

# Web Suite

**Time Billing and Business Management Software**

*Built With **Your** Industry Knowledge*

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## **Web Suite 2012 Getting Started Guide**

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## Web Suite Setup Checklist

✓	Task	Resources & References
<b>Pre-Installation</b>	<input type="checkbox"/> Check your <a href="#">system requirements</a>	<a href="#">Server Requirements</a> <a href="#">Client Requirements</a>
<b><a href="#">Installation Preparation</a></b>	<input type="checkbox"/> Install Internet Information Services on your server	<a href="#">How Do I Install IIS on Web Server?</a> <a href="#">How Do I Add Components to IIS?</a>
	<input type="checkbox"/> Install Microsoft SQL Server on your server	Read <a href="#">Install SQL Server 2008</a> Watch <a href="#">How to Install SQL Server 2008</a>
<b><a href="#">Installation</a></b>	<input type="checkbox"/> Download Web Suite setup	<a href="#">Web Suite Support Downloads</a>
	<input type="checkbox"/> Log in to Windows as an Administrator and install Web Suite	Read <a href="#">Installation</a>
<b><a href="#">Start-Up</a></b>	<input type="checkbox"/> Launch Web Suite on a server or client machine	<a href="#">Start Up Web Suite</a>
	<input type="checkbox"/> Log into your Web Suite company	<a href="#">Login</a>
	<input type="checkbox"/> Activate and license Web Suite	<a href="#">Product Activation</a> <a href="#">Licensing</a>
<b>Deployment</b>	<input type="checkbox"/> Set up Web Suite master information and preferences	<a href="#">Master Information</a> <a href="#">Time and Billing</a> <a href="#">Reports</a>

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# Introduction

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Welcome to Web Suite from **BQE Software, Inc!**

Web Suite is a web-based time tracking, project management and billing software. Many professionals and consultants spend most of their time out of office—at a client's site, satellite office or at home. Usually, employees or consultants on-the-move submit their time and expenses by mail, fax or email. At the receiving end, the records must be imported or manually entered into the time billing software. To make this process quick and easy, Web Suite provides a fantastic solution by extending the reach of BillQuick to remote users via the Internet.

With Web Suite, you can access almost all the features and functions of BillQuick via Internet on a PC, laptop or web-enabled mobile devices. You can capture time and expense and do much more from your Smartphone.

The goal of this **Web Suite Getting Started Guide** is to help you get started and become comfortable interacting with the program. It explains the concepts and procedures involved in setting up of Web Suite, focusing on its installation, activation, registration, basic and main functionalities such as master information and flow of data throughout the program, time and expense tracking, billing, project management and reporting.

Thus, this guide enables you to quickly educate yourself on how to run and use Web Suite effectively and efficiently.



The Web Suite Getting Started Guide is not a complete training solution. It is a guided tour designed to set up and familiarize you with Web Suite. After completing the guide, we recommend that you explore the **Web Suite Help**. In particular, check out the How Do I help items. Based on your preferred learning style and available time, you can choose self-learning or guided learning. Guided learning utilizes role-based and custom training courses. *Check out [www.bqe.com/Services](http://www.bqe.com/Services) for more.*

# System Requirements

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For successful installation and implementation of your Web Suite software, be sure your computer systems meet or exceed the requirements mentioned below.

## Server Requirements

### Hardware Requirements

- 2 GHz Intel Pentium IV or faster
- 2GB RAM or more (4 GB recommended)
- At least 2 GB of free hard disk space required



Be sure your network server contains sufficient memory and other resources for efficient, high speed operation.

## Software Requirements

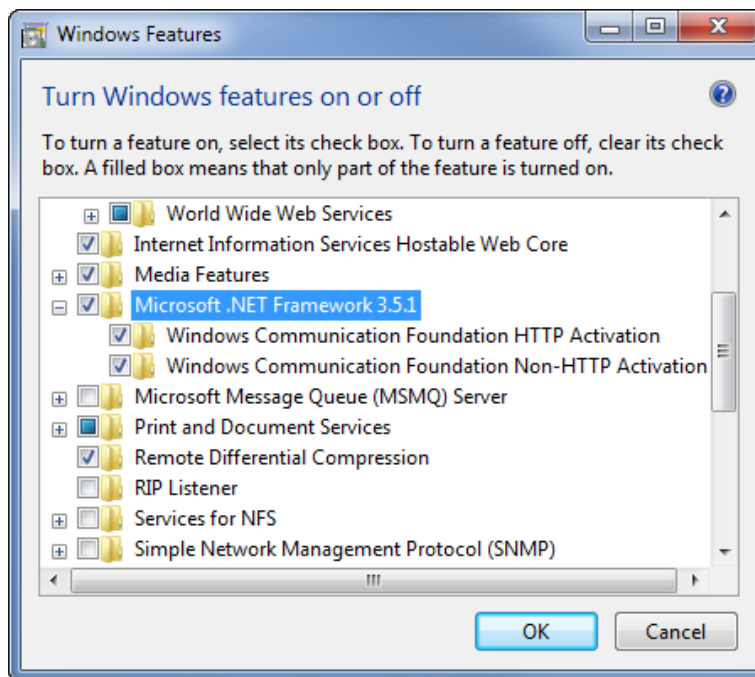
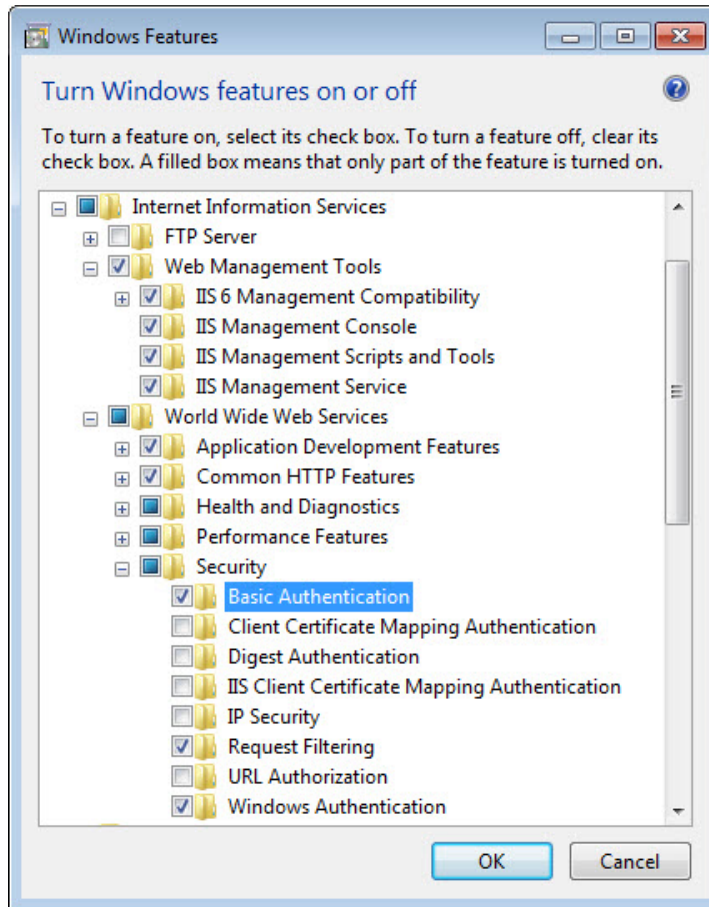
### Operating System Requirements

- Windows Server (2003 or 2008), Windows 7 (Business or Ultimate), Windows Vista (Business or Ultimate)
- Microsoft .NET Framework 4.0
- Internet Information Server 6.0 (or later) (*see Special Note below*)
- MDAC 2.8 (or higher)
- SQL Server 2005/2008/2008R2, Microsoft Small Business Server (2008 or 2011)



*Certain Windows features, shown in the following image, must be enabled for Web Suite to function properly.*

## System Requirements



# Client/Workstation Requirements

## Hardware Requirements

- 2 GHz Intel Pentium or faster
- 1 GB RAM or more (2 GB recommended)

## Software Requirements

- Windows 2000, XP, Vista, Windows 7, Mac OS 10.0 or later
- Internet Explorer 7.0 or later, Chrome 7.0 or later, Firefox 4.0 or later, Opera 11.0 or later, or Safari 5.0 or later



Be sure to install the latest Windows service packs and critical updates. Check the Microsoft web site for the latest updates to Windows, .Net Framework, and Data Access Components. Some versions of Windows include an Automatic Update option.



When using Windows Server 2008, Windows Vista Business or Windows 7 with Internet Information Server 7.0, make sure to turn on the IIS feature on your server. Using the Control Panel-Programs, select the 'Turn Windows features on or off' link. In the list will be Internet Information Services. Check relevant options.

# Installation

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Web Suite 2012 is a server-based application requiring one machine to function as a 'web server' and 'data server' that can host both Web Suite web application and web data. (Note: Web Suite system can be hosted on two servers one can be dedicated for web application and another can be dedicated for data.) The procedure is safe and can be set up on a secured server. Users can access Web Suite via the Internet or Intranet. Optionally, in-house users can access it via a local or wide area network when properly configured. If you have only a single license and single machine for your firm, you can use it to use as a server and client machine.

Web Suite has two main components – a public web application (site) and an admin web application(site). Both of them are installed by the Web Suite setup program on your IIS (Internet Information Server) i.e., Web Server running compatible server software.

Basic start-up procedures for Web Suite involve these key steps (see *below for details*):

1. Install Web Suite on your server
2. Create a company file
3. Activate Web Suite
4. Log into Web Suite

## Installation Preparation

Before installing Web Suite, you must do the following:

1. Please read the [End User License Agreement \(EULA\)](#).
2. Make sure your server (host) and client computers meet the system requirements (See [System Requirements](#) for details). The server must have Windows operating system while the client can have Windows or Mac OS.



