

Time Billing and Project Management Software

*Built With **Your** Industry Knowledge*

eTools 2009 Getting Started Guide



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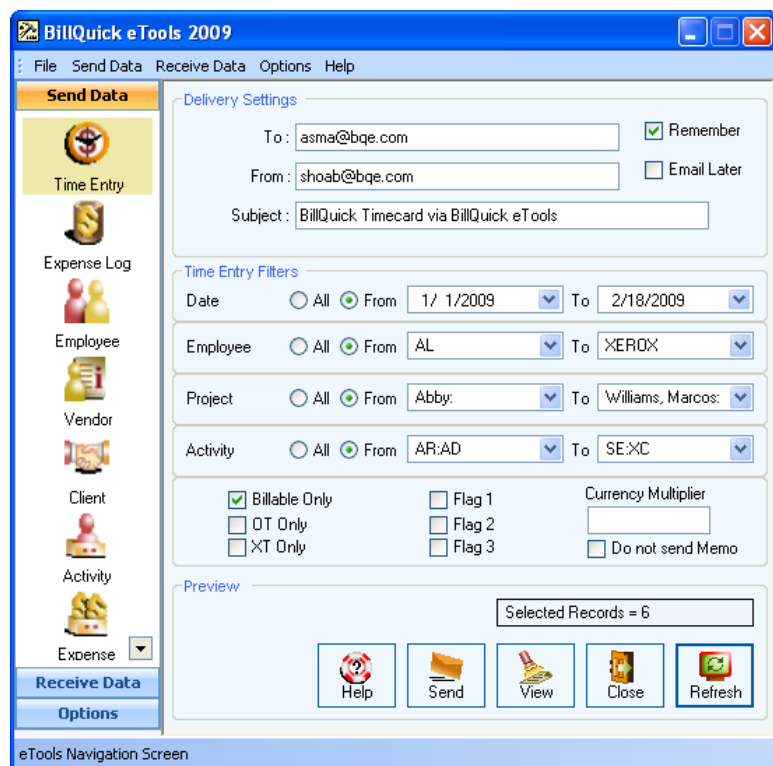
Introduction

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

BillQuick eTools offers an easy and efficient way to reduce the overhead of your business, remotely track professional hours, and increase your revenue. Many professional consultants spend most of their time out of their office. Some work from home and quite often submit or receive time cards, expenses, and other data by mail or fax. With the introduction of eTools, this remote data exchange is handled automatically via email. The time and expense records of your off-site consultants are now immediately available for generating invoices, for work in progress reporting, etc.

eTools incorporates flexible and robust features that let you adapt the software to your company. 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 eTools Getting Started Guide** is to help you interact with the eTools software. It explains the procedures involved in the setting up and running of eTools, 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 eTools user or an IT/System administrator to quickly educate himself on how to run and set up eTools efficiently.



i *BillQuick eTools Getting Started Guide* is not a complete training solution. It is a guided tour designed to set up and run eTools. After completing the guide, we recommend that you explore the *eTools 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 BillQuick eTools software, be sure your computer systems meet or exceed the requirements mentioned below.

Hardware Requirements

Each personal computer on which eTools 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)
- 25 MB hard disk space
- DVD drive for installation from a DVD (eTools can also be downloaded from www.billquick.com)
- At least 1024 x 768 screen resolution



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 2009 (Basic, Pro or Enterprise) edition.
- Internet mail account. It is recommended to have an Internet-style network account, which utilizes POP3 and/or IMAP4 protocols and Internet email programs like Eudora, Outlook Express or Outlook

- Microsoft Data Access Components 2.8 or later (automatically installed with BillQuick and eTools)
- 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)



BillQuick eTools provides MAPI Client (Outlook, Eudora, etc) and SMTP support for its email functionality.

Installation


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

1. Install eTools.
2. Connect to a BillQuick database.
3. Activate and register eTools.

Installation on a PC System

eTools 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 BillQuick 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 eTools, go to www.BillQuick.com and follow the steps. Follow the steps below to install eTools 2009 on a personal computer:

 The downloaded copy of eTools 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 eTools on a personal computer:

1. Insert the BillQuick DVD in your drive or extract the files from the eTools zip archive into a folder.
2. In case of a DVD, the installation program will start automatically. In the product selection screen, select eTools as the product to install. If it does not, click Windows Start, select Run from the menu, and type: X:\ eTools2008Setup.exe
where X is the DVD drive letter
4. If you downloaded eTools 2009, navigate to the folder where you placed the extracted files. Double-click Setup.exe.
5. When the first eTools Installation screen appears, read the information and follow the instructions on each window. Once the installation begins, a progress bar displays.
6. When the Finished screen appears, click Finish. The installation is complete.
7. 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. eTools 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 eTools (see *above*).
2. Make sure the BillQuick database is in a shared folder.
3. Point the user's copy of eTools to the database.
4. Register the computer with the BillQuick database.

