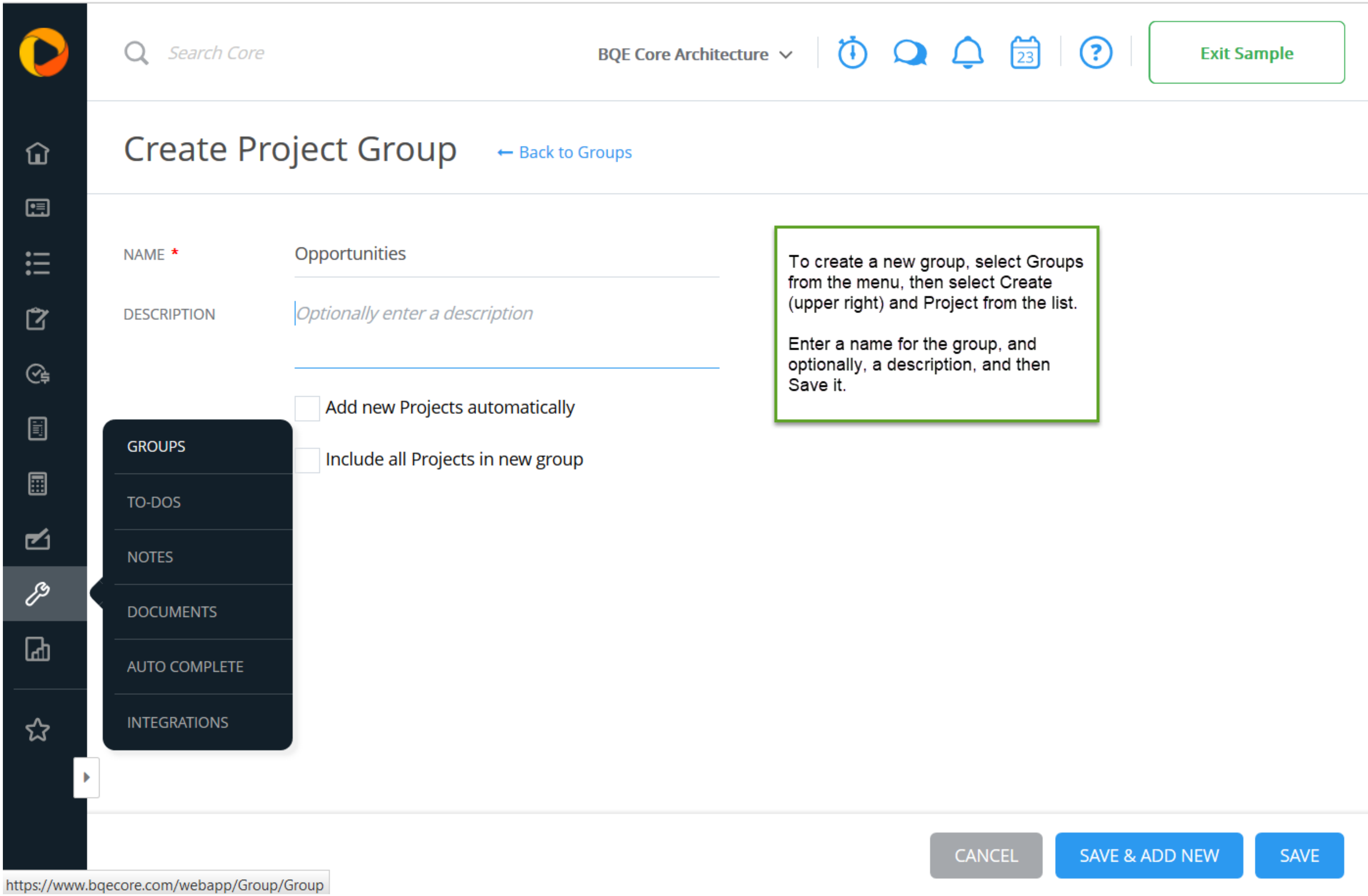
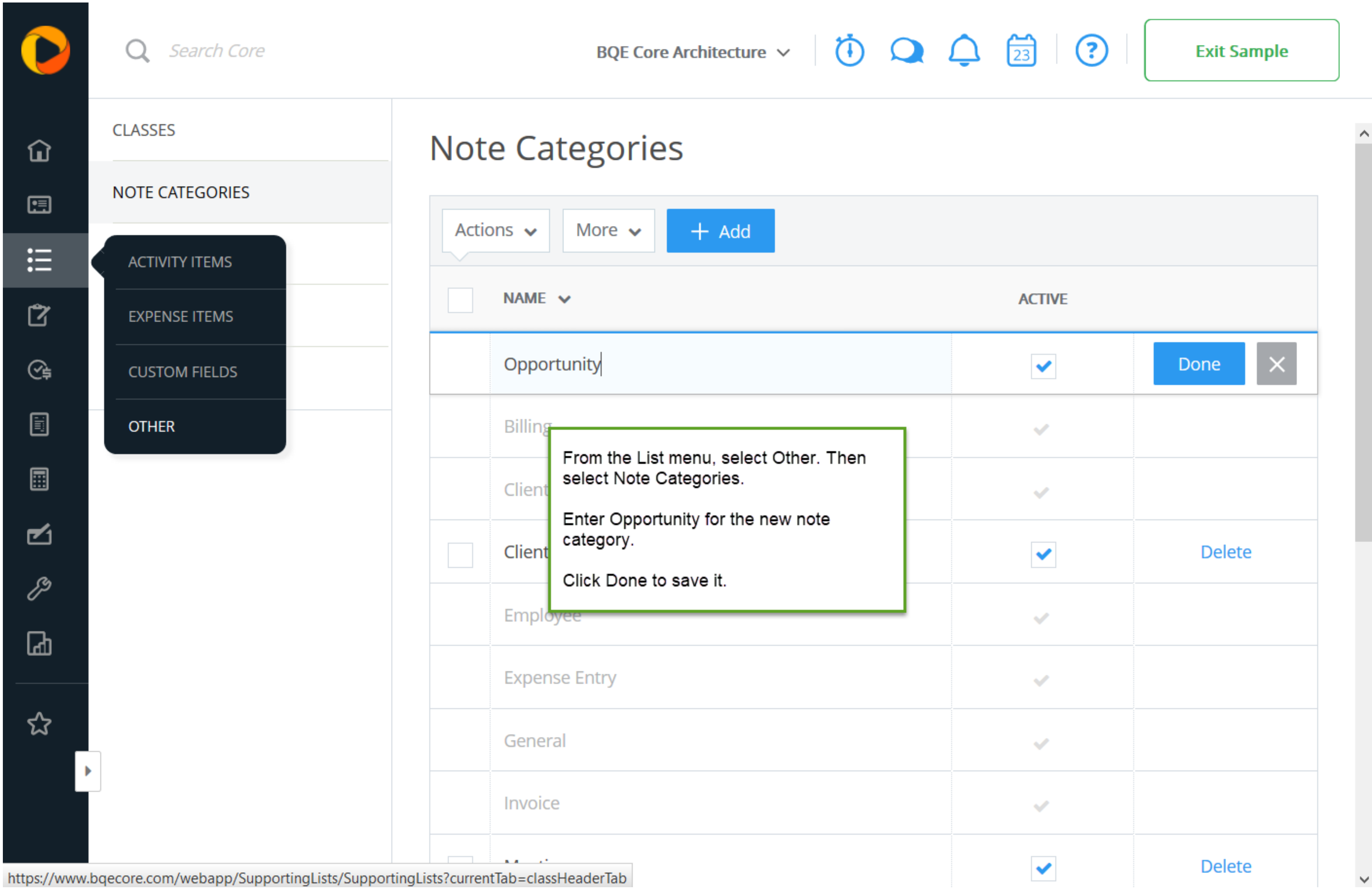
