Run the whole firm from one place. CORE stays the record.

COREboards started as the dashboard over BQE CORE. With the boards, it becomes the place the whole firm does its week: approving time, billing the month, working the pipeline, looking after people and closing the books. Everything you do is written back to CORE, so CORE stays the system of record and nobody has to live in it.

WHY THE BOARDS EXIST

Every role was still opening CORE for the work that mattered

A design firm's week is made of small decisions in different places: approve these hours, raise that invoice, follow up on that proposal, answer that time-off request, record that deposit. In CORE each one lives in its own module, with its own screens, and the people doing them are principals, project managers and a CFO who would rather be doing the work.

The same person also shows up in CORE more than once. A client who is also a vendor has two records, and their phone number and address drift apart.

> **The boards are built around the job, not the module: what needs deciding, who it is about, and the one run you do every month.**

HOW THEY ARE BUILT

Four parts, used the same way everywhere

Queue

What needs deciding

Each board opens on the short list of things waiting on you, each with the button that deals with it.

Profile

Who it is about

Click any client, employee or vendor name and their profile opens beside you: situation, contacts, projects, money and history.

Run

The job you repeat

The monthly billing run, payroll prep, the month-end close: one screen, top to bottom, with CORE updated as you go.

The fourth part is one **Approvals** panel shared by every board, so nothing waiting on you is split across screens. In the sidebar, Opportunities sits under **Planning**, and

Billing, People and Money under **Operations**. Each person sees only the boards their role uses.

WHO GETS WHAT

Built for the roles that run the firm

Everyone	**Approvals** (anything CORE routes to you), **Directory** and every profile, and **Expenses** on the Time Card.
Principals	**Billing**, **Opportunities** and **Money**, plus every person's record through the Directory.
CFO	**Billing** and **Money**, including sign-off on the month-end close.
Studio leaders	**People**: time off, reviews, the roster and payroll prep.
Project managers	The billing sheet on each of their projects, drafting invoices and routing them for approval.
Firm admins	Every board, and the power to grant any board to anyone in Settings → Users & Access.

FOR EVERYONE

Approvals, the Directory and profiles

Approvals

Time, expenses, time off and draft invoices that CORE routes to you, in one panel. Each item is flagged when something needs a second look: overtime, hours over the plan, a missing memo or receipt, time off that clashes with a milestone. **Review** opens a person's week day by day; approve it in one click, or tick entries and approve or reject them with a note that goes back to the person.

Directory and profiles

One record per person, whether they are a client, an employee, a vendor or all three, each linked to the CORE record behind it. Change a phone, email or address once and it is written to every CORE record behind that person. An employee's profile opens on their utilization, hours and planned weeks, and its Details tab edits their CORE record.

Expenses on the Time Card

A third view on the Time Card, beside Grid and Calendar. Pick an item the project allows, let a mileage rate do the arithmetic, attach the receipt, and submit it with the week's time.

BILLING · FOR PRINCIPALS, THE CFO AND PROJECT MANAGERS

The monthly invoicing run, one project at a time

Billing lists every project with something to bill: unbilled work, earned but unbilled fee, a billing-schedule amount due, or an open draft. Open a project and its sheet shows the whole project and every phase, with fee, billed to date, unbilled, percent complete and this invoice's amount, beside a live preview of the invoice. Beside the run, **Invoices** shows what the firm is owed and how late, and **Payments** lists every client payment and whether it has been deposited.

1. **Fill the invoice.**
   Each phase suggests an amount from what was earned, what is unbilled, or the billing schedule, and never more than the fee left. **Fill** does every fixed-fee phase at once.
2. **Look behind any number.**
   Open the time and expenses behind a phase, hold an entry for next month, or adjust client hours.
3. **Draft, route, finalize.**
   Save the draft in CORE, route it to the project manager's Approvals, then finalize it. From the list of what needs you on your dashboard, **Draft invoice** opens just that one project.

Where CORE still does it: sending the invoice (so clients keep CORE's online payment), posting to accounting and voiding. Retainers and retainage are not in this release.

OPPORTUNITIES · FOR PRINCIPALS AND BUSINESS DEVELOPMENT

The work you are chasing, from first call to published project

Opportunities gathers the firm's pipeline in one place: CORE CRM opportunities, potential projects from the project wizard for firms without CORE's CRM, and HubSpot deals when HubSpot is connected. The home shows the weighted pipeline, the twelve-month win rate and the follow-ups due, above a queue of what has gone quiet or passed its target date. The pipeline reads as a list, or as columns by stage that you drag a card across to move it.

1. **Work the opportunity.**
   Every field CORE keeps is here and saves as you type. Schedule follow-ups, tick them off, and log calls as notes on the record. **Impact** shows what winning it would do to revenue and capacity, and **Pursuit cost** what chasing it has cost so far.

2. **Estimate it.**
   Start the estimate opens the project wizard with the name, client and value filled in. Price it by phase, as a fixed fee, hourly, or a percentage of the construction budget.

