

Web Suite Getting Started Guide

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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 expenses 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 educate yourself quickly 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 [BQE Services](#) for more.*

Web Suite Setup Checklist

	Task	Resources and References
Pre-Installation	Check our system requirements	System 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	Downloads
	Log in to Windows as an administrator and install Web Suite	Read Installation Upgrade Web Suite
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 under [System Requirements](#).



If you are experiencing problems while installing Web Suite, please check the BQE [Knowledge Base Articles](#).

INSTALLATION

Web Suite 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 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:
 - o log in to your web server as an administrator
 - o 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.



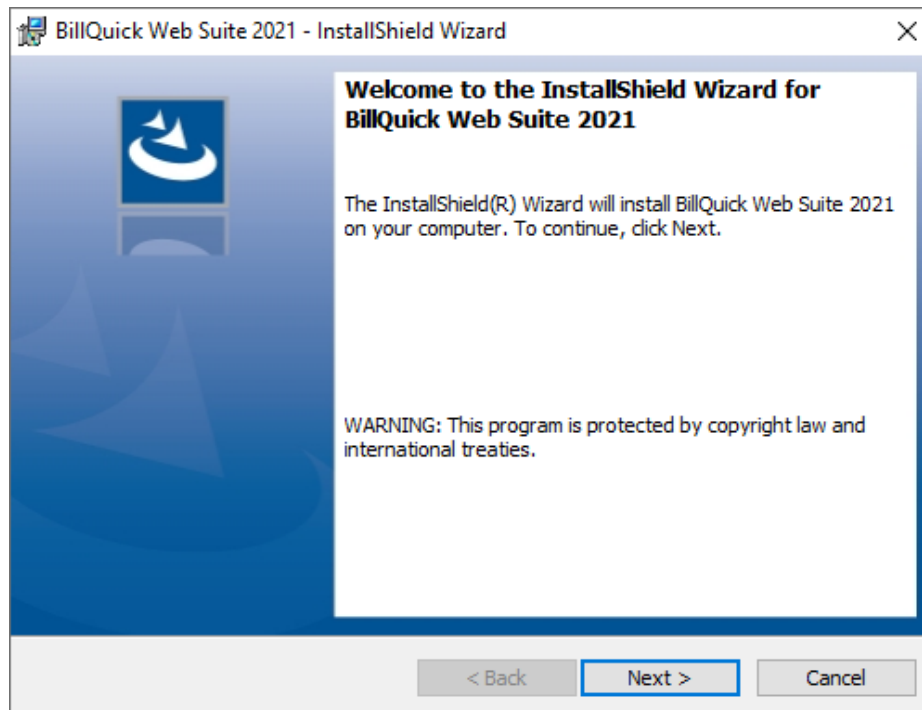
The installer or setup is a zipped file. You will need a Zip archiving or extraction program. Windows 7 has an extraction tool built into its Windows Explorer.

Installing Web Suite

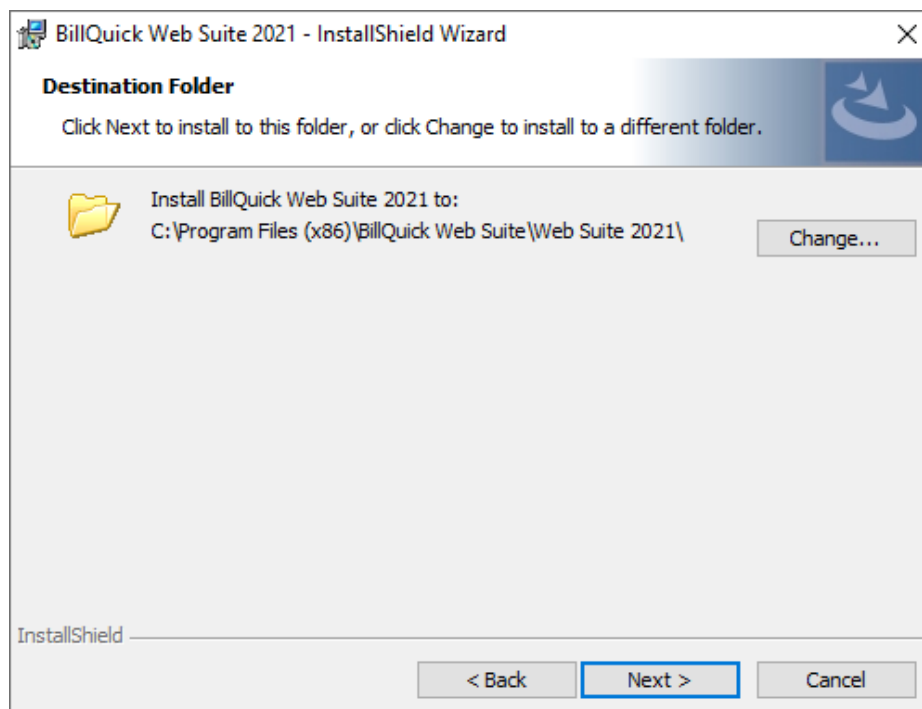
Web Suite has two main components - a Public Web Site and an Admin Web Site. Both are installed by the Web Suite setup program on your IIS Web Server running compatible server software. To install Web Suite, you must be logged in as 'administrator' on the web server that is running Microsoft Internet Information Server. Your IIS web server should be properly configured to run ASP.NET 4.5 web applications.

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

1. After downloading and extracting Web Suite from the archive, navigate to the folder where you placed the extracted files. Double-click on WS2021Setup.exe.
2. When the BillQuick Web Suite 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 to reboot the server. After rebooting, you can open the Internet browser and type the URL (uniform resource locator) of your website:

<http://www.MyDomain.com/WS2021/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/WS2021/default.aspx> or

<http://computername/WS2021/default.aspx> or

<http://localhost/WS2021/default.aspx> or

<http://127.0.0.1/WS2021/default.aspx>



If you are experiencing problems while installing Web Suite, please check the BQE [Knowledge Base Articles](#).

Advanced Installation

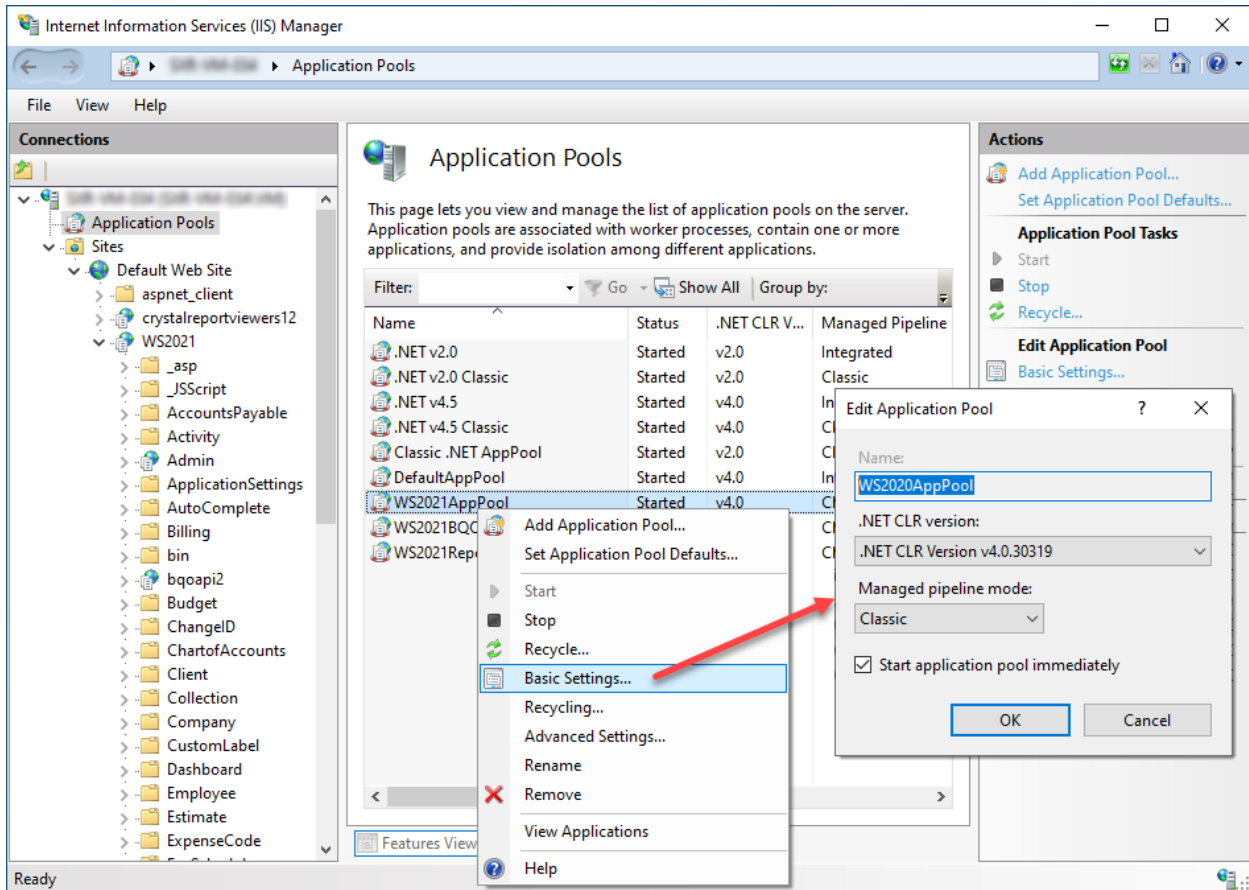
By default, the setup process for Web Suite creates the WS2021 Application under the Default Web Site in Internet Information Services (IIS) and assigns Anonymous Authentication to it. It also creates the Admin Virtual Directory (Application) under WS2021 and assigns Windows Authentication to it.