Tracking Opportunities in BQE Core

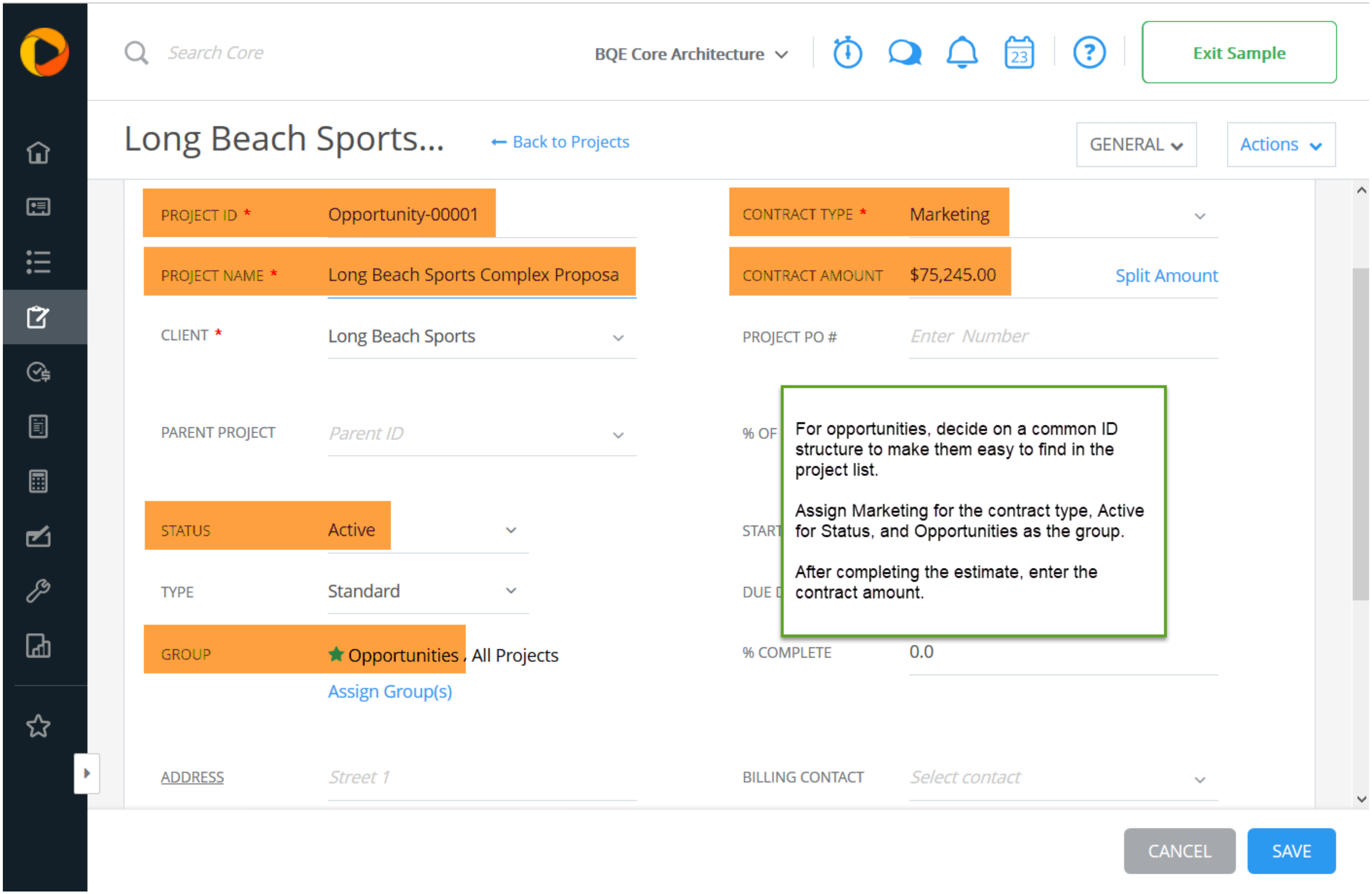
