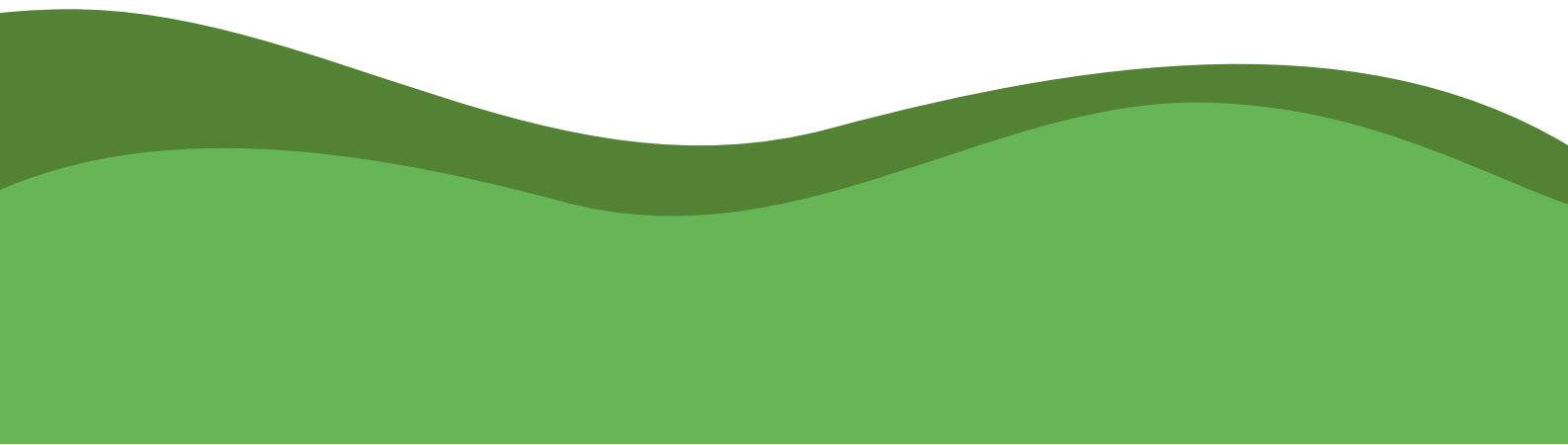


coretime<sup>TM</sup>

## 5.3 Release Notes

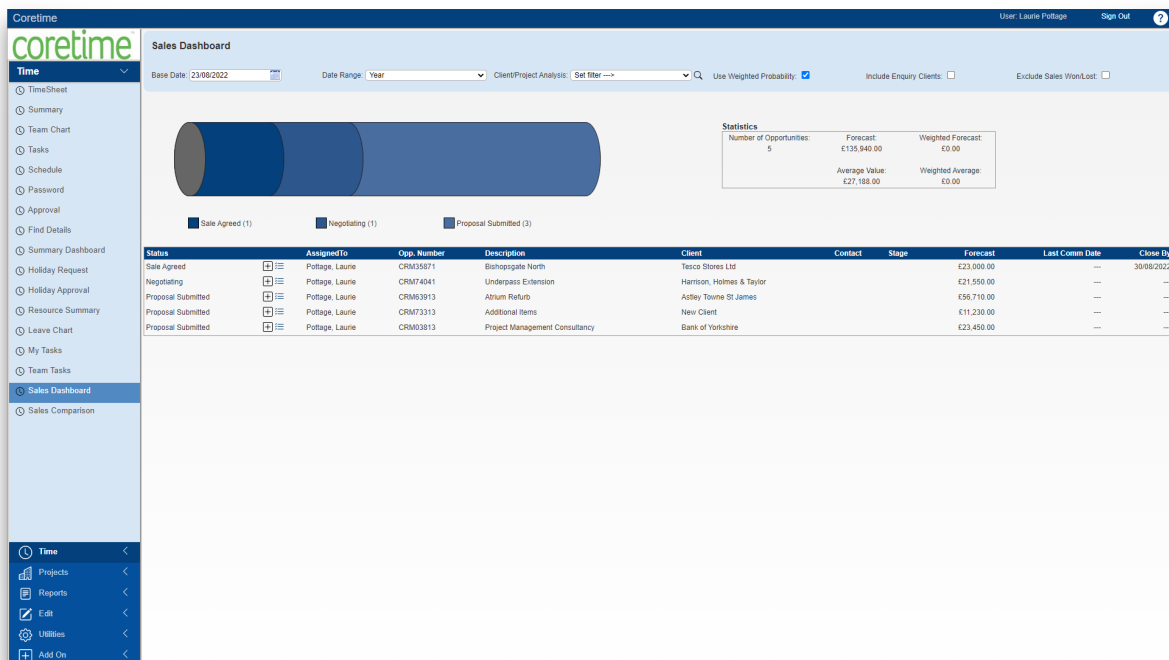


# Coretime CRM

Working hand in hand with your Coretime Project Management System, Coretime CRM is an exciting new module that allows you to see all communications and interactions with your Clients in the same place.

Coretime CRM allows you to drill-down to view communications at the Contact, Project or Client level, ensuring a 360-degree view of your interactions at any one time.

Fully GDPR compliant with a comprehensive search function to interrogate the database it's impossible to not always have full project visibility.