If you only have a Mac system, you can install Web Suite on it using a Windows virtual environment. This virtual Windows OS will function as a web server, hosting the Web Suite data for you. Check out virtualization software vendors like [VMware](#).

3. Make sure you have installed Microsoft SQL Server on your system (server). If not, then you may download and install a free version of it (Express Edition) from:

<http://www.microsoft.com/en-us/download/details.aspx?id=23650>



Please see [http://msdn.microsoft.com/en-us/library/cc281837\(v=sql.105\)](http://msdn.microsoft.com/en-us/library/cc281837(v=sql.105)) on how to install SQL Server 2008 R2.



## Installation

**Note:** Make sure to note the location, Instance Name, Instance ID and Password of the SQL Server you are installing.

4. At the time of Web Suite installation:
  - log in to your web server as an Administrator
  - disable firewall and anti-virus protection
5. If you have purchased Web Suite, you should have received a link via email for where you can download the installation file (setup). Otherwise, download the Web Suite installer from our website and save it on the desktop of the server/host computer:

<http://www.bqe.com/Support.asp?pageld=Download&prodId=WS>



The installer or setup is a zipped file. You will need a Zip archiving or extraction program. Windows Vista or 7 has an extraction utility built into its Windows Explorer.

## Web Suite Installation

Web Suite has two main components – a Public Web Site and an Admin Web Site. Both of them are installed by the Web Suite setup program on your IIS Web Server running compatible server software. To install Web Suite you must be logged in as ‘Administrator’ on the web server that is running Microsoft Internet Information Server. Your IIS web server should be properly configured to run ASP.NET 2.0 web applications.

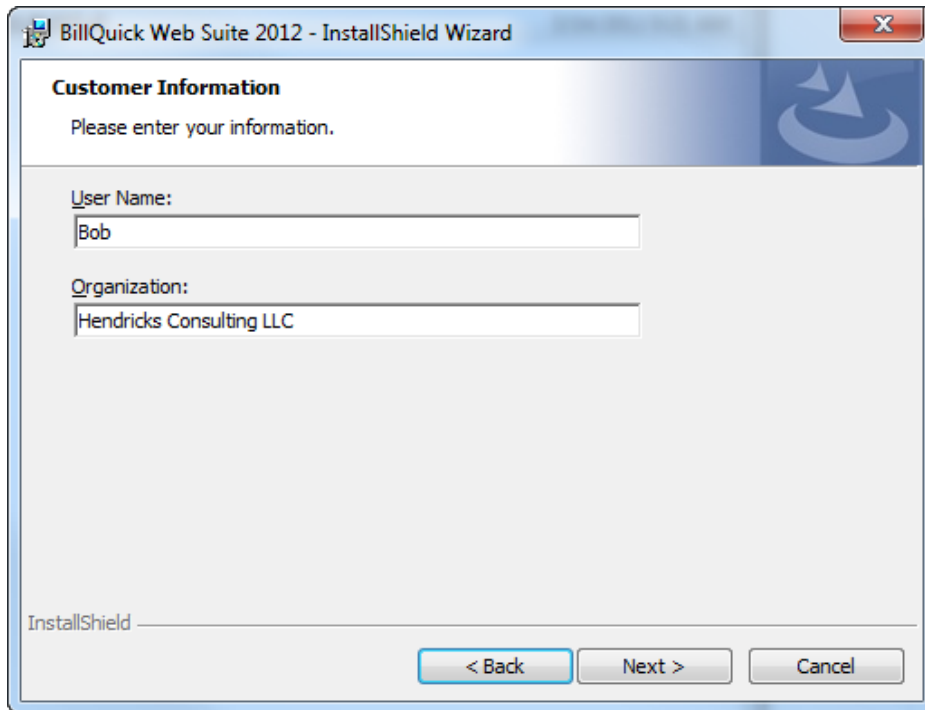
Follow the steps below to install Web Suite on your server.

1. After downloading and extracting Web Suite 2012 from the archive, navigate to the folder where you placed the extracted files. Double-click on WS2012Setup.exe.
2. When the BillQuick Web Suite 2012 Install Shield Wizard displays, read the information and follow the instructions. Click Next.

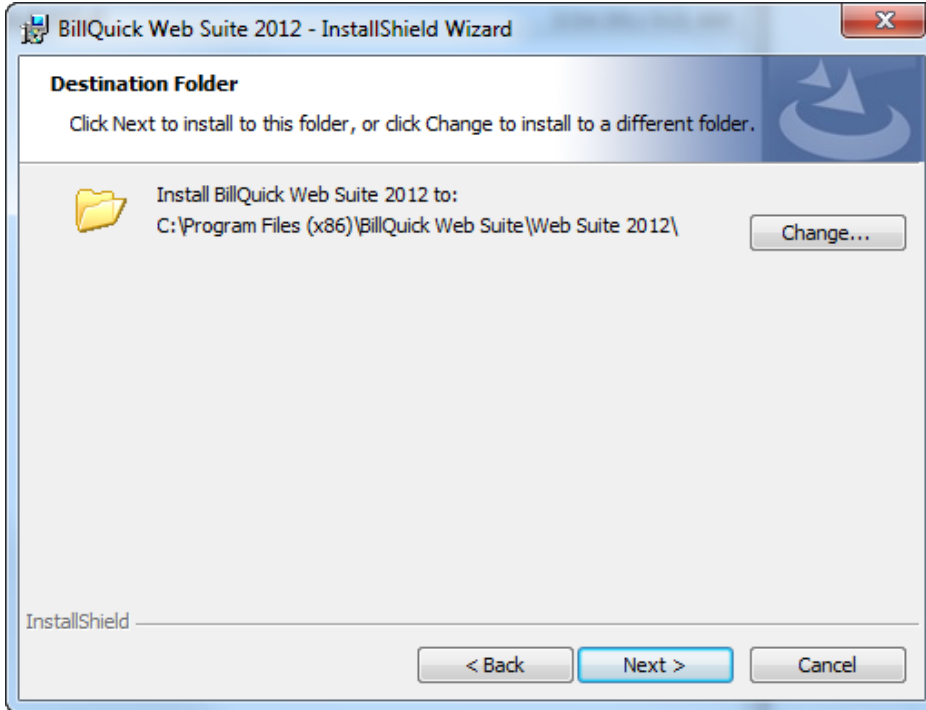
## Installation



3. Provide Customer Information by entering the User Name and Organization. Click Next.



4. Accept the default Destination Folder or click Change to specify a different location. Click Next.



5. Once the installation begins, a progress bar displays. When the Finished screen appears, click Finish.
6. After installation is complete, you are prompted by a dialog. If the dialog does not display,

click  on your desktop.

You can also open the Internet browser and type the URL (address) of your web site:


<http://www.MyDomain.com/WS2012/default.aspx>

*MyDomain.com* is your web site domain name. Alternatively, you may use the IP address (local host or computer name) of the server, say:

<http://192.168.1.45/WS2012/default.aspx> or  
<http://computername/WS2012/default.aspx> or  
<http://localhost/WS2012/default.aspx> or  
<http://127.0.0.1/WS2012/default.aspx>

## Advanced Installation

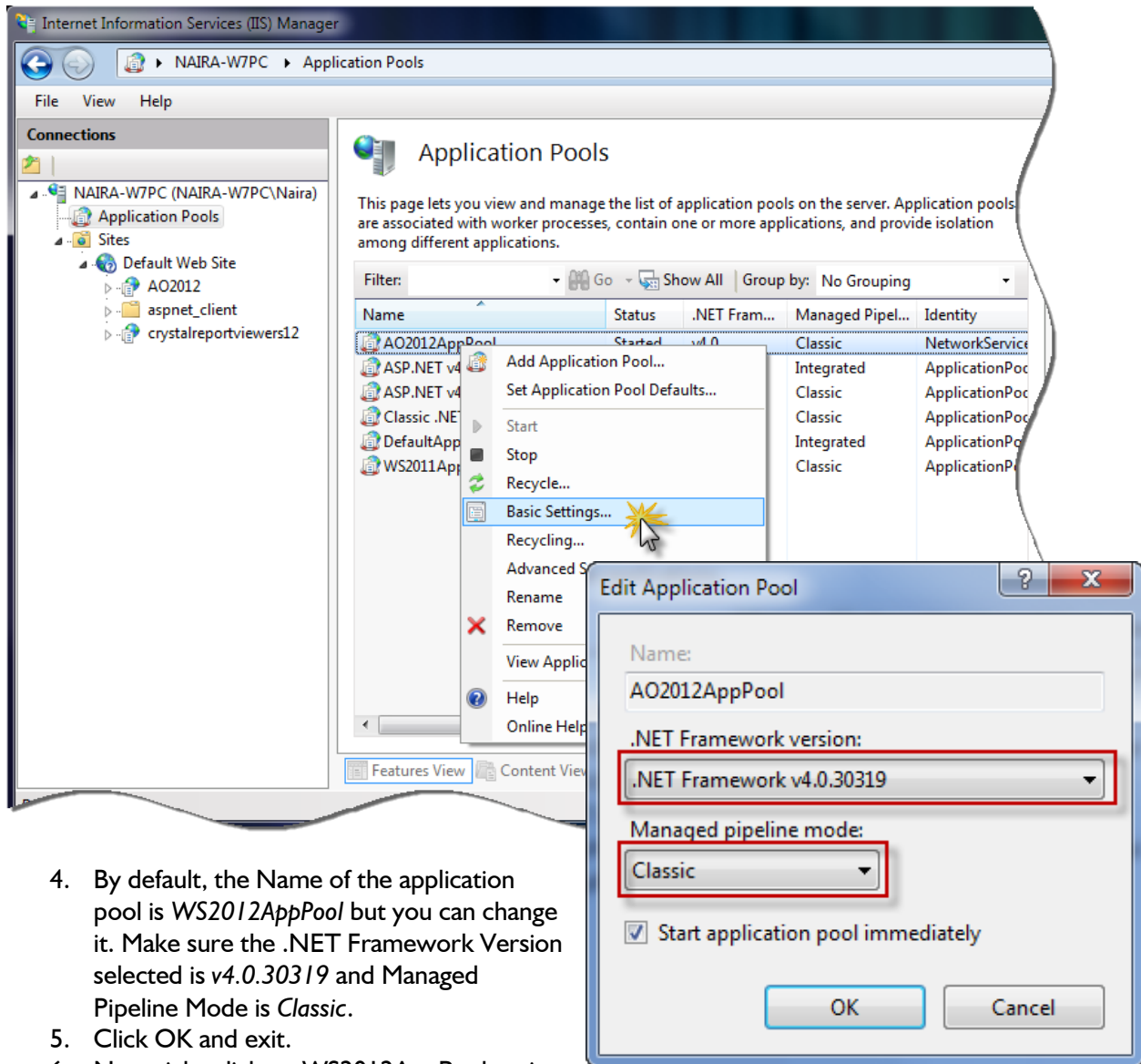
By default, the setup process for Web Suite creates the WS2012 Application under the Default Web Site in Internet Information Services (IIS) and assigns Anonymous Authentication to it. It also creates the Admin Virtual Directory (Application) under WS2012 and assigns Windows Authentication to it.