Screenshot Walkthrough

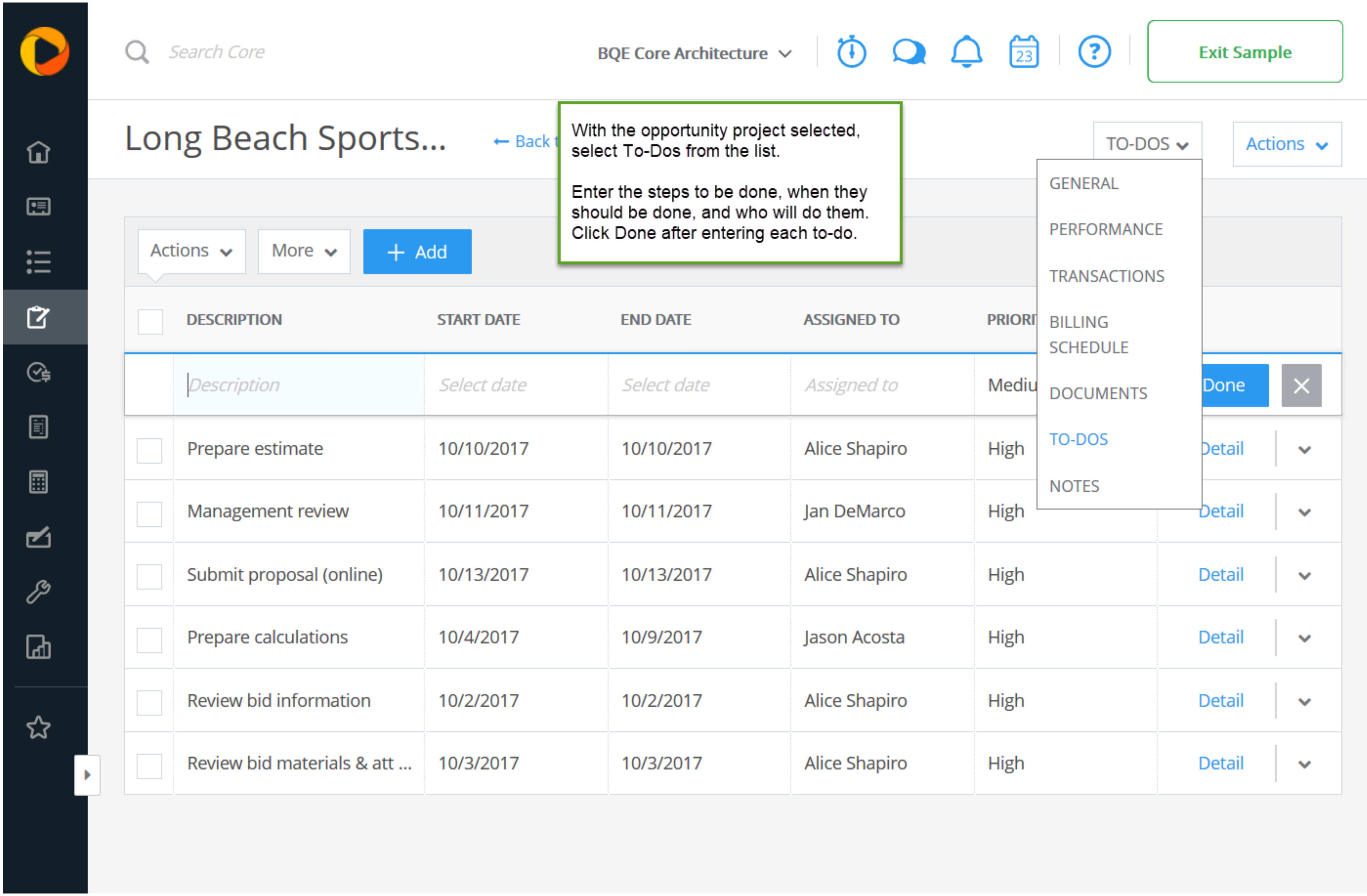


