

Getting Started Guide



BillQuick Agent Getting Started Guide

Built With Your Industry Knowledge

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Introduction

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

BillQuick Agent is a workflow automation tool that runs BillQuick automatically in order to reduce your overhead and keep your time and expense more billable. BillQuick Agent has powerful reporting features for project managers, company administrators and executives that allow them to stay informed about the business without having to manually run reports. It accomplishes this by performing critical administrative tasks of report scheduling, time and expense monitoring and customized alerts!

In addition to report automation, BillQuick Agent monitors employee time entries based on a set of rules. It automatically checks for incomplete time or expense entries and sends email reminders to the delinquent employees. In addition, it sends business alerts when specific conditions are met or events are triggered.

The goal of this **BillQuick Agent 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 BillQuick Agent, focusing on its installation, activation, registration, basic and main functionalities such as time card monitoring, notification, report scheduling, and custom alerts. Thus, this Guide enables you to quickly educate yourself on how to run and utilize BillQuick Agent effectively and efficiently. It also explains some troubleshooting issues at the end, highlighting your most often encountered problems or queries.



BillQuick Agent Getting Started Guide is not a complete training solution. It is a guided tour designed to set up and familiarize you with BillQuick 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 [Services](#) for more.

BillQuick Agent Setup Checklist

| | ✓ Task | Resources and References |
|-------------------------|--|---|
| <u>Pre-Installation</u> | <input type="checkbox"/> Check our system requirements | Software Requirements Hardware Requirements |
| <u>Installation</u> | <input type="checkbox"/> Download BillQuick Agent setup | Support Downloads |
| <u>Installation</u> | <input type="checkbox"/> Install BillQuick Agent | Installation on a PC system Installation on Network Environment Upgrade to Agent 2014 |
| <u>Start-Up</u> | <input type="checkbox"/> Start BillQuick Agent 2014 | Start Up BillQuick Agent |
| <u>Start-Up</u> | <input type="checkbox"/> Create or open your company file | BillQuick Database |
| <u>Start-Up</u> | <input type="checkbox"/> Log into Agent | Login |
| <u>Start-Up</u> | <input type="checkbox"/> Activate and license Agent | Product Activation License and Registration |

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
- 1024 MB RAM
- 300 MB or more of hard disk space required, plus 130 MB additional hard disk space required for installation (430 MB total)
- 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

Here are the operating and other software requirements for BillQuick Agent.

Operating System Requirements

- Microsoft Windows 2012, 2008, 2003 Server
- Microsoft Windows 8, Windows 7, Windows Vista, Windows XP



Be sure to install the latest Windows service packs and critical updates. Check the Microsoft website for the latest updates to Windows, .Net Framework, and Data Access Components. Some versions of Windows include an Automatic Update option.

Other System Requirements

- BillQuick (Basic, Pro or Enterprise) edition
- .NET Framework 2.0 or later (automatically installed with BillQuick)
- SQL Server 2008 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)
- An Internet connection with a 1Mbps or faster modem, DSL, cable modem, or other broadband connection (for Automatic Updates)

Installation

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

1. Install BillQuick Agent
2. Activate and register BillQuick Agent



Before installing the software, please read the [End User License Agreement](#) (EULA).

Installing on a PC System

BillQuick 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.

To download a copy of BillQuick 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 website or a software store.

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

1. Extract the files from the BillQuick Agent zip archive into a folder.
2. If you downloaded BillQuick Agent 2014, navigate to the folder where you placed the extracted files. Double-click the program file (Setup.exe).
3. When the first BillQuick Agent Installation screen appears, read the information and follow the instructions on each window. After the installation begins, a progress bar displays.
4. When the Finished screen appears, click Finish. The installation is complete. Open the Readme file for additional information regarding running Agent as a service on a 64-bit Windows system.



On upgrading from BillQuick Agent 2013 to 2014, data is automatically converted and upgraded to 2014. See the [Upgrade](#) section for more.

Installing in a Network Environment

BillQuick Agent operates in a network environment, both peer-to-peer networks and ones with network servers. It 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 BillQuick Agent (*see above*).
2. Make sure the BillQuick database is in a shared folder.
3. Point the user's copy of BillQuick 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).

Installing in a 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 BillQuick Agent Database*), and activating BillQuick Agent.



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

2. Go to the first computer from which you want a user to access BillQuick Agent. Install the software (*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. Repeat these steps for each computer from which users will access BillQuick Agent.



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

Installing in a 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 Knowledge Base article, 'How to Install BillQuick on Workstations using Active Directory Services' ([KB article](#)).

