usage section title to launch the contextual report from within the Project Snapshot.

Improved pass through set up for BQE ePayments: Set up your pass-through preferences with confidence as we have optimized Credit card and ACH fees pass through. No more guessing as we will pre-fill the recommended values to achieve 100% pass through. A safety check was added to prevent admins from accidently setting up pass through that exceed your processing fees.

Quickly access Payments: Payments tied to a deposit can now be opened in a separate tab by clicking on the amount field, thus giving users an easy way to access payment details.

ePayments page and email enhancements: We have made updates to the ePayments page to help end clients with payment method and processing fees options. Also, added message footer text in the payment page and ePayments email, to highlight the top tier security promise that comes with BQE ePayments to help drive more ePayments.

Application Stability:

- Projects > An issue in the budget tab would prevent users from updating hours field for the parent project. This was fixed.
- Projects > We have rectified an issue that prevented specific projects from appearing when active filter was applied.
- Budget > There was in issue with pulling the correct rates when a fee schedule was associated to a budget. This was fixed.
- Time and Expense > There was an issue with workflow filters when "approved" was excluded after select all checkbox was clicked in the filter dropdown. This was fixed
- Time and Expense > Several non-US customers had reported an issue in the "As Of" date filter option. This was fixed.
- Invoices > We were using the wrong label for ePayments section on this screen. This was corrected.

- Invoices > The previously billed column under Invoice details was including MST amount and MET amount as well. This was fixed.
- Save filters > The save filters pop up now allows users to type in the filter name directly without the need to click in the filter name text box.
- Reports > The Project Cost Multiplier report was showing Cost Amount even when cost rates were hidden for a user. This was fixed.
- Reports > The AR Reconciliation report was not showing Account Receivable Payments when applying the Invoice number filter. This was fixed.
- Reports > Custom label global setting changes were not being properly reflected on reports. This was fixed.
- Reports > The Work in Progress Details report was not properly loading when a custom field filter was applied in combination with a start date filter. This was fixed.
- New UI > Settings > Project Templates > Assignments view was restricting the number of records to 25. This was fixed.
- New UI > Settings > Project Templates >Duplicate action was not working. This was fixed.
- New UI > There was an issue in saving changes for proposal builder. This was fixed
- New UI > The filter panel would disappear after filters were applied in CRM Follow up. This was fixed.
- Auto Logout > In a multi-tab situation, this feature will not perform as expected. This was fixed.

VERSION 1.1.193 RELEASED ON MAY 27, 2023

Product Enhancements:

<u>Save and Update named filters across CORE:</u> Now, you can use this powerful feature to quickly review your list view data across more pages: *Payment list*, *Vendor Bills, Statements, Invoice Collections, Vendor Bills, Purchase Orders, Credit Cards, Checks and*

PTO list. We have also added the ability update existing named filters to optimize your previous searches.

"Yesterday" as a date shortcut option: Data throughout the application can now be date filtered for Yesterday. This enhancement will allow you quickly review recent records in-app and in the reporting center.

Clients ePayments made easier: We have enhanced the Invoice ePayments page to alert your clients about any additional unpaid Invoices after they have successfully recorded a payment.

Application Stability:

- Time Entries > Fixed an issue that would cause the Fee Schedule OT multiplier to be used for Cost rates.
- Time Entries > Import CSV now auto populates client hours if they are missing in the CSV
- Time Card > Navigating from Day view to Week View would cause a UI distortion. This was fixed.
- Reviewer > There was issue with the totals for numeric and currency columns when filtering for employee and vendor groups. This was fixed.
- Create Batch Invoice > An issue in code prevented split billing projects from showing up on some occasions. This was fixed.
- API > We have updated Credit Card API to support date filters.
- OT Calculator > Progressive scroll was not working in Overtime calculator view. This was fixed.
- Reports > The Work in Progress Details was not properly loading when applying a specific date filter. This was fixed.
- Reports > The Employee Time Card Summary report was not properly exporting to PDF when certain filters were set. This was fixed.
- Reports > Two Profit and Loss Comparison reports were not properly handling Vendor Bills. This was fixed.
- Reports > When the Contract Analysis report was launched from the Project list, the report was displaying the wrong project dates. This was fixed.
- ePayments > We have updated email and in-app notifications to help customers onboard effectively when signing up for BQE ePayments.
- ePayments > Payment summary page and in-app notification would exclude the pass-through fees that was paid by the client. This was fixed.
- Onboarding > Help and documentation links to the latest links.
- Email > Address book drop down would associate unwanted text to Category labels. This was fixed.

- Invoices >Draft as prefix to invoice number is displayed on invoices migrated from BQ. It was fixed.
- New UI > Page is not redirecting to last visited page when click on the Cancel button in User Settings. It was fixed.
- New UI > Scroll was not working in Term List. It was fixed.
- New UI > Persist Search was not working In GS>Activity/Expense. It was fixed.
- New UI >Settings > There was an issue when updating the Accounts Receivable account. This was fixed

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VERSION 1.1.192 RELEASED ON MAY 10, 2023

Product Enhancements:

Column selector on Project List report: We are excited to introduce the first step in providing users greater control over their reports. The columns displayed on the Projects List report can now be selected and re-ordered to fit your various office needs. Be on the lookout as we continue to roll this out for additional reports

Filter Time Details by Invoice: The Time Details report can now be filtered by Invoice Number. This will give users another dimension to slice up their time records by for easier review.

Save your filters across CORE: Now, you can use this powerful feature to quickly review your list view data across more pages: *Invoice list, Time and Expense entry list, Client list, Employee list and Vendor list views*

Application Stability:

- ePayments >We have updated BQE ePayments onboarding process to minimize creating clones of existing ePayment profiles unless deemed necessary.
- ePayments > The payment page would not clearly show any retainers that might have been applied prior to the Invoice. This was fixed.
- ePayments > We have handled several scenarios (missing accounts, profile settings turned off etc.) that can potentially lead to payment recording failures in the app.

- ePayments > Several customers had been impacted from the missing Expense account for legacy profiles migrated to BQE ePayments. This was fixed.
- Invoices > The Invoice number filter would show an incorrect value when setting up a range filter. This was fixed.
- Reports > If a check record had time and expense associated to multiple projects, the Check Details report was not properly grouping check entries which led to incorrect grouped sub-totals. This was fixed.
- Reports > Group By option labels were cleaned up for consistency across all reports.
- Reports > The General Ledger report was not populating report data if the Show Memo option was enabled. This was fixed.
- Reports > The Project Time Entries report was not properly grouping by Activity Items when that option was selected. This was fixed.
- Reports > The Time Details report was incorrectly pulling the Description of the Activity Code instead of the Activity ID. This was fixed.
- Reports > The Work in Progress Details Report was incorrectly showing Cost Amount in the summary section for users that had this data permission disabled. This was fixed.
- Reports > When an existing Memorized report was edited and re-saved, CORE was incorrectly routing to Scheduled Reports. This was fixed.
- Time Card> We noticed an issue with the recently added re-sizing feature. This was fixed.
- New UI >Activity Items header would scroll away. This was fixed.
- New UI > Wrong message is shown when we duplicate project template. This was fixed.
- New UI > When copying security profiles, users were were navigated to the wrong section of the Security screen. This was fixed.
- New UI> ePayments column does not show up correctly in Projects. This was fixed.
- New UI > Top Navigation to indicate time/ counter of other users timers as well
- New UI > We had added "View All" Documents links under Projects>documents list view.
- New UI > Account payable does not default to the global defined when creating a new vendor bill. This was fixed.
- New UI > On unselecting "All checkbox" security permission screen freezes. This was fixed.
- Invoices > Invoice number values would not show up correctly when applied as a filter to the list view. This was fixed.
- Projects > We have fixed an issue with updating bill rates in Projects> Budget view.

- Projects > There was an issue adding new line item or updating existing item for phase level budget. This was fixed.

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VERSION 1.1.191 RELEASED ON APRIL 26, 2023

Product Enhancements:

Project List Analytics Drawer: This enhancement will streamline a project manager's ability to review important project-specific information directly from the context of their report list without having to navigate to the reporting center or drill into each project. This enhancement is aimed at reducing context switching and improving a project manager's efficiency and productivity in CORE.

Edit Invoice by removing Time and Expense: Billing users can now quickly make updates to existing Invoices by removing time and expense entries within the comfort of the Invoice editor. This enhancement will significantly cut down on the turnaround time for sharing updated invoices with clients.

Save and name T&E Reviewer filters: Now, users can save their preferred filters on the T&E Reviewer easily. This will allow them to apply saved filters with one click to make workflow and other updates for entries narrowed down to their criteria.

Expense entry just got faster: Project and expense dropdowns load faster, allowing users to create expense entries faster than before.

Client Payments made easier: We have enhanced our ePayments page to alert your clients about any unpaid Invoices that have ePayments turned on.

Friendly, contextual Integration sync log: QBO integration has been updated to provide users with easy-to-understand error/validation sync log while syncing payments.

Extended Project Accounting: No need to update late fees invoices accounting to reflect the income account added at the Project level, as we have updated the implementation to use the project income account automatically.

<u>Time Card resizing:</u> We have fixed the position of the done button to make it easy to record entries when the browser is resized. Users can now take full advantage of high-res monitors as Time card now adapts to any browser dimensions.

Application Stability:

- Reports > Report filters were not properly being applied when 50 or more individual records were selected and was affecting reports including Time Details and Contract Analysis. This was fixed.
- Reports > The Employee Time Details report incorrectly displayed the $ symbol on hour specific KPIs in the summary section. This was fixed.
- Time entries > We have rectified an issue with "Comp Time" flagging when it was being earned and used in the same earning period.
- Time entries > The system would incorrectly use the Fee Schedule > Overtime multiplier to populate the cost rate of a time entry when a match was found. This was corrected.
- New UI >All the items in Side Panel now support opening in new tab.
- NEW UI: Can't add dropdown in Custom Form Fields Screen
- New UI >Project Templates missing Structure information. This was fixed.
- New UI: Unable to perform progressive scrolling for Employee/ Vendor in 'Security Permissions '. This was fixed.
- New UI > Adding a new phase in Project Structure will lead to an incorrect error message. This was fixed.
- New UI > Batch updating Fee Schedule > Services/Expenses error was being thrown. This was fixed
- New UI > There was an error when updating start date in 'Recurring Checks'. This was fixed.
- New UI > Budgets > Services/Expense -> Cost Amount and Charge Amount fields are not auto filled when we focus out of the rate and units' columns while making the entry. This was fixed.
- New UI > Resolved an issue with Proposal builder being used in dark theme setting.
- New UI > Creating a new project with same display name and phase description would throw an error. This was fixed.
- Time Card > There was a crash issue introduced for Project filter. This was fixed.
- CRM Campaigns > We have resolved an issue with sending out Campaign emails with "Prospect Company" smart field.
- Documents > Several users had complained about Google drive integration requiring them to repeatedly reconnect to attach documents. This was fixed.

- ePayments > We have fixed an issue with ePayments message settings that did not allow users to turn off the stock message.

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VERSION 1.1.190 RELEASED ON APRIL 12, 2023

Product Enhancements:

Actionable notifications for un-approved Time and Expenses : Users can now review, with one click, all un-approved time and expense entries while creating batch invoices, allowing them to complete their billing cycle faster.

Save time by naming your Project filters: Now, users can save their preferred filters on the project list. Easily apply saved filters with one click to help find the projects users care about quickly.

Create your timers faster: Project and activity dropdowns load faster, allowing users to create timers faster

Faster data entry using Import CSV: Get started with CORE by importing Activity items, Expense items and Payments directly from a CSV source. This functionality is available under "More" menu in respective list view.

Sort Time and Expense: Draft invoices will now allow users to sort their time and expenses in Invoice Editor. This change will be reflected in "Hourly Invoice Custom Ordering" Invoice template as well.

Enter time directly for selected project: Time Card grouping by Project now allows user to add a new row directly in the project group, allowing users to enter time faster as they do not to find and select the project.

ePayments with Pay when Paid: Receive instant alerts to pay vendor payables when receiving ePayment for Invoices that have vendor bill line items.

Friendlier, contextual Integration sync log: QBO Invoice integration has been updated to provide users with easy-to-understand error/validation sync log with project/client/invoice number information added in all scenarios for full context of the underlying reason for sync failures.

Quicker review of Time and Expense memos: The Time and Expenses Detail report generated from the Time and Expenses Reviewer now contains Memos for each record that has one.

Other standard report enhancements to improve data review efficiency and allow more customization:

- The Billing Details report can now be filtered by Billable status, so users can now review their billing information with more refined control
- The WIP Reconciliation report can now be Grouped By either Client, Master Project or Project

Application Stability:

- ePayments > Added checks to prevent duplicate submission of BQE ePayments merchant application.
- ePayments > ePayments page has been updated to allow end clients to pick Country and State from respective drop downs instead of manually entering these values.
- ePayments > Few users had complained that they are receiving duplicate emails after an Invoice was paid by the Client using the ACH method. This was fixed.
- ePayments > We have resolved issues with ACH status being stuck in "Pending" in scenarios when the user turns off pass through charges after the payment had been initiated.
- Expense Entry > Decimal places specified for rate and amounts were not being applied in this view. This was fixed.
- Import CSV > Cloud Feeds import CSV would not notify users of missing values and instead rely on users to click on the notification. This was fixed.
- Invoice Editor >Remediated issue related to single invoice to allow editing of time or expense entry without changing it to a joint invoice.
- Invoices > Users can now paste memo text copied from word documents without any garbled text being introduced.

- Invoices > We have added the "draft" indicator label next to the Invoice number in all table views and drop-downs that show the Invoice number.
- New UI > Compose email tab is not automatically closed once an email is sent. This was fixed.
- New UI > Fee schedules that have created recently did not appear in the list view. This was fixed.
- New UI > Fixed text display issues for: Notes Widgets, Global settings, Email, and memo notes, in Dark mode for New UI. Initially users were not able to view the texts clearly due to color contrast issues
- New UI > On trying to assign a project to fee schedule , the page freezes.
- New UI > The fee schedule list disappears on applying filters.
- New UI > Update New UI to close the side panel as it was not closing when users click anywhere else on the screen
- New UI > User is not navigated to Create Fee Schedule screen when clicks on "Save & Add another" button. This was fixed.
- New UI >Access & Permission: Security Permission: "Back To Security" link navigates user to blank page.
- New UI: Fee Schedules: When user selects and un-selects the "Check all" checkbox, The screen freezes.
- New UI: Indicators of Application suggested Timers is missing. This was fixed.
- NEW UI: The proposal builder in the CRM stays dark and the text does not flip to a lighter color on the builder.
- New UI: We are not able to favorite the Project Assignments screen. This was fixed.
- Projects > Updated project status change notification link CTA to open the project in a new tab.
- Security > Few users complained that after clicking "Back to Security", Security Permissions screen wasn't navigating back to Security Permission list view and a blank page was getting displayed
- Security > Fixed security permissions issues to allow user to edit Project Note's tab under a Project's page.

VERSION 1.1.186 RELEASED ON FEBRUARY 17, 2023

Product Enhancements:

New UI

- Navigation items now have labels visible at all times to help users find the correct module faster
- Increased the number of allowed favorites from 10 to 18; users can now favorite more of the things they access most frequent organized in one area for quick access

Project Improvements

- A new project status "Draft" has been added; users can now create projects that are in the early planning stages and are not yet active, without impact on invoicing, T&E, reports workflows
- The project status is now available on the Project List as well as on the Project page; users can now make changes to the project status quickly and easily
- Users can now select to assign a budget template to their project or start a new budget from scratch

Report Enhancements:

- Reports > Access powerful context driven reports by using the newly added "View Reports" function added to Project row caret menu.
- Reports > Drill down for "Monthly Profit and Loss Accrual" and "Balance Sheet Cash Basis" reports have been enhanced to include Project, Vendor and Payer columns.
- Reports > We have added enhanced filtering and grouping by City and State to the "Tax Tracking" report

Billing and ePayment Enhancements:

- ePayments > Based on customer feedback, we have made changes to the payment summary section of the ePayments page to better highlight the amount to be paid.

Other Enhancements:

- Import CSV > We have updated the error handing and validation in "Cloud Feeds" to be more intuitive and consistent with others areas of the application.

Application Stability:

- Create Batch Invoice > Late fee invoices are considered to be part of contract amount when billing is done using percent complete in contract analysis widget of project. This was fixed.
- ePayments > An issue with our help system had caused the "Learn More about BQE ePayments" link to break. This was fixed.
- ePayments > Few users had complained that payment notifications were not being delivered in case of Statement payments. This was fixed.
- ePayments > We have fixed an issue related to the partial payments setting in ePayments profile being modified after ePayments was scheduled.
- ePayments > We have fixed few issues with editing of scheduled payments.
Help > We have fixed an issue with the help links that are accessible from the help menu pop up.
- New UI > Resolved the issue to view Expense Entry screen under favorite after the page is added to favorites
- New UI > Resolved the issues with closing the side panel when user clicks anywhere on the page.
- New UI >Resolved issues that prevented users from making the main Notes and To-dos screen as favorites.
- New UI >Resolved the issue related to adding a new line item under fee schedule
- New UI >Resolved the Object Reference errors when finalizing any draft invoice
- Notifications > Updated the text for Notifications
- Power BI Connector > Fixed an issue with the "Contact" table.
- Reports > "Work In Hand" report would crash upon multiple drill down actions. This was fixed.
- Reports > Fixed an issue with abbreviated footnote for "Contract Analysis" report.
- Reports > Fixed an issue with the hours column displaying as currency in "Project Performance" report.
- Timecard > Reverting the change related to auto save new row of Timecard

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VERSION 1.1.185 RELEASED ON FEBRUARY 01, 2023

Product Enhancements:

- Auto Logout >Admin users can now set up automatic logout based on logged users (in)activity monitoring.
- Import CSV >Vendor records can now be bulk imported to CORE by uploading a .csv file.
- Public API > We have added webhooks support for Time entry workflow changes.

Application Stability:

- Data export > CSV files from the Time and Expense Reviewer, Invoices, and Vendor Bills screens were not properly exporting if the Approved By field has a comma punctuation. This was fixed.
- ePayments > Recent change in payment notifications had introduced an issue that would lead to blank notifications when receiving ePayments. This was fixed,
- ePayments > We have fixed an issue with partial payment of Statements.
- Login > We have fixed an issue with incomplete 2FA set up.
- New UI > There was an issue related to "Groups" security in the new UI. This was fixed.
- New UI > Add On global settings would show up even if there were items under it. This was fixed.
  Projects > The drill down Contract Analysis report was not properly displaying report information for Main projects. This was fixed.
- Reports > The 1099-MISC report was displaying error codes in some scenarios. This was fixed.

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VERSION 1.1.184 RELEASED ON JANUARY 21, 2023

Product Enhancements:

Edit finalized Invoices:

- Users can now edit finalized Invoices using the Invoice editor interface. This new capability will allow billing users to change Invoice attributes like Terms, Billing

address, Discounts etc. or make changes to the associated Time and Expense entries without the need to recreate the Invoice again from scratch.

Import Phased Projects in bulk

- We have made it easy to import Projects and associated Phases at the same time using our Project CSV import feature.

Analytics enhancements:

- The most used report in CORE, the Time and Expenses report, has been enhanced to allow up to three levels of grouping. The enhanced grouping options will be available on any standard instance of the Time and Expenses report including Standard, Memorized, Favorite or Scheduled tabs. The re-organized records will allow users to review their data more efficiently.
- "Tax registry" and "Taxes" reports were both enhanced to for more robust filtering and grouping options.
- Additional information has been added to the Transaction Details report including the Project, Vendor and Payer details.

Integrations:

- Updates to QuickBooks Desktop Sync Utility

Performance Optimizations:

- Back end improvements for faster processing

Application Stability:

- Create Batch Invoice > An issue in the Create new Manual Invoice from Approved T&E would bring in entries outside the dates provided by the user. This was fixed.
- CRM Proposals > We have fixed an issue with the Proposal view that would cause it to lose some changes after saving.
- ePayments >The system would not allow partial payment of ePayments enabled Statements in some cases, This was fixed.

- New UI > Timer totals were not updating if there were one more timers running. This was fixed.
- New UI > We have fixed an issue with create batch Invoice screen sub totals.
- New UI > We have restored access to view all notes setting that was missing in the new interface.
- New UI> We have fixed an issue in Settings page that had made the LEDES setting inaccessible.
- T&E Reviewer >an issue in T& E reviewer would prevent cause the "Mark Billed" action to update the first 75 records only. This was fixed.

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VERSION 1.1.183 RELEASED ON JANUARY 04, 2023

Product Enhancements:

New UI:

- Users can now add shortcuts for their favorite settings by marking them as "Favorites".
- We have made it easier for Foundation, Billing and Accounting subscription users to access Purchase Order and Vendor Bill modules. These are now conveniently located under Accounting->Payables menu.

Time Card Improvements:

- We have updated the add new row experience to be consistent with our other areas of the application. Users will be presented with a DONE button to complete adding a new time card row.

Data Onboarding:

- Employee records can now be bulk imported to CORE by uploading a .csv file.
- Enhanced error handling for Prospect and Leads CSV import

Reporting improvements:

- Reports > When drilling into the details of a Profit and Loss Cash Basis report, the underlying report will now include the Project, Vendor and Payer details as well.

ePayments:

- Updates to BQE ePayments- Automatic deposit recording w/ settled fees. (limited release)
- ePayment email notifications will now include Invoice, Project and Client information.

Budget improvements:

- Users can now turn on custom fields for Budgets list view.

Integrations:

- Updates to QuickBooks Desktop Sync Utility

Performance Optimizations:

- Back end improvements for faster processing

Application Stability:

- A&F > We have fixed an issue that would prevent time entry hours that do not any corresponding allocation from appearing under "Other Tasks".
- Expense Entry > There was an issue with the total record count if expense entries had more than one custom fields specified.
- Integration > Many users had complained about their Google Calendar appointments not appearing after setting up the integration. This was fixed.
- Invoice Editor > There was an issue with Net Bill calculation not being updated when modifying time entries. This was fixed.
- Invoice Editor > Unsaved changes would be lost when including approved time entries. This was fixed.
- Invoices > Users were not able to update Invoice Numbers for finalized Invoices. This was fixed.

- Invoices > We have fixed an issue with email attachments for One Drive/DropBox documents.
- Leads > There was an issue with import sample CSV for leads. This was fixed.
- New UI > There was an issue with custom fields list view when deleting existing records. This was fixed.
- New UI > There was an issue with the Class list view display. This was fixed.
- New UI > We have enhanced the hover and active states for left nav. menu items.
- Projects > All tabs in Project details section are misaligned if the Project name was over a certain length. This was fixed.
- Time Card > The Day view interface would not reveal the full contents of the memo when clicking on the memo box. This was fixed

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VERSION 1.1.182 RELEASED ON DECEMBER 22, 2022

Product Enhancements:

- Time and Expense entry Improvements:
    - Within the Time Card week view, there is now a button that will allow you to submit all time entries for the current period.
    - When you submit your time card, CORE will now remember the previous settings that you used.
    - Time Card has been updated to show the time stamp of the last update to the Time Card view.
    - Time Entries page has been updated to sort by custom fields.
- New UI
    - User profiles now allow for adding a profile picture.
    - We have added contextual help links for Global and User settings pages.
- Subscription Management
    - Premium Yearly Support Plan can be added as Company level subscription.
    - We are rolling out updated pricing for Foundation package.
- Reporting Improvements:

- o When drilling into the details of a Balance Sheet Accrual Basis report, the underlying report will now include the Project, Vendor and Payer details as well.
- o New filters have been added to the Personal Time Off Usage report, including: Employee, Vendor, and Vendor Group.

Application Stability:

- New UI > Fixed security access issue with Company> Documents tab.
- New UI > The first record would get un-selected after all records were selected and then the user clicked on the description field of any record in the T&E reviewer
- New UI > There was an issue with remembering filters for Time entries view. This was fixed.
- New UI > There was an issue with scrolling after the user responded to the unsaved changes prompt. This was fixed.
- New UI> Project Assignments would stop at 25 records. This was fixed.
- OT Calculator > The system would keep reverting Regular and OT hour settings entered by the user. This was fixed.
- Time Card >Fixed a bug where the time card view switches from the week view to the day view automatically.
- Time Entries > When creating an Employee from the Add New button in the Time Entry screen, the Auto Approve Time for Employees Global Setting is not respected. This was fixed.

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VERSION 1.1.181 RELEASED ON DECEMBER 8, 2022

Product Enhancements:

- Import CSV > We have optimized data validation and error/success messages when importing Projects, Time and Expense entry and General Journals.
- Invoices > We have added the ability to launch statements directly from the Invoice record.

- Projects > Users can now launch the Contract Analysis report for a project from the Projects list screen by clicking on a project's Contract Amount.
- Reports > When drilling into the numbers on the Profit and Loss Accrual Basis, the underlying Transaction Details report will now display the Project, Vendor and Payer details as well.
- Reports Center > The reporting center search bar has been enhanced to display suggestions across all report tabs.
- Subscription Management > Added the ability to renew Foundation subscriptions.
- Time Card > New users will have the approval status flags turned on by default.

Application Stability:

- Import CSV > There was an issue with importing contacts for Client, Vendor and Employees. This was fixed.
- Import CSV > There was an issue with importing start and stop time for time entries. This was fixed.
- Invoices > Processing late fees in bulk would complete for the first 75 selected Invoices only. This was fixed.
- Invoices > Updating memo or description for entries tied to a draft Invoice would reset the WUD factor. This was fixed.
- New UI > Fixed an issue with select all checkboxes in Currency Manager.
- New UI > Invoice number under recent Invoices was not getting updated to modified Invoice number. This was fixed.
- New UI > Invoices that had been deleted would still hold a reference under the "Recent Invoices". This was fixed.
- New UI > There was an issue in Project Groups> Assign Project. This was fixed.
- New UI > There was an issue with QBO Sync> Record mapping when loading more records. This was fixed.
- New UI > There was an issue with showing existing data for Notes categories, classes and contact methods. This was fixed.
- New UI > There was issue with saving Accounting settings from the Settings area. This was fixed.
- New UI > We have relocated "Auto Approve" settings under Project.
- New UI > We have restored access for Project assignments by adding "View Assignments" action under Project details>More.
- New UI > We have restored access to OT Calculator from Time entries and Time Card views.

- OT Calculator > The system would not take the "Excluded Activities" setting into consideration when processing over time for the selected employees and time period. This was fixed.
- OT Calculator> The Select All feature would select the visible rows only. This was fixed and made consistent with other list views.
- Projects > Emailing budgets directly from the Budgets tab would attach an empty PDF. This was fixed.
- Reports > In some cases, when the Employee Expenses report was exported as a CSV, some row data was not exported correctly. This was fixed.
- Time Entries > There was an issue with showing more than one custom field of the same type. This was fixed.

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VERSION 1.1.180 RELEASED ON NOVEMBER 23, 2022

Product Enhancements:

- App Navigation and UI Update (Open Beta): This update adds several enhancements like Dark mode support and fixes numerous known issues.
- Reports > Several new filter options were added to the Employee Time Card Summary report including Project Status, Project Type and Project Contract Type.
- Dashboard > Clicking into PTO records from the Workflow dashboard widget will now re-direct users to the PTO screen.
- Report Center > Search bar in the report center has been enhanced with autocomplete suggestions to make finding your data faster and easier.
- Security Optimizations > This update further improves the security posture of the Application.

Application Stability:

- Integrations > QBO sync would throw an error if the logged user was missing the custom label security permission. This was fixed.
- Integrations > There was an issue with selecting all Calendars created in Office 365. This was fixed.

- Invoice Templates > Sample Invoice previews were not properly generating. This was fixed.
- Invoices > Draft Invoice Editor UI would show draft invoice number instead of actual invoice number. This was fixed.
- Projects > The Budget ID field would be left empty when custom budget was being used for the project. This was fixed.
- Reports > The Historic Billing report was not properly honoring Fiscal Year date filters when the default fiscal year did not coincide with calendar year end. This was fixed.
- Time entries > When creating a time entry from a timer, the 'amount' field would not show the correct amount unless updated from the Time entries view. This was fixed.

VERSION 1.1.179 RELEASED ON NOVEMBER 10, 2022

Product Enhancements:

- App Navigation and UI Update (Beta): This update adds several enhancements and UI fixes for many known issues.
- Client records can now be bulk imported to CORE by uploading a .csv file.
- BQE ePayments onboarding has been enhanced to allow users to turn on ePayments links for all open and draft state invoices at the time of Merchant Sign up.
- Time and Expense Entries >We are now saving column width for the 'Best Fit' option.

Application Stability:

- Billing > There was an issue in the late fee calculation for specific month ending scenarios. This was fixed.
- Dashboards > The HR benefits calculations have been updated for the Paid Time Off and Comp Hours widget and Benefits Usage report, so the values match.
- Expense Entries > Users were not able to attach documents when creating new entries if the auto approve Expense rule was turned on. This was fixed.

- Projects > Handled crash error in Expense list of Budgets tab when 'Include Phases' was turned on.
- Reports > In certain scenarios, created vendor bills would create an imbalance on the Balance Sheet Cash Basis report. This was fixed.
- Reports > In certain scenarios, joint invoice payment breakdown were not matching on the Payment Details report. This was fixed.
- Reports > The Parent Project name was not being properly displayed when date filters were being applied to the Time and Expenses by Parent Project report. This was fixed.
- Time and Expense Reviewer > Applying filters and sorting the reviewer list would sometimes result in incorrect number of records to be exported to CSV format. This was fixed.
- Time Entry > It would require several tries to update the memo field for an existing entry. This was fixed.

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VERSION 1.1.178 RELEASED ON OCTOBER 25, 2022

Product Enhancements:

- App Navigation and UI Update (Beta): This release rolls out navigation and UI changes to select beta customers.

Application Stability:

- Dashboard > Employee filter in the 'HOURS' widget was not showing Vendors even if the setting 'Include vendors in the employee drop-downs' was checked in the User Preferences. This was fixed.
- Dashboard > HOURS widgets was including weekend hours. This was fixed.
- Invoice Templates > Manual Invoice templates were not using the correct rate multiplier when previewing Invoices created for a Project with non-US currency. This was fixed.

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VERSION 1.1.177 RELEASED ON OCTOBER 12, 2022

Product Enhancements:

- Invoices > Parent Retainer Available information has been added to Phased Invoices Retainer Summaries.
- Reports > The Employee Expenses report has been updated to improve readability and it was optimized for better performance. The report can now be grouped by Expense Item.
- Reports > The Percentage Billed report can now be grouped by Project Manager.

Application Stability:

- Budgets > Users with read only permission were not able to add new line items. This fixed.
- Budgets > We have fixed a UI issue that would distort the table if all columns were made visible.
- Integrations > There was an issue with Office 365 integration that would prevent Outlook events Calendar to show up in full calendar view. This was fixed.
- Payments > An isolated issue with payments screen would prevent loading of more than 75 records. This was fixed.
- Scheduled reports > Time verification scheduled reports were not being sent out properly if their schedule was modified. This was fixed.

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VERSION 1.1.176 RELEASED ON SEPTEMBER 28, 2022

Product Enhancements:

- Projects can now be bulk imported to CORE by uploading a .csv file.
- Pricing Update> This update rolls out new pricing for CORE subscriptions effective immediately.

- Reports > More filters, including Project Status and Principal, have been added to the Cash Receipts report. The report has also been optimized for improved performance and readability.
- Reports > More filters, including Project Status and Principal, have been added to the Employee Paid Time Off Hours report. The report has also been optimized for improved performance and readability.
- Reports > The Client Transactions report can now be grouped by Master Project.
- Reports > The Time Details report can now be grouped by Project Manager.
- Integrations> "Connect" buttons have been refreshed for new styling.
- Security Optimizations > This update further improves the security posture of the application.

Application Stability:

- Batch Invoice > There was an issue with retainer amount calculated for the Invoice when one or more entries were excluded from the Invoice. This was fixed.
- Batch Invoice > Users had reported issues processing Invoices using Project Filter Option in combination with Percentage based billing. This was fixed.
- Expense Entry > Time and Expense subscription users were not able to use the Credit Card field when creating a new Expense entry. This was fixed.
- General Journals > An issue with the Import CSV was preventing users to import entries from CSV source. This was fixed.
- Subscription Management > Some users would not get subscription renewal notifications while logging in during the grace period. This was fixed.
- TE Reviewer > The system was not updating "Paid Date" when paid flag was removed. This was fixed.
- Vendor Bills > There was an issue with the Batch update feature when used in conjunction with quick list view search. This was fixed.
- Reports > The Project Time Entries was not properly honoring security bits for subtotal amounts. This was fixed.

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VERSION 1.1.175 RELEASED ON SEPTEMBER 14, 2022

Product Enhancements:

- Time Card > Time Card interface has been enhanced to allow users to group their time entries by Project.
- BQE ePayments > Automatic bank deposits have been reworked to match the real-world bank transfer events. This feature will be made available to selected customers for testing before full roll out.
- Invoice Editor > Labels in the Invoice Editor screen have been updated to properly refer to Phase or Project sections.

Application Stability:

- Expenses > Creating a copy of an expense entry was not retaining the correct charge amount. This was fixed.
- Integrations > An issue with AccountRight integration was preventing users from syncing Projects/Invoices along with the sync settings page being not accessible This was fixed.
- Integrations > Dropbox storage users were unable to upload documents to Projects or Vendor Bills. This was fixed.
- Invoice Editor > The call-to-action buttons disappeared from the invoice editor screen when we DELETE, SEND TO and PRINT actions were used from Action menu. This was fixed.
- Invoices > The View Transactions link in a finalized invoice details screen was linking to a blank Payments list. This was fixed.
- Reports > CORE Express Plus users were not able to see all financial reports. This was fixed.
- Reports > The Report Center was not properly displaying all reports under some categories. This was fixed.
- Scheduled Reports > Several users had complained about reports being emailed even after their CORE subscription had expired. This was fixed.

VERSION 1.1.174 RELEASED ON AUGUST 31, 2022

Product Enhancements:

- Invoice Editor > Newly approved time and expense records can now be added to draft invoices using the Invoice Editor.
- Time Card > The Time Card activity drop down has been optimized for better performance.
- Reports > The "Write Up Write Down" report has been optimized for better performance.
- Reports > The "Trial Balance Cash YTD" report has been optimized for better performance.
- Reports > The "Trial Balance Accrual YTD" report has been optimized for better performance.
- Reports > More filter options have been added to the "Employee Project Utilization" report and its readability has been improved.
- Reports > More filter options have been added to the "Account Reconciliation" report and its readability has been improved.
- Invoices > The user experience for re-directing to the Payments screen from Invoices has been enhanced to avoid loading a blank screen if no payments have been made.

Application Stability:

- Batch Update > Batch updating projects from a filtered list would result in all project records being incorrectly updated. This was fixed.
- Dashboard > A security bug was not allowing the proper data to load in the "Paid Time Off and Comp Hours" widget. This was fixed.
- Global Search > The global search box was not properly displaying recent searches. This was fixed.
- Integrations > Certain users were unable to send Invoices to Xero. This was fixed.
- Invoice Editor > Edits made to an Expense's Extra attribute were not being properly saved. This was fixed.
- Invoice Editor > Split Draft Invoices were not properly loading in the Invoice Editor. This was fixed.
- Invoice Templates > Users were incorrectly given permission to delete Custom Invoice Templates from Global Settings. This was fixed.
- Manual Invoices > Manual Invoices could not be created for Projects with certain rules set. This was fixed.
- Reports > On drill down, the "Account Reconciliation" report uncleared totals did not match. This was fixed.

- Reports > The "Time and Expense" report was incorrectly calculating the Grand Total Billable Service / Expense by including non-billable amounts. This was fixed.
- Reports > The summary section of 'Monthly Financial Budget vs Actual' report was not formatted correctly. This was fixed.

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VERSION 1.1.173 RELEASED ON AUGUST 17, 2022

Product Enhancements:

- Reports > "General Ledger Cash Basis" report has been optimized for better performance.
- Reports > "Payment Details" report has been enhanced to improve readability and new filter options have been added.

Application Stability:

- Dashboard > The Paid Time Off dashboard widget was displaying the wrong Used values. This was fixed.
- Global Settings > Changes to tax rates in global settings were not being properly updated throughout the application. This was fixed.
- Integrations > Invoiced were not properly syncing from CORE to MYOB. This was fixed.
- Integrations > When syncing invoices to QuickBooks, the Net Terms were being incorrectly set at the Client level instead of the Project level. This was fixed.
- Invoices > Invoices were not sending to Client Contacts without viewing a Preview of the Invoice. This was fixed.
- Reports > "Profit and Loss by Class Cash Basis" report numbers were not matching the drill down report when applying a Transaction date filter. This was fixed.
- Reports > "AR Aging 8 steps" report was failing to preview and email for large data sets. This was fixed.

- Reports > "Time Details and Contract Analysis" reports could not be opened from email attachments when a scheduled report was run to deliver them. This was fixed.
- Reports > "Work In Progress Detail" report was duplicating entries if more than one Project Group was assigned to a Project. This was fixed.
- Security > Users that had a custom security profile assigned were able to run assigned reports, but the reports would not display any data. This was fixed.
- Time & Expense > The Time Entry, Expense Log and Reviewer screens were not properly applying the un-approved filter. This was fixed.
- Time Card > The Overtime splitting feature in the Time Card was not properly splitting Overtime entries for billable work. This was fixed.
- Time Entries > Billed Time Entries were not correctly enforcing restrictions that prevented updates. This was fixed.
- Vendor Bills > Time Entries on paid Vendor Bills could incorrectly be updated which would result in incorrect cost amounts. This was fixed.
- Vendor Bills > Updating units on a saved Vendor Bill was not properly updating client hours in the Time Entry record. This was fixed.
- Vendor Bills > When a Vendor Bill is created using existing Time Entry records with custom memos, the custom memos are not properly imported. This was fixed.
- Time Card > Clicking tab after entering a time entry was not properly saving the entry. This was fixed.

VERSION 1.1.172 RELEASED ON AUGUST 3, 2022

Product Enhancements:

- Invoice Editor > The Invoice Editor experience has been enhanced by enabling the editing of linked Expense Entries on a Draft Invoice.
- Invoice Editor > The Invoice Editor user experience has been simplified.
- Invoices > Phased Invoice templates have been updated to include a Retainer Summary if the option is enabled.

- Time Card > The Project dropdowns in the Time Card have been optimized for better performance.
- Bill Payments > Bill Payment details view has been updated to accommodate longer Reference Number values.
- Reports > The Budget Comparison report has been optimized for better performance.
- Reports > The Cost Analysis report has been optimized for better performance.
- Reports > The Monthly Billing Statement report has been optimized for better performance.
- Reports > The Project List report has been optimized for better performance.
- Reports > The Project Performance report has been optimized for better performance.
- Reports > The Project Profitability report has been optimized for better performance.
- Reports > The Trial Balance Cash Basis report has been optimized for better performance.

