Getting Started Guide

BillQuick

Web Suite Getting Started Guide

Built With Your Industry Knowledge

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Introduction

Welcome to Web Suite from **BQE Software.**

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 computer, 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 for more*.

Web Suite Setup Checklist

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

System Requirements

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

Server Requirements

Here are the hardware and software requirements of the server machine for hosting Web Suite.

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

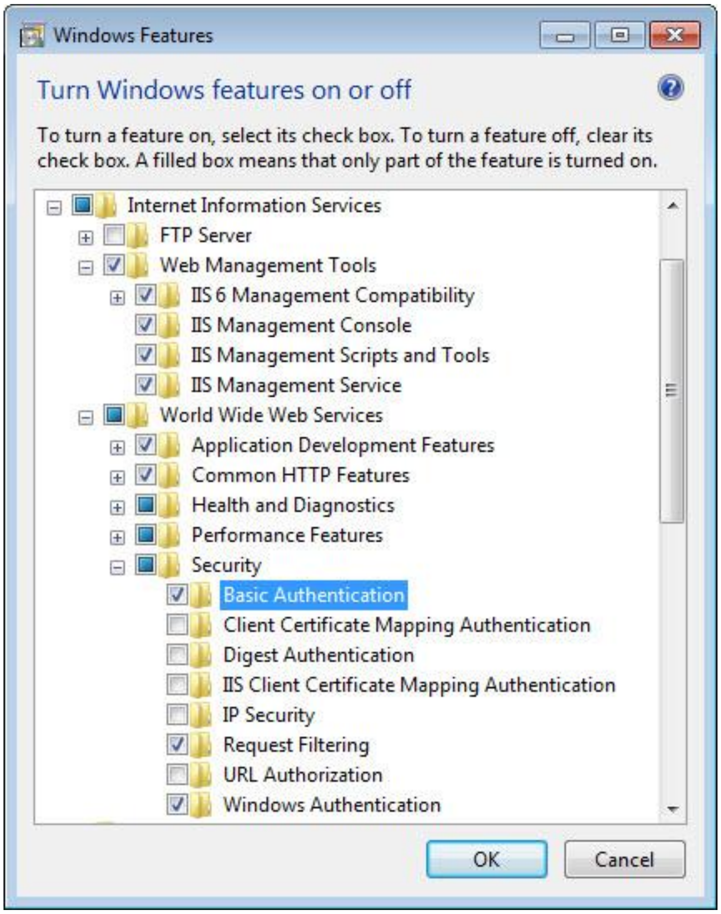
Be sure your network server contains sufficient memory and other resources for efficient, high speed operation.

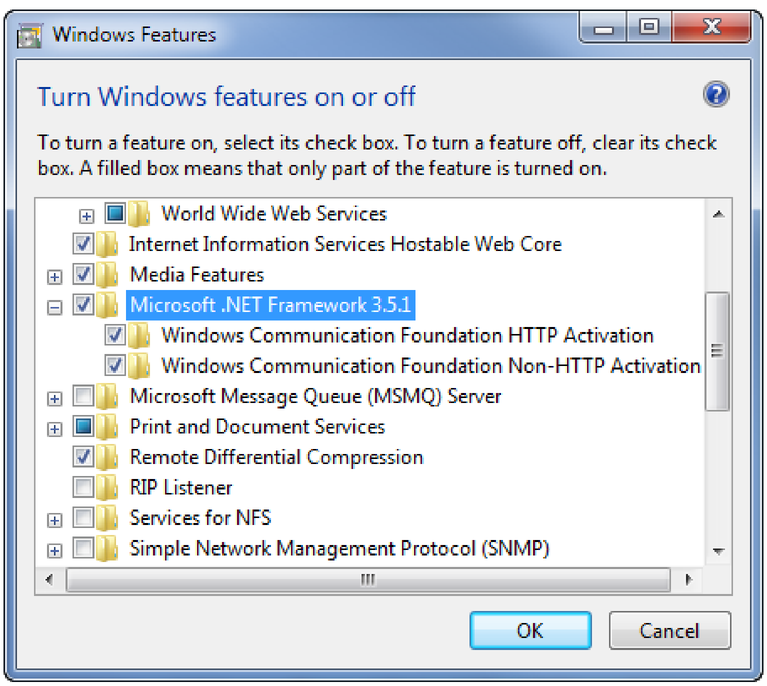
Software Requirements

Operating System Requirements

- Windows 8, Windows 7 (Business or Ultimate), Windows Server (2012, 2008 or 2003), 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)
- Microsoft SQL Server 2008 R2, SQL Server 2008, SQL Server 2005, Microsoft Small Business Server (2011 or 2008)

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


Windows Features
Turn Windows features on or off
To turn a feature on, select its check box. To turn a feature off, clear its check box. A filled box means that only part of the feature is turned on.
Internet Information Services
FTP Server
Web Management Tools
IIS 6 Management Compatibility
IIS Management Console
IIS Management Scripts and Tools
IIS Management Service
World Wide Web Services
Application Development Features
Common HTTP Features
Health and Diagnostics
Performance Features
Security
Basic Authentication
Client Certificate Mapping Authentication
Digest Authentication
IIS Client Certificate Mapping Authentication
IP Security
Request Filtering
URL Authorization
Windows Authentication
OK
Cancel


Windows Features
Turn Windows features on or off
To turn a feature on, select its check box. To turn a feature off, clear its check box. A filled box means that only part of the feature is turned on.
World Wide Web Services
Internet Information Services Hostable Web Core
Media Features
Microsoft .NET Framework 3.5.1
Windows Communication Foundation HTTP Activation
Windows Communication Foundation Non-HTTP Activation
Microsoft Message Queue (MSMQ) Server
Print and Document Services
Remote Differential Compression
RIP Listener
Services for NFS
Simple Network Management Protocol (SNMP)
OK
Cancel

Client/Workstation Requirements

Here are the hardware and software requirements of the client machine for running Web Suite.

Hardware Requirements

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

Software Requirements

- Windows 8, Windows 7, Windows Vista, Windows XP, Windows 2000, 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 website 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

Web Suite 2013 is a server-based program requiring one machine to function as a 'web server' and 'data server' that can host both Web Suite web program and web data. (Note: Web Suite system can be hosted on two servers one can be dedicated for web program 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), which is 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

Preparing for Installation

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).

   Please see the instructions on how to install SQL Server 2008 R2 on the Microsoft Developer Network (MSDN) site.

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:

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

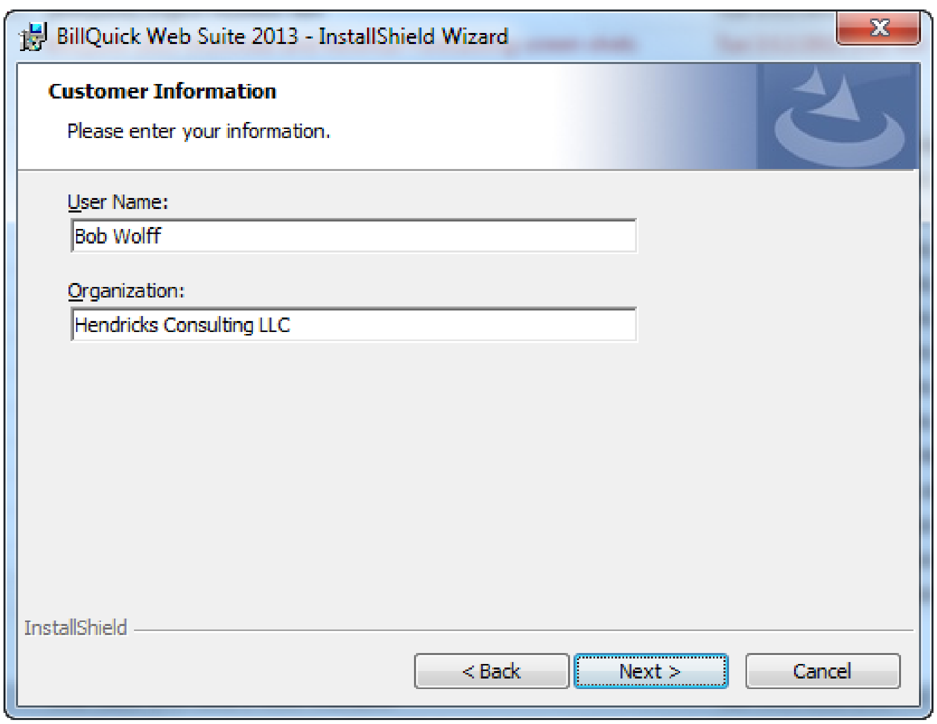
Installing Web Suite

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.

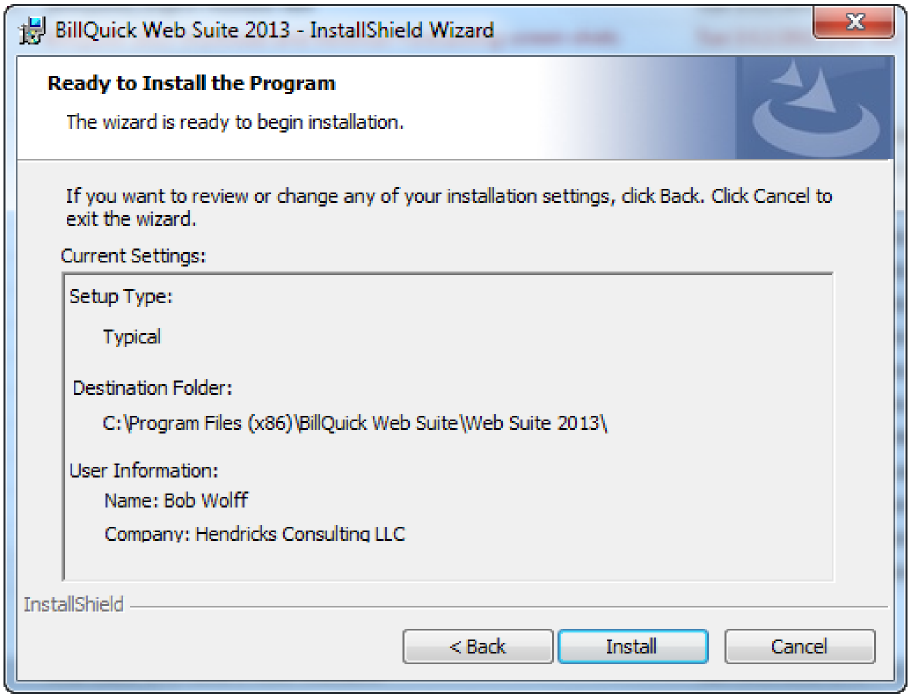
Follow the steps below to install Web Suite on your server.

1. After downloading and extracting Web Suite 2013 from the archive, navigate to the folder where you placed the extracted files. Double-click on WS2013Setup.exe.
2. When the BillQuick Web Suite 2013 Install Shield Wizard displays, read the information and follow the instructions on each page. Click Next.

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. After the installation begins, a progress bar displays. When the Finished page appears, click Finish.
6. After installation is complete, you are prompted by a dialog box. If the dialog box does not display, click the Web Suite 2013 desktop shortcut.