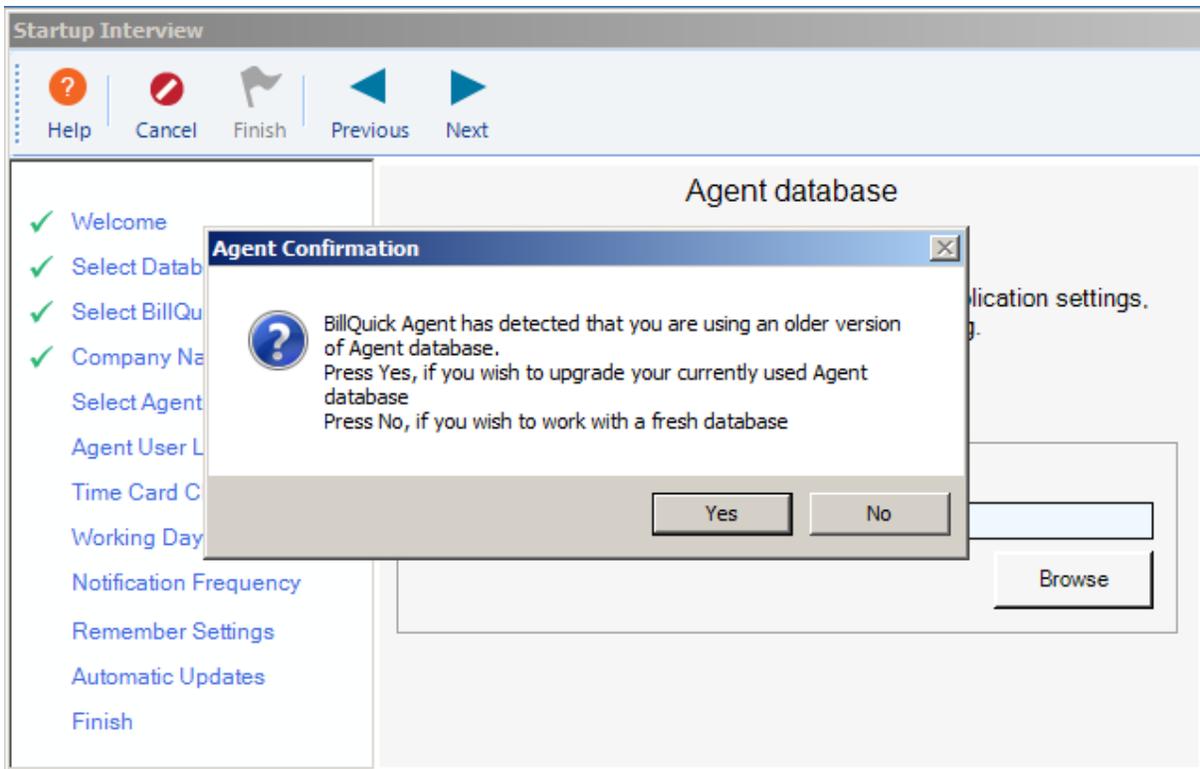
Upgrading from a Previous Version

Before you begin the upgrade process, you must download and install BillQuick 2014 and the latest 2014 version of [BillQuick Agent](#).

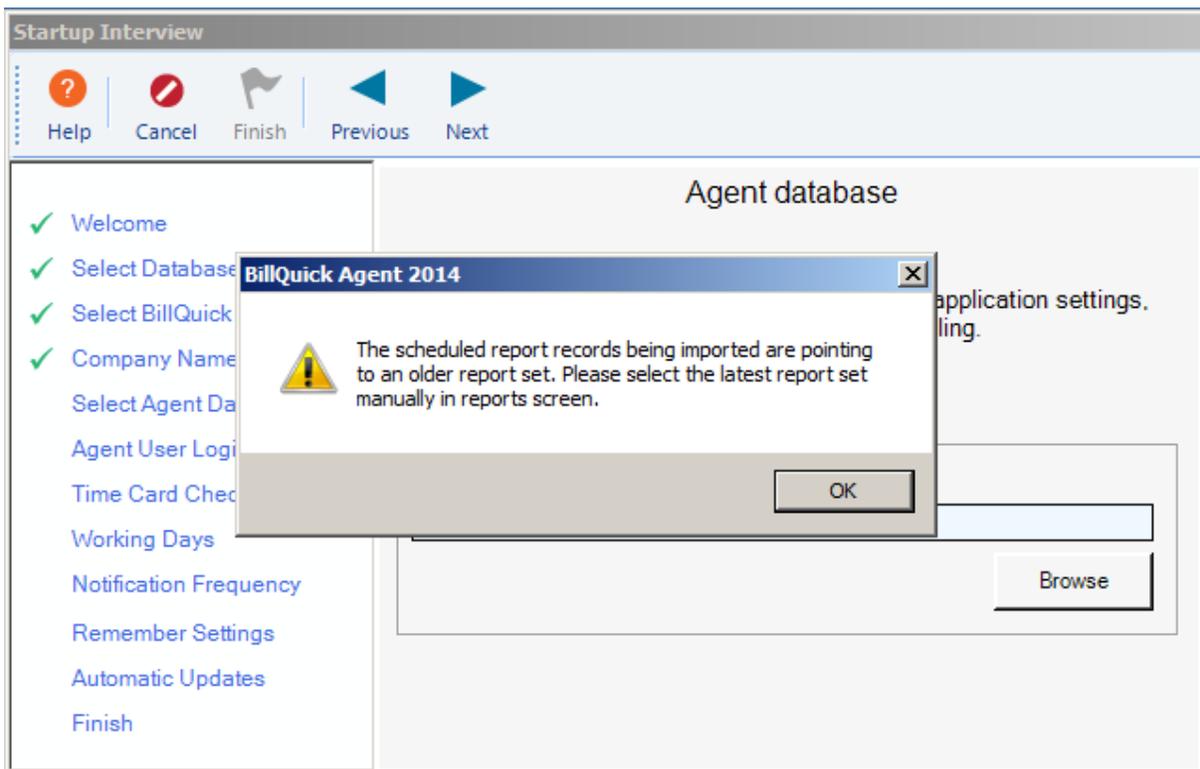
The BillQuick Agent 2014 program installs separately from your current version (2013 or below). You can choose to upgrade your current version or just uninstall it. If you want to uninstall it, do so from Control Panel, Add/Remove Programs. When upgrading from one version of BillQuick Agent to another, it allows you to migrate your settings.