Application Stability:

- Bill Payments > When creating a Bill Payment by Saving and Adding Another, the Payee filter was not being honored and the list would display all Vendors. This was fixed.
- General > "This Bi-Weekly" date period was inconsistently referred to throughout screens and reports. This was fixed.
- Invoices > Hours on the cover page were incorrectly multiplied by the number of payments received for the Invoice. This was fixed.
- Invoices > Late fees were incorrectly being considered part of the contract amount when using percent complete billing. This was fixed.
- Projects > When a Project filter was applied to the Projects list, then the list was sorted by Project, some Projects were incorrectly listed as duplicates in the list. This was fixed.
- QuickBooks > In some instances, Invoice Class was not properly syncing to QuickBooks. This was fixed.
- QuickBooks > Invoices created from Billable expenses that were tied to accounts in QBO were not transferred to CORE. This was fixed.
- QuickBooks > Searching keywords against Unmapped Payments in QuickBooks was not yielding the correct results. This was fixed.
- Reports > Column headers were missing from Page 2 of the Employee Profitability Report. This was fixed.

- Reports > Deposits made through New Funds were not properly reflected on any AR Aging reports when the General Journal option is turned on. This was fixed.
- Reports > The Vendor Bills Paid report was incorrectly including records for Unpaid Vendor Bills. This was fixed.
- Reports > When exporting the Expenses by Vendor report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Reports > When exporting the Journal report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Reports > When exporting the Project List report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Reports > When exporting the Unpaid Vendor Bills report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Time Card > Clicking tab after entering a time entry was not properly saving the entry. This was fixed.

VERSION 1.1.171 RELEASED ON JULY 20, 2022

Product Enhancements:

- Invoice Editor > Expense Entry details can now be updated directly from the
- Invoice Editor.
- Invoices > Users can now filter the list by Invoice Created On date.
- Reports > "General Ledger" and "General Ledger Extended" reports have been optimized for better performance.
- Dashboard > "Paid Time Off and Comp Hours" widget has been updated to handle the advanced benefit rules.

Application Stability:

- Account Management > An issue with the reset password mechanism would lock out few users after they had changed their password. This was fixed.
- Checks > The screen would become unresponsive when associating existing expenses for the selected Payee. This was fixed.
- Dashboard > Vacation and Sick time were not reflecting in Paid Time Off and Comp Hours widget. This was fixed.
- ePayments > An issue with phone number formatting was preventing few users from completing the Merchant Sign up in one go. This was fixed.
- ePayments > ePayment status for Partial Payments would still refer to the payment method used in the first transaction. This was fixed.
- Integrations > Users would lose search results when matching records in the record mappings for QBO. This was fixed.
- Invoice Editor > Updates to custom fields linked to T&E items were not being saved. This was fixed.
- Reports > "Tax Registry" report would show incorrect tax amounts in case of Joint Invoices. This was fixed.
- Reports > An issue with the "Hide Phases" option would cause the report to not calculate client hours and other fields correctly. This was fixed.
- Reports > When exporting the Aged WIP with AR report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Reports > When exporting the Check Details report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Reports > When exporting the Employee Allocation Units report as an Excel file calculation could not be run on certain number fields due to their format
- type. This was fixed.
- Reports > When exporting the Employee Half Monthly Time Card report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Reports > When exporting the Statement by Client (Accountant) report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Security > Several fixes were added to harden the security profile of the application.

VERSION 1.1.170 RELEASED ON JULY 06, 2022

Product Enhancements:

- BQE ePayments is now available for US companies that subscribe to our billing module. Users can now sign up for this service using in-app Merchant onboarding and start accepting payments immediately after getting approved.
- Invoice Editor > Time Entry details can now be updated directly from the Invoice Editor.
- Invoice Templates > Retainer summaries have been added to Joint Invoice Templates.
- Reports > New filter options have been added to the Project Time Entries report and it has been optimized for better performance.
- Reports > The Time Details report has been optimized for better performance.
- Reports > The Trial Balance Accrual report's UI has been updated to improve readability and its performance has been optimized.
- Time Card > The Description column was made to be an optional column that is displayed by default.
- Time Card > The Time Card has been optimized for better performance.
- Time Entries > The memo for an entry displayed in the Time Entries screen was updated to fill out the Memo column depending on how wide or narrow the column gets expanded.

Application Stability:

- ePayments > Partial ACH payments made on an invoice would restrict future partial payments to be made only in ACH and not credit cards. This was fixed.
- ePayments > Phone number formatting was not properly reflected when emailing ePayment invoice.
- ePayments > Cash Receipt has been restored as default template for attachments on ePayment emails.
- Integrations > Taxes were not syncing to the proper accounts when connecting to QuickBooks. This was fixed.
- Invoice Editor > Custom field updates were not saving for Time Entry details from the Invoice Editor. This was fixed.
- Project Templates > The Start and End dates in Project Templates were not properly following the defined pattern when creating a new Project. This was fixed.

- Reports > Penny issue discrepancy between P&L and General Ledger Accrual reports has been fixed.
- Reports > When exporting the Activity by Project report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Reports > When exporting the Billable Work History report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Reports > When exporting the Budget Comparison report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Reports > When exporting the Employee Paid Time Off Comparison report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Reports > When exporting the Employee Performance report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Reports > When exporting the General Ledger Extended report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Reports > When exporting the Invoice Register report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Reports > When exporting the Top N Clients report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Reports > When exporting the Transaction Details report as an Excel file, calculations could not be run on certain number fields due to their format type. This was fixed.
- Security > 2FA verifications were being sent to the wrong company emails. This was fixed.
- Time Entries > Rates by Classification were not properly honored when entering time. This was fixed.

VERSION 1.1.169 RELEASED ON JUNE 22, 2022

Product Enhancements:

- T&E Reviewer > Users can now instantly see subtotals for selected records in the T&E Reviewer screen.
- Batch Invoices > We have updated the way the invoice date is interpreted for recurring type projects. The new approach will allow users to include approved time and expenses, independent of the invoice date.
- BQE ePayments beta: This update adds the ability to schedule invoice and statement payments.
- Reports > We have optimized the "Time Verification" report for faster load times.

Application Stability:

- Billing Schedule > Scheduled Amount was being reset to $0 when a project's Contract Type field was updated. This was fixed.
- BQE ePayments beta: We have fixed an issue with ACH transfers that would cause the Invoice to be flagged as ACH Success on payment capture.
- BQE ePayments beta: We have fixed an issue with ePayment methods not being automatically associated with new and draft invoices.
- BQE ePayments beta: We have updated the message included in emails sent to merchants during the onboarding process.
- Dashboard > An issue in the "Staff Workload" widget was causing a mismatch between this widget and the associated report. This was fixed.
- Integrations > The Project Group filter was not working when sending over invoices to QBO. This was fixed.
- Invoice > Duplicate emails were being sent for the same invoice. This was fixed.
- Project Template > To-do dates were incorrect when project was created from a template with existing To-dos. This was fixed.
- Reports > The Account Reconciliation' report was not showing subtotals and drill down for uncleared transactions. This was fixed.
- Time Card > There was a UI issue when pre-filling more than 45 Project/Activity combinations. This was fixed.
- Time Card > Time Card row suggestions were not showing when tasks were allocated to an employee group. This was fixed.
- Time Entries > The "Memo Flag" column was not showing the correct status when a memo was present for an entry. This was fixed.

VERSION 1.1.168 RELEASED ON JUNE 8, 2022

Product Enhancements:

- BQE ePayments > Enhancements have been added to the BQE ePayments beta including a more integrated merchant sign-up experience and a few other important fixes.
- ePayments > The Stripe and AffiniPay on-boarding experiences have been enhanced to match the newly updated flow.
- Projects > When navigating to a different phase within a project's details, the user is now dropped into the same tab they are already on instead of always returning them to the Details tab.
- Reports > The Invoice Register report has been optimized for better performance and new filters have been added.
- Reports > The Project Time and Expense report has been optimized for better performance and new filters have been added.
- Reports > The Time and Expenses by Parent Project report has been optimized for better performance and new filters have been added.
- Time Card > Suggested Time Card rows based on allocated projects/tasks were not always displayed in the Time Card if the allocation dates only lasted for a portion of a week. This was fixed.

Application Stability:

- Cloud Feeds > Cloud Feeds was incorrectly noting that entries had already been matched when trying to "Find Match" for multiple transactions. This was fixed.
- ePayments > The ePayments Details report was not accurately displaying payment statuses for payments that were previously deleted then repaid. This was fixed.
- Integrations > Projects were incorrectly being created in CORE when syncing payment data from QuickBooks Online. This was fixed.
- Integrations > Trying to send invoices to QuickBooks in a batch was not properly sending all invoices. This was fixed.
- Projects > Users were incorrectly getting a permissions error when trying to view Project details for certain records. This was fixed.
- Reports > The ePayment Details report was incorrectly displaying Payment type when paying with credit card. This was fixed.
- Reports > When exporting the Balance Sheet Accrual report as an Excel file, numbers were exported as text and not number format. This was fixed.

- Reports > When exporting the Balance Sheet Cash report as an Excel file, numbers were exported as text instead of number format. This was fixed.
- Reports > When exporting the Billing Analysis report as an Excel file, numbers were exported as text instead of number format. This was fixed.
- Reports > When exporting the Billing Details report as an Excel file, numbers were exported as text instead of number format. This was fixed.
- Reports > When exporting the Employee Paid Time Off Hours report as an Excel file, numbers were exported as text instead of number format. This was fixed.
- Reports > When exporting the Employee Utilization report as an Excel file, numbers were exported as text instead of number format. This was fixed.
- Reports > When exporting the General Ledger Cash report as an Excel file, numbers were exported as text instead of number format. This was fixed.
- Reports > When exporting the General Ledger report as an Excel file, numbers were exported as text instead of number format. This was fixed.
- Reports > When exporting the Personal Time Off Usage report as an Excel file, numbers were exported as text instead of number format. This was fixed.
- Reports > When exporting the Project Account Details report as an Excel file, numbers were exported as text instead of number format. This was fixed.
- Reports > When exporting the Project Performance report as an Excel file, numbers were exported as text instead of number format. This was fixed.
- Reports > When exporting the Work in Hand report as an Excel file, numbers were exported as text instead of number format. This was fixed.
- Reports > When exporting the Work in Progress report as an Excel file, numbers were exported as text instead of number format. This was fixed.
- Scheduled Reports > Scheduled reports that had a custom field filter applied and were updated failed to send. This was fixed.

VERSION 1.1.167 RELEASED ON MAY 25, 2022

Product Enhancements:

- BQE ePayments: This update adds the beta version of our enhanced ePayments processing capabilities. The current release will be available to select few users.
- UI improvements in ePayments Set up and Profile Management.
- Dashboard > The Due Projects widget has been updated to sort by "Due Date".
- Reports > The Employee Time Details report was optimized to load faster and not freeze when applying filters.
- Reports > The Monthly Profit and Loss Accrual Basis report Excel export has been updated so numerical values export in number format instead of text format.
- Reports > The Trial Balance Accrual Basis report Excel export has been updated so numerical values export in number format instead of text format.
- Reports > The Account Transactions report Excel export has been updated so numerical values export in number format instead of text format.
- Reports > The Employee Time Detail report Excel export has been updated so numerical values export in number format instead of text format.
- Reports > The Time Card Week View report Excel export has been updated so numerical values export in number format instead of text format.
- Reports > The Time Card Week View report has been optimized for better performance.
- Reports > The Employee Time Card Summary report has been optimized for better performance.
- Reports > The AR Reconciliation report was optimized to include missing filters options and load faster when applying filters.

Application Stability:

- Batch Billing > During the batch billing process, the Time and Expenses report was not properly generated to reflect unapproved entries. This was fixed.

- Batch Billing > In some instances, there were duplicate invoices being created when using the batch billing process. This was fixed.
- Integrations > Projects were not properly syncing to MYOB. This was fixed.
- Cloud Feeds > In certain scenarios, cloud feeds pulled from third party sources were being duplicated. This was fixed.

VERSION 1.1.166 RELEASED ON MAY 11, 2022

Product Enhancements:

- Invoices > The Invoices list screen can now be sorted using the Created-On column.
- Reports > The Contract Analysis report has been optimized for better performance.
- Reports > The Gross Margin Real Time report has been updated to include additional information.
- Reports > The Work in Hand report layout has been updated to improve readability and the performance has been optimized.

Application Stability:

- Batch Invoice > Available Project Retainers were not being displayed correctly during the Create Batch Invoice process when there was no Project filter specified. This was fixed.
- Reports > The Time Details Report was not calculating amount/hours correctly when filtering by multiple client groups. This was fixed.
- Outlook integration > Some users were unable to sync all their Outlook events to CORE. This was fixed.
- Employees > Payroll related actions were incorrectly showing up in employee screen action menus. This was fixed.
- ePayments > Previewing the "Statement" report from the Payment portal, the system would not consider the filters that were associated with the Statement report that shared with the Client. This was corrected.

VERSION 1.1.165 RELEASED ON APRIL 27, 2022

Product Enhancements:

- ePayments > The Invoice totals on the Client Payment Portal have been updated to reflect any discounts or retainers applied.

- Cloud Feeds > Cloud Feeds have been enhanced to show check numbers for transactions involving checks.
- QuickBooks integration > Users now have the ability to exclude non-reimbursable expenses when sending expenses from CORE to QuickBooks.
- Fee Schedules > Batch Update capabilities have been added to Fee Schedule Services and Expenses.
- Budgets > Batch Update capabilities have been added to Project Budget Services and Expenses.
- Activities > "Extra" attribute has been added to the Activities lists.
- Activities > Description column has been added to all Activity filter drop downs throughout CORE.
- Batch Invoicing > Users can now update the percent complete of a Project from the Batch Invoice screen without it affecting their Net Bill.
- Reports > The Gross Margin report's layout has been updated for easier scanning and its performance has been optimized.
- Reports > The Time and Expenses report's layout has been updated for easier scanning and its performance has been optimized.
- Reports > The Expense Details report performance has been optimized.

Application Stability:

- Batch Invoicing > Projects were not showing up when using the Project Manager filter in the Create Batch Invoice screen. This was fixed.
- Batch Invoicing > Time Entries were being excluded when Auto Apply Retainer was selected on the Batch Invoice flow. This was fixed.
- Dashboard > The Project Status widget was showing incorrect contract amounts for Standard type parent projects. This was fixed.
- ePayments > Invoice amounts on outgoing ePayment emails were not accounting for discounts or retainers. This was fixed.
- ePayments > One of the CORE help links on the Global Settings ePayments screen was broken. This was fixed.
- Invoice Templates > Project phases were shown out of order on joint invoices. This was fixed.
- Invoices > Creating a batch invoice using the setting to 'generate an invoice amount based on % complete values' was not loading all the correct projects. This was fixed.
- Outlook integration > Some users were unable to sync all their Outlook events to CORE. This was fixed.

- Payments > There was an issue with displaying the client's projects in the modal window after saving and adding another Payment for a different Client. This was fixed.
- Projects > Batch updating custom fields was incorrectly updating all records when using search text to filter records. This was fixed.
- QuickBooks integration > Syncing joint invoices to QuickBooks Online was creating duplicates. This was fixed.
- Reports > Running the Project List report using certain filters would cause master projects to not display in the report. This was fixed.
- Reports > The Employee Performance report can now be filtered by Project.
- Reports > The Profit and Loss reports had issues when drilling into figures in the report. This was fixed.
- Reports > The Project Performance report was not properly displaying the Earned Value %. This was fixed.
- Reports > The Statements report has been updated to reset the page number totals for each Client.
- Reports > The Tax Registry report was showing incorrect grand totals. This was fixed.
- Time Card > When using a multi-week Time Card option, the user was not brought to Week 1 when moving between different periods. This was fixed.
- Time Entries > Exporting Time Entries to CSV was not honoring Cost and Bill rate security settings. This was fixed.
- Time Entries > Time Entry descriptions were incorrectly being reset if the Project of the saved entry was edited. This was fixed.

VERSION 1.1.164 RELEASED ON APRIL 15, 2022

Product Enhancements:

- ePayments > The ePayments portal has been enhanced to enable Clients to choose which Invoices to pay on a Statement.
- Invoice Templates > Invoice Template sections and appearance can now be batch updated from the Global Settings page.
- Projects > Users can now batch update Accounts from within the Projects list screen.
- Reports > Multiple group filters have been added to CRM reports.

- Reports > The Client List report layout format has been updated to improve readability.
- CRM > Group filters have been added to the Leads, Prospects, Opportunities, Quotes and Proposals list screens.

Application Stability:

- Cloud Feeds > Projects were not loading in the Project Drop Down when adding a new transaction of type "ITEM", if the project has Rule "Prevent Time Entry." This was fixed.
- Create Batch Invoice > Using the Project manager filter in combination with the "Generate invoice based on % Complete" rule caused certain projects to not show up. This was fixed.
- CRM > Client Contacts were not getting copied over as Prospect Contacts. This was fixed.
- CRM Opportunities > When applying a group filter on the Opportunity list screen, the top level KPIs would disappear. This was fixed.
- General > Projects were not being displayed using the correct sorting order in various screens like the Projects list screen and Create Batch Invoice for some users. This was fixed.
- General > Whenever the "All Dates" date filter was applied, the list screen would reset to This Year on the next refresh. This was fixed.
- Invoice Templates > The Hourly by Title invoice template was not displaying correct bill rates. This was fixed.
- Payables > The Vendor Bills and Purchase Order list screens had issues when applying the All-Dates filter. This was fixed.
- Projects > Recurring project types had issues with doubled amounts. This was fixed.
- Reconciliations > Duplicate transactions were unintentionally being created when double clicking the Clear checkbox really fast, making it impossible to balance properly. This was fixed.
- Reports > The Proposal Documents report had the wrong report label. This was fixed.
- Reports > The Contract Analysis report was not correctly honoring new report parameters. This was fixed.
- Reports > The Contract Analysis report was not displaying all projects if contract amount was not specified at the project level. This was fixed.
- Reports > The Expense Details report was incorrectly displaying Vendor records when Employee filters were applied. This was fixed.

- Reports > The Proposal Documents report was incorrectly displaying all Document records. This was fixed.
- Reports > Running or memorizing a Time Details report grouped by project or employee instead generates a report grouped by activity. This was fixed.
- Scheduled reports > Scheduled reports were not processed for instances with more than 13 email recipients. This was fixed.

Performance Fixes:

- Several areas of the application including API requests, list and detail views, reports and widgets have been optimized for better performance.
- Reports > The Billing Analysis report has been optimized for better performance.
- Reports > The General Ledger Cash report has been optimized for better performance.
- Reports > The Check Details report has been optimized for better performance.
- Reports > The Vendor Bills report format has been updated and the performance has been optimized.
- Reports > The Groups Assignment report was optimized for performance.

VERSION 1.1.163 RELEASED ON FEBRUARY 10, 2022

Enhancements:

- Allocation-Event Sync: When created from an allocation, any changes made to a calendar event will now auto update the corresponding allocation also.
- eSignature support for CRM Proposals: Proposals can now be emailed for digital signatures using DocuSign.
- Contract Amount and Taxes: Global Settings to select different contract tax configuration have been updated to help users distinguish between the three varied tax options Core supports.
- QBO Sync: A Linked column has been added to list views that support QuickBooks integration to help denote if a record has been synced or not.
- Pricing Update: CORE's role-based and Express package pricing has been updated.

Performance Fixes:

- The General Ledger Extended report has been optimized for better performance.
- The performance of the Time Entries, Expense Entries, and T&E Reviewer screens has been improved by limiting the use of the 'All Dates' period filter. 'This Year' will now be used as the default period for these screens and 'All Dates' can no longer be persisted as a saved option.
- The performance of the Employee Allocation, Task Allocation, Project Allocation and Staff Workload widgets has been improved by limiting the use of the 'As of', 'As of Today', and 'Custom' period filters and removing totals.
- User notifications polling has been optimized for performance.
- Project, Client and Invoice summaries have been optimized for better performance.

Application Stability:

- Updating the hours of an allocation line item did not properly save. This was fixed.

- The Follow-Ups dashboard widget would incorrectly continue to display follow-ups that were marked complete. This was fixed.
- Payees were experiencing issues in the payment portal when processing a payment was attempted and the required fields were not filled correctly. This was fixed.
- Setting a negative rate for an activity/expense line item was incorrectly saving as $0 instead of keeping the negative rate. This was fixed.
- Any custom label set for the Net Bill value in Global Settings was not being used in the Project Performance tab. This was fixed.
- When Google Drive was set as the default storage destination in Global Settings, previewing a file attached to an expense entry did not successfully display the file. This was fixed.
- Updating the Start and End Dates for a task allocation line item would not properly work. This was fixed.
- Payments that were recorded against a Client in QuickBooks were not properly syncing to CORE. This was fixed.
- The Vendor Performance report displayed an incorrect vendor credit balance when multiple bills were paid using vendor credits. This was fixed.
- If a Vendor did not have a first and last name, the Time Details report would display a blank space when grouping the report by Employee. This was fixed.
- Switching between two companies in one CORE account would cause issues when applying filters in Dashboard widgets. This was fixed.
- The Work in Progress Details report showed the incorrect discount amount in some instances. This was fixed.

- The Allocation vs. Earned Revenue with Forecast report was incorrectly calculating the total using the employee's bill rate instead of the rate taken from the assigned fee schedule. This was fixed.
- The Staff Workload widget did not include hours for allocations that did not have an end date causing an inconsistency with the hours displayed in the Employee Allocation Units report. This was fixed.
- When a Vendor's Tax ID Number was saved and the setting to track payments for 1099 was turned on, the TAX ID number displayed an error in all 1099 reports. This was fixed.
- Exporting the line items when batch invoicing creates a blank file. This was fixed.
- When viewing the Project Status widget by Budgeted Amount, the Open A/R column displayed the incorrect amount for phases. This was fixed.
- When matching CORE transactions, the auto-filled memos were incorrectly deleted after selecting the corresponding Project and Item. This was fixed

- Payments transferred to CORE as retainer are not successfully being used to pay an invoice. This was fixed.
- CORE expense sync to QuickBooks was creating multiple bills instead of a single bill. This was fixed.
- Joint invoices linked to one Project did not have the correct mappings even though the invoices were successfully syncing with QuickBooks Online. This was fixed.

Payroll Beta Updates:

- Users can now save historical employee payroll information to help with accurate YTD reporting.
- Entries that were approved in a previous period are now successfully maintaining the updated approval status.
- UI updates in Payroll Reviewer and Payroll Taxes report
- General Fixes

VERSION 1.1.162 RELEASED ON JANUARY 6, 2022

Application Stability:

- The Projects list view was not displaying any projects if the 'Date' type custom field was configured to display in the list view for one user. This was fixed.
- When filtering for an individual project or a range of all projects in the Forecasting Manual View tab, the results listed are duplicated. This was fixed.
- Error messages in Core have been updated to provide a better description of the error that occurred.
- Time Entries created using a device set to Central Time (US & Canada) were displaying tomorrow's date for the Created on and Last Updated fields instead of today's date. This was fixed.
- Only leads with a 'Pending' status were displayed in the Leads list view by default, but the default display should have also included leads with a 'New' or 'Contacted' status. This was fixed.
- Vendor bills that had time and expense synced to QBO were not syncing. This was corrected.
- Updating Start and End dates of dependent tasks in Gantt Chart would not update the underlying record for these date fields. This was fixed.
- When filtering the Allocated Hours report by a client group, data for the wrong client group is displayed in the report. This was fixed.
- CRM Proposal preview would not work if primary contact of a Prospect was added as one of the recipients. This was fixed.
- When pasting text from a Word document into the Proposal Builder editor, all indentations are lost. This was fixed.

Performance Fixes:

- The Time Details report was optimized for better performance

General Fixes:

- Descriptions were updated for each package in the Manage Subscriptions screen.
- The Managed By field on a standard Hourly invoice included an extra space between the first and last name. This was fixed.

Payroll beta user feedback:

- 'Net Pay x Percentage' was added as a calculation option for employee withholdings and company matching.
- A row for totals was added for each employee or vendor in the Employee Pay Items report.
- Bug fixes

VERSION 1.1.161 RELEASED ON DECEMBER 16, 2021

Performance Fixes:
- Default date filters have been updated throughout Core to improve performance.
- List views that displayed KPIs at the top were improved to improve page load times.
- Batch Update operations in Cloud feed have been optimized for improved performance.
- Project update involving Phase hierarchy was optimized for performance.
- General Ledger and Time Details report performance optimizations

General Fixes:
- Decimals were added back to the Billed, Paid, and Balance metrics displayed at the top of the Invoices list.
- Cumulative Project Custom budgets experience was optimized to allow users to add line items for phases w/o turning on custom budget flags for each phase.
- Monthly P&L report was updated to handle large numeric data w/o introducing overflow.
- Project list report had an issue with rolling up Contract amounts when the "hide phases" option was used. This was fixed.

Payroll beta user feedback:
- Added the ability to save historical employee payroll information
- Default filters applied to the Payroll Reviewer for faster access to relevant data
- Bug fixes

VERSION 1.1.160 RELEASED ON NOVEMBER 29, 2021

Subscription Pricing Update:
- BQE is introducing a new pricing structure to better package the most popular modules: Time & Expense, Project Management, and Billing. The new pricing model offers Accounting, CRM and HRM as add-on packages at the Company level. The new pricing changes will only apply to new CORE customers and will not affect existing users until a later date.

Application Stability:

- Users who had custom security profiles assigned were not able to load reports in the report center. This was fixed.
- The Vendor Bill report was crashing when the Vendor Bill Status filter was applied. This was fixed.
- Exporting a large number of records from the Create Batch Invoice screen would result in faulty exported files. This was fixed.
- Entering a memo in the Project details would cause Core to be unresponsive in the Chrome browser. This was fixed.

Performance Fixes:
- Follow up list view was optimized for performance.
- The General Ledger report was optimized for performance.

Payroll beta user feedback:
- Improved review and approval experience in the Reviewer
- Bug fixes

General Fixes:
- Updates to task start and end dates were not syncing within the Allocation & Forecasting screens. This was fixed.
- The Retainer Reconciliation report was not applying the date filter correctly. This was fixed.
- Time details Report shows project manager instead of employee/activity at the top when group by employee or activity.
- Payment type updates were not properly syncing throughout Core. This was fixed.
- When updating the description of a Time Entry, the memo would be deleted. This was fixed.
- Payment Receipts were being sent even with Global Setting turned off. This was fixed.
- The Client Transactions report has been updated to improve readability. New filter parameters have been added as well.

VERSION 1.1.159 RELEASED ON NOVEMBER 10, 2021

Application Stability:
- Fixed an issue that was preventing some two-factor authentication users from logging in.

- Fixed an issue that was not properly enforcing cost amount access on the Budget screen.
- Fixed an issue with date filters in the Time Card view for New Zealand users.
- Added several security related fixes.

Performance Fixes:
- Budget creation from existing budgets that had a large number of items was optimized for faster performance.
- List view KPI metrics were optimized for performance improvements when reporting for companies with large data.
- Performance optimizations were implemented for several reports that either failed to preview or would take a long time to preview.

General Fixes:
- The Time Details report has been improved for readability and now offers more filters.
- QuickBooks credit payments are now transferred as Client retainers instead of Project retainers.
- Added support for less popular international currencies for cloud feeds.

Payroll beta user feedback:
- Improved Employee Payroll Defaults UI.
- Updated several reports with default filters.
- Updated labels and captions.
- Bug fixing.

VERSION 1.1.158 RELEASED ON OCTOBER 25, 2021

General Application Stability
Several issues affecting existing features have been fixed throughout the application.

- ePayments > When returning to the ePayments portal to edit an existing payment, the incorrect deposit account details were being displayed. This was fixed.
- Projects > The Project list screen was not properly displaying search results when two or more Custom Field filters were applied. This was fixed.
- Bill Payments > ABA Files that were generated from the Bill Payments screen were incorrectly rounding amounts. This was fixed.

- Cloud Feeds > When matching transactions in Cloud Feeds, the Payee drop down menu was not displaying all records. This was fixed.
- Invoice Collections > Invoice Collection notes that were added to past or future dates were reverting to an incorrect date. This was fixed.
- Payments > The Invoices list in the Add Payment screen was not sorting dates correctly. This was fixed.
- Integrations > The eSign option was appearing for proposals after connecting a DocuSign account, but that feature is not yet available. This was fixed.
- Payments > The credit and debit amounts were not displaying the same amount when creating an ABA file from the Payments screen. This was fixed.
- Deposits > Users with Deposit records that were migrated to Core were experiencing issues when saving Text Custom Fields. This was fixed.
- ePayments > The branding update from DesignPay to ClientPay was not applied in some parts of Core. This was fixed.
- Updated help and other documentation.
- Other minor level fixes.

VERSION 1.1.156 RELEASED ON OCTOBER 9, 2021

What's new in this version?

Two-Factor Authentication app support
CORE has further enhanced its two-factor authentication security by now offering the ability to connect with popular authenticator apps. The implementation will support popular authenticator applications like Google Authenticator, Microsoft Authenticator, Twilio Authy among others.

Draft Invoice Editing
A highly requested feature enhancement to CORE's popular Billing module is finally here. Draft Invoices can now be edited directly in the Invoices screen. Relevant Invoice details ranging from Contact Information to discount and retainers can be updated from one clean interface.

Extend eSignature support to more modules

The ability to send documents out for collecting eSignatures directly from CORE has been expanded to other modules. Document eSignatures have been expanded to include Invoices, Purchase Orders, and Vendor Bills. When a document is sent for eSignatures, the eSignature status will be tracked and automatically updated in the respective Documents tab of the specified record.

CORE Payroll – Beta

Significant progress has been made on the upcoming CORE Payroll feature being introduced to round out CORE's overall offering including the ability to configure company and employee payroll defaults, approve entries to include in payroll, and process payroll for employees and agencies that follow multiple differing payroll frequencies. This module is currently in closed beta.

Cloud Feed Enhancements

Several enhancements have been made to the Cloud Feed module to improve the overall user experience. These include search and filter function, column resizing among other improvements.

Integrations Enhancements

Improvements have been made to strengthen the data synchronization with third party accounting software solutions.

Other Improvements:

- Assignments > A new option has been added to the Assignments tab of a Project's detail page so users can update phase assignments when changes are made at the Parent level.
- Batch Invoicing > Pre-Tax Net Bill has been added as a column to the Create Batch Invoice list screen.
- Benefits > Managers can set a benefit to have a maximum carry over amount calculated based on a multiplier of the previous year's remaining balance.
- Cloud Feeds > A filter panel and Search box has been added to all three transaction list views in Cloud Feeds.
- Cloud Feeds > Cloud Feeds rules can now be reviewed and edited from within the Transactions lists accessible from the More drop-down menu.
- Cloud Feeds > Column resizing has been added throughout the Cloud Feeds module.

- Cloud Feeds > Payee and Account have been added Core transactions details in the Pending list in Cloud Feed.
- Cloud Feeds > The Cloud Feeds matching experience has been updated to avoid list refreshes after an entry is matched.
- Dashboard > The dates on the x-axis for the newly-added Project Schedule widgets have been moved to the top of the chart.
- Dashboard > The Retainer Balances widget has been updated to exclude Clients with a zero-retainer balance.
- ePayments > CORE has been updated to work smoothly with DesignPay's brand name transition to ClientPay.
- General > When merging entities, the confirmation dialog now displays the exact names of the entities being merged to make the process more transparent.
- Global Search > Users now search for Cost Amount along with other currency fields like Cost and Bill rates.
- HR Reviews> Questions on Employee Reviews can now be assigned specifically to the Reviewee, Reviewer or Both.
- Integrations > A column for Invoice number has been added to the QuickBooks Unmapped records screen on the Core side.
- Integrations > Credit Payments can now be synced from QuickBooks to Core as Retainer Payments.
- Invoice Templates > Invoice Templates can now be configured to allow eSignatures.
- Invoices > A project rule has been added to include retainer summaries on invoices.
- Leads and Prospects > Added City and State as filter options in their respective list view screens.
- Performance > CORE data queries have been optimized to improve widget and report performance.
- Project Templates > In the To-dos tab of a Project Template, the Duration column label was changed to "Duration (Days)" to better describe the information displayed in the column.
- Reports > A Resource filter option has been added to the Time Card Cross Tab report.
- Reports > An Employee Group filter has been added to the Employee Utilization report.
- Reports > An option to show Start and Stop times has been to the Time Verification and Time Detail reports.
- Reports > Options have been added to the AP Aging with Credits report to Show/Hide details and to Show orphaned General Journal entries.
- Reports > Resource and Vendor filter options have been added to the Time Verification report.
- Reports > The Class filter has been added to the following reports: AR Aging, AR Aging 5 Steps, AR Aging 8 Steps, AR Aging with Retainage.
- Reports > The Expense Details report has been updated for improved readability.

- Reports > The Notes column in the Employee Notes by Category report has been expanded to take full advantage of the page width.
- Reports > The Payment Refunds report has been updated for improved readability.
- Reports > The Time and Expense by Parent Project report has been updated for improved readability.
- Reports > The Time and Expense report has been updated to improve its readability and offer more filter parameters.
- Reports > The Time Card Cross Tab report has been updated to improve its readability and offer more filter parameters.
- Reports > Several reports had issues with the drill down feature and this update remedies that.
- Retainers > An option to modify the memo text for ePayments-enabled Retainer Invoices has been added to the ePayments Settings section.
- Split Bills > We have enhanced this function to allow users to configure 0% billing splits.
- Subscriptions > We have bumped up free storage allowance from 2 GB to 5 GB limit per Company.
- Time & Expense > If a Project has the "Auto-approve Time/Expense" rule checked, CORE will allow its entries to be updated irrespective of the "Allow Edit of Approved Entry" security permission.
- Time & Expense Reviewer > When opening the Time & Expense Reviewer screen, the search box of the list was updated to be the initial focus upon page load.
- User Preferences > Users now have the option to turn off the recent suggestions feature on CORE drop-down lists.
- Vendor Bills > Duplicate Vendor Bill restrictions have been enhanced to allow the use of the same bill number for different Vendors.
- Vendor Bills > eSignature capabilities have been added to Vendor Bills.
- Vendor Bills > Time and Expense entry attachments will be automatically added to a corresponding Vendor Bill and all attachments cannot be accessed in the Documents tab of the Vendor Bill details.
- Vendor Bills > Workflow options have been added to the Actions menu in the Vendor Bill details.

Other Fixes:
- Accounting > The General Ledger Extended report was not showing memos entered at the expenses item level on invoices. This was fixed.
- Bill Payments > The Amount field on the Bill Payment list screen was incorrectly including the Vendor Credits applied. This was fixed.
- Bill Payments > The NACHA file generated from the Bill Payments screen for Australian companies was causing errors when uploaded to Commonwealth Bank to initiate a batch payment. This was fixed.
- Calendar > The Sync Date on the CORE Calendar was not reflecting the correct local time. This was fixed.

- Create Batch Invoice > When batch updating a list of Project billings, the system would allow the user to specify a discount amount and then apply it as is without checking the net bill amount for that Project. This was fixed.
- Dashboard > On the Due Projects widget, filtering the list for projects with a 'Canceled' Project Status was not working. This was fixed.
- Dashboard > The Cash Flow widget was not properly displaying Invoice payments made via one Payment. This was fixed.
- Dashboard > The Payment Date filter in the Retainer Balances widget was not properly transferring retainers. This was fixed.
- Documents > In the Documents list screen, clicking on a disabled eSign action would open the detail view of that document record. This was fixed.
- ePayments > A third party scenario was causing the ACH Transaction Status to not update to Completed. This was fixed.
- Estimates > The Documents tab of an Estimate's detail page displayed the row actions menu outside of the table when the eSign Status column was not turned on. This was fixed.
- Expense Entry> An update to the billable flag would reset the charge amount if the user had not entered a Cost rate. This was fixed.
- HR > Users that had the Core Express and Core Express HR subscription added to a company file were unable to preview any of the on-screen Reports for the HR modules. This was fixed.
- Integrations > Payments were not syncing over to Xero from Core if the Bank account under sync setting was set to the Bank account created in the Xero. This was fixed.
- Lists > The height of the error message displayed in CRM lists when deleting an item that is in use was cutting off the message. This was fixed.
- Opportunities > New contacts could not be created from an existing CRM Opportunity. This was fixed.
- Project Budgets > For Budgets with many budgeted items, the Unbudgeted Items row would duplicate itself at the end of the list. This was fixed.
- Project Templates > In the To-dos tab of a Project Template, the "Create Time Entry" action for a to-do item does not open the modal to create a time entry and causes an error. This was fixed.
- Project Templates > The ability to add an attachment when creating a time entry from a project template's to-do item was not working. This was fixed.
- Projects > Few users had reported that the Percent Complete value was not rolling up to the Parent Project in the Structure tab interface. This was fixed.
- Projects > Rearranging the phases in a project's Structure tab was not properly saving the correct order. This was fixed.
- Projects > The Projects list view column sort was not correctly sorting for several columns. This was fixed.
- Projects > The relocated dropdown for all the phases in a project's detail view was missing the ability to scroll through a longer list of phases. This was fixed.

- Projects > When adding a Team Member under the Assignments tab in Project details, sorting the list of Team Members in the dialog would cause the entire list to vanish. This was fixed.
- Projects > When navigating to a different phase from the Project details, the tab location was not persisted. This was fixed.
- Projects > When searching for team members to assign in a project detail's Assignment tab, the modal's search box was only searching for entries that were initially loaded and displayed instead of searching the whole list. This was fixed.
- Projects > When using the Expand Sub-phases action in the Projects list screen, some projects were being duplicated and an incorrect view count was being displayed. This was fixed.
- Proposal Builder > When trying to preview a Proposal that had a Quote in the Compose Email module, the preview window had overflowing tables. This was fixed.
- Reports > New Zealand based customers could not preview the WIP Reconciliation Report. This was fixed.
- Reports > Profitability percentage was being calculated incorrectly when the Invoice amount was $0. This was fixed.
- Reports > Purchase Order History report had an issue when grouped by Vendor. This was fixed.
- Reports > Several users had complained that they would get a blank page inserted at the end of the report when previewing or printing the report. This was corrected.
- Reports > Several users had complained that a few of the standard reports had stopped working if the logged user had a custom defined security profile. This was fixed.
- Reports > Some Equity accounts were not being displayed in Viewer format for the Balance Sheet Cash Basis report. This was fixed.
- Reports > Some Financial Reports were producing an extra blank page at the end of the report. This was fixed.
- Reports > The Activity by Project report was not properly supporting the drill down feature. This was fixed.
- Reports > The Balance Sheet by Class Accrual Basis report threw a system error when drilling down into the number details. This was fixed.
- Reports > The Documents report was not displaying the payroll labels properly. This was fixed.
- Reports > The Employee Daily Time Card and Time Verification on-screen reports were not reflecting the same date range as the Time Card screen. This was fixed.
- Reports > The Employee Expense report total numbers were not trying out. This was fixed.
- Reports > The Missing Classification category was not being displayed in certain scenarios across the AR Aging reports. This was fixed.
- Reports > The Paid filter was not being correctly applied when running on-screen reports from the Payments screen. This was fixed.