   You can also open the Internet browser and type the URL (uniform resource locator) of your website:

   http://www.MyDomain.com/WS2013/default.aspx
   MyDomain.com is your website domain name. Alternatively, you may use the IP address (local host or computer name) of the server, say:

   http://192.168.1.45/WS2013/default.aspx or
   http://computername/WS2013/default.aspx or
   http://localhost/WS2013/default.aspx or
   http://127.0.0.1/WS2013/default.aspx

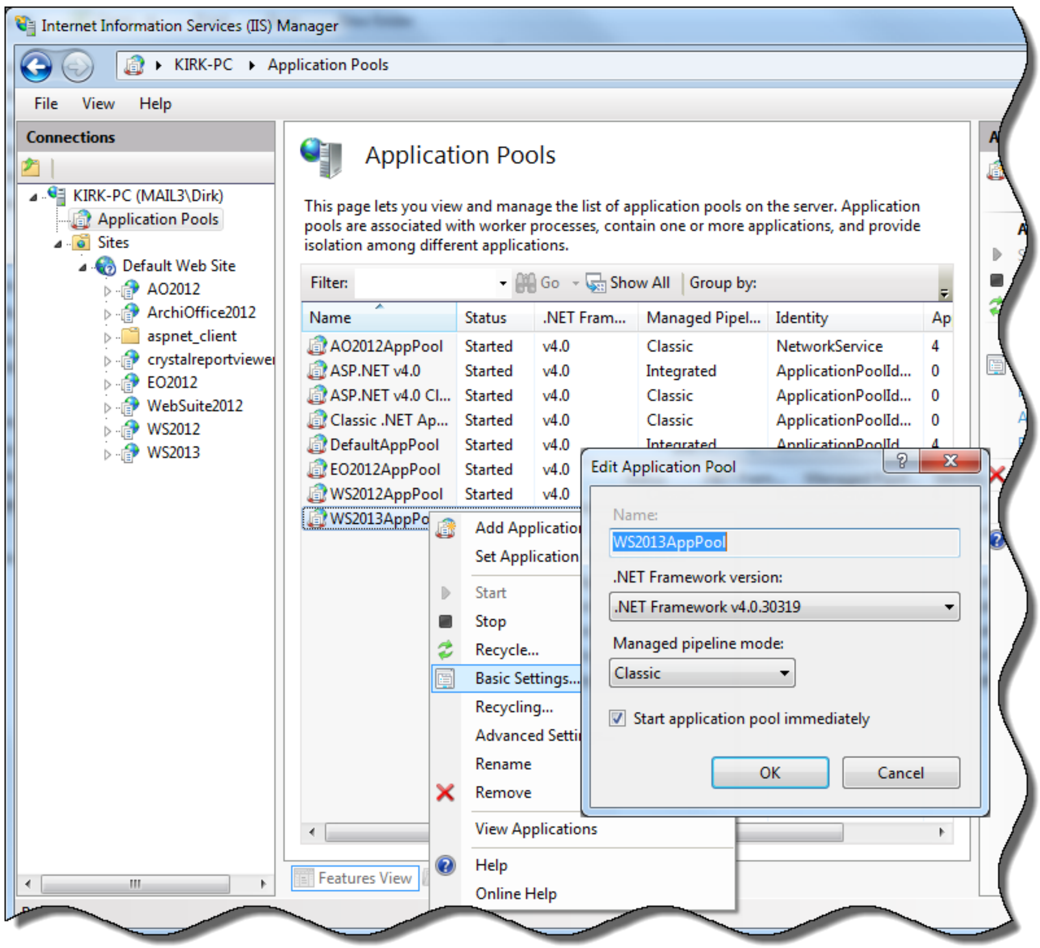
Advanced Installation

By default, the setup process for Web Suite creates the WS2013 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 WS2013 and assigns Windows Authentication to it.

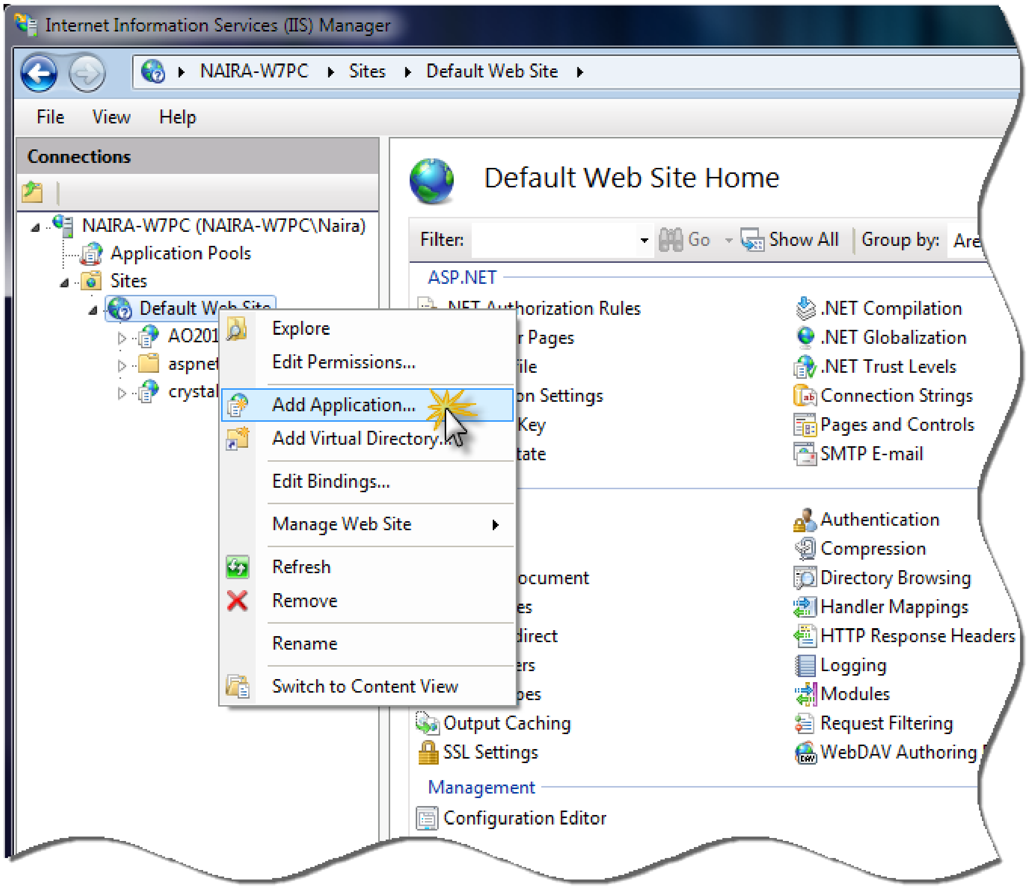
If you are using IIS 6.0 or lower, use Virtual Directory instead of Application.

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

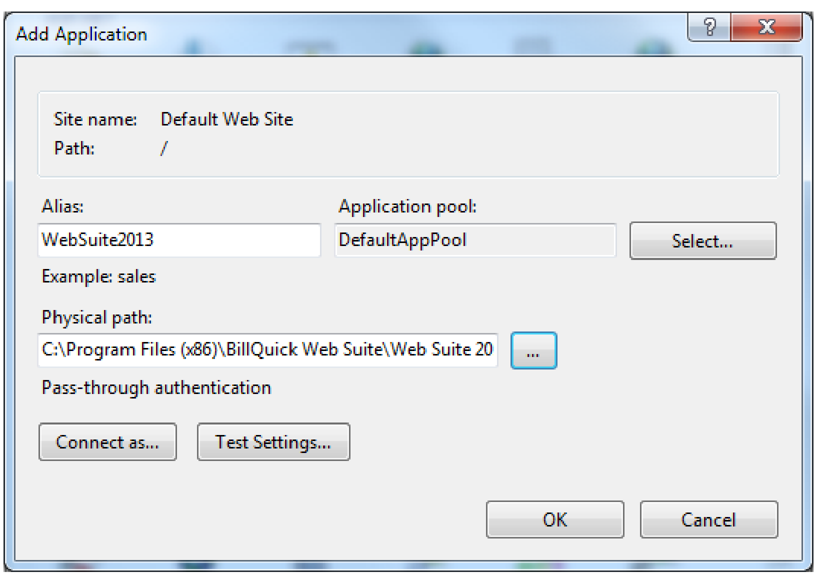
1. Go to Start > Control Panel > System and Security > Administrative Tools > Internet Information Services (IIS) Manager.
2. On the left panel, select Application Pools. You can create a new Application Pool, for instance, AO2013AppPool.
3. On the right panel, right-click on WS2013AppPool and select Basic Settings.



4. By default, the Name of the application pool is WS2013AppPool but you can change it. Make sure the .NET Framework version selected is 4.0.30319 and Managed Pipeline Mode is Classic.
5. Click OK and then close.
6. Now right-click on WS2013AppPool 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 then close.
8. Under Sites, right-click on your Default Web Site (or your preferred website) and select Add Application.

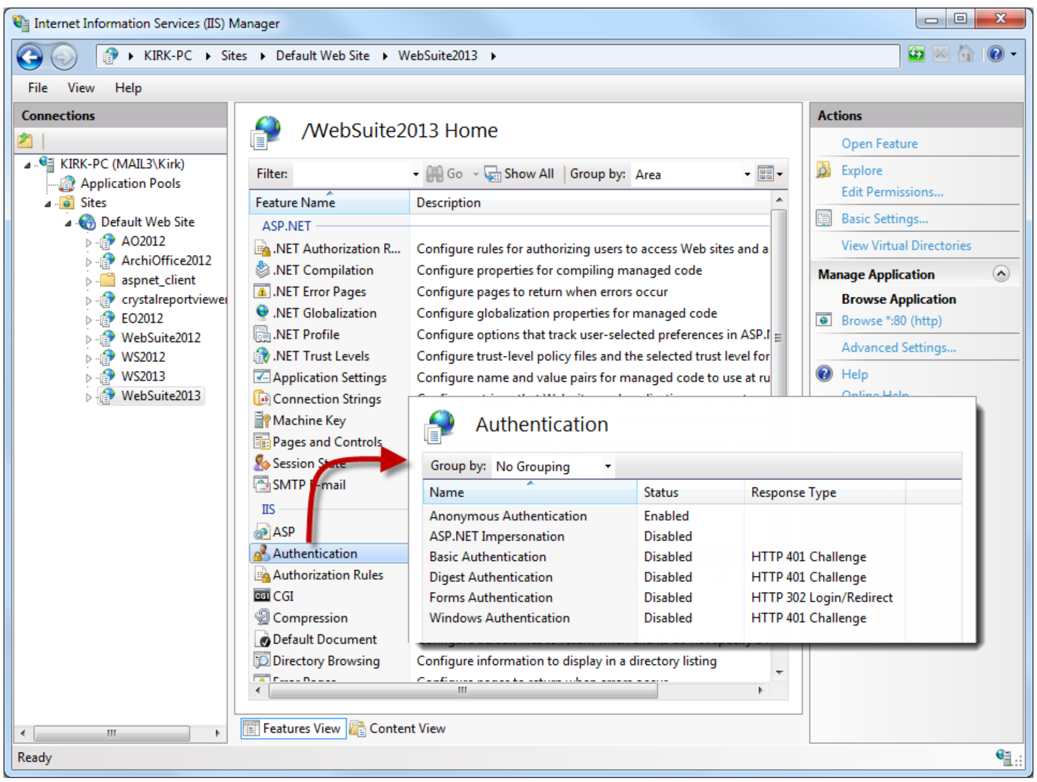


9. In the Add Application dialog box, enter *WebSuite2013* (or any other name) as an alias for the program.



10. Check the Application Pool (for example, WS2013AppPool) 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 website files. Typically, public component files are in the C:\Program Files (x86)\BillQuick Web Suite\Web Suite 2013\public folder. Click OK.
12. Right-click on WebSuite2013 and select Add Application.
13. Enter Admin as an alias for the program.
14. Enter the Physical Path or browse to the folder containing the Web Suite admin website files. Typically, admin component files are in the C:\Program Files (x86)\BillQuick Web Suite\Web Suite 2013\admin folder. Click OK.
15. Enter Bqoapi2 as an alias for the program so as to use the mobile apps.
16. Enter the Physical Path or browse to the folder containing the Web Suite BQOAPI2 website files. Typically, BQOAPI2 component files are in the C:\Program Files (x86)\BillQuick Web Suite\Web Suite 2013\ BQOAPI2 folder. Click OK.
17. Now select WebSuite2013 program on the left panel. On the middle panel under IIS, open or double-click Authentication.