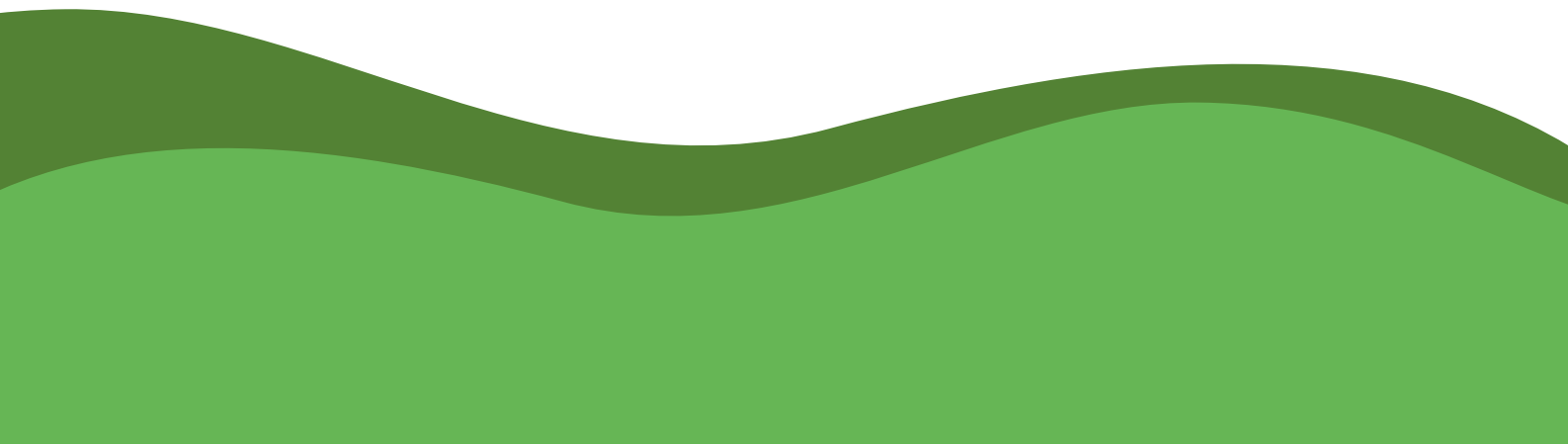


# Quotations

- Extension of the Coretime Budget screen
- Allows users to save, print & email Budgets as Quotations
- Also has an audit tracking function as it saves every iteration of the quote

## Coretime Mobile (embedded)

Coretime Mobile has now been embedded into the Coretime product so can be accessed & maintained from within the system (this module is chargeable).





New features

# Supervisor Rejections

- Supervisors now able to reject Time & Expense records.
- Email notifications to advise employees of these rejections

## View at Cost now or a User Profile option

New user profile option to enable/disable access to Cost elements on reports.