 If you are using IIS 6.0 or lower, use Virtual Directory instead of Application.

## Installation

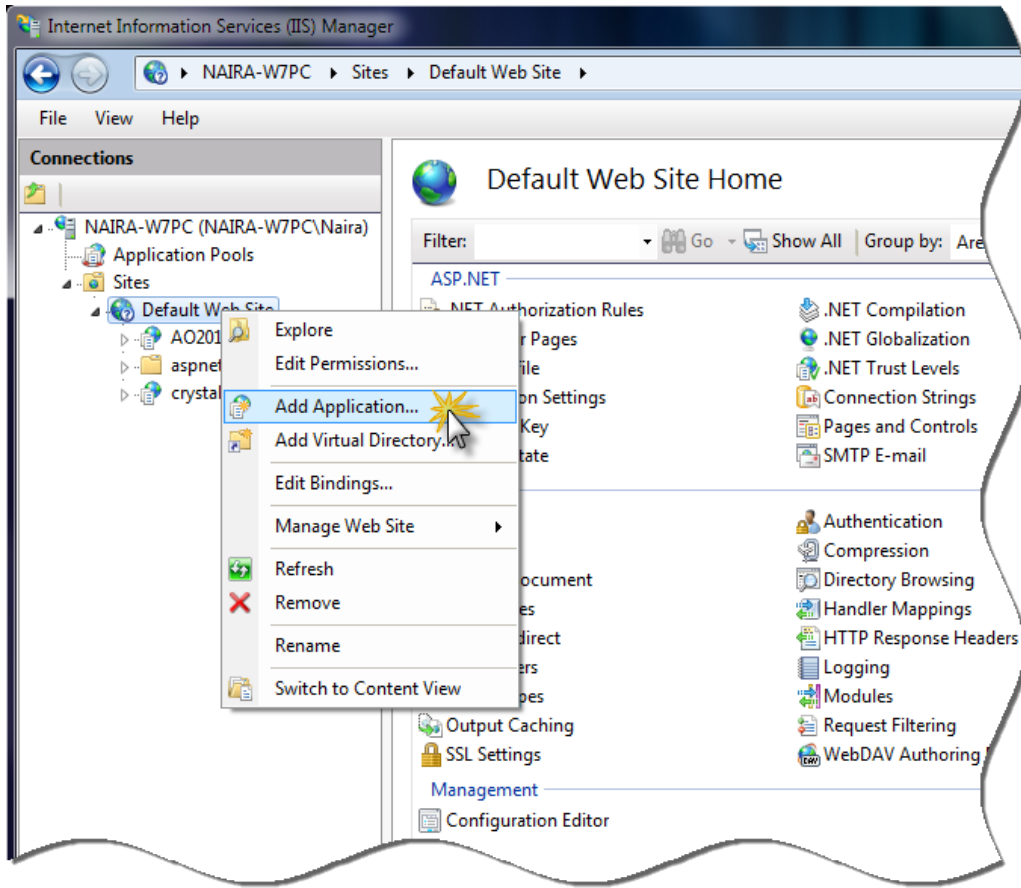
If you prefer Web Suite to be under a new Web Site or to change the configuration, follow the instructions below:

1. Go to Start > Control Panel > System and Security > Administrative Tools > Internet Information Services (IIS) Manager.
2. On the left panel, select Application Pools. You can create a new Application Pool e.g. AO2012AppPool.
3. On the right panel, right-click on WS2012AppPool and select Basic Settings. your newly created application pool e.g.

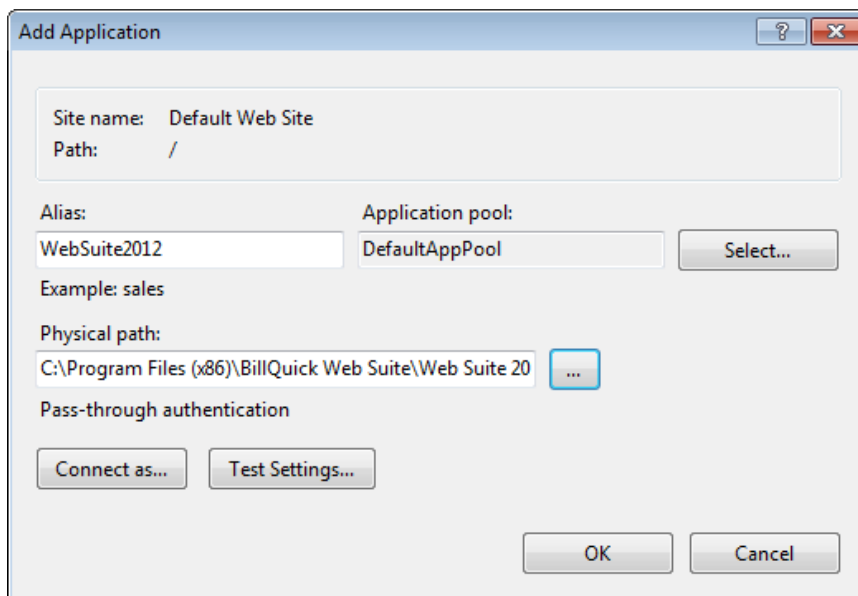


4. By default, the Name of the application pool is *WS2012AppPool* but you can change it. Make sure the .NET Framework Version selected is *v4.0.30319* and Managed Pipeline Mode is *Classic*.
5. Click OK and exit.
6. Now right-click on *WS2012AppPool* again and select *Advanced Settings*.
7. Under *General*, make sure *Enable 32-Bit Applications* is set to *True* and under *Process Model*, *Identity* is set to *NetworkService*. Click OK and exit.
8. Under *Sites*, right-click on your *Default Web Site* (or your preferred web site) and select *Add Application*.

## Installation

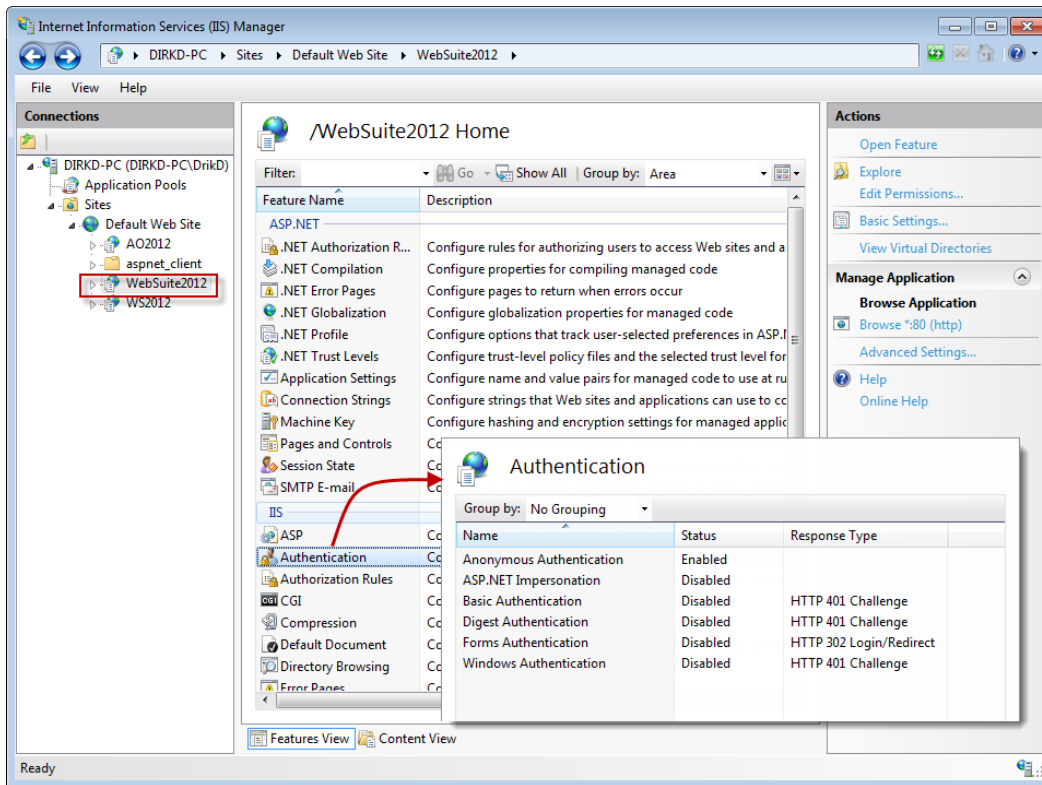


9. In the Add Application dialog, enter *WebSuite2012* (or any other name) as an alias for the application.



## Installation

10. Check the Application Pool (e.g AO2012AppPool) to make sure it is the one you want. To select a different pool, click Select and choose the right one.
11. Next, enter the Physical Path or browse to navigate to the folder containing the Web Suite public web site files. Typically, public component files are in the C:\Program Files (x86)\BillQuick Web Suite\Web Suite 2012\public folder. Click OK.
12. Right-click on *WebSuite2012* and select Add Application.
13. Enter *Admin* as an alias for the application.
14. Enter the Physical Path or browse to the folder containing the Web Suite admin web site files. Typically, admin component files are in the C:\Program Files (x86)\BillQuick Web Suite\Web Suite 2012\admin folder. Click OK.
15. Now select *WebSuite2012* application on the left panel. On the middle panel under IIS, open or double-click Authentication.