Please follow the steps below to upgrade to BillQuick Agent 2014:

1. Download the latest version of the BillQuick Agent 2014 from the Support Downloads section of our [website](#). It is the first file listed there and includes all previous service packs and updates.
2. Install BillQuick Agent as explained above.
3. Double-click the BillQuick Agent 2014 desktop icon to start the program.
4. Upon opening BillQuick Agent 2014 for the first time, you will be prompted with the Startup Interview. This wizard will detect your previous Agent databases (Agent.mdb and Alerts.mdb) and give you the option of converting your previous database or starting with a new one. Choose Yes.



5. You also have the option to update any previous report schedules created in prior versions or start with a new database with no scheduled reports. If you choose Yes, you will be directed to update the report folder location manually to the new report set in the Agent 2014 folder.



6. Next, if you have any custom reports, these need to be copied to the new report location. By default, the report set will be installed in the same folder as BillQuick Agent 2014, under the subfolder Reports.
7. In a network environment, install BillQuick Agent on each computer as explained above.
8. After BillQuick Agent 2014 is set up and configured, you can uninstall the previous version and the related service, if it is running.

After you have upgraded your company database, you can activate your upgraded product. *Please read the [Activating Product](#) section for more.*



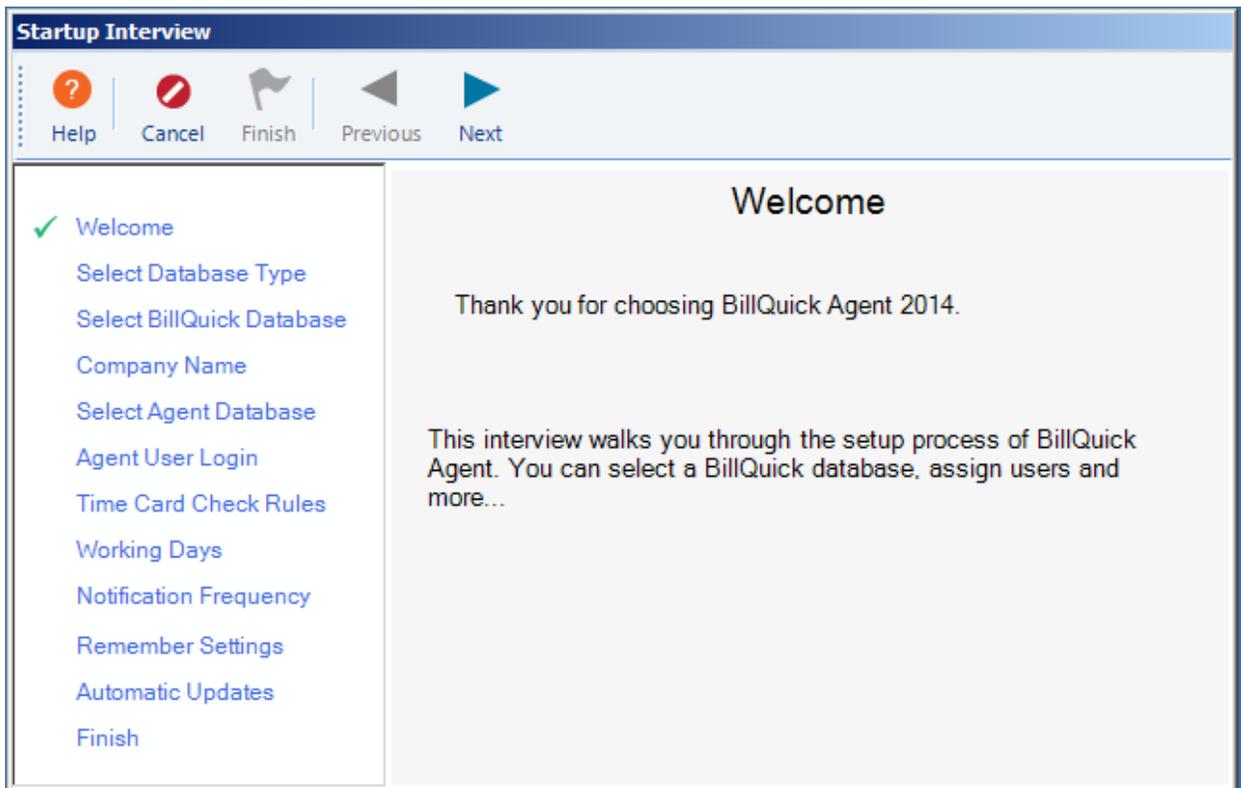
If you are experiencing problems while upgrading the program, please check the [Knowledge Base Articles](#) for troubleshooting and technical issues. Else, contact us at (310) 602-4030 or support@bqe.com.