18. Make sure Anonymous Authentication is enabled here while the other options are disabled.
19. Next, select WebSuite2013 > Admin program on the left panel. On the right panel under IIS, open or double-click Authentication.
20. 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 [Knowledge Base Articles](). For additional help, contact us at (800) 371-0130 (ext#0) or support@bqe.com.

Start-Up

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 computer.

Setting Up Web Suite Database

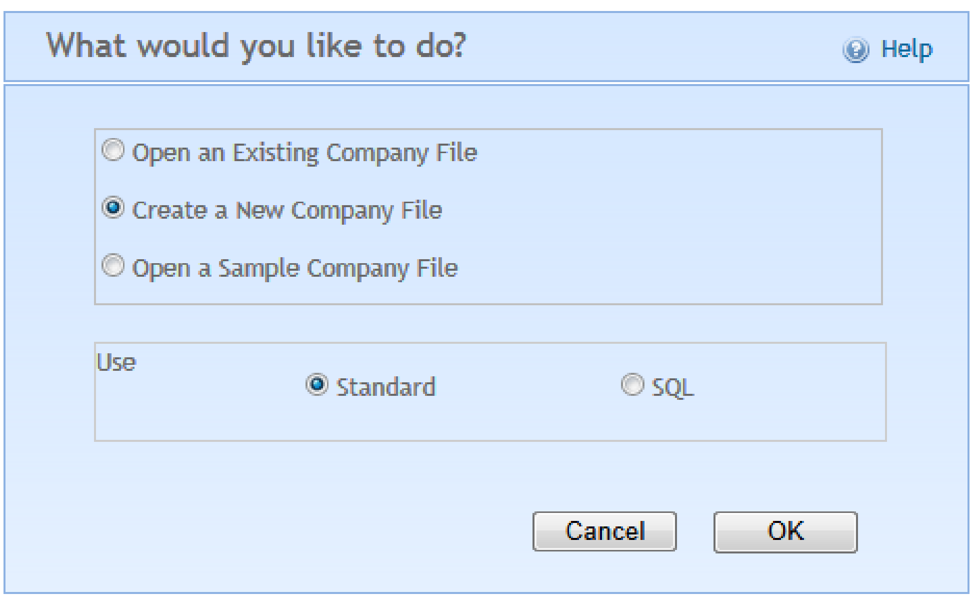
When Web Suite opens for the first time, it prompts you with the 'What would you like to do?' dialog box. You can open an existing company file, sample company file or create a new one. If the database created in BillQuick already exists, you can open it with Web Suite. You can open or create a database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

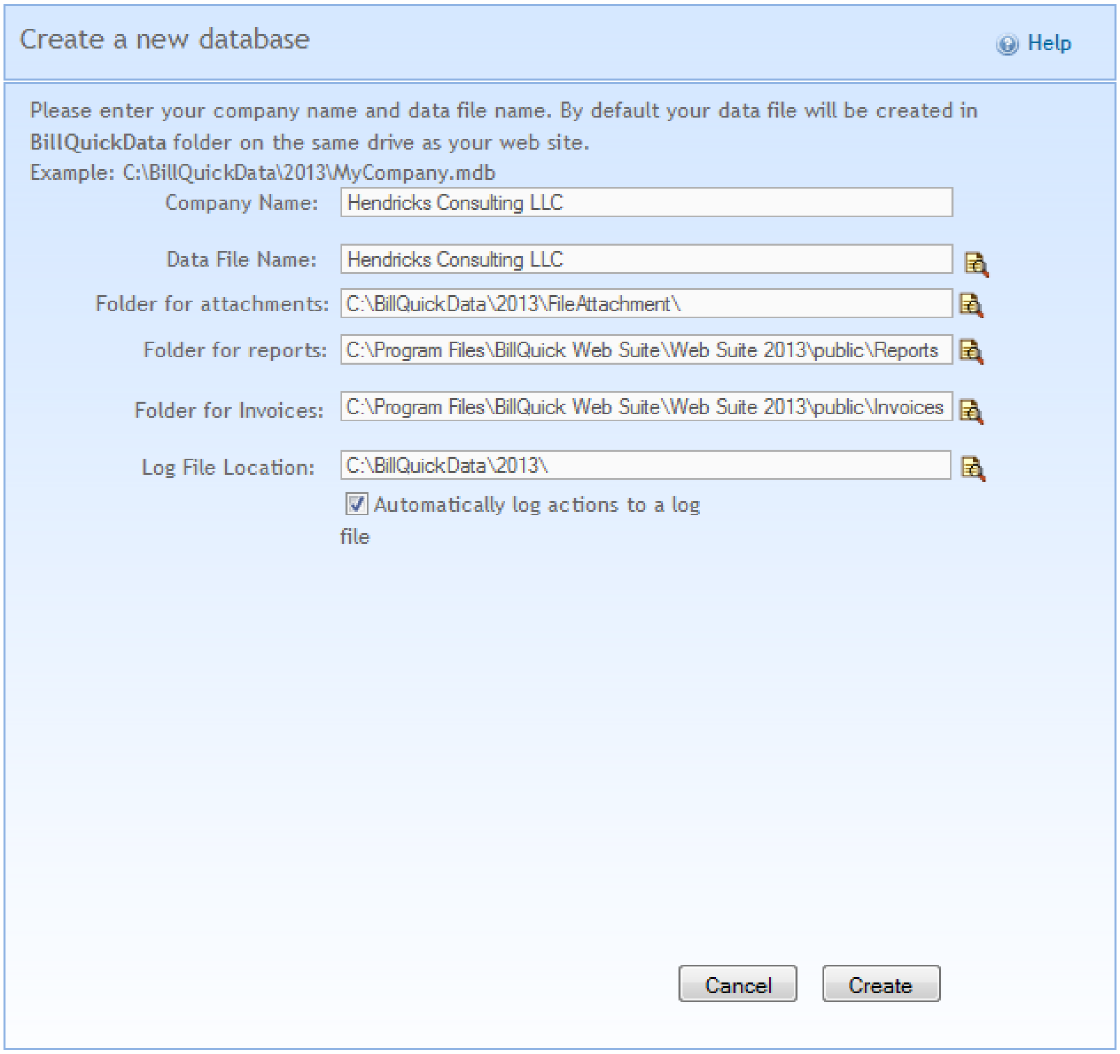
Creating Standard Database

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.



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).



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 – Microsoft Access Database Folder Permissions below).
5. Provide folder location for your reports, invoices, attachments and log file. For example, C:\Program Files\BillQuick Web Suite\Web Suite 2013\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\2013\
where X: is the physical drive letter where IIS is installed.

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

Special Note

Microsoft 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

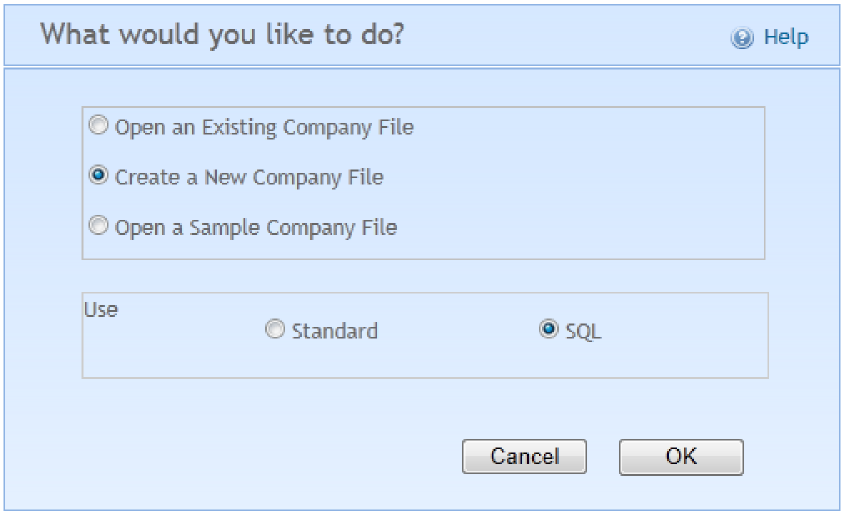
How you set the permissions depends on your operating system version. Consult your operating system documentation for details. Below are some links to online documentation for setting share permissions.
Windows XP:
http://www.microsoft.com/technet/prodtechnol/winxppro/maintain/filesharing.mspx

Creating SQL Database

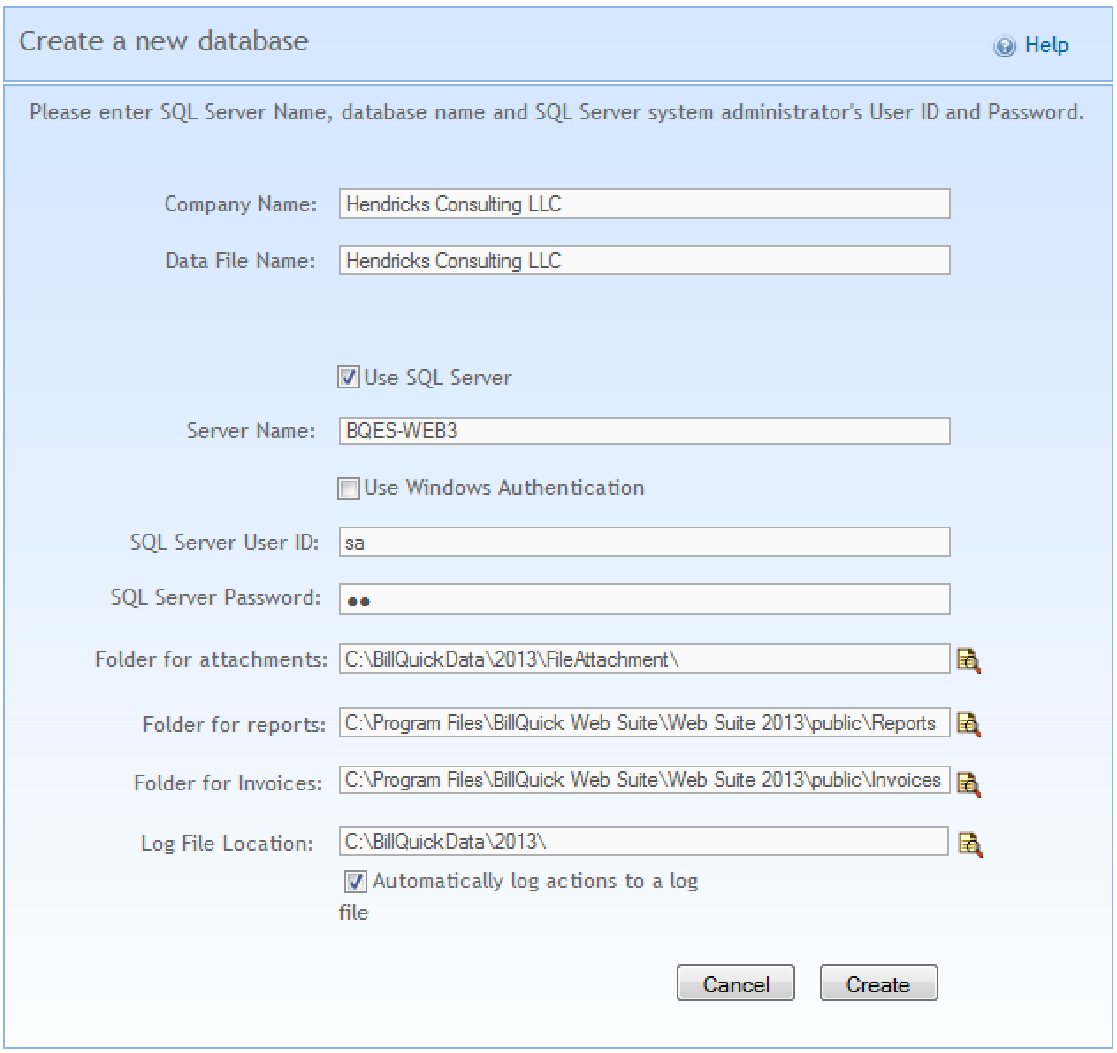
The instructions given below apply when you want to create a company file using Microsoft SQL Express (2005 or 2008) or SQL Server database.