16. Make sure Anonymous Authentication is enabled here while the other options are disabled.
17. Next, select *WebSuite2012 > Admin* application on the left panel. On the right panel under IIS, open or double-click Authentication.
18. Make sure Windows Authentication is enabled here while the other options are disabled.

You have successfully configured the IIS!



If you are experiencing problems while installing Web Suite, please check the BQE [Knowledgebase Articles](#). For additional help, contact us at (800) 371-0130 (ext#0) or [support@bqe.com](mailto:support@bqe.com).

# Start-Up

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In order to get Web Suite into the running mode please follow the steps below. At this point Web Suite should already be installed on your PC.

## Web Suite Database

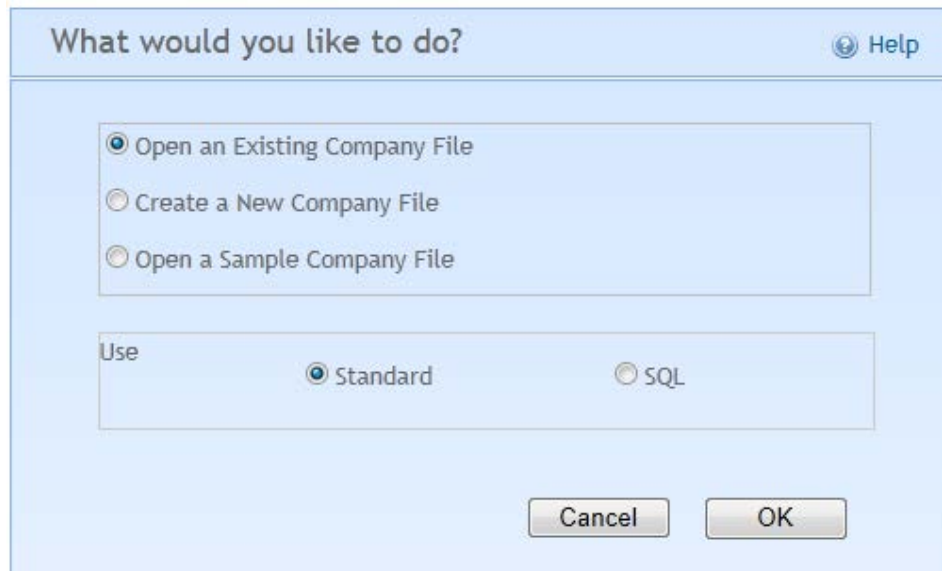
When Web Suite opens for the first time, it prompts you with the 'What would you like to do?' dialog. You can open an existing company file, sample company file or create a new one. If the database created in BillQuick already exists, you can open it with Web Suite. You can open or create a database from/on the same drive as where your Web Suite application or IIS is installed.

When creating a new company database, you can also select the type of database you want to use, Standard (Microsoft Access) or SQL (Microsoft SQL Express or SQL Server). Your options depend on which edition of Web Suite you purchase: Basic, Pro or Enterprise. For the database type you select, follow the instructions below.

## Standard Database

To create a new company database:

1. When prompted, select 'Create a New Company File' option. Else, do so by clicking Admin Options on the Login screen.




## Start-Up


2. Select the Standard database type and click OK. The Standard database used by BillQuick and Web Suite is the Microsoft Access – JET database.
3. Enter your Company Name and Data File Name (*generally same as your Company Name*).


### Create a new database Help


Please enter your company name and data file name. By default your data file will be created in BillQuickData folder on the same drive as your web site.  
Example: C:\BillQuickData\2012\MyCompany.mdb


Company Name:

Data File Name:  

Folder for attachments:  

Folder for reports:  

Folder for Invoices:  

Log File Location:  


Automatically log actions to a log file

4. Navigate to the folder where you want to store your company database. If you are in a network environment, this should be a shared folder with correct permissions (see **Special Note – MS Access Database Folder Permissions** below).
5. Provide folder location for your reports, invoices, attachments and log file. E.g. C:\Program Files\BillQuick Web Suite\Web Suite 2012\public\.
6. Click Create. You will be prompted to log in.



If you do not specify the path for your company database, Web Suite creates it under a default location: X:\BillQuickData\2012\ where X: is the physical drive letter where IIS is installed.



 For security reasons, it is **strongly** recommended that you keep your database outside the Inetpub folder. It is best to keep your company database behind a firewall.

**Special Note**

MS Access Database Folder Permissions

Explore to the folder where the BillQuick database is located. Depending upon your web server operating system, you will need to enable sharing or assign the proper permissions. If your company database is not on the same computer as your website, you may need to use impersonation.

Operating System	Permissions
Windows XP Professional (SP3)	Enable full sharing or Enable full permission to ASPNET Account
Windows Server 2003 (SP3)	Enable full permission to NETWORK SERVICE Account
Windows Server 2008	Enable full permission to NETWORK SERVICE Account
Windows Vista Business/Ultimate	Enable full permission to NETWORK SERVICE Account
Windows 7 Business/Ultimate	Enable full permission to NETWORK SERVICE Account

How you set the permissions depends on your operating system version. Consult your operating system documentation for details. Below are some links to online documentation for setting share permissions.


Windows XP:

<http://www.microsoft.com/technet/prodtechnol/winxpro/maintain/fileshearing.msp>

## SQL Express and SQL Database

The instructions given below apply when you want to create a company file using Microsoft SQL Express (2005 or 2008) or SQL Server database.

1. When prompted, select 'Create a New Company File' option. Else, do so by clicking Admin Options on the Login screen.
2. Select the SQL database option and click OK.

 You will find many tools and resources online to help you check and test the ODBC connectivity to your SQL Server (<http://support.microsoft.com/kb/827422> )

## Start-Up

What would you like to do? [Help](#)

Open an Existing Company File  
 Create a New Company File  
 Open a Sample Company File

Use  Standard  SQL

Cancel OK

3. Make sure your Web Server is able to connect to your SQL Express or SQL Server database application.

Create a new database [Help](#)

Please enter SQL Server Name, database name and SQL Server system administrator's User ID and Password.

Company Name:

Data File Name:

Use SQL Server

Server Name:

Use Windows Authentication

SQL Server User ID:

SQL Server Password:

Folder for attachments:

Folder for reports:

Folder for Invoices:

Log File Location:

Automatically log actions to a log file

Cancel Create

4. Enter the following:

- Your Company Name and Data File Name (*generally the same as your Company Name*).
- Server Name, its IP address or SQL Server Name preceded by a \ with an Instance Name
- SQL Server User ID (System Administrator)
- SQL Server Password (System Administrator)
- Folder location for attachments, reports, invoices and log file



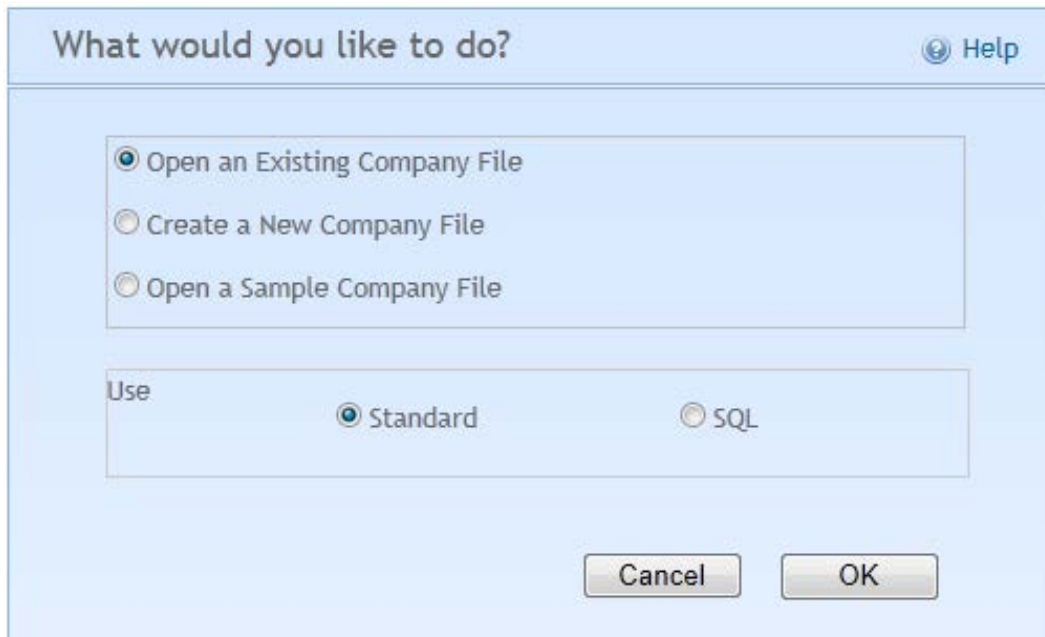
You can specify any SQL Server account or use Windows Authentication as long as you have proper permissions to create a new database on your SQL Server account.