Start-Up

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

Connecting to BillQuick Database

BillQuick Agent’s functionality depends on the BillQuick program database and hence you need to connect to it. When you start up BillQuick Agent for the first time, you are prompted with the BillQuick Agent Start-Up Interview.



Enter the following information:

- **Database Type:** Select the type of database, Access (Standard) or SQL Server (Enterprise), required for BillQuick Agent. If you choose the automatic detection option, it will automatically retrieve the currently used BillQuick database.

 If you are using an SQL database for BillQuick, you have to enter the SQL Server Name, User ID, Password, and select the database from the drop-down.

- **Select Database:** Specify the BillQuick Database for using BillQuick Agent. You have the option to 'Open an existing BillQuick Standard Database' or 'Open an existing BillQuick Enterprise Database'.
- **BillQuick Agent Database:** Agent uses a separate database to save program settings, employee details, reports scheduling information, and so on. The program will automatically create this file and retrieve it. You can place this database at the desired location locally or on a shared server.

The wizard will prompt existing users to upgrade your Agent database. *Please see the [Upgrade section](#) for that.*

After you have created a new company database or upgraded your existing one, you are prompted to activate your product.

Activating Product

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



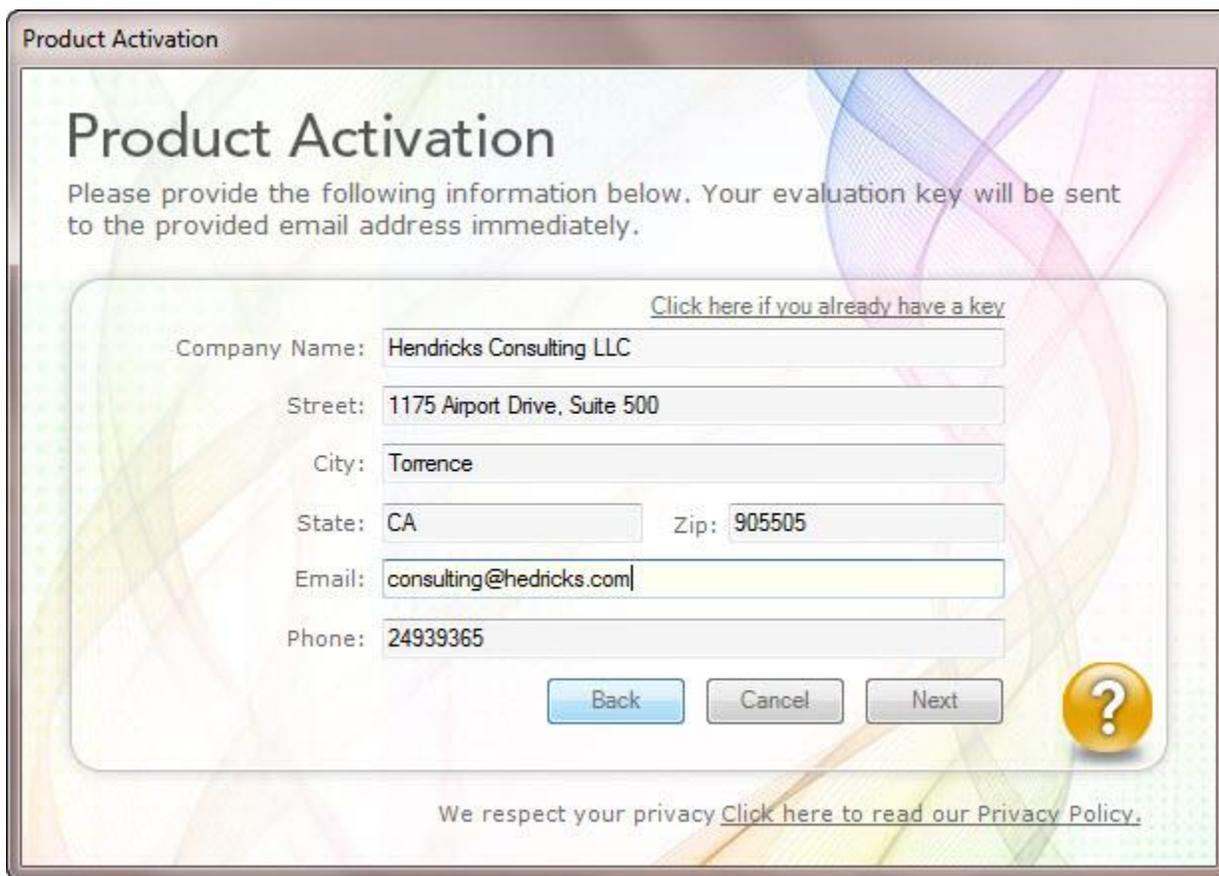
- **Activate Now** – Enter a key to continue your 30-day trial.
- **Activate Later** – Continue your free 7-day period of review.

- **I am Ready to Buy** – Go to BillQuick.com to purchase software licenses.
- **Already Purchased** – Enter your license and registration keys to fully activate BillQuick Agent.

Evaluating BillQuick Agent

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 an evaluation key. Activate Later allows you to continue working with BillQuick 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.