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


Peer-to-Peer Network Environment

To install eTools on a peer-to-peer network:

1. On the computer used by your primary eTools user (BillQuick Supervisor), complete the steps for installing eTools (*as mentioned above*), connecting to a database (see *BillQuick Database*), and activating eTools (see *Product Activation below*).

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

2. Install eTools on the first computer from which you want a user to access BillQuick (*follow the steps above*).
3. Start eTools.
4. From the File menu, select BillQuick Standard (or Enterprise) Database, and navigate to the shared folder. Select your BillQuick database.
5. With the database open, select File, Registration.
6. Enter the Registration Key from the email you received from BQE Software. You can also cut - paste the key, if desired. Click OK.
7. Repeat these steps for each computer from which users will access eTools.

 If you want to run eTools in evaluation mode, click 'Activate Now' in Product Activation screen. Read more about activation options later.

Network Server Environment

To install eTools in a network server environment, you can:


1. Install eTools, point to the 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' eTools 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 eTools into the running mode please follow the steps below. At this point eTools should already be installed on your PC.

-  If the Product Activation screen opens, please select the relevant option (see *Product Activation* below).

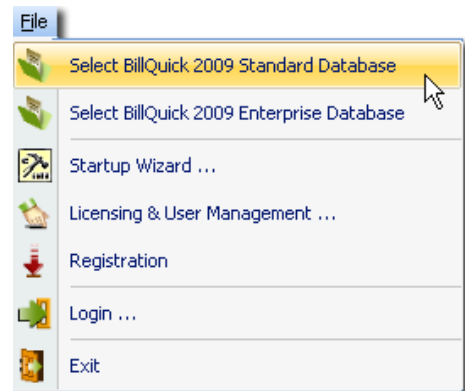
BillQuick Database

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

1. From the File menu, select BillQuick Standard Database.
2. Select the type in database options, e.g. Standard.

-  If you are using MSDE or MS SQL database for BillQuick, you will have to select BillQuick Enterprise Database from the File menu.

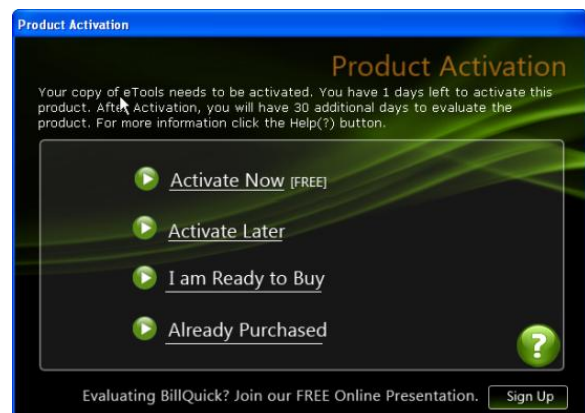
3. Click the Browse button and navigate to the folder where your BillQuick company database is stored.
4. Go to the next section, *Product Activation*.



Product Activation

When eTools is in the evaluation mode the Product Activation screen displays. The screen provides four options.

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




eTools Evaluation

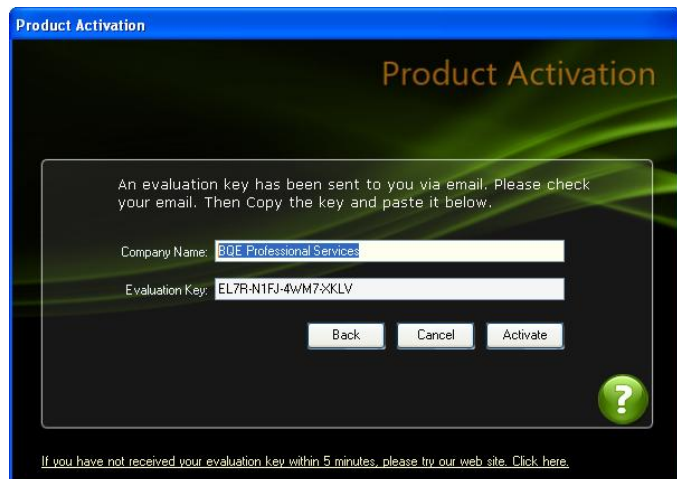
If you are evaluating eTools, you may choose Activate Now or Activate Later option. Click Activate Now to provide your details to BQE Software and obtain evaluation key. Activate Later allows you to continue working with eTools during a 7-day free trial. After this period you must obtain an evaluation 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. eTools 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 eTools. All of the information entered now will be saved and made available after switching from evaluation to licensed mode.



