

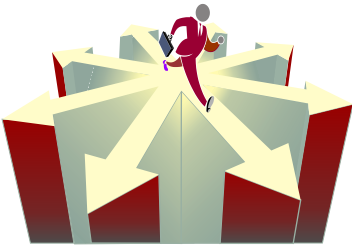


The Consultant's Partner

FOLLOW THE PATH TO SUCCESS!

SIMPLE EFFECTIVE ORGANIZATION!

T HE CONSULTANT'S PARTNER (TCP)



TCP has been specifically designed with the professional consultant in mind. The software provides for a centralized location for the daily administration of the services your business renders, the time consumed in performing these tasks, and the preparation and maintenance of invoices and receivables. In addition, TCP supplies its users with a place to keep contacts, prospects, letters, notes, appointments, messages and much more.



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■ General Features:

- Automatic installation
- Step by step tutorial
- Quick set up instructions
- On line help
- User friendly, uncluttered screens
- Unlimited number of clients
- Unlimited number of partners/ staff
- Unlimited number of services
- 10 alphanumeric character client ID code
- Integrated modules
- Network version available for
- Windows 95/98/ME/2000, XP, NT, and Novell



PROFESSIONAL BILL

1. Standard Bill permits you to invoice any charge. Each invoice may contain multiple entries, each detailed with its own date, staff, description, units, and rate.

2. Time Bill allows partial or complete billing of time transactions. Choose from 16 write up/down options. List time transactions on invoice or select header billing.

Automates and simplifies your complete invoicing process. Using any of its three distinct billing options, Standard Bill, Time Bill, or Quick Bill, you can easily invoice any client. All invoice text is user defined.

3. Quick Bill is used to print invoices for those clients that are on a fixed recurring fee or retainer fee. Upon setup, a record is created containing a description of the services, its amount and corresponding frequency (weekly, bi-weekly, quarterly, semi-annually, yearly, or other). Tag desired clients and frequencies, and invoices are immediately generated.

Features:

- Ability to email invoices
- Unlimited number of services per staff
- Ability to preset default rates for services, per staff
- Ability to preset billable service descriptions and text
- Unlimited number of time transactions per client
- Unlimited number of expense transactions
- Over 60 time productivity reports
- Unlimited number of recurring charges per client
- Ability to enter time transactions in batch mode by staff or client
- Detailed invoice history
- Income by services rendered reports
- Predefined invoice formats
- User defined invoice messages and text

TIME IT



Is your solution to automatically and accurately track time spent on client billable/non billable services. Simply select the client you or your staff is working with and start the timer. **Time It** will track the time spent on the client until you stop the timer. At the end of the day/week, simply post the generated time transactions to Professional Bill for further processing. Eliminate the hassles of manually calculating and recording time. Use **Time It** throughout your network or notebooks/laptops.

ACCOUNTS RECEIVABLE



Is an open item system. It effortlessly allows you to keep track of client related invoices, payments, adjustments and balances.

Features:

- User defined aging periods and statement messages (dunning messages)
- Ability to apply finance charges on a per client basis
- On screen client account inquiry
- On screen total A/R outstanding (open) balance inquiry
- Invoices journal selectable by date
- Adjustments journal selectable by date
- Payments journal selectable by date
- Ability to print aging report by client
- Ability to print statements by client
- Detailed customer A/R history
- Ability to email statements

BUSINESS NOTES



Permits you to track an unlimited number of client related notes. A subject, event type, status, contact, initial date and follow-up date can be attached to each note. Client notes may be accessed from within any module.

Features:

- Unlimited number of notes per client
- Search and/or print notes by client ID, name, initial date or follow up date
- Ability to email notes
- Create boiler plate letters
- Perform mailmerge routines
- Unlimited number of notes per staff

SCHEDULER & MESSAGES



Allows your staff to maintain and track important meetings, appointments and telephone calls. You may select to view your appointments by date, client or staff ID. The Message Board displays any outstanding calls.

- Unlimited number of messages
- Unlimited number of appointments or meetings
- Ability to transfer appointments/engagements from year to year
- View your message board at the touch of a key

MILEAGE TRACKER

Use Mileage Tracker on your desktop computer or interface it with your PDA, allowing you to effortlessly track your related mileage and travel expenses.



IMPORT/EXPORT UTILITY

As comprehensive as The Consultant's Partner is, you may initially wish to import your current data. There might also be occasions in which you wish you could have your data in another format. The export utility allows you to do just that.

REPORT WRITER (Optional)

New reports are continuously added to The Consultant's Partner on a timely basis. But if your organization requires the capability to generate specialized reports, Report Writer is just the tool you want.

PDA INTERFACE

The PDA Interface utility allows you to export/import data between The Consultant's Partner desktop application and your PDA.

SUPPORT

Although simple to use and containing detailed on-line help and tutorials, our staff stands ready to assist you with any questions you may have.

The Consultant's Partner
is more than just an outstanding
business management system,
it's simple, effective organization!