3. **Propose it.**
   Write a proposal builds it section by section: the letter, scope of services, fee by phase, schedule, team, images, and standard sections from your firm's library. It prints as a PDF or Word file on your firm's look, is saved to CORE's proposals, and keeps every version. When the client signs, upload the signed copy.

4. **Win it.**
   Won closes it in CORE, turns the prospect into a client, and takes you to publish the project from the estimate. **Lost** asks why, so the win-loss read means something.

Coming later: RFP and RFQ packages, and sending a proposal from COREboards with open tracking. For now you send it yourself.

ONE FEE MODEL EVERYWHERE

Price the way architects price

On every project's Structure & Fees, and on every estimate, the fee can be held at the level you think in. The project itself can hold the fee, for example 8% of a $2,000,000 construction budget, and its phases split it by percentage or dollars. A group of phases can hold its own share and split it again, and a single phase can be its own percentage. Hourly phases sit on top. CORE receives each phase's fee in dollars, and COREboards remembers how you worked it out.

PEOPLE · FOR STUDIO LEADERS

The person, and what needs deciding about them

People opens on the decisions: time-off requests with the balance left after each, reviews coming due, probation ending, anniversaries, and unapproved time that is holding up payroll. The roster shows the columns you choose, such as manager, tenure, PTO balance, utilization against target and next review, for any period.

- **The record.** Employment, benefits, reviews, a journal and incidents on each employee's profile. Compensation is for firm admins only, hidden by Hide $, and never sent to AI.
- **Reviews.** Start and answer a performance review; answers are written to CORE.

- **Payroll prep.** Laid out like CORE Payroll's Payroll Center: the pay date and cutoff, regular, overtime, holiday, PTO and sick hours per person, approved reimbursable expenses, what still blocks the period, a CSV, and one click into CORE Payroll.
- **Time-off benefits.** Firm admins enroll a person in your CORE time-off benefits and set their start date and starting balance; CORE Payroll accrues from there.

Where CORE Payroll still does it: running payroll. People prepares and checks the period, and you submit it in CORE Payroll.

MONEY · FOR THE CFO AND PRINCIPALS

Cash, what you are owed, what you owe, and the close

Money opens on cash in each bank account, receivable with what is over sixty days, payable, payments waiting to be deposited, and how far this month's close has got. The queue lists bills due, deposits to make and clients who have gone sixty days. The same items on your dashboard open Money in a panel over your day.

- **Vendor bills.** Enter a bill with each line on a project phase; the cost reaches the project in CORE. Edit or delete an open bill.
- **Deposits and credit memos.** Tick the payments that went to the bank together and record one deposit; write a credit against a project's receivable.
- **Payment reminders.** Email a client from COREboards with a statement of account and their invoices attached, under your name.
- **The month-end close.** Eight items, four checked by COREboards from CORE and four ticked by hand, and a sign-off that waits until they are all done.
- **QuickBooks Online.** A firm that keeps its books in QuickBooks can point cash, bills, deposits and credit memos there. Invoices, time and receivable always come from CORE.

Where CORE still does it: paying bills, and applying a credit to an invoice.

GETTING STARTED

Twenty minutes for a firm admin

1. **Check who has each board.**
   Settings → Users & Access. The defaults follow the table above. If your firm has saved its own role settings, new boards reach firm admins only until you tick them for each role.
2. **Set what Approvals should flag.**
   Settings → Attention Thresholds: overtime, amounts that need a second look, how long before an item is late.

3. **Set your payday and time-off allowance.**
   Settings → People & Pay, so payroll prep shows the right pay date and cutoff and balances match your policy.
4. **Choose where Money keeps the books.**
   CORE Accounting, or QuickBooks Online on the Connected apps card.
5. **Make the paper yours.**
   The Invoice Designer sets the look of your invoices and your proposals: logo, accent color, typeface and footer.

WHY IT MATTERS

CORE is complete. The boards make it workable.

ORGANIZED BY MODULE	ORGANIZED BY BOARD
• Each job lives on its own set of CORE screens. • The same person is two or three records that drift apart. • Approvals, invoices and follow-ups wait in separate places. • Month-end is a checklist in someone's head.	• Each role has one or two places to go, opening on what needs them. • One record per person, one profile behind every name. • One Approvals panel for everything waiting on you. • The close is a list with a sign-off, and CORE is updated as you work.

Nothing moves out of your system of record. Every approval, invoice, opportunity and review is written to CORE, and every bill and deposit to CORE Accounting or, if your firm keeps its books there, QuickBooks Online. Your records, your reports and your accountant see exactly what they always did.

Billing and Money are in beta and carry a beta tag in the sidebar; Opportunities and People carry a new tag. If something looks wrong, or something you expected is missing, tell us through **Bugs & Requests** at the bottom of the sidebar; it shapes what we build next. The full reference for each board is in the Help Center.