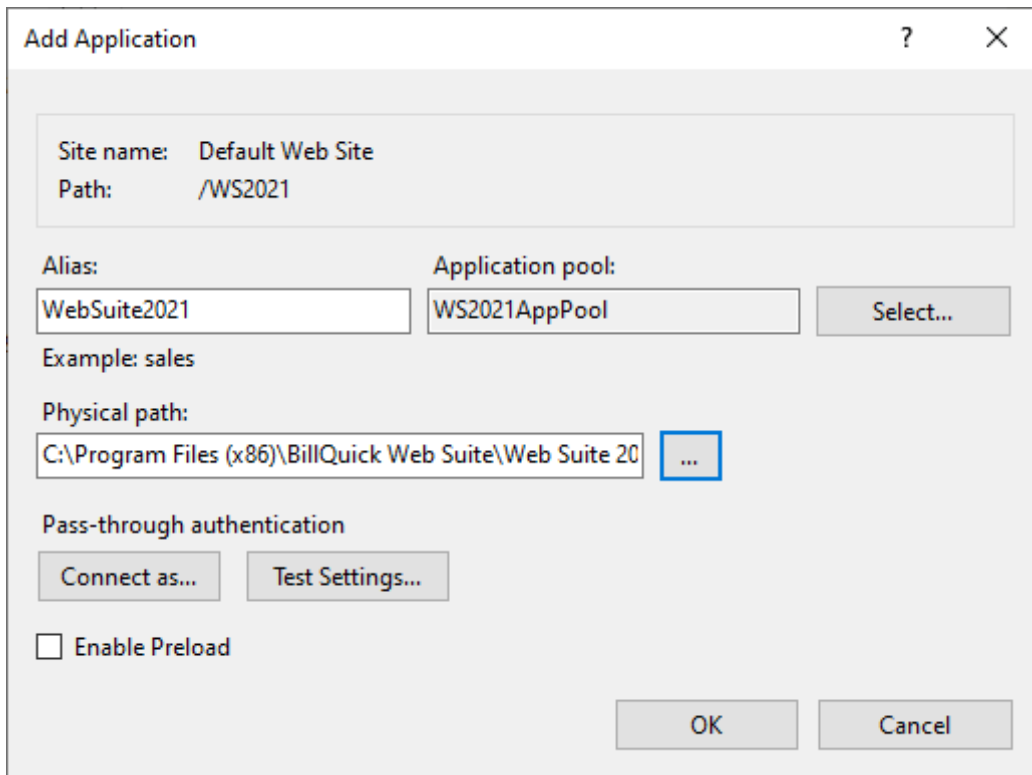
If you are using IIS 6.0 or lower, use Virtual Directory instead of Application.

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. (Alternatively, open *inetmgr* from the command prompt.)
2. On the left panel, select Application Pools. You can create three new Application Pools here, for instance, WS2021AppPool, WS2021BQOAPI2AppPool and WS2021ReportCenterAppPool.
3. On the right panel, right-click on WS2021AppPool and select Basic Settings.




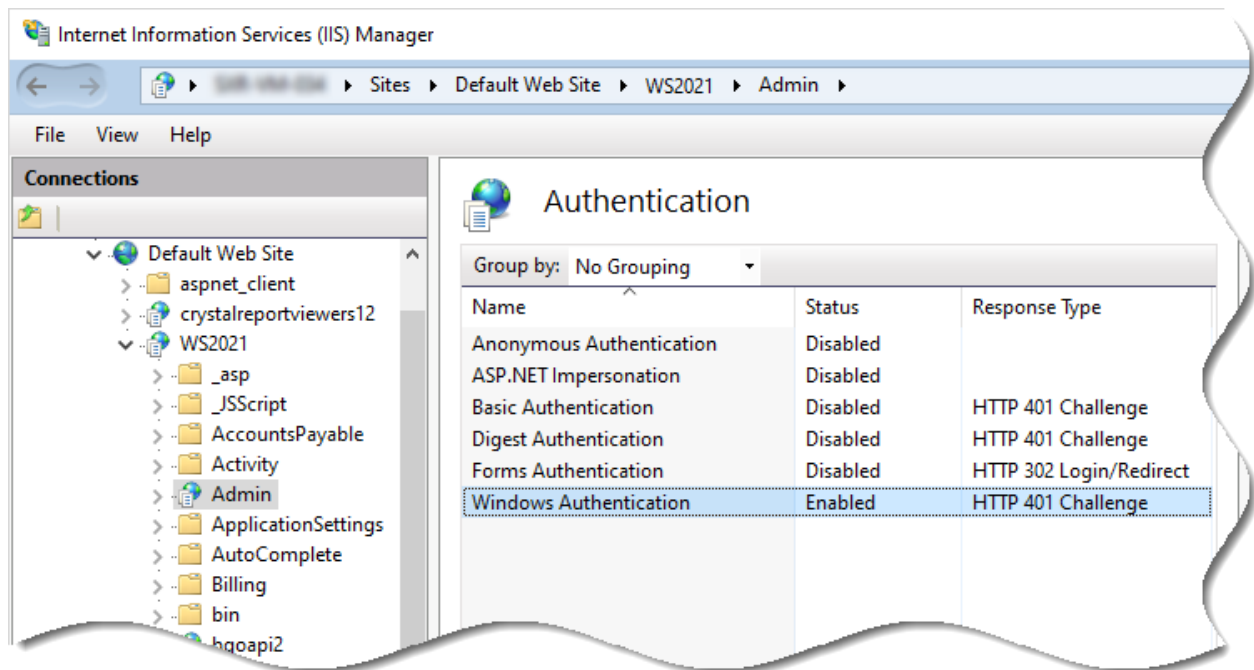
4. By default, the Name of the application pool is WS2021AppPool but you can change it. Make sure the .NET Framework version selected is 4.0.30319 and Managed Pipeline Mode is Classic.
5. Click OK and then close.
6. Now right-click on WS2021AppPool again and select Advanced Settings.
7. Under General, make sure Enable 32-Bit Applications is set to False 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 *WebSuite2021* (or any other name) as an alias for the program.