## Ability to approve/reject by individual item

Can now approve/reject by individual item rather than by full week



# Excel Imports

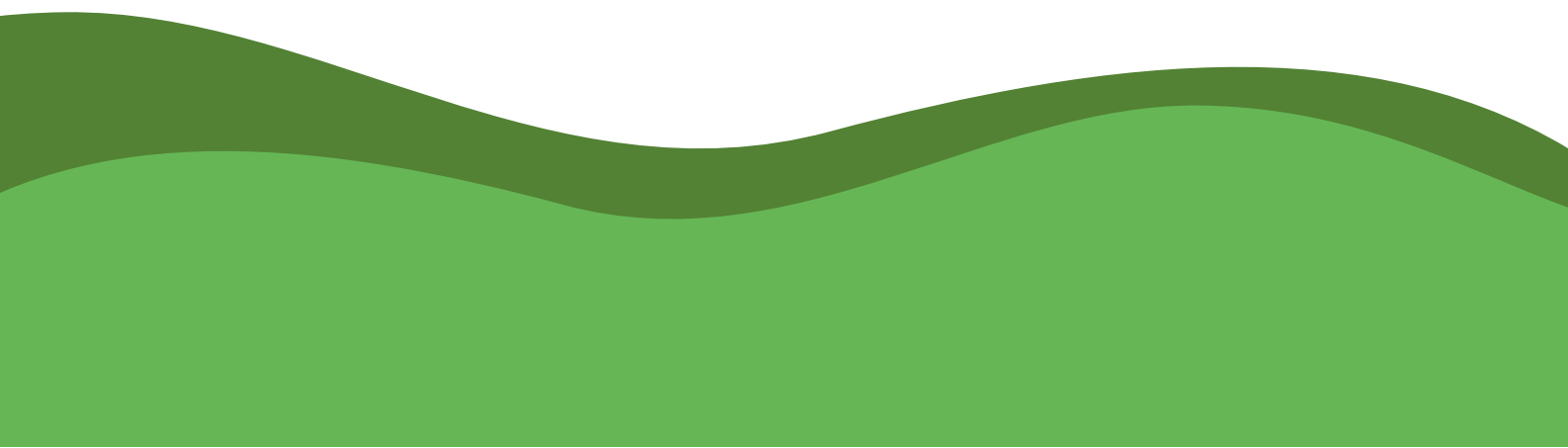
Improvements include more fields to populate and easier methods of importing records into datasets

# Carbon Footprint with Expenses

Enhancement to expense entry to capture CO2 data

# Contact on Projects

Ability to assign Contacts to Projects within Project Details screen



# Statement Manager

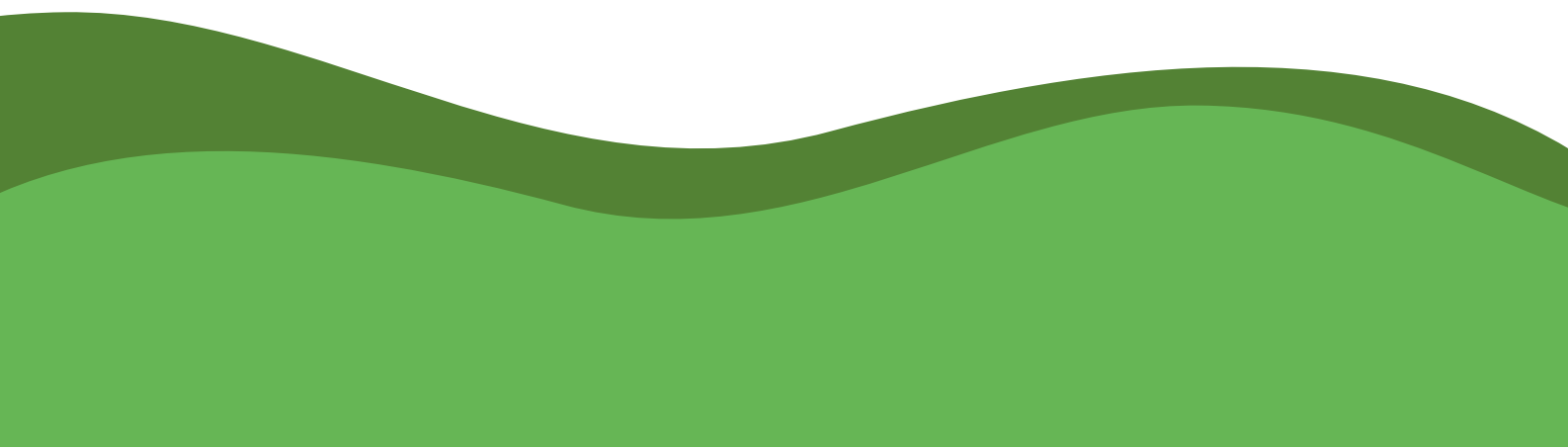
Enhancement to the Invoice Manager module to give ability for Statements to be printed/emailed on mass