The image shows a screenshot of a 'Product Activation' window. The window title is 'Product Activation'. The main heading is 'Product Activation'. Below the heading, it says 'Please provide the following information below. Your evaluation key will be sent to the provided email address immediately.' There is a link that says 'Click here if you already have a key'. The form contains the following fields: Company Name: Hendricks Consulting LLC; Street: 1175 Airport Drive, Suite 500; City: Torrence; State: CA; Zip: 905505; Email: consulting@hedricks.com; Phone: 24939365. At the bottom of the form are three buttons: Back, Cancel, and Next. There is also a yellow question mark icon. At the bottom of the window, it says 'We respect your privacy Click here to read our Privacy Policy.'

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](#) or by calling BQE Software at (310) 602-4020.
3. Enter this Evaluation Key in the space provided. Click Activate!

4. BillQuick 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 BillQuick Agent. All of the information entered now will be saved and made available after switching from evaluation to licensed mode.

Licensing and Registering

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 BillQuick Agent to do so.

Follow these steps to proceed:

1. When you are ready to purchase BillQuick 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 email at the email address that you provide. This applies to the upgrade users as well.
3. Click the Already Purchased option and verify your Company Name.
4. Enter both the License Key and Registration Key that were emailed to you. **The keys are created based on your Company Name**; so if you change the name here, you may need a different set of keys to be created and sent. *Please contact BQE Sales at sales@bqe.com or (310) 602-4020.*
5. After you enter the keys and click Register, you need to restart BillQuick Agent for the key to be fully validated.
6. In a network environment, the Supervisor needs to repeat the same procedure on each computer.



You can run the evaluation software and licensed software together.

Using BillQuick Agent as a Service

Agent can run as a service. 'Run as a service' means that Agent is installed on your network drive (server machine recommended) and runs continuously, tracking time or expense sheets, running reports and monitoring activity for a possible alert. An email is sent via SMTP or MAPI from your server. Regardless of how the information is saved in your company database – from BillQuick, Web Suite or an add-on module, the database will be monitored by Agent automatically.

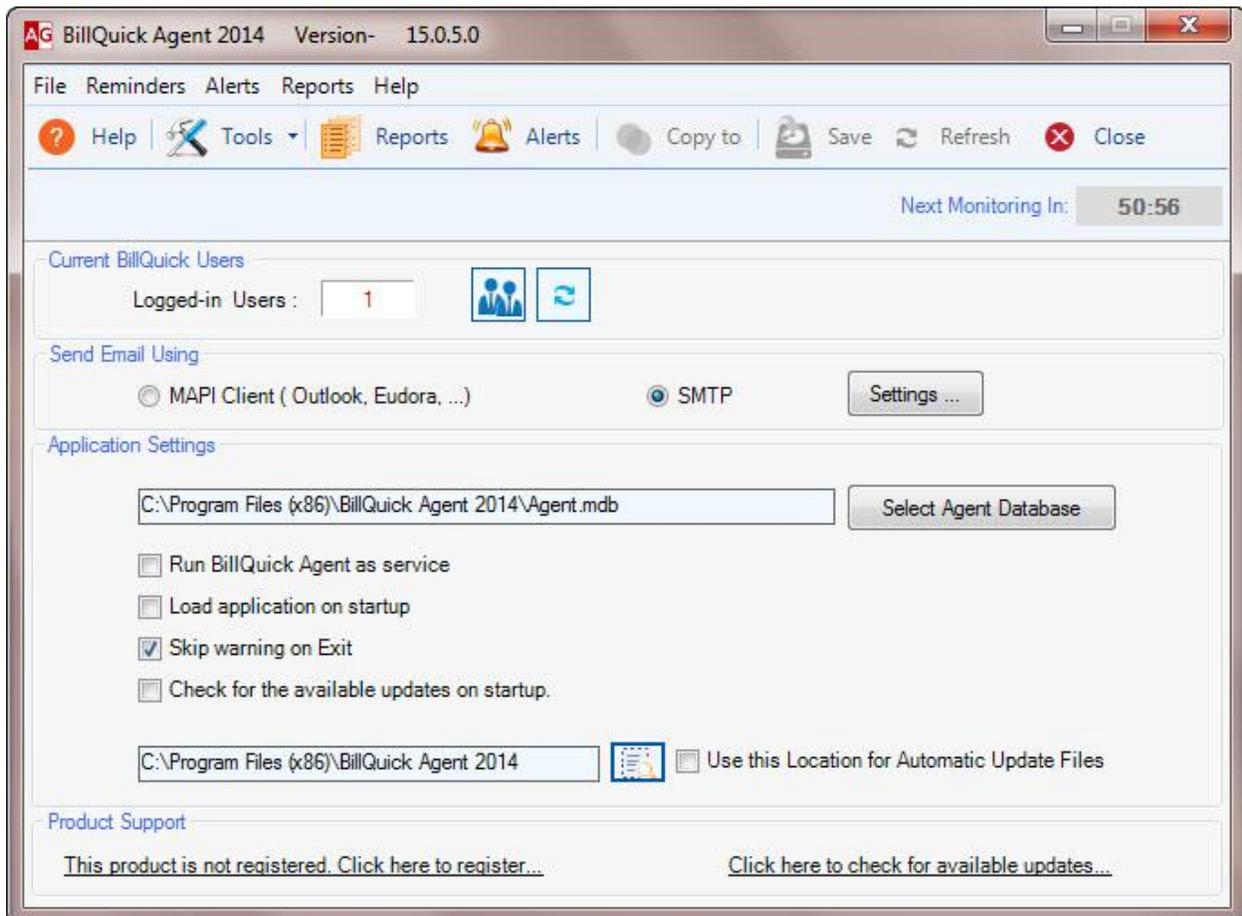
We recommend this solution for customers who:

- Prefer to operate BillQuick Agent without being dependent on a user's computer to be running,

- Do not want to send email notifications or reports using your desktop email
- Want Agent to take up less memory on their system

After installing BillQuick Agent on your network server, do the following:

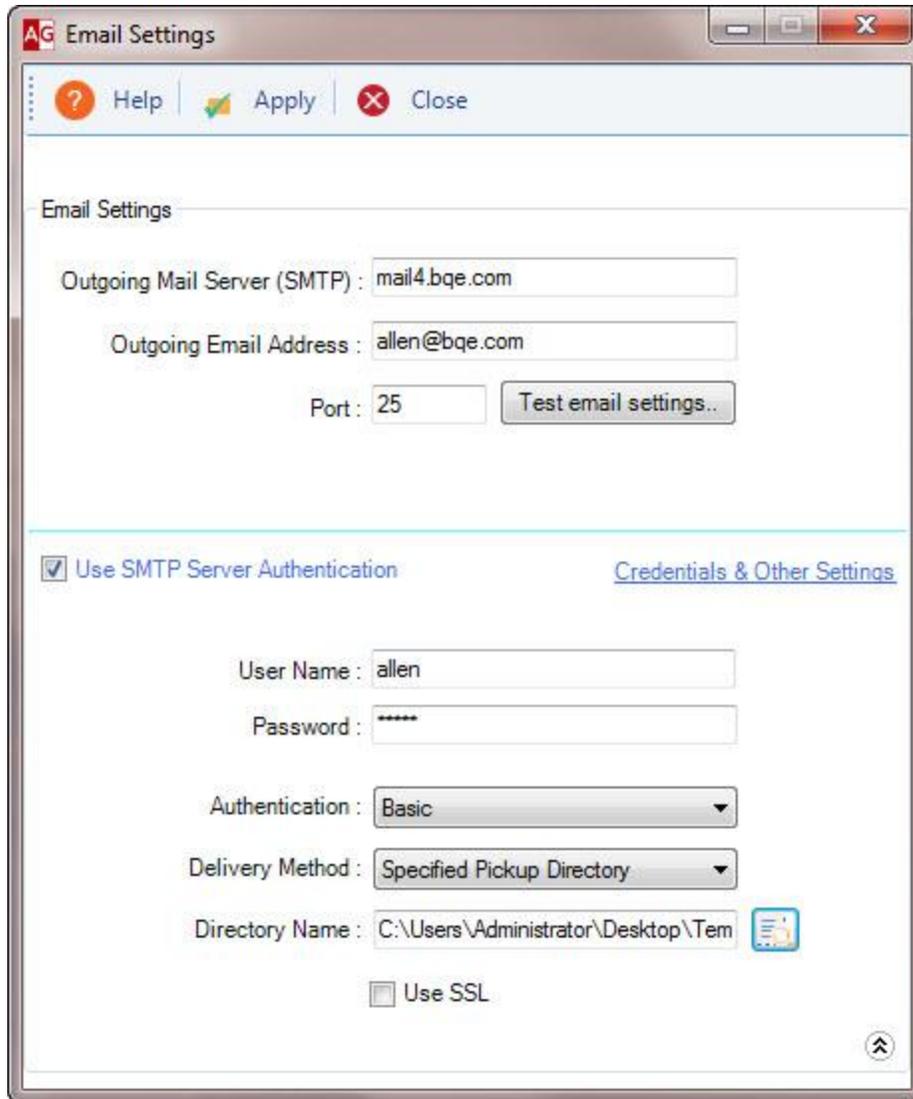
1. Open BillQuick Agent and select Application Settings from the File menu.



2. Select SMTP Email Settings option in the 'Send Email Using' section.

 SMTP is more popular because you can send emails from your email account or company's email server. MAPI can be used if you are not running Agent as a service and have it installed on your computer only.

3. Click Settings. In the Email Settings screen, enter the SMPT email settings and other information. If needed, click Advanced Settings and enter additional information.



 Before applying these settings, click Test Email Settings to verify the SMTP settings that you have specified for sending emails. If there is a problem, contact your IT or system administrator for help.

4. Back on the screen, in the Application Settings section, check the option 'Run BillQuick Agent as Service'. A message box pops up informing you about the tasks performed by it.
5. Click OK and then exit from the program.

 You cannot run BillQuick Agent desktop program and BillQuick Agent service at the same time. The 'Load application on startup' option is automatically unchecked when you check the 'Run Agent as Service' option.

BillQuick Agent Basics

This section focuses on the basics of the BillQuick Agent environment. It covers:

- Starting up Agent
- Logging into Agent
- Navigating Agent

 Captions, field labels, field masks, and tool tips can be customized to your Company's preference. Changes made in BillQuick Custom Labels screen get reflected in this program as well.