10. Check the Application Pool (for example, WS2021AppPool) 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 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 2021\public folder. Click OK.
12. Right-click on WebSuite2021 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 2021\admin folder. Click OK.
15. Enter BQOAPI2 as an alias for the program to use the BillQuick Mobile app.
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 2021\ BQOAPI2 folder. Click OK.
17. Assign the WS2021BQOAPI2AppPool to it.

18. Now select WS2021 on the left panel. On the right panel under IIS, open or double-click Authentication.
19. Make sure Anonymous Authentication is enabled while the other options are disabled.
20. Next, select WS2021 > Admin on the left panel.
21. On the right panel under IIS, open or double-click Authentication. Make sure Windows Authentication is enabled while the other options are disabled.

 If you are experiencing problems while installing Web Suite, please check the BQE [Knowledge Base Articles](#).



22. Right-click on WS2021 and add an application named ReportCenter to it. Navigate to the folder where the Report Center is located:


C:\Program Files (x86)\BillQuick Web Suite\Web Suite 2021\ReportCenter

23. Assign WS2021ReportCenterAppPool to it along with Windows Authentication.

Upgrading from Previous Versions

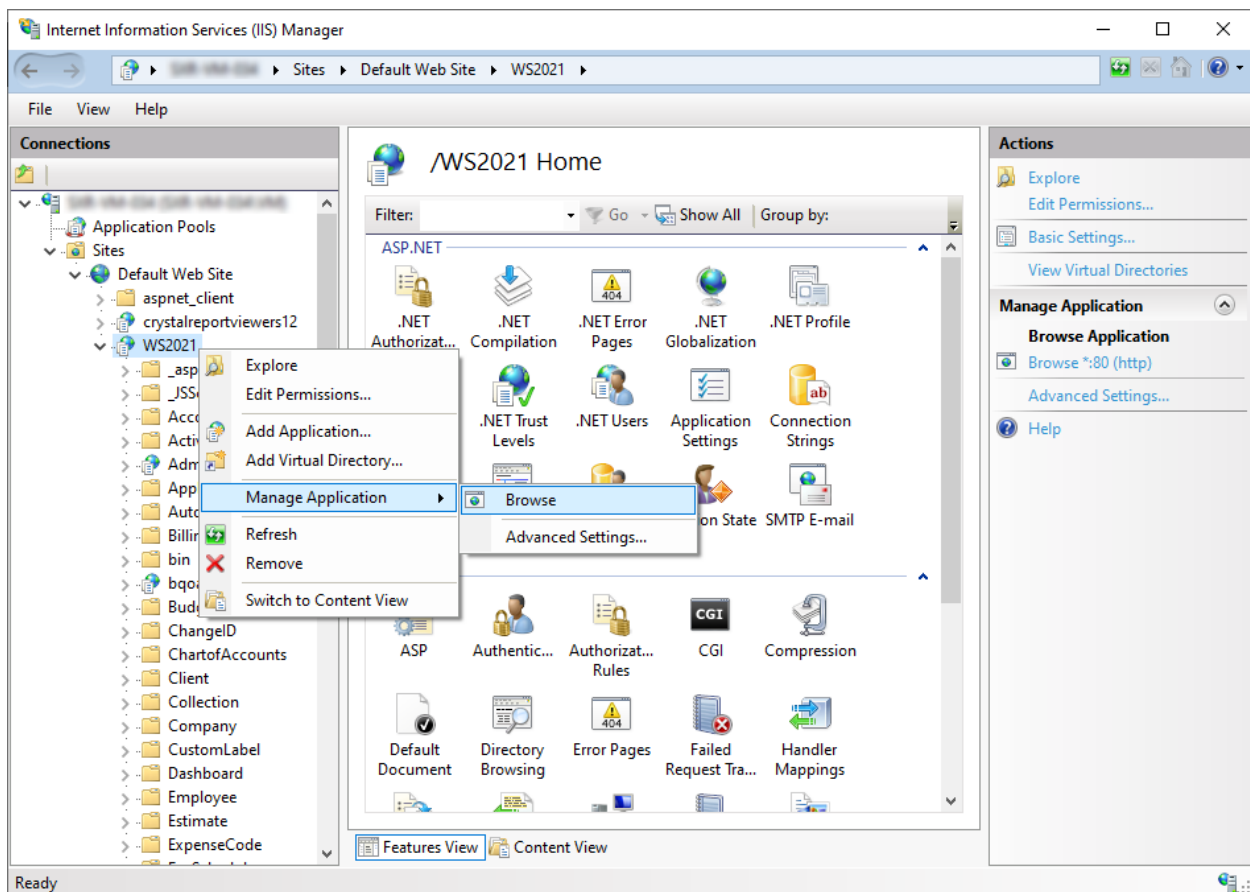
Web Suite installs as a separate program from your current version. However, we recommend uninstalling the older version after you have upgraded to the new one. If you want to uninstall it, do so from Control Panel, Add/Remove Programs. Before you begin the upgrade process, you must download and install BillQuick and the latest Web Suite version—you need to open your existing Web Suite database through

BillQuick. When upgrading from one version of Web Suite to another, it allows you to migrate your global, user and filter settings.

 Please make sure all other users have logged off from Web Suite prior to converting your database and they stop using the previous version so as to prevent having to re-enter any data.

Please follow the steps below to upgrade to the latest version of Web Suite:

1. Install the new version of Web Suite (*as explained above*).
2. On the BillQuick Web Suite Install Shield Wizard > Destination Folder screen, double-check the default directory to make sure it is different from your old Web Suite version. **You must install Web Suite in a separate folder.** A new website and application pool will be created in IIS.



3. Web Suite can be launched directly from IIS or a web browser. Depending on how the previous version has been configured, you can launch Web Suite from the same location as your prior version but with the extension /ws2021 (for example, <https://www.companyname.com/ws2021>).

On the Login screen, click Admin Options.

4. You are prompted to connect Web Suite to your BillQuick database. Choose to open an existing database. *Please read the [Startup > Opening an Existing Database](#) section for details.*



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.

Best Security Practices for Web Suite Environment

We highly recommend you to read and follow the best security practices as outlined here: [Web Suite Security Best Practices](#).

START-UP

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.

When Web Suite opens for the first time, you can open an existing company file.

Opening an Existing Company File

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.

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

Open an existing company file Help

Please enter your BillQuick data file name, SQL Server name and login credentials. By default SQL Server User ID is BillQuickSQL and Password is admin.

BillQuick Data File Name:

SQL Server Options


Server Name:

Use Windows Authentication


SQL Server User ID: Admin ID:


SQL Server Password: Password:

File attachments location


Folder for attachments: 

Reports and Invoices location

Folder for Reports: 

Folder for Invoices: 

Log file location

Log File Location: 

Automatically log actions to a log file

Migrate global, user and filter settings from previous version.

Cancel Open

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 (for SQL DML operations)
- SQL Server Password
- Admin ID and Password (for SQL DDL operations)

- o Folder location for attachments, reports, invoices, and log file
5. Check the option to migrate (copy) your previous version's global settings, filter settings and assigned Web users to the current version.
 6. Click Open. You are prompted to log in. *Please read [Logging In](#) for more.*



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\2021\FileAttachment.

Activating Product

After 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 15 days with full functionality (no need for an evaluation key). After the evaluation period is over, you must purchase a full software subscription 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...*'

Please enter your license and registration keys.

Company Name:	<input type="text" value="Hendricks Consulting LLC"/>
License Key:	<input type="text" value="CYQV-8DHG-86LE-1GQ0"/>
Registration Key:	<input type="text" value="1LTT-80VG-C4FC-33MB"/>

4. Enter or check your Company Name. It should be 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.

Licensing Web Suite from BillQuick

Do the following to license Web Suite from BillQuick:

1. Open the Product Licensing and User Management screen from the File menu in BillQuick.
2. Enter the license key against the Web Suite product on the Licenses tab.
3. Click Update to save the license information.
4. Move to the Users tab. You can grant employees and vendors access to Web Suite by marking the check box in the appropriate column.
5. Alternatively, you can use the right-click options to assign and un-assign multiple users to Web Suite. You can select multiple cells on the grid and then make your assignments.
6. Choose the desired security profile from the list for the selected employee or vendor, for example, Full Access, Time and Expense Only, Billing Only, and so on. If you prefer to customize security permissions for them, use the Security screen in Web Suite (or BillQuick).
7. When you have finished, click Close.