- Reports > The Project Time Entries report was not respecting the cost security when a scheduled report was delivered. This was fixed.
- Reports > The Top N Expenses report was not properly supporting the drill down feature. This was fixed.
- Reports > The Workflow Details report could not be filtered by Vendors. This was fixed.
- Scheduled Reports > Reports could not be scheduled for more than 15 emails. This was fixed.
- To-dos > The list of To-do items would disappear whenever creating a new To-do for an Opportunity in the main To-dos list screen. This was fixed.
- To-dos > To-do reports were not available to generate from the To-dos list screen for Invoices and Project templates. This was fixed.
- To-dos > When creating a Time Entry from a To-do, attachments couldn't be added from the Resource Library option. This was fixed.
- Vendor Bills > When creating a new vendor bill, time entries that have already been marked as paid using batch update in the Time Entries screen were incorrectly being listed in the time entries CORE suggests to include in the vendor bill. This was fixed.
- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes.

VERSION 1.1.155 RELEASED ON AUGUST 21, 2021

What's new in this version?

Project Schedule Dashboard Widgets

Two new dashboard widgets have been added to CORE to help users better visualize their project schedules and allocations. The "Project Schedule by Due Date" widget displays projects in a Gantt chart using each project's start and due dates. The "Project Schedule by Allocation" widget also displays projects in a Gantt chart, but is driven by Project allocation dates.

Enhanced Project Templates

Project Templates have been further enhanced to streamline the project creation process and eliminate manual data entry. Additional phases can now be added to existing project

templates. When setting up a project template, project managers can also elect to designate a standard set of To-dos to that template that can be cloned when setting up a new project.

Allocate from Events

CORE Calendar Events have been enhanced to further integrate with the Allocations module. New and existing events can now be used to create Allocations. Event details will be used to pre-fill the Allocation information and reduce the need for duplicating data entry.

Other Improvements:

- Activity Items > The "Purchase Tax" column label has been updated to match the label used in Expense Items.
- Calendar > Calendar events that have been used to create a Time Entry will now be marked with an icon to signify that a Time Entry record exists.
- Checks, Deposits > An anchored totals row has been added to the Checks and Deposits list screens.
- CRM Email Templates > Custom fields can now be used as Smart Fields when setting up a CRM Email Template.
- Dashboard > The Priority column was added to the To-dos widget.
- Dashboard > The Project Status Widget was missing the Marketing option for the Project Contract Type filter. This was added.
- ePayments > ePayment invoice emails have been updated to accommodate multiple invoices being sent out at once.
- eSignatures > A new status column has been added to the Documents list view that will display the Document's eSignature status.
- Employees > The Employee Account number field has been expanded to accept up to 16 digits.
- Expenses > The cost amounts for approved expense entries have been added to the automated email notifications.
- Follow-Ups > Users can now issue a quick search for matching follow-ups based on Assigned to and Follow-up type values.
- Integrations > CORE Joint invoices that are synced to QuickBooks will now remain as one invoice rather than being split into multiple Invoices in QuickBooks. Users can also retain to use the old option.
- Integrations > The date time stamps in the Sync history have been updated to reflect the logged in user's time zone.
- Invoice Templates > The Joint Invoice Templates have been updated to improve readability.

- Invoices > Manual invoices can now be created from an existing Custom Budget.
- Projects > Project detail hierarchy navigation has been expanded to include all tabs in a Project's details.
- Projects > The tooltip for the Spent column in a Project detail page's Structure tab was updated to more accurately describe that column's information.
- Reports > The Time Entry Delay report has been added to the Report Center.
- Reports > All Financial Budget reports will now include Income and Expense accounts even if they have not been assigned a budget but have a balance in the specific period.
- Reports > The Billable Work History report has been re-designed to improve readability.
- Reports > The Cash Flow vs Revenue report has been re-designed to improve readability and offer new filter options.
- Reports > The Project Group filter has been added to the WIP Reconciliation and Employee Utilization reports.
- Reports > The Retainage Summary by Client report has been re-designed to improve readability.
- Reports > The Taxes report has been re-designed to improve readability.
- Reports > The Top Ten in Revenue report has been re-designed to improve readability and offer new filter options.
- Reports > The Void Invoices report has been re-designed to improve readability and offer new filter options.
- Retainers > Project Retainers can now be transferred between different clients.
- Security > A new security option has been added to control the "Update Rates" feature in Time Entry.
- Security > A new security option has been added to show or hide bill rates on reports.
- Submit Workflow > The messaging for notifications and workflow emails have been updated for submissions that are forwarded to another manager for approval.
- Time & Expense Reviewer > Taxes (including Purchase Tax) can now be added to the Time & Expense Reviewer list view as optional columns.
- Vendor Bills > Users can now enter Purchase Tax as an amount by prefixing the number with a "$" symbol.

Other Fixes:
- Bill Payments > Bill Payments could not be saved for users that switched their country to UAE in the company profile. This was fixed.
- Budgets > Selecting all records on the Budgets list view and then scrolling to expose more records in the list would cause Batch Updates to affect an incorrect number of records. This was fixed.

- Create Batch Invoice > In certain scenarios involving a large number of Phases per Project, the Percent Complete option would not display all the phases that were due for billing. This was fixed.
- Credit Cards > An issue in code was preventing updates to the class associated with a line item. This was corrected.
- CRM > Custom fields were incorrectly overlapping between filters for all CRM modules (Leads, Prospects, Opportunities). This was fixed.
- Dashboard > The Submittal and RFI widgets would disappear from an existing dashboard and could not be added back when a new subscription was assigned to a logged in user. This was fixed.
- Estimates > When downloading an Estimate from the Estimates list view, the PDF would contain extra pages. This was fixed.
- Forecasting > The forecasting algorithm was not able to distribute a 1-unit allocation. This was fixed.
- General > Drop down items displayed under the recent section were not appearing in their usual position in the broader list. This was fixed.
- General > Filtering a list view by a text box type of custom field and then editing that field for a record would cause the entire list of records to disappear. This was fixed.
- General > Logos were not being uploaded with the correct dimensions in Company Profile. This was fixed.
- Integrations > Project costs were not being tracked appropriately using the QuickBooks sync. This was fixed.
- Integrations > Invoice sync was not working if the CORE project for the invoice had the automatic email on processing turned on. This was fixed.
- Invoices > The "Last Emailed On" column was not correctly adjusting the date time field to the user's time zone. This was fixed.
- Invoices > The Project Manager filter would cause some of the paid invoices to show up as Open. This was fixed.
- Leads, Prospects > The autocomplete feature was not working properly for the Tag filter on the Leads and Prospects list views. This was fixed.
- Manual Invoices > When creating a manual invoice, the date format was not following the local settings set for Australian users. This was fixed.
- Messages > Opening an attachment from the Message details screen would cause a screen error. This was fixed.
- Projects > Quick search would limit the list view to 25 records if the user had chosen to display a custom field in the list view. This was fixed.
- Proposals > The placeholder text in the search box of the Add Quote modal was incorrectly labeled. This was fixed.
- Prospects > The file name of the selected file when uploading a document in the note details of a Prospect's contact was not displaying in the modal. This was fixed.
- Prospects > When importing contacts via csv files into a Prospect record, saved mappings were not showing up on subsequent imports. This was fixed.

- Reports > An issue with the Open Purchase Orders report was preventing open Purchase Orders from showing up if they had a line item with a negative number of units. This was fixed.
- Reports > The Project Groups report was un-necessarily including the "All' group. This was fixed.
- Reports > The "Project Time and Expenses" report was not including the extra billed expenses in the Account Summary. This was fixed.
- Reports > The Budget Comparison by Employee report was not displaying the correct sums under the Spent Amount column in some cases. This was fixed.
- Reports > The Employee Missing Time Week View report was not showing Employees who had missing time, if a Vendor with the same name existed. This was fixed.
- Reports > The Notes report was not displaying all relevant records when applying a date filter. This was fixed.
- Reports > The Project List report had issues when applying certain logical filters. This was fixed.
- Reports > The WIP Reconciliation report has been optimized for performance.
- Time & Expense Reviewer > When the Select All checkbox was used for Workflow Status filter, the list view would not display all records as it should have. This was fixed.
- Time Card > The Bi-week period used on employee time cards and the Employee Bi-weekly Time Card report were not referencing the same period. This was fixed.
- Time Card > When a time entry was submitted to My Manager as Payroll type only, the submit status icon would not show up on the Time Card. This was fixed.
- Time Entries > The newly added import CSV feature was not including the Class column when imported from a CSV file. This was fixed.
- To-dos > To-dos that were batch updated to an inactive status were still showing up on the list view. This was fixed.
- To-dos > To-dos were not properly sorted by their priority. This was fixed.
- Vendor Bills > non-reimbursable expense entries were being marked as reimbursable when their associated Vendor Bill was paid via Credit Card or Checks. This was fixed.
- Vendor Credits > In the Vendor Credits Create New and Details screens, the Accounts Payable field did not have a red asterisk to indicate that it is a required field. This was fixed.
- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes.

VERSION 1.1.154 RELEASED ON JULY 3, 2021

What's new in this version?

CORE eSignatures with DocuSign
This update adds the hugely requested feature of electronic signing for CORE reports and documents. We have added this feature by partnering with DocuSign, the world leader in digital signing allowing CORE users to send documents and reports for eSignature to any external or internal contact. The fully embedded eSignature experience has also been added as an option in Budgets, Estimates, Time Card, Time Entry and Expense entry screens and allows users to send reports for electronic signing with or without preview.

Time & Expense Import

Time and Expense Entries can now be bulk imported to CORE by uploading a .csv file. The import wizard can be accessed from the More option of the list views. CORE also has the ability to memorize the column mapping from your designated file to streamline future imports.

BAS Statement
Australia-based companies can now generate a Business Activity Statement from CORE using their existing company data. The Business Activity Statement module will allow users to review and make edits to the required input fields. Each BAS can be saved for future reference and a neat report can be shared with internal or external parties.

ABA File Export
Australian and New Zealand users can export their Bill Payments to an .aba file format file. ABA is a preferred file format for all the major banks in the Australia and NZ to automate Bill Payments.

Pre-fill Time Card from Allocated Tasks
Time Card suggestions have been enhanced to now suggest time card rows based on allocated tasks. Each user will now have the option to have their Time Card suggestions based on recent time entries, allocated tasks for a given period, or a combination of both.

Other Improvements:

- Accounting > Multiple Accounts Receivable and Accounts Payable accounts can now be used when creating a Journal entry.
- Activities > Purchase Tax Rate has been added as a Batch Update option in the Activities list view screen.
- Batch Invoices > When launching the Billing Details report from the Create Batch Invoice list screen, it will now include the Billing Through dates.
- Billing > Upon billing 100%, Projects will now be marked complete based on the Global Setting rule, regardless of Project Contract type.
- Budgets > Cumulative Budget list view scrolling has been improved.
- Budgets > The Project Budgets UI has been updated for improved readability. A new subtotal row has also been added to report the unbudgeted units that have been incurred on that specific project or phase.
- Clients > The Clients list screen now supports searching by Address.
- Clients > The Company column was made to be an optional column in the Clients list view.
- Clients, Employees, Vendors, and Projects > State and City were added as optional columns for the Clients, Employees, Vendors, and Project's list screens.
- Custom Fields > Custom fields can now be batch updated from all existing modules that support them.
- Dashboard > Additional filters have been added to Dashboard widgets for Principal and Originator.
- Dashboard > The Last Week period filter option has been added to the Time Performance widget.
- Dashboard > The number format on Dashboard widgets have been updated to include commas.
- Employees > Employee Groups can now be batch updated and assigned from the Employee list screen.
- ePayments > ePayments users can now set default ePayment profiles for each payment type (ACH and Credit Cards) at the global level. Previously, users could only set one default profile, regardless of type.
- Forecasting > The Activity grouping for Other Tasks can now be expanded from the Forecasting list screen.
- General > Additional optional columns have been added to the following list screens: Employees, Clients, Vendors, Projects, Invoices, Payments, Time Entries and Expense Entries.
- General Journal > A totals row has been added to the review step while importing entries via CSV to the General Journal.
- Global Settings > Administrators can now set up a separate default Account for Late Fees in Global Settings.
- Invoice Collections > A Notes count has been added to the Invoice Collections screen.
- Invoices > Draft Invoices can now be Approved and Finalized from the Invoices list view screen.

- Invoices > Time and Expense entries on Draft Invoices will now be included in Work in Progress calculations for reports and widgets.
- Leads and Prospects > A Job Title attribute has been added to CRM Leads and Prospects.
- Lists > Default Note Categories can now be edited or deleted from the Note Categories list.
- Notes > The ability to add notes for secondary level contacts was added in the Contacts tab of a Client, Employee, and Vendor.
- Opportunities > A Created-On column has been added to the CRM Opportunities list screen.
- Opportunities > Custom fields have been added to CRM Opportunity records.
- Opportunities > New CRM Opportunities can now be created for existing Contacts (Clients, Vendors, Employees) using a row action from the corresponding list screens.
- Opportunities > Notifications will now be sent to a user when they are assigned to an Opportunity.
- Opportunities > Sales Commissions were not being processed if the Quote Amount or Proposal Amount were chosen as the final amount when marking an Opportunity as Won. This was fixed.
- Overtime Calculator > The Overtime Calculator has been enhanced to support Employee Weekly Standard Hours. Also, Overtime rules can now be set on a weekly or daily basis.
- Project Templates > Custom Fields have been added to Project Templates.
- Projects > The Originator field for a Project will be automatically set as the user creating the Project.
- Projects > When cloning an existing Project, Custom Fields can now be included as part of this process.
- Reports > An option to Include Write ups and Write Downs has been added to the Billing Details report.
- Reports > The Custom Retainer Invoice report now supports the ePayments Pay Now button.
- Reports > New filter options have been added to the Monthly Billing Statement report and the report layout has been updated to improve readability.
- Reports > New filter options have been added to the Percentage Billed report and the report layout has been updated to improve readability.
- Reports > New filter options have been added to the Tax Tracking report and the report layout has been updated to improve readability.
- Reports > The Cloud Feeds report can now be filtered to show All, Pending, Ignored or Included in Core records.
- Reports > The Originator and Principal filters have been added to the following Aging reports: AR Aging, AR Aging 5 Steps, AR Aging 8 Steps, AR Aging with Credit Payments, and AR Aging with Retainage.

- Reports > The Originator and Principal filters have been added to the following financial reports: Balance Sheet Accrual by Project and Profit and Loss Accrual by Project.
- Reports > The Originator, Principal and Project Manager filters have been added to the following Analysis reports: Actual and Billing Comparison, Cost Analysis, Earned Value and Employee Realization Rate.
- Reports > The Originator, Principal, and Project Manager filters have been added to the following accounting reports: Vendor Bills by Project, Open Purchase Orders, Purchase Order History, Purchase Order Invoice, Purchase Order Received Item, Purchase Order Time & Expense, and Purchase Orders.
- Reports > The Originator, Principal, and Project Manager filters have been added to the following Activity/Expense reports: Activity by Project, Top N Activities, and Top AND Expenses.
- Reports > The Originator, Principal, and Project Manager filters have been added to the following Billing reports: Account Transactions, AR Reconciliation, Billed Time and Expenses, Billable Work History, Cash Flow vs. Revenue, Invoice Register, Payment Refunds, Retainage Summary by Client, Statement, Taxes, Statement by Client (Accountant), Top Ten in Revenue, Void Invoices, Work In Progress, and Write Up Write Down.
- Reports > The Originator, Principal, and Project Manager filters have been added to the following Client reports: Client Retainer Summary, Client Transactions, Tax Registry, and Top N Clients.
- Reports > The Originator, Principal, and Project Manager filters have been added to the following Company reports: Collection Calls, Conditional Lien Release, Contacts, Employee Profitability, Employee Project Utilization, Firm Reconciliation, Group Assignments, Mailing Labels, Monthly Revenue by Project, Notes, Payroll, To-do Tasks, WIP Reconciliation.
- Reports > The Originator, Principal, and Project Manager filters have been added to the following Employee reports: Employee Allocation Units, Employee Control, Employee Daily Time Card, Employee Expenses, Employee Half Monthly Time Card, Employee Paid Time Off Comparison, Employee Time Card Summary, Employee Time Detail, Personal Time Off Usage, and Staff Workload.
- Reports > The Originator, Principal, and Project Manager filters have been added to the following Payment reports: Cash Flow Monthly Statement, Cash Receipt YTD Comparison, Cash Receipts, Cash Receipts Journal, Collections, Credit Memo Receipt, Credit Memos, Credit Payment Receipt, ePayment Details, Paid Time and Expense Disbursements, Paid Time and Expenses, Payment Details, Payment Receipt, Payments Synced with QuickBooks, Refund Retainer Receipt, Retainer Details by Project, Retainer Invoice, and Void Payments.
- Reports > The Originator, Principal, and Project Manager filters have been added to the following Project reports: Submittals, Drawings, and Allocated vs. Earned Revenue with Forecast.

- Reports > The Originator, Principal, and Project Manager filters have been added to the following Time and Expense reports: Expense Details, Allocated Hours, Time Verification, Time Card Crosstab, Time Card Week View, Time and Expenses, and Time Details.
- Reports > The preview option label was changed to "Preview Format" to better describe the associated action.
- Reports > Principal and Originator filters have been added to the following accounting reports: Vendor Bills, Vendor Bill Status, Trust Fund Account Activity.
- Reports > The Project Profitability report now has the option to calculate Profit with or without Work in Progress.
- Reports > The Sales Forecast Distributed and Sales Forecast Summarized reports can now be drilled down on for more granular details.
- Reports > The Sales Forecast Summarized report can now be filtered by Category.
- Reports > The Time Verification report now has the option to group by week.
- Reports > Newly added reports and custom reports are now made available to users with full reports access only.
- Reports > The Accounts Receivable report's calculation performance has been optimized to handle large amounts of data.
- Sales Forecasting > Additional security has been added to the Sales Forecasting module in CRM to limit access to certain users.
- Subscriptions > Core has added Express subscriptions for CRM and HR Packages.
- Task Allocations > Memos can now be batch updated from the Task Allocations list screen.
- Time and Expense Reviewer > The Reviewer list screen can now be filtered for Reimbursable entries.
- Time Entries > The Purchase Tax Rate field has been added to the detail view of Time Entries and Activities.
- Time Entries > The Time Entry description field has been expanded to accept up to 200 characters.
- To-Dos > Batch Update functionality has been added to the To-Dos list view screen.

Other fixes:
- Activities > Batch Updating the description field from the Activities list screen to use more than 200 characters would result in a system error. This was fixed.
- Calendar > Some synced calendars from Office 365 were displaying the wrong name in the Core Calendar view. This was fixed.
- Credit Cards > A system issue would prevent updating the class field of a charge. This was fixed.
- Custom Fields > Custom fields used for either Leads, Prospects or Opportunities that exceeded the character limit were showing up as saved when there was no record found. This was fixed.

- Dashboard > The YTD date filter was not working properly for the PTO widget. This was fixed.
- Dashboard > The Project Status Widget would remove existing filters if the View By option was changed from Budget to Contract Amount. This was fixed.
- Dashboard > The Staff Utilization widget would ignore Contract Employee type vendors. This was fixed.
- General > The 'Accounting' main navigation link was not highlighted while on the Reconciliations page. This was fixed.
- Global Search > In some instances, the "Recent Activities" results were displaying duplicates. This was fixed.
- Manage Users > Core allowed the deletion of employees with entries submitted to them. This was fixed.
- Opportunities > Creating a Project from an Opportunity using a Project Template would result in a system error. This was fixed.
- Overtime Calculator > Overtime entries created by the OT Calculator did not inherit the memo of the original entry. This was fixed.
- Projects > Project Name and Contract Amount columns were not properly being exported in CSV files from the Projects list view. This was fixed.
- Projects > The Projects list view row count was not properly updating when phased projects were expanded and then collapsed. This was fixed.
- Proposals > When deleting a Proposal that had a Note with an attachment, the associated Note was getting deleted but the attachment was not. This was fixed.
- Proposals, Opportunities > The ability to quickly add a new opportunity from the Create Proposal screen was not successfully creating the new Opportunity. This was fixed.
- Prospects > The tooltip was not working properly on the mapping step of importing Prospects via CSV. This was fixed.
- Prospects > When adding or editing a note for a Prospect's contact, the Created By column was incorrectly allowing users to specify the note's creator from a wrong list of options. This was fixed.
- PTO > Updating an existing paid time off request would incorrectly update the "Requested on" date to the current date. This was fixed.
- Purchase Orders > Purchase Orders created from Budgets would use the Bill rate of service items and not the Cost rate. This was fixed.
- Recurring Bills, Invoices > The system was not able to create new bills and Invoices if one or more of the recurring schedules were assigned to a Project or used line items of a Project that had been marked as Completed. This was fixed.
- Reports > The Employee Realization Rate report drill down feature would crash when any filter was applied. This was fixed.
- Reports > The "Contract Analysis" report would not show the Project ID and not follow the Project Display As global setting. This was fixed.
- Reports > The Employee Performance report was not reflecting the entries that are marked directly as billed in the realization rate column. This was fixed.

- Vendor Bills > Custom fields that are configured to show up in the Bills list view were not showing up. This was fixed.
- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes

VERSION 1.1.153 RELEASED ON MAY 1, 2021

What's new in this version?

Google Calendar Integration
CORE is proud to announce an integration with Google Calendar. Users will be able to pick and choose which Google Calendars to sync with Core's calendar module. Users will be able to add, edit and delete Google Calendar events directly from the Calendar interface. Additionally, users can create Time Entries from Google Calendar events directly from the Calendar view.

Enhanced Global Search
CORE's Global Search feature has been enhanced to improve the overall performance and result quality. Users now have the option to also search for keywords in Notes, Memos and also include Custom Fields in the search. The search engine has been improved to also list the recent activities performed within Core.

Sales Forecasting
CORE has added a new Sales Forecasting module as part of the CRM subscription. Users will now be able to track their forecasted sales in a monthly, quarterly or yearly view. Forecasted sales figures can be grouped by either Resource or Prospect and can be pivoted to show a distributed or summarized list.

Advanced CSV Import

This update adds the CSV Import feature to General Journals. We have also made powerful additions to the import experience like allowing users to save field mappings and to upload Contacts during Lead or Prospect imports. Additionally, users will have the option to upload Contact records directly from the Prospect Contacts tab.

Purchase Tax for Services

This update adds the Purchase Tax attribute to Vendor Bill service line items to ensure proper accounting for all Purchase taxes paid for vendor services.

Other Improvements:

- Allocation & Forecasting > The Manual View in the Forecasting module has been optimized for improved performance.
- Benefits > Benefit label was changed to "Benefit Period Units" to better describe the purpose of the field.
- Bill Payments > When creating a new Bill Payment, users now have the option to select an individual Payee or a range of Payees.
- CRM > The list of the navigation items under Sales Tools have been reordered.
- Dashboard > The Project Manager filter was added for the Employee Allocation, Project Allocation, Project Allocation by Activity, and Task Allocation widgets.
- Dashboard > The Principal and Originator filters have been added to Project Widgets.
- ePayments > The labels in the Statement Payment page have been updated to better suit the purpose of the link.
- Projects > A tooltip was added to the Use Custom Budget checkbox in the Project details screen to better explain what this setting is and how this setting works.
- Projects > Project Name was added as a separate optional column in the Projects list view.
- Projects > Projects can now be created from an existing Budget. This creation can be initiated from the Budgets list view row actions menu or from the Budget details Actions menu.
- Projects > The Expand/Collapse Sub-Projects action has been enhanced to work with filters also.
- Projects > When exploring the details of a Phase, users can now navigate to any phase in the Project Hierarchy using the drop-down navigation.
- Projects > When working on a percent complete contract type, users will now be prompted if they change the contract amount used to create their Billing Schedule to confirm the changes throughout.
- Projects > Core has added the ability to batch update Projects for default Invoice templates.

- Prospects > The "Assigned To" smart field has been added to the Prospect email screen.
- Reconciliation > Core is now hard coding the Check NO/REF No for Check as "*SVCCHRG*" that is created against Bank service charges during Account Reconciliation.
- Reconciliations > The 'Cancel' button label in the Reconciliation screen was changed to a 'Continue Later' to better clarify that those changes will be saved and users can resume where they left off.
- Reports > A new CRM report has been added to track Distributed Sales Forecast.
- Reports > A new CRM report has been added to track Summarized Sales Forecast.
- Reports > More filter options have been added to the Billing Analysis report. Additionally, the report layout has been updated to improve readability.
- Reports > More filter options have been added to the Billing Forecast report. Additionally, the report layout has been updated to improve readability.
- Reports > More filter options have been added to the Billing Schedules report. Additionally, the report layout has been updated to improve readability.
- Reports > More filter options have been added to the Historical Billing report. Additionally, the report layout has been updated to improve readability.
- Reports > More filter options have been added to the Invoice Reconciliation report. Additionally, the report layout has been updated to improve readability.
- Reports > More filter options have been added to the Overdue Invoices report. Additionally, the report layout has been updated to improve readability.
- Reports > More filter options have been added to the Retainer Reconciliation report. Additionally, the report layout has been updated to improve readability.
- Reports > More filter options have been added to the WIP with AR report. Additionally, the report layout has been updated to improve readability.
- Reports > More filter options have been added to the Work in Progress Details report. Additionally, the report layout has been updated to improve readability.
- Reports > More filter options have been added to the Yearly Billing Cross Tab report. Additionally, the report layout has been updated to improve readability.
- Reports > The ability to filter by class was added to four balance sheet reports: Balance Sheet Accrual Basis, Balance Sheet by Class Accrual Basis, Balance Sheet by Class Cash Basis, and Balance Sheet Cash Basis.
- Reports > The Aged WIP with AR report layout has been updated to improve readability.
- Reports > The Class filter has been added to most of the Profit and Loss reports.
- Reports > Payee and Transaction Type columns have been added to the Cloud Feeds report.
- Reports > The Principal and Originator filters have been added to Project Reports.
- Reports > The Project List report can now be grouped by Project Group.
- Reports > The Project Manager filter has been added to the Time Details report.
- Reviewer > A new security setting has been added that will allow admin users to control user access to filters in Reviewer.

- Time and Expense > The batch update process in the Time Entries, Expense Entries, and Time & Expense Reviewer screens has been optimized to allow updating up to 5000 records in seconds. Workflow status updates will be processed in background.
- User Preferences > An option to be notified when a proposal has been submitted for approval has been added.
- Vendor Bills > Core will now automatically update the time and expense entries to match an updated Vendor Bill date if they were assigned the same date earlier.

Other fixes:
- Batch Invoices > In some scenarios, when batch updating custom fields from the Batch Invoicing workflow, Core would incorrectly reset other custom field values. This was fixed.
- Bill Payments > When clicking "Save & Add Another" after editing a Bill Payment, the Payee dropdown in the modal should not allow you to quick add. This was fixed.
- Billing Schedule > Schedules that were configured as negative service amount would cause the Expense portion of the Invoices to be processed as negative. This was fixed.
- Budgets > When filtering the Budgets list for amounts that were equal to a specified Budgeted Profit Amount, the filter did not work if a budget only had a miscellaneous amount entered or no service amounts entered. This was fixed.
- Checks > Users were allowed to enter a negative value for Purchase Tax. This was fixed.
- Client > Performance tab charts would take a long time to render in certain situations. This was fixed.
- Client > The Profitability widget in the Performance tab was not including Time and Expense entries that had been manually marked as billed. This was corrected.
- CRM > Emails that were synced from the Outlook integration were not displaying correctly when dark mode was turned on. This was fixed.
- Custom Fields > In some scenarios, when existing Custom Fields were deleted from a module, Core would hide all records from the affected module's list view screen. This was fixed.
- Dashboard> The Gross Margin widget was not including data from Projects whose managers were set as inactive. This was corrected.
- Dashboard > The Gross Margin widget was not including Time and Expense entries that had been manually marked as billed. This was corrected.
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- ePayments > Some DesignPay payment platform users had duplicate payment records show up in CORE when they received a Credit Card payment. This was fixed.
- ePayments > Terminated or inactive users received emails and notifications for online payments for any invoices they created when they were active. This was fixed.

- ePayments > When composing an ePayments Statement email, the credit card and ACH icons were both displayed instead of conditionally being displayed based on the type of ePayments account set up. This was fixed.
- ePayments > An issue with one of BQE's payment partners was causing the payment status to show up as ejected even after the ePayment was processed successfully. This was fixed.
- ePayments > When sending receipt emails for a successful email to the Client, Core would show the other recipients of the emails as well. This was corrected.
- General > The currency symbol was changed from KSH to S when refreshing the pages for Kenya regional settings. This was fixed.
- General > The incorrect date format was being displayed for Australian regional settings. This was fixed.
- General > When doing a text search in the filter panel, using the Select All checkbox option would select all options instead of just selecting the shortened list based on the text search. This was fixed.
- Integrations > Office 365 emails are now automatically synced once every hour during active use of the CRM Leads and Prospect screens.
- Invoice Collections > The note date for an invoice when updated in an Invoice's detail view would not show up correctly in the Collection view. This was fixed.
- Invoices > When downloading an invoice as a PDF from the row actions menu, the Hours column was missing. This was fixed.
- Payments > Core would incorrectly display the "Create Payment" option for Invoices that had ePayments scheduled. This was corrected.
- Payments > When creating a new payment for a client then clicking 'Save & Add Another', the Add Payment modal allowed you to choose projects that weren't associated with the selected client. This was fixed.
- Project > Updating ePayment profiles would not update correctly if the batch size was more than 300 records. This was fixed.
- Projects > If a project is assigned to 2 groups and the Projects list filter was set to include both of these groups, the project record would display twice in the list. This was fixed.
- Projects > In the Assignments tab of Project details, users were unable to clear the search text box in the Add New dialog when trying to add a new contact or team member. This was fixed.
- Projects > When cloning a project, the character limit for the Project ID was not enforced in the Clone Project modal. This was fixed.
- Projects > When selecting a parent project in the Projects list view, not all phases would get selected all the time. This was fixed.
- Projects > When deselecting the 'Use Custom Budget' checkbox in a parent project, any regular budget selected for one of that project's phases was being erased. This was fixed.
- Reconciliations > We have streamlined the Resume Reconciliation user experience.

- Reports > For security purposes, the ePayments report has been removed from the Time & Expense and HR administrator subscription packages.
- Reports > The Billing Details report has been updated to reflect proper calculations. Services WIP, Expenses WIP, Proposed Net Bill are now updated to only factor in the values of billable entries. Cost, Bill Amount, Services WIP, Expenses WIP, Proposed Net Bill are now updated to round each entry to 2 decimals
- Reports > The Profit and Loss YTD Comparison Accrual Basis report was displaying the wrong currency symbol in the Gross Profit and Net Ordinary Income rows. This was fixed.
- Reports > Exporting the Gross Margin Real Time report to CSV would produce duplication of records. This was fixed.
- Reports > Memorized reports would bypass security restrictions if shared with other users. This was fixed.
- Review Templates > Deleting a question type from the Question Types list screen and a review template from the Review Templates list screen would cause the search box at the top of each list screen to disappear until the tab was opened again. This was fixed.
- Reviewer > Sorting by "Last Action By" would cause unexpected results to show up in the Time & Expense Reviewer screen. This was fixed.
- Security > The column widths of the Security Profile Reports tab table were not properly distributed. This was fixed.
- Time Card > Sorting by the L-Code column in the Time Card would cause all the time entries already entered to disappear. This was fixed.
- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes

VERSION 1.1.152 RELEASED ON MARCH 6, 2021

What's new in this version?

This update addressed several issues and added many highly requested features. Most notable:

Statement Payments | ePayments
Core now allows users to set up electronic payments for Client Statements.

Office 365 Email Integration | CRM

Core is extending its Office 365 integration to CRM emails. Users will now be able to sync email communications with their CRM contacts directly to Core and also use their Office 365 account to send out emails.

Project Budgets Enhancements | Project Management

Project Budgets have been improved to allow direct access from Project's detail view. Users can now manage Project and phase budgets in one unified interface and also have the ability to create custom budgets for Projects or their phases.

HR Benefits with roll over rules | HR

HR administrators now have more control around how employees can earn benefits. These newly added attributes will allow HR administrators to specify a benefit's maximum accrual amount, maximum carry amount, reset date, and earning rules.

In-App Referral Program | Subscriptions

Core is proud to introduce a Referral Program for our existing users. Referring colleagues can earn them a free demo of Core so that our team can explain how Core can be the best solution for their business's needs. Existing users can access their referral link from within the web and mobile applications.

Other Improvements:

- Assignments > An option was added in the Assignments screen so that users can now easily copy assignments from a project's associated budget.
- Assignments > The experience for copying assignments from parent projects to any sub-phase was simplified.
- Checks > A new template has been added to allow checks to print in the Voucher-Check- Voucher format.
- Client Contacts > The Quick Search feature was added to filter a client's contact list based on a search keyword.
- CRM > Time Entries can now be created directly from CRM To-Dos and Follow-Ups.
- CRM Email Templates> Browser right click was being prevented. This was fixed.
- CRM > Added the "Cost Rate" column to the Quote Templates list view screen.
- Dashboard > The Privacy Options field was renamed as Sharing Options to better reflect the changes this setting can make to a dashboard.

- Emails > The email notifying employees about an upcoming employee review date was reformatted.
- ePayments > A new Global Setting has been added to let administrators control if the biller, project manager or administrator should get ePayment notifications.
- Expense Entries > Expense Entry charge amounts can now be calculated directly within the entry cell. In-cell calculations support basic math operations including addition, subtraction, multiplication and division.
- Expense Entries > Paid Date was added as an optional column in the Expense Entries screen.
- Follow-Ups > The CRM Follow-Ups list view screen can now be exported as a CSV file.
- General > More optional columns have been added to list view screens throughout Core.
- Global Settings > A User Interface option has been added to hide the Copyright on standard Invoices and Reports.
- Groups > The Quick Search feature was added to the list within the Groups detail page.
- Invoice Templates > Invoice Templates can now be Batch Updated from the Projects list view screen.
- Invoices > Purchase Order Number was added as an optional column in the Invoices list view screen.
- Invoices > The Email Recipients column was added to the Invoice list screen.
- Leads, Prospects > Name and Company have been added as optional columns to the CRM Leads and Prospects list view screens.
- Leads > In the Emails tab of a Lead's detail page, the email statuses are displayed using descriptive icons instead of text.
- Manual Invoices > Batch action "Delete" was renamed to "Exclude" when the Invoice was based on Approved Time and Expense.
- Opportunities > Project Budgets created from Opportunities marked as Won will now add the same Fee Schedule that was attached to the Quote.
- Project Templates > When creating a new Project using a Project Template, users now have the option to copy the Project Groups from the template.
- Projects > Budget and Contract analysis reports can now be launched from the Structure tab of a Project's details.
- QuickBooks integration > QuickBooks sync logs can now be downloaded as a CSV file.
- Report Center > The Report name column has been expanded to fit all report names without truncating.
- Reports > A Select All option has been added to the filter drop downs in the Report Center.
- Reports > An option has been added to the Unpaid Vendor Bills report to show only those records linked to an Invoice.
- Reports > The Billed Time and Expenses report has been updated to make it easier to read and understand.

- Reports > The Budget Comparison by Phase report has been updated to make it easier to read and understand.
- Reports > The Cash Receipts Journal report has been updated to make it easier to read and understand.
- Reports > The Paid Time and Expenses report has been updated to make it easier to read and understand.
- Reports > The Statement by Client (Accountant) report PDF document map has been updated to separate out each Client.
- Reports > The subtotals on the AR Aging with Retainage report have been updated to include more column subtotals.
- Reports > The Privacy Options field was renamed as Sharing Options to better reflect the changes this setting can make to a memorized report.
- Retainers > When creating a Retainer, Legal users will now be able to denote if the Retainer is for a Trust Fund.
- Time Entry, Expense Entry, Reviewer > Batch Update function updated to process Business logic rules and can support batch size of 5,000 entries
- Time Card > Users can now expand the text box field when adding a memo to a time entry from the Time Card.
- To-dos > When a Project related To-Do is marked complete, users will now have the option to disable the dialog that asks if they would like to create a Time Entry for that To-Do. This option can be reset from User Preferences.

Other fixes:

- Budgets, Estimates > The default width of the ID column was very narrow and needed to be increased. This was fixed.
- Clients > The Append Memo to Top or Bottom options were not working in the Client list view Batch Actions. This was fixed.
- Cloud Feeds > Some Cloud Feed transaction records were not downloaded if they had long description fields. This was fixed.
- CRM > The CRM Follow-Up badge count on all CRM list views was incorrectly including Inactive, Hold and Complete records. The badge count was fixed to only include Active or Incomplete Follow-ups.
- CRM > When creating a time entry from a to-do item that's marked 100% complete, the Employee field is not pre-filled with the Assigned To value in the prompt. This was fixed.
- CRM > No Sales Goal assigned notification was received if a Goal was assigned to an Employee Group. This was fixed.
- Dashboard > The Hours widget was not including data for Vendors. This was fixed.
- Dashboard > PTO widget had an issue related to "All Dates" filter. This was fixed.

- Employee Control > Selecting the checkbox next to an employee's name in the Copy Assignments pop up of the Employee Control screen would not check the box associated with the correct employee. This was fixed.
- ePayments > When creating a new Core ePayments profile for a service provider that was already connected, users were still being asked to create a new account. This was fixed.
- Forms > The actions menu when viewing a form was hidden behind the file preview. This was fixed.
- Fund Transfers > When a user applied the Account filter to the Fund Transfers list view and then launched the Fund Transfers report from this screen, the report did not honor the applied filter. This was fixed.
- General > In some instances throughout Core, duplicate filters were incorrectly being applied to list view screens. This was fixed.
- General > Some color enhancements have been made to the Dark Mode theme to make it easier to view.
- Forms > HR Forms could not be uploaded to Core from the Resource Library. This was fixed.
- Integrations > Core would apply Project MST/MET on Invoices that were imported from QBO even when they had a Tax line with this amount already present. This was fixed.
- Integrations > Bills created in QBO; Ireland region were fetching amounts that included VAT. This was fixed.
- Integrations > Office 365/Outlook Calendar sync would not show for the Time Expense subscription users. This was fixed.
- Payments > UI glitch would sometimes cause users to enter the same payment twice. This was fixed.
- Projects > The Class range filter was not working in the Projects list view. This was fixed.
- Projects > When merging Project records from the Projects list view, the confirmation dialog was displaying the incorrect number of records to be merged. This was fixed.
- Projects > Quick search would not work for dropdown type custom fields. This was fixed.
- Purchase Orders > When emailing a Purchase order, the Project smart field was not getting filled. This was fixed.
- Quote Templates > Resizing the newly added Cost Rate column would cause an error that prevented users from sorting the list by this column. This was fixed.
- Recurring Transactions > Core would incorrectly stop processing recurring transactions after the 24th instance. This was fixed.
- Reports > The Bill Status filter was incorrectly added to the Billing Details report. This was fixed.
- Reports > When users included the main taxes in their Project contract amounts, Core wasn't storing values to calculate the contract balance properly. This was fixed.

- Reports > Trial Balance Cash Basis report would show NSF Payments as positive amounts. This was fixed.
- Reports > The Client List report was not showing the country in the Address column if the attribute existed for each record. This was fixed.
- Time Entries > The Start Time and Stop Time fields on the Time Entry detailed view did not show proper time values in their respective drop-down menus. This was fixed.
- Time Entries> When updating a batch of entries for Project, the relevant Class was not being inherited. This was fixed.
- To-Dos > To-Dos associated with deleted Projects were not also being deleted. This was updated.
- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes

VERSION 1.1.151 RELEASED ON JANUARY 2, 2021

What's new in this version?