# Sage Integration now compatible with CVA scheme (no payments)

All payment/receipts are dealt with in Sage then transferred to Coretime.

# Purge Utility

Ability to purge old inactive Clients, Projects and Employees

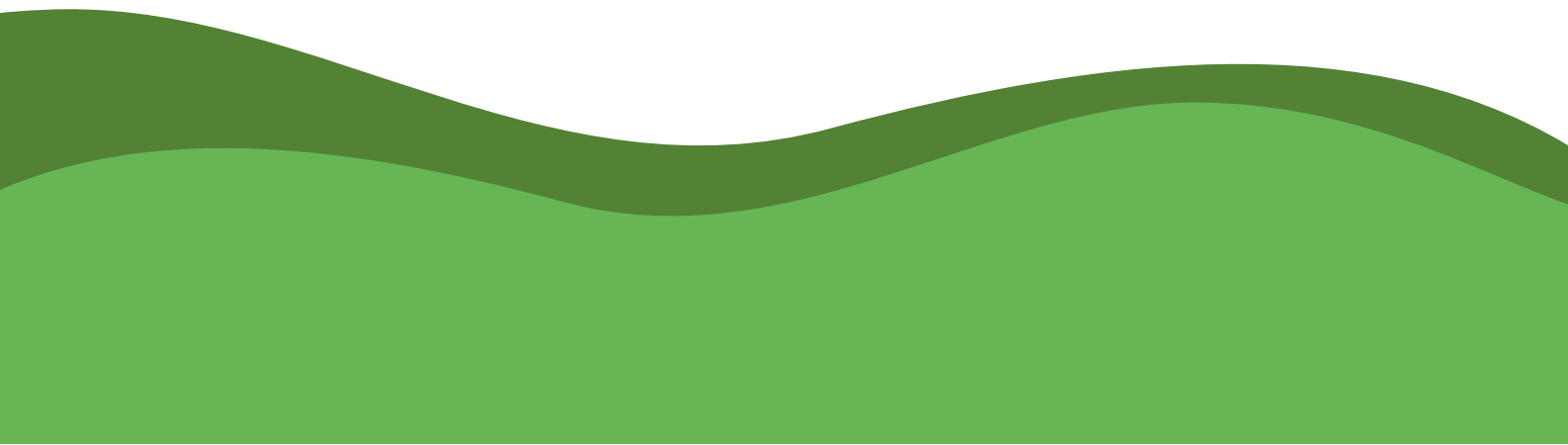


# Office 365 Integration (Holidays to Calendar)

- Need to have both the Holiday Manager module and Microsoft Office 365
- Syncs Coretime Holiday Manager with Microsoft Office 365 to show holiday entries in Outlook Calendar

## Updates to Coretime look and feel

- All screens in the TIME section of the product have been updated
- All dashboards have been modernised and updated







# Bug Fixes

- WAN on Time-entry
  - Annual Leave Report
  - Double click on calendars does not log user out
  - Employee Allocations on Invoices & Proformas
  - Sign off on Expense report
  - Budget Help Page
  - Added “Allow Overnight Entries” to System Options
  - Hyperlink to Staff Planner entries for Standard Users
- 