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)



3. Make sure your web server is able to connect to your SQL Express or SQL Server database.



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

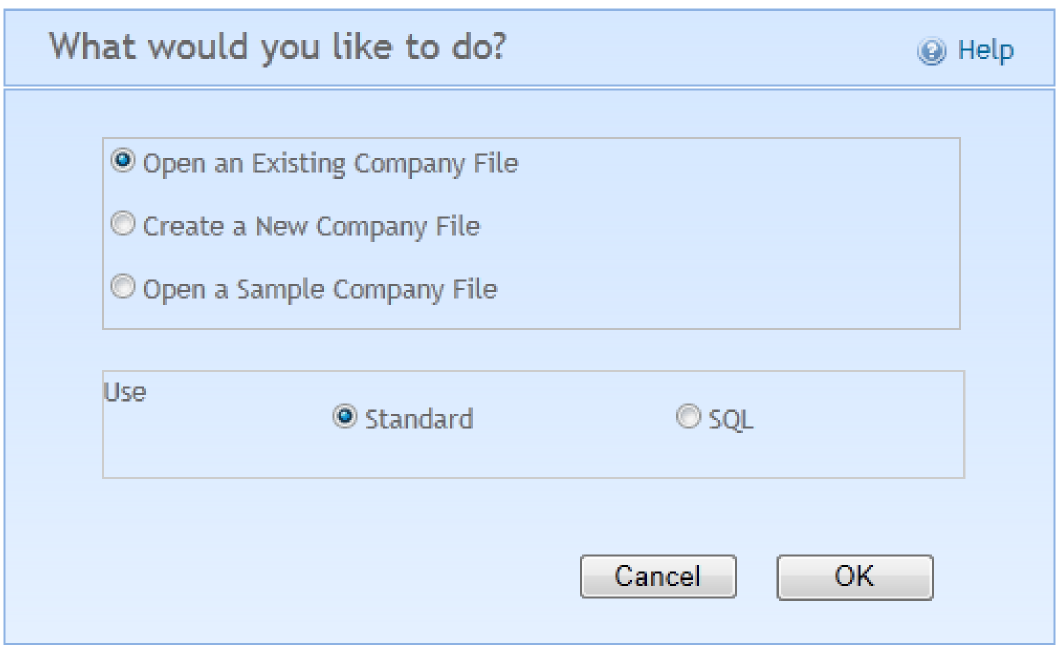
    You can specify any SQL Server account or use Windows Authentication as long as you have proper permissions to create a new database on your SQL Server account.

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

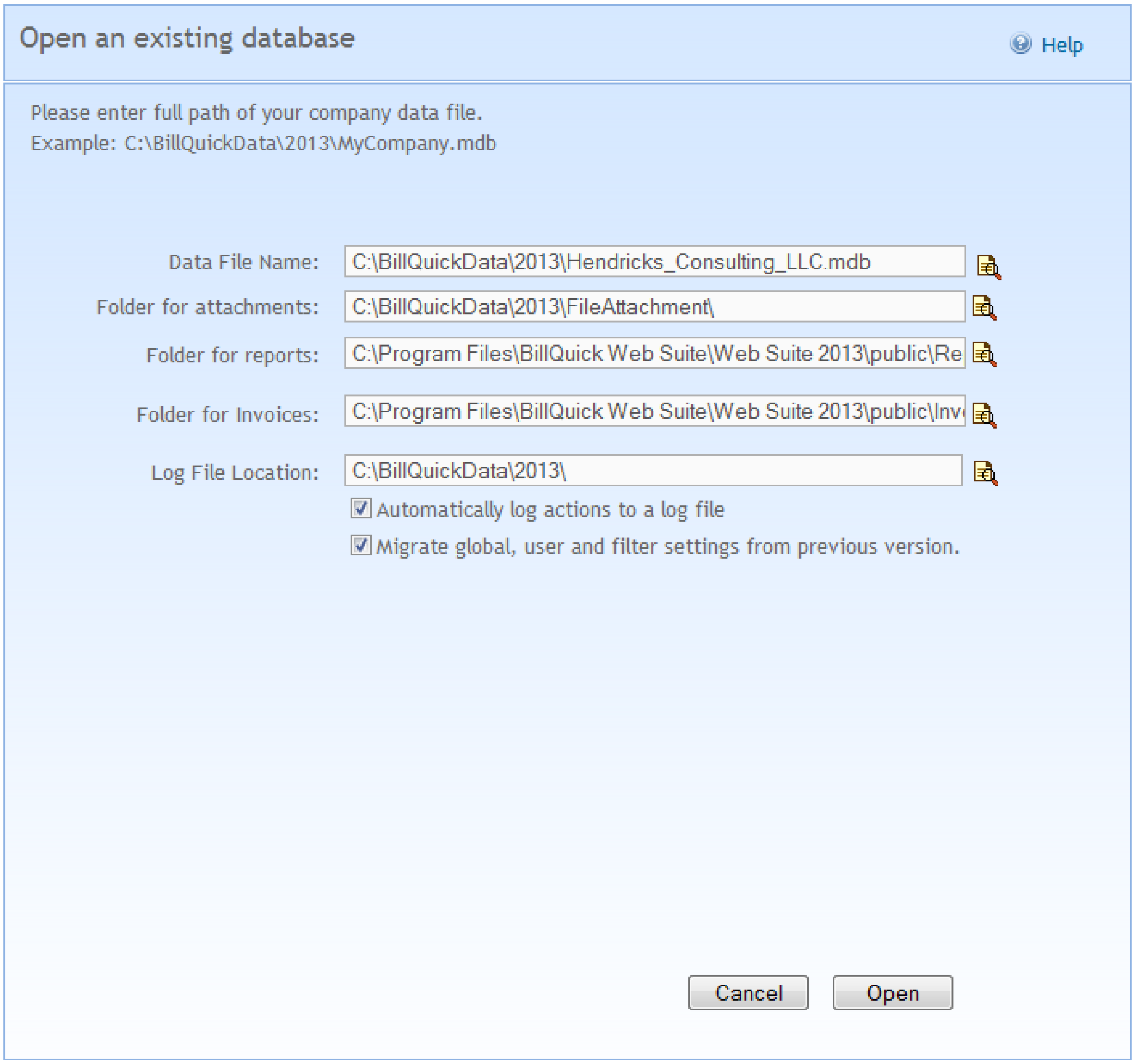
If you have upgraded from a previous version of Web Suite and have an existing data file, you are able to open it here. You are provided with the option to migrate your previous settings to the current version.

To open an existing company database:

1. When prompted, select 'Open an Existing Company File'. Else, do so by clicking the Admin Options dialog box 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). In addition, provide the folder location for your attachments, reports, invoices and log file.



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\2013\FileAttachment.

Activating Product

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 Registering

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.
2. Else, after logging in, click Settings on the navigation bar and select the Company tab.
3. On the Company screen click '*Click here to License and Register…*'

4. 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.
5. Enter the keys or cut-paste them from the email.
6. Click Save and then Validate.
7. If no message displays, click Return.

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

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

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

Starting Up

Click the *Web Suite 2013* desktop shortcut, or start Internet Explorer (or another supported browser) and enter the URL for your website, for example, http://www.mydomain.com/WS2013/default.aspx, where 'mydomain.com' is your website domain name. Alternatively, you may use the IP address (local host or computer name) of the server, for example

http://192.168.1.45/WS2013/default.aspx or
http://computername/WS2013/default.aspx or
http://localhost/WS2013/default.aspx or
http://127.0.0.1/WS2013/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.

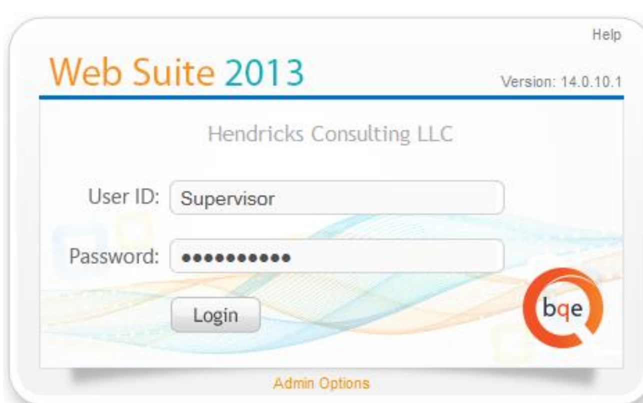
When you start Web Suite for the first time, it prompts you with some database options (*See* Web Suite Database *above*). Once you have successfully created a company database and security is turned on, you will be prompted for a login.

Logging In

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.