This update addressed several issues and added many highly requested features. Most notable:

Dark Mode Theme
The Dark mode theme is now available from User Preferences. The meticulously designed light-on-dark color scheme adds a new refreshing new look to CORE and also helps reduce eye strain.

Shared Dashboards
Dashboards have been enhanced to allow sharing them with groups, individual users or both. Users can now also designate an owner for Dashboards.

Shared Memorized Reports
Memorized Reports have been enhanced to allow sharing them with groups, individual users or both. Users can now also designate an owner for each Memorized Report.

Enhanced Project and Account Display options

We have redesigned the Project and Account display options in Global Settings. The new changes include more options for combining individual components and a live preview to find the best combination that works for you.

CORE Touch 2 Talk

The Call Support feature was enhanced with a numeric keypad to allow users to provide interactive responses during the call. Other enhancements include enabling users to continue using CORE without disconnecting the call and a new button to call BQE Sales.

Administrator Controls for 2-Factor Authentication

Admin users can now apply a uniform 2FA authentication policy for CORE users at their company. Options include enforcing a mandatory opt-in for 2-FA for all or selected users as well as staying informed about its compliance.

Project Structure Tab Enhancements

The Project Structure tab has been improved to display more information about a parent project and its phases. Projects can now be seen in comparison with a project's associated budget or contract amounts. Additionally, the columns of the project table have been categorized into 3 sections to better understand all the information being displayed.

Other Improvements:

- Allocation & Forecasting > Users with a Time and Expense subscription can now update the % Complete value for their allocations.
- Batch Invoices > Users can now turn on custom field columns when reviewing Project time and expense entries.
- Batch Invoices > Users can now turn on Project and Client Retainer Available columns on the batch billing screen.
- Bill Payments> CORE now remembers the last Bank/Credit Card Account used for Bill Payments for both of the supported payment methods.
- Calendar > Hovering over an event in the calendar now gives users a preview of the event's description.
- Calendar > If you have connected your Office 365 account, you can now create new calendar events in CORE and have them instantly sync to your Outlook Calendar.

- Calendar > CORE now maintains a link between events and time entries created from these events to prevent duplicates.
- Client > Users can now enter longer company names for their clients.
- Cloud Feeds > The "Included in Core" list has been updated to include cloud feed details, date of matching and important attributes of the matched transaction.
- Cloud Feeds > Users will now have an option to disconnect an account and not lose existing matched transaction mappings if they choose to connect the account again.
- CRM Emails > Users will now be able to track if an email has been read by the recipient(s).
- CRM Leads, Prospects > The Referred By attribute has been updated to display a pre-filled list of existing contacts.
- CRM Quotes > Cost Rate has been added as an optional column in the Services tab of a Quote's detail page.
- CRM Quotes > Quote rates have been updated to reflect the rates from Fee Schedules.
- CRM Quotes > Service and Expense line items can now be copied from an existing Budget or Estimate.
- Dashboard > Project and Resource filters have been added to all Allocation widgets.
- Dashboard > The Project Profitability report is now accessible directly from the 'Gross Margin by Project' Dashboard widget.
- Emails > CORE email layouts have been updated to provide more useful information.
- Emails > The workflow approval emails sent from CORE have been updated to allow more room for Project names.
- ePayments > Company Owner and Administrator accounts will now be notified via email when third party ePayment integrations are enabled.
- Follow-Ups > The Follow-up list edit experience has been updated to make it consistent with the rest of the application.
- General > A Select/Un-Select All option has been added to all multi-select dropdown menus in CORE.
- General > New optional columns have been added to important screens like Project, Client, Timers, Time entry, Expense entry, Expense Items, Project Templates, Budgets, Estimates, Bill Payments and Reviewer based on top user requests.
- Integrations > Specific Project rules have been bypassed while getting transaction data like Time and Expense entries and Bills from Xero, QBO and MYOB to CORE.
- Notes > The Notes list screen can now be filtered by Status. Additionally, the Status column has been added to the Notes associated to other CORE records.
- Notifications > Users now have the option to be notified when a Project has been assigned to them.
- Projects > A 'Completed On' field has been added to Project details. This field will only become available when a Project has been marked Complete.

- Projects > Project Assignments have been made easier with the added ability to add assignments to or delete assignments from a parent project and its phases at the same time.
- Reports > Added 'Unpaid Vendor Bills': List of unpaid Vendor bills that have received AR Payments. New Report
- Reports > We have added a brand new 1099-NEC report that matches the latest guidelines from IRS. 1099 MISC and 1096 MISC have also been updated with new changes. New Report
- Reports > 'Financial Budgets Comparison by Class' report has been added to the Report Center. New Report
- Reports > 'Comp Time' column has been added to the Employee Utilization report.
- Reports > 'Notes Category' filter has been added to the Notes report.
- Reports > 'Reminder Date' filter has been added to the Billing Schedules report.
- Reports > 'Tax Line number' column has been added to the Chart of Accounts report.
- Reports > An option has been added to the WIP Reconciliation report to view Time and Expense separately or combined.
- Reports > Balance Sheet reports now offer a summarized option for a condensed view for Assets, Liabilities and Equity.
- Reports > Labels have been appended to Retainer Invoice numbers on the ePayments report to differentiate between normal and Retainer Invoices.
- Reports > Memorized reports have been enhanced to include its unique name in the footer of the report.
- Reports > Profit and Loss reports now show a section for 'Net Ordinary Income'.
- Reports > The Monthly Profit and Loss reports can now be filtered by Class.
- Reports > The on-screen Reconciliation report has been updated to only show transactions that are part of the current reconciliation.
- Reports > The WIP Reconciliation report has been updated to exclude Projects that had zeros across all column values.
- Reports > Trust Fund has been added as an option for the Transaction Type filter on all financial reports.
- Reports > Users can now limit the 'Employee Missing Time' report to various Employee and Vendor types.
- Security > Administrator users can now set up separate security settings for Company and Individual level integrations.
- Subscriptions > Users can now send requests for subscription to admin accounts from any screen that is not included in their CORE subscription.
- User Preferences > Users now have an option to get reminded daily or weekly about missing or incomplete time cards.
- User Preferences > Users now have the option to turn off the Allocation summary feature in the Time Card and Time Entries screen.
- Vendors > The Vendor Transactions tab can now be filtered by Date period.

Other fixes:

- Calendar > Time entries created from Calendar events were missing the Start and Stop times. This was fixed.
- Calendar > When creating a time entry from a calendar event, the time entry project field was not being pre-filled using the event's project value. This was fixed.
- Checks > The total record count was displaying 0 records when the Payee Name filter was applied even if there were records in the list. This was fixed.
- Checks > When editing the details of a Bill Payment Check, the "Back to Checks" link was incorrectly being changed to "Back to Bill Payments" after clicking the Save & Done button. This was fixed.
- Checks > When trying to void a check used to pay a vendor bill whose bill number exceeded 49 characters an error will occur. This was fixed.
- Credit Cards > The Credit Cards exported file name was incorrectly downloading as Credit Card Transactions. This was fixed.
- CRM > The search bar in the Add & Modify dialog for Follow-Ups was not searching against the Follow-up Type and Assigned To attributes of Follow-up records. This has been fixed.
- CRM Leads > If converting a Lead to a Prospect was delayed, the loading message was not displaying. This was fixed.
- CRM Lists > The Leads and Prospects SCORE values were not displayed in the order that was configured in the Lists module. This was fixed.
- CRM Opportunities > Adding a new Quote from the Quotes tab of an Opportunity defaulted the quote date value to be blank instead of today's date. This was fixed.
- CRM Opportunities > Recurring type Projects could not be created from the Create Project dialog of the Opportunity screen. This was fixed.
- CRM Opportunities > When creating a new Project as an Opportunity is marked as Won, the contract type field should default to be Hourly. This was fixed.
- CRM Opportunities > When marking an Opportunity as Won, the Forecast amount option in the modal only included the dollar amounts and excluded cent values. This was fixed.
- CRM Proposal Builder > After inserting a Quote and saving a Proposal, the 'Remove' action on the Quote was not working. This has been fixed.
- CRM Proposal Builder > Right clicking to paste text into the Proposal Builder was not working. This has been fixed.
- CRM Prospects > When searching for a Prospect using the list view quick search and opening the detail screen of a resulting record, returning to the list view by pressing "Cancel" should retain the search keyword and results when coming back to the list view. This was fixed.
- CRM Quotes > Filtering the Quotes list view by a specific date included Quotes with no quote date value in the resulting list. This was fixed.

- CRM Resource Library > After a CRM user uploaded a document then modified the description on the same file, they were incorrectly blocked from performing this action stating the user did not have the right permissions. This was fixed.
- Dashboard > The To-dos widget in the dashboard was missing the Assigned By filter. This was fixed.
- Dashboard > The To-dos widget was always displaying behavior that should have only been shown on hover. This was fixed.
- Deposits > The total records count was missing on the list view when applying filters. This was fixed.
- Emails > In some instances when users typed alphanumeric values in the To field of the Compose Email module, the text was being cleared. This was fixed.
- Emails > The Address Book in the Compose Email module had some text overflow UI problems. These were fixed.
- Follow-Ups > A red asterisk was missing for two required fields in the Add Follow-Up modal. This was fixed.
- Global Settings > Smart Fields were not being correctly populated in the Default Message field within Email Settings. This was fixed.
- Global Settings > Users were allowed to enter values into greyed out fields that should have been disabled. These were fixed.
- HR Reviews > When a user created a new Review and clicked save, the modal did not immediately close which gave the impression the record was not created and often led to creating duplicate entries. This was fixed.
- Integrations > Invoice Amounts would not transfer correctly to QBO if the invoice was generated using the Net Bill feature of Batch Invoice screen. This was fixed.
- Invoices > Hourly Invoices for Phased Projects weren't handling the Retainer Summary correctly. This has been fixed.
- Invoices > Recurring Retainer Invoices were not inheriting the Online ePayment account attribute when creating from an existing Retainer Invoice. This was fixed.
- Invoices > The 'Last Emailed On' field would not refresh by itself when an Invoice was emailed. This was fixed.
- Invoices > Workflow notes were being truncated when viewed from the Workflow History section of an Invoice's detail page. This was fixed.
- Opportunities > Batch Update actions performed on Opportunities were creating duplicate entries in the record history. This was fixed.
- Opportunities > Projects that are linked to an existing Opportunity could be deleted. This was fixed.
- Project > Cloning a Project would not copy the allocation dependencies in the source Project's allocations. This was fixed.
- Projects > The Assign Groups modal in a Project's detail page was not properly sorting the list of groups that can be selected. This was fixed.
- Projects > The Assign Groups modal when editing a project's details was not sized properly. This was fixed.

- Projects > When deleting a rule assignment, the wrong text was displaying in the fading confirmation message. This was fixed.
- Prospects > In a Prospect's detail page, the tooltip message was not displaying the message for the Display As field. This was fixed.
- Prospects > In the notes tab of a Prospect's detail page, changing the category in the "Show" dropdown would change the time stamp for existing notes. This was fixed.
- Reports > A few important filters were missing from the ePayment Details report. This was fixed.
- Reports > Custom field filters were not working for CRM reports. This was fixed.
- Reports > In some cases, Payment Amount was shown in the Processing Charges Recovered column on the ePayments report. This was fixed.
- Reports > New credit card payments were showing a status of none in the ePayments report. This was fixed.
- Reports > The Billing Details report was producing an unnecessary page with no information as the last page. This was fixed.
- Reports > The column headers were only appearing on the first page of the AR Aging with Credit Payments report. This has been updated.
- Reports > The Employee Details report would not show the 2nd address line. This was fixed.
- Reports > The Employee Performance report date was not following regional settings. This was fixed.
- Reports > The Notes report was displaying all dates in the US format instead of honoring regional settings. This was fixed.
- Reports > The Notes report was not properly fetching the date values for system generated Notes associated with a Follow-up. This was fixed.
- Reports > The Percentage Billed report was displaying a $ sign next to the percentage values in the % Billed column. This was fixed.
- Reports > The report column headers were not repeating across all pages for the Project Time Entries report. This was fixed.
- Reports > The Workflow Details report was not labeling the groups of items by the type of module. This was fixed.
- Reports > Various Time Reports were showing duplicate time entries if the Project was assigned to multiple Groups. This was fixed.
- Retainers > IOLTA accounts were not showing up as an option when performing a Batch Update on Project Retainer Invoice. This was fixed.
- Retainers > Some column header alignment issues were fixed on the Retainers screen.
- Review Templates > When adding a question based on an existing question, the Question Text column was too narrow to get a good sense of which question was being selected. This was fixed.
- Time & Expense Reviewer > The system filters were not being persisted on the Time & Expense Reviewer screen if a user clicked into the details and clicked Back into the list view. This was fixed.

- Vendor Credits > Sorting by the AP Account column in the Vendor Credits list view was not working properly. This was fixed.
- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes

VERSION 1.1.150 RELEASED ON NOVEMBER 15, 2020

What's new in this version?

This update addressed several issues and added many highly requested features. Most notable:

AffiniPay ePayment Integration
Core now integrates with AffiniPay and its affiliate payment platforms to offer online payments for Invoices and Retainers. The industry specific appeal of LawPay, DesignPay and CPA Charge make these a natural fit for Core's users. Our LawPay integration is designed to handle Trust Fund accounting while keeping it compliant with ABA and IOLTA guidelines. Our integration will support both Credit Cards and ACH payment methods and also allow users to set up scheduled and partial payment as options for their Clients.

Office 365 Calendar Integration
Core users can now integrate their existing Office 365 calendars to Core's calendar module. Our integration will support any Microsoft Cloud account that connects with the Office 365 Calendar. Users get to choose which of their Outlook Calendars will show in Core's Calendar. Outlook events can be assigned Projects and event attendees in Core and can also be converted to a Time Entry. Core will always maintain a real time sync to avoid any conflicts.

Multi-Period Time Card
Core's popular Time Card screen has been enhanced to handle multiple time periods including Bi-Weekly, Semi-Monthly and Monthly intervals. Time Entry users can now view, edit, and submit multiple weeks' worth of entries directly from the Time Card. Similarly,

Managers can now approve multiple weeks' worth of entries. Users will also be allowed to use the "Copy To" and "Copy From" feature in the Weekly and Bi-Weekly periods.

Automatic Refresh for Core Cloud Feed Transactions
Core Cloud Feeds have been automated to ensure you are up-to-date with all available transactions from your connected bank or credit card accounts. Syncing your existing bank and credit card transactions to Core has never been easier!

Call Support Button
BQE's customer support department can now be contacted directly from Core. Core has introduced a new "Call Support" button in the top navigation that works as a direct connection to our support department - making it easier than ever to contact us whenever you need help navigating through Core!

Other Improvements:

- Budgets > Project details have been added to the Budget details General tab to make it easier to track the associated project.
- Budgets & Estimates > Budgets and Estimates can now be downloaded as a PDF directly from their respective list view screens. This option has been added as a row action for each record.
- Budgets & Estimates > The Review/Approve/Reject buttons in Manager workflow emails have been expanded to include Budgets and Estimates.
- Cloud Feeds > Core Cloud Feed CSV import has been updated to automate the CSV column mapping process. Core will automatically map the required fields with the CSV columns in the file based on the columns that had previously been mapped.
- Cloud Feeds > Core Cloud Feeds have been enhanced to handle Batch Add for up to 100 records at a time. Previously, users were constrained to a 25-record limit for Batch Add.
- Cloud Feeds > Core Cloud Feeds have been updated to automatically fill the transaction memo line when matching records.
- Credit Memos > Credit Memos can now be emailed directly from their list view. This has been added as a row action option for each record.
- CRM > A column chooser was added to the Follow-Ups modal so that Priority and Status can be used as optional columns.
- Dashboard > A new widget has been added to allow users to track and update the status of RFIs directly from their Dashboard.
- Dashboard > A new widget has been added to allow users to track and update the status of Submittals directly from their Dashboard.
- ePayment > We now allow partial payments for ACH methods.

- ePayments> Payment portal page has been updated to show payment history of previous online payments.
- ePayments > Core's existing Stripe ACH integration flows have been updated to make the sign-up flow more intuitive.
- ePayments > The project manager and biller will now receive email notifications when a Client's ACH payment has been successfully processed.
- ePayments > The project manager and biller will now receive email notifications when a Client's credit card payment has been successfully initiated.
- General > All Core list view screens have been enhanced to show the total number of records in the header section.
- General > Core drop downs have been updated to automatically select all text to make it easier to delete the entire text in case you want to make a different selection.
- General > Custom fields can now be added to Core list view screens as optional columns. Users can elect to add up to three existing custom fields in all the major screens including Time and Expense entry screens.
- General > Progressive scrolling improvements have been implemented in all Core list view screens.
- HR > Print preview has been added as a row action for Employee Reviews.
- Invoices, Payments, Retainers, Credit Memos, Invoice Collections, Purchase Orders, Vendor Bills > These entities can now be downloaded as a PDF directly from their respective list view screens. This option has been added as a row action for each record.
- Leads > A Documents tab has been added to Leads details that will allow uploading files to a Lead record.
- Leads > The Referred By field can now be populated using your existing list of Clients, Contacts Employees and Vendors.
- Leads > When converting a Lead into a Prospect, users will now have the option to also include any Documents attached to that Lead record.
- Opportunities > Priority was added as an optional column to the Opportunities list view screen.
- Opportunities > Projects can now be created for Opportunities that have not been marked as Won yet. This will allow users to track Time and Expense against the Opportunity-linked Project.
- Projects > Parent Project Assignments can now be copied to sub-phases from the Assignments tab in Project details.
- Projects > When adding a phase to a Project, the Principal field of the phase is now automatically populated using the Principal from the parent project.
- Proposals > The list of accessible Core Smart Fields in the Proposal Builder has been expanded to include the following: Current Date, Current Time, Current Date Time, and Quote ID.
- Prospects > Prospects and Contacts can now be imported via CSV upload from the Prospects list view screen.

- Prospects & Leads > An Attachments indicator column has been added in the Emails tab.
- Prospects > Users can now search Prospects by their Contacts' names.
- Quotes > When creating a Quote, users can now use Activity or Expense Groups rather than just individual line items.
- Reports > A Cleared status filter has been added to the Check Details report.
- Reports > A Project Manager filter has been added for the Project Allocation Earned Revenue Distributed Forecast report.
- Reports > An ePayments Details report has been added. This report will help outline transaction details for companies accepting ePayments.
- Reports > The Annual, Quarterly and Monthly Financial Budget vs Actual reports can now be accessed from the Report Center.
- Reports > The AR Reconciliation report can now be grouped by Client, Project, Master Project, Project Manager, Principal and Contract Type.
- Reports > The Benefit Assignment report has been updated to include a Value column for Fixed type benefits.
- Reports > The Cash Receipt YTD Comparison report has been updated to allow grouping by Client, Project, Master Project, Project Manager, Principal or Contract Type. Additionally, this report now has the ability to hide phases.
- Reports > The Employee Profitability report has been updated to include an option to hide Expenses.
- Reports > The following Budget reports have been re-designed to improve their readability: Budget Comparison by Employee, Budget Comparison by Phase, Budget Comparison Summary, Budget Comparison and Budget Details.
- Reports > The following reports have been re-designed to improve their readability: Account Transactions, AR Reconciliation, Contract Analysis, Employee Expense, Gross Margin, Time Verification, WIP Reconciliation and Work in Hand.
- Reports > The Invoice Reconciliation report can now be grouped by Master Project or Project.
- Reports > The Percentage Billed report now has the option to hide phases when grouping it by Master Project.
- Reports > The Project Profitability report has been updated to make it easier to read and understand.
- Reports > The Proposals, Quotes, Contacts and Opportunities reports can now be filtered using Tags.
- Reports > The Work In Hand report has been updated to make it easier to read and understand.
- Reports > The Work in Progress report has been updated to increase its readability.
- Reports> We have extended the address book feature to Report Viewer emails.
- RFIs, Submittals, Drawings > The ability to batch update records has been added for RFIs, Submittals, and Drawings list view screens.
- Scheduled Reports > Scheduled reports can now be sent in either PDF, CSV, Excel or Word format.

- Settings > An extra time entry security setting was added so that administrators can decide which employees are allowed to update actual hours for other employees.
- Time & Expense Reviewer > Overtime was added as an optional column to let users know which time entries were marked as overtime.
- Time & Expense Reviewer > As part of the Batch Mark Billed process, we have updated the information listed in the drop-down menu to include Billing Period.
- Time Entries & Expense Entries> Users can now select up to 3 custom fields to be included in these rapid entry screens.
- Vendors > The Transactions tab under Vendor details can now be filtered by Credit Card transactions.
- Workflow > Users can perform workflow actions for all selected records by using "Select All" in Time entry, Expense Entry and Reviewer.
- Workflow > Core will now present users with a summarized view of the entries before confirming batch approvals or rejections.
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Other Fixes:

- Allocation & Forecasting > Hours were lost in the Forecasting screen Smart View when two or more Allocations were made against the same Resource for the same time frame as the weekly Forecasting view. This was fixed.
- Budgets, Estimates > The memo added when a Budget or Estimate is approved was not properly displayed in the Workflow History section of the respective details screen. This was fixed.
- Cloud Feeds > After scrolling to the bottom of all Ignored Transactions under a Cloud Feed account, clicking on the Select All checkbox would not select records at the top of the list. This has been fixed.
- CRM > When viewing the details of notes accessed from CRM list views, there was an alignment issue for the Add Documents link. This was fixed.
- CRM Lists > Exporting the list of Scores as a CSV file excluded the Active column. This was fixed.
- Documents > Viewing the associated entry for a chart of accounts document from the Documents list view resulted in an error. This was fixed.
- Follow-Ups > The CRM Type dropdown at the top of the Follow-Ups screen did not have a label. This was fixed.
- General > Filter chips on list views were not applying any custom labels defined from global settings. This was fixed
- General Journal > When a new general journal entry was made using an existing entry number, the confirmation prompt asking users if they would like to continue

with this duplicate entry number redirected them to the list view screen instead of keeping them on the create screen. This was fixed.

- HR > The Question Types list view and Add modal displayed alignment issues. This was fixed.
- HR Reviews > The review PDF would not open on its own and needed to be re-named since it lacked an appropriate file extension. This was fixed.
- HR Reviews > Core was incorrectly changing the status of the performance review to In Progress when it was saved. This has been fixed.
- Invoices > After searching for an Invoice using the list view text search, users could not apply a Late Fee filter. This was fixed.
- Messages > When composing a message, the column headers of the recipient field dropdown lacked proper spacing. This was fixed.
- Notifications > Previously, when clicking on Notifications that alerted of a scheduled ACH payment, Core would redirect a user to the Payments screen although the payment had not yet been settled. This was fixed.
- Opportunities > Marking an Opportunity as Won from the Opportunities list view didn't update the Closed Date until the page was refreshed. This was fixed.
- Opportunities > Mobile and contact hyperlinked numbers were incorrectly launching a mail service wizard from within the Opportunities details. This has been fixed.
- Opportunities > The Quotes tab of an opportunity's detail page was missing the ability to delete a Quote from the list. This was fixed.
- Opportunities > When batch updating records from the Opportunities list view, any applied filters disappeared after the update was saved. This was fixed.
- Payments > Creating a Payment for an Invoice that had Online Payments enabled and was linked to a Vendor Bill would auto-fill the wrong date when a user was redirected to the Create Bill Payments page. This was fixed.
- Payments > When applying a new Payment in the Payments screen, Core was allowing users to double click the Save & Done buttons and it was incorrectly creating duplicate payments. This has been fixed.
- Project Templates > When assigning Groups to either Team Members, Activity or Expense Items, the pop-up modal would only load a maximum list of 25 Groups for each category. This was fixed.
- Projects > Adding a phase whose name includes parentheses caused a capitalization error. This was fixed.
- Proposals > After previewing a Proposal from the Proposals list screen, previewing any other Proposal in the same screen would always show that first Proposal preview until the page was refreshed. This was fixed.
- Proposals > The Create from Scratch option only took users to the Create page if they clicked on the words directly and did not include the rest of the button space. This was fixed.
- Proposals > When adding a Smart Field in the Proposal Builder, the smart field dropdown was incorrectly labeled. This was fixed.

- Prospects > When sorting the Prospects list view by Prospect Score, an ellipse icon was displayed instead of a caret. This was fixed.
- Quotes > When using the quick search to find a record in the Quotes list view, the search was not saved when returning to the list view from a Quote detail page. This was fixed.
- Recurring Transactions > We have added several checks to pre-empt scenarios which could lead to issues like duplicate processing of transactions etc. for recurring transactions.
- Reports > Group by Principal / Originator was not working on all AR Aging reports. This was fixed.
- Reports > The Ship To address was not properly formatted in the Purchase Order Invoice report. This was fixed.
- Reports > The Time and Expense report was not correctly filtering specific dates for users outside of the U.S. This was fixed.
- Reports > The Totals line for a project was not properly aligned in the Project Time Entries report. This was fixed.
- Resource Library > When uploading multiple items to the Resource Library, users were not getting a Successful Update prompt when the operation was a success. This has been fixed.
- Sales Goals, Dashboard > Sales Goals were incorrectly allowed to have negative goal amounts which would display inaccurate graphs on the Sales Goals Performance widget. This was fixed.
- Scheduled Reports > Few users had complained that they were not able to re-use group names of Scheduled Reports they had previously deleted. This was fixed.
- Scheduled Reports > When scheduling a Report using the Choose from Existing Group option, the Subject line was not visible. This has been fixed.
- Scheduled Reports > When updating an existing Scheduled Report, an error alert would flash before the success message. This has been fixed.
- Security > Previously, Time Expense security users could view other users' records using the on-screen reports under the More drop-down. This has been fixed.
- Time Card > When copying a week's worth of Time Card entries to a new week using the custom date picker, the date picker would pick the incorrect start and end dates for the week of the day that was selected. This was fixed.
- Vendor Bills > Units were not properly updating when importing a Purchase Order into a Vendor Bill. This has been fixed.
- Vendor Bills > When setting up a daily recurring Vendor Bill with a fixed end date, duplicate Vendor Bills were being created for dates outside of the end date. This was fixed.
- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes

What's new in this version?

This update addressed several issues and added many highly requested features. Most notable:

Stripe ACH Transfers
The power of ACH Transfers comes to Core. Stripe ACH Transfer option will allow you to confidently share ACH payment enabled Invoices with your clients. Stripe ACH is backed with instant bank verification from Plaid.com to ensure a smooth, hassle free money transfer. All of this comes to Core customers at an incredibly low processing fee from Stripe. Getting paid on time has never been easier in Core!

Cloud Feed CSV
Core Cloud Feeds have been enhanced to allow importing accounts and records via CSV files. Users now have the ability to add new Accounts to Core without having to link their financial institution. Additionally, Bank and Credit Card Transactions can now be imported for any account. Our intuitive step-by-step wizard walks you through the import process so you can be sure you import the appropriate records to Core.

Workflow Notification Emails
Workflow emails sent to Managers for review have been redesigned to increase their usability and help streamline daily tasks. This enhancement will help automate how you manage your employees' submitted Time and Expenses, Invoices, Purchase Orders and Vendor Bills. Managers can now initiate the approval or rejection of the submitted items from the email and be redirected to the appropriate Core screen for confirmation. Managers can also review the details of these entries before deciding to approve or reject them. Managing your Company's various workflows has never been easier in Core.

Transfer Retainers

Client and Project Retainers can now be easily transferred between Clients and Projects directly from the Retainers screen. All the related adjustment entries will be automatically made in the background and show up on retainer reports and screens. Managing your Client and Project Retainers is now easier in Core.

Benefits Summary

We have introduced helpful controls and settings to allow your employees to better understand their benefit summary. Employees can now choose to get a YTD summary of their assigned benefits and also switch from Hours to Days view. HR admins can also set up a rounding option for benefit calculations.

Custom Fields and Document Uploads for More Modules

The ability to create and use custom fields have been added for more modules in Core including Purchase Orders, Vendor Bills, Payments, Credit Cards, Credit Memos, and Vendor Credits. Create custom fields to track any value that Core does not already cover and is important to keep track of for your business. Additionally, the ability to upload documents has been expanded to more modules including Vendor Credits, Credit Memos, and the Company Profile. Organize and keep track of all the relevant documents for a specific record in one place.

Report Center enhancements

Core's Report Center continues to be enhanced in this release. Reports filters can now be toggled on and off to easily run a report with no filters without losing your saved configuration. Additionally, Scheduled Reports can now be sent in either PDF or Excel format.

Other Improvements:

- Benefits > A Global Settings option to configure how Human Resources Benefits data is displayed has been added. The number of digits after the decimal point can now be set for display whenever Benefits data is shown throughout Core.
- Campaigns > An Email column was added for adding individuals in the Add Recipients window of a campaign.
- Cloud Feeds > Quick Refresh has been added as a Batch Action to the Cloud Feeds list view.
- CRM > Files stored in the Resource Library can now be emailed directly from the Resource Library screen. Files can be sent individually via row action or as a group via batch action.
- CRM > Follow-Ups have been updated on the CRM master lists to allow review and editing of all existing Follow-ups for a particular record.

- CRM > Leads and Prospects details screens have been enhanced to show a history of all changes made to a record. The log has important details like date and time of change, who made the change and the value that was changed.
- CRM > Users who have the right permissions, will now be allowed to delete Email history from the CRM module.
- Dashboard > The Time Performance widget now displays the percentage of the selected part of the doughnut chart.
- Emails > Core has been enhanced to notify when an outgoing email bounced back. The system notifications will alert you with the relevant details of the unsuccessful email.
- ePayments > Users can now quickly access the Payment Portal link that is sent to your Clients when ePayments are enabled. This can be accessed from within the Invoice details screen. The link to the Payment Portal can also be easily copied from the details screen.
- ePayments> We are now sending email notifications to more internal users, like Project Manager and Biller when an ePayment is processed successfully.
- Expense Entries, Time Entries, Leads > Custom field values can now be displayed as optional columns in the list view screens for Expenses, Time Entries, and Leads.
- Follow-Ups > The Follow-Ups screen can now be quickly filtered to show All Follow-Ups or just Follow-Ups for My Leads, My Prospects or My Opportunities.
- Forecasting > All Forecasting screens now have a Project Status filter.
- Forecasting > Filter options have been expanded in the various tabs to include Projects, Item Status and Billable Status.
- Forecasting> We are now persisting the headers when scrolling the list of Allocations.
- General > Drop-downs with multiple columns are now resizable.
- Integrations > A default tax code for Vendor Bills in QuickBooks online sync settings has been added.
- Integrations > Core Expenses can now be synced as Bills to Xero.
- Integrations > Integrations with third party accounting software have been updated to restrict syncing zero ($0) value phased Invoices from Core.
- Leads > Lead Score was added as an optional column in the list view.
- Leads > Leads can now be assigned to a Campaign and the list view screen can now be filtered by Lead Source.
- Opportunities > Users can now specify the Project Template they want to use at the Opportunity level.
- Opportunities > When converting an Opportunity to a Project, Core gives you the option to bring over the project template phase structure as well as service and expense line items used in the primary Quote.
- Projects > Quick search now includes Project name and Phase description when returning search results.
- Proposals > The Proposal templates screen has been simplified to only show Name, Description, and Status of each record.

- Prospects > An Assigned To column was added to the Prospects list view screen so users can sort and filter the list by this value.
- Prospects > Emails sent to a Prospect can now be reviewed from within the Prospect details Emails tab. Email attachments can also be reviewed.
- Prospects > Prospects can now be assigned to Outside Consultants and Contract Employees.
- Prospects > The Lead Source Filter has been added to the Prospects list view.
- Prospects > When converting a Prospect into a Client, Contacts can now be included in the conversion.
- Reports > A Created By column has been added to the Quotes report.
- Reports > All Profit and Loss reports have been enhanced to make them easier to read.
- Reports > All Trial Balance reports have been enhanced to make them easier to read.
- Reports > All Balance Sheet reports have been enhanced with an enhanced design to improve layout and readability.
- Reports > AR reports can now optionally display and filter by a project's Principal.
- Reports > Leads, Prospects and other reports that show Leads and Prospects can now be filtered by "Tags."
- Reports > Saved filters on Reports can now be toggled on and off to easily run a report with no filters without having to delete each one at a time.
- Reports > The Billing Details report has been updated to simplify the header names.
- Reports > The Budget Comparison report has been re-designed to include Services and Expenses Grand Totals.
- Reports > The Project Account Details report has been added to the Billing package.
- Reports > The search feature in the Scheduled and Memorized reports tabs has been expanded to now include matching results in Group Names.
- Reports > The Transaction Details report can now be grouped by Payee.
- Scheduled Reports > Scheduled reports can now be sent in either PDF or Excel format.
- Statements > The Statements list view can now be filtered by Master Project.
- Subscription> "Paid" watermark has been added to system receipts for Core subscription purchases.
- Time Entries > For Legal industry users, L-codes can now be batch updated from the Time Entries screen.
- Time Entries > For Legal industry users, L-codes is now included in the exported .csv file of time entries.
- Trust Fund Accounting > Core has been updated to restrict showing Trust Fund transactions for Matters that have Trust Funds assigned to them.
- Two-Factor Authentication > Answers to the security question were previously case sensitive. Case sensitivity has been removed.
- Two-Factor Authentication > This feature has been restricted to paid users only.

- Two-Factor Authentication > Two-factor authentication users now have the ability to disable their settings without completely clearing them. A separate option to clear all settings has been added as well.
- User Preferences > Users can now customize the number of hours used to consider whether a Time Card is incomplete or not. This will trigger a reminder to fill it out.

Other Fixes:

- Account Reconciliations > When switching between Accounts, the wrong Account was being displayed in Account Drop Down. This has been fixed.
- Allocation & Forecasting > Gantt Chart chips moved in the opposite direction when using the Project or Employee Task Bars for the first time. This has been fixed.
- Chart of Accounts > The count of selected Accounts in the disclaimer of the batch delete window does not include sub-accounts. This was fixed.
- Chart of Accounts > The KPIs on the list view screen do not change based on any applied filters. This was fixed.
- Cloud Feeds> A specific scenario would cause feeds to duplicate on scrolling. This was fixed.
- Custom Fields > Custom fields added for Projects from the Custom Fields list screen are not displayed in a Project's detail view in the order they were added. This was fixed.
- Dashboard > Some icons in the Add Dashboard Widget modal of the dashboard were not showing. This was fixed.
- Dashboard > The default filter applied for the Hours widget was 12 weeks, but the graph only displayed the last 4 months. This was fixed.
- Dashboard > The Project Allocation widget incorrectly displayed a Project with phases when any filter was applied. This was fixed.
- Dashboard > The Project Status widget was not properly displaying projects with a due date in the next month when applying a Due Date filter for next month. This was fixed.
- Documents > The filter panel in the Documents list view did not correctly display the applied "Created By" filter value. This was fixed.
- Email > If an email address was manually typed into the address line and didn't match one of the existing autocomplete options, the email typed was erased. This was fixed.
- Emails > After manually typing out an email address, clicking in the line to focus caused the email address to disappear. This was fixed.
- Emails > The Message label of an email's detail view was not placed in the right location. This was fixed.
- Emails > Using the backspace key to remove an email from the address key did not successfully remove the email. This was fixed.

- Emails > When emailing Statements, the compose email screen was not populating pre-set TO, CC or BCC values depending on what action was taken to launch this screen. This has been fixed.
- Financial Budgets > The page tab title did not match the page screen title. This was fixed.
- General > Custom labeling for projects of some industries did not persist in dropdowns. This was fixed.
- General> Users would no longer see the menu items if they clicked on an item they were not subscribed to. This was corrected.
- Global Settings > Custom labeling for vendors was not properly applied in the Edit Vendor Credit page tab title. This was fixed.
- Integrations > Core Integrations were not syncing correctly for a Standard user with any Custom security profile other than the Full Access security profile. This was fixed.
- Integrations > In some cases when manually entering a date into a date field of the Sync Settings tab, the date picker functionality would be disabled. This was fixed.
- Invoice Collections > The Email column in the list view screen was not displaying when selected in the optional columns. This was fixed.
- Invoice Collections > The Invoice Collections list view had issues sorting records by the Terms column. This was fixed.
- Leads > Previewing the attached file when viewing the details of an email sent to lead was not working. This was fixed.
- Leads, Prospects > When changing any field value that was not the Assigned To field, the Assigned-On field value was erased. This was fixed.
- Projects > Changing the default group assigned to a Project did not successfully save. This was fixed.
- Projects > When adding a phase to a multi-phased Project, the percentage complete field was being incorrectly auto-filled in some cases. This was fixed.
- PTO > The "Requested For" label was incorrectly duplicated in the add/edit PTO request screen. This was fixed.
- Reports > The Trust Fund Account Activity report was not displaying all purchase order numbers when applying a purchase order number filter. This was fixed.
- Reports > When a company's currency was set to "Euros", the Time and Expenses by Parent Project report incorrectly displayed amounts using US dollar signs. This was fixed.
- Sales Goals > The page title and tab title did not match. This was fixed.
- Time & Expense Reviewer > Sorting by the Type column did not sort the list correctly. This was fixed.
- Two-Factor Authentication > Some users were getting an error while sending the verification code for two-factor authentication set up. This was fixed.
- Updated report templates.
- Updated help and other documentation.

- Numerous other medium and minor level fixes

VERSION 1.1.148 RELEASED ON JULY 25, 2020

What's new in this version?

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

2-Factor Authentication

We have added an extra layer of security that goes beyond a username and password. Users now have an option to turn on 2 FA on their accounts and choose from text, voice call or email as authentication options.

Toggle Filters

Filters on list view screens can now be toggled on and off. In case you want to review an unfiltered list, you can simply disable your applied filters and turn them back on when needed. This way, you spend less time constantly clearing then reapplying filters when trying to view a list with varying parameters.

Improved Account Reconciliations

We have added a "Reconciliations" screen that is accessible from the main navigation to simplify the path for reconciling accounts. Other improvements include easy to print summarized and detailed reports and an option to print them immediately after finalizing a reconciliation.

Contact look up in Email

Emailing your clients, vendors or employees from Core has been made easier with automatic contact lookup or select multiple recipients from an address book pop up. Users can now look up any specific contact, including groups, using either a name or email. Email

composition retains the ability to add unlimited email recipients by entering an email address directly.

Create Time entries from Events

Users now have the added ability to create time entries directly from a calendar event. The associated project and hourly duration are prefilled to simplify this time entry creation process.

Core Express Subscription Bundle

Core is proud to announce a new discounted pricing bundle for companies with up to 5 users.