5. Click Create. You will be prompted to log in.

If you have upgraded from a previous version of Web Suite and have an existing data file, you are able to open it here. You are provided with the option to migrate your previous settings to the current version.

To open an existing company database:


1. When prompted, select 'Open an Existing Company File'. Else, do so by clicking the Admin Options dialog on the Login screen.





2. Select the Standard or SQL database type and click OK.
3. If you select Standard, click to browse for your Data File Name (.mdb). Also, provide the folder location for your attachments, reports, invoices and log file.


**Open an existing database** Help


Please enter full path of your BillQuick 2011 data file.  
Example: C:\BillQuickData\2011\MyCompany.mdb

Data File Name:  

Folder for attachments:  

Folder for reports:  

Folder for Invoices:  

Log File Location:  


Automatically log actions to a log file

Migrate global, user and filter settings from previous version.

If you use SQL Express or SQL Server for your company database, make sure your Web Server connects to the SQL Express or SQL Server database.

Enter the following:

- Your Data File Name
  - Server Name, its IP address or SQL Server Name preceded by a \ with an Instance Name
  - SQL Server User ID (System Administrator)
  - SQL Server Password (System Administrator)
  - Folder location for attachments, reports, invoices and log file
4. Check the option to migrate (copy) your previous version's global settings, filter settings and assigned Web users to the current version.
  5. Click Open. You will be prompted to log in.

 You can link files to employee, project, client, time, expense and other records in Web Suite. Those files get uploaded on to the server location that is specified in the 'Folder for attachments' field. In case none is specified, the default is X:\BillQuickData\2012\FileAttachment.

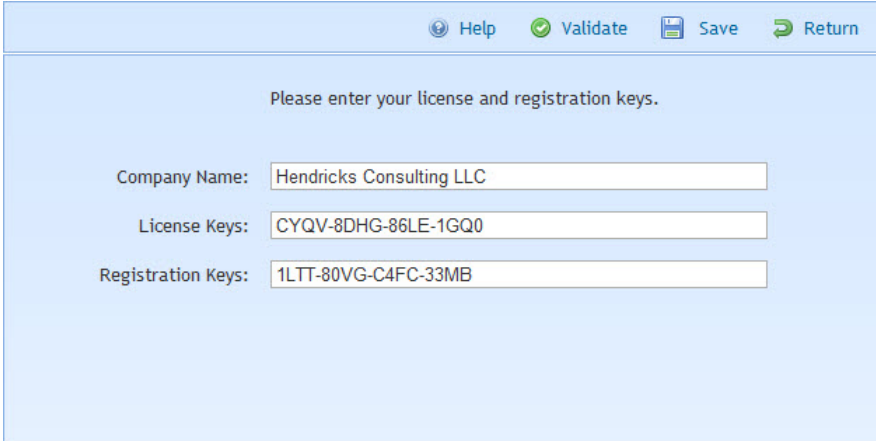
## Product Activation

Once you have created your company database, you can activate your product. Web Suite is activated by entering the license and registration keys provided by BQE Software. You may activate Web Suite immediately after installing it or after working with a trial copy. You can evaluate Web Suite for 30 days with full functionality (*no need for an evaluation key*). After the evaluation period is over, you must purchase a full software license and install it.

When you are ready to purchase Web Suite, contact your BillQuick Account Rep at (310) 602-4020. After purchasing your product licenses, follow the instructions below.

## Licensing and Registration

1. After purchasing Web Suite, open it. If you received a message that your trial period has expired, you will see a link to License and Register. Else, after logging in, click Settings on the navigation bar and select the Company tab.
2. On the Company screen click '[Click here to License and Register...](#)'



Please enter your license and registration keys.

Company Name:

License Keys:

Registration Keys:

3. Enter or check your Company Name. It should be exactly the same (spelling, capitalization, punctuation) as the license and registration email you received from BQE Software.
4. Enter the keys or cut - paste them from the email.
5. Click Save and then Validate.
6. If no message displays, click Return to exit.

Web Suite is now ready to use. Work with the BillQuick Supervisor to ensure data and company procedures are ready for the rest of the company.


# Web Suite Basics

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This section focuses on the basics of the Web Suite environment. It covers:

- Starting-up Web Suite
- Logging into Web Suite
- Navigating Web Suite

## Start-Up

Click  to launch Web Suite. Else, start Internet Explorer (or another supported browser), then type the URL for your web site, for example, <http://www.mydomain.com/WS2012/default.aspx>, where 'mydomain.com' is your web site domain name. Alternatively, you may use the IP address (local host or computer name) of the server, for example

<http://192.168.1.45/WS2012/default.aspx> or  
<http://computername/WS2012/default.aspx> or  
<http://localhost/WS2012/default.aspx> or  
<http://127.0.0.1/WS2012/default.aspx>

If you have previously worked with Web Suite on your computer, it will automatically open the database that you were in the last time you used the software. You can skip to **Log-in** below.

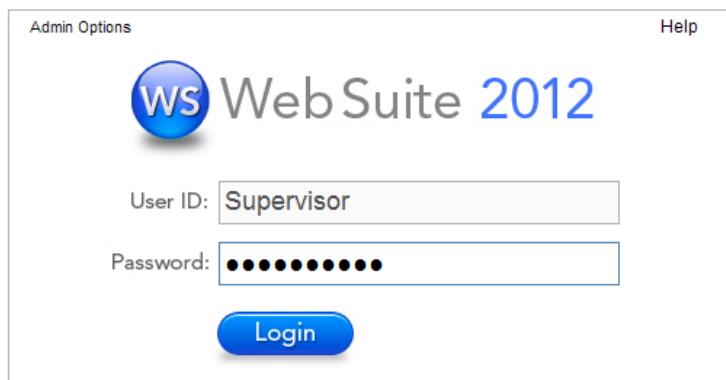
When you start Web Suite for the first time, it prompts you with some database options (See [Web Suite Database](#) above). Once you have successfully created a company database and security is turned on, you will be prompted for a login.

## Login

When security is turned on, Web Suite requires a User ID and Password for you to log in. Your BillQuick supervisor or administrator will provide you with an ID and password. For now, use these defaults:

User ID: supervisor  
Password: supervisor

After logging in, the Web Suite Home screen displays.



Admin Options Help

WS Web Suite 2012

User ID: Supervisor

Password: ●●●●●●●●●●

Login

# Navigation

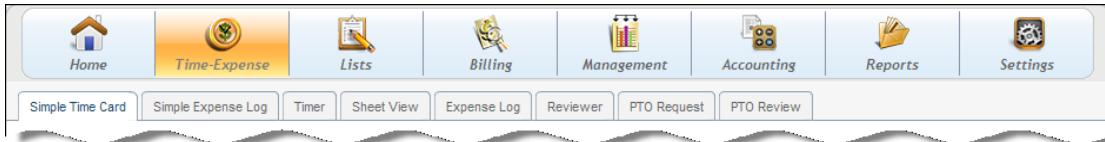
After logging in to Web Suite, you can access various functions and features of the application using the navigation options provided. There are actually two ways to navigate and use the application:

## Navigation Bar

Web Suite displays a navigation bar at the top that represents a major function of the application. Clicking each icon on the navigation bar displays tabbed screens grouping related or similar functions. E.g.,



Clicking **Time-Expense** on the navigation bar displays a group of tabbed screens like Simple Time Card, Timer, Expense Log, Reviewer, etc. You can click on each tab to view or enter data in each screen.



## Dashboard

The Home screen of Web Suite displays a dashboard with useful user-based information and links. You can access Quick Links to the frequently used features like Sheet View, Reports, Preferences, etc.; Help and other resources like Blog, website, etc.; How To links and index-based Search; workflow section with quick account summaries, submission alerts, reminders and messages received.

**Quick Links**

- [Sheet View](#)  
Enter time using advanced options
- [Simple Time Card](#)  
Effortlessly track a week's work for multiple projects
- [Expense Log](#)  
Track expense using advanced options
- [Simple Expense Log](#)  
Simple way to track weekly expenses
- [Reports](#)  
Run one or more reports from the reports library
- [User Preferences](#)  
Tweak Web Suite settings to your preferences
- [Messages](#)  
Exchange messages with other Web Suite and BillQuick Users

**Quick Summary**

Select: AM

Time Summary			Expense Summary		
	Billed	Unbilled		Billed	Unbilled
Today	0.00	9.00	Today	\$0.00	\$0.00
Weekly	0.00	45.00	Weekly	\$0.00	\$0.00
Bi-Weekly	0.00	48.00	Bi-Weekly	\$0.00	\$150.00
Month	0.00	48.00	Month	\$0.00	\$0.00

**Submitted Time, Expenses, Invoices & Purchase Orders**

- Submitted Time
  - Allen Marcello
    - Long Beach Harbor Terminal Bldg. 42 (15)
  - Bob Duncan
    - Hillard New Residence-CA (4.5)
    - Weed Wackers New System/Upgrade (1)
  - Bert Woolmer
    - Crystal Blue Waters Ongoing Support (1)
    - HUD Rio Site (2.25)
    - Company Overhead (8)
  - Curtis James
    - PV Country Club (7)
    - HUD Rio Site (6)
    - Weed Wackers New System/Upgrade (2)

**Useful Resources**

- [Help File](#)
- [Contact Support](#)
- [Support Downloads](#)
- [Training](#)
- [BillQuick Blog](#)

**Help**

Search Help....

**How To Links:**

- [Make Time Entry](#)
- [Make Expense Entry](#)
- [Approve Time/Expense Entries](#)
- [Restrict Time/Expense Entries](#)
- [Apply Report Filters](#)
- [Set Preferences](#)
- [Apply Filters](#)

**Reminders**

**Messages [0]**

# Master Information

Master information is the foundation of any time and billing system. This section covers the basics of master information maintained in Web Suite.

