

Time Billing and Project Management Software

*Built With **Your** Industry Knowledge*

BillQuick Assistant 2009 Getting Started Guide



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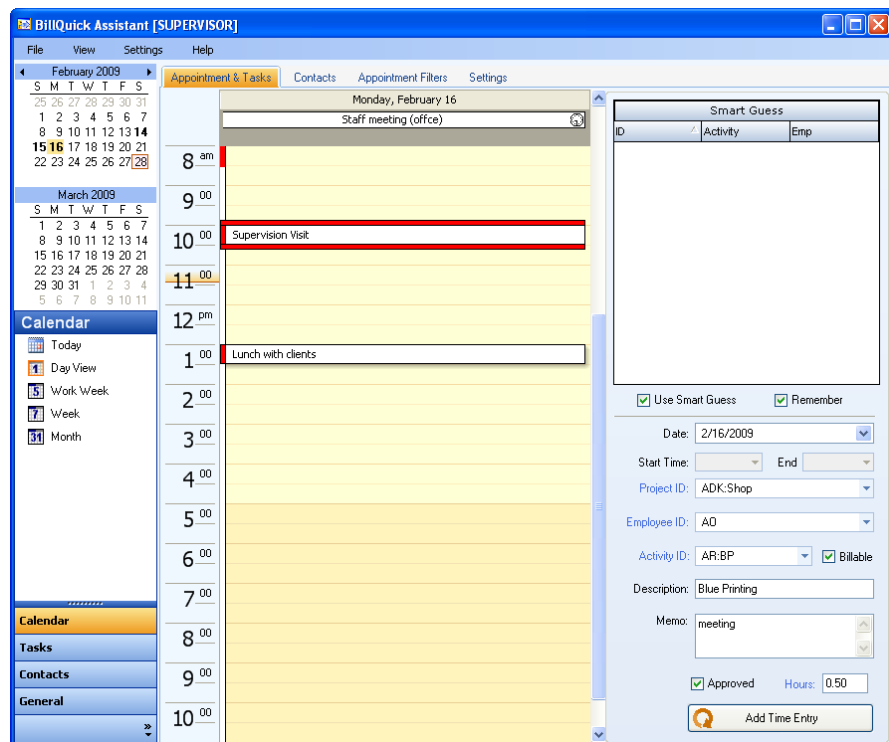
Introduction

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


Assistant easily converts your Microsoft Outlook appointments into time records. Pulling in your appointments, Assistant quickly completes your Time Card for you. It eliminates duplicate entry, saving time and effort tracking accurate and complete hours. Assistant also allows you to synchronize contacts. Settings and options in Assistant turn scheduled events in Outlook's Calendar into time entries in a single click!

BQE Software provides add-on products designed to match your business style and situation. 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.

 BQE offers Outlook Add-in which is embedded into Microsoft Outlook, enabling users to directly send appointments, etc to BillQuick.



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

 *BillQuick Assistant Getting Started Guide* is not a complete training solution. It is a guided tour designed to set up and run Assistant. After completing the guide, we recommend that you explore the *Assistant 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

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

Hardware Requirements

- 2.0 GHZ Intel Pentium IV-class processor or faster
- 512 MB RAM (1 GB recommended)
- 100 MB hard disk space
- DVD drive for installation from a DVD (Assistant can also be downloaded from www.BillQuick.com)
- 1024 x 768 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

- Microsoft Outlook 2003 or later
- BillQuick (Basic, Pro or Enterprise) edition
- .NET Framework 2.0 or later (automatically installed with BillQuick)
- SQL Server 7.0 or later (for 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 Assistant involve a few quick steps:

1. Install Assistant
2. Connect with BillQuick Database
3. Activate and register Assistant

Installation on a PC System

Assistant can be installed on a single-user system or a networking environment. It operates in a network environment, both peer-to-peer networks and ones with network servers. In either scenario the database will be located in a folder on a personal computer or shared drive.