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 desktop shortcut or start Internet Explorer (or another supported browser) and enter the URL for your website, for example, <http://www.mydomain.com/WS2021/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/WS2021/default.aspx> or

<http://computername/WS2021/default.aspx> or

<http://localhost/WS2021/default.aspx> or

<http://127.0.0.1/WS2021/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 *Logging In* below.

When you start Web Suite for the first time, it prompts you with some database options (See [Web Suite Database](#) above). After 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

Web Suite organizes its functions, features, and reports into menus. Like all Windows programs, Web Suite has navigation menus at the top from where you can access all the menus and submenus. At the top, you can see the database name, security status and program version.

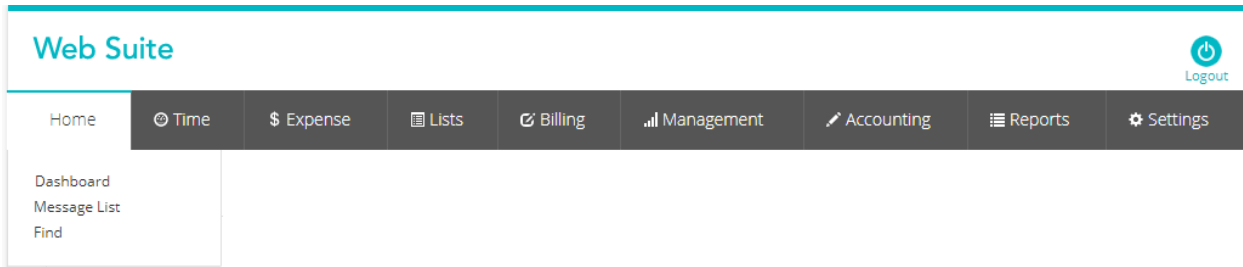


Security permissions determine what features, functions and information a user can access and view in Web Suite.

Navigation Menus

Web Suite displays navigation menus at the top that represents all the major functions of the program.

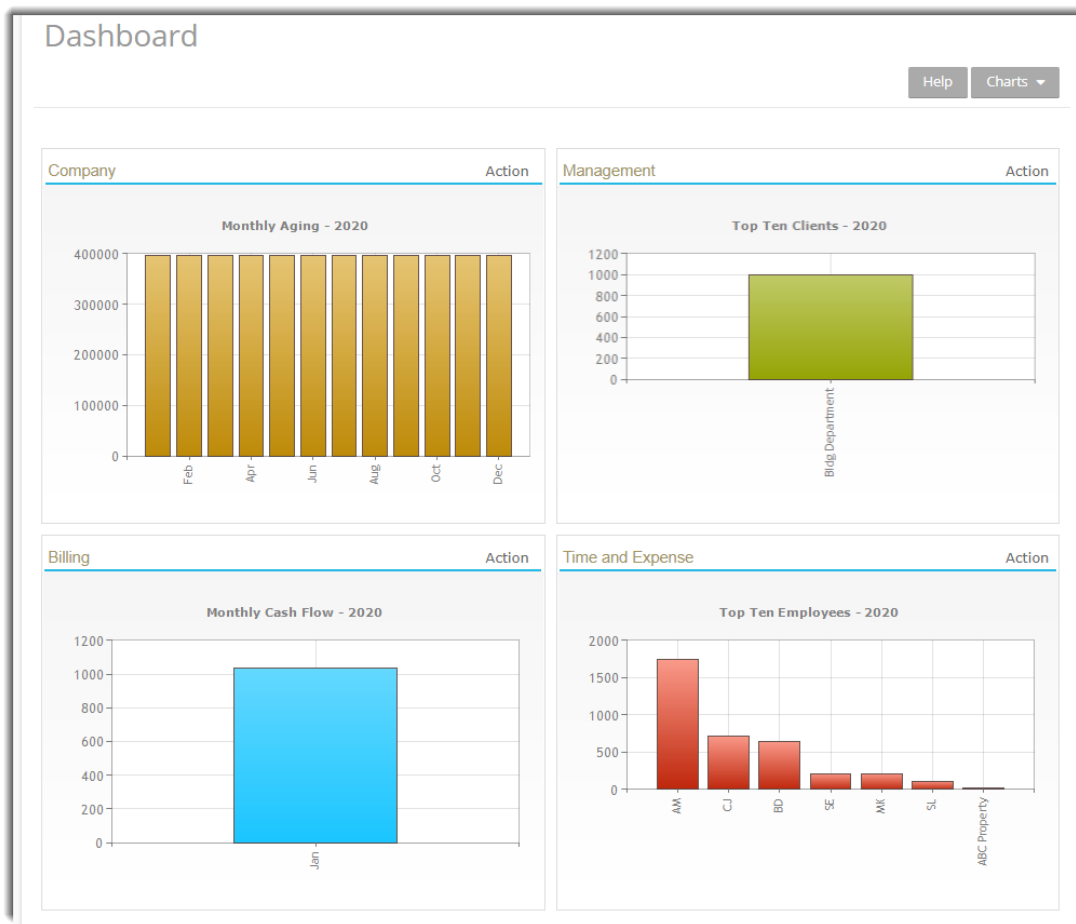
Clicking each menu item displays lists and submenus.



Home Page

The Home page of Web Suite provides useful user-based information and links. You can access:

- Important reminders and messages received
- Submitted time, expenses, invoices, and other items
- Charts depicting your non-billable time, billable time, etc.



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, open Company screen from Settings.

Company

Help Add Logo Remove Logo Save

[Click here to License and Register](#)

Name:	<input type="text" value="Hendricks Consulting LLC"/>	Taxes:	
Address:	<input type="text" value="2601 Airport Drive"/> <input type="text" value="Suite 380"/>	Main Service Tax:	<input type="text" value="0"/> %
City:	<input type="text" value="Los Angeles"/>	State:	<input type="text" value="CA"/>
Zip:	<input type="text" value="90505"/>	Country:	<input type="text"/>
Phone:	<input type="text" value="3105551212"/>	Fax:	<input type="text" value="3105552121"/>
Email:	<input type="text" value="admin@hendricks_consulting.com"/>	Fiscal Year Begin Date:	<input type="text" value="1/1/2021"/>
Web:	<input type="text" value="www.hendricks_consulting.com"/>	Fiscal Year End Date:	<input type="text" value="12/31/2021"/>
Tax ID:	<input type="text" value="011234567"/>	Employer ID:	<input type="text" value="017654321"/>
Country(Currency):	<input type="text"/>	Closing Date:	<input type="text" value="12/31/2020"/>
Custom 1:	<input type="text"/>	Logo:	
Custom 2:	<input type="text"/>	Custom 3:	<input type="text"/>
Custom 4:	<input type="text"/>	Custom 5:	<input type="text"/>
Message On Invoice :	<input type="text" value="Thank you for your business!"/>	Apply	<input checked="" type="checkbox"/>

2. Enter your company Name, Address, and all other relevant contact information in the appropriate fields.

- When finished, click Save.