## Company Information

The Company screen contains a profile of your company. Information on this screen appears on reports and invoices.

1. After creating or selecting the database, the Company screen opens automatically (if it does not, click Settings on the navigation bar and select the Company tab).

The screenshot displays the 'Company' information screen. At the top, there is a navigation bar with tabs: Preferences, Global Settings, Company, Security, Manage Web Users, Custom Labels, Log Viewer, Password, Change ID, Re-Assign, and Auto Complete. Below the navigation bar, the 'Company' title is shown with a 'Current Logged In Users' indicator. A toolbar contains buttons for 'Click here to License and Register', 'Help', 'Add Logo', 'Remove Logo', 'Save', and 'Close'. The main form area is divided into several sections:

- Name:** Hendricks Consulting LLC
- Address:** 2601 Airport Drive, Suite 380
- City:** Los Angeles, **State:** CA
- Zip:** 90505, **Country:** USA
- Phone:** 3105551212, **Fax:** 3105552121
- Email:** admin@hendricks\_consulting.com
- Web:** www.hendricks\_consulting.com
- Tax ID:** 011234567, **Employer ID:** 017654321
- Country(Currency):** (Dropdown menu)
- Custom 1:** Enter any custom info here...
- Custom 2:** (Empty field), **Custom 3:** (Empty field)
- Custom 4:** (Empty field), **Custom 5:** (Empty field)
- Message On Invoice:** Thank you for your business!
- Taxes:** Main Service Tax: 0%, Main Expense Tax: 0%
- FY Begin Date:** 1/1/2012
- FY End Date:** 12/31/2012
- Closing Date:** 12/31/2011
- Logo:** A square logo with a stylized 'H' inside.



## Master Information

2. Enter your company Name, Address, and all other relevant contact information in the appropriate fields.
3. When finished, click Save and then Close to exit.

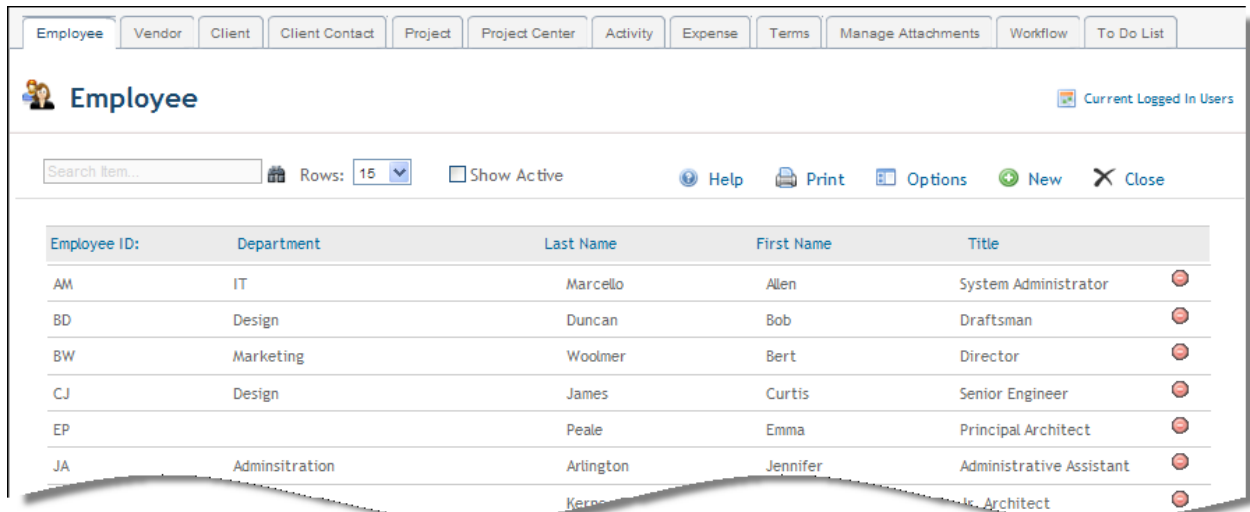
Your company information is now saved in the database. Let's look at the employee profile.

## Employee Information

Employee screen represents a profile of a person working in a company on various activities and projects. This screen lets you add and edit employee-related data. Employee information prints on reports and invoices. Also, each employee has a default bill rate and cost rate that can be used when recording time entries or preparing budgets.

To create an employee profile:

1. Click Lists on the navigation bar and choose the Employee tab.
2. On the Employee screen, you can view the list of existing employee records in the Web Suite database.



Employee ID:	Department	Last Name	First Name	Title	
AM	IT	Marcello	Allen	System Administrator	⊘
BD	Design	Duncan	Bob	Draftsman	⊘
BW	Marketing	Woolmer	Bert	Director	⊘
CJ	Design	James	Curtis	Senior Engineer	⊘
EP		Peale	Emma	Principal Architect	⊘
JA	Adminsitration	Arlington	Jennifer	Administrative Assistant	⊘
		Kern		Architect	⊘

3. Click New to open the Employee screen in a detail view where you can enter information for a new employee.
4. The cursor will default to the Employee ID field on the General tab. Enter the Employee ID using numbers, letters or a combination of both (up to 65 characters).

## Master Information

Employee Vendor Client Client Contact Project Project Center Activity Expense Terms Manage Attachments Workflow To Do List

Employee Current Logged In Users

Filters (On/Off) Help Print Options Attachments Clone Group Save New Return

General Rate Detail Tax Allowance Assign Performance Previous Next

Employee ID: MK Salutation: Mr. First Name: Mark MI: Last Name: Kerns

SSN: 555-66-9999 Role: Default Submit To: Anyone

Department: Rendering Title: Jr. Architect Security: Custom

Manager: Filters... Status: Active Login: MK

Default Group: ALL

Street 1: 23 Dogwood Avenue Street 2: City: Lomita

State: CA Zip: 90700 Country:

Phone: (310) 555-9966 Ext: Fax: (310) 555-6699

Mobile No: Email:

Custom 1: Enter extra info here Custom 2:

Memo: Enter unlimited length memo here... 3/6/2012 1:16 PM  Web User  BillQuick User

5. Enter other relevant and required data such as First/Last Name, address details, etc. Press the Tab key to move from field to field or click on the next field.
6. Now, click on the Rates tab. In the Hourly Rate section, enter the default Bill Rate and Pay Rate for the employee.
7. If desired, enter information on the other tabs as well.
8. When you are done, click Save and then Return to exit.



Similarly, you can create a vendor or sub-contractor profile in the Vendor screen.

## Client Information

The Client screen lets you maintain customer profiles, billing addresses and contacts per client. It also provides detailed information about client accounts, invoices and payments.

To create a client profile:

1. Click Lists on the navigation bar and choose the Client tab.

## Master Information

2. On the Client screen, you can view the list of existing client records in the Web Suite database.
3. Click New to open the Client screen in the detail view where you can enter information for a new client.

Employee Vendor **Client** Client Contact Project Project Center Activity Expense Terms Manage Attachments Workflow To Do List

**Client** Current Logged In Users

Filters (On/Off) Help Print Options Attachments Clone Group Save New Return

General Billing Details Account **History** Previous Next

Client ID: LA DWP Company: Dept. Water & Power  Auto Add New Project

Client Manager: AM Filter...

Client Since: 11 9 2010 Status: Active

Default Group: ALL

**Contact Info:**

Street: 123 Main Street Country: USA

Suite 300 City: Sunndayle Tel: (310) 555-1212

State: CA Zip: 90500 Fax: (310) 555-2121

Web: <http://www.dwp.com> Email: [Jon@dwp.com](mailto:Jon@dwp.com) Custom1: Enter extra info here...

Custom2:

Memo: Enter unlimited length memo here... 3/6/2012 1:20 PM

4. The cursor is automatically placed in the Client ID field on the General tab. Enter the Client ID using letters or numbers.
5. Enter other relevant data such as Contact Info, etc. Press the Tab key to move from field to field or click on the next field.
6. If desired, enter information on the other tabs as well.
7. When you are done, click Save and then Return to exit.

## Project Information

Using the Project screen, you can create and maintain project or job profiles that you work on. Project information affects how data is processed and flows to various reports and invoices.

To create projects:

1. Click Lists on the navigation bar and choose the Project tab.

## Master Information

2. On the Project screen, you can view the list of existing project records in the Web Suite database.
3. Click New to open the Project screen in the detail view where you can enter information for a new project.

The screenshot shows the 'Project' master information form. At the top, there are navigation tabs: Employee, Vendor, Client, Client Contact, Project (selected), Project Center, Activity, Expense, Terms, Manage Attachments, Workflow, and To Do List. Below the tabs is the 'Project' title and a 'Current Logged In Users' indicator. A toolbar contains icons for Filters (On/Off), Help, Print, Options, Attachments, Clone, Group, Save, New, and Return. The form has several tabs: General (selected), Billing, Details, Templates, Accounts, History, and Assign. The 'General' tab contains the following fields and controls:

- Project ID: 09-PV Country Club: [Create Phase button]
- Name: PV Country Club
- Status: Active (dropdown)
- Client: Allied Tech (with search icon)
- Manager: JA (with search icon)
- Type: Hourly Not to Exo (dropdown)
- Contract Details:
  - Contract Amt: \$80,000.00
  - %Complete: 20
  - PO Number: [empty]
  - Service Amt: \$80,000.00
  - Project Settlement %: 0
  - Start Date: 10/13/2010 (dropdowns)
  - Exp Amt: \$0.00
  - Due Date: MM/DD/YYYY (dropdowns)
- Address Details:
  - Use Client Address
  - Street 1: 1616 Adventure Way
  - Street 2: [empty]
  - State: CA
  - Zip: 95000
  - Country: USA
  - City: Sunnyside
- Custom:
  - Custom 1: Enter extra text
  - Custom 2: [empty]
  - Custom 3: [empty]
  - Custom 4: [empty]
- Memo: Enter unlimited length memo here... 3/6/2012 1:29 PM [Journal icon]

4. The cursor is automatically placed in the Project Code field on the General tab. Enter the Code and Phase (if you want to break down this project into phases and segments).