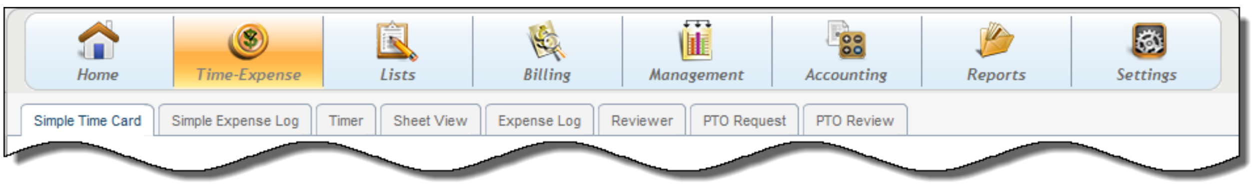


Navigating Web Suite

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

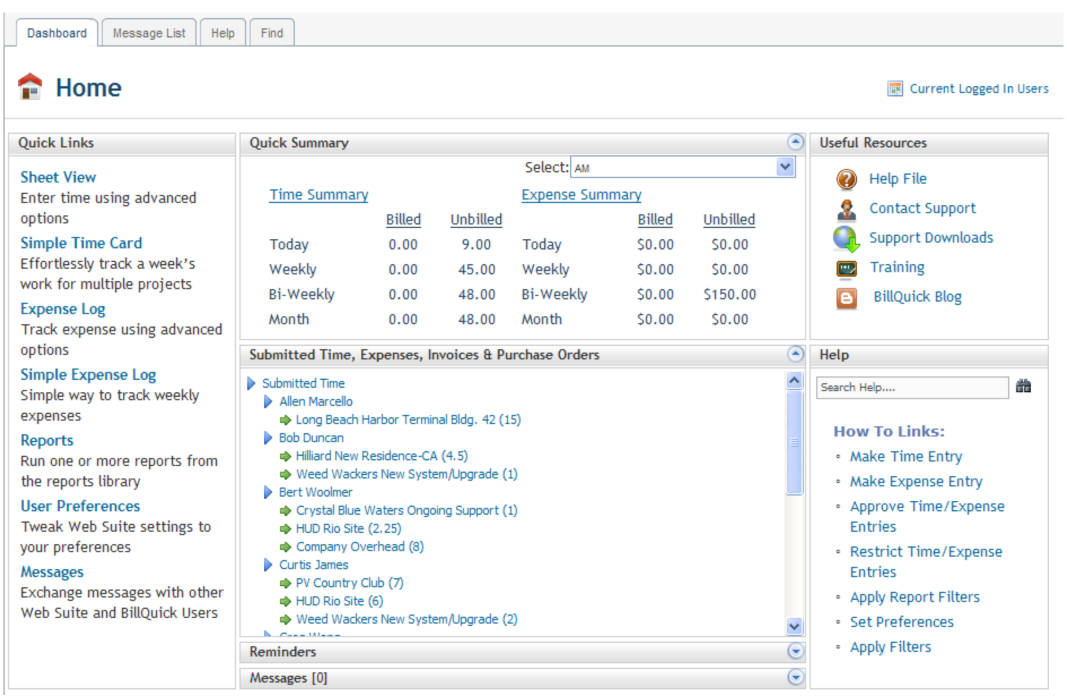
Navigation Bar

Web Suite displays a navigation bar at the top that represents a major function of the program. Clicking each icon on the navigation bar displays tabbed screens grouping related or similar functions. For example, Clicking *Time-Expense* on the navigation bar displays a group of tabbed screens like Simple Time Card, Timer, Expense Log, Reviewer, and so on. 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, and so on; Help and other resources like Blog, website, and so on; How To links and index-based Search; workflow section with quick account summaries, submission reminders and messages received.



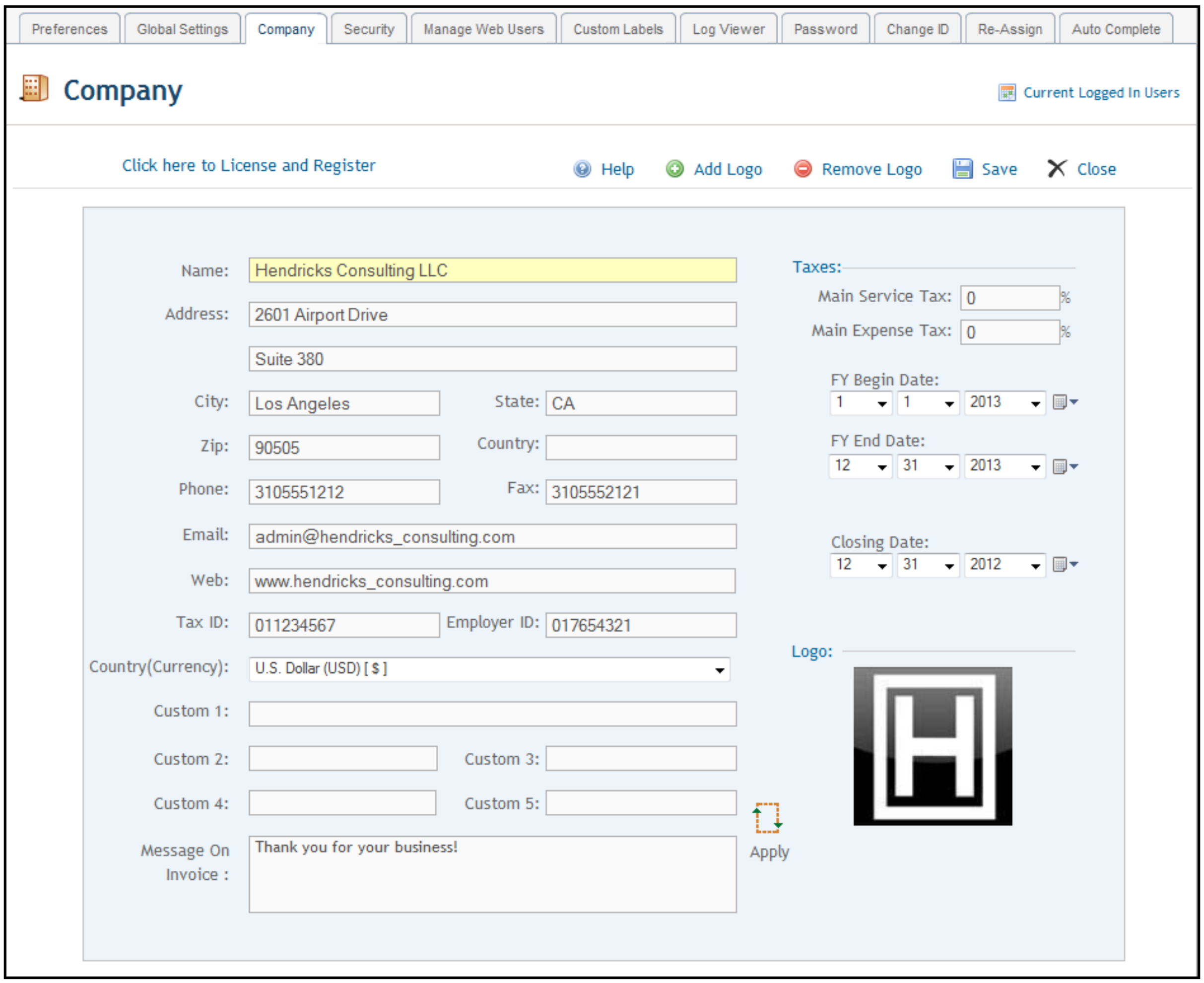
Master Information

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

Entering 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).



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

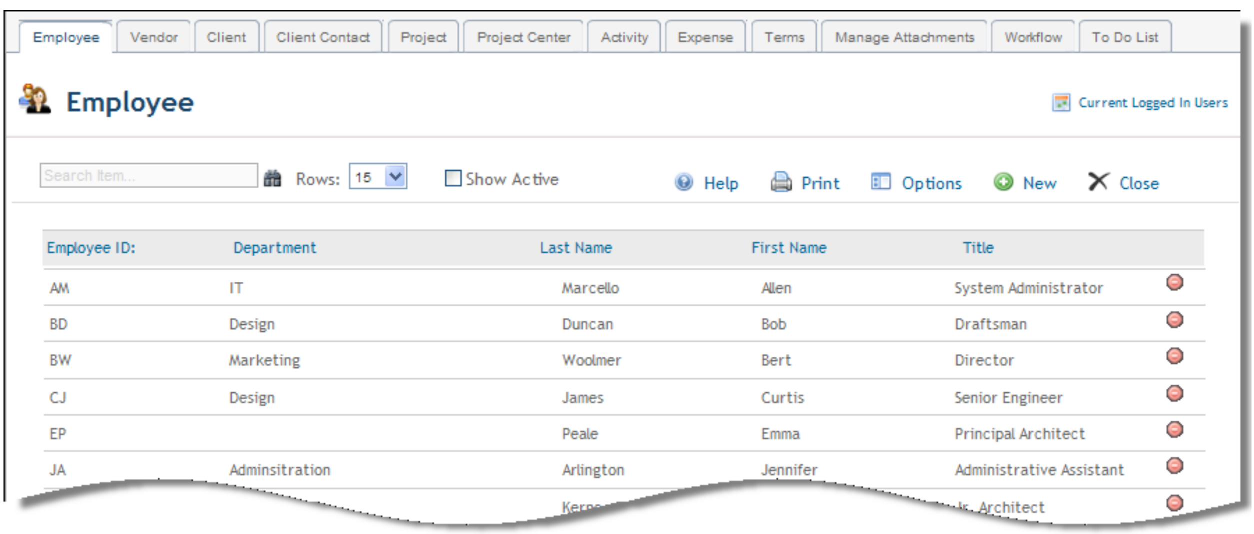
Your company information is now saved in the database. Let's look at the employee profile.

Entering Employee Information

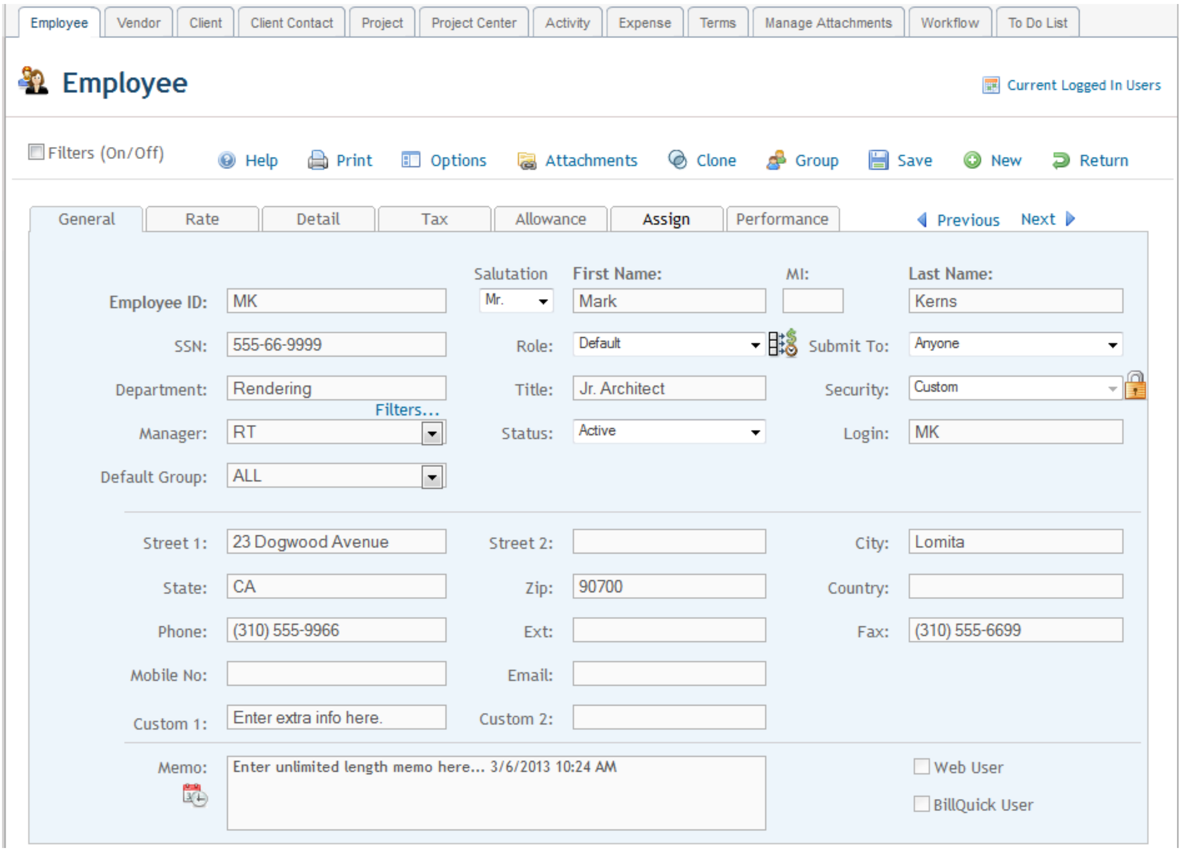
Employee screen represents a profile of a person working in a company on various activities and projects. This screen allows you to add and edit employee-related data. Employee information prints on reports and invoices. In addition, each employee has a default bill rate and cost rate that can be used 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.