Other improvements:

- Account Reconciliation > Users will now have an option to generate a summarized or detailed report after finalizing an account reconciliation.
- Account Reconciliations > The account reconciliation experience has been improved to better track large checks and deposits that correspond to multiple projects or vendor payments.
- Account Reconciliations > Users can now run Reconciliation reports directly from the Reconciliation screen.
- Allocation & Forecasting > The Allocation & Forecasting view and widgets can now be filtered by Principal and Originator.
- Bill Payments > A column has been added for expense entry date to the details pop up of employee reimbursables.
- Chart of Accounts, Fund Transfers > Users can now upload documents for fund transfers and individual accounts in the Chart of Accounts.
- Chart of Accounts > Parent Account balance amounts now include balances for all of its sub-accounts when the accounts are being displayed in a hierarchical manner.
- Chart of Accounts > The Account type drop down in "Create New Account" now conforms to an accountant friendly display order.
- Checks > Checks can now be batch updated on the Checks list view screen.
- Checks > The Bill Payment column has been added to the Checks list view to denote checks used to pay bills.
- Clients, Employees, Vendors, Prospects > Individual contacts listed in the Contacts tab now have their own active status.
- Cloud Feeds > We added a "Quick Refresh" action that allows users to refresh their account without invoking the refresh UI.

* This action is available once every 24 hours and cannot be performed for accounts that need MFA code or Captcha to perform a refresh.

- Contacts > Contact Status has been added to the Contacts detail views throughout Core.
- CRM > Attachments can now be added to Prospects, Opportunities and Quotes from their respective list views.
- CRM > Elaborate tooltips have been added throughout the CRM module.
- CRM > Grand totals have been added to the Opportunity list view for Closed Amounts
- CRM > Newly added CRM screens were missing record counts on list views. These counts have been added.
- Dashboard > The Staff Utilization widget was updated to display the total utilization percentage for all employees.
- Dashboard > The Staff Work Load widget will now roll up all allocation data to the resource level.
- Dashboard > The To-Do widget can now be filtered by Status.
- Emails > Users can now specify recipients in the compose email screen using quick search or address book pop up.
- Emails > The file size allowed for email attachments has been increased to 10 MB.
- Emails > Files can now be dragged and dropped anywhere on the compose Email screen to attach the document.
- Emails > Users will now be prompted when a subject line is not set for any outgoing Email.
- Employee Control > A column has been added to the Employee Control details to differentiate Projects from Project Groups.
- General > Custom fields are now supported for more modules like General Journal, Checks, Chart of Accounts, Deposits, and Fund Transfers.
- General > The link to reorder the menu items of the side navigation was relocated to the bottom of the navigation menu.
- General > The logo by industry feature was further enhanced to provide separate logos for Architectural and Engineering industries.
- General > To improve the column resizing experience in the Time Entry and T&E Reviewer screens, a suggested best fit option is provided.
- Global Settings > 'Invoice Due Date' was added as a smart field option to insert in global email settings.
- Global Settings > Administrators can now configure the custom labels for CRM modules including Leads, Prospects, Quotes, Proposals, Campaigns and Promotions.
- Integrations > QuickBooks users can now send multiple Core employee expenses to the same vendor bill in QuickBooks.
- Integrations > Users can now include purchase tax amount when sending Vendor Bills to AccountRight.

- Invoices > A filter to display invoices with or without a discount has been added to the Invoices screen.
- Invoices > The invoice list view screen can now be filtered by Client Group and Project Group.
- Leads > When converting a lead into a prospect, users are given the option to transfer any notes, to-dos, emails, and campaigns during the conversion.
- Leads > The "Import from CSV" feature now allows users to specify mapping for more fields.
- Legal > "Expenses" will now be custom labeled "Costs" by default when a Core account is created for a Legal industry client.
- Notifications > Users will now be presented with more context like the name of the client etc. when notifying them about successful processing of recurring transactions.
- Opportunities > When creating an opportunity, the Forecast value now automatically defaults to any amount already entered for the Opportunity Value.
- Opportunities > The Quotes tab in an Opportunities detail view now has a field to denote if a Quote Template is being used.
- Projects > The ability to search the list view by Client, Manager, City, State, and custom field values has been added.
- Projects, Clients > Users can now specify the date range to filter transactions in the Transactions tab of the detail view.
- Projects > When creating a Project from a Project template, the Fee Schedule will also get cloned to the new Project.
- Projects > When creating an Invoice from a Project's opening balance, users will now be presented with the details on successfully adding the transaction.
- Proposals > Proposal Builder has been updated to limit inserting new quotes based on existing Templates only.
- Prospects > The email field is displayed by default when adding a new Prospect.
- Purchase Orders > Users can now send multiple purchase orders as separate attachments in one email.
- Quotes > A Created By filter was added to the Quotes list view screen.
- Quotes > A "Created By" column was added to the Quotes list view screen.
- Registers > The register account has been moved to the top of the screen for a better user experience and overall consistency.
- Reports > Project Start Date and Project Due Date filters were added to all Allocation & Forecasting reports.
- Reports > Users can now filter the Workflow Details report by specific employees.
- Reports > A column with contact number has been added to the Follow-Ups report.
- Reports > Next Week and Next Month have been added as date options for Allocation Start and End Dates.
- Reports > Security reports were missing the option to choose the output format. This was added.

- Reports > The Retainer Details by Project report now has the option to show or hide Zero Balances.
- Reports > The Sales Goal Performance and Sales Goal by Employee reports were updated to handle employee groups.
- Reports > The Work in Hand report now has the option to include or exclude Work in Progress amounts in the contract balances.
- Retainer Invoices > The retainer invoice message can now be edited or turned off in global settings.
- Scheduled Reports > Users now have the ability to control the subject line in scheduled report emails.
- Search > Global search has been updated to include CRM module results.
- Security > As added security, users who use the Forgot Password to reset their password will receive an email letting them know that the password has been updated.
- Statements > Billing users can narrow down statement generation by using newly added filters like Project groups and Client Groups.
- Subscriptions > When an owner account logs into Core and the company has expired or has subscriptions in grace days, they will be directed to the Manage Subscriptions screen.
- Time and Expense > Time, Expense and Reviewer list views can now be filtered by Invoice Number.
- Time Card > For legal industry users, the L-code column was added as an optional column instead of always displaying it.
- Time Card > Managers now have the ability to approve Time Entries directly from the Time Card screen.
- Time Card > We have enhanced the "Copy From" and "Copy To" functions and added the total of logged hours in the destination or source week.
- Time Entries > If a user had no privilege to approve entries, then these options have been removed from the Time and Expense user.
- User Preferences > Users can now set a reminder to check their incomplete time cards from the previous week.
- User Preferences > Users can now set CRM modules as the default screen when logging into Core.
- User Preferences > Users can now set HR modules as the default screen when logging into Core.
- Vendor Bills > The ability to batch update the date, reference number, term, due date, and memo of selected vendor bills in batch was added.
- Vendor Bills > Users can now see and edit the bill rate for each line item when creating or editing a vendor bill.
- Vendor Bills > The Project or Phase on a Vendor Bill can now be changed after it has been paid.

Other fixes:

- Campaigns, Leads, Prospects > The date of a note is not consistent in the list view and the detail view of a campaign, lead, or prospect. This was fixed.
- Follow Ups > The batch update feature in the Follow Ups screen does not successfully update the follow-up status from Inactive to Active. This was fixed.
- Follow Ups > When clicking an email address in the hover dialog, the default mail application was not opened to send an email. This was fixed.
- Follow Ups > When moving the cursor to the View Lead Details link of the hover state dialog, it disappears before you can click it. This was fixed.
- Incidents > When creating a new incident, descriptions are cut off if they exceed a 255-character count instead of saving the entire note. This was fixed.
- Integrations > When syncing Bills and Purchase Orders from Core to Xero, the tax code specified at the Account level was fetched instead of the one at the item level for each transaction. This was fixed.
- Invoices > Formatted memos on Invoices would display HTML when saved. This was fixed.
- Leads > Any notes, to-dos, or campaigns associated with a lead is not carried over when it is cloned. This was fixed.
- Leads > Batch updating leads from the list view did not successfully update the lead cost, country, or memo fields. This was fixed.
- Leads > When converting a lead into a prospect, the default probability value in the modal was not consistently at 25% when converting from the list view and the details view. This was fixed.
- Leads > Notes, to-dos, and tags were not carried over when a Lead is converted into a Prospect. This was fixed.
- Legal > The Project column on the Invoice Collection screen was incorrectly displaying the name of the Client instead of the Project when a Split Bill Invoice was used. This was fixed.
- Lists > Attaching files from the Resource Library to certain Expense Item in the Lists module would result in an error. This was fixed.
- Notes > Notes were not automatically created when emailing Proposals and Campaigns. This has been updated.
- Opportunities > Totals were not displaying a correct sum in the list view. This was fixed.
- Opportunities > Not specifying a Closed-on Date when marking an Opportunity as Won from the list view screen would result in a system error. This was fixed.
- Proposals > The template and format of a Quote inserted into a Proposal does not match what is displayed in the email sent. This was fixed.
- Proposals > Too many columns were displayed in the Proposals list view by default and a Created by Date, Opportunity, Proposal, Prospect, and description were not included in the optional column list. This was fixed.

- Prospects > In the Opportunities tab of a prospect's detail view, the Forecast field of the Add New Opportunity dialog does not pre-fill to display any amount already entered in the Opportunity Value field on focus. This was fixed.
- Prospects > In the Opportunities tab of a Prospect's detail view, the Total Opportunity Value KPI on top of the opportunity list was displaying an incorrect summed value. This was corrected.
- Prospects > When creating a new prospect based on an existing record, the list of client options disappears when sorting by the Contact column. This was fixed.
- Prospects > Prospect filter panel was only displaying Active Prospects. This has been updated to also show Inactive Prospects.
- Prospects > The Opportunities tab in Prospect details was missing totals for value and closed amount. These have been added.
- Reports > Applying the "Last Semi Monthly" date filter on reports would result in system errors. This was fixed
- Reports > Leads reports were only accounting for Leads with a Pending status. This was fixed.
- Scheduled Reports > Some scheduled reports with the 'Last Week' date filter applied were sending incorrect data. This was fixed.
- Time Card, Reports > The Employee Time Card (Weekly View) report does not differentiate time entries by unique description values. This was fixed.
- Vendor Bills > The vendor bill batch email option has been restricted to 25 records at a time.
- Vendors > Country currency labels change when selecting an option in the Currency dropdown of a vendor's detail page. This was fixed.
- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes

VERSION 1.1.147 RELEASED ON JUNE 6, 2020

What's new in this version?

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

Introducing Core CRM (Beta)

- Fully Integrated Client relationship management system.
- Designed for the Professional services industry.

- All-in-one CRM solution that compliments existing CORE platform.
- Centralized system to track your Leads and their progress through your sales pipeline.
- Help manage your Sales/Business development team's daily tasks and assignments using our comprehensive Follow-Up screen.
- New set of reports specific to CRM metrics such as Campaign Performance, Promotion Code Usage and much more.
- Build, customize and email Quotes and Proposals directly in Core CRM.
- Generate Promotions and Campaigns within CORE and track their performance to optimize return on investment.
- Powerful, real-time dashboard widgets to track Sales Goal Performance, Sales Velocity and much more.
- No fees, zero obligation CRM subscription until September 30, 2020.

Copy Time Card

This much awaited feature will allow users to copy existing Time Cards to any selected week. We have added two powerful copy options: "Copy From" and "Copy To" to give our users total control over their Time Cards and will allow them to submit in a matter of seconds.

Customizable Navigation

Core users can now control the order of menu items and keep it unique to their preferences. An edit icon placed on the navigation menu leads users to an elaborate UI that allows easy menu item re-ordering.

Update your To-Dos

All Core users can now report progress on assigned To-Dos directly from the Dashboard. The newly designed To-Do widget allows easy update of percent complete and adds more context to the assigned To-dos.

Documents for Check & Credit Cards

The ability to attach documents to checks and credit cards has been added so that necessary documents can be uploaded for these types of transactions.

Other improvements:

- Bill Payments> Check numbers will now be automatically added into the memo when making a Bill Payment with a check or credit card.
- Cloud Feeds> The search function has been added to Cloud Feeds in the Find Match flow.
- Dashboard> Dashboard Accounting widgets are now reflecting Accrual or Cash basis as defined in Global Settings. Users also have the option to choose the accounting option in the widget itself.
- Dashboard> Enhancements have been made to the Project Allocation by Task widget to enable filtering by Employee, widening the Project column, and adding Resource as a group.
- Dashboard> The Project Allocation widget was missing a total row. This has been added.
- General> Batch update operations have been limited to 5000 records per batch.
- Integrations> Split Billing type Invoices are now getting properly synced to XERO and AccountRight.
- Payments> "Type" column was added to the payment disbursement window to differentiate services and expenses.
- Payments> The Payment Disbursement screen can now be sorted by any column.
- Project Templates> Assignments have been added to Project Templates.
- Projects> The Project Templates option in the More menu has been separated from other options to make it easier to find.
- Project Templates> Users can now assign Fee Schedules, Budgets, and Estimates to Project Templates.
- Reports> A new report was added to list all Scheduled Report details.
- Reports> An individual Employee filter was added to the Employee Time Card Summary report.
- Reports> An option to hide phases when running a Project List report has been added.
- Time and Expense> Users can now choose from various write down / mark down options when assigning time and expense entries to an invoice directly from the Time Entries, Expense Entries and Reviewer screens
- Time Card> An additional column has been added to Legal industry Time Cards to denote L-Code for your activities.
- Trust Fund Accounting> Trust Fund summaries are now supported on all Core Invoice Templates.
- Vendor Bills> Payments Status filter has been updated to allow multiple options to be applied at once.

Other fixes:

- Accounting> There were incorrect restrictions for DCAA compliance that were preventing a user from entering Vendor Bills that included Time and Expenses. This was fixed.
- Clients> Search capability was not working properly in the City field dropdown. This was fixed.
- Clients> The "All Projects" option disappears in the Performance tab Project dropdown after selecting a different project. This was fixed.
- Credit Cards> Changes to Expense Entries linked with a Credit Card were not syncing correctly between both modules. This was fixed.
- Credit Memos> The class field value was not able to be removed after saving. This was fixed.
- Credit Memos> When saving /updating credit memo without class field, class would get displayed as required. This was fixed.
- Currency Manager> The Currency Manager screen did not allow an assigned multiplier value to exceed 7 digits. This was fixed.
- Currency Manager> The Cayman Islands currency was incorrectly displaying the pound symbol instead of the dollar sign. This was fixed.
- Currency Manager> The search bar on this screen was not successfully returning results. This was fixed.
- Custom labels > Activity and Expense custom labels were not reflecting correctly throughout Assignments. This was fixed.
- Dashboard & Invoices> Time entries recorded against sub-phases were not counted in the Totals row. This was fixed.
- Dashboard. If any Invoices had been created for Inactive or On Hold Projects, the Project Gross Margin widget would unnecessarily display 0 values. This was fixed.
- Dashboard> When filtering the Expense Performance widget to display Invoices for all dates, an error would occur when scrolling to the bottom. This was fixed.
- Dashboard> The PTO widget did not account for negative benefit usage values like other HR modules do. This was fixed.
- Dashboard> The utilization percentage displayed in the Staff Utilization widget did not match the same percentage displayed in the Employee Performance screen. This was fixed.
- Documents> Sorting the list of an Invoice's existing documents would throw an exception. This was fixed.
- ePayments> Due date or Custom date payment options should not have appeared once the Payment was overdue. This was fixed.
- ePayments> Retainer invoices that had ePayments enabled were throwing API Errors. This was fixed.
- Financial Budgets> Allowing users to edit a Financial Budget's time period caused an error. This was fixed.
- Financial Budgets> Budgeted amounts for each interval were not dividing correctly when switching between annual, quarterly, and monthly views. This was fixed.

- Financial Budgets> The "Hide Blank Rows" action would hide account category rows when it should have only hidden individual account rows. This was fixed.
- Gantt Chart> Incorrect start and end dates were being displayed when exporting a phased parent project Gantt view as a PDF. This was fixed.
- General Journal> Clicking either "Save & Done" or "Save & Add Another" when creating a General Journal entry redirected the user to the Dashboard instead of the correct General Journal screen. This was fixed.
- Global Settings> Users who enabled DCAA and used a hash "#" in their password were unable to disable it afterwards. This was fixed.
- Groups> When changes were made to security settings and reverted back, access was not fully granted back. This was fixed.
- Integrations> When successfully syncing expenses from QBO to Core, Core would use the same alert that was used to depict a sync failure. This has been updated to reflect a successful sync.
- Integrations> DCAA compliance settings were causing issues with Xero, QBO and AccountRight. This was fixed.
- Invoice Collections> Invoice Collections screen was reflecting incorrect Retainer Available numbers. This was fixed.
- Invoice Collections> The Client column was incorrectly labeled as an Invoice column when exporting the list as a .CSV. This was fixed.
- Invoices>When trying to void a manual invoice that had been manually paid, an API error was thrown. This was fixed.
- Invoices> Invoice records on the list view screen would disappear when sorting by Class. This was fixed.
- Invoices> When 2 draft Invoices were finalized at the same time for a Project that used custom Invoice numbers, only 1 finalized Invoice reflected the custom Invoice number while the other did not. This was fixed.
- Invoices> When filtering by a Project Manager in the Invoices list view, the selected Project Manager name was displayed incorrectly in the filter details section. This was fixed.
- Messages> When searching for a name in the TO field of the Message Composition screen, the search did not return proper results. This was fixed.

- Payments> General Journal entries were not being created for credit or write-off payment types. This was fixed.
- Payments> Payments screen allowed multiple clicks on the Pay button which would lead to duplicate payments being created. This was fixed.
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- Projects> Column resizing in the list view were not being persisted and applied anymore after reloading the page. This was fixed.
- Projects> Phase order was lost when cloning a project. This was fixed.

- Projects> Showing duplicate records for vendors when assigning as a team member in project details. This was fixed.
- Projects> Using fractional percentages on split billed projects would round up percentage values and could cause totals to go over 100%. This was corrected.
- PTO> Request Approval email notifications were displaying the date the request was made instead of the date requested off. This was fixed.
- Reports > Document reports were not showing the correct file size Grand Totals. This has been corrected.
- Reports> Incorrect applied filter details were being displayed on the Percentage Billed report. This was fixed.
- Reports> The Balance Sheet Accrual by Project and P&L Accrual by Project reports were not applying custom labels correctly. This was fixed.
- Reports> The Statement report was generating extra blank pages. This was fixed.
- Reports> Time Details report displayed an incorrect stop time for time entries. This was fixed.
- Search> When applying discrete filters and searching together in a list view, and then clearing the applied filters, the value in the search box was also cleared. This has been fixed.
- Time & Expense Reviewer> Changes made to an entry's description field from the list view were not being successfully saved after clicking Done even though a success message was shown. This was fixed.
- Time & Expense Reviewer> When specifying a custom date range, the placeholder text for the From and To fields was not reflecting the correct date format. This was corrected.
- Time & Expense> When a time entry was entered on behalf of another employee and then rejected by a manager, the rejection notice was incorrectly sent to the employee who made the time entry instead of the employee whose time was rejected. This was fixed.
- Time & Expense> In the Time and Expense Entry details screens, the Created On Date has been moved next to the Entry Date in the General tab.
- Time Card> The "Remove Blank Rows" action should have removed all blank rows in the time card; however, if this action was used with a few rows selected, then only the selected blank rows should have been removed. This was fixed.
- Time Entries> Users could not update the billable status from the Edit Time Entry screen for fixed Projects. This was fixed.
- To-Dos> Some To-Dos that had attachments were not reflecting this information correctly from the list view. This was fixed.
- Vendor Bills> When creating a new Vendor Bill,
- searching by a Vendor's last name would not display any results. This was fixed.
- Vendors> An error was thrown when converting a vendor with saved notes into an employee. This was fixed.
- Vendors> When a vendor already has a saved memo, the details tab continued to show "Add Memo" instead of "Show memo". This was corrected.

- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes

VERSION 1.1.146 RELEASED ON APRIL 18, 2020

What's new in this version?

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

Trust Fund Account Management

We are proud to announce that we have added Trust/IOLTA account management, a very popular feature in the Legal industry. This powerful enhancement will allow users to manage and report on a client's funds separately from their firm's operative bank accounts and comes packed with reports and widgets that allow tracking Trust funds by matter and 3-way account reconciliation that can be run for each statement period.

Guaranteed payments with Scheduled ePayments

Never miss another ePayment from your Client because the Invoice was not due yet. We have enhanced our ePayments feature to allow your Clients to schedule payments on any date of their choice. As long as the scheduled payment date falls on or before the Invoice due date, your Clients can choose when to pay and also be able to make any changes right from the ePayment page for the specific invoice.

Rates by Classification

This powerful feature that is turned on by a project rule, allows your Fee Schedules to pivot on employee classifications. Define specific or general classification rate rules in your Fee Schedules and this new feature will auto populate the new rates based on the classification selected for the time entry.

Advanced Report Filters

Create powerful reports based on advanced filtering that supports And, Or and Not combinations. Also, Core reports now print the applied filters at the top of each report to add more context to the report.

Filter preview

By popular demand, we have added aesthetically designed filters segments that provide a sneak preview of the filters applied to any of the Core list views. Users can click on these segments to see the full list of filters and also continue to add or remove the filters from the panel view.

'Mark as Billed' with Invoice number

This powerful enhancement in the Time and Expense reviewer allows billing managers to associate unbilled entries to previous invoices, and handle it for multiple projects at the same time.

Know your allocations

Added a brand new 'Task Allocations' widget that displays assigned tasks with complete details including allocated, used and remaining hours and is easily filterable by Project, Employee and date ranges. T&E users also have been allowed restricted access to Allocations screen to view their tasks in a list view.

Other improvements:

- Allocation & Forecasting> Employee manager filter has been added to allow managers to easily view the tasks of all the employees they manage.
- Allocation & Forecasting> More validation rules have been added in the '+Add' window to help users make sure they add allocations correctly.
- Batch Invoices> A new global setting (Master>Charge Item taxes in addition to Contract Amount) now controls if the net bill algorithm should exclude item-level taxes when processing an invoice using the percent complete option.
- Batch Invoices> There have been several important enhancements in this screen including automatically combining an unlimited number of phases, performance

optimization that makes the create batch Invoice process 50% faster and a better user experience for Phased, Joint and Split Invoices.

- Budgets, Estimates> Select multiple records to send together in one email instead of individually emailing one at a time.
- Budgets, Estimates, Fee Schedules, and Financial Budgets> The search bar in the 'Create from Existing' window was relocated for scalability and clarifying what users can search.
- Cloud Feeds> The account setup experience has been updated to address the issue of orphan accounts being created before the process was completed.
- Cloud Feeds> We now append the institution account number to better identify the third-party institution account when adding new accounts to Core.
- Currency Manager> Added 'New Taiwan Dollar' as a new currency in Core.
- Dashboard> Drill down into the details of the data displayed in the Account Balances widget by opening the Account Registers report straight from the widget.
- Dashboard> Drill down into the details of the data displayed in the Expense Performance widget by opening the Billed time & Expenses report straight from the widget.
- Dashboard> As part of the Trust accounting update, a new 'Trust Fund Balances' widget has been added to the Dashboard to allow easy read-access to your trust fund balances.
- ePayments> We have added more options to allow users to control the ePayment email message including an override for the stock message.
- ePayments> We have redesigned the 'Pay' button and also listed all supported credit cards on the Client payment page.
- ePayments> We have added a 'View Invoice' link on the Payment page to preview the original invoice.
- Expense Entry> A 'Classification' column has been added to the Expense Entry list view.
- Financial Budgets> A tooltip was added to elaborate on the purpose of using a reference year when creating a financial budget.
- Financial Budgets> Easily expand or collapse all rows at once when editing a financial budget.
- Financial Budgets> In the batch update dialog, a field is auto-checked when a value is entered.
- Financial Budgets> The data displayed in the reference column now updates to show actual numbers from specific time periods of the selected reference year based on the column the user is currently editing.
- General> Core has added a second confirmation step before batch actions are executed to prevent unwanted changes to large record sets.
- General> Core's customer services contact information can now be accessed within the application from the Help menu.

- General> We have made several enhancements to our column resizing feature to allow for better user experience. Columns that have been resized already by the user are not affected by modifying any of the other columns.
- Invoice Collections> 'Retainer Available' column has been added to the Invoice Collections list view.
- Invoice Templates> As part of the Trust accounting update, Invoices for matters that have an associated trust fund will have the option to select from invoices templates that display a Trust Fund Summary.
- Invoice Templates> We have enhanced our late fee invoice templates to show the memos associated with the Invoice.
- Invoices> We have added the Batch Update menu that allows users to perform multiple batch updates at the same time.
- Manage Subscriptions> Subscriptions that have been purchased together and set to auto renew at the same interval, will now also be renewed at the same time and a single, consolidated invoice would be generated.
- Manage Users> The filter panel has been added to better manage your users.
- Payments> Accounting users can now directly add payments to their bank accounts when entering a payment. The newly added 'Deposit Account' field will list all their bank accounts as well as the traditional 'Undeposited Funds' account, allowing them to issue a direct deposit to the bank.
- Payments> Expense Account for Credit and Write-Off type payments has been renamed as 'Posting Account' to convey the purpose of this field better.
- Projects> Allow users to choose project attributes to inherit when adding a new phase and also remember their choices for the next time.
- Projects> As part of the Trust accounting update, trust fund activity will now be accessible from within the Transactions tab in Matter details.
- Reconciliations> Bank account reconciliation was further simplified by rolling up bill payment checks to a single entry to match how it appears on the bank statement.
- Registers> See check numbers for a bill payment in the register so you can associate it with the bank statement when reconciling.
- Reports> The Monthly Profit and Loss Accrual and Cash Basis reports now have an added column to display a total for every month.
- Reports> The 'Project List Report' now has the added option of grouping by Master Project.
- Reports> As part of the Trust accounting update, a new 3-way reconciliation report has been added to provide information about reconciled bank balance, book balance and client trust ledger balance.
- Reports> As part of the Trust Fund feature, we have added the 'Trust Fund Account Activity' report that will track Trust funds by client and matter.
- Reports> Benefit Usage reports now round to the nearest quarter hour.

- Reports> 'Client List' report can now be grouped by various options like Client Group and Client Manager.
- Reports> 'Requests for Information' report now allows users to specify if they want to see the Contacts or the Creator of the RFI as a report column.
- Reports> We have extended the drill down feature to all our Financial reports. This update adds this functionality to financial reports that are based on Class and Project accounting.
- Reports> We now allow admin users to rename scheduled report group names.
- Reports> We now print the applied filters on the top of each report but limit the list to 10 or less discrete filters.
- Reviewer> We have added the Hours column to reveal the actual hours associated with the Time entry.
- Security> Access to Performance widget security now also controls access to the List view Info bars in the relevant screens.
- Security> Admin users can now control if Project Managers have access to the 'Forecasting' view and also a separate security to control access to the amount view while forecasting.
- Statements> The selected template in the Statements screen now defaults to the last used template.
- User Preferences> Users can now configure Core drop down searches to be based on 'starts with' or 'wild card matching' principle. Wild card matching is the default setting.

Other fixes:

- Activity> Activity screen did not warn against entering a duplicate Activity. This was fixed.
- Bill Payments> After excluding a negative reimbursable amount from the details window of a bill payment, the pay amount was not being updated accordingly. This was fixed.
- Checks> After making changes to Alignment, Check Style dropdown selection would get refreshed instead of persisting the selected value. This was fixed.
- Client> Performance tab, Project drop down would only include active projects. This was fixed.
- Cloud Feeds> Core did not allow split transactions to be entered with a negative amount. This was corrected.
- Cloud Feeds> Core would allow users to specify multiple payees when adding a check feed as check in split mode. This was corrected.
- Compose email> Configuring global settings to include the client's and the logged in user's email addresses in the CC field would automatically add them without

including a separator and this error would block an invoice email from being sent. This was fixed.

- Dashboard> Employee Allocation & Staff Workload widgets did not work when applying a project and employee group filter at the same time. This was fixed.
- Dashboard> Vendors were included when trying to filter by Employees in the Employee Allocation and Staff Workload widgets. This was fixed.
- Employees> Clicking on the 'Added By' hyperlink in a note's details inconsistently directed a user to the Documents tab when it should have directed the user to the General tab of that employee. This was fixed.
- Expenses> Users were unable to delete an Expense entry that was previously linked to a Credit Card and then unlinked. This was fixed.
- Financial Budgets> The % Changed values of the reference column would not display for account category rows. This was corrected.
- Financial Budgets> The amounts budgeted in each cell would split evenly among all intervals throughout the entire fiscal year when switching between monthly, quarterly, and annual instead of splitting these amounts only within the subsection of a fiscal year. This was fixed.
- Financial Budgets> The current expanded/collapsed view format was not persisting when switching the interval view between monthly, quarterly, and annual. This was fixed.
- Financial Budgets> The reference column was not grouping the value and % changed columns together so that they could be shown or hidden together. This was fixed.
- Financial Budgets> The Save & Done button did not successfully save a financial budget in the create and edit screens. This was fixed.
- Financial Budgets> Updating the Class and Fiscal Year fields while editing a financial budget caused the screen to load the changes indefinitely. This was fixed.
- Financial Budgets> When switching the view between annual, quarterly, and monthly while editing a financial budget, the budgeted amount was lost. This was fixed.
- General> Groups counts have been updated to exclude Inactive Groups.
- Integrations> Split billed invoices were not being properly synced for QBO integrations. This was fixed.
- Invoices> API error occurred when processing multiple phased invoices as final in one batch action. This was fixed.
- Invoices> In a certain scenario, multiple Joint invoices were created when clicking the 'More' button that loads more entries instead of only creating one invoice. This was fixed.
- Invoices> The loading spinner would disappear after the unapproved time/expenses message appears even though the page was not done loading. This was corrected.

- Invoices> Quick adding a project, budget, or estimate when creating an invoice would open duplicate dialog windows. This was fixed.
- Invoices> Invoice date sort would not correctly sort the invoices if they were created on the same day. This was fixed.
- Invoices> Email to Client would not default to Project Billing Contact if Client email was blank. This was fixed.
- Payments> When creating a new payment and selecting a Client but not a Project in the 'Add Payment' dialog, 'Accept as retainer' would fetch all retainer Invoices, including those which did not belong to the selected Client. This was fixed.
- Payments> Billing users were not able to select 'Completed' projects from the Project drop down to record a new payment. This was fixed.
- Payments> Core was not handling cash accounting correctly when a deposited check was marked as bounced. This was fixed.
- Projects> Entries disappeared in 'Add Team Member/Expense/Activity' window while searching and sorting through the list. This was fixed.
- Projects> Main project row in split billing section of Billing Options tab did not follow the name convention set in global settings for labeling projects. This was fixed.
- Projects> Running a Project Time & Expense with Accounts report from the Projects screen did not apply the filters used in the list view. This was fixed.
- Projects> Users who did not have access to add a Team Member, Activity, or Expense were not prompted with this explanation when attempting to add one to a Project. This was corrected.
- Projects> The structure tab would not gracefully handle a situation when the logged-in user had no access to the Project contract amount. This was corrected.
- Projects> Core would not hide the contract amount and cost rate related widget data if the relevant security settings were turned off for the logged-in user. This was fixed.
- QBO Integration> Errors were thrown when re-syncing already-synced Expenses from Core to QBO. This was fixed.
- Reports> Account Transactions report was showing Project and Client filters in the custom field tab. This was fixed.
- Reports> Activity Items filter options were not sorted alphabetically. This was corrected.
- Reports> Any filters set when running a Client List report were not being applied. This was fixed.
- Reports> Bounced check transactions caused an error in the Profit and Loss Cash Basis report calculations. This was fixed.
- Reports> Custom Fields filter section header was missing in the customization widow. This was corrected.
- Reports> Filtering the Project Requests for Information report should only allow users to select individual records and not a range of statuses. This was corrected.

- Reports> The Net Billed amount in the summary section of the Account Register report was not calculating the correct sum. This was fixed.
- Reports> The Retainer Invoice report crashed when applying a Reference Num filter. This was fixed.
- Reports> In select scenarios, Statement report displayed an error instead of a date when using 'As of' date filter. This was fixed.
- Statements> Statement reports have been updated to properly apply 'As Of' date filters.
- Subscriptions> The user interface was not responsive on smaller monitors and this would cause design overlaps. This was fixed.
- Time and Expense> When updating the Activity item and Cost rate of the Time entries linked to a Vendor bill, the Vendor Bill Accounting details were not getting updated accordingly. This was fixed.
- Time and Expense Reviewer> Applying a single Class filter to the Reviewer list screen would always retrieve a blank list. This was fixed.
- Time Card> Allocated hours were not considered in the allocation summary section if a start/end date was not specified in the A&F screen. This was fixed.
- Time Entries> Time entries linked to Vendor Bills, Checks, and Credit Cards would not update when changed for income and expense accounts when using Batch update. This was fixed.
- Time Entries and Vendor Bills> The Project dropdown list becomes empty when reopening the dropdown after scrolling through the entire list the first time it was opened. This was fixed.
- Timers> Deleting a hyperlink document attached to a timer entry causes an error and does not successfully delete the record. This was fixed.
- Vendor Bills> The 'Amount' column in the account tab was incorrectly labeled 'Cost Amount'. This was fixed.
- Xero Integration> Core would throw an error when getting the same name Client or Vendor from Xero. This was fixed.
- Xero Integration> Duplicate records were being created when syncing same name Projects from Xero to Core and vice versa. This was fixed.
- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes

VERSION 1.1.145 RELEASED ON MARCH 07, 2020

What's new in this version?

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

Financial budgets

Create financial budgets to define cost and revenue benchmarks your company can follow in an upcoming fiscal year. This feature comes with reference and input tools to help you make tough budgeting decisions. As the year progresses, run a comparison report to see how the company finances are holding up against what you've budgeted.

Split Billing

The introduction of split billing will allow an invoice to be divided among multiple matters (projects). The invoice breakdown can be easily customized using percentages.

Multi-Tier Invoicing

Joint/Phased Invoices now have the option to roll up to any specified level in the project hierarchy, rather than just rolling up to the root or Client level. Combination options include roll up at Master Project, Phase, Sub phase or Client.

Automatic General Journals for accurate accounting

We now create automatic journal entries when an Invoice, Payment or Check is voided and also allow users to specify the voided date. Automatic journal entries will now also allow billing users to void Invoices, Payments and Checks that fall in previously closed periods without any risk of impacting accounting.

Time Card enhancements

We have introduced Project, Client and Activity filters to the Time Card giving users more control when they are entering time. Additionally, users now have the option to turn on billed status for their time card entries.

Other improvements:

- Budgets, Estimates and Fee Schedules> Added search function to assign projects dialog to allow for quick and easy assignment process. Also, Projects that are already assigned a budget (or estimate, fee schedule) are grayed out to avoid any assignments by mistake.
- Budgets> We have added batch update action to Budget and Estimate lists to allow users to change active status, Fee Schedule and date in one action.
- Checks>This update allows accounting users to print Checks using custom templates developed by BQE Consulting teams.
- Cloud Feeds> Accounting users can now set connected accounts as inactive. This takes away the need to disconnect certain accounts like expired credit cards and thus avoid losing matched data.
- Cloud Feeds>Users can override auto matching for feeds by using the "Find Match" option.
- Dashboard> "Project Allocation" widget now rolls up values to parent project level.
- Dashboard> Allocation widgets like Employee Allocation, Project Allocation now compute spent for all allocation scenarios including Employee Group- Activity and Employee Group-Activity Group.
- Dashboard> Shared dashboard widgets now allow users other than the owner to also apply their own filters.
- Dashboard> We now handle employee and vendor groups in "Staff Work Load" and "Employee Allocation Widget".
- Dashboard>"Project Allocation by Activity" widget was enhanced to show allocation start and end dates and also default to show allocations for the logged user only.
- Expense Entry> We now support credits for reimbursable expenses by allowing users to enter negative reimbursable expenses.
- Fee Schedule> Added the ability to search when viewing the list of existing fee schedules in "Create new Fee Schedule from existing" dialog.
- Fee Schedule> Billing users can now enable the "Minimum Hours" column in services tab.

- HR Benefits> Added the 'Earned Unit' column to benefit list view.
- HR Review Templates> The list view was further enhanced with new optional 'Status' column. Also, added status as a filter.
- HR Reviewer> We now create a To-do automatically for the reviewer as soon as the performance review is set up.
- Invoices> Automatically email Clients when sending out emails to Client contacts. This is controlled by a new setting in Global Settings>Email.
- Invoices> 'Last Emailed' now shows the time of the day along with date for last emailed.
- Invoices> Phased and Joint Invoices now show up with an expansion caret and show phases that were part of the combined invoices as separate rows when the caret is expanded.
- Invoices> Users can re-arrange the line numbers to match the current sort in Time and expense entry detail in Invoice detail view.
- Manage User and Subscriptions> Added Export to CSV action.
- Notes > Added Quick add option for Client, Employee, Project and Vendor dropdowns.
- Payments> An accounting enhancement now ensures that Core makes an automatic journal entry to adjust tax liability accounts when a Write off or Credit payment is entered.
- Payments> Core now allows users to pick a contra asset account when entering a write-off/credit payment.
- Payments> Users can now view the deposit that is holding the payment by using the 'View Deposit' row action.
- Project Structure> We now leave the hierarchy view expanded (or collapsed) when moving phases up or down or when moving them across projects.
- Project> User can now create a new client when cloning a Project.
- Reports> 'Billable Work History' report now can be run for billed as well as un-billed time and expenses.
- Reports> Budget reports now allows users to run comparison based on Time and Expense Dates.
- Reports> Employee Missing Time report now uses weekly standard hours if the standard day hours for the employee are not set.
- Security> HR Salary history now allows admin users to control if they want employee managers to view salary history of their employees.
- Security> We have added new security settings called 'Show Performance Widgets' in Project, Client, Employee and Vendor to allow an administrative control on who has access to this information.
- Security> We have added new 'Show Billing Options' security to allow admin users to control who has access to project billing information.

- Security> We have added the security profile as a filter option to make it easy for Core admin users to filter for employees that have specific security profiles assigned.
- Statements> Statement generation was simplified by limiting the date range drop-down to just 'As of' date.
- Time & Expense Reviewer> Managers can now view the actual hours of the time entry by turning on the 'Actual Hours' column in Reviewer screen.
- Time & Expense Reviewer> Users can locate entries by class by using the optional 'Class' column.

Other fixes:

- Calendar> Progressive scroll would not work for documents attached to a calendar event. This was fixed
- Checks> A scenario tied to Payee filter would cause the progressive scroll to stop working after 25 records. This was fixed.
- Checks> Class attribute specified for line items was not being automatically set for AR side even though there was no default class set at the Project level. This was fixed.
- Cloud Feeds> An issue with the third-party provider, Yodlee was preventing adding accounts when the Company owner was missing the last name. This was fixed.
- Cloud Feeds> Matching feeds to transactions in closed periods was being prevented. This was corrected.
- Cloud Feeds> When associating a new Core COA to an existing connected bank, existing feeds would stop showing in the transaction view. This was fixed.
- ePayments> ePayments related UI would appear in some instances even if ePayments is not turned on for the company. This was corrected.
- Expense Entry> Batch update to change expense entries for the expense code would not automatically update the income and expense accounts to match the accounts set at Expense code level. This was corrected.
- General> Google maps integration for address section was not working. This was fixed.
- Integration> An issue was preventing Vendor sync for QBO Australia. This was fixed.
- Integration> QBO record synced from Core would not show the correct payment type in certain scenarios. This was fixed.
- LEDES Export> Classification field was not getting abbreviated. This was fixed.
- Project Assignment >Progressive scroll would break in a certain scenario. This was fixed.