When you save the project, Web Suite automatically combines the Code and Phase into a single Project ID.

5. Enter other required and relevant data such as Name, Client, Manager, Status, Address Details, etc.
6. In the Type field, select the type of contract used for this project (hourly, fixed, cost plus, etc.). If a fixed contract type is selected, be sure to fill in the Contract Details. Move from field to field by pressing the Tab key or clicking on the next field.
7. If desired, enter information on the other tabs as well.
8. When you are done, click Save and then Return to exit.

# Activity Codes

On the Activity screen, you can create and maintain a list of standard activities or tasks. Activity codes are required to record time entries to a project and this information flows to the invoices and reports.

To create activity codes:

1. Click Lists on the navigation bar and choose the Activity tab.
2. On the Activity screen, you can view the list of existing activity records in the Web Suite database.
3. Click New to open the Activity screen in the detail view where you can enter information for a new activity code.

4. The cursor will default to the Code field. Enter the desired Code and, optionally, Sub (sub-code).
5. Enter other relevant and required data such as Description, Cost Rate, Bill Rate, Tax, etc for the activity.
6. Make sure the Billable option is checked for each billable activity.
7. When done, click Save and then Return to exit.



You can also create expense codes in the Expense screen.

# Time and Billing

This section focuses on time entry and billing capabilities of Web Suite. It helps you to understand the basics of how to enter, edit and review time entries and how to bill them effectively.

## Time Entry

To enter and review time entries, you have three time entry options in Web Suite:

- Simple Time Card
- Timer
- Sheet View



All time entries are saved in the same database. You can edit and review entries on the Sheet View and Simple Time Card.

To record time entries using the Simple Time Card:

1. Click Time-Expense on the navigation bar and choose the Simple Time Card tab.

The screenshot shows the 'Simple Time Card' interface. At the top, there are navigation tabs: Simple Time Card, Simple Expense Log, Timer, Sheet View, Expense Log, Reviewer, PTO Request, and PTO Review. Below the tabs, the title 'Simple Time Card' is displayed along with 'Current Logged In Users'. A toolbar contains icons for Copy, Help, Print, Options, Submit All, New, Save, and Close. Below the toolbar, there are filters for 'View By' (Employee), 'Employee' (AM), 'Filters', and 'Period Including: -- Today ++'. The main area is a table with columns for Project ID, Activity ID, Description, and days of the week (Mon 5, Tue 6, Wed 7, Thu 8, Fri 9, Sat 10, Sun 11), plus a Total column. The table contains 11 rows of data. At the bottom, a summary box shows: Billable Hours = 22, Non Billable Hours = 23, Billable Percentage = 48.8%, and Total Hours = 45.00.

Project ID	Activity ID	Description	Mon 5	Tue 6	Wed 7	Thu 8	Fri 9	Sat 10	Sun 11	Total
10-BQE General:	Prelim Design:	Preliminary Design	8		6					14.00
10-DWP:	Marketing:	Marketing/Sales		4						4.00
10-Green Thumb:	Accounting:	Accounting	1	1	1	1	1			5.00
10-Harbor Terminal Bldg 1:	Web Serv:	Web Services		4		8	8			20.00
10-Torrance Airport:	Conf Call:	Telephone Call/Conference			2					2.00
10-Harbor Bldg 1:	Conf Call:	Telephone Call/Conference								0.00
10-Harbor Terminal Bldg 1:	CMR:	Computer Maintenance/Repair								0.00
10-Torrance Airport:	Prelim Design:	Preliminary Design								0.00
10-Torrance Airport:	Liaison:	Liason/Coordination								0.00
10-Torrance Airport:	System Ins:	Computer System Installation								0.00
			9.00	9.00	9.00	9.00	9.00			45.00

Billable Hours = 22      Non Billable Hours = 23      Billable Percentage = 48.8%      Total Hours = 45.00

2. On the Simple Time Card screen, you can view the list of existing weekly time entries in the Web Suite database.
3. Click New to open the Simple Time Card in the entry view where you can record a new time entry.
4. Select View By: Employee or Vendor (Sheet View lets you view entries by Project also).
5. Select the desired Employee from the list.
6. Next, select the Period Including date (week) for which you want to record hours. If any time was recorded in that week, it displays automatically.
7. Enter or select the desired Project ID and Activity ID against which you want to record time.
8. Press the Tab key to move from field to field.



Whether or not a time entry is billable depends on the default value that is assigned to the activity in the Activity Codes screen (see *above*).

9. Enter the amount of time spent (in hours) on the project in the desired day/date field. Use decimals if needed.
10. To add a memo, click Options and check Show Memo. Click the desired cell and type your notes in the floating memo box. Enter as much text as you wish.



Depending on the invoice format chosen, a time entry memo can appear on your invoices. Memos also print on various reports.

11. When you are done, click Save and then Return to exit.



Similarly, you can record expense entries in the Expense Log or Simple Expense Log screen.

## Billing

Web Suite lets you quickly generate invoices by client, project, manager, contract type and by whatever billing period you wish in the Billing Review screen. You can then display as much or as little detail as you wish on your invoices when you print and mail and/or email them to your clients.

To generate invoices:

1. Click Billing on the navigation bar and choose the Billing Review tab.
2. On the Billing Review screen, select the desired View By option, say Client. You can also select other options.
3. Using the From-To fields, select a client or range of clients.


## Time and Billing

**Billing Review** Current Logged In Users

Filters (On/Off) Help Print Draft Process Close

View By: Client From: Allied Tech To: Widgets Inc Filters As Of: 1/1/2020 Refresh

J	Project ID	Hrs	Billable	Expenses	Discount	Retainer	Net Bill	Bill	% Complete	Invoice Date			
<input type="checkbox"/>	09-PV Country Club:	9.00	\$1,090.00	\$12.50	\$0.00	\$0.00	\$1,102.50	<input type="checkbox"/>	0	3/6/2012	<input type="checkbox"/>	\$	<input type="checkbox"/>
<input type="checkbox"/>	10-City Health Dept:	0.00	\$0.00	\$87.14	\$0.00	\$0.00	\$87.14	<input type="checkbox"/>	0	3/6/2012	<input type="checkbox"/>	\$	<input type="checkbox"/>
<input type="checkbox"/>	10-Fun Foods:	20.00	\$3,000.00	\$0.00	\$0.00	\$0.00	\$3,000.00	<input type="checkbox"/>	0	3/6/2012	<input type="checkbox"/>	\$	<input type="checkbox"/>
<input type="checkbox"/>	10-Green Thumb:	71.50	\$5,768.75	\$90.00	\$0.00	\$0.00	\$2,090.00	<input type="checkbox"/>	0	3/6/2012	<input type="checkbox"/>	\$	<input type="checkbox"/>
<input type="checkbox"/>	10-Harbor Bldg 1:	22.00	\$1,748.75	\$289.01	\$0.00	\$0.00	\$2,037.76	<input type="checkbox"/>	0	3/6/2012	<input type="checkbox"/>	\$	<input type="checkbox"/>
<input type="checkbox"/>	10-Harbor Terminal Bldg 1:	20.00	\$1,600.00	\$0.00	\$0.00	\$0.00	\$1,600.00	<input type="checkbox"/>	0	3/6/2012	<input type="checkbox"/>	\$	<input type="checkbox"/>
<input type="checkbox"/>	10-HUD Add Services:	0.00	\$0.00	\$279.00	\$0.00	\$0.00	\$279.00	<input type="checkbox"/>	0	3/6/2012	<input type="checkbox"/>	\$	<input type="checkbox"/>
			\$2,485.00	\$0.00	\$0.00					3/6/2012	<input type="checkbox"/>	\$	<input type="checkbox"/>

4. Use the Period drop-down list to select your billing period. You can call up information by month, day or any other time period you wish, such as All.
5. After setting the filters, click Refresh. Web Suite displays all billing records that meet your criteria.
6. Review all entries before continuing. To view the billing details, click  on the desired row.
7. The amount in the Net Bill column is the amount *to be billed* on the invoice. Depending on the contract type you chose for the project, the Net Bill amount may be the total of time and expenses charged to the project, a fixed fee amount, a scheduled bill amount, a recurring amount or a percent complete computation.

You can adjust the Net Bill amount by applying a Discount, Retainer on account, or you can manually change the amount to any value.

8. To process a billing record into an invoice, check its Bill option and then click Process. If you want to produce a draft invoice, click Draft instead. The billing record(s) disappear and move to the Invoice Review screen.
9. When done, click Return to exit.

Now you are ready to review and print your invoices before sending them to your clients.

## Invoices

From the Invoice Review screen, you can review invoices, finalize draft invoices and print them. Invoices created using the Billing Review or Manual Invoice screens display in the Invoice Review grid.

To review and print your invoices:



## Time and Billing

1. Click **Billing** on the navigation bar and choose the **Invoice Review** tab.
2. The top panel of the **Invoice Review** screen provides various filters for selective viewing of the invoices. For now, do not apply any filter and click **Refresh**.