Starting Up

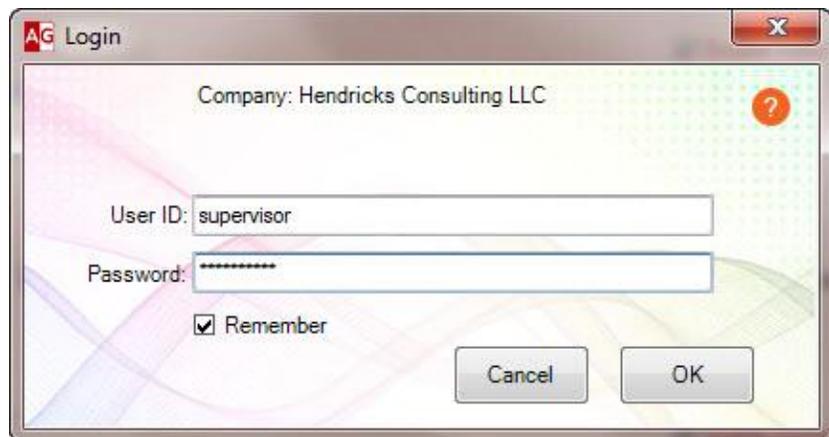
BillQuick Agent's functionality depends on the BillQuick program database. If you have previously worked with BillQuick Agent on your computer, it will remember the previous settings. You can skip to **Log-in** below.

Else, you will be prompted by the BillQuick Agent Start-Up Interview to connect to the BillQuick database. After you have successfully established connection and security is turned on, you will be prompted for a login.

Logging In

To use BillQuick Agent, you need to log in with a User ID and Password. Your manager or supervisor will provide you with an ID and password. For now, use these defaults

User ID: supervisor
 Password: supervisor



Navigating

After logging in to BillQuick Agent, you can access important sections and functions of the program using any of the two navigation options provided.

- Menu Bar
- Toolbar

Menu Bar

A horizontal menu bar with a light gray background, containing the text 'File Reminders Alerts Reports Help'.

BillQuick Agent organizes functions into menus.

Toolbar

Various options are available on the main toolbar.



Time and Expense

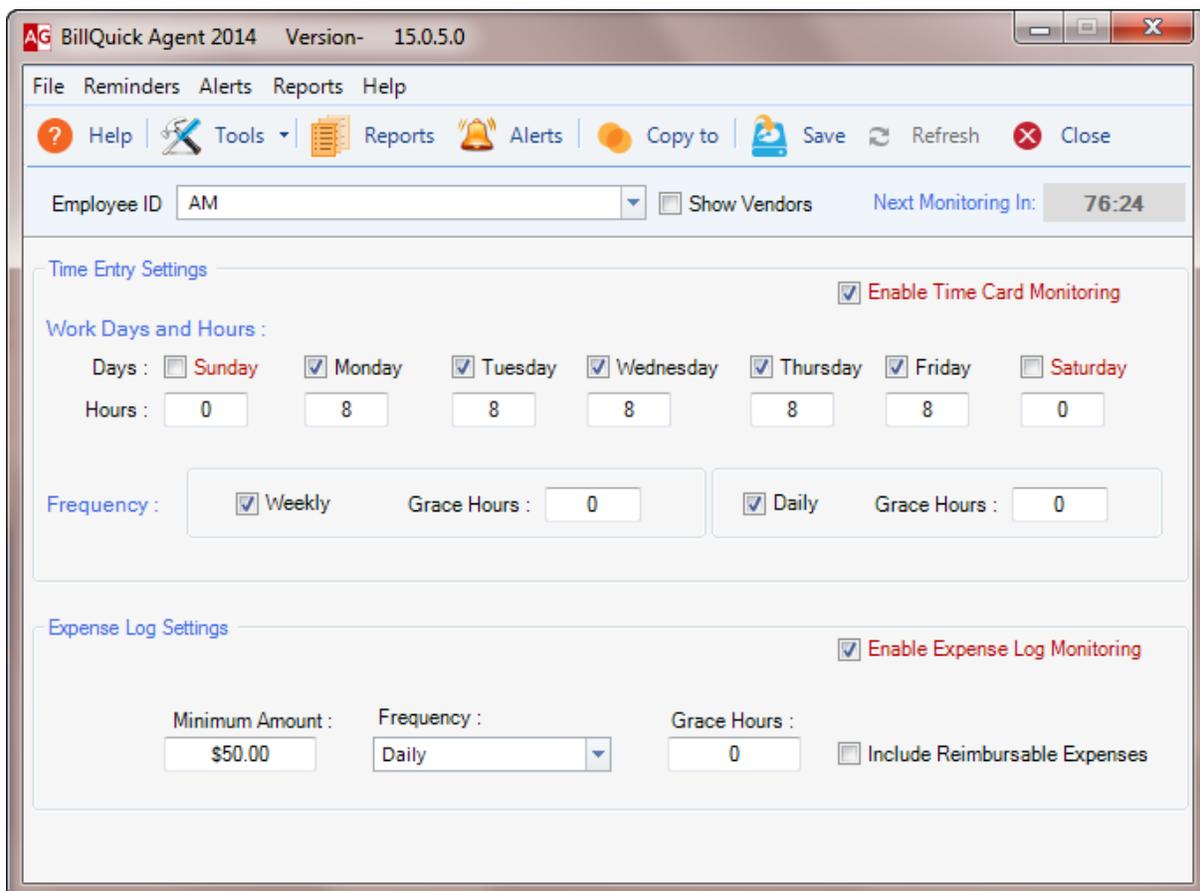
BillQuick Agent is a robust and powerful add-on for BillQuick. Its time card monitoring feature tracks employee attendance in an effective and easy-to-manage way. All you need to do is load your employee’s relevant information and the standard hours worked. Agent will then send automatic reminder emails to employees who have not completed their time cards. BillQuick Agent automatically generates an on-screen report that delineates which employees are short of the required time that they should meet and then sends email reminders to those employees.