- Project Assignments> Inactive activity and expense codes would show up when searching for items in "Add assignments". This was fixed.
- Projects> Changing the class attribute and selecting change all existing records would cause discrepancies in class accounting reports. This was fixed.
- Projects> Users were able to modify existing opening balance entries that had prior payment information and this would cause a discrepancy. This was fixed.
- Projects> Users would always get navigated to the details tab when using Project hierarchical drop down to move between phases. This was corrected.
- PTO> Approving a PTO by navigating from the notification area would cause the approver to be not prompted to create a time entry. This was fixed.
- Reports> "Employee Allocation Units Summary" would fail if "Show Active Only Rule" was checked in Allocation and Forecasting. This was fixed.
- Reports> "General Ledger Cash Basis" would take a long time to process for large databases. This was fixed.
- Reports> "Project Allocation Units" report would fail to process for large data. This was fixed.
- Time and Expense entry>Cash accounting was getting affected when an expense entry was made part of an invoice with prior payments. This was fixed.
- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes.

VERSION 1.1.144 RELEASED ON JANUARY 18, 2020

What's new in this version?

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

Due Date Aging

This update adds a slick new option to base Aging reports off Invoice and Bill due dates.

New Contract Amount Calculator

We have added a contract amount calculator that allows users to express Project Contract as a "Percentage of total amount' or "Units x Cost Amount". This cool new feature will remember the provided values and allow recalculation at any stage of the project.

Improved, faster CSV Export

We re-wrote our CSV exporter to allow users to export unlimited records from any of Core's list views.

In-app Promotions

This update adds an intelligent, trigger driven in-app promotion messaging system to Core that will allow BQE to engage with our customers more by informing about the new features and upcoming BQE events.

Enhanced Xero Integration

We have added sync support for projects in Xero and Core. It does not matter where you maintain your project list. These new sync improvements have you covered.

Budget Improvements

We have added Start and end dates to budget line items to allow for easy import to Allocations and also improve Budget tracking and comparison.

Other improvements:

- ePayments> Core Users can now pass the $.30 fixed processing fee charged by Stripe for each transaction on to their Clients.
- Gantt Chart> Users now copy allocations and create new tasks from the Gantt view also.
- General> We made the column chooser scroll bar wider to make it more visible for users.
- General>Users who open multiple tabs of different Core companies at the same time are now prompted to close the other tabs before switching companies.
- Integration>Implemented the latest version of authentication protocol for Xero integration.
- Notifications> Certain system generated emails like allocation assignment were improved for content.
- Reports> 1099 Reports now allow users to specify if they want to report on 1099 vendors only.

- Reports> Added Project start and due date filters to 'Contract Analysis' report.
- Reports> All Time and Expense reports were enhanced with an 'Employee Manager' filter.
- Reports> 'Client Transactions' report was further enhanced to report accrual and cash-based revenue by Client or Project state.
- Reports>Added 'Payment Date' filter to 'Taxes' report.
- Reports>AR Payments of type 'Write-off' were not being reflected in Cash basis reports. This was corrected.
- Security> Admin users can now filter the list for active employees and vendors.
- Subscriptions>Admin users can now purchase 4- and 5-year subscription plans right from the Manage Subscriptions page.
- Time & Expense Reviewer> Added the 'Paid' filter to this view.

Other fixes:

- Allocations>Users were unable to copy allocations when the logged user had employee control restrictions on allocation screen. This was fixed.
- Calendar>Creating an event for 'Submittal' review date would cause the event to be a day off. This was fixed.
- Chart of Accounts> Users were not able to an account when 'As of' date was set blank. This was fixed.
- Checks>Users were able to create a recurring check without a payee. This was corrected.
- Deposit Screen>Account drop down did not accept certain uppercase characters. This was fixed.
- Employee & Vendor>Masked fields like SSN, birth dates would show up complete value when the page was still loading. This was fixed.
- General> Users are now warned before navigating them to the detail view if they have selected more than one item(s).
- General>Some new screens were found to have issues with progressive scrolling. This was fixed.
- Integration>Credit and Write off payments would to sync over to QBO on Australia and Canada region companies when tax code setting was turned on. This was fixed.
- Invoices> Changing invoice date and memo for a paid invoice would cause the cash-based accounting to be thrown off. This was fixed.

- Invoices> Users were not able to process late fee invoices for a Joint Invoice which had one of the projects with zero-dollar invoices. This was fixed.
- Payments> A certain scenario could cause the 'Save' buttons to stay enabled even when a payment was being applied causing some users to record duplicate payments. This was corrected.
- Projects> When creating a new project structure from a template, the project name was being pre-filled from the name of the template and not the underlying parent project. This was corrected.
- Projects>Quick add Project was missing from Projects>Billing Contract drop-down. It was added.
- Reports> Allocation reports would refer to the descriptions of item codes instead of the descriptions provided in the allocation entry. This was fixed.
- Reports>Allocated Hours report did not match Allocation and Forecasting Screen when allocation involved groups. This was fixed.
- Reports>'Project Profitability' report would exclude invoices for main type projects. This was fixed.
- Security> Users with no access to client list would see the client list when hitting create new project in project drop-down. This was corrected.
- Time & Expense Reviewer> Recently added column 'Manager' was renamed 'Project Manager' to avoid confusion.
- Time Entry> Entries marked as non-billable by the system if they were over the contract amount would change to billable if the user changed the activity. This was corrected.
- Vendor Credits>Class inheritance would fail when selecting a project with assigned class at item level. This was fixed.
- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes.

VERSION 1.1.143 RELEASED ON DECEMBER 21, 2019

What's new in this version?

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

Smart Timers

New and improved Timers list, auto populated with the most recently used Project and Activity combinations, will now allow users to start timers with minimal effort and no input. A brand-new user preference allows users to limit the number of predicted entries to suit their typical use.

Column re-sizing across the board

We have re-engineered the column re-sizing experience and made it available for all columns throughout the app. Users also have the option to reset column widths to their default values.

Project assignments made easier

A brand new 'Assignments' tab in Project view will allow users to perform all assignments-rules, contacts, team members, activity and expense codes from one convenient location.

Allocation Status in Time Card

This update adds the much-requested feature of allocation status in the Time Card and Time Entry screens. The system will now highlight allocation status information, if an underlying allocation is detected, when entering time and help users to stay within the allocated units.

Improved, efficient Gantt Charts

Users can now shift entire project time lines by using the new drag and drop feature for Projects and resources. Moving the top-level project or any underlying phases automatically adjusts the start and end dates for all underlying tasks. Other neat usability improvements include magnifying small interval tasks on mouse hover to for easy linking and drag & drop.

Copy allocations

Allocating employees and Projects just got easier with the new copy and paste special feature in Allocations. Existing allocations can be copied as is or modified for multiple attributes including Employee, Project, Start and End Dates, dependences and notification settings.

Improved search techniques for dropdowns and Core Lists

A simplified search algorithm now returns results based on pattern matching without the need of any explicit wild card specifiers. Also, text filter search in Core lists now applies the search term to all visible columns of the list, making search-based filtering more efficient and intuitive.

Other improvements:

- Allocation & Forecasting> Added a toggle to allow users to show tasks for active projects or all projects in the task view.
- Allocation & Forecasting> Users can now filter forecasting views using Project custom fields.
- Cloud Feeds> This update adds an inbuilt mechanism to detect duplicate feeds from third-party feeds sources and automatically mark them as ignored.
- Allocation & Forecasting> Employee and approving managers are now notified that the PTO request is in conflict with an already scheduled project allocation, if the employee has been scheduled for a task in the same period.
- Collections> Users can now choose to turn on the 'ePayment' column to visually know if any of the open invoices are enabled for online payment.
- Contacts> Users can view a contact's mobile phone number from the list view.
- Dashboard> To-Do widget now automatically shows the items which are due sooner on the top.
- Documents> Users can now navigate to the underlying entry the document is attached by clicking the 'View associated entry' row action.
- Estimates> Users can now generate the 'Estimate Details' report for a specific client.
- Gantt Chart> Users will be able to move smaller interval tasks much easily as the system magnifies the task to ease drag/drop and linking actions.
- General> Quick add function has been enhanced to also include lists like 'Classes', 'Cost Pools' and 'Payment Terms'
- General>Success notifications were made to fade away quicker than earlier.
- Integration> Joint Invoices are now sent over as a single, unified invoice for the Customer when syncing Core invoices to Xero.
- Integration> QuickBooks Online integration now supports project currency. Customers that have been designated a custom currency in QuickBooks will have their project currency in Core mapped to the currency preference in QuickBooks. The setting automatically flows to their invoice templates.
- Invoices> Invoices that are automatically created to record client charges for bounced checks will be appended with '-BC' specifier for easy identification and management.
- Items> 'Code' field now allows users to enter up to 100 characters.
- Project Templates> Users can now edit Project template name and description from the detail view.
- Projects> Admin users can now set up project rules that control if non-billable time and expense entries should show up on invoices. This was previously available only as global setting but users can now selectively turn this setting on or off by Project.
- Reports> Added important Project filters to 'Percentage Billed' report.

- Reports> All budget reports were enhanced with important project filters like Project Status, Contract Type, Group, Manager etc.
- Reports> AP Aging reports now offer Vendor group as a filter.
- Reports> Choosing the 'All Dates' filter would un-necessarily restrict the reports for dates for a certain date range. This restriction was removed.
- Reports> 'Collection Details' report was enhanced to show average delay information for the Client.
- Reports> GL reports would not display the credit card refund entries correctly. This was fixed.
- Reports> Project reports that allow custom groups will now also include an option to group by Project Principal or Originator.
- Reports> Tax Registry report now allows users to filter for payment dates.
- Reports> 'To-Do Tasks' report can now be filtered Type, Project, Client, Employee and Vendor.
- Reports>'AR Aging with Credit Payments' now allows users to select the 'Show General Journal' option without being forced to select 'show invoices' option.
- Reports>Project time and expense reports now have an option to include or exclude WUD while calculating the charge amount.
- Reviewer> Added 'Project Manager' as an optional column.
- Reviewer> Users can now check the paid status of time and expense entries in the 'Reviewer' by choosing to turn on the 'Paid' column.
- Security> Admin users can now control which users have access to sensitive employee information like SSN and Birthdates.
- Time & Expense>Users can now indicate if they want to re-calculate Markup/ WUD when assigning un-billed time and expense entries to existing invoices from the batch update utility in Time Entries, Expense Entries and Reviewer.
- Time Card> Added column chooser in the 'Day view'.
- Timers> The enhanced list view for Timers can now be sorted by current recorded time.
- Timers> Users can optionally turn on the 'Start' and 'Stop' times columns.
- To-Do> Users can now choose which employee completed the To-Do. This works great for To-Dos' assigned to a group of employees.
- Vendor Credits> Vendor Credits now support 'Class' at the line item level. The system will pre-fill the default vendor class automatically.
- Vendors> Accounting users can update multiple vendors for '1099' attribute using batch update.

Other fixes:

- Account Reconciliation>Users would not receive a prompt advising users of the effects of clicking the Undo All button. This was fixed.
- Allocation & Forecasting> Users were experiencing a delay while saving an allocation record when there were significant number of allocations for the selected resource or project. This was corrected.
- Budget>Outside Consultant vendor type records are missing from the Created By drop-down when creating a new budget. This was corrected.
- Chart of Accounts>Users were not able to delete or merge 'Payroll Expenses - 6560' non-system expense account. This was corrected.
- Checks>Expense entries created in checks would not get imported again if you delete the check but keep the expense entries. This was corrected.
- Client>Performance project dropdown were not displaying correct project structure order in certain scenarios. This was corrected.
- Cloud Feeds> Users were not able to change the payee for a split transaction rule that used both item as well as accounts. This was corrected.
- Cloud Feeds>Split transactions would not save as an expense entry to a project that had "memo required for expense entry" enabled even if memo was added. This was corrected.
- Create Batch Invoice> Net Bill Amount was not getting calculated correctly if the user updated percent complete for 'Recurring Plus Hourly' contract type projects. This was fixed.
- Dashboard> The 'Money Owed' widget would incorrectly clubbed multiple clients when an aging filter was applied. This was fixed.
- Dashboard>Cash Flow widget would display incorrect cash amounts for payments on joint invoices. This was corrected.
- Dashboard>Project Gross Margin would not display correct data when using 'This Month' Invoice Date filter. This was fixed.
- Employee> Export to CSV would only export the first 25 records. This was corrected.
- Estimates>Users could assign completed, cancelled and hold projects in the Estimate list view. This was corrected.
- Expense Entries > For some users, the view by option would always show 'Employee' even they had previously changed it to 'Vendor' and selected a vendor from the given list. This was fixed.
- Expense Entries>A billable expense would not change to non-billable when updating the project value to an overhead or marketing project type. This was corrected.
- Expense Entries>Expense entry class values were not copied over when setting the class value in Cloud Feeds, Vendor Bill, Check or Credit Card transactions. This was corrected.
- General>URL fields would not accept values without the 'www' specifier. This was corrected.

- Invoices and Payments>Search was reported not working when applying the Void Invoices or Void Payments filter. This was corrected.
- Invoices> The system would allow reuse of voided invoice numbers. This was corrected.
- Invoices>In certain billing scenarios, the Phased Invoice and Phased Invoice by Expense did not display expense detail for all projects on a combined invoice. This was fixed.
- LEDES>The 'LINE_ITEM_TAX_TOTAL' was displaying the line item total instead of the total taxes applied to the item. This was corrected.
- Manage Subscriptions> Quick Search was working in Assign Subscription Dialog. This was fixed.
- MYOB Integration>Core vendor bills using the Account tab would not sync to MYOB AccountRight. This was corrected.
- MYOB Integration>MYOB Mapping module had certain sorting issues when mapping unmapped MYOB records. This was corrected.
- Payments>In certain scenarios, users were not able post or edit a payment entry. This was corrected.
- Print Checks>Hyphen in the Zip Code field was not included when printing checks. This was corrected.
- Project Template>The Duplicate row action option was reported not duplicating the project template correctly. This was corrected.
- Project>Adding or updating the project Class value and choosing to update existing time and expense entries, would not update the Class value on existing expense entries or invoices. This was corrected.
- Purchase Order> Purchase Order received and selected while creating a Vendor Bill would not reflect the correct value until the bill was saved. This was corrected.
- Purchase Order>Using Quick Add to add a new client would not populate the new record in the Client field. This was corrected.
- Quick Add>Core would automatically change a Client record from a Company type to an Individual type when quick adding a Client. This was corrected.
- QuickBooks Integration>Core Client Record currency value would not be recorded when getting a Client record having Payment Currency set in QuickBooks. This was corrected.
- Recurring Invoice> The system would fail to warn users if an invoice number of an invalid length was entered. This was corrected.
- Recurring Invoice> Users on non-US time zones would face an issue with the invoice date for the automatic invoice being ahead by a day. This was fixed.
- Reports>Employee Utilization report did not match Employee>Performance>Utilization widget in certain scenarios. This was corrected.
- Reports>Profit and Loss by Class Cash Basis had an issue for negative credit card transactions. This was corrected.

- Reports>Balance Sheet Accrual by Project report would not obey the project filter and display all projects. This was corrected.
- Reports>'Budget Comparison by Employee' and 'Estimate Comparison' report would throw an error when 'Client Group' filter was applied. This was fixed.
- Reports>Invoice detail where appearing as negative amounts when using drilling down feature in Profit & Loss reports. This was corrected.
- Reports>Several Budget reports would not filter data when filtering by any Budget custom field. This was corrected.
- Security>Project contract amount would show up in the split panel even when the user did not have security to view it. This was corrected.
- Time and Expense Reviewer>Users could still see the cost amount grand total when their security profile had Time Entry>Show cost rate disabled. This was corrected.
- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes.

VERSION 1.1.142 RELEASED ON NOVEMBER 16, 2019

What's new in this version?

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

Drill down for Financial reports

All Core financial reports like Balance Sheet, P&L, General Ledger and Trial Balance now support deep level drill down to the underlying transactions. This much awaited feature not only saves accounting users countless hours in getting to the root of any discrepancies but also gives them an easy way to edit transactions right from the report.

Improved Account reconciliations

We made several enhancements to the Account reconciliation process including ajax driven auto save, more forgiving integrity checks that guarantee no reconciliation progress is lost even when conflicts are detected by the system. These changes make the reconciliation

process simpler and more intuitive and ensure accounting users never have to redo a reconciliation session even if they forgot to save their progress or any of the entries were modified or deleted by other users while reconciliation was being performed.

Enhanced ePayments

Users can now send out retainer invoices with 'Pay Now' online payment options. Also, we added online payment options at the Client and Project level to allow users to control which of their Clients or Projects can have invoices with ePayment enabled.

Automatic Allocations for approved PTO

The system can now create automatic allocations when an employee PTO is approved to avoid scheduling issues. Admin users can now set up their company to take advantage of this feature by turning on a new global setting and keep scheduling teams always aware of upcoming PTOs'.

To-Do group assignment

This update adds a much-requested feature that allows assignment of To-dos' to employee or vendor groups. The assigned To Do will appear on To-do lists of all group members and allow them to record progress on the To Do as well as mark it as completed.

New and Improved Widgets

We have added two new dashboard widgets- 'Project Allocation' and 'Project Allocation by Activity'. We have also improved our 'Money Owed widget' with a new Aging Days filter. Also, users can now click on the 'Client' column to navigate them to a filtered view of the Invoice Collections screen.

Other improvements:

- Allocation & Forecasting> Added 'Project Groups' and 'Contract Type' as filters for the Forecasting views.
- Budgets & Estimates> Users can now assign a Project when creating a new budget or estimate.

- Client> Performance screen now rolls up all widgets to reflect cumulative values when the selected project is a main project.
- Dashboard> Added more 'As of' date filter options.
- Dashboard> Filter options for a widget now sorted by name.
- Gantt Chart> Users can now batch update multiple allocations by using the 'Select all' checkbox.
- General> Added 'Quick Add' function for account dropdown all over the app.
- General> Added the 'Attachment' column for Client, Project, Employee and Vendor lists.
- General> We made it very easy to enter dates manually using keyboard. The system not only prefills that date format but predicts the date if the user entered a partial date.
- HR Benefits> HR admin users can now batch assign benefit profiles to multiple employees at the same time.
- Invoice Templates> Added 'Employee and Description' option to allow users to display time and expense entries grouped by employee and then by time entry description.
- Invoice Templates> Phased Invoices template was enhanced to automatically show extra expenses and services as separate sections.
- Notifications & Reminders> Notification panel was redesigned to allow for better separation of system generated notifications and reminders.
- Payments> We now allow users to add payments by invoice number, client or project. A new Payment dialog presents all three options for the user.
- Reports> 'Balance Sheet' reports now allow summarized as a report preview option. This option summarizes accounts by Asset, Liability or Equity sections.
- Reports> Full access users can now delete schedule reports that were created by users who no longer have access to the application.
- Reports>Project reports can now be filtered by Project Principal and Originator.
- Reports>The 'Employee Paid Time Off Comparison' report now has a Balance column to let administrators know how much PTO is available for each employee.
- Reports>The Statement by Client (Accountant) template has received several corrections to enhance its usability.
- Reviewer>Added 'Type' column to the item filter to help identify the type.
- Time Card> The memo box received several usability fixes including auto focus on keyboard shortcut, a new memo icon and re-organized memo box.
- Time Entries> The 'Time Verification' report now groups by Project or employee depending upon the view by option for the screen. Also, the same report allows to show or hide the signature section when launched from the reports area.
- To-Do> Users can now clone an existing To-do and be able to change any attribute before saving it as a new To-Do.

- HR Reviews> Security admin users can now control if the HR Users can only see reviews that are assigned to them.
- Reports> 'Workflow' report can now be filtered by employee.
- Workflow>Users will now be able to see the name of the employee the entry was submitted to in the detail view of the entry.

Other fixes:

- Auto Complete> The system was not able to differentiate shortcuts that spelt the same but used different cases. This was corrected.
- Budgets & Estimates>End users could not make budgets and estimates inactive when the create date had a date prior to the Company>Closing Date. This was corrected.
- Budgets>Quick Add functionality was missing from the Resource drop-down. This was corrected.
- Client>Users could not delete a client contact assigned to deleted project. This was corrected.
- Credit Memo> This screen did not have the 'Amount' column as the last column in the list view. This was corrected.
- Custom Fields> Some users could not use their custom fields as screen filters in certain scenarios. This was corrected.
- Dashboard>In certain scenarios, the Utilization percentage found in the Staff Utilization Widget was not matching the Utilization percentage found in the Employee Performance screen. This was fixed.
- General Journal>Row level action 'Reverse' to reverse a journal entry was labeled as Void. This was corrected.
- General> Vendor Quick Add functionality was missing from the Checks, Credit Card and General Journal screens. This was corrected.
- Integration>Core invoice with pre-tax discount did not sync to QBO with correct amount. This was fixed.
- Invoice Templates>Extra expense entries were being included in the 'Previously Billed' column on phased invoice templates. This was corrected.
- Manage Users> Admin users were not able to add a Core user who had an apostrophe in their email address. This was fixed.
- Manual Invoice> This screen was missing the 'Save and Add Another' feature. This was corrected.
- Project>Project Rule 'Memo is required for time entry' was not allowing the update of time details in the Create Batch Invoice screen. This was fixed.

- Project>Project structures created from a project template would be duplicated and/or display incorrect structure order when searching for these projects. This was fixed.
- Project>Users were unable to change project manager on a project, if their assigned security profile has the Project>Show Contract Amount option unchecked. This was corrected.
- Purchase Order> The project column in the PO list was getting truncated. This was fixed.
- Reconciliations>Draft reconciliations would show up in the Manage reconciliation list. This was corrected.
- Reminders>Reminder notification for past due vendor bill was not ignoring zero amount bills. This was fixed.
- Reports>In certain instances, recurring bill transactions would not show up on the Profit and Loss Cash Basis report. This was corrected.
- Reports>In certain instances, recurring bill transactions would not show up on the Transaction Details Cash Basis report. This was corrected.
- Reports>In certain scenarios extra expenses were being included in contract amount in the 'Work in Progress Details' report. This was fixed.
- Reports>In certain scenarios the 'Statement by Accountant', the client balance amount would not match the same amount found in the Invoice screen and Aging reports. This was fixed.
- Reports>Negative invoices were not shown in all statements reports. This was fixed.
- Statements>The Statement by Client report would page break by Project and reset Client totals. This was fixed.
- Time Entries>Incorrect Invoice Dates were being displayed in Time Entries>Batch Update>Invoices compared to dates found in Project>Transactions screen. This was fixed.
- Vendor Bills> Users could not create vendor bills from imported time entries if the time entries had dates prior to Company>Closing Date. This was corrected.
- Workflow>Pure vendors would show up in 'Submit to' drop down. This was corrected.
- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes.

VERSION 1.1.141 RELEASED ON OCTOBER 12, 2019

What's new in this version?

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

Quick Add New: Users can now create new Clients, Projects, Employees, Vendors, Activity and Expense codes, Budgets and Estimates by using the create new action conveniently placed on dropdowns.

Column resizing: This update adds a highly requested feature allowing users to resize columns like Project, Client, Description etc. We have added it to a select list of screens including Time and Expense entry, Reviewer, Project, Invoices, Payment among others.

Improved record editing: We have extended our implicit saving technique to Time entry, Expense entry, Activity items and Expense Items screens allowing users to modify records without requiring a page refresh.

Power to the Vendor: Core Vendors now have a default Expense account and Class. Also, a new 'Track payments for 1099' attribute allows admin users to flag vendors that need 1099 forms.

Improved Notifications: We have made several improvements to Core's notification system. These include consolidated notifications, refined notification messages, include date and time of the notification and the time since. These improvements were also extended to our mobile push notifications.

Default Home screen: Users can now set up their own start up screen. User can choose from options like Dashboard, a specific Core screen or the last visited screen as their preference and Core will automatically open their selected screen when logging into Core.

Reusable Vendor Bills: Accounts Payable users can now copy existing Vendors Bills along with the items and accounts. This huge time saver also allows them to tweak the new bill before saving it.

Batch Invoice improvements: Batch Invoice list view was reworked to allow users to discover the 'Time & Expense details' action more easily and the details pop-up dialog now has full-screen capability.

Configurable dropdowns: Users can now configure filter and other types of drop-downs for preferences like including in-active items, including vendors, including completed, cancelled or other projects etc. We have added separate settings for the most common drop downs, and these can be turned on or off anytime.

Automatic Project Notes: A brand new global setting allows admin users to choose one or more project attributes that can be tracked by the system to create automatic project notes. Project notes are created when any of the tracked attributes of a project are changed.

Xero Time Entry Sync: Integration users who rely on Xero payroll can now sync Time entries with their Xero company file. A huge feature for some of our Australian users.

Support for LEDES 1998BI V2 format: This legal industry only feature is meant to add support to the 1998BI V2 export format for invoices. This new format keeps all of the same information as 1998B and adds additional fields for international billing and handling taxes.

New and improved Widgets: We have made significant improvements to our Dashboard widgets including a brand new 'Project Gross Margin' widget, spent amount for Employee-Activity group allocations in Allocation widgets and updated the 'Paid time off and Comp time widget' to make it work off HR benefit usage among other improvements.

Save and Add Another: We extended this feature to all Core screens. This update added it to Vendor Bills, Purchase Order and Payments.

Custom fields for Budgets and Estimates: Users can now define custom fields for their Budgets and Estimates.

Retainer Reconciliation: This brand-new report lists all retainer requests, retainers received, and retainers used and groups this information by Client. The perfect tool to reconcile your retainers.

Other enhancements:

- Allocation & Forecasting> Forecasting view now computes used value for allocations that are based on Employee and Activity group combinations.
- Budgets and Estimates> Users can now search for Budgets and Estimates that have been assigned to projects, clients or not assigned at all.
- Calendar> Calendar event invites can now be sent to Employee Groups.

- Dashboard> 'Paid Time off and Comp Hours' widget can now report off HR module data as well.
- Dashboard> Allocation widgets now compute the used portion for allocations that are based on Employee and Activity group combination.
- Dashboard> 'Employee Allocation' widget now offers a custom date filter.
- Dashboard> Added Project Manager filter to 'Cash Flow' widget.
- Dashboard> 'Project Status' widget now shows grand totals for all projects shown in the widget.
- Documents> Users can now attach documents to Deposits and Journal entries.
- ePayment> This feature was enhanced to allow users to control automatic association of online payment accounts to new invoices.
- Fee Schedules> Users can now also search for Fee Schedules that have not been assigned yet.
- Filters> Added new date shortcut filters (Bi-Weekly, Semi-Monthly and Last 2 Weeks)
- Gantt Charts> Users can export Gantt Charts to PDF and Excel formats.
- General> All Accounting screens will now default 'Amount' to be the last column.
- General> Project dropdowns and other lists that show Projects in hierarchical manner can now be sorted by other columns also.
- Invoice Templates> Hourly Invoice by Employee now shows the details of the Time and Expense and shows subtotals by each employee.
- Invoice Templates> Vendors can now be displayed by name or company. This is controlled by a setting in Invoice templates.
- Invoices> Added the ability to filter by Class.
- Notes> Notes view now includes an indicator for attachment count.
- Notifications> Users will now get notified when an RFI or Submittal has been assigned to them.
- Project> Project description field can now accommodate up to 100 characters.
- Registers> Account Registers screen has been enhanced so the summary row remains fixed.
- Reports> All Employee reports can now be filtered and grouped by Department, Manager and Groups.
- Reports> Time entry reports can now be filtered by the recently added 'Paid' field.
- Reports> Added Project Manager filter to 'Cash Flow Monthly Statement'.
- Reports> Added Project Manager filter to 'Cash Receipts'.
- Reports> All Employee reports now offer an employee status filter.
- Reports> Employee Status filter now available for all Employee reports.
- Reports> Time Details, Time Verification and Time and Expenses reports can now be filtered by Paid status
- Reports> View your running totals on a Daily/Weekly/Monthly & Yearly basis in the Cash Receipt report
- Security> Employee Security list view can now be filtered by Employee, Employee groups, title and departments.

- Security> We added two new system defined profiles for HR administrator and HR User. These profiles focus on the HR functions only.
- Time and Expense Reviewer> Added 'Classification' as an optional column.
- Time and Expense Reviewer> Users are now prompted with more options when issuing an 'Update Rates' batch change.
- Time and Expense> Users can now have an option to update classifications as well when issuing a bulk update for rates.
- Timers> Timers have been enhanced to help differentiate between active and other timers.
- Workflow> Added new global rule that requires approvers to enter a note when rejecting entries.

Other fixes:

- Batch update>Activity Items and Expense Items> The batch update function would not respect the 'allow access to bill and cost rates' security. This was fixed.
- Expense Entries> Core allowed paid reimbursable to be marked as non-reimbursable using the batch update tool. This is now fixed.
- Billing Schedules> Invoices processed from 'Billing Schedules' would not correctly interpret the 'Billing amount includes extra time and expense' option and markdown expenses to zero. This was fixed.
- Create Batch Invoice> Disabling 'Allow Batch Change' security would not allow a biller to exclude expense entries when billing. This was corrected.
- Dashboard and Task Allocation and Forecasting> 'Staff Workload' and 'Employee Allocation' widgets fail to bring in 'Used' hours if the allocation includes activity group and the time was recorded to one of the activities of the group. This was fixed.
- ePayment> Users could not add documents to payments made via ePayment feature. This is now fixed.
- Expense Entries> Using Paste Special in certain entry scenarios would create entries with a blank cost rate. This was corrected.
- Gantt Chart and Task Allocation and Forecasting>Using Batch Update> Pushed Tasks By Days option on the predecessor task of two linked tasks would not push the following task as well. This is now fixed.
- Integrations> QuickBooks GET customers operation would fail in certain scenarios. This was fixed.
- Invoice Templates> Certain combined invoice scenarios would not show expense line items on a Phased Invoice. This was fixed.
- Invoices Templates> In certain scenarios, adjusting net bill amount displayed wrong service amounts on a Phased Invoice. This is now fixed.
- Invoices Templates> The 'Current Services' amount would be zero when changing the net bill amount for certain Phased Invoices. This was fixed.

- Invoices>Invoice Emailing> Certain scenarios would cause errors when emailing invoices to clients.
- Statements> Core would use the same client name to the statement file name when sending multiple client statements without preview. This was corrected.
- Manage Subscriptions> Adding a new credit card payment method would set this as your default payment method when no payment method has been set. This was corrected.
- Manual Invoice> Updating an Activity Code on an existing 'Draft Manual' Invoice would blank the amount when reprocessing as Draft or Final. This was corrected.
- Print Checks> Blank check issue when previewing checks was reported by some of our Chrome browser users. This was corrected.
- Project Template> Creating a Project from a Project Template would not inherit the Fee Schedule set at the Client> Billing Options screen. This is now fixed.
- Project>Performance> The Contract Analysis widget was displaying double amount in the limit column when previewing at the root/parent project level. This was corrected.
- Reports> Memorizing reports with set filters would duplicate these filters for these reports in all Report tabs.
- Report Templates> Allocated Hours report was not reporting hours in the consumed hours column for allocations done using employee groups. This is now fixed.
- Report Templates> There were certain scenarios where Profit & Loss Cash Basis and Profit & Loss Cash Basis By Class reports were not providing correct amounts. This was corrected.
- Report Templates> Time Verification report was not displaying the correct Project Display As value set in Global Settings>User Interface. This was corrected.
- Report Templates> Work in Progress Details report date column sort was not working. This is now fixed.
- Statements>Batch Email> Message on Statement' does not get displayed on report if you email it without preview. This is now fixed.
- Time and Expense Reviewer> The on-screen Time and Expense Details would not use the set Employee filter when displaying results. This was corrected.
- Time Card>Day View> There were certain scenarios where Core would display a memo for a time entry when none was present. This was corrected.
- Time Entries and Expense Entries>Paste Special> When using Paste Special to paste entries to an employee group, Core would not paste to all in the group if the group had inactive employee group members. This was fixed.
- Time Entries> Batch Update and Invoices> Incorrect WUD calculations after adding time entries to invoices in several batch updates. This was fixed.
- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes.

What's new in this version?

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

Introducing Core ePayments

Core has partnered with leading online payment platform, Stripe to offer users the ability to accept online payments using Credit cards. In the first version of ePayments, Core users will be able embed "Pay Now" links to invoices and emails that are sent to Clients. Clients will have the option to pay using Credit and Debit cards by clicking the "Pay Now" button. Core users also get to choose which of their invoices can be paid using ePayments and can also set up multiple online payment accounts to control surcharges and other settings. Invoices paid using ePayments are instantly recorded and reconciled as Payment and Deposits in Core.

Send Core Expenses to QuickBooks

QuickBooks Online users can now send employee expenses from Core to QuickBooks as bills. An intuitive, one-time mapping UI allows users to map Core employees to QBO vendors.

Filter reports by Custom fields

A much-awaited feature that will allow users to apply custom fields as filters to reports has been added in this update. Custom fields that have been set up for any Core module will automatically appear as filter options for relevant reports. e.g. Project custom fields will appear for Aging and other billing reports.

Faster, leaner Bill Payments

We have now made it easier to review a vendor bill or a batch of vendor bills and process bill payments right from the Vendor Bill screen. This effective change allows you to drastically reduce your bill payment process to just a few clicks.

Standalone budgets and estimates

Core now creates a copy of the budget or estimate when cloning a project from an existing project with a budget or estimate assigned to it. The new budget or estimate is automatically assigned to the new project and is given the same name as that of the project.

Date your budgets and estimates

Users can now track, filter and search their budgets and estimates by date. A brand-new attribute in the budget and estimate screen allows user to define a date for the budget.

Project templates with phase level editing

Drastically reduce the time it takes to create and update your project setups using Project Templates. Core now allows you update project options of all your phases found in your project templates.

Send multiple Statements Instantly

A new "Show Preview" option in Statement screen allows users to send multiple statements without the hassle of previewing and sending each email separately.

Paid flag for Time entries

Users now have ability to mark time entries as paid for AP purposes. This option that was already available for expense entries and allows users to exclude entries from appearing as payables in the Bill Payment screen. Users can also specify the date when the entry was paid.

Batch actions for Time Card

Time Card users now have more control over the entries that are suggested by the system based on previous usage. The new batch action menu allows users to remove suggestions and also submit time entries for approval.

Cross linking in Projects

Users can navigate to other screens right from the detail view of the project by just clicking the label next to the assigned entity.

Quick Date filters

We have modified our screen date filters to allow users to quickly switch between the various date ranges.

Other improvements:

Accounting>Core users can now specify separate default "Discount" accounts for AR and AP accounting.

Allocation and Forecasting>Forecasting screen can now be filtered by Project Manager.

Batch Invoicing>Projects with rule "Always show in batch invoice" will now also be evaluated for active status before being auto populated in the batch invoice screen. Projects with status other than "active" would be not considered for billing even if they have the "Always show in batch invoice" rule applied.

Batch Invoicing>Billers now are notified when the system detects un-approved time and expense entries for projects that are being billed. This is done via in-line notification that also provides an option to preview the "un-approved time and expenses report".

Bill Payment>"Credits Available" column now shows up by default when entering bill payments for vendors.

Budget and Estimate>Users can now see line item cost amounts and their respective grand totals in the Budget and Estimate screens.

Clients>Core now requires users to enter a company if the Client is being marked of type "Company". Similarly, when a Client is marked as "Individual", Core will require the user to enter name for the Client.

Cloud Feeds>Added quick search capabilities to our Cloud Feeds screen.

Collections>Several improvements were done to enhance the user experience including adding a search feature, new batch actions and columns like Invoice terms etc.

Currency>Hong Kong Currency now available in Core

Dashboard> Dashboard widgets that support date filters now get the all date range shortcuts as filter options.

Dashboard>Added the ability to filter for inactive projects in the Due Projects widget.

Dashboard>The To-Do Widget can now be filtered by Client, Employee, Invoices, Project and Vendor To-Do Types.

Drop Down Lists>Core now saves sort preference on all our dropdown lists.

Filters>Core will now show all selected items in filters at the top of the drop-down list. This has been added to lists and will be added to report filters soon.

General>Core now has a Save and Add new button for all Core "Create New" screens to facilitate faster data entry.

Global Settings>Email Settings>Users now have ability to use Client first name and the last name as smart fields.

HR Performance Review>You can now email performance reviews directly from the Performance Review screen.

Manual Invoice>Core users now have "Draft & Preview" and "Final & Preview" options to preview their draft or final manual invoice.

Payments>Users can now email payment receipts to Clients right from the payment list.

Projects>Core will now group all Joint and Phased invoices by Invoice number when in the parent project's Detail>Transaction Tab and its project type is set to Main.

Project Structure>Adding a new phase now inherits Billing Options, Account and Class assignments from its parent project.

Project Structure>Column Headings are now locked as you scroll down your project structure list.

Project Structure>We have included a batch action menu to allow users to merge existing phases or delete any phases.

Project>Added new "Settlement Calculator" feature that will allow users to recalculate project contract amounts on "percentage of contract" projects and recalculate percentage of total project and contract amounts for all phases of the entire project.

Projects> Project clone feature now adjusts allocation start and end dates according to the new project start date.

Projects>Users can now indicate if they want to see the Project list view expanded to reveal the hierarchical phases or as collapsed. The preference is available under the "More" menu in Project list and is remembered for the logged user.

Projects>Users can now see the "Fee Schedule" associated to the project in the project list view.

Projects>Users can now see the Purchase Order Number (PO#) in the project list view.

Purchase Order>Users now have the ability of specifying vendor as address option.

Reports>Core Users can now filter all vendor related screens and reports by Vendor, Contract Employee and Outside Consultant vendor type.

Time & Expense Reviewer>Added "Extra" as an optional column in this screen.

Time and Expense Reviewer> Added "Cost" as an optional column in this screen. This column also includes a grand total.

Time Card> Added the "Extra" check box in the memo box. Also, memo field now allows formatted memos to be entered.

Time Card>Added an option to show the "Client" associated with selected Project.

Time and Expense entry>Added an option to show the "Client" associated with selected Project. Users can also now filter by Client.

Time Card>Added keyboard shortcut (CTRL+M) to open the memo box in the Time Card screen.

Time Entries> Core now prompts users when certain time entries are locked for client invoicing and provides the name of the biller locking these time entries.

Time Entry, Expense Entry and Reviewer>Core can now filter time and expense entries by Employee Manager

Time Entry>Users can now Batch Update income/expense account assignment for all unbilled time entries.

To-Do> Core users can now streamline their To-Do search by filtering the To-dos by the Created By field.

To-Do> Users can now see the status of their To-dos in the list view.

To-Do>We streamlined the process of cloning To-dos by allowing to change the To-Do ID and type.

To-dos> Core will now automatically update the Percent complete field to 100% when a To-Do is marked completed.

Vendor Bills> Add the "Attachment" column to indicate if there are attachments and the number of attachments tied to the vendor bill.

Vendor Bills> Add the "Paid" and "Balance" to indicate the paid status of vendor bills.