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

 The downloaded copy of BillQuick Assistant is in a Zip format. 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 Assistant on a personal computer:

1. Insert the BillQuick 2009 DVD in your drive or extract the files from the Assistant zip archive into a folder.
2. In case of a DVD, the installation program will start automatically. In the product selection screen, select BillQuick Assistant as the product to install. If it does not, click Windows Start, select Run from the menu, and type:

`X:\ BillQuickAssistant2009Setup.exe`

where X is the DVD drive letter

If you downloaded BillQuick Assistant, navigate to the folder where you placed the extracted files. Double-click Setup.exe.

3. When the first BillQuick Assistant 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. When prompted, restart your computer to complete the installation.

Installation in a Network Environment

In a network environment, you will bring other users into the setup. Assistant 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 Assistant (see *above*).
2. Make sure the BillQuick database is in a shared folder.
3. Point the user's copy of Assistant to the database.
4. Register the computer with the BillQuick database.



BillQuick Assistant 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 Assistant user (BillQuick Supervisor), complete the steps for installing Assistant (see *above*), creating a database (see *BillQuick Database*), and activating Assistant.



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

2. Install BillQuick Assistant on the first computer from which you want a user to access Assistant (follow the steps *above*).
3. Start Assistant application.
4. You are prompted by the Startup Interview. Fill in the information as required and click next.
5. The Database Selection panel appears. Click on the Browse button in the database info and navigate to the shared folder.
6. Select your BillQuick database. BillQuick Assistant remembers the location each time the user opens the application.
7. The next screen displays the Registration panel, where you can enter the license and registration keys from the email you received from BQE Software. You can also cut - paste the keys, if desired. Click OK.
8. Repeat these steps for each computer from which users will access BillQuick Assistant.



If you leave the license and registration fields empty, BillQuick Assistant opens the 'Product Activation' screen where you can choose from various activation options. *Read more about Product Activation later.*

Network Server Environment

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

1. Install BillQuick Assistant, 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 Assistant 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>).