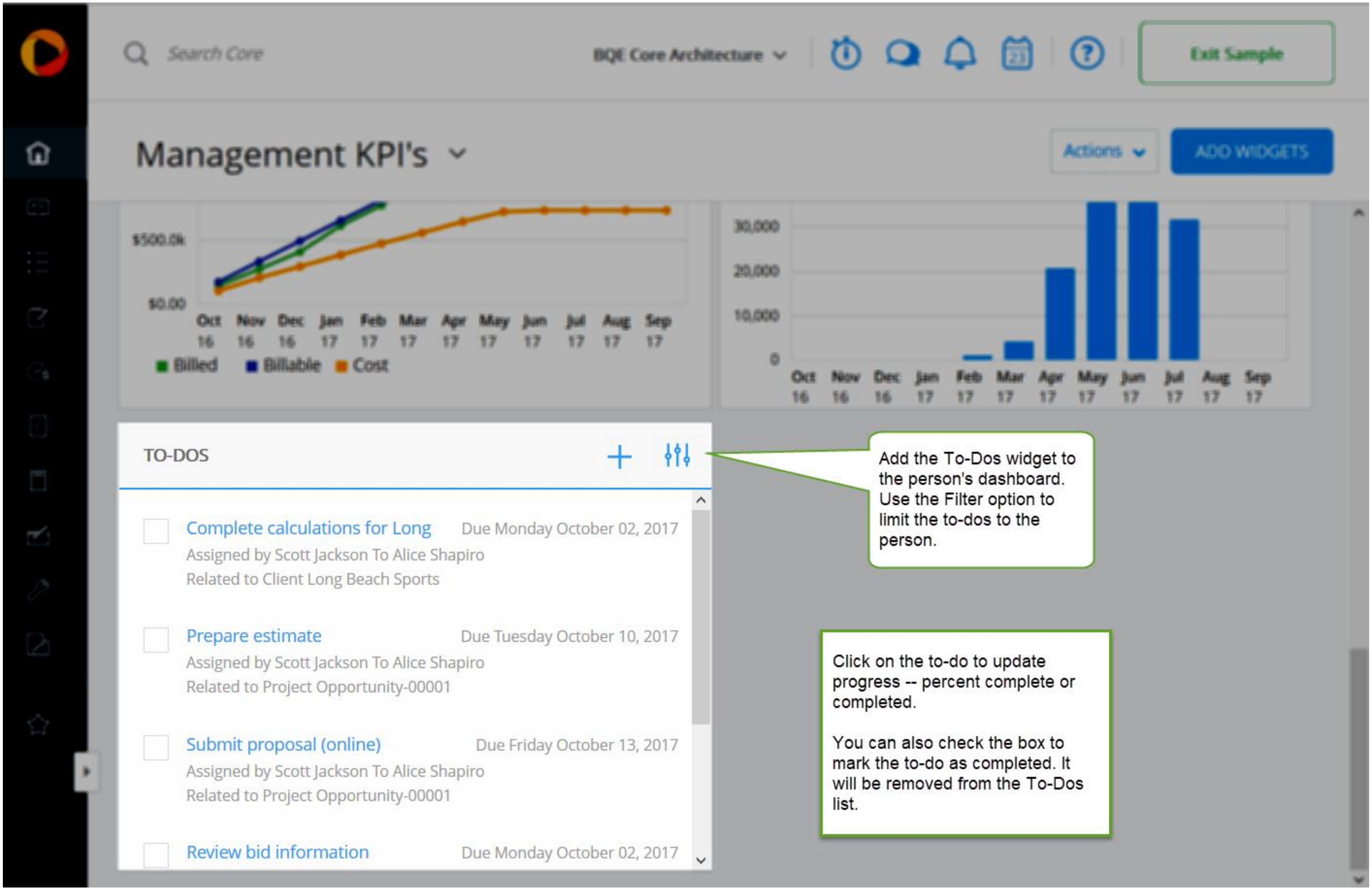
To create a new group, select Groups from the menu, then select Create (upper right) and Project from the list.

