

Time Billing and Project Management Software

*Built With **Your** Industry Knowledge*

BillQuick Agent 2009 Getting Started Guide



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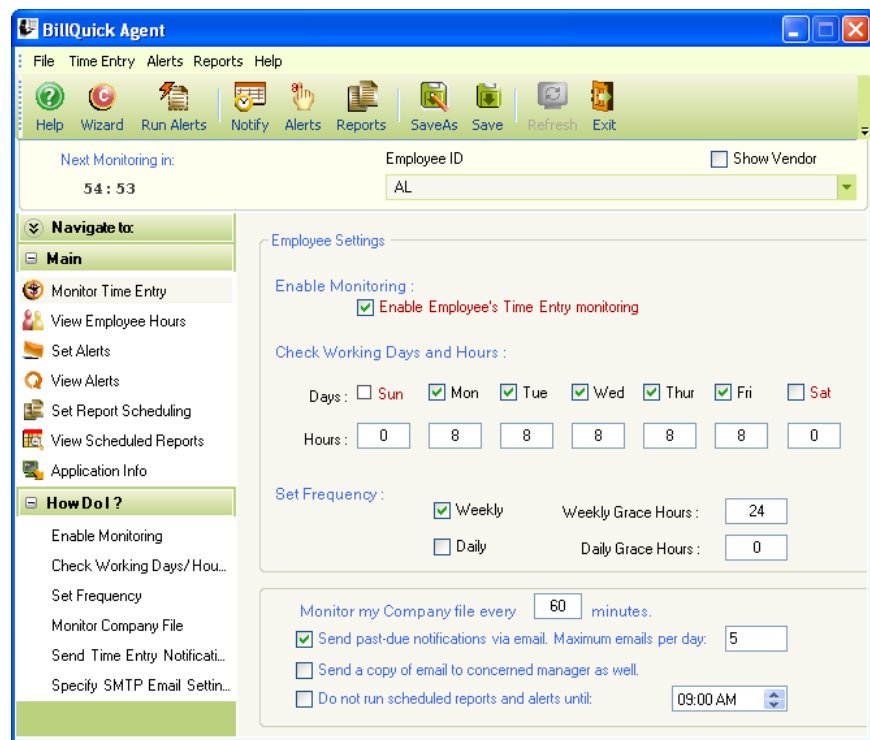
Introduction

Welcome to BillQuick® Agent from **BQE Software, Inc!**

BillQuick Agent is a powerful workflow automation tool that runs BillQuick automatically in order to reduce your overhead and keep your time more billable. It allows you to stay informed about your business without your having to manually run reports. It accomplishes this by performing critical administrative tasks—of report scheduling, time card monitoring and customized alerts!

The entire BillQuick Family is continuously improved, implementing user ideas and inspired features to make your solution more valuable. And BQE Software has listened to users and acted to improve the BillQuick Family for over ten years.

The goal of this **BillQuick Agent Getting Started Guide** is to help you interact with the Agent software. It explains the procedures involved in the setting up and running of Agent, focusing on its installation, activation and registration. This guide also explains some troubleshooting issues at the end, highlighting the most often encountered problems or queries of users. Thus, this guide enables a new Agent User or an IT/System Administrator to quickly educate himself on how to run and set up BillQuick Agent efficiently.



i *BillQuick Agent Getting Started Guide* is not a complete training solution. It is a guided tour designed to set up and run Agent. After completing the guide, we recommend that you explore the *BillQuick Agent 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.BillQuick.com and click on the Training tab.


System Requirements

To install BillQuick Agent and get it up and running, be sure your systems meet or exceed the requirements mentioned below.

Hardware Requirements

Each personal computer on which BillQuick Agent will be installed should meet or exceed the following requirements:


- 2.0 GHZ Intel Pentium IV-class processor or faster
- 512 MB RAM (1 GB recommended)
- 300 MB or more of hard disk space required, plus 130 MB additional hard disk space required for installation (430 MB total)
- DVD drive for installation from a DVD (BillQuick Agent can also be downloaded from www.BillQuick.com)
- 1024 x 768 screen resolution or more

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

Software Requirements

Operating System Requirements

- Microsoft Windows XP Home and Professional
- Microsoft Windows Vista (all flavors)
- Microsoft Windows 2003 Server, Windows 2008 Server

 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.