<input type="checkbox"/>	Invoice #	Date	Project ID	Project Name	Net Amount	Paid	Balance	Client ID	V	Journal	Invoice Template
<input type="checkbox"/>	1124	3/1/2012	10-Dept Of City Services:	Dept. of City Services	\$17.50	\$0.00	\$17.50	City Services	<input type="checkbox"/>	Journal	Hourly Invoices!Hc
<input type="checkbox"/>	1123	2/9/2012	10-CBS Support:	Crystal Blue Waters Ongoing Support	\$5,685.00	\$0.00	\$5,685.00	County	<input type="checkbox"/>	Journal	Hourly Invoices!Hc
<input type="checkbox"/>	1122	2/9/2012	10-Hillard:1-SD	Hilliard Residence-Schematic Design	\$1,160.00	\$200.00	\$960.00	HILLARD	<input type="checkbox"/>	Journal	Manual Invoices!n
<input type="checkbox"/>	1121	2/9/2012	10 Municipal 3:	Municipal Offices Technical Support	\$2.71	\$0.00	\$2.71	County	<input type="checkbox"/>	Journal	Manual Invoices!n



If you created a draft invoice, check the **Draft** checkbox and then refresh the screen.

3. Find the invoice generated in the last procedure (**Billing Review**) and then select it by selecting the checkbox to the left of it.
4. Click **Print** to preview, print or email the invoice.
5. When done, click **Close** to exit.

## Payment

The **Payment** screen lets you apply and record payment information, as well as review previously recorded payments. When recording payments, you can distribute the payment among multiple invoices on either a client or project basis.

To apply payments:

1. Click **Billing** on the navigation bar and choose the **Payments** tab.

2. On the Payment screen, select your View By mode, say Client, and the desired Client ID

Apply	Amount Applied	Project ID	Invoice No	Invoice Date	Net Bill	Paid	Balance	Foreign	Journal
<input type="checkbox"/>	0	10-Torrance Airport:	1034	11/14/2011	\$8,508.75	\$8,300.00	\$208.75	\$208.75	Journal
<input type="checkbox"/>	0	10-Torrance Airport:	1043	12/23/2011	\$2,250.00	\$0.00	\$2,250.00	\$2,250.00	Journal
<input type="checkbox"/>	0	10-Torrance Airport:	1049	12/23/2011	\$480.00	\$0.00	\$480.00	\$480.00	Journal
<input type="checkbox"/>	0	10-Torrance Airport:	1051	1/14/2012	\$2,130.00	\$0.00	\$2,130.00	\$2,130.00	Journal
<input type="checkbox"/>	0	10-Torrance Airport:	1055	2/15/2012	\$240.00	\$0.00	\$240.00	\$240.00	Journal

3. Select the Date and Pay Method to be used for recording payments.
4. Enter the total payment in the Amount field. This payment can be applied to more than one invoice.
5. Now decide which invoices should receive payment. Select the Auto Apply option to let Web Suite automatically apply the payment to the invoices, oldest to new. Or manually enter the amount in the Amount Applied field in the grid and check the Apply box.



Web Suite automatically updates the balance due for the listed invoices as you apply the payment.

6. When you are done, click Save and then Close to exit.

# Reports

Reports compile and present recorded and processed information. Web Suite includes more than 400 reports and 150 invoice templates, each with filter options that allow you to precisely review the information you need.

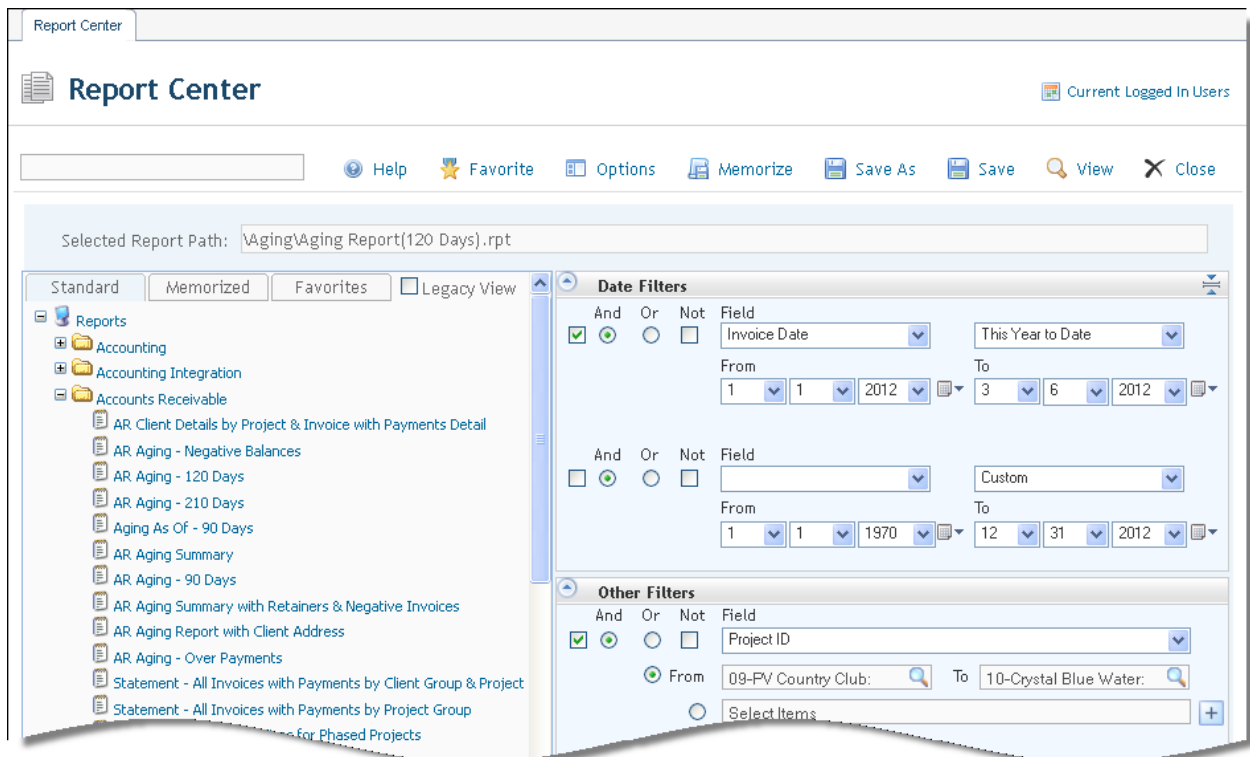
BQE Software develops all reports using Crystal Reports Writer, the most widely used report writer software. Also, all your reports and invoice formats can be customized by BQE Reports Team.

## Web Reports

Reports contain information to help you understand what exists in your company database, what is due to you, the status of work being performed, utilization of resources, unbilled and billed work, and much more. Reports can be produced directly from the screens (in-context reports) or from the Report Center screen.

To view or print a report:

1. Click Reports on the navigation bar. It displays the Report Center screen.
2. On the Standard reports tab, select a report from the category tree. The screen displays the Selected Report Path.



## Reports

You can check the Legacy View option to view the standard report list accordingly to the older/traditional categorization.

3. Apply Date or Other Filters by choosing the Field and From-To options to view selective information on the report.
4. You can also apply More and Group Filters by selecting them at the bottom.
5. Once you have applied the desired filters, preview the report by clicking View.

**Report Viewer**

Sort Report: Client ID Total Records: 9

Find... 1 of 1 | 100%

**Main Report**

**Hendricks Consulting LLC**  
 2601 Airport Drive, Suite 380  
 Los Angeles, CA 90505  
 Tel: 310-555-1212 Fax: 310-555-2121  
 admin@hendricks\_consulting.com  
 www.hendricks\_consulting.com

**AR Aging - 120 Days**  
 Printed on: 3/6/2012  
 Page 1 of 1

Filters Used:  
 - Invoice Date: 1/1/2012 to 3/6/2012  
 - Project ID: 09-PV Country Club: to 10-Crystal Blue Water:

**Allied Technology (Allied Tech) Lynn Tracey 606-555-1212**

**PV Country Club (09-PV Country Club) - Managed by (JA)**

Inv Num	Date	Bill Amt	Paid	Current to 60	61 to 90	91 to 120	>=120	Balance
1119	3/1/2012	\$4,646.95	\$3,835.46	\$811.49	\$0.00	\$0.00	\$0.00	\$811.49
<b>Project (09 - PV Country Club:) Balance</b>				\$811.49	\$0.00	\$0.00	\$0.00	\$811.49
<b>Client (Allied Tech) Balance</b>				\$811.49	\$0.00	\$0.00	\$0.00	\$811.49

**County Municipal Offices (County) Tracy Hunter 310-555-3322**

**Municipal Offices Technical Support (10 Municipal Offices - 3) - Managed by (JA)**

Inv Num	Date	Bill Amt	Paid	Current to 60	61 to 90	91 to 120	>=120	Balance
1120	2/24/2012	\$3,306.25	\$0.00	\$3,306.25	\$0.00	\$0.00	\$0.00	\$3,306.25
1121	2/9/2012	\$2.71	\$0.00	\$2.71	\$0.00	\$0.00	\$0.00	\$2.71
<b>Project (10 Municipal Offices - 3:) Balance</b>				\$3,308.96	\$0.00	\$0.00	\$0.00	\$3,308.96

**Crystal Blue Waters Ongoing Support (10-CBS Support) - Managed by (GAB)**

Inv Num	Date	Bill Amt	Paid	Current to 60	61 to 90	91 to 120	>=120	Balance

6. You can print or export the report (as a PDF file or any other format like Excel and Word), navigate to the previous/next report page or view the first/last page of the report.
7. When you are done, click Return to exit.

*Congratulations!* You have successfully installed Web Suite and have familiarized yourself with its basic functionality. To learn more about this program, check the Web Suite Help or visit [www.bqe.com/Products](http://www.bqe.com/Products).

For more information, visit us at [www.bqe.com](http://www.bqe.com). If you have any trouble in using Web Suite, please contact BillQuick Support at (310) 602-4030 or [Support@bqe.com](mailto:Support@bqe.com). For other questions, please call us at (888) 245-5669 (US and Canada) or (310) 602-4020; or email [Sales@bqe.com](mailto:Sales@bqe.com).