3. Click New to open the Employee screen in a detail view where you can enter information for a new employee.
4. The pointer 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).



5. Enter other relevant and required data such as First and Last Name, address details, and so on. 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.

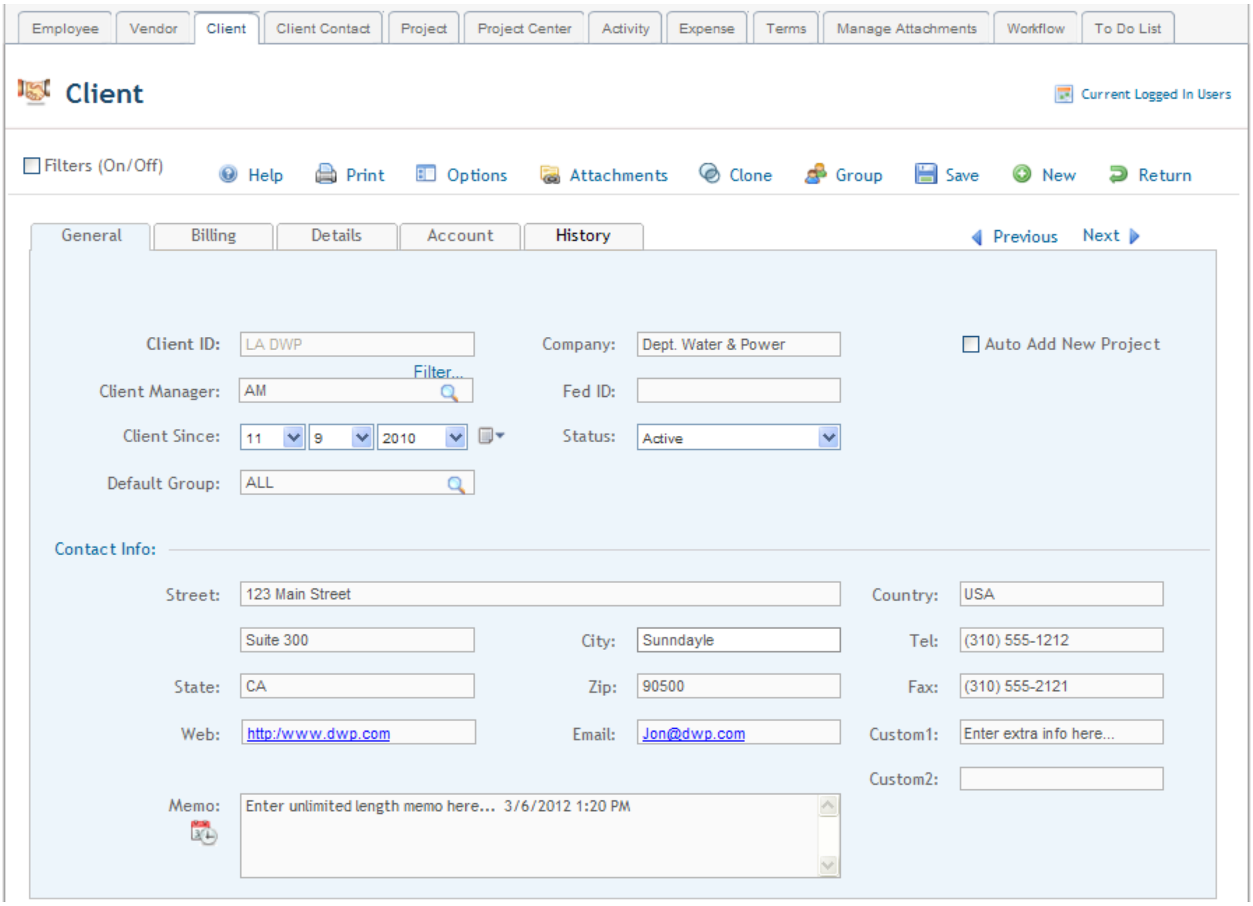
Similarly, you can create a vendor or subcontractor profile in the Vendor screen.

Entering Client Information

The Client screen allows you to 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.
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.



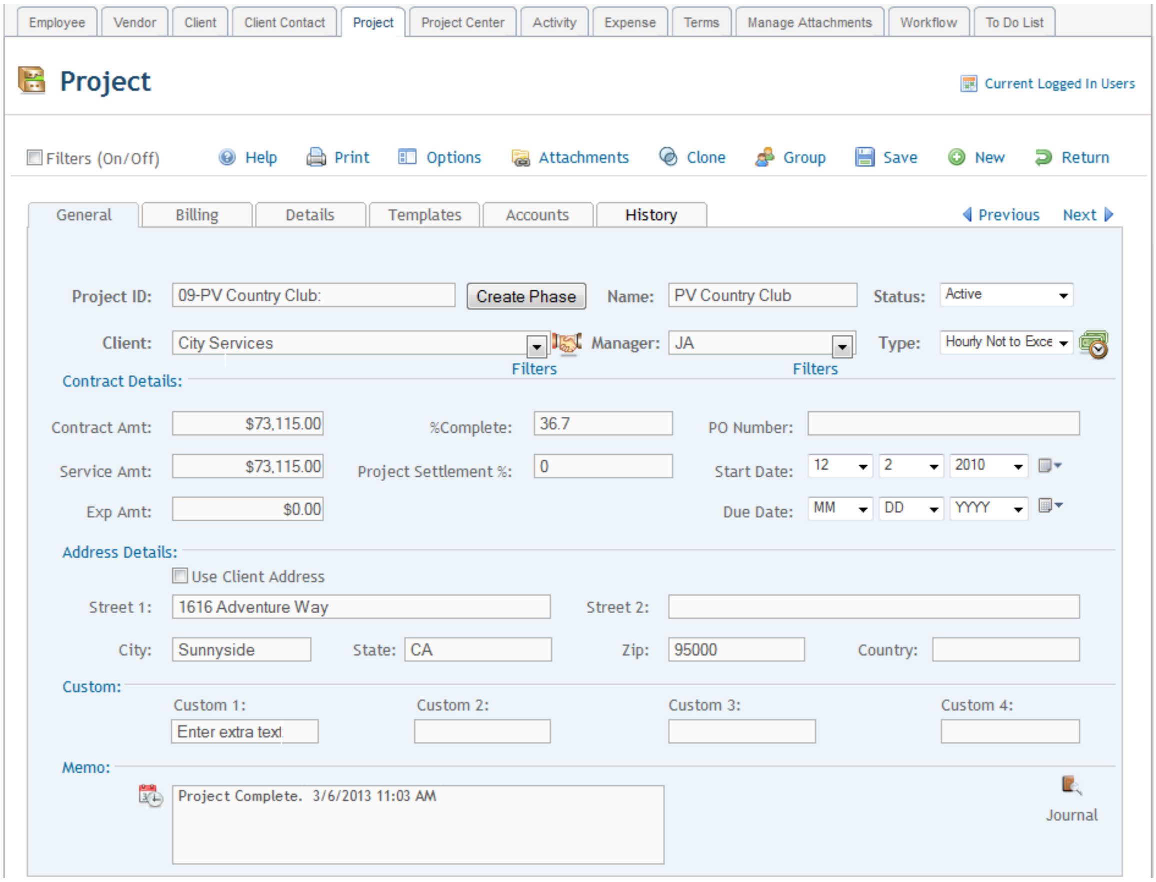
4. The pointer is automatically placed in the Client ID field on the General tab. Enter the Client ID using letters or numbers.
5. Enter other relevant data such as Contact Info, and so on. Press the Tab key to move from field to field or click on the next field.
6. If desired, enter information on the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

Entering 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.
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.



4. The pointer 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.

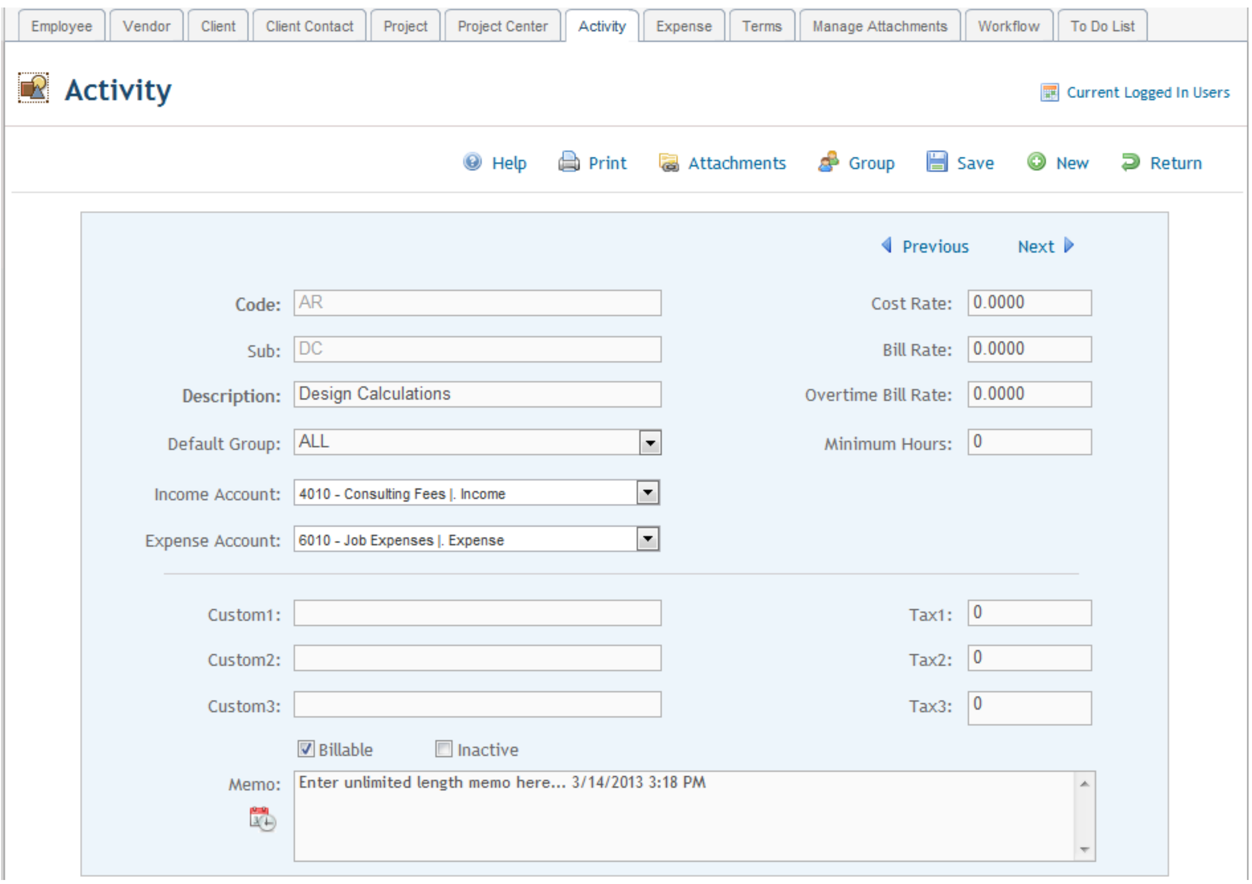
5. Enter other required and relevant data such as Name, Client, Manager, Status, Address Details, and so on.
6. In the Type field, select the type of contract used for this project (hourly, fixed, cost plus, and so on). If a fixed contract type is selected, be sure to fill in the Contract Details. Move 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.