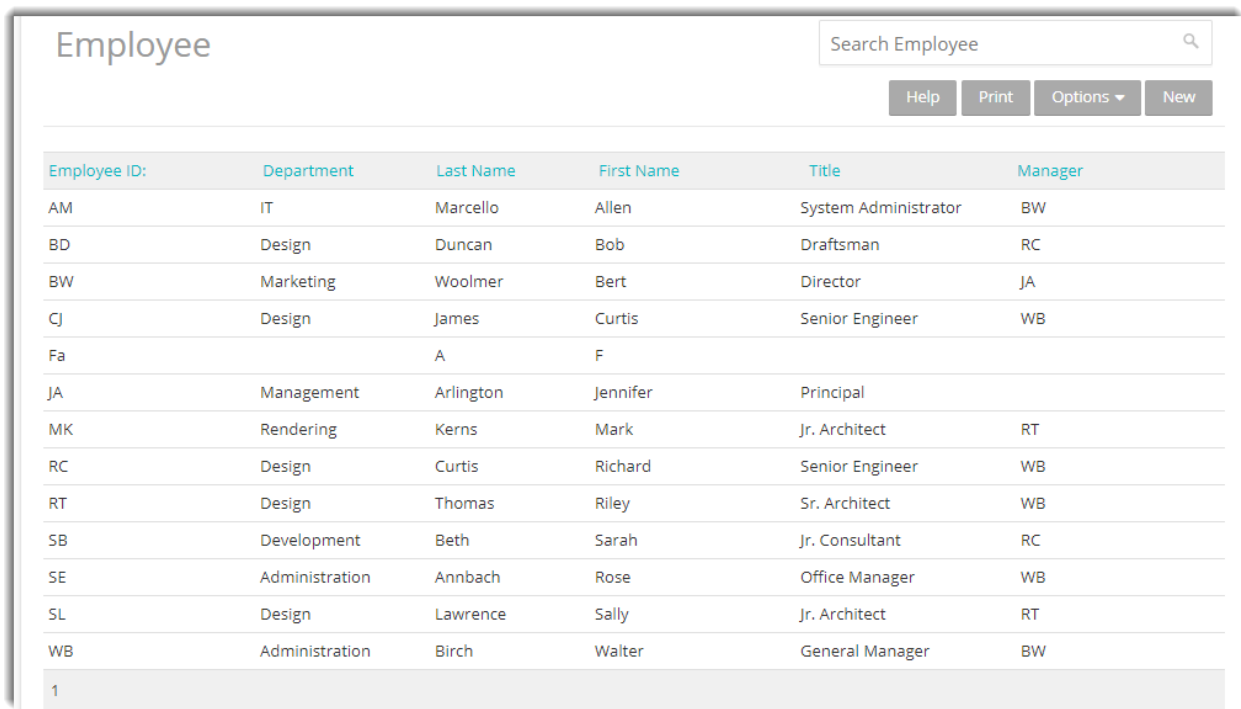
Your company information is now saved in the database. Let us look at the employee profile.

Employee Information

Employee screen represents a profile of a person working in a company on various activities and projects. This screen 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.

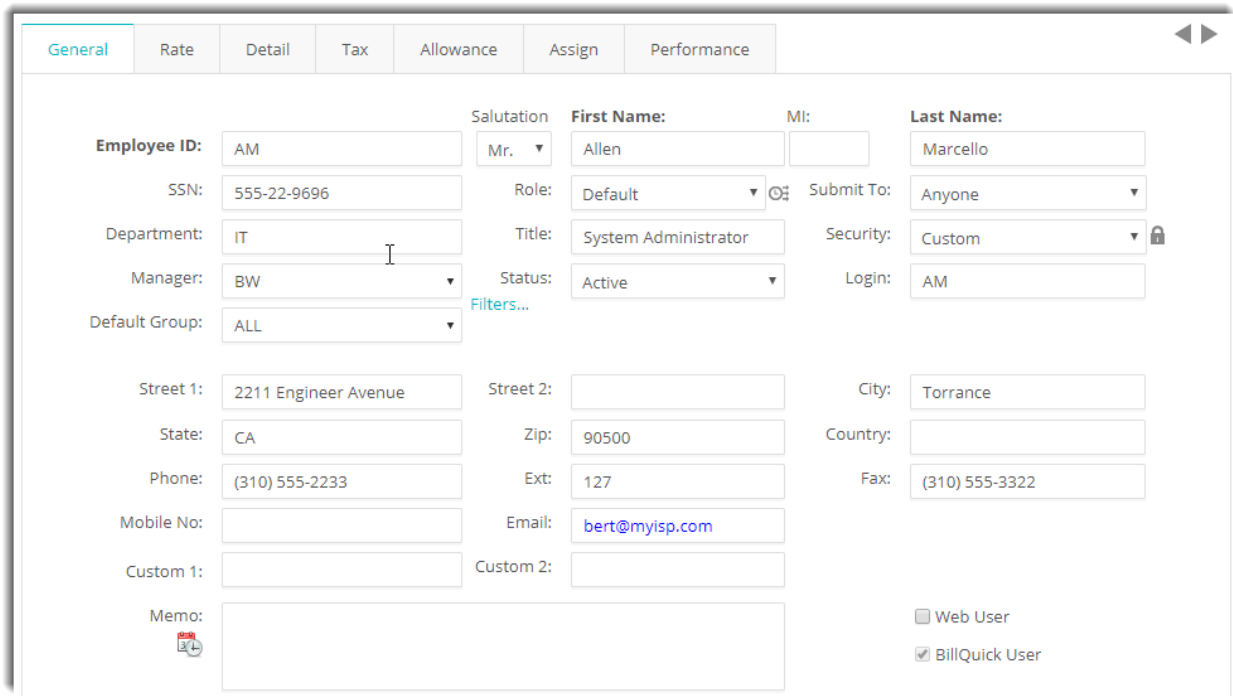
To create an employee profile:

- Select Employee from the Lists menu.
- 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	Manager
AM	IT	Marcello	Allen	System Administrator	BW
BD	Design	Duncan	Bob	Draftsman	RC
BW	Marketing	Woolmer	Bert	Director	JA
CJ	Design	James	Curtis	Senior Engineer	WB
Fa		A	F		
JA	Management	Arlington	Jennifer	Principal	
MK	Rendering	Kerns	Mark	Jr. Architect	RT
RC	Design	Curtis	Richard	Senior Engineer	WB
RT	Design	Thomas	Riley	Sr. Architect	WB
SB	Development	Beth	Sarah	Jr. Consultant	RC
SE	Administration	Annbach	Rose	Office Manager	WB
SL	Design	Lawrence	Sally	Jr. Architect	RT
WB	Administration	Birch	Walter	General Manager	BW

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



The screenshot shows the 'General' tab of an employee profile form. The fields are organized into several sections:

- Employee Information:** Employee ID (AM), SSN (555-22-9696), Department (IT), Manager (BW), Default Group (ALL).
- Personal Information:** Salutation (Mr.), First Name (Allen), MI (), Last Name (Marcello).
- Job Information:** Role (Default), Title (System Administrator), Status (Active), Submit To (Anyone), Security (Custom), Login (AM).
- Address Information:** Street 1 (2211 Engineer Avenue), Street 2 (), City (Torrance), State (CA), Zip (90500), Country (), Phone ((310) 555-2233), Ext (127), Fax ((310) 555-3322).
- Other Information:** Mobile No (), Email (bert@myisp.com), Custom 1 (), Custom 2 (), Memo ().

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 have finished, click Save and then Return.