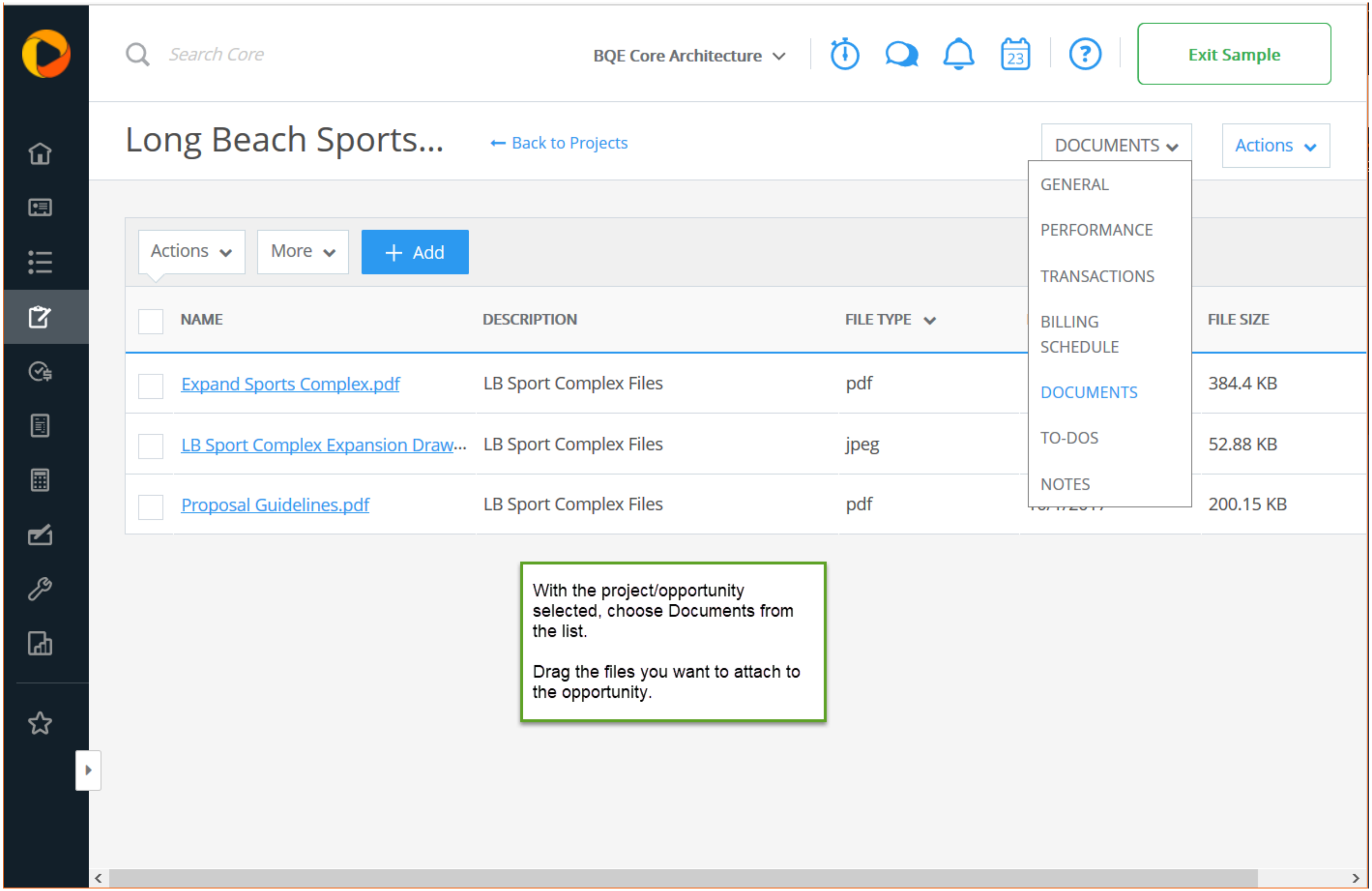
Enter a name for the group, and optionally, a description, and then Save it.


Search Core
BQE Core Architecture
Exit Sample
CLASSES
NOTE CATEGORIES
ACTIVITY ITEMS
EXPENSE ITEMS
CUSTOM FIELDS
OTHER
Note Categories
Actions
More
+ Add
NAME
ACTIVE
Opportunity
Done
Billing
Client
Client
Delete
Employee
Expense Entry
General
Invoice
Delete
From the List menu, select Other. Then select Note Categories.
Enter Opportunity for the new note category.
Click Done to save it.