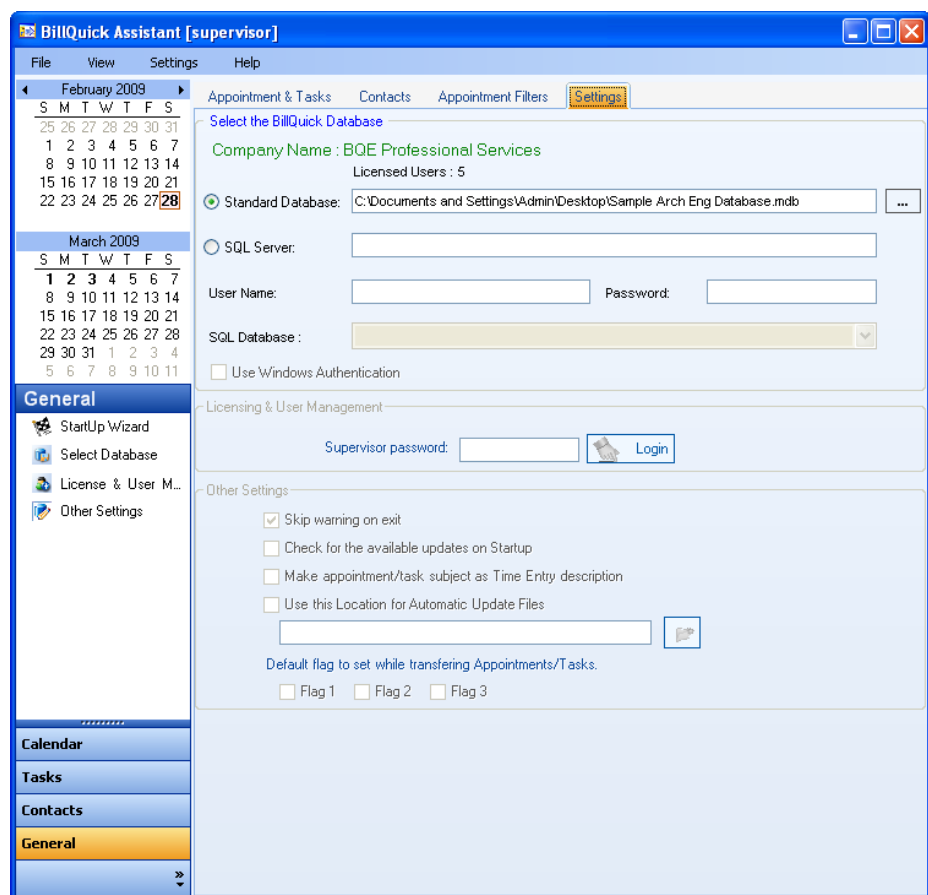
Start-Up

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

BillQuick Database

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

1. Go to the Settings tab. This displays the Company name, number of licensed Assistant users, and the location of the database.
2. If you wish to change the database, click the browse button and navigate to the folder where your BillQuick database is stored.
3. Select the desired database.



i If you are using SQL Server database for BillQuick, you will have to enter Server Name, Supervisor Password, and select the database from the dropdown.

4. On the Product Activation screen that appears, select your activation option.
5. Go to the next section, *Product Activation*.

Product Activation

After connecting to your company database, you will be prompted by Product Activation screen. The screen provides four options.

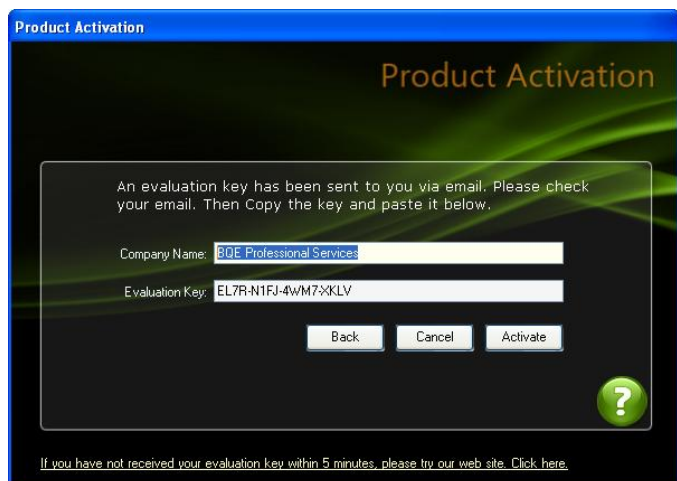
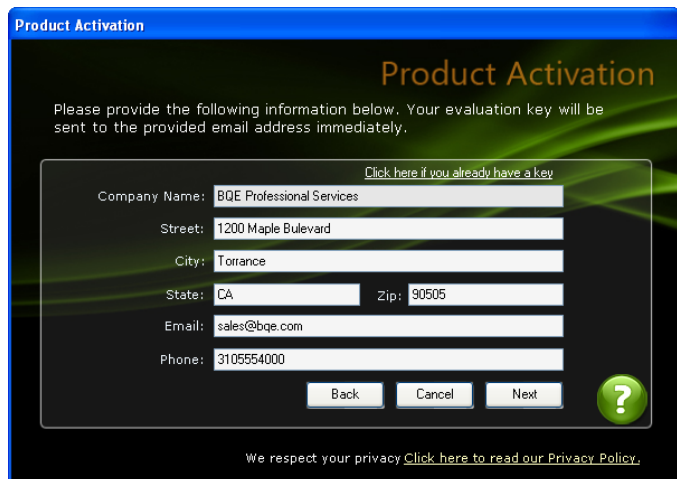
1. **Activate Now** – Enter a key to continue your 30-day trial.
2. **Activate Later** – Continue your free 7-day period of review.
3. **Ready to Buy** – Go to www.BillQuick.com to purchase software licenses.
4. **Already Purchased** – Enter your license and registration keys to fully activate Assistant.



