

# BillQuick 2004

By Bob Wolff



Designed for engineering and architectural firms, BillQuick 2004 delivers time tracking, project management and billing modules that serve small to large firms. It supports professionals working from a PC, on a network and via the web. You can exchange data via email, hand-held computer and cell phones from the field. Collectively and individually, BillQuick and its add-on modules allow a firm to choose and customize capabilities that meet client and firm requirements.

The core of BillQuick is the Project Profile. In addition to standard elements like project name and address, project manager, start/end dates, phases, custom fields and percent complete, BillQuick also supports contract types (fixed, hourly, hourly not to exceed, percentage, recurring, etc.) and a project contract amount. A different firm-wide invoice format can be associated with each contract type. Invoice formats can also be project-specific. More than 60 invoice formats are included with BillQuick, and like reports and statements, invoice templates are created with Crystal Reports 9.x.

Bill and cost rates include traditional employee rates and activity or task rates, and a Service Fee Schedule (SFS) for project-specific rates. SFS rates apply to tasks or groups of tasks performed by one or a group of employees. For example, Level 1 Engineers working on Project 04-154 may be billed at \$85 per hour (as specified in the project contract) regardless of the default employee bill rate. Or, you may choose to bill a high-fee engineer at a lower rate when performing administrative tasks such as blueprinting. BillQuick intelligently selects the appropriate rate to compute the billable amount when you record a time entry. A similar schedule is available for expenses and subcontractor fees.

Another powerful capability is project-specific rules. You can, for instance, restrict recording of time and expenses only to employees assigned to the project, restrict activity and expense codes chargeable to a project, and lock an on-hold project against recording of additional time and expenses. Also, you can activate comparison of time and expense entries against a project's contract amount. Over-amount entries are automatically flagged as nonbillable.

BillQuick augments core project capabilities with Resource Allocator (RA), an add-on module. RA tracks schedules and manages resources. Employees and subcontractors may be assigned by skills sets, if desired. After specifying the start date for a task, Resource Allocator determines the earliest finish date & time for a resource, or a group of resources, utilizing both standard and custom calendars.

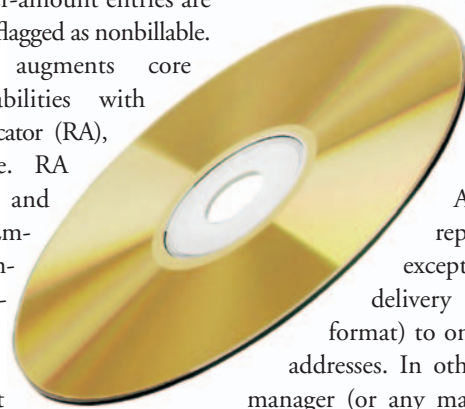
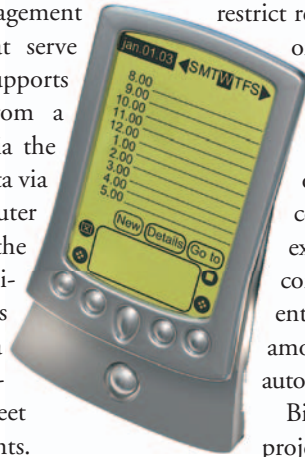
RA's Conflict Checker automatically checks for conflicts in all projects. Employing advanced fuzzy logic, RA allows you to choose alternative resources (e.g. subcontractors), or to re-prioritize a resource's schedule so the person (equipment or facility) is shared among projects.

Project management information is extensive. In addition to Gantt charts

and other reports in RA, BillQuick contains dozens of project reports. Budget versus Actual reports, and other project reports, help managers track project status in summary and in detail (how far over or under budget and the cause). Reports can be printed for a range of clients, projects and start dates, as well as by the assigned project manager.

Another BillQuick add-on module, Agent Pro, saves time by automatically generating any BillQuick report on a desired frequency schedule – daily, weekly, monthly, 10th of the month, every Monday, etc. While Agent Pro can send reports to a printer, its exceptional power is email delivery of reports (PDF format) to one or multiple email addresses. In other words, a project manager (or any manager or staff) can receive reports anywhere – the main office, a remote office, or in the field. Agent Pro also automatically checks for late time cards and automatically emails delinquent employees.

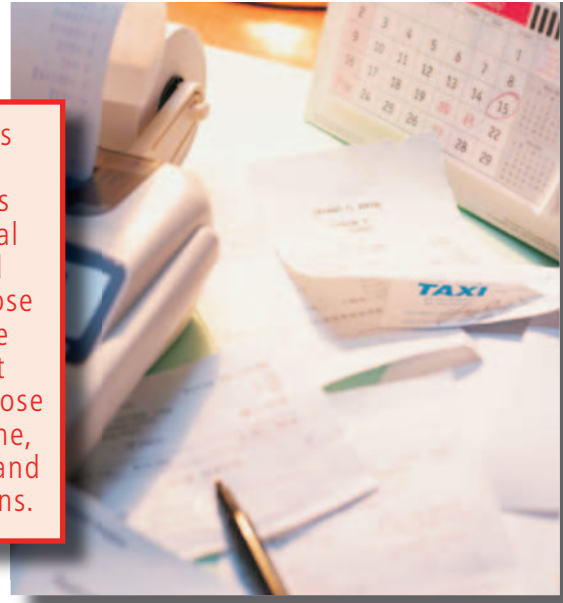
In BillQuick, to progress bill, you can assign a project billing schedule that defines how much and when to generate the bill, how much retainer to apply and what detail to display. Whether T & M, progress, percent complete, recurring or phased billing, BillQuick lets you bill all or selected projects with a few keystrokes, or adjust individual billing details as needed. For example, you can exclude time and expenses from a bill, apply a retainer amount, write-up/down the bill amount, and apply percent-of-completion. BillQuick supports both individual project and joint invoicing. BillQuick supports logos and draft invoices, and can email invoices and archive them as PDFs.





BillQuick supports QuickBooks® integration. Database integration is two-way. Users decide what data to synchronize – clients, projects, time, expenses, invoices and so on. Synchronize BillQuick and QuickBooks – on-demand (manually), on-schedule, or in real-time.■

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**INVOICE**

Invoice Date:	Mar 1, 2004	Invoice Number:	1011
Billing Period:		Start Date:	Feb 01, 2004
		Close Date:	Feb 28, 2004

Project ID: 97-056  
Project Name: Donald Brothers Shopping Mall  
Project Manager: JA  
Contract Type: Fixed  
Contract Amount: \$ 50,000.00  
Amount Billed: \$ 1,000.00

Building Department Approval

Due Now, Progress Payment #: 6 Amount: \$1,000.00

**Reimbursable Expenses:**

2102004 EA	Bio Feasting	\$20.00	
2102004 EA	Federal Expense	\$19.95	
		<b>Total Expenses:</b>	<b>\$39.95</b>
		Contract Applied:	\$500.00
		<b>Amount Due this Invoice:</b>	<b>\$469.95</b>

This invoice is due upon receipt

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