Other fixes:

Accounting>Checks with expense items assigned to an expense account where being displayed under the default income account when running the "General Ledger" and "General Ledger Extended" reports. This was fixed.

Allocation & Forecasting>Forecasting columns we reported to be no longer visible when scrolling down to the next page of allocations. This was fixed.

Allocation & Forecasting>Using the Batch Update>" Delay and Push Task by Days" options would not update allocation start and end dates. This was fixed.

Bill Payment>When trying to pay a Vendor Bill with both a credit and payment that added up to the sum of the Vendor Bill, the system in-correctly prompts about the payment being greater than the bill amount. This was fixed.

Bill Payments and Expense Log>Partially paid employee reimbursable expenses would cause discrepancies on which expense entries were paid and which were not. This was fixed.

Billing>Core would use the wrong email address in the "To" and "Cc" fields when emailing invoice to the Client and to the project billing contact in certain scenarios. This was fixed.

Dashboard>Widgets> Users with "Full Access" security with "Account Receivable' module view disabled were not able to see the income portion of 'Income vs Expense' Widget. This was fixed.

Documents>Core users reported that they could not download .msg files. This was fixed.

Expense Entries>It was reported that the on-screen Employee Expense Report would double the Grand Total amount. This was fixed.

Expense Entries>There was an issue with viewing expense entry attachments using the Microsoft Edge browser. This was fixed.

Expense Entries>Updating an expense entry from non-billable to billable on a project having the "Include billable expenses in contract amount" project rule enabled would mark the expense as Extra and not part of the contract.

Expense Entry> Batch update of the reimbursable flag was not creating the necessary behind the scene accounting entries. This was corrected.

Expense Entry>Fixed inconsistent Copy behavior when using Select All and mouse scroll wheel.

Human Resources>Updating an Employee Performance review would cause the Score to be updated with an incorrect value. This was fixed.

Invoices>Extra expenses were being included in the recurring amount in a Recurring + Hourly contract type. This was fixed.

Invoices>Joint invoices that had project/phases with more than one project manager would not show in the Invoices list when filtering by only one of the project managers. This was fixed.

Invoices>Users reported issues choosing a different invoice template in the Invoices screen when using their iPad tablet. This was fixed.

Progressive scroll>Our automatic selecting of next page records when choosing the "Select All" option and using the mouse scroll button would not allow users to unselect records. This was fixed.

Project Assignments>Copy Assignments>Performing a wild card search in this screen would display unrelated search results when scrolling past page 1 of results. This was fixed.

Project>End users would sometimes receive an error when trying to create a project from a project template containing more than 100 phases and sub-phases in its project structure. This was fixed.

Project>Our Australian customers reported that when creating a project, the start date would display in MM/DD/YYYY instead of DD/MM/YYYY format. This was fixed.

Project>When updating client for the project, Core would still update invoice and payments when end user clicked 'NO' to the "Do you want to update all previous/Existing invoices and payments to the new client?" prompt. This was fixed.

Project>When using the Project Clone feature, Core would not get the next available auto-increment project number set up in Global Settings>Master Information>Project. This was fixed.

Projects>Australian customers would export project list to csv and all dates were in MM/DD/YYYY format. This was fixed.

Projects>When creating new projects, it was reported that the project would not inherit options set up in Global Settings>Billing>Accounts Receivable>Options>Interest % per month, Payment term and Charge Interest after (Days).

Purchase Order>Long Project "Display As" names would get truncated in the Purchase Order screen. This was fixed.

Report Templates> "Vendor Bills", "Vendor Bill Status" and "Vendor Bills Paid" reports now display the "reference number" and can be filtered by this field.

Reports>"Paid time and expense disbursements" report was missing the payment filter. This was fixed.

Report>Project Time & Expenses report would filter its Account Summary when using dates. This was fixed.

Reports> Financial> Core users reported that vendor bill item transactions would not show up in the General Ledger and General Ledger Extended reports. This was fixed.

Reports> Payment Details report shows a dollar sign instead of British Pound sign in the Grand Total for our UK customers. This was fixed.

Reports> Some Core users have reported performance time out issues when running General Ledger reports. This was fixed.

Reports> The Client Retainer Summary report would not display correct retainer balance when refunding unused retainers. This was fixed.

Reports>AR Aging with Credit Payments would report incorrect Credit column values when the All Dates filter. This was fixed.

Reports>Australian users would report that Core would use and display incorrect date ranges when using the "Last Month" and "This Month" date filters. This was fixed.

Reports>Employee Performance report is incorrectly including unbilled times that are on overhead projects, vacation, sick, or holiday time in some of its calculations. This was fixed.

Reports>Employee Time Detail report would not display any vendor expense entries when using the vendor in the Resource filter. This was fixed.

Reports>It was reported that the contract amounts of Parent Projects with project status of Main were being included in the Contract Analysis report totals. This was fixed.

Reports>Project Account Details report displays Client Hours instead of Hours data in the Hours/units Column. This was fixed.

Reports>Running the "Employee Daily Time Card" Report would display no data when using the Time Entry Date "This Year to Date" filter.

Reports>The Check Details report would not sort by check date then by check number. This was fixed.

Reports>The "Contract Analysis" report would double the project contract amount when the report option "Hide Phases" was set to 'YES'. This was fixed.

Reports>" Time Verification" report received many improvements to enhance report usability.

Reports>" Work in Hand" report received many improvements to enhance report usability.

Reports>" Work in Progress" Details report now has an option to show/hide Account Information if the user needs to reduce the number of pages produced.

Reviewer>Core would not clear system filters when ending the approver navigated to another screen. This was fixed.

Security>Time Entry>Employee Managers could not see employees they manage in 'Staff Utilization' widget unless "Allow Access to Entries of All Employees" security is enabled. This was fixed.

Security>Certain security profiles would not allow users to see Cloud Feed accounts. This was fixed.

Time and Expense Reviewer> Memo field would not display properly after scrolling to the next page and having the Reimbursable Flag column shown. This was fixed.

Time Entries>Adding time entries to an invoice with no time entries via the Batch Update tool would not update accounting tables. This was fixed.

Time Entries>Comp time would get calculated with a weekly frequency when the frequency was set to Bi-weekly. This was fixed.

Vendor Bill>Importing time entries into a Vendor Bill would recalculate Bill Rate and Cost Rate already set in the Time Entries screen. This was fixed.

Updated report templates.

Updated help and other documentation.

Numerous other medium and minor level fixes.

VERSION 1.1.139 RELEASED ON JULY 12, 2019

What's new in this version?

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

Core HR release to market:

Human resources management modules are now available as paid subscriptions. This update adds numerous new features and improvements to the Human Resource Management functions after successfully completing series of beta releases. This release to market version for Core HR adds:

HR Administrator subscription: Full access admin level subscriptions meant for HR managers. Users get access to all HR screens, reports and widgets.

HR Standard subscription: Limited access subscription meant for regular users that allows them to view their Benefits, Salary history, Incidents, Journals and Reviews.

Reimagined **Progressive scrolling:**

In this update, we rewrote our list scrolling algorithms to achieve more responsive and light-weight page scrolling experience. The new approach keeps the page sizes at an

optimum resulting in a responsive and fast paced user experience. Users are presented with the total number of records in the list and column totals thereby minimizing the need to scroll. This update makes it available in all master lists, Time and Expense entry screens, Reviewer and Allocations screen.

Faster, leaner Batch Updates:

This update replaces our batch update feature with the a more efficient and robust algorithm. The new technique not only processes batch update operations in a fraction of the time it took previously but also allows users to select all records at once. Users have the option to select all records that are in view or select all records that are present for the given list and filters.

More to Batch update:

This update adds batch update functions to some of the most requested areas of the application. Batch update function has been added to

- o   Time and Expense Reviewer
- o   Allocations
- o   Gantt Chart

Custom captions and new design for Dashboard widgets:

Users can now rename widgets to suit their needs. This update also showcases the new design improvements that were made to Dashboard widgets to address accessibility and other concerns which included displaying long project, employee and other names, fixed column headers and handling multiple name columns.

Cloud Feeds for Time and Expense Subscription users:

This update opens the Cloud Feeds module to the Time and Expense users. Administrators can now designate an employee to Connected credit card and other accounts giving the employee access to all incoming feeds for that account. Time and Expense users are free to add these feeds as expenses to Core or take other actions like ignore or match to existing Core transactions.

Cloud Feed improvements:

This update adds the ability to batch add cloud feeds as well as split incoming feeds as multiple line items. These splits can also be memorized as rules by indicating a percentage or amount based preference.

Standard Invoice templates redesign:

All our standard invoice templates have been updated with a new design. The design changes focused on providing a higher contrast and improved other design aesthetics as well.

Security updates

This update also adds important security features to prevent and mitigate security vulnerabilities like Cross site scripting (XSS), Cross site request forgery (CSRF) and Cross origin resource sharing (CORS).

Other improvements:

- Batch Invoicing> A new global rule allows users to specify if they want to group joint invoices by root projects.
- Cloud Feeds> Users can now edit the connected bank's nick name and associated employee.
- Cloud Feeds> Added a new security setting that controls if managers have access to all accounts or accounts assigned to them only.
- Cloud Feeds> Users can now indicate if a line item is billable while adding a cloud feed.
- Expense Entry> Users can now specify zero cost rate for an expense and keep the charge amount unchanged.
- Forecasting view> Added filters to all forecasting views.
- Forecasting View>Added the ability to sort by Project or Resource column.
- General> Users can now specify email addresses up to 254 characters.
- HR Reviews> Added the ability to clone existing reviews to a new review.
- HR Reviews> Reviewers are now being notified via email when they are assigned a review.
- HR Reviews> Review templates list has sample data for admin users to get started on creating their own review templates.
- Integration> Users can now choose if expense details should be sent over to AccountRight depending upon project contract or invoice type.

- Integration> Users can now specify project level item accounts and Tax codes for summarized invoices when syncing invoices from Core to Xero.
- Integration> Users can now specify tax code settings for Invoices, Bills and Purchase Orders for Core-AccountRight syncing.
- Integration> Users can now specify tax rates at the item level when sending over invoices to Xero.
- Integration> We allow users to specify tax rates at item level for Xero>Sync Settings.
- Invoice Templates> All system invoice templates now default to hide units by default.
- Invoice Templates> All system invoice templates now group expenses by date by default.
- Invoice Templates> Client address was repositioned to show up correctly when mailed in an envelope.
- Project Performance> Added "Cost" KPI to reveal the true cost metric for the project.
- Projects> Users can choose from new Client Id based options for Project display. The new options combine the Client ID with other Project attributes.
- Purchase Order> Added status as a filter for PO list view.
- Report Templates> "Project Time and Expense" report received several enhancements to increase the report's utility and readability.
- Report Templates> Added a brand-new report that showcases HR review templates.
- Report Templates> Added the "Billable Work History" report that provides a history of billable work done in a company. Organized by project or client, the report displays historical billable hours and amount for services and expenses for the last 12 months.
- Report Templates> Added the "Historical Billing" report that provides information about past billing of a company, thus indicating a billing pattern. Organized by client or project, the report displays historical invoice amounts for the last 12 months.
- Report Templates> Employee reviews report was redesigned to match industry accepted designs for performance and other reviews.
- Report Templates> RFI report now provides links to reveal a report that lists all documents that were attached to the RFI.
- Reports Screen> Added "Project Manager" filter to overdue invoices report.
- Reports> Added the "Active during" filter to Allocation reports. This filters the report for tasks that the resource will be working on for a given period regardless of the task start and end dates.
- Reports> Report descriptions of several templates were updated to describe the report more accurately.

- Security Profiles> Users can now update the name of custom Security profiles.
- Security> Added "HR Administrator" and "HR User" security profiles to allow administrators to easily assign HR functions to managers and Time & Expense employees.
- Security> Several security captions were modified to describe the setting more appropriately.
- Usability> All list views now memorize the sort order specified by the user.

Other fixes:

- Time entries> Companies that widely use custom fields for time entries were experiencing performance issues. This was fixed.
- Allocations> Users were not able to add multiple notification recipients to a task. This was fixed.
- Calendar> "All Day" events would be assigned to the wrong day when the user was in certain non-US time zones. This was fixed.
- Calendar> Clients and other entities would show up in the attendee list dropdown. This was fixed.
- Credit Card>Purchase tax associated to expense entry line items was being ignored in accounting. This was fixed.
- Currency Manager> A recent update had caused the list view to show duplicate records for some countries. This was corrected.
- Custom Labels> User defined labels for Vacation, Sick and Holiday were not being followed in PTO Dashboard widget and other places. This was fixed.
- Dashboard>"Due Projects" widget would only look at the due date of parent projects and ignore phase due dates. This was corrected.
- Employee> Termination details would be reset if a terminated employee was set as active. This was fixed.
- Employee> Users were able to add To-do's to employees that were marked as terminated. This was fixed.
- Expense Entry> The system would incorrectly reset the cost rate to zero if an existing entry was modified for the expense code. This was fixed.
- Forecasting View> Forecasting views had a performance issue related to a large number of allocation entries being present in the system. This was fixed.
- Integration> Sending over the time entries to QuickBooks Online would in-correctly throw an exception if the user had synced the time entries earlier. This was fixed.
- Invoice Templates> Hourly and Fixed Invoice -Accountants version and Cost Plus were missing the retainer summary. This was fixed.

- Invoice> Emailing an invoice to the client in un-attended mode would not mark the invoice as posted. This was fixed.
- Invoices>Auto invoice numbering would ignore leading zeros. This was corrected.
- Payment> The "Close" button for "Bounced check" dialog was not working. This was corrected.
- Print Checks> This list would show un-printed checks for inactive bank accounts. This was fixed.
- Project> Billing contact would remain assigned even when the client was updated to a different client. This was fixed.
- Recurring Checks> The system would not allow users to modify recurring checks if the start date of the recurring entry was older than the Company closing date. This was fixed.
- Report Templates> "Collection Notes" would ignore the project manager filter and show data for all PMs'. This was fixed.
- Report Templates> Contract Analysis report would produce erroneous results when grouping by parent projects. This was fixed.
- Report Templates> Document reports would incorrectly group all documents under one estimate record when filtering for a certain date range and estimate documents only. This was fixed.
- Report Templates>'Employee Missing Time week view' report would incorrectly include employees who had entered more than the required hours for a given week. This was fixed.
- Report Templates>Fully paid invoice would show on AR Aging/AR Aging 8 Steps reports when grouped by "Master project". This was corrected.
- Reports Screen> Users were not able to schedule reports that had an apostrophe in the memorized name of the report. This was fixed.
- Updated report templates.
- Updated help and other documentation.
- Numerous other medium and minor level fixes.

VERSION 1.1.138 RELEASED ON MAY 11, 2019

What's new in this version?

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

- Report Scheduling> Custom reports can now be scheduled for automatic delivery.
- Bill Payments> Users can now view the details of the vendor bills/reimbursable expenses that were paid using Bill Payment module.
- Reconciliation> Added Beginning Balance column to the "Manage Reconciliations" list.
- Time Card> Time card now maintains the order of entries when changing weeks after updating the time card.
- Time Card> Time card now allows users to sort by project even if there is no time recorded for the week.
- Cloud Feeds> Added "Created By" and "Last Updated By" fields to connected banks list view to display the user who added and last refreshed the cloud feed.
- Navigation> Added quick add option for Credit Card entry in the left navigation.
- Dashboard> Added review name column to "HR upcoming reviews" widget.
- Dashboard> Users can now open the specific employee review record when they click on the review name in "HR Upcoming Reviews" widget.
- Documents> Added "Provider" column to all document lists to reveal the cloud provider associated with the document.
- Globalization> Added 57 new countries to the Country and currency lists.
- Batch Billing> Users are now prompted if they want to mark time or expense as billed in Batch billing>Time or expense details,
- Integration> Added "Payroll setting" to AccountRight sync settings to allow users to specify custom Payroll categories when sending over time entries to AccountRight.
- Integration> Core now allows AccountRight and Xero users to choose if they want to send MST and MET associated with invoices as line items.
- Invoices> Added new invoice templates and settings that support custom ordered time and expense entry line items in a detailed format.
- Projects> Added important columns like phone, email and contact type to Project contacts tab view.
- Projects> Changing a project type from marketing to other contract types now prompts users if they want to mark the existing time and expense for the marketing project as billable. The user gets multiple options to choose from.
- Projects> Users are now prompted if want to assign the budget, estimate or fee schedule to the phases of a project when any of these entities is assigned at the parent project level.
- Purchase Order> Users are now prompted to confirm if they want to receive more than the ordered number of units when receiving items against purchase orders, in case they enter a quantity that is greater than the number of units ordered.
- Report Templates> Added "Taxable Amount" column to Tax registry report to correctly indicate the value of entries that were taxed.
- Report Templates> Added new group by options to "Invoice Register" report.

- Security> Context driven reports for this screen now allows the user to filter the reports for selected employees only.
- Security> It is no longer allowed to change the security profile of the owner account to anything else than "full access".
- Security> Added a security feature that invalidates user access token on sign out.
- Infrastructure> Added route extension capability that will allow us to redirect requests from apps like public API, Core AI etc. to dedicated servers.

Fixes:

- Accounting> Some accounting screens like Checks, Credit Card and Vendor Credit would show the un-deposited funds in the account dropdown. This was corrected.
- Allocations> Users were not able to select an employee or vendor group in the filter list. This was corrected.
- Allocations> Users were wrongly being notified that the task has been completed while setting up notifications for the task. This was fixed.
- Batch Billing> Project and Client Manager Dropdowns did not differentiate an employee from a vendor. This was fixed.
- Billing Schedule >Progressive scrolling not working in billing schedule when sorting billing schedule in descending order on 'priority number' column. This was fixed.
- Check> Check details report was not respecting Print status filter. This was fixed.
- Checks> General Journal entry created when voiding a check was being incorrectly dated for today's date. This was fixed to reflect the check date.
- Cloud Feeds> "Manage Rule's" screen did not remember column sorting. This was fixed.
- Cloud Feeds> Users were able to select main type projects as project for the time or expense entry when adding feeds to Core. This was fixed.
- Cloud Feeds> Users were not able to add an accounts based cloud feeds without specifying a payee. This was corrected.
- Cloud Feeds> When creating a transfer transaction from a bank feed, users were able to select income and expense accounts also. This was fixed.
- Create Batch Invoice> A side effect of a recent enhancement would cause the time entries to stay locked even after the biller had exited the batch invoices screen. This was fixed.
- Credit Memo> Users were being allowed to pay more than credit memo amount when paying off the credit memos in the pay bills screen. This was fixed.
- Deposits> Users were able to edit deposits created from cloud feeds without a warning prompt letting them that the entry is connected to a feed. This was fixed.
- Documents> File upload would occasionally fail for "Box" and "One Drive" users. This was corrected.

- Employee> Performance screen widget was using the Client hours instead of the actual hours to calculate the Utilization. This was fixed.
- Employee> Terminate employee function would check for HR subscription. This was fixed.
- Fee Schedule> Employee Control was not working when an existing service or expense entry was being updated. This was corrected.
- Fee Schedule> Users were not being prompted to enter all required fields when saving a service or expense line item. This was corrected.
- General Journal> Cloning a general journal was using the date of the original entry. This was corrected to use today's date.
- General Journal> Users were being restricted to pick only bank and credit card accounts when creating cash General Journal entries. This restriction was removed.
- General Journal> Inactive employees and vendors were showing up in the linked field column dropdown. This was fixed.
- General> Core address fields would fail to show the address in Google maps. This was fixed.
- Global Search> some characters like '#' would throw off the search and result in an error. This was fixed.
- Global Setting> Updating project "display as" settings for a company with a very large project list would fail to complete. This was fixed.
- Groups> Assign groups list view was un-necessarily showing already assigned items. This was fixed.
- Groups> Quick search for unassigned entities would take too long to retrieve results for user with large data. This was fixed.
- Integration> Sending over an invoice to Xero was incorrectly looking for Core COA security. This was fixed.
- Integration> Core employees that were synced to QuickBooks would not appear as synced when they were converted to Vendors. This was fixed.
- Integration> Invoices with line item taxes were not being synced to Xero. This was corrected.
- Integration> Users with no access to invoices and payments were not able to send these entities to QuickBooks. This was fixed.
- Integrations> "Show inactive only" would not work in QuickBooks project record mapping. This was fixed
- Integrations> Last sync date would be set to empty if the user disconnected from the integrating software. This was fixed.
- Invoice Templates> some templates would not show correct custom label for the fax field. This was fixed.
- Invoices Templates> Joint invoices would not show the retainer summary even after the global setting rule for this setting was set to true. This was fixed.
- Invoices> "Un-post" is now restricted to only those invoices that have no payments.
- Invoices> Account Summary would not include the current invoices in the "Billed to Date" summary for draft invoices. This was fixed.

- Invoices> CSV export would not respect all screen filters. This was fixed.
- Invoices> the overdue column would not be calculated correctly for users other than US time zones. This was corrected.
- Invoices> Users with no access to apply discount feature were being allowed to update invoices for discounts using the batch update feature. This was fixed.
- Manage Subscriptions> Users were not able to sort records in Inactive subscription list. This was fixed.
- Manual Invoice> "Link approved TE/EE" would fail to bring up any entry in edit draft invoice mode. This was fixed.
- Manual Invoice> Filters in the approved Time expense view were not working. This was fixed.
- Performance Reviews> Review templates would incorrectly add the "additional remarks" for free flowing text type questions. This was corrected.
- Project> Project category notes created in invoice or collections screen were not showing up in the Project>Notes view. This was fixed.
- Project> Users typed text for "Message on Invoice" was incorrectly being changed to sentence case. This was fixed.
- Projects> A recent change would not allow fee schedule, budget and estimate to be assigned at the parent project level. This was fixed.
- Projects> Batch update would ignore phases and only update parent projects. This was fixed.
- Projects> Un-deposited funds account would show up in the income and expense account dropdowns. This was fixed.
- Projects> Users were not able to assign multiple projects to groups using batch update. This was fixed.
- PTO> Documents for this screen would only show the first 25 records. This was corrected.
- Purchase Order> Users were not able to select projects of type main while entering line items for the PO. This was fixed.
- QuickBooks> A certain scenario would cause the QBO time entry to be synced to the wrong Project in Core. This was corrected.
- QuickBooks> Unmapped lists would behave erratically if the user would search for records in both the lists. This was corrected.
- Manage Reconciliation > Column headers for this screen would not be persisted on scroll. This was fixed.
- Manage Reconciliation> List would only displays 25 records. This was fixed.
- Recurring Invoices> Next billing date would show an incorrect next billing date when the recurring invoice was set to process automatically. This was fixed.
- Registers> Users were being allowed to pick both AP and AR accounts in the splits. This was corrected.
- Report Templates> several financial and payments reports received a makeover and new options and filters.

- Report Templates> "Time and Expense by Parent Project" was enhanced with new filters and options.
- Report Templates> "1099/1096-MISC (US)" report's "Show Check details" parameter fails in a user scenario. This was fixed.
- Report Templates> "Employee Performance" report would not show correct data when the Last fiscal year filter was applied. This was fixed.
- Report Templates> "Employee Utilization" report would consider comp time for calculating employee utilization. This was fixed.
- Report Templates> "Employee Utilization" report would include billable sick, vacation and holiday hours. This was fixed.
- Report Templates> "HR Benefit Usage" report was including vendors. This was corrected.
- Report Templates> "Project Profitability" report did not display expense cost on the report. This was fixed.
- Report Templates> "Work in Progress details" report would ignore cost rate and cost security. This was fixed.
- Report Templates> 1099/1096 report would incorrectly double the amounts if the vendor had more than one address specified. This was fixed
- Report Templates> Added "Provider" column to the documents reports.
- Report Templates> "AP Aging" reports had a performance bottleneck and would fail on large user data. This was fixed.
- Report Templates> "AP Aging with Credits" would not match with General Ledger Report for some users. This was fixed.
- Report Templates> Benefit Usage report now provides sub totals for each employee.
- Report Templates> Employees exceeding the required hours would show up on the "Missing Time" report. This was fixed.
- Report Templates> some reports would use the legacy term A-Hours instead of Hours. This was fixed.
- Reports> "HR Benefit Usage" would not filter the report for the provided period date when viewed through the Benefit usage screen. This was fixed.
- Reviewer> Export as CSV would ignore the expense entries. This was fixed.
- RFI> Filter by status would not work. This was fixed.
- Security> "Allow Access to Custom Reports" security was being bypassed if the report was marked as favorite. This was fixed.
- Security> Profile name with an apostrophe in the name would be titled incorrectly. This was fixed.
- Submit-Approve> Approving a reimbursable expense would clear the income and expense accounts from the expense entry in a certain security scenario. This was fixed.
- Time Card> the next and previous week buttons would not work correctly for some countries. This was corrected.

- Time Entry> Fee schedules rates were not being applied when an existing time entry was set to overtime. This was fixed.
- Timer> Deleting a timer was not deleting the documents attached to it. This was fixed.
- Timers> Users were able to save timers with no description. This was fixed.
- Vendor> A user data scenario would cause the transaction tab to not show vendor payments. This was fixed.
- Vendor>Transactions would not be sorted correctly when sorted by descending date. This was fixed.
- Updated report templates.
- Updated help and other documentation
- Numerous other medium and minor level fixes.

VERSION 1.1.137 RELEASED ON APRIL 6, 2019

What's new in this version?

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

- **Core HR Beta improvements:** As promised, this installment offers powerful new features as well as major improvements to the existing HR offering, including:
  - Employee Performance reviews
  - Employee Incident management
  - Employee Journal management
  - HR Forms
  - Enhanced Benefit management
  - Time Card based benefit
  - PTO-Benefit association
  - Brand new HR widgets and reports
  - HR specific security profiles
  - In Beta and free till June 30th

- **Push Notification for Mobile**: This update marks an important milestones for our mobile first design philosophy. Core iOS and Android apps now support instant workflow and other notifications that are pushed to mobile devices of users that have enabled this feature in their Core mobile apps.

- **Integrated Tooltips**: All Core lists and screens will now have tooltips. They offer a quick help option that explains certain data fields, Info Bars and Widgets. Users can use this on-demand option to get simple and effective explanations.

- **In-app Sample company access for paid Users**: Paid users will now be able to use the switch to "Sample" option inside their company file. They can use this option to try any of our five sample company files. We have also placed a convenient "Exit Sample" option to sign them back in their original company file.

- **Benefit InfoBar for PTO:** PTO Users will now get a full snap shot of their benefit information when requesting PTO. Non-Core HR users that use Employee permissible hours and PTO can use this as well.

- **Send Time entries to MYOB AccountRight**: Core - MYOB AccountRight integration now supports sending time entries to MYOB AccountRight.

- **Combine Security Profiles**: Admin users can now create new security profiles by combining one or more security profiles! The new profile will contain all security settings from all security profiles chosen.

- **Enhanced Global Search**: Global search was enhanced for ease of use and better handling of search results.

- **Custom Labels for Time off categories**: Admin users can now customize time off category labels like Vacation and Sick to a term that they use.

Other Improvements:

- Create Batch Invoice> Filters and parameters defined by the biller will now be remembered for the next billing cycle.
- Create Batch Invoice>Added a new "Active Records only" switch that processes only active records for billing.

- Check Printing>Voucher details option received several enhancements that improved the tear off section of the check to show more useful information and also handle several scenarios.
- Invoices>Added a new "Un-post" batch action to allow billers to un-post invoices.
- General>Added Client Column to all Project dropdowns in the application.
- Statements>Users can now specify a personalized message for each Client before sending out statements.
- Statements>Users can specify an "Aging Days" filter to narrow down clients with pending payments.
- Report Templates>General Ledger reports now provide an easy option to show the report without details.
- Report Templates>Statement reports now display the Statement date on the top of the report.
- Report Templates>"AR Aging with Credit Payments" report now includes an option to show General Journal entries.
- PTO>Time entries tied to a PTO entry are automatically updated when the underlying PTO is modified.
- MYOB AccountRight Integration>Users can now specify a Tax code for activities that are sent over to AccountRight. This is important to handle taxes correctly when sending over invoices.
- Subscription>Billing subscription has access to all three income and expense widgets now.
- Subscription>Manager Subscription has access to "Work In Progress" report now.

Fixes:

- Activity and Expense> Item filter dropdown would include inactive items. This was fixed.
- Allocation and Forecasting>Allocations that were reset to zero units in the manual view would still show in the Allocation view instead of being removed completely. This was fixed.
- Allocation and Forecasting>In the Manual View, the spacing of columns would not adjust based on number of columns shown or hid. This was fixed.
- Auto Complete>An issue with the feature would cause it to work erratically for a large list of similarly spelt Autocomplete shortcuts. This was fixed.
- Batch Update>It was not possible to remove assigned fields like Budget, Estimate etc. using batch update. This was fixed.
- Client>Retainer Balance and Margins widget were not working on last month/custom date filter. This was corrected.
- Create Batch Invoice>Apply discount amount in percentage would cause the system to ignore the 'Apply discount to pre-tax' Global rule. This was fixed.

- Create Batch Invoice>Invoice Memos were not getting updated via batch update. This was corrected.
- Create Batch Invoice>WUD Amount on an Extra Time Only Invoices was getting recorded as part of contract when changing the net bill amount. This was fixed.
- Custom Fields>Users were not being allowed to delete custom fields when the view option was set to "All". This was fixed.
- Dashboard>"Active Accounts" widget would include balance sheet accounts by default. This was fixed and the widget now defaults to income and expense type accounts only that are active in the current fiscal year.
- Dashboard>Client Performance widget would incorrectly include debit payments. This was fixed.
- Dashboard>Retainer balance widget was showing an unnecessary long list by including Clients with no retainer activity. This was corrected.
- Dashboard>Some of the widgets would show entities like Accounts in all caps. This was fixed.
- Dashboard>Staff workload widget would not handle the project filter correctly and fail to retrieve any data. This was fixed.
- Documents>User defined attachments that had the same file name were being overwritten for Amazon storage users. This was corrected.
- Expense Entry>Users with sufficient permissions to change the expense currency were not able to change it. This was fixed.
- Fee Schedule>Bill rate multiplier would not work as expected for details that specified Employee groups. This was corrected.
- Fee Schedule>Fee Schedule update would not work if the Fee schedule Cost rate was empty and the user has no access to Cost rate. This was fixed.
- Gantt chart>Month names were not being localized as per user region. This was fixed.
- Globalization>Fixed a bunch of issues related to decimal character for some countries like Belgium.
- Invoice Templates>Invoice memo and TE memo setting specified for the template in GS were not being applied. This was fixed.
- Invoice Templates>Phased Invoice template was not respecting the "Show GST" rule. This was fixed.
- Invoice Templates>There were several instances when an invoice would not use the Employee display as field. This was corrected.
- Manual Invoice>"Approved Time and Expense" option would fail to show approved entries for most manual invoice create options. This was fixed.
- Payment>Add new alert that would inform the user if the required fields were not filed by the user.
- Project Assignments>An issue in the project assignments for item groups would cause the time entries to be marked as non-billable by default. This was fixed.
- Project> Users were not able to assign contract employee and outside consultants as Project managers. This was fixed.

- Project>Users with country profile different than that of the Company were not able to save any projects. This was fixed.
- Reconcile>Users were not able to reconcile system defined accounts that are eligible for reconciliation otherwise. This was fixed.
- Recurring Invoice>Back dated period invoices when processed would have all the approved time and expense be associated with the first invoice being created. This was fixed.
- Recurring Invoices>Invoices created for recurring type contract type projects would sometimes be created a day earlier than expected. This was fixed.
- Report Template> Project Principal and Project Originator filter and group by option was added to multiple reports including "Work in Hand", "Contract Analysis", "Gross Margin" and "Project Profitability"
- Report Templates> "Employee Utilization" report and "Staff Utilization" Dashboard widget would show different results in some cases. This was fixed.
- Report Templates>"AR Aging" reports when memorized would leave the "Show GJ" option enabled even if the "Show Invoices" option was disabled. This was fixed.
- Report Templates>All performance reports were enhanced with transaction date filters.
- Report Templates>General Ledger reports now present a legend explaining the balance column.
- Report Templates>Some reports would use project ID or Name instead of relying on the Display as attribute of the Project. This was corrected.
- Report Templates>Taxes report would only show data if there were taxes collected. This was fixed so that other information like Service and Expense amounts shows up for the benefit of the user.
- Reports Templates> Refunded retainer would not show up on the Cash Receipts report. This was corrected.
- Report Templates>Added important grouping options like Project Manager, Originator, Contract Type etc. to many reports like 'Time and Expense by Parent Project'
- Report Templates> "Trial Balance YTD" report was not respecting the fiscal year defined for the company. This was fixed.
- Report Templates>"Project Performance" report was not using the correct formula for Earned value and Earned Value percentage fields. This was fixed.
- Report Templates>Most financial reports were not respecting the fiscal year when filtering as of a certain date. This was corrected.
- Scheduled Reports>When creating a scheduled report, the schedule time would be off by a minute for some specific time zone users. This was corrected.
- Reviewer>A user with "Update" security was not able to update memo or description unless the user was also provided "Update Rates" security. This was corrected.
- Time Card>The screen would allow users to input double decimals and not warn the users causing data loss. This was fixed.

- Timer List>Newly created timers would not be displayed at the top of the list. This was fixed.
- Vendor>Performance screen would not respect the cost rate security. This was corrected.
- Xero Integration>Vendor address details would get duplicated if the vendor was updated in Xero. This was fixed.
- Updated report templates.
- Updated help and other documentation
- Other minor fixes.

VERSION 1.1.136 RELEASED ON FEBURARY 23, 2019

What's new in this version?

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

- **Demo video for new users:** New signups are now presented with an in-app "Getting Started" video during sign up. Trial users can also access this video by clicking the "demo" link located conveniently in the top menu.

- **Know your account and reconciled balances from the Dashboard:** Added a brand new "Account Balances" widget that lists account and reconciliation balances in a bar chart graph.

- **Updated Accounting widgets**: Recently added accounting widgets received a face lift and other optimizations.

- **Guaranteed Reconciliations**: Account Reconciliation process now verifies integrity of the reconciled transactions before saving the reconciliation.

- **Account Reconciliation now supports date periods**: Account Reconciliation screen now allows users control the transactions list by providing a date range filter.

- **Beginning balance in General Ledger reports:** All General ledger reports were updated to include beginning balance for each account. This is very useful when running reports for date ranges.

- **Batch Merge Projects:** Project list view now offers "Merge" as a batch action to combine multiple projects in a single click.

- **Configurable project dropdowns for report filtering**:   Reports view now allows user to specify if they want inactive and other projects to appear in filter drop downs.

- **Choose your preview format**: Report preview now allows users to specify the preferred output format. Users can choose "Viewer" or "PDF" and the choice will be remembered for the specific report.

- **Print Core Subscription Invoices:** Users can print/preview Core subscription invoices from 'Billing History', Manage Subscriptions.

- **Xero integration now supports "Tracking Category":** Core classes can now be sent to Xero as "Tracking Category" and also imported as Classes. These two entities can mapped as well.

- **Project Accounting got stronger**: General Journal now allow users to associate a Project to the line items.

- **Project multiplier report:** Added "Project Cost Multiplier" report that calculates the cost multiplier based on project costs and billing amounts.

- **Report security made easy:** Report template security has now been moved to a separate tab in Security module.

Other Improvements:
- Added Over time (OT) filter to all Time entry reports.
- Added "Allow access to custom fields" to Invoice security.
- Added Comp Time column to the Employee Paid Time off Hours report.
- Some columns like "Cost Amount' were re-positioned in Expense entry for better UX.

- Added "Assigned Project(s)" column to Purchase Order list view.
- Users are now warned when modifying transactions that were imported from cloud feeds.
- All AR Aging reports now provide uses an option to include General Journal entries.
- Dashboard totals are now anchored to the bottom of the widget. Previously, they would move away on scrolling.
- Most list views in Core would incorrectly capitalize the first letter of Display as/ID fields. This was fixed.
- Added grand totals to forecasting range columns in Forecasting tab of A&F.
- Documents list would not show any contextual reports when viewing documents related to 'Budgets' and 'Estimates'. This was fixed.
- Implemented "Add New" security to memorized and scheduled reports.
- Added "Export Sales tax as a separate line item" setting to LEDES export.

Fixes:

- Billing schedule reminder date would not generate a reminder for the user. This was fixed.
- Phased and Joint invoices were not displaying Cost Plus information. This was fixed.
- Project Assignments report was not displaying the billable status for activity assignments. This was corrected.
- DCAA compliance settings would not allow users to save vendor bills that were created from scratch. This was fixed.
- AP Aging with Credits report was not able handle situations where a vendor bill was completely marked as paid using credits. This was fixed.
- LEDES export would not handle "Send Item Level Sales Tax" correctly. This was fixed.
- Updating an expense entry that is tied to a credit card would throw off the credit card amount. This was fixed.
- Bill and Cost rates of existing employees would be reset to 1 when invited as users. This was fixed.
- Deposit entries created from existing payments were not inheriting the class field specified for the project. This was fixed.
- An issue with the Project manager drop down would cause employees other than the logged user to now show up. This would happen if the user had no access to the employee screen. This was fixed.
- An issue in the AP Aging report would cause it show a balance different than the Balance Sheet. This was corrected.
- Batch invoice, Export to CSV would only export the first 25 records in view. This was corrected.
- Transaction details on Cash basis report would not respect the date filters. This was fixed.

- An issue in Groups assignment would cause records outside the search results to be added to the group. This was fixed.
- Auto increment invoice number feature would leave out leading zeros from the next invoice number. This was fixed.
- Batch invoice would leave out some projects when using project groups. This was corrected.
- Auto increment project Id feature would leave out leading zeros from the next project ID. This was fixed.
- An issue in Invoice Collections>Payment history would add debit type payments causing wrong grand total. This was corrected.
- Some validation errors would cause user frustration as they would not know which specific field is failing validation. This was overcome by bringing the specific tab into focus and red lining the field.
- Several reports under Company, Employee and Project categories were enhanced for options, look and feel and other attributes.
- "Group Assignment" report would fail to preview if group filters were applied. This was fixed.
- Invoice template would fail to show the Tax ID if the masking for Tax ID was set to none in Global Settings. This was fixed.
- Several users had complained about instances where their clients had received empty Cash receipts. This was fixed.
- Merge Vendor function would cause some of the Bill Payments associated to the original vendor to not show up in Vendor>Transactions. This was fixed.
- An issue in the "Employee Allocation" and "Staff workload" widgets would cause them to ignore tasks with activity groups. This was fixed.
- Clicking on the notifications areas was not refreshing the badge number. This was fixed
- The sum of item level taxes was not being included in the INVOICE_TOTAL field of the LEDES 1998B export. This was fixed.
- Users with no access to any of the reports under one or more report categories would still these categories. This was fixed.
- Users were unable to update the retainer amount in draft manual invoice. This was fixed.
- Global setting rule "Zip email attachments" would cause payment receipts to be sent as zipped files. This was fixed.
- Document tabs in Time and Expense entry view would only show the first 25 documents. This was fixed.
- User defined custom field now appear at the bottom of the filter list to facilitate ease of use.
- Subscriptions, Billing History did not show more than 25 records. This was fixed.
- Users were not being prompted with a proper message if the underlying cloud connection has been disconnected and the user was accessing a document connected to the account. This was fixed.