Other System Requirements

- BillQuick (Basic, Pro or Enterprise) edition
- .NET Framework 2.0 or later (automatically installed with BillQuick)
- SQL Server 7.0 or later (BillQuick Enterprise edition)

- Microsoft Data Access Components 2.8 or later (automatically installed with BillQuick)
- Microsoft Windows Installer 3.0 or later (typically installed or updated with Windows)
- Microsoft Internet Explorer 5.01 or later (for accessing BillQuick Online)
- An Internet connection with a 28.8Kb or faster modem, DSL, cable modem, or other broadband connection (for accessing BillQuick Online and for Automatic Updates)

Installation


Basic start-up procedures for BillQuick Agent involve a few quick steps:

1. Install BillQuick Agent
2. Activate and register Agent

Installation on a PC System


Agent can be installed on a single-user system or a networking environment. In a network environment, you will bring other users into the setup.

If you have a BillQuick DVD, proceed to the first step. If you prefer to download a copy of Agent, go to www.BillQuick.com and follow the steps.

 The downloaded copy of BillQuick Agent is in a Zip archive. You will need a Zip archiving or extraction program such as WinZip. If you do not have such a Zip program, please obtain one from a shareware web site or a software store.

Follow the steps below to install BillQuick on a personal computer.


1. Insert the BillQuick DVD in your drive or extract the files from the BillQuick Agent zip archive into a folder.
2. In case of a DVD, the installation program will start automatically. In the product selection screen, select BillQuick Agent as the product to install. If it does not, click Windows Start, select Run from the menu, and type:
`X:\ BillQuickAgent2009Setup.exe`
where X is the DVD drive letter
3. If you downloaded BillQuick Agent 2009, navigate to the folder where you placed the extracted files. Double-click Setup.exe.
3. When the first BillQuick Agent Installation screen appears, read the information and follow the instructions on each window. Once the installation begins, a progress bar displays.
4. When the Finished screen appears, click Finish. The installation is complete.

 On upgrading from Agent 2008 to 2009, data is automatically converted and upgraded to 2009.

Installation in a Network Environment

BillQuick Agent operates in a network environment, both peer-to-peer networks and ones with network servers. Agent software will be installed on the computer of each person who needs to access it. With the above steps complete on each personal computer, you will:


1. Install Agent (see *above*).
2. Make sure the BillQuick database is in a shared folder.
3. Point the user's copy of Agent to the database.
4. Register the computer with the BillQuick database.

 BillQuick Agent also works in other network scenarios. Contact BillQuick Support for more information (310-602-4030).


Peer-to-Peer Network Environment

To install on a peer-to-peer network:

1. On the computer used by your primary Agent user (BillQuick Supervisor), complete the steps for installing BillQuick Agent (see *above*), creating a database (see *Agent Database*), and activating Agent.

 BillQuick Agent automatically connects to the database that was last opened by BillQuick application on the computer.

2. Go to the first computer from which you want a user to access Agent. Install BillQuick Agent (*follow the steps above*).
3. Start BillQuick Agent.
4. Click the Browse button in the database info and navigate to the shared folder.
5. Select your BillQuick database. BillQuick Agent remembers the location each time the user opens BillQuick Agent.
6. With the database open, the Product Activation screen appears. Click on 'Already Purchased' and enter the license and registration key from the email you received from BQE Software. You can also cut - paste the keys, if desired.
7. Click Register.
8. Repeat these steps for each computer from which users will access Agent.

 If you want to run BillQuick Agent in evaluation mode, click 'Activate Now', and follow the steps. Read more about activation options later.

Network Server Environment

To install BillQuick Agent in a network server environment, you can:

1. Install BillQuick Agent, point to the BillQuick database, and register the computer (*follow the same steps as for a peer-to-peer network above*).
2. Utilize Active Directory Services on a domain network. With this capability, you can 'push' BillQuick Agent to the workstations.

For more information, see the BillQuick Knowledgebase article, 'How to Install BillQuick on Workstations using Active Directory Services' (<http://www.bqe.com/kbdetail.asp?KBID=305>).


Start-Up

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

BillQuick Database

To connect to the BillQuick database the first time you start up BillQuick Agent:

1. Select the database type in database options, e.g. Standard.

 If you are using MSDE or MS SQL database for BillQuick, you will have to enter Server Name, User ID, Password, and select the database from the dropdown.