Assistant Evaluation

If you are evaluating Assistant, 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 Assistant 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. Assistant will now open with a reminder message stating that you are using an evaluation copy of the software and to continue beyond 30-days, you need to purchase it.

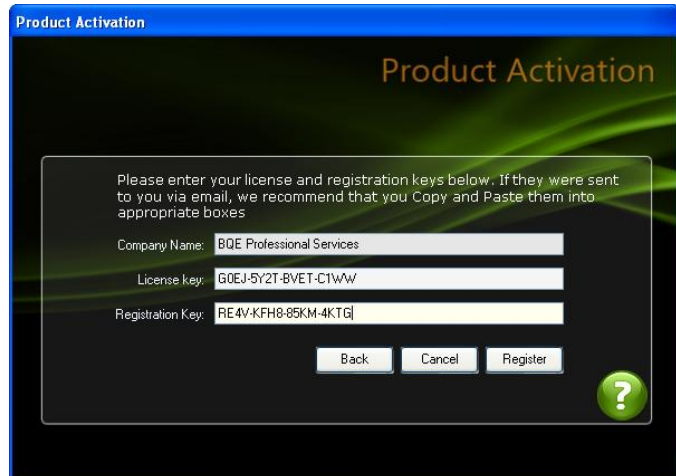


While in evaluation mode, continue to use Assistant. All of the information entered now will be saved and made available after switching from evaluation to licensed mode.

Licensing & Registration

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

1. When you are ready to purchase BillQuick Assistant, 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. After purchasing the license, click 'Already Purchased' option. It asks for your exact company name and license and registration keys.
3. Using the email you received, you would enter or cut-paste your company name (if you want to make a change, contact your BillQuick Account Rep) and keys.
4. Click Register. Assistant is now licensed for unlimited use.
5. In a networked environment, the Supervisor needs to repeat the same procedure on each computer.



The screenshot shows a 'Product Activation' window with a dark background and green light effects. The title bar says 'Product Activation'. The main heading is 'Product Activation' in orange. Below it, a text box says: 'Please enter your license and registration keys below. If they were sent to you via email, we recommend that you Copy and Paste them into appropriate boxes'. There are three input fields: 'Company Name' with the value 'BQE Professional Services', 'License key' with the value 'G0EJ-5Y2T-BVET-C1WW', and 'Registration Key' with the value 'RE4V-KFH8-85KM-4KTG'. At the bottom of the form are three buttons: 'Back', 'Cancel', and 'Register'. A green question mark icon is in the bottom right corner of the window.

 You can run the evaluation software and licensed software together.

Troubleshooting

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

Database problem

Upsized to MSDE database. Assistant cannot open old Access database.

Unfortunately, Assistant will not allow you to select another database after upsizing. Restart your application. Select the correct database in Assistant Startup Interview.

Assistant and MS Outlook

Installed BillQuick Assistant but cannot find it in my Outlook program.

BillQuick Assistant does not appear in Microsoft Outlook. It is a separate application that converts your Outlook appointments and tasks into BillQuick data. In your case, you need to install BillQuick Outlook Add-In which shall appear in your Outlook program (BillQuick menu) and enable you to directly send your Outlook data to BillQuick database.

Integration issue with Outlook

Unable to integrate Assistant with Outlook 2000.

BillQuick Assistant integrates with MS Outlook 2003 or later. Please upgrade your MS Office program from 2000 to 2003 or a later version.

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

BillQuick smoothly integrates with Intuit QuickBooks®, Microsoft® Office Accounting® (and free Microsoft Accounting Express), Sage Peachtree and MYOB (Australia). You can also easily and quickly convert Timeslips® and Wind2® data to BillQuick for free with our built-in conversion tools.

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