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PRACTICE MANAGEMENT

2010 review of BQE Software Inc. — BillQuick

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www.BillQuick.com

BillQuick is an impressive program for capturing time, creating invoices, and analyzing the firm position and productivity. It is well suited for medium-sized firms that can exploit the extensive analysis features, and for those who have a need to customize invoicing and reporting. And the history of the product and its versioning indicates a steady evolution of the product.

Basic System Functions

BillQuick is available in several industry-specific versions, including versions for accounting professionals, architects & engineers, IT consultants, attorneys, and government contractors. It offers in-depth customization of the user interface, allowing the user to select optional columns to view on data-entry screens and reports.

BillQuick has designed its database and functionality to relate to an engagement and then client hierarchy. Their view is that this architecture is much less susceptible to WIP going unnoticed and unbilled than the typical client-centric approach. This in no way impacts the reporting and billing flexibility, and in fact, according to the vendor, provides a better control of income and expense. The only burden to the firm

is that each client must have at least one engagement created in order to capture time and expense. This seems like a minimal amount of effort compared to the ability to confidently and accurately manage the workflow within the firm. Concurrent users are supported.

Time Tracking Capabilities

BillQuick allows users to directly enter time or use a stopwatch timer, which can be tracked and then imported into the time entry field. This allows users to multitask and capture time in small increments. As well, the stopwatch has been enhanced this year with a new auto-pause feature, where the timer automatically stops after several minutes of inactivity, prompting the user upon return to accept or ignore the inactive time.

Service Fee Schedules is an innovative feature that allows the firm to set up standard rates for clients and timekeepers, and update them globally by grouping them into user-defined sets. Any such fees can then be adjusted as needed for any given billing situation. The product handles multi-staff entry as well as variable fee schedules.

BillQuick 2010 allows users to electronically submit invoices, vendor bills and purchase orders to managers for review and approval. And the product's new PTO management feature allows staff and managers to electronically request, review and approve all personal time off requests.

Management Features

BillQuick offers a very nice customizable dashboard for at-a-glance firm/task management. Detailed analysis of productivity and realization can be produced very quickly, based on any criteria or filter desired. The system can be set to automatically generate either standard or custom reports on a schedule, and email them to the appropriate user. This can be a great way to build habits of timely and accurate time entry, management and billing.

The system administrator also determines which data is visible to any user; if desired, a staff timekeeper can be setup to not show bill rates and costs being charged to a client. These controls apply to any reports that the staff member may have access to. Should the firm choose, there is an option to restrict one or more timekeepers to specific clients or engagements. This can cut down time entry errors and delays.

BillQuick 2010 features a new Allocate screen for scheduling and assigning tasks and hours to staff members, with the added ability to send schedules that integrate with

Outlook in order to populate the recipient's Outlook calendar.

Invoicing Functions

BillQuick comes with more than 120 invoice templates from which to choose, with the option to email or print them. Of particular note is the product's new Memorize Invoices feature, which allows users to schedule a manual or retainer invoice to be processed at set frequencies.

The bill creation, review, customization and approval process is totally manageable with options for just about any scenario. This flexibility includes managing of write ups, write downs, and deferment down to the individual timekeeper and date level. All changes are kept in history and are reflected in any analysis and management reports. Custom text items can be created and saved for later use, and can even be customized for one individual invoice.

BillQuick includes an extensive library of predefined reports, which can be modified and customized to suit just about any conceivable need. Using the powerful and detailed reporting features is key to effective management of firm productivity.

While BillQuick is an on-premise product, it provides a web option that enables staff to enter time and expenses in the field.

Integration & Data Management

BillQuick has excellent integration with several of the most common GL accounting packages, including QuickBooks, Peachtree, Microsoft Office Accounting and MYOB. This integration is bidirectional so that certain changes made within the GL are reflected back into BillQuick. The program also offers integration with Microsoft Office.

Help/Support

The Help button launches on-screen Help and access to the BillQuick website. The comprehensive Help document is presented in a familiar format, and includes the innovative Start-Up Interview, which will step the administrator through the initial setup of the database and master files. Also included are links to the BillQuick support web page, along with downloads. Wizards and pop-up prompts abound, from right-click options to other features that support new users in getting up to speed in exploiting the power and flexibility of the program. Tutorials and training courses are also available.

Summary & Pricing

BillQuick is ideally suited for small to medium-sized firms. A two-user version of the program costs \$495, while a five-user version costs \$1,295.

2010 Overall Rating

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