https://www.bqecore.com/webapp/SupportingLists/SupportingLists?currentTab=classHeaderTab

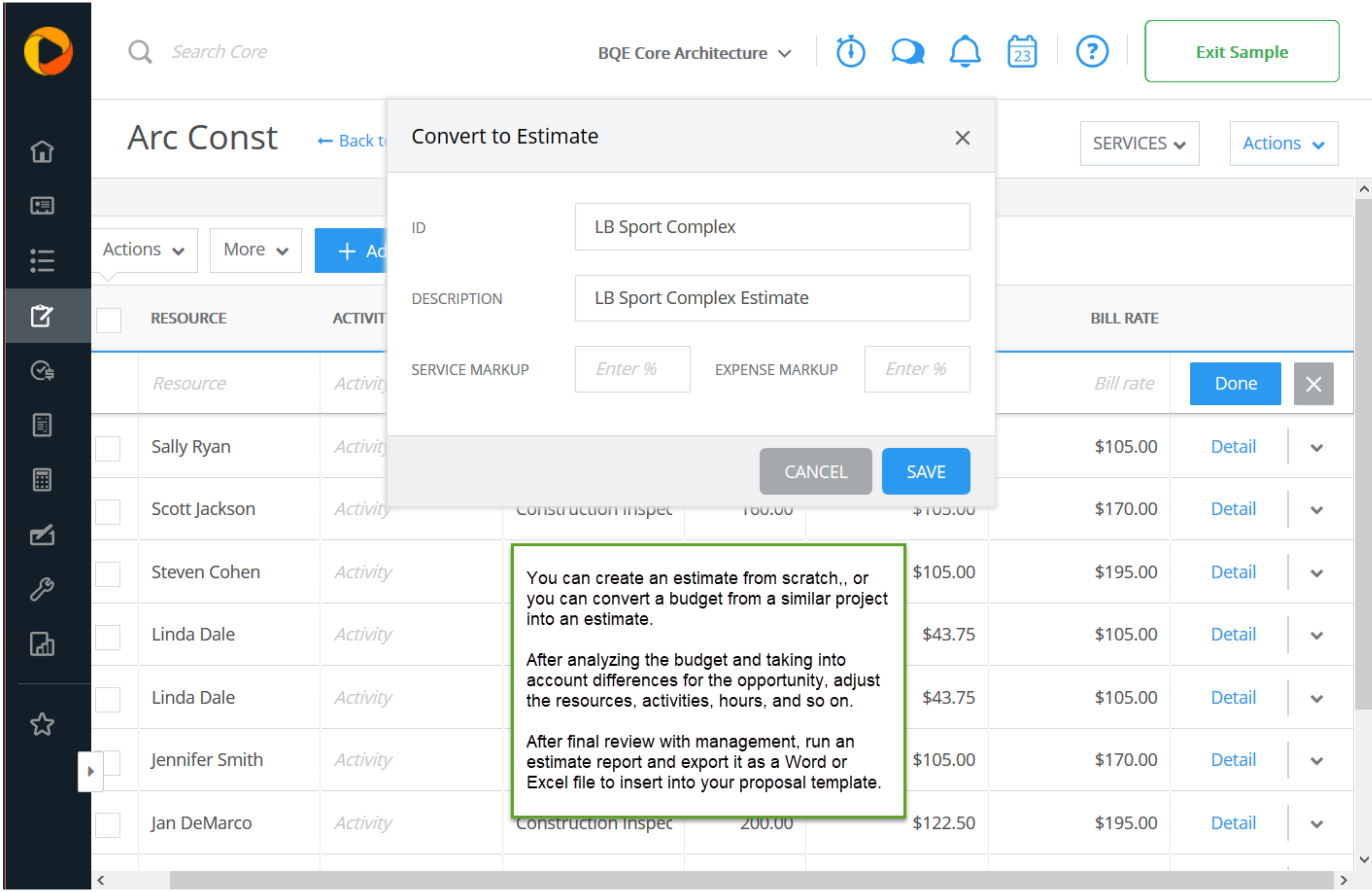

Search Core
BQE Core Architecture
Exit Sample
Long Beach Sports...
← Back to Projects
GENERAL
Actions
PROJECT ID *
Opportunity-00001
CONTRACT TYPE *
Marketing
PROJECT NAME *
Long Beach Sports Complex Proposa
CONTRACT AMOUNT
$75,245.00
Split Amount
CLIENT *
Long Beach Sports
PROJECT PO #
Enter Number
PARENT PROJECT
Parent ID
% OF
STATUS
Active
START
TYPE
Standard
DUE D
GROUP
Opportunities , All Projects
Assign Group(s)
% COMPLETE
0.0
ADDRESS
Street 1
BILLING CONTACT
Select contact
CANCEL
SAVE
For opportunities, decide on a common ID structure to make them easy to find in the project list.
Assign Marketing for the contract type, Active for Status, and Opportunities as the group.