2. Click the Browse button and navigate to the folder where your BillQuick Company database is stored.
3. Go to the next section, *Product Activation*.

Product Activation

After connecting with your BillQuick Company database, you will be prompted by a Product Activation screen. The screen provides four options.

1. **Activate Now** – Enter a key to continue your 30-day trial.
2. **Activate Later** – Continue your free 7-day period of review.
3. **Ready to Buy** – Go to BillQuick.com to purchase software licenses.
4. **Already Purchased** – Enter your license and registration keys to fully activate BillQuick Agent.



Agent Evaluation

If you are evaluating Agent, you may choose Activate Now or Activate Later. Click Activate Now to provide your details to BQE Software and obtain evaluation key. Activate Later allows you to continue working with Agent during a 7-day free trial. After this period you must obtain an evaluation key or a full software license.

1. Please enter valid information in the screen. This is how BQE Software will contact you with your evaluation, license and registration keys. When all the information is entered, click Next to continue.
2. Within a few minutes you will receive your 30-day evaluation key via email. Alternatively, you can generate an evaluation key via the web (<http://www.bqe.com/userservice/GetEvalKey2009.asp>) or by calling BQE Software at (310) 602-4020.
3. Enter this Evaluation Key in the space provided. Click Activate!
4. Agent will now open with a reminder message stating that you are using an evaluation copy and to continue beyond 30-days, you need to purchase the software.

While in evaluation mode, continue to use Agent. All of the information entered now will be saved and made available after switching from evaluation to licensed mode.

Product Activation

Please provide the following information below. Your evaluation key will be sent to the provided email address immediately.

[Click here if you already have a key](#)

Company Name: Professional Services Co.

Street: xyz street

City: xyz city

State: CA Zip: 90505

Email: xyz@pro.com

Phone: 789-689-5677

Back Cancel Next ?

We respect your privacy [Click here to read our Privacy Policy.](#)

Product Activation

An evaluation key has been sent to you via email. Please check your email. Then Copy the key and paste it below.

Company Name: Professional Services Co.

Evaluation Key: UJUM-7890-KJSM

Back Cancel Activate ?

If you have not received your evaluation key within 5 minutes, please try our web site. [Click here.](#)

Licensing & Registration

BQE Software offers various options for licensing and registering your copy of BillQuick Agent. You can use the Product Activation screen, Startup Interview or Product Licensing & User Management console in Agent to do so. Follow these steps to proceed:

1. When you are ready to purchase Agent, click 'I Am Ready to Buy' on the Product Activation screen and purchase your software license from the BillQuick website. Alternatively, you can call BQE Software at (310) 602-4020 and speak with a BillQuick Account Rep.
2. You will receive your license and registration keys via e-mail at the e-mail address that you provide.
3. Next, click the 'Already Purchased' option.
4. Enter the License Key and Registration Key exactly as printed on the email you received from BQE Software. If desired, you can cut - paste them from the email (if you want to make a change, contact your BillQuick Account Rep.).
5. In a networked environment, the Supervisor needs to repeat the same procedure on each computer.

 You can run the evaluation software and licensed software together.

Troubleshooting

Various technical issues related to the installation and initial start-up of BillQuick Agent are discussed here.

Error with SQL database

User gets an error in Agent when opening SQL database.

If the Agent is not connecting to the database, delete your registry and re-connect via the Startup Interview wizard. Select the right BillQuick SQL database to connect to. In case you have changed the location of your database, clear the registry for Agent and re-select the BillQuick database.

There could be a problem with the SQL Login security or BillQuick SQL might not be configured in the right way. Enter the right User ID and Password (either sa or admin).

Issue with scheduled reports

User has issues with running of scheduled reports in Agent 2007.

Your SMTP settings must be off and hence the server is unable to connect to it. Your IT Administrator can check the SMTP settings and also confirm whether the Firewall is blocking Agent connection to SMTP Server.

Congratulations! You have now successfully installed BillQuick Agent. To learn more about Agent, check the BillQuick Agent 2009 Help or BillQuick Agent Quick Start Tutorial or click www.bqe.com/ProductOverview .

For more information, visit us at www.bqe.com. If you have any trouble in using Agent, 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.