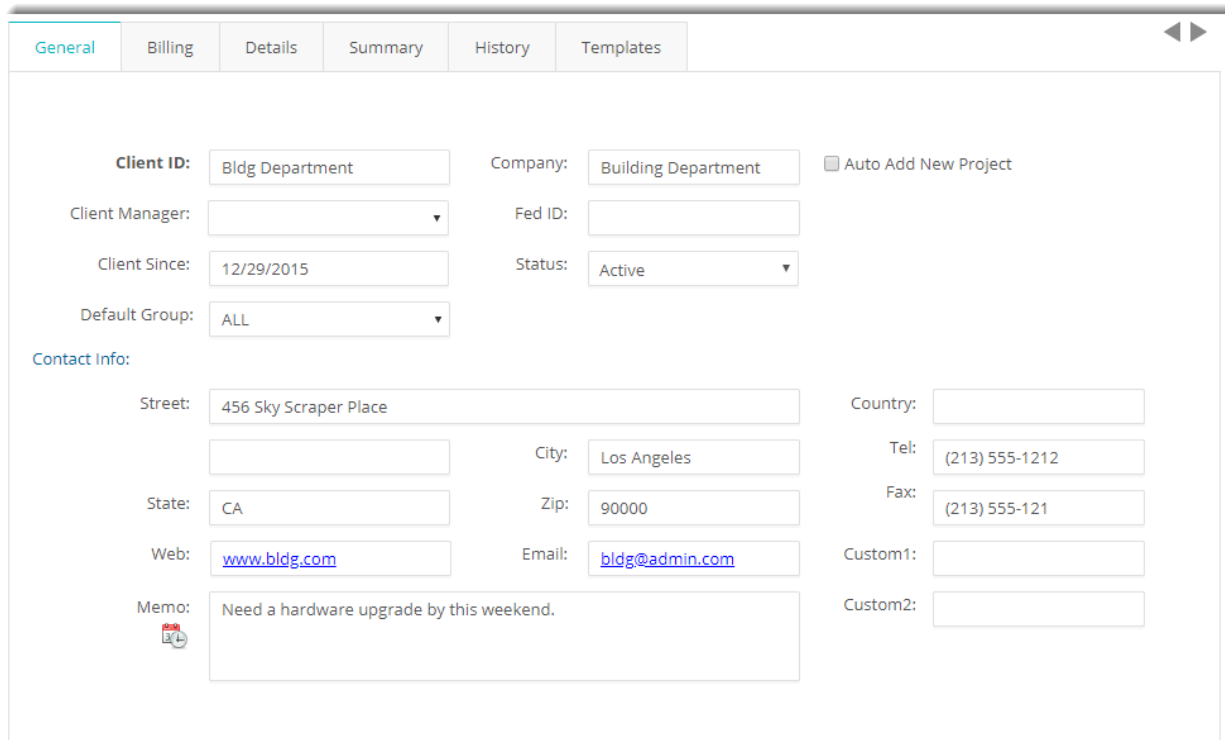
Similarly, you can create a vendor or subcontractor profile in the Vendor screen.

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. Select Client from the Lists menu.
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.



The screenshot shows the 'General' tab of a client profile in the BillQuick web suite. The form is organized into several sections:

- Client Information:** Client ID (Bldg Department), Company (Building Department), Client Manager (dropdown), Client Since (12/29/2015), Default Group (ALL), Fed ID, Status (Active), and an 'Auto Add New Project' checkbox.
- Contact Info:** Street (456 Sky Scraper Place), City (Los Angeles), State (CA), Zip (90000), Web (www.bldg.com), Email (bldg@admin.com), and a Memo field containing 'Need a hardware upgrade by this weekend.' There are also fields for Country, Tel ((213) 555-1212), Fax ((213) 555-121), Custom1, and Custom2.

4. The pointer is placed in the Client ID field automatically on the General tab. Enter the Client ID using letters or numbers.

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.

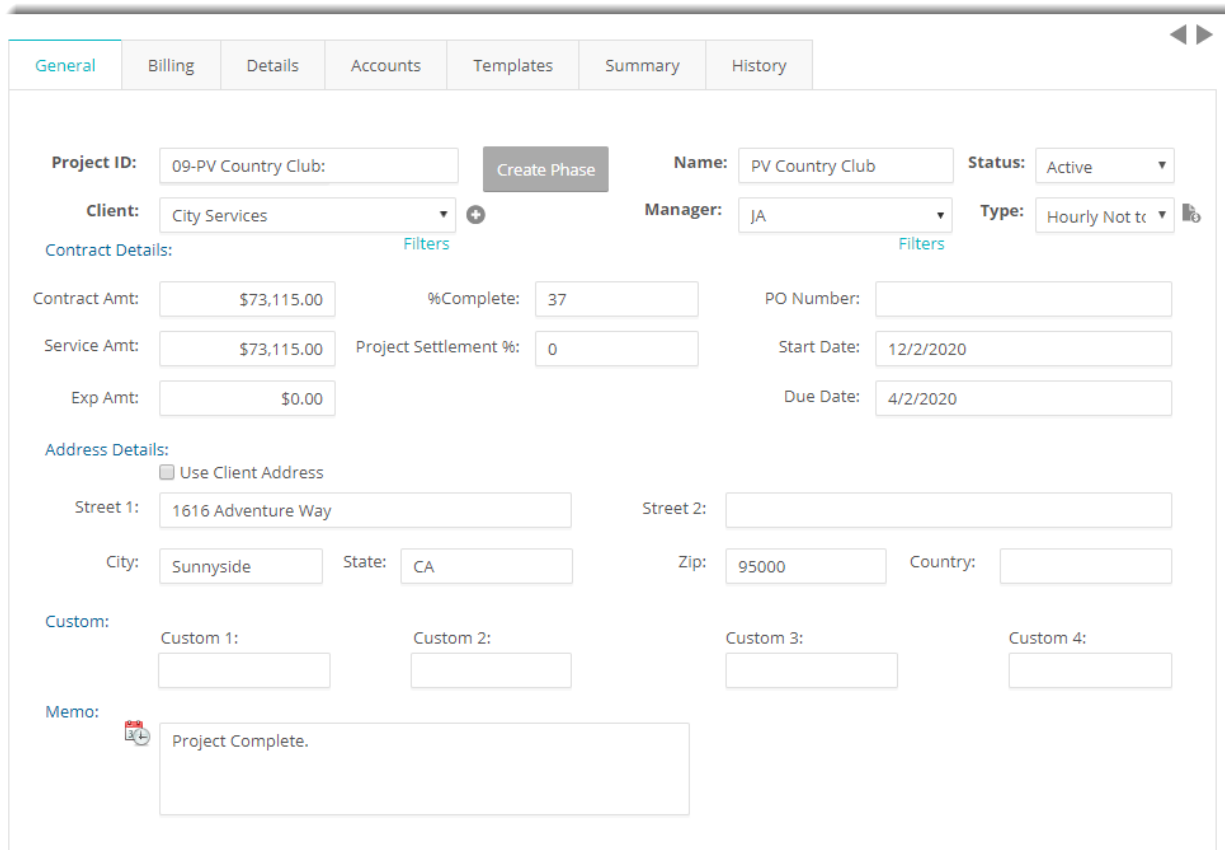
5. If desired, enter information on the other tabs as well.
6. When you have finished, click Save and then Return.

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. Select Project from the Lists menu.
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 'General' tab of a project form in the BillQuick web suite. The form is organized into several sections:

- Project Identification:** Project ID (09-PV Country Club), Name (PV Country Club), Status (Active), Client (City Services), Manager (JA), and Type (Hourly Not tr).
- Contract Details:** Contract Amt (\$73,115.00), %Complete (37), PO Number, Service Amt (\$73,115.00), Project Settlement % (0), Start Date (12/2/2020), Exp Amt (\$0.00), and Due Date (4/2/2020).
- Address Details:** Use Client Address (unchecked), Street 1 (1616 Adventure Way), Street 2, City (Sunnyside), State (CA), Zip (95000), and Country.
- Custom Fields:** Custom 1, Custom 2, Custom 3, and Custom 4.
- Memo:** Project Complete.

- The pointer is placed automatically 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.