After completing the estimate, enter the contract amount.


Search Core
BQE Core Architecture
Exit Sample
Long Beach Sports...
← Back t
With the opportunity project selected, select To-Dos from the list.
Enter the steps to be done, when they should be done, and who will do them. Click Done after entering each to-do.
TO-DOS
Actions
GENERAL
PERFORMANCE
TRANSACTIONS
BILLING SCHEDULE
DOCUMENTS
TO-DOS
NOTES
Actions
More
+ Add
DESCRIPTION
START DATE
END DATE
ASSIGNED TO
PRIORI
Description
Select date
Select date
Assigned to
Mediu
Done
Prepare estimate 10/10/2017 10/10/2017 Alice Shapiro High Detail
Management review 10/11/2017 10/11/2017 Jan DeMarco High Detail
Submit proposal (online) 10/13/2017 10/13/2017 Alice Shapiro High Detail
Prepare calculations 10/4/2017 10/9/2017 Jason Acosta High Detail
Review bid information 10/2/2017 10/2/2017 Alice Shapiro High Detail
Review bid materials & att ... 10/3/2017 10/3/2017 Alice Shapiro High Detail


Search Core
BQE Core Architecture
Exit Sample
Management KPI's
Actions
ADD WIDGETS
$500.0k
$0.00
Oct 16
Nov 16
Dec 16
Jan 17
Feb 17
Mar 17
Apr 17
May 17
Jun 17
Jul 17
Aug 17
Sep 17
Billed
Billable
Cost
30,000
20,000
10,000
0
TO-DOS
Complete calculations for Long
Due Monday October 02, 2017
Assigned by Scott Jackson To Alice Shapiro
Related to Client Long Beach Sports
Prepare estimate
Due Tuesday October 10, 2017
Assigned by Scott Jackson To Alice Shapiro
Related to Project Opportunity-00001
Submit proposal (online)
Due Friday October 13, 2017
Assigned by Scott Jackson To Alice Shapiro
Related to Project Opportunity-00001
Review bid information
Due Monday October 02, 2017
Add the To-Dos widget to the person's dashboard. Use the Filter option to limit the to-dos to the person.
Click on the to-do to update progress -- percent complete or completed.
You can also check the box to mark the to-do as completed. It will be removed from the To-Dos list.



Search Core
BQE Core Architecture
Exit Sample
Long Beach Sports...
← Back to Projects
DOCUMENTS
Actions
GENERAL
PERFORMANCE
TRANSACTIONS
BILLING SCHEDULE
DOCUMENTS
TO-DOS
NOTES
Actions
More
+ Add
NAME
DESCRIPTION
FILE TYPE
FILE SIZE
Expand Sports Complex.pdf
LB Sport Complex Files
pdf
384.4 KB
LB Sport Complex Expansion Draw...
LB Sport Complex Files
jpeg
52.88 KB
Proposal Guidelines.pdf
LB Sport Complex Files
pdf
200.15 KB
With the project/opportunity selected, choose Documents from the list.
Drag the files you want to attach to the opportunity.


Search Core
BQE Core Architecture
Exit Sample
Arc Const
← Back t
SERVICES
Actions
Actions
More
+ Ad
RESOURCE
ACTIVIT
BILL RATE
Resource
Activity
Bill rate
Done
Convert to Estimate
ID
LB Sport Complex
DESCRIPTION
LB Sport Complex Estimate
SERVICE MARKUP
Enter %
EXPENSE MARKUP
Enter %
CANCEL
SAVE
Sally Ryan
$105.00
Detail
Scott Jackson
$170.00
Detail
Steven Cohen
$105.00
$195.00
Detail
Linda Dale
$43.75
$105.00
Detail
Linda Dale
$43.75
$105.00
Detail
Jennifer Smith
$105.00
$170.00
Detail
Jan DeMarco
Construction Inspec
200.00
$122.50
$195.00
Detail
You can create an estimate from scratch,, or you can convert a budget from a similar project into an estimate.
After analyzing the budget and taking into account differences for the opportunity, adjust the resources, activities, hours, and so on.
After final review with management, run an estimate report and export it as a Word or Excel file to insert into your proposal template.