Entering 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 pointer 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, and so on for the activity.
6. Make sure the Billable option is checked for each billable activity.
7. When done, click Save and then Return.

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.

Entering Time

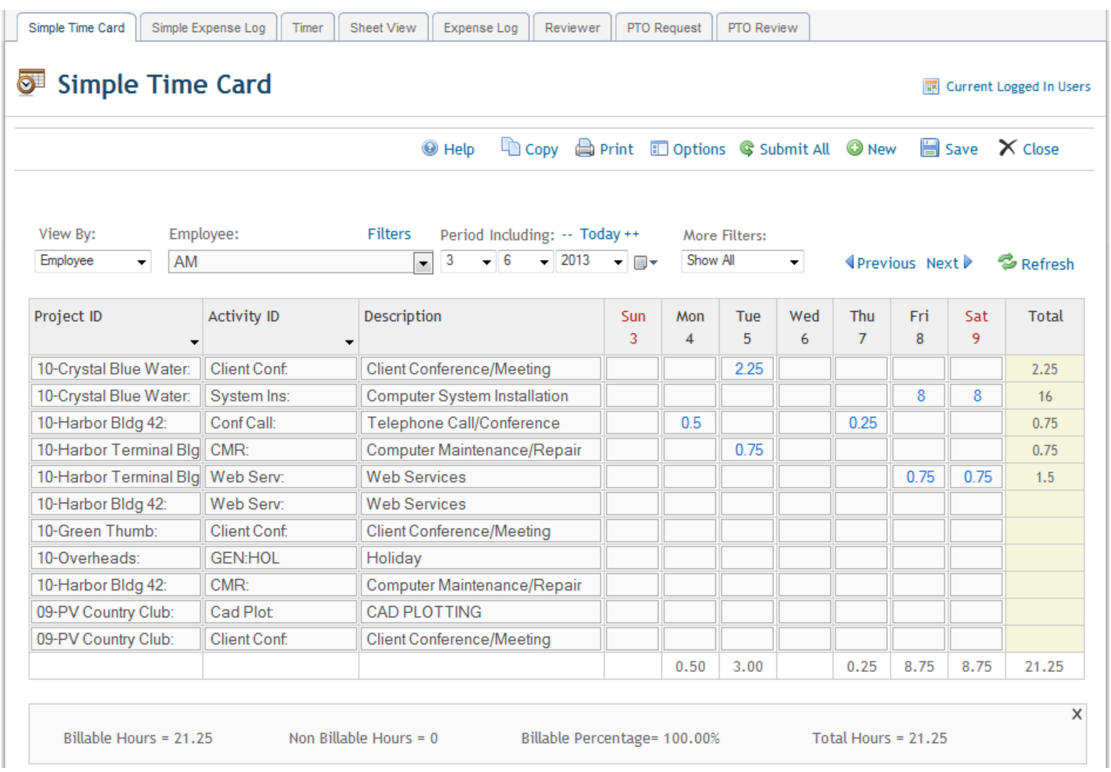
To enter and review time entries, you have three time entry options in Web Suite:

- 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.



Project ID	Activity ID	Description	Sun 3	Mon 4	Tue 5	Wed 6	Thu 7	Fri 8	Sat 9	Total
10-Crystal Blue Water:	Client Conf:	Client Conference/Meeting			2.25					2.25
10-Crystal Blue Water:	System Ins:	Computer System Installation						8	8	16
10-Harbor Bldg 42:	Conf Call:	Telephone Call/Conference		0.5			0.25			0.75
10-Harbor Terminal Blg	CMR:	Computer Maintenance/Repair			0.75					0.75
10-Harbor Terminal Blg	Web Serv:	Web Services						0.75	0.75	1.5
10-Harbor Bldg 42:	Web Serv:	Web Services								
10-Green Thumb:	Client Conf:	Client Conference/Meeting								
10-Overheads:	GEN:HOL	Holiday								
10-Harbor Bldg 42:	CMR:	Computer Maintenance/Repair								
09-PV Country Club:	Cad Plot:	CAD PLOTTING								
09-PV Country Club:	Client Conf:	Client Conference/Meeting								
				0.50	3.00		0.25	8.75	8.75	21.25

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 enables you to 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 or 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 want.

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.

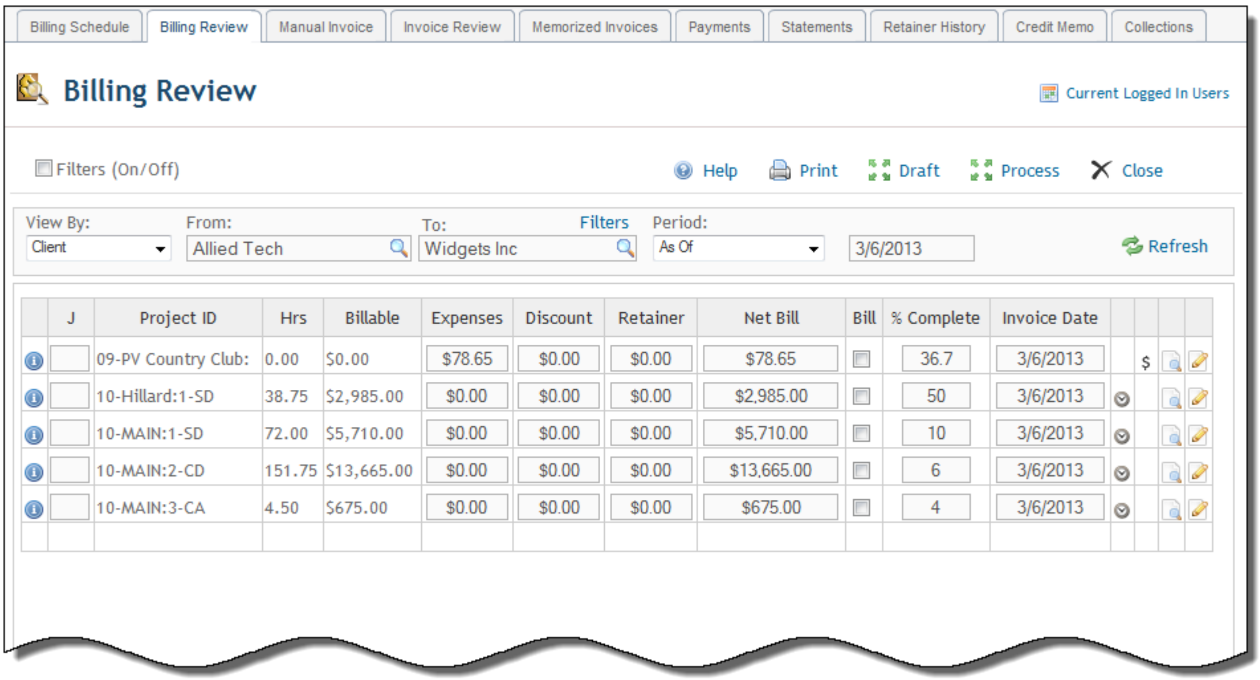
Similarly, you can record expense entries in the Expense Log or Simple Expense Log screen.

Billing

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



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 want, 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 records disappear and move to the Invoice Review screen.
9. When done, click Return.

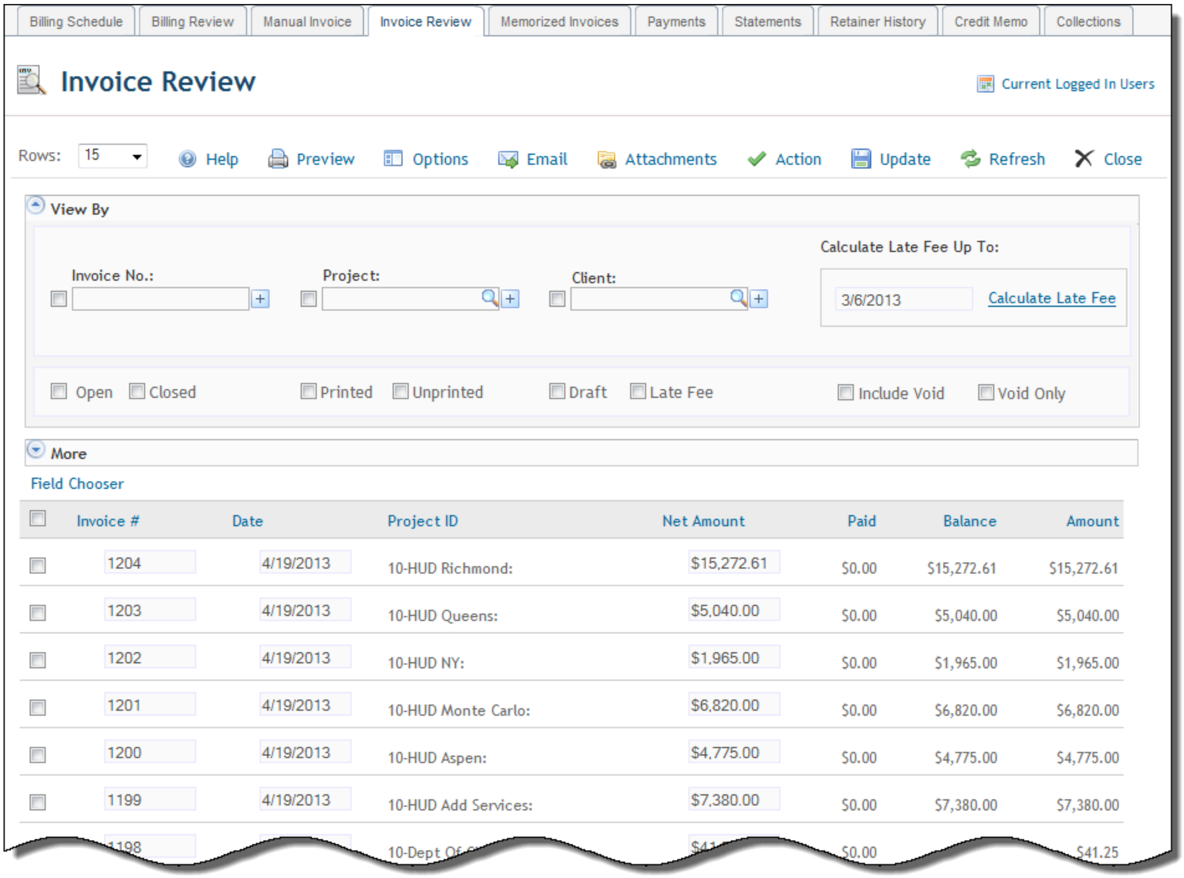
Now you are ready to review and print your invoices before sending them to your clients.