The screenshot shows the 'Product Activation' window with a title bar. The main heading is 'Product Activation'. Below it, a message reads: 'Please provide the following information below. Your evaluation key will be sent to the provided email address immediately.' There is a link: 'Click here if you already have a key'. The form contains the following fields: Company Name: BQE Professional Services; Street: 1200 Maple Boulevard; City: Torrance; State: CA; Zip: 90505; Email: sales@bqe.com; Phone: 3105554000. At the bottom, there are 'Back', 'Cancel', and 'Next' buttons, and a help icon (question mark). A footer note says: 'We respect your privacy. Click here to read our Privacy Policy.'



The screenshot shows the 'Product Activation' window with a title bar. The main heading is 'Product Activation'. Below it, a message reads: 'An evaluation key has been sent to you via email. Please check your email. Then Copy the key and paste it below.' The form contains the following fields: Company Name: BQE Professional Services; Evaluation Key: EL7R-N1FJ-4WM7-XKLV. At the bottom, there are 'Back', 'Cancel', and 'Activate' buttons, and a help icon (question mark). A footer note says: 'If you have not received your evaluation key within 5 minutes, please try our web site. Click here.'

Licensing & Registration


eTools offers various options for licensing and registering your copy of the software. You can use the Product Activation screen, Start-up Interview or Product Licensing & User Management console in BillQuick. Follow these steps to proceed:

1. When you are ready to purchase and license eTools, click 'I Am Ready to Buy' option on the Product Activation screen. Purchase your license from the BillQuick website or call BQE Software at (310) 602-4020 to 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. After purchasing a full software license, click 'Already Purchased' on the Product Activation screen. It asks for your company name, license and registration keys.
4. Using the email you received, enter or cut-paste the information. It should be exactly the same as you see in the email (if you want to make a change, contact your BillQuick Account Rep.).
5. Click Register. eTools is now licensed for unlimited use.
6. 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 a blue title bar. The main title 'Product Activation' is in orange. Below it, a white box contains the following text: '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 white box are three buttons: 'Back', 'Cancel', and 'Register'. A green circular help icon with a white question mark is located in the bottom right corner of the window.

 When you evaluate eTools, you can run the evaluation software and licensed software together.

Troubleshooting

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

Registration Fails

Upon entering the Registration Key in eTools, I get the following message: 'There was a problem recording your registration key'.

This can be due to one of the following reasons:

1. It may be that you are already registered. If you try to enter the Registration Key again, after having registered once, it displays a message that the registration was not successful. When you start eTools, it will display a reminder message indicating that you are using eTools in evaluation mode. If you did not see that reminder, chances are that you are already registered.
2. The key you are typing in is incorrect. Verify that you are typing the correct key. In order to avoid any typing errors, we suggest that you copy the key from the email and paste it.

Error in sending data via eTools

User gets the following error message when trying to send data using eTools: 'Error in sending data via eTools. SMTP server not responding.'

eTools communicates directly with your outgoing mail server using Simple Mail Transport Protocol, commonly referred to as SMTP. The following are the most common reasons for getting this error when using eTools:

1. Your SMTP email server is not running or has stopped temporarily. Check by pinging your email server. Example: Ping servername.com
2. Your SMTP server is configured to work on a different port (by default eTools uses Port 25). Check with the Network administrator for the correct port number your SMTP server is listening to. Then use the correct port number when using eTools.
3. Your SMTP server has been configured to send/receive email only for a specific list of users.
4. Your SMTP server does not work as a relay server. Which means that you must have a valid email account on the server; otherwise it won't allow you to send email.

To test your SMTP server, you can use the Telnet utility. Please follow these steps to test your email server:

1. At command prompt, type Telnet and press Enter
2. Connect using the IP address and port number of your SMTP server
3. Type
HELO [Enter]
Mail from: [Enter]
RCPT To: [Enter]

Data [Enter]
Type your test message
Quit [Enter]

If Quit and pressing the Enter key does not get you out of data mode, you may want to try [Enter].[Enter] (press Enter Key, then a dot, and then the Enter key again).

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

Many professionals or employees are often out of the office and may not be able to get back to their desk in time to fill in their time card or expense log. BillQuick Web Suite, BillQuick Palm, BillQuick CE and BillQuick Mobile also give you 'access anywhere' capability. Check out www.bqe.com/Products for more details.

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