PROFESSIONAL SERVICES EDITION

Professional Services Firm

Jobs, time, milestones and work in progress.

For agencies, accounting practices, engineering consultancies and any firm that sells time and deliverables. Jobs and stages, tasks, a time clock and weekly timesheets, billing milestones, the WIP ledger and job profitability — with a client portal for engagements and invoices.

WHAT IT RUNS

- Jobs and projects with stages, tasks and a task board
- Time clock and weekly timesheets with bill and cost rates from the job
- Billing milestones and milestones ready to bill
- Project (WIP) ledger and WIP review; job profitability
- Leads, activities and the sales pipeline
- Client requests, announcements and calendar

THE APPS

Staff system
for partners, consultants, practice admin
the practice

Client app
for clients
their engagements, invoices and milestones, requests and messages

WHO SIGNS IN

Partner · Consultant · Practice admin

STANDARD IN EVERY EDITION

One set of books
Ledger, cashbook, sales, purchases and assets — shared by all

Every view audited
Who saw what, and when, on every record

Signatures & retention
Electronic signatures, records retention and legal holds

The AI Clean Gate
Every photo and post checked before anyone sees it

Messages & notices
Feed, calendar, two-way messages and self-registration

> “Unbilled time is visible every Friday, not discovered every quarter.