Creating 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:

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.



If you created a draft invoice, select the Draft check box and then refresh the screen.

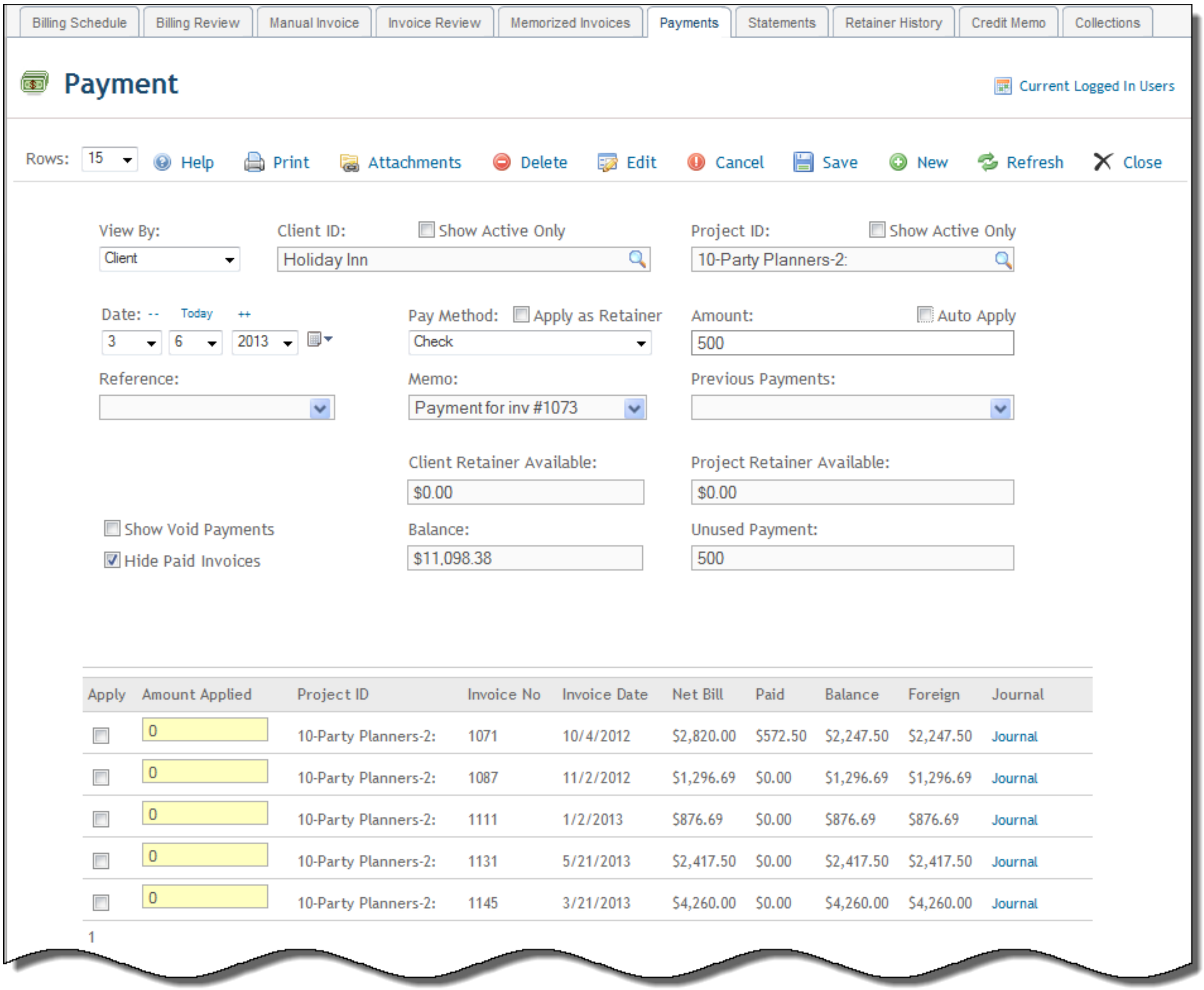
3. Find the invoice generated in the last procedure (Billing Review) and then select it by selecting the check box to the left of it.
4. Click Print to preview, print or email the invoice.
5. When done, click Close.

Recording Payments

The Payment screen allows you to 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.



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.

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.

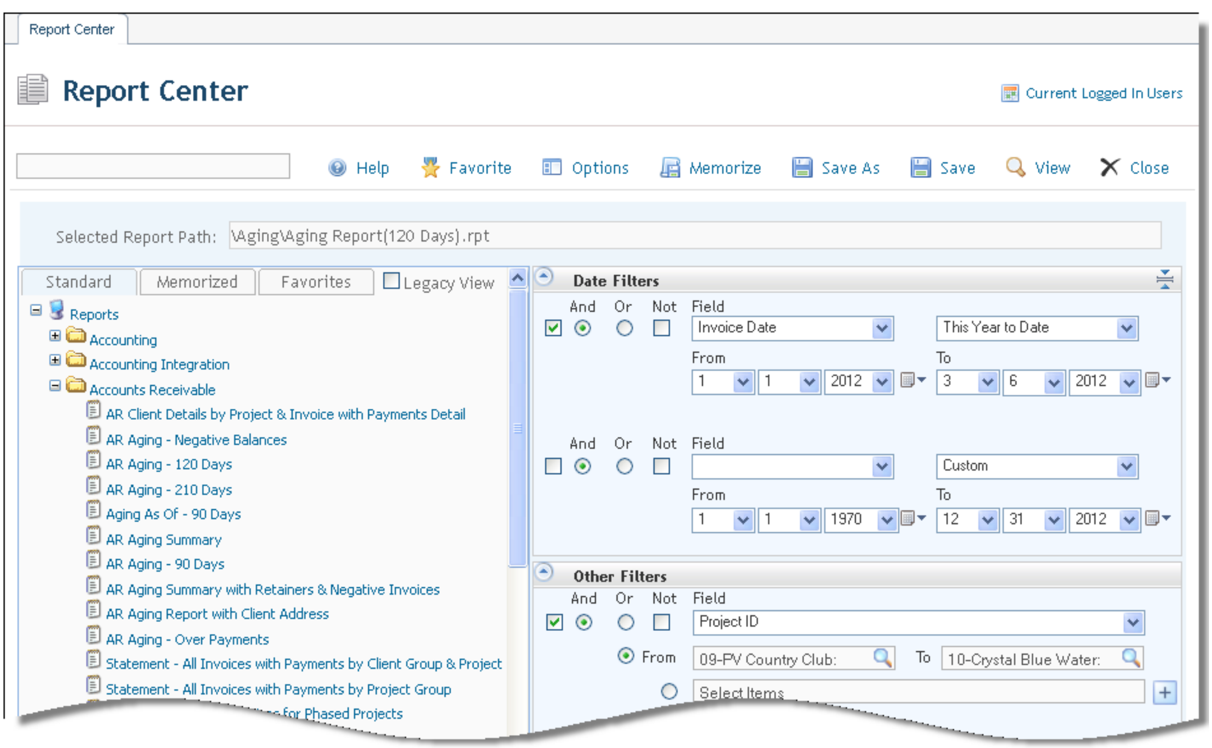
BQE Software develops all reports using Crystal Reports Writer, the most widely used report writer software. In addition, all your reports and invoice formats can be customized by BQE Reports Team.

Reporting

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.

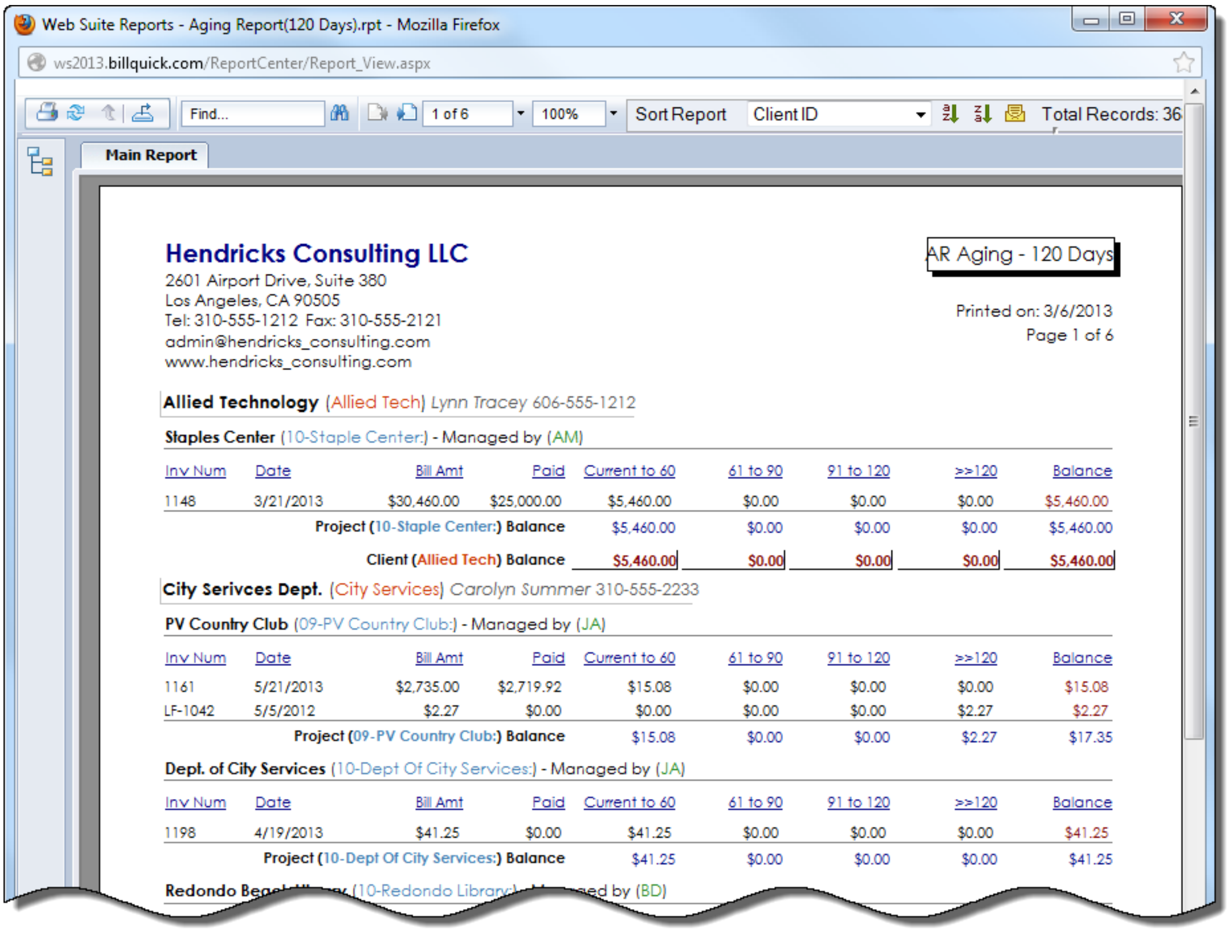
To view or print a report:

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.



You can check the Legacy View option to view the standard report list accordingly to the 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.



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

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.

For more information, visit us at www.bqe.com.If you have any trouble in using Web Suite, please contact BillQuick Support at (310) 602-4030 or 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.