- Merge Activity function was not copying the documents over to the merged record. This was fixed.
- Profit and Loss widget would drop the profit line if the company has no expense entries for last 12 months. This was fixed.
- Performing a sort in Time entry would cause certain column headers to use ellipsis instead of showing the full text. This was fixed.
- Certain list view like Deposits, Fund Transfers and Credit Card screens would lose the sort caret after filers were applied. This was fixed.
- Users were able to delete bill payments even if it failed the company closing date test. This was fixed.
- Users were able to delete vendor credits even if it failed the company closing date test. This was fixed.
- Client contact e-mail tag in LEDES XML file would display the client contact's fax details instead of e-mail. This was fixed.
- GS > Auto apply retainer to invoices. The retainer was not being applied automatically to the invoices of projects that had an active billing schedule. This was corrected.
- Void Invoice template would not display PO number. This was fixed.
- "Estimate Comparison by Client" report would not group by Client. This was fixed.
- An issue in the event detail view would prevent users from deleting attendees. This was fixed.
- Updated report templates.
- Updated help and other documentation
- Numerous other fixes and optimizations.

VERSION 1.1.135 RELEASED ON JANUARY 12, 2019

What's new in this version?

This update addressed various issues and added a few enhancements. Most notable ones include:

- Added brand new financial accounting widgets for comparative analysis of Balance Sheet and Profit and Loss statements.
- Added 'Account Balances' widget that allows users to see monthly and YTD balances for active accounts.
- Added the Vendor Group filter to all vendor-specific reports like 1099, Vendor Bills, Expenses by Vendor, etc.
- Enhanced the 'Expense by Vendor' report to include all vendor transactions along with important details of the transaction.
- Added an option to hide phases and roll up totals by parent project for few reports like 'Project Profitability' and 'Contract Analysis'.
- Added an option to hide late fee invoice transactions from A/R reports.
- Added a new option to group Statement reports by client and then by project.
- Added an option to edit the associated purchase order when receiving items for that PO.
- Added the ability to specify individual vendor filters for getting vendors in Sync Settings section of Xero integration.

Other fixes:

- Checks and credit card transactions that were used to pay bills would not appear in the Cloud Feeds, 'Find Match' list for the specified Core bank or credit card account. This was corrected.
- An issue in rounding for MST and MET would cause the invoice total to be off by a penny. This was corrected.
- Applying an adjustment for a credit card reconciliation account would show incorrect journal. This was corrected.
- Bill Payments would not adjust the payment amount correctly if one or more existing entries were excluded. This would happen for non-US companies and was corrected.
- An issue in the A/P reconciliation report would not display all un-cleared transactions. This was corrected and the un-cleared entries are now shown as a summarized item with an option to drill down.
- Income vs. Expense widget had issues for the 12 weeks filter. This was corrected.
- Google Drive users were reporting multiple issues regarding connection and accessing existing documents. These were fixed.
- QB Online expenses would not come over to Core if the payment method was not specified there. This was fixed.
- Client statements emailed from the Statements screen would not respect the date filters. This was corrected.
- Cloud Feeds screen had UI issues if the company had more than 25 connected accounts. This was fixed.
- Bill Payments would not automatically reflect the correct balance for default payment account. This was fixed.

- A recent update had caused the sort caret to disappear in multiple screens after the user had progressively scrolled the list. This was fixed.
- Users were not able to delete the time and expense entries linked to a credit card, check or vendor, and marked as billed. This was corrected.
- Bill Payments detail would not show the reference number for associated bills, credit memos or reimbursable expenses. This was fixed.
- Users were able to apply payments for invoices prior to the company's closing date. This was fixed.
- The Change Invoice Date feature in Invoices would allow users to change the invoice date to dates prior to company's closing date. This was fixed.
- Emails sent by the Schedule Reports feature would add a system defined footer to the email. This was removed.
- Phased Invoice with Expenses would incorrectly club the tax amount for extra expenses with non-extra expense amount. This was fixed.
- The system would fail to prompt the user when deleting a reconciled bill payment. This was corrected.
- An employee with default group 'All' was not being assigned a default group when converted to a vendor. This was fixed.
- RFI screen based report would not respect the screen filters. This was fixed.
- Info Bar in Vendor credits would not show correct summaries for some of the date filter ranges. This was fixed.
- An issue in time and expense reports would only bring in expenses when date filter was specified. This was corrected.
- A user specified credit card would not appear in the existing Credit Cards list when it was used at least once to purchase subscriptions. This was corrected.
- Users were able to delete billed time and expense entries in the Credit Cards detail screen. This was fixed.
- Credit card transactions would show the 'Purchased From' field as empty if the original vendor was merged to another vendor.
- Billing reports were upgraded for cosmetic changes.
- Updated report templates
- Updated help and other documentation
- Other minor fixes

VERSION 1.1.134 RELEASED ON DECEMBER 15, 2018

What's new in this version?

This update addressed various issues and added a few enhancements. Most notable ones include:

- 'Compose Email' screen was enhanced to allow users to remove existing and new attachments. A new column was added as well to show the size of attachments, allowing them to make an informed decision before sending emails with attachments.
- 'Notes' list under productivity tools now has an option to show all notes.
- Users can now specify a free flowing mask for zip codes, phone numbers and other attributes that support masking.
- Transactions like invoices can now be previewed using an in-line 'Preview' action in the transactions tab of Project detail view.
- Users can now update invoice memos from the detail view of an invoice.

Other fixes:

- Notifications icon would not update the badge number to indicate recurring invoices that are ready to be processed. This was corrected.
- The document hyperlink column in the document list view would navigate the user to the detail view of the document, instead of previewing the document. This was fixed.
- Invoice list in payment detail view was not sorting correctly for project and invoice numbers columns. This was corrected.
- Upon applying a new payment, users were incorrectly being navigated to the payment list even when the payment was initiated from 'Invoices' or 'Invoice Collections'. This was fixed.
- Contract Analysis report would not show non-active projects even when the report was filtered for the same. This was fixed.
- Statement reports did not print the current date. This was corrected.
- Added the 'Show Tax' parameter to 'Billing Forecast' report to specify if the computed amounts should include taxes.
- Users were being allowed to void a check prior to the closing date. This was corrected.
- Parent Project rules were not being copied to the underlying phases if the hierarchy was more than one level deep. This was fixed.
- An issue in the Project template logic would prevent users to create template based projects, if one or more of the phases had the same phase description and the project 'display as' setting included 'Phase Description'. This was corrected.
- An issue in the Estimate detail screen would prevent users to update line item descriptions. This was fixed.

- An issue in the Project structure tab would prevent users from updating contract amounts. This was fixed.
- Invoices belonging to a project that used a custom invoice template would fail to preview when opened from the project detail view. This was corrected.
- Creating a new budget with an apostrophe character in the budget name would throw an error. This was fixed.
- 'AP Aging with Credits' report would show a balance even though credit memo transactions had been paid. This was fixed.
- Client and Budget reports were refreshed with cosmetic updates.
- An issue with 'Fee Schedules' report would make the report not hide the cost rate even if the security specified otherwise. This was fixed.
- 'Fund transfers' list would not remember the last used date filter. This was fixed.
- An issue in code would mark a reimbursable expense as non-reimbursable after the paid flag was updated to false. This was fixed.
- The module column in 'Document' list view under productivity tools would show up as empty in certain scenarios. This was fixed.
- Statement report would add a blank page between invoices that were associated with the same project but billed to different contact addresses. This was fixed.
- 'Bill Payment' transactions that were already reconciled would appear as 'not reconciled' in the Credit Card register. This was fixed.
- Few restricted account types such as 'Accounts Payable' were appearing in the income and expense account dropdown in Project view. This was fixed.
- Time entry memo created out of text that was pre-formatted and copied to the memo box would appear garbled in the Invoice detail view. This was fixed.
- The system was allowing users to create recurring invoices for projects that had already been completed. This was corrected.
- Updated report templates.
- Updated help and other documentation
- Other minor fixes.

VERSION 1.1.133 RELEASED ON DECEMBER 1, 2018

What's new in this version?

This update addressed various issues and added a few enhancements. Most notable ones include:

- Added the ability to update the 'Principal' and 'Originator' fields for multiple projects using the batch change action in Projects list.
- Added default sort order to Clients, Employees, and Vendors, Classes, RFIs, To-Dos and Notes screens.
- When changing Project Account in Projects > Billing Options, users can now decide if existing time and expense should be updated with the option to choose from 'All', 'Billed', 'Un-Billed' or 'None'.
- Added the Payee column to 'Accounts Reconciliation' screen.
- Invoice register report now provides an option to view draft invoices also.
- Added the 'Name' column to 'General Ledger-Extended' report for vendor bill and other transactions.
- Core will now remember the search text in the any of the list views when the user navigates to the detail view and then navigate back to the list view.

Other fixes:

- Grouping the 'Billing Forecast' report by 'Master Project' would sometimes show incorrect billed amount for project phases on joint/combined invoices. This was fixed.
- Overtime calculations were not consistent when using the Automatic Overtime feature versus the Overtime calculator. This was fixed.
- When paying reimbursable expenses, users would get a "You cannot apply payments more than the pay amount" error. This was handled.
- Added default sort to the Project column in the 'Manual' view of Allocation & Forecasting.
- Project rule "Use rates from Activity Items screen" was re-labeled to clarify that it includes both cost and bill rates.
- 'Billing' and 'Manager' Package users could see certain standard and custom financial accounting reports. This was prevented.
- Using the Cloud Feeds > Find Match option would display a list of duplicate credit card payments entered in Core. This was corrected.

- Enabling the "Mark projects completed when 100% billed" in Global Setting would incorrectly update project phases on joint/combined invoices that were not billed 100% of the contract amount. This was fixed.
- Files added directly from the Documents or Purchase Orders screen would not get attached when a PO was emailed from the Email > Compose Mail screen. This was fixed.
- When previewing a combined invoice, Core would sometimes display incorrect PO number for projects with different PO numbers. This was corrected.
- The Class assignment at the Project level would not be inherited by the project in the Edit Checks screen. This was fixed.
- Employee Control 'Billable' flag setting was not being applied when creating transactions in the Checks, Credit Cards, Vendor Bills and Cloud Feeds screen. This was implemented.
- Sort order was not remembered when refreshing some screens. This was fixed.
- The Project Allocation and Employee Allocation Units reports would not show accurate data for allocation entries with no end date. This was fixed.
- Memo added to a retainer invoice did not show up on previewing that invoice. This was corrected.
- Employee Control was not being obeyed when using the Cloud Feeds > Find Match option. This was fixed.
- Users were able to create purchase orders for 'completed' projects using Budgets > Create Purchase Orders option. This was fixed.
- Updating the date of a check with linked time or expenses would also update the time and expense entry date. This was fixed.
- Un-posted entries of accounts linked in Cloud Feeds were being included in the Cloud Feeds > Pending Transactions total. This was corrected.
- Phased Invoice template would not display column headers on its second page. This was fixed.
- When using the 'As Of' period filter in the Purchase Orders list screen, Core would display duplicate POs when scrolling down to the next page of the list. This was fixed.
- The on-screen Vendor Bill List report was applying the screen filters. This was fixed.
- Help file was updated.
- Several other minor general and report fixes were made.

VERSION 1.1.132 RELEASED ON NOVEMBER 17, 2018

What's new in this version?

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

- Added the 'Mailing Labels' report with options to generate mailing labels from the client, project, employee and vendor address records.
- Added the 'Group Assignment' report that displays assigned groups. This report can be run for projects, clients, employees, vendors, activity and expense codes.
- A memorized report marked as public can now be customized by users other than the original author.
- Scheduled reports can now be marked as public to make them available for other users.

Other fixes:
- Excluding a reimbursable expense in the Bill Payments screen would clear its 'Reimbursable' flag.
- There was no sort feature on the Memorized, Scheduled, Custom and Favorite tabs in the Reports screen. Also, the Group/Report grid list had an unnecessary Description field. That was removed.
- Added the "Allow access to Custom Reports" security permission in the Security > Reports screen.
- The Employee Control security permissions were not being implemented in the Checks and Credit Cards screen.
- Employee Control was not being implemented in the Cloud Feeds screen.
- Item level taxes on manual invoices would not show up in the Taxes report in some cases.
- Credit-type, write-offs and debit payments were not being excluded from the Cash Flow widget calculations on the Dashboard.
- The Expense Entries Multiplier field was editable for entries that were already paid or linked to vendor bills.
- The Phased Invoice template did not include billable negative entries in its Grand Total calculations.
- In the Project Assignments screen, the Project drop-down did not obey the Global Settings > User Interface > Display As settings.
- Sometimes assigning an invoice template to the corresponding project from the Invoices > Preview > Choose Template screen would not save the new template setting. This happened to regular invoices as well as joint/combined invoices.
- In the Account Reconciliation History screen, the Reconciled On date would not reflect the correct date when users actually did the reconciliation.

- Notes in the Invoice Collections screen would not display in chronological order or sometimes would display blank values.
- The 'Retainer Details by Project' report would not obey the "Payment Date As Of" filter.
- In certain cases, HTML data would show up in the Time Detail memos while looking at the invoice details.
- Purchase order reports would display duplicate or triplicate line items in case the vendors had two or three address records.
- When adding attachments to an expense entry with filters on in the Expense Entries screen, it would remove the filters.
- When changing the project Due Date label to a different value, the new label would not show up in the report filters.
- At times, the Profit and Loss Accrual Basis report did not match the General Ledger report.
- MYOB Record Mappings screen would display duplicate vendor bill entries in certain cases.
- Column header did not remain fixed when scrolling down in the Cloud Feeds screen on both the Ignored and Included tab.
- When combining invoices in the Create Batch Invoice screen, the % complete field would report a value above 100% in certain scenarios.
- When exporting data using the More > Export to CSV option in Estimates, incorrect values were being exported.
- The delay value set in the Allocation & Forecasting screen was not followed when the current task was a milestone and dependent on another task.
- Errors would occur when making payments on a long list of invoices belonging to a single client.
- When selecting a parent project to make a payment, a user was unable to see all the open invoices in the Payments screen.
- Updated report templates.
- Updated help file and documentation.
- Several other enhancements and fixes were made.

VERSION 1.1.131 RELEASED ON NOVEMBER 03, 2018

What's new in this version?

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

- Added the much requested "Tax Tracking" report. This report lists taxes paid, collected and owed for each project.
- Added search feature in "Create from existing budget" dialog in Budget screen.
- Users now have the ability to clone a To-Do from the To-Do list under productivity tools.
- Aging reports can now be grouped by originator, principal and project manager attributes of a project.
- Added Time-off column to benefit usage list view in Employee.
- Company Tax ID now uses a default mask of 'XX-XXXXXXX' for US companies.
- Added enable/disable 'Conflict checking' option in Gantt Chart screen.
- Users can now add multiple deposits and fund transfers using the 'Save & Add New' button.
- Users can now preview attachments directly from the reviewer screen.

Other fixes:

- Allocation and Forecasting screen would incorrectly consider the accounting "Closing Date" of the company while making and updating task allocations. This was corrected.
- Cloud Feeds balance column was not updating the balance column upon refresh. This was fixed.
- Cloud feeds refresh would fail in scenarios where the user had connected non-monetary accounts like rewards. This was corrected.
- AP aging report would not reflect the credits used to pay vendor bills and show them as unpaid. This was fixed.
- When using currency "Smart Fields", currency fields were not properly formatted. This was fixed
- 'Retainer Invoice' would show incorrect client contact details under some scenarios. This was fixed.
- The 'Time Card Week View' report would display data in incorrect week order for some users. This was fixed.
- Phased Invoices for recurring contract type projects would incorrectly include time and expense details along with the recurring amount. This was corrected.
- 'Percentage Billed' report would show a different contract balance when compared to the project structure screen. This was corrected.
- Chart of Accounts screen would fail to retrieve all the sub-accounts upon list scroll. This was corrected.

- Notifications related to Invoices submittal or approval would at times fail to generate. This was fixed.
- Duplicate Vendor bills would appear in 'Bill Payments' screen under some rare scenarios. It was fixed.
- Journal report would not consider purchase tax against a credit card entry. This was corrected.
- Added the ability to sort 'find match' list of 'Cloud Feeds' screen.
- Added new security setting 'Show Salary Amount' to control access to salary amount field in Employee screen.
- Users with time and expense only subscription would fail to access the 'Employee Half Monthly Time Card 'report. This was fixed.
- Items automatically reconciled by bank feed were not being flagged as cleared. This was corrected.
- Statement of Cash Flows report would incorrectly include General Journal entry. This was corrected.
- When selecting all invoices to show up on Statement reports, fully paid invoices would not show up. This was fixed
- Updated reports for performance and bug fixes.
- Updated documentation.
- Numerous other bug fixes and optimizations.

VERSION 1.1.130 RELEASED ON OCTOBER 20, 2018

What's new in this version?

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

- Added the much requested, "Statement by Client (Accountant)" report that can be shared with clients with a listing of unpaid invoices and tear off section to remit payments.
- Added the ability to show or hide the Invoice Number column in the Time and Expense Entry screens.
- Added grand total to the amount column in the Payment screen.
- The default duration for a new calendar event has been changed to one hour.
- Added Date, Submittal Type and Project "Group By" report options to the Workflow Detail report.
- The connection history list in integrations area can now be sorted by date.
- The integrations area was refreshed with new design to comply with third party integration guidelines.

Other fixes:

- Sending tax invoices to Xero would create double tax invoices in Xero in certain scenarios. This was fixed.
- The ID column in the Create from Existing Estimate screen would not accommodate long estimate names. This was corrected.
- In certain scenarios, exporting an invoice to PDF would add an extra item, unit and amount column headers. This was fixed.
- Manual invoices would create duplicate values in the Activity Performance Widget in some scenarios. This was fixed.
- Projects with the "Prevent time entry for the project" project rule enabled, would not show up in the Add Checks>Project column dropdown list. This was fixed.
- Exporting invoice records from the Invoices screen to CSV now includes Client column data.
- Top N Expenses report would show incorrect report title in certain situations.
- Used Percentage column would incorrectly round below .5% usage to 0%. This was fixed.
- In certain scenarios, the Auto Apply feature in the Payment screen would not work when editing a payment for 2 or more invoices.
- When creating a Retainer Invoice with no due date, it did not display 'due upon receipt' under terms. This was fixed.
- Deleting or voiding a NSF payment would create a negative invoice balance in certain scenarios. This was fixed.
- Vendor screen filters were not being obeyed when previewing on-screen reports. This was fixed.
- Summary total failed to update when adding a new allocation value in Allocation & Forecasting-Forecasting>Manual View. This was fixed.
- Purchase Order screen filtered by vendor did not get applied to the "Purchase Order Time and Expense Details" report. This was fixed.
- Column headers would not display as you scroll down the Security Profiles screen. This was fixed.
- Group filters applied to Client, Employee and Project screens were not applied when running on-screen reports. This was fixed.
- Journal report would show General Journal detail as negative debit value instead of a credit value in some scenarios. This was fixed.
- Clicking yes to "Invoice includes vendor bill(s) would you like to review" Payment screen message would redirect to the Bill Payment screen. This was fixed.
- In a scenario where 'Project ID - Name' or 'Name-Project ID' value was more than 15 characters, the forecasting screen was unable to display all of its columns. This was fixed.
- The Status filter in the Submittal and Drawing screens was not being applied when running their respective on-screen reports.

- Start and end date filters in the Benefit List screen were not being applied when running HR Benefit List on-screen report. This was fixed.
- Time and Expense on-screen report did not use Vendor group filter in the Reviewer screen. This was fixed.
- Spent column of Project contract status incorrectly included unapproved time and expense. This was fixed.
- Line item total in LEDES 1998B file did not include expense entry markup. This was fixed.
- Incorrect data issue when using a Client date type custom field when mapping the LEDES 1998B CLIENT_MATTER_ID. This was fixed.
- Journal report would show incorrect debits and credits for Credit card refunds and credits. This was fixed.
- Journal report was not correctly handling an invoice that had negative expense. This was corrected.
- An unintended "[]" line terminator would show on every invoice line item when exporting a LEDES 1998B file. This was fixed.
- "To Do" widget did not display vendor records in the "Assigned to" filter drop-down list. This was fixed.
- Getting QuickBooks Online "Projects" to Core and sending phases created under these projects to QuickBooks Online would error out. This was fixed.
- Statement reports would incorrectly show all invoices instead of open invoices only. This was fixed.
- Work In Hand report now sorts the Group by option alphabetically.
- Getting MYOB AccountRight Project that had "Project Manager" Display As values that were not linked with a Core employee record, would create additional employee records. This was fixed.
- Updated reports for performance and bug fixes.
- Updated documentation.
- Numerous other bug fixes and optimizations.

VERSION 1.1.129 RELEASED ON OCTOBER 06, 2018

What's new in this version?

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

- Added a new report to track benefit usage. The report calculates earned, used and remaining benefits for employees.
- The 'AP Reconciliation' report would not include un-cleared transactions. This was fixed.
- An issue in the project structure view would in-correctly set the project contract amount to 0. This was fixed.
- Certain Canadian customers would receive errors when scheduling a report. This was fixed.
- Project List screen would not remember sort order when refreshing the screen. This was fixed.
- Creating a new project structure using templates would not copy project assignments for the new structure. This was fixed.
- 'Overdue Invoices' report was updated to display the name of projects on when showing a joint invoice records.
- The statement report would not obey the name that was set in the Global Setting screen using smart fields. This was fixed.
- Fixed certain scenarios when Time Entry, Expense Entry and PTO Request Records would have a default to yesterday's date instead of current date. This was corrected.
- Resolved accounting mismatch on the Journal report for checks having positive and negative check line entries.
- LEDES export now allows to associate either Client Id or Matter ID to client matter.
- 'Monthly Billing Statement' report was fixed to not include retainer amounts applied during invoice creation.
- 'Statement of Cash Flows' report would not obey the period 'Last week' filter. This was fixed.
- Fixed an issue where cancelling a 'create project from template' action would still create the project structure.
- Fixed issue where batch updating the invoice date would not update the underlying transaction date. This was fixed.
- A certain bug would not allow statements to preview. This was fixed.
- The 'Budget Comparison by Employee' report would incorrectly show 'Employee Name' instead of 'Employee Title' when viewed by title. This was corrected.
- Updated Allocation and Forecasting report to display non-allocation 'Other Tasks' as a positive number instead of a negative one.
- Custom Invoice template would not preview in Invoice Collections screen. This was fixed

- Under some certain scenarios, un-cleared unreconciled transactions would show as cleared in Accounts Reconciliation screen.
- A user with billing subscription but missing Manager Subscription was not able to filter invoices for projects. This was corrected.
- Creating a report scheduling record would require at least one filter. This was corrected
- Updated reports for performance and bug fixes.
- Numerous other bug fixes and optimizations.

VERSION 1.1.128.0 RELEASED ON SEPTEMBER 14, 2018

What's new in this version?

Introducing Core HR beta! Core now offers powerful HR management features such as:
- Benefits assignment and usage
- Salary change and history

Core's HR feature gives managers the ability to track and regulate employee benefits, salary reviews and much more.

We value your feedback, so if you have something to share then email us at corehr.feedback@bqe.com

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

- Project Managers can now preview an invoice from the Project Transactions tab.
- The pending transaction state of cloud feeds would cause the feeds to duplicate in Core. It was corrected.
- The 'Law Firm ID' and 'Invoice Description' fields were not getting populated on the LEDES export file. This was corrected.
- 'Law Firm Matter ID' field was incorrectly considering the Global Settings >LEDES->Client ID and Project ID mapping settings. This is now mapped to the Project ID field.
- 'Info Bar' of the Personal Time Off Requests screen would not default to the current YTD range. This was corrected.
- Added various 'Transaction Type' filters to the 'General Ledger' report.

- There was a data mismatch between 'General Ledger' and 'General Ledger Extended' reports in certain user company scenarios
- Added period filter 'Last Two Weeks' in the Reports screen.
- The initial load performance for "Time and Expense" report was optimized for large data files.
- In certain scenarios, the user preference setting 'Auto-fill Time Card with the last x projects/activities' would not display all time entries an end user entered in the Time Card. This was fixed.
- The 'Contract Employee' filter is now added to the 'Project Performance' report.
- Core would incorrectly change Workflow Status from 'Submitted' to 'Forward' or 'Forward' to 'Submitted' when submitting a time entry multiple times.
- The 'Client Transaction' report displayed no data when using 'All Dates' or 'As Of' date filters.
- The 'Trial Balance Accrual' report would create duplicate entries when exporting to CSV file.
- Formatting issues occurred when emailing or printing certain statement reports using reports options. These issues were found in the 'Reports' and 'Statements' screens.
- Invoice Date would not default to the current date for our Australian region users. This would happen when creating invoices in both Create Batch Invoice and Manual Invoice screens. This was fixed.
- The 'Percentage Billed' report showed incorrect 'Contract Bal' and '% Billed' column data in certain scenarios. This was corrected.
- 'Credit' and 'Write off' payment types were not being sent to Xero during data integration. This was fixed.
- When creating a new budget from an existing budget, the 'Create from Existing Budget' screen would not allow sorting. This was fixed.
- Renamed 'Project Allocation Units Spent Forecast' report to 'Project Allocation Units Spent Distributive Forecast' and 'Project Allocation Earned Revenue Distributive Forecast' report added.
- Added 'Manager' field to the Batch Update screen in 'Projects'.
- Updated reports for performance and bug fixes.
- Numerous other bug fixes and optimizations.

VERSION 1.1.127 RELEASED ON SEPTEMBER 01, 2018

What's new in this version?

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

- 'General Ledger' report load performance optimized for large data files.
- Joint invoices would sometimes incorrectly round tax amounts.
- Scheduled 'Time Card Week View' report would not obey filters.
- 'Bill Payment Credits Available' and 'Total Credits Used' columns would not update when using the credits in the 'Create Bill Payments' screen.
- Performing any actions in 'Expense Details' tab and then undoing these actions would cause the 'Invoices' screen to freeze. This was fixed.
- 'Fixed Fee – Accounting' invoice templates would display HTML markup text instead of actual text on the Invoice field.
- Certain ArchiOffice migrated company files would get duplicate invoices.
- Core project names with colons sent to MYOB projects would have incorrect project name values.
- Core would not remember 'Show Entry Details' setting when enabled for the end user in the Time Card screen.
- In certain cases, having the Time Entries and Invoices screens open in two separate browser tabs would incorrectly show time entries as billed (status). This would happen when deleting an invoice and updating "billed" time entries in the Time Entries screen.
- Parent project name having apostrophe would sometimes not show its phases in the 'Create Batch Invoice' screen when using the Filter by > Project > Individual Items.
- 'Project Contract Status' report would not obey Project Status filter.
- 'Work in Progress Details' report did not show the correct project manager in the Project field.
- 'Automatically assign this template to corresponding project' option in Choose Template dialog in Invoices screen was not working.
- In the Allocated Hours report, the 'Assigned Hours' and 'Consumed Hours' columns would show incorrect data in some cases.
- Added tool-tip to the Class field in the Edit Check screen.
- In the 'Statement of Cash Flows' report, the 'Net Income' field did not reconcile with the Profit & Loss report.
- Added search capability to the 'Email Recipients' drop-down list when scheduling reports.
- 'AP Reconciliation Discrepancies' report would not obey the 'Accounts' filter.
- Invoices would disappear in the 'Invoice Collections' screen when showing 'Closed' invoices and changing the 'Period' filter.
- 'Vendor Bill List' report would incorrectly show client hours instead of actual hours.

- Batch Update would cause billing contacts to be removed in some cases in project screen. This was fixed.
- Xero duplicate invoices were being created in certain scenarios when sending joint invoices and then sending payments on joint invoices to Xero.
- When the user had a lot of bills to pay in the 'Create Bill Payment' screen, sorting by Payee caused 'Page Unresponsive' errors. Also, the 'Print Checks' screen became unusable. This was optimized.
- 'General Ledger', 'General Ledger Extended' & 'Trial Balance' reports did not display 'Cash Type' journal entries.
- Projects with type 'main' look visually distinct now (greyed out and bold) in the 'Payments', 'Invoices' and 'Create Batch Invoice' screens.
- 'Firm Reconciliation' report would not show data when using the 'Invoice Date' filter.
- Billing a 'Fixed' contract type project to 100% that also has extra time entry amount did not add the extra amount to the invoice created. Only the 100% contract amount got billed. This was fixed.
- 'Personal Time Off Requests' screen 'Info Bar' would not obey the 'Submitted', 'Rejected' and 'Approved' filters.
- Applying an 'Interest Charge' in the Account Reconciliations screen would not let user reconcile the account.
- Users could not delete project structures because certain phases with 'Hold' project status would not show up in the Project list. This was fixed.
- Allocation reports now obey the 'First day of the week' global setting.
- Removed duplicate 'Is Active' filter for the 'Purchase Order Invoice' report.
- Few customers were not able to add Google Drive as cloud storage destination. This was fixed
- Bug fixes and stability improvements.

VERSION 1.1.126 RELEASED ON AUGUST 18, 2018

What's new in this version?

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

- Added new security setting to control access to bill and cost rate column in Fee Schedule screen.
- The Invoice Collections screen now allows you to view the 'Workflow History' along with other transaction details.
- Sending Vendor Bills to QuickBooks would skip if there were no project associations. We have improved sync error handling and logging; the log file now says which projects failed during the sync.

- Added 'Contract Type' filter to all time and expense reports.
- The period filter 'Last Month' would incorrectly display dates on the reports. This was corrected.
- For Check Details report, the 'Check Number' filter drop-down would incorrectly show 'To Be Printed'. This was corrected.
- 'Message on Invoice' field with long text would not display properly on Clients screen.
- Creating a new project from a template with phases would not copy the phase structure project name from the template to the new project structure. This was fixed.
- Revised Name and Description of many Core invoice templates.
- Users were unable to apply any filter in the Statements screen. This was fixed.
- Added 'Check Number' filter to the 'Expense Details' report.
- Adding a new allocation in the 'Allocation & Forecasting' screen using the keyboard would throw an error. This was fixed.
- Client contact details like 'Email' and 'Phone' would not show up in the 'Invoice Collections' list view. This was fixed.
- Core® would fail to import a large number of invoices from Xero®. This was fixed.
- 'Company YTD Comparison' report would not respect the Fiscal Year dates for both previous and current year. This was fixed.
- 'Project Performance' widget on the Dashboard would allow everyone to see the projects even though their security setting 'Allow Access to other Managers Data' prevented it. This was fixed.
- Under some rare conditions, editing a Purchase Order line item would sometimes duplicate the 'Line Number' of the entry. This was fixed.
- The text under 'Class' dropdown list would appear truncated in 'Edit Check' screen. This was fixed.
- 'Balance Due' field in Invoices would sometimes display the incorrect amount due to rounding issue. It is corrected now.
- Using the From-To range filters would not send records to QuickBooks. This is fixed now.
- Sending retainer payments created in Core to MYOB would fail. This was fixed.
- Syncing joint invoices from Core to Xero would remain unlinked in Core and get duplicated in Xero. This was fixed.
- After getting MYOB Vendor Bills of Service and Professional types into Core, if you re-sync them to MYOB, instead of overwriting, it would create duplicates in MYOB. This was fixed.
- Accounts Payable report in the Registers screen would not respect Net Terms set in Vendor Bills. It would always show Term Net 30. This was fixed.
- 'Purchase Order Time and Expense Details' report would not respect the screen filter 'Due Date' and 'Workflow Status' filters. This was fixed.
- Duplicate entries showed up when there were more than 25 checks in the Recurring Checks screen. This was fixed.

- 'Client Retainer Summary' report would not display correct Retainer Used totals when using client and project retainers. This was fixed.
- 'General Ledger' report did not display corresponding transactions when using the Time Entry Date filter. This was fixed.
- When trying to update the Payee of a check through the Bank Account register, it did not update. This could be seen when editing the same check in the Edit Check screen. This was fixed.
- With the LEDES setting 'Send item level sales tax as a separate line item', tax amount was displayed twice on the export file. This was fixed.
- Changing the 'State' custom label would incorrectly apply the change to the screens and reports. This was fixed.
- Project Retainer Available would not get displayed when creating payment via the Project drop-down option. This was fixed.
- Selecting multiple draft invoices and exporting to LEDES 1998B format would display the same invoice number for all the records in the export file. Also, there was no way to differentiate between finalized and draft invoices when using LEDES 1998B format. This was fixed.
- Changing project's A/R account including existing invoices and payments did not change the Payment's A/R account. This was fixed.
- 'Send attachments as single file' setting would incorrectly include the invoice PDF file inside the zipped folder. Invoice pdf file should be separate from the zip file. This was fixed.
- Updated reports for performance and bug fixes.
- Numerous other bug fixes and optimizations.

VERSION 1.1.125 RELEASED ON AUGUST 04, 2018

What's new in this version?

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

- Users with privileged access can now manage timers for all users in the timer list view.
- Added new security setting to control access to bill and cost rate column in budgets and estimates.
- Employee missing time report was improved to only show employees that have not met the required daily hours specified for them in the Employee screen. The report also looks at the work days specified in the global settings to determine which employees are missing time for the specified week.

- Export to Excel feature for reports received a major overhaul to handle numeric and currency fields. Users can now use the excel output to create summary columns or add their own formulae. This update applies this fix to selected reports like Contract Analysis, Account Transactions and all PL reports.
- This update adds a critical fix to a persistent issue which forced some of the users to clear their local cache immediately after an update.
- Project structure tab in Project detail view was not able to correctly roll up spent and other amounts for a project structure that had main projects at a hierarchical level other than the top. This was fixed.
- Scheduled tab in the reports area was not respecting custom labels. This was fixed.
- Time expense reviewer would show duplicate rows after a sort was performed and the user would scroll to retrieve another page of results. This was corrected.
- Memorizing a vendor bill with multiple accounts line items would duplicate the line items when processed. This was fixed.
- A rare scenario in the time card would cause duplicate time entries being saved. This was fixed.
- PTO InfoBar would incorrectly show zero values when submittal filters were applied to the list. This was fixed.
- Overtime calculator would repeat time entries on progressive scroll of the list if no sort option was provide by the user. This was fixed.
- Time and expense by parent project reports would not respect any filters provided by the user. This was fixed.
- Screen reports in the reviewer screen did not respect the class filters. This was corrected.
- Screen reports in the Credit memo screen did not respect any filters. This was corrected.
- "Run Schedule" option for schedule reports would incorrectly zip the report pdf if the global setting, "Automatically zip multiple attachments" was checked. This was fixed.
- Updated reports for performance and bug fixes.
- Numerous other bug fixes and optimizations.

VERSION 1.1.124 RELEASED ON JULY 20, 2018

What's new in this version?

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

- Dashboard widgets now allow users to specify custom date ranges.
- Time and expense entry screens now prefill the date field with the today's date while creating a new entry.

- This update implements an API engine enhancement that mitigates most issues related to concurrent record update scenarios.
- Workflow accordion was added to Invoices, Vendor bills and Purchase orders.
- Added Project Manager Column to Invoice list view.
- Added the much requested "Missing Time" report to allow managers to actively monitor time card completion.
- Funds transfer screen would limit the user to 25 records only. This was corrected.
- Batch update of "Automatic overtime" field in Employee list view now allows to turn off this setting for one or more users.
- Implemented wild card based search in assign screen of groups.
- Account reconciliation screen would omit transactions of type "credit card credit". This was corrected.
- Work flow details report was enhanced to provide users with detailed log of submit/approve history.
- Implemented a real time progress indicator for Xero sync.
- Xero integration sync settings would not obey the filters specified by the user. This was fixed.
- Xero integration would fail to retrieve all the records from the corresponding Xero module and restrict the sync to just 100 records. This was fixed
- Project template edit view would not allow users to choose a custom invoice template. This was corrected.
- Time entries send to QuickBooks were not being correctly calculated into hours in HH:MM format. This was corrected.
- Payment list view would not load all historical payments when the list was filtered by a custom date range. This was corrected.
- Batch update of "Message on Invoice" for selected projects would restrict users to message of certain length. This was fixed.
- Activity list view would fail to retrieve all records if a batch update was performed. This was fixed.
- An issue in the invited user on-boarding was preventing users from signing in after accepting the invite. This was fixed.
- Completed projects were appearing in create new recurring invoice screen. This was fixed.
- Top 10 revenue report would display duplicate filters. This was corrected.
- Classification dropdown was missing the ability to sort. This was fixed.
- Updating a project for an existing entry in Time card would not use the correct rates and classification, if the project had a fee schedule or an assignment. This was fixed.
- Updated reports for performance and bug fixes.
- Numerous other bug fixes and optimizations.

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VERSION 1.1.123 RELEASED ON JULY 6, 2018

What's new in this version?

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

- Time card screen now allows users to view submittal status of an entry using specific icons.
- Record mapping section added to Core-Xero Account integration module.
- Added two new Manual invoice templates:
  - With tax and percent complete
  - With Contract Summary
- Added the ability to quick search, apply filters and sort the various columns in Deposit detail view.
- Added descriptive legends in some specific reports that elaborate on the formulae used to calculate certain amount fields. e.g. Billing Analysis, Earned Value etc.
- Certain project rules were not being applied to the parent project when using batch change. This was corrected.
- Exporting a large list of vendor bills for CSV export would fail for certain users. This feature was optimized for performance,
- Project detail view would show the Project name in the bread crumb instead of the display as. This was corrected.
- Creating a new fee schedule from an existing schedule would not show the fee schedule list in any order. This was corrected.
- Core transactions shown in the vendor, transactions tab were being limited to 25 records. This was corrected.
- Retainer transaction shown in the Client, transactions tab were being limited to 25 records. This was corrected.
- Certain invoice templates did not respect the Project display as settings specified in the global settings. This was corrected.
- Added the ability to attach multiple documents in the report viewer.
- Added Project Performance and Firm reconciliation report to billing and manager subscriptions.
- Security permission screen would also show inactive employees. This was corrected.
- A certain scenario involving mid-way rounding was causing issues in the charge amount field of expense log. This was corrected.
- Filter dropdowns would not follow the recently introduced sort order feature in memorized, favorite and scheduled reports tab. This was fixed.
- Timer icons in the utility bar would indicate an incorrect badge number in certain scenarios. This was corrected.
- Creating a new project or projects based on project template with hierarchy would not inherit the correct project or phase name. This was corrected.
- A certain scenario would cause the cloud feeds, find match to not function as expected. This was fixed

- Added a switch to control if details should show up for group reports.
- Updated reports for performance and bug fixes.
- Updated help content.
- Numerous other bug fixes and optimizations.

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.

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)

What's new in this version?

- 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)

What's new in this version?

- 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 in this version?

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.

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.

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 exampling 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 un-necessary 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.

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.

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.

Other fixes:

- 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.

Other fixes:

- 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 where 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 underling 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.

Other fixes:

- 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.

VERSION 1.1.13 RELEASED ON SEPTEMBER 3, 2017

What's new in this version?

- Smart fields for Email Settings: Users can now set up company or user level email subject and message fields to use smart placeholders that are replaced with actual values while emailing invoice, reports, statements and payment receipts.
- 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.

- 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.
- 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.

Other fixes:

- 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 coped 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

What's new in this version?

- 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