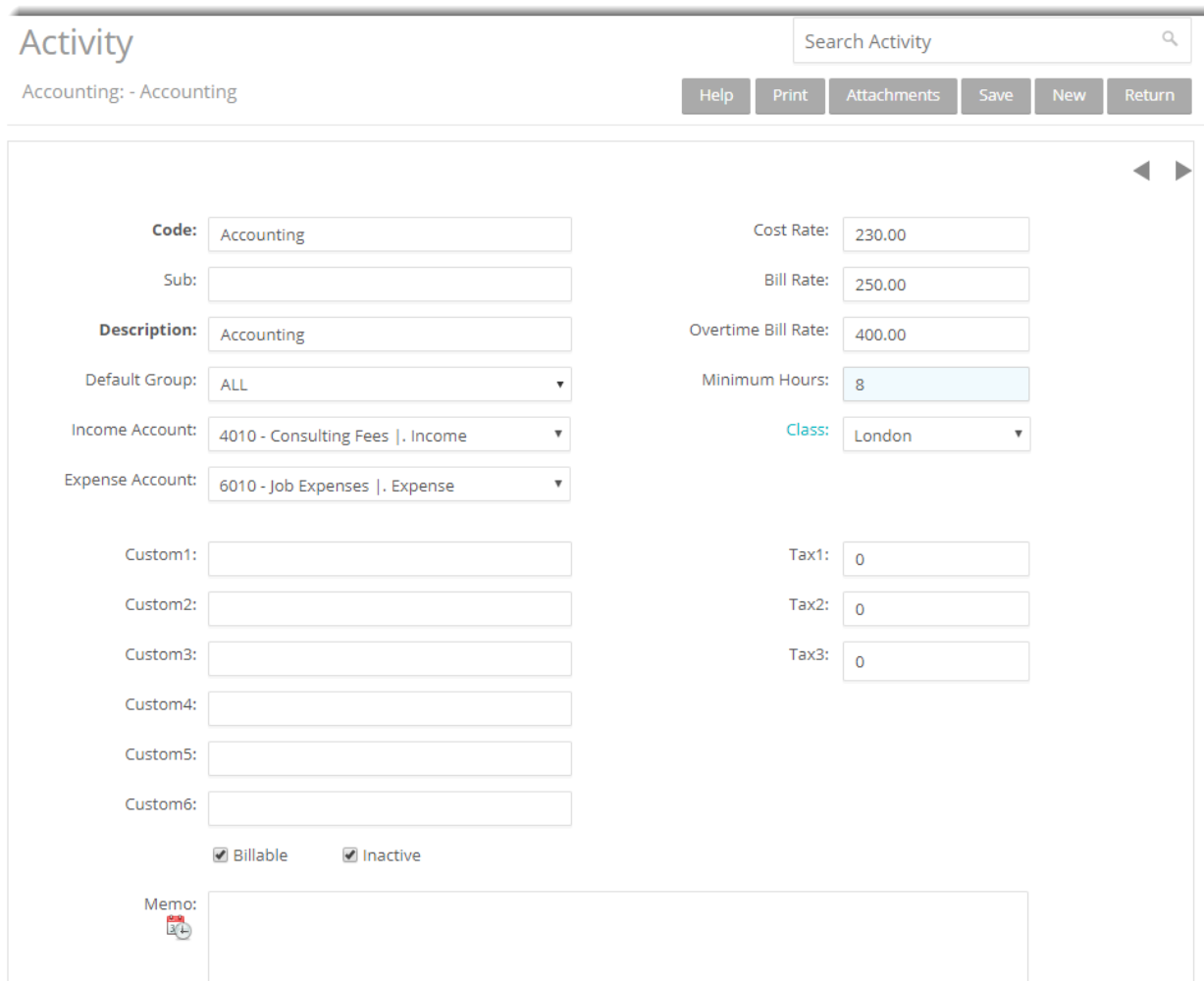
- Enter other required and relevant data such as Name, Client, Manager, Status, Address Details, and so on.
- In the Type field, select the type of contract used for this project (hourly, fixed, cost plus, and so on). If a fixed contract type is selected, be sure to fill in the Contract Details. Move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

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. Select Activity from the Lists menu.
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.



The screenshot shows the 'Activity' screen in the BillQuick web suite. The page title is 'Activity' and the breadcrumb is 'Accounting: - Accounting'. A search bar is located at the top right. Below the search bar are buttons for 'Help', 'Print', 'Attachments', 'Save', 'New', and 'Return'. The main form contains the following fields:

- Code:** Accounting
- Sub:** (empty)
- Description:** Accounting
- Default Group:** ALL (dropdown)
- Income Account:** 4010 - Consulting Fees | . Income (dropdown)
- Expense Account:** 6010 - Job Expenses | . Expense (dropdown)
- Cost Rate:** 230.00
- Bill Rate:** 250.00
- Overtime Bill Rate:** 400.00
- Minimum Hours:** 8
- Class:** London (dropdown)
- Custom1-6:** (empty text boxes)
- Tax1-3:** 0 (text boxes)
- Billable:**
- Inactive:**
- Memo:** (empty text area with a memo icon)

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.

Time Entry

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

- Simple Time Entry
- Timer
- Time Entry



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 Entry:

1. Select Time > Simple Time Entry on the navigation bar.
2. On the Simple Time Entry screen, you can view the existing weekly time entries in the Web Suite database.


Simple Time Entry

Help Copy Print Options Submit All Save Refresh


View By: Employee Employee Employee AM Period Including: 1/28/2020 More Filters: Show All

Project ID	Activity ID	Description	Sun 26	Mon 27	Tue 28	Wed 29	Thu 30	Fri 31	Sat 1	Total
09-PV Country Club:	AR:DC	Design Calculations								
09-PV Country Club:	Test activity:	test		2		2	8			12
09-PV Country Club:	Cad Plot:	CAD PLOTTING								
10-Harbor Bldg 42:	Web Serv:	Web Services		5		8		6		19
10-Crystal Blue Water:	Client Conf:	Client Conference/Meeting		2						2
10-Harbor Bldg 42:	Report:	Report/Letter				2		4		6
10-Harbor Bldg 42:	Conf Call:	Telephone Call/Conference								
10-Harbor Bldg 42:	CMR:	Computer Maintenance/Repa								
+ New				9		12	8	10		39

- Click New to open the Simple Time Entry in the entry view where you can record a new time entry.
- Select View By: Employee or Vendor (Sheet View enables you to view entries by Project also).
- Select the desired Employee from the list.
- 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.
- Enter or select the desired Project ID and Activity ID against which you want to record time.
- 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*).

- Enter the amount of time spent (in hours) on the project in the desired day or date field. Use decimals if needed.
- 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 have finished, 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 generate invoices quickly 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. Select Billing Review from the Billing menu.
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.

Billing Review


Help Add Print Notes Options Process Refresh Close

View By: Client From: Allied Tech To: Global Tech Filters Period: As Of 1/24/2020

J	Project ID	Hrs	Billable	Expenses	Discount	Retainer	Net Bill	Bill	%	Inv Date
i	10-Municipal O...	0.00	\$0.00	\$2,150.00	\$0.00	\$0.00	\$2,150.00	<input type="checkbox"/>	0	1/28/2020
i	10-City Health D...	5.00	\$300.00	\$389.66	\$0.00	\$0.00	\$689.66	<input type="checkbox"/>	0	1/28/2020
i	10-Crystal Blue ...	0.00	\$0.00	\$575.00	\$0.00	\$0.00	\$575.00	<input type="checkbox"/>	0	1/28/2020
i	10-Fun Foods:	1.00	\$100.00	\$0.00	\$0.00	\$0.00	\$100.00	<input type="checkbox"/>	0	1/28/2020
i	10-Green Thumb:	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>	0	1/28/2020
i	10-Harbor:	0.00	\$0.00	\$8,200.00	\$0.00	\$0.00	\$8,200.00	<input type="checkbox"/>	0	1/28/2020
i	10-Long Beach ...	119.00	\$9,156.00	\$0.00	\$0.00	\$0.00	\$17,000.00	<input type="checkbox"/>	0	1/28/2020
i	10-Municipal O...	0.00	\$0.00	\$150.00	\$0.00	\$0.00	\$150.00	<input type="checkbox"/>	0	1/28/2020
i	10-Municipal O...	0.00	\$0.00	\$810.35	\$0.00	\$0.00	\$810.35	<input type="checkbox"/>	0	1/28/2020
i	10-Redondo Lib...	0.00	\$0.00	\$3,750.00	\$0.00	\$0.00	\$3,750.00	<input type="checkbox"/>	0	1/28/2020
		125.00	\$9,556.00	\$16,025.01			\$33,425.01			

4. Use the Period drop-down list to select your billing period. You can call up information by month,

day, or any other 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 Close.

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:

1. Select Invoice Review from the Billing menu.
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.

Invoice Review

Help Options Export Email Attachments Action Update Preview Refresh

View By

Invoice No: Project: 09-PV Country Club: Client: Calculate Late Fee Up To: Calculate

Open Closed Posted Unposted Draft Late Fee Include Void Void Only

+ More

Invoice #	Date	Project ID	Net Amount	Paid	Balance	Amount
1209	1/24/2020	09-PV Country Club:	\$801.15	\$0.00	\$801.15	\$801.15
1208	1/21/2020	09-PV Country Club:	\$26.00	\$0.00	\$26.00	\$20.00
1207	1/21/2020	09-PV Country Club:	\$26.00	\$0.00	\$26.00	\$20.00
1206	1/21/2020	09-PV Country Club:	\$26.00	\$0.00	\$26.00	\$20.00
1205	1/10/2020	09-PV Country Club:	\$940.00	\$0.00	\$940.00	\$940.00
1161	5/21/2018	09-PV Country Club:	\$2,735.00	\$2,719.92	\$15.08	\$2,735.00
1150	7/25/2018	09-PV Country Club:	\$640.00	\$640.00	\$0.00	\$640.00



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

- Find the invoice generated in the last procedure (Billing Review) and then select it by selecting the check box to the left of it.
- Click Print to preview, print, or email the invoice.

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 a project basis.

To apply payments:

- Select Payments from the Billing menu.
- On the Payment screen, select your View By mode, say Client, and the desired Client ID.

Payment

History: Help Print Cancel Options Save Delete New Refresh

View By: Client Show Active Only

Client ID: Bldg Department Show Active Only

Project ID: 10-Staple Center: Show Active Only

Date: 1/28/2020

Pay Method: Check Apply as Retainer

Amount: 250000.00 Auto Apply

Reference: 0001

Memo:

Parent Project Retainer Available: \$0.00

Client Retainer Available: (\$10.00)

Project Retainer Available: \$0.00

Show Void Payments

Hide Paid Invoices

Hide Negative Invoices

Balance: \$4,438.00

Unused Payment: 245562.00

Apply	Amount Applied	Project ID	Invoice No	Invoice Date	Net Bill	Paid	Balance
<input checked="" type="checkbox"/>	<input type="text"/> 4438.00	10-Staple Center:	1148	3/21/2018	\$30,460.00	\$26,022.00	\$4,438.00

1

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. Alternatively, enter the amount in the Amount Applied field in the grid manually and check the Apply box.



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

6. When you have finished, click Save.

REPORTS

Reports compile and present recorded and processed information. Web Suite includes more than 500 reports and 180 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

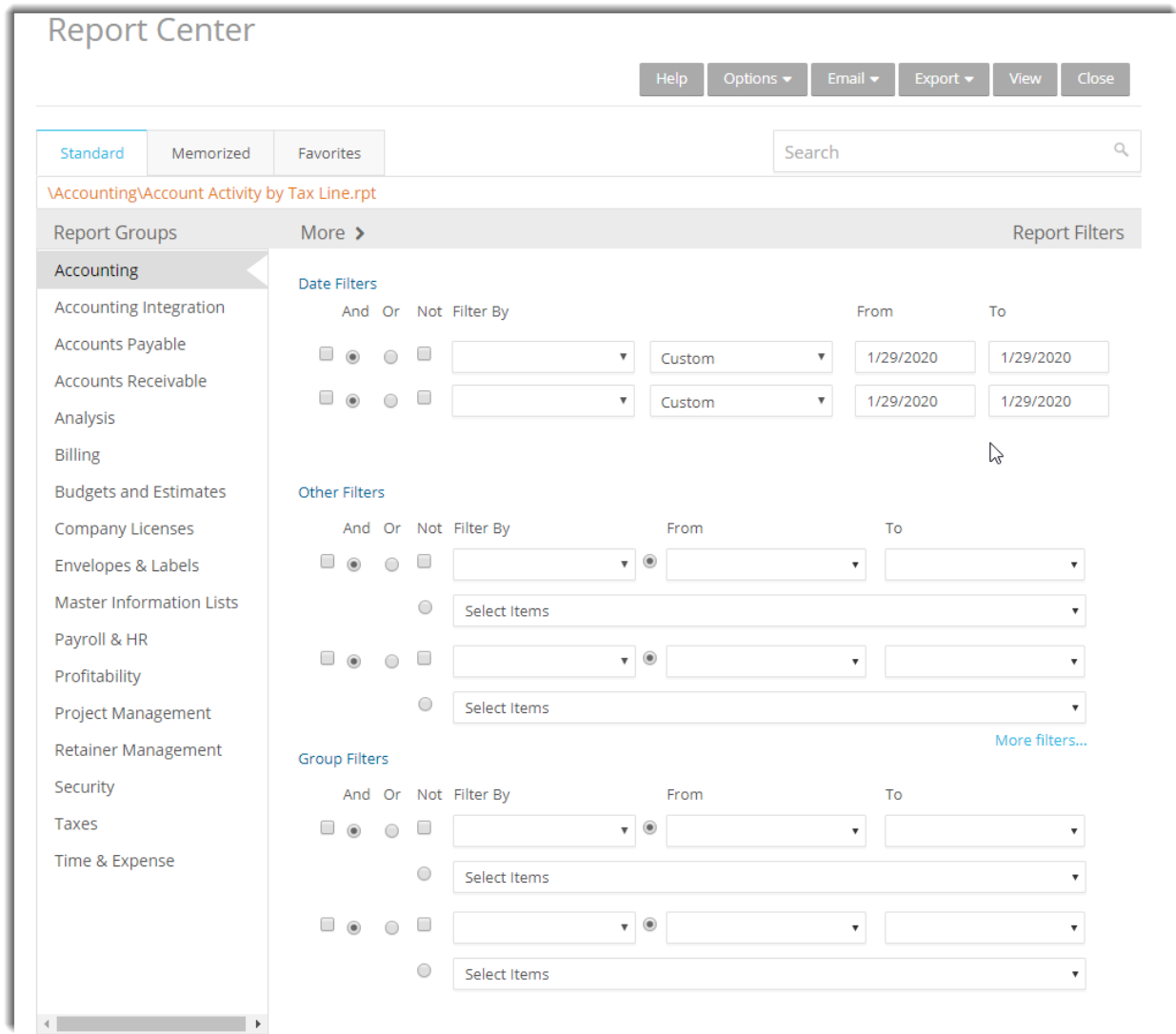
Reports contain information to help you understand what exists in your company database, what is due to you, the status of work being performed, utilization of resources, unbilled and billed work, and much more. Reports can be produced directly from the screens (in-context reports) or from the Report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

To view or print a report:

1. Select Report Center from the Reports menu.
2. On the Standard reports tab, select a report from the category list. The screen displays the selected report path at the top.

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.



The screenshot shows the 'Report Center' interface. At the top, there are buttons for 'Help', 'Options', 'Email', 'Export', 'View', and 'Close'. Below these are tabs for 'Standard', 'Memorized', and 'Favorites', along with a search bar. The main content area displays the report title 'Accounting\Account Activity by Tax Line.rpt' and a 'Report Filters' section. On the left, a sidebar lists various report categories under 'Accounting', with 'Accounting' currently selected. The 'Report Filters' section is divided into three main areas: 'Date Filters', 'Other Filters', and 'Group Filters'. Each area contains options for logical operators (And, Or, Not) and filter criteria (Filter By, From, To). The 'Date Filters' section shows two rows with 'Custom' filter types and dates set to '1/29/2020'. The 'Other Filters' and 'Group Filters' sections show similar structures with 'Select Items' dropdown menus. A 'More filters...' link is visible at the bottom right of the filter section.

4. You can also apply Group Filters by selecting them at the bottom.
5. After 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 have finished, click Close.



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 the [website](#). 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.



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