BillQuick Agent also has an expense monitoring system which tracks the expense sheets of employees. Its expense calculator works in the same manner as its time card calculator.

Time and Expense Monitoring

Time cards or expense sheets of various employees can be monitored in the following way:

1. Select the Time and Expense Settings option from the Reminders menu.



2. Select the Employee ID of the person whose time and expense sheets are to be monitored.
3. Check the 'Enable Time Card Monitoring' option for monitoring the employee's time entry.
4. Next, check Work Days and Hours for which the time monitoring is to be done and enter the standard number of Hours for which an employee has to work per day.
5. In the Frequency section, select the frequency at which you want to monitor time. In addition, enter the number of Grace Hours in case of delay in submitting time entries.
6. Similarly, check the 'Enable Expense Log Monitoring' option for monitoring your employee's expense sheet against the minimum expense amount set here.
7. Enter the minimum expense amount in the Minimum Amount field that an employee should incur for the time interval set by you
8. Select the desired frequency – Daily, Weekly, Biweekly or Monthly.
9. Enter the Grace Hours, if needed.
10. Select 'Include Reimbursable Expense' check box if the Minimum Amount should include the reimbursable expenses as well.



Grace period starts *after the midnight* of the day time sheets or expense sheets are completed and expected to be submitted. For example, 9 hours grace means employees can complete and submit their time and expense sheets till 9 a.m. of the next day.

11. In Global Settings screen, Enter the frequency (number of minutes) at which you want Agent to monitor your Company data file. For example If you want it to check your company database for incomplete time or expense sheets after every hour, enter 60 minutes.
12. When you have finished, click Save.



You can assign the same settings to other employees by clicking the Copy To button from the toolbar.

Incomplete Time and Expense Reminders

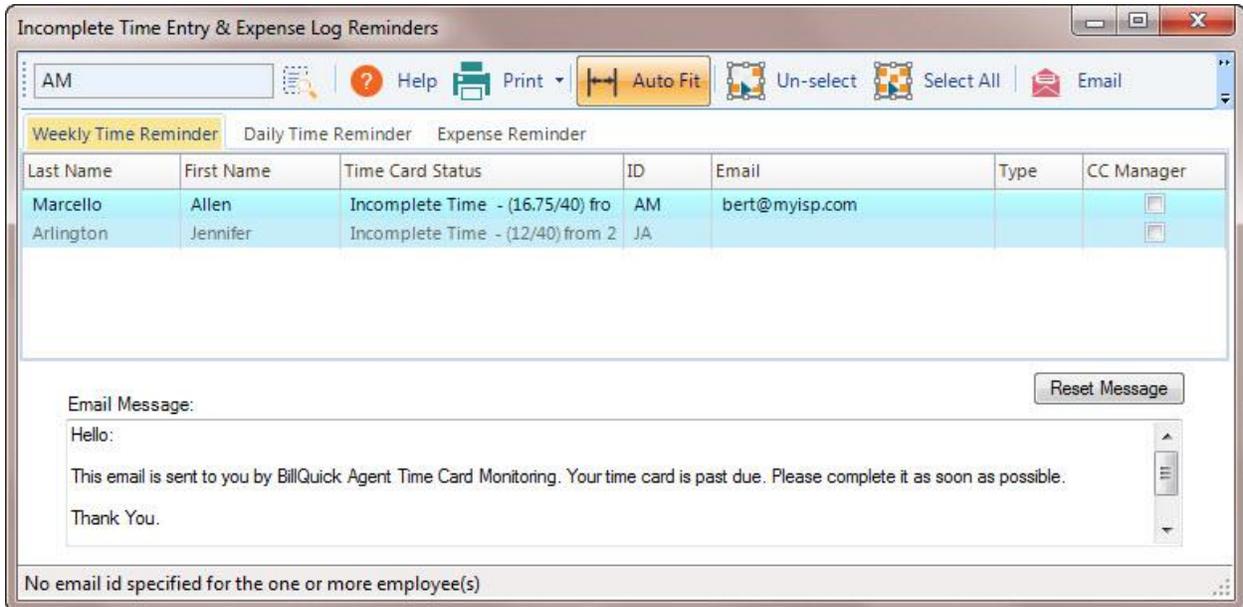
BillQuick Agent monitors the time or expense sheets of active employees and sends notification to those with incomplete time or expense sheets.

1. Select Time and Expense Settings option from the Reminders menu.
2. Specify settings for time or expense entry monitoring (*as explained above*).
3. From the Global Settings screen, check the 'Send past due notifications via email' option.



Email addresses are specified in the BillQuick Employee screen. If none exists there, then you will be prompted to enter the email addresses of the employees.

4. When you have finished, click Save.
5. You can manually force a query or notification by clicking Tools and selecting Notify on the toolbar. Incomplete Time Entry and Expense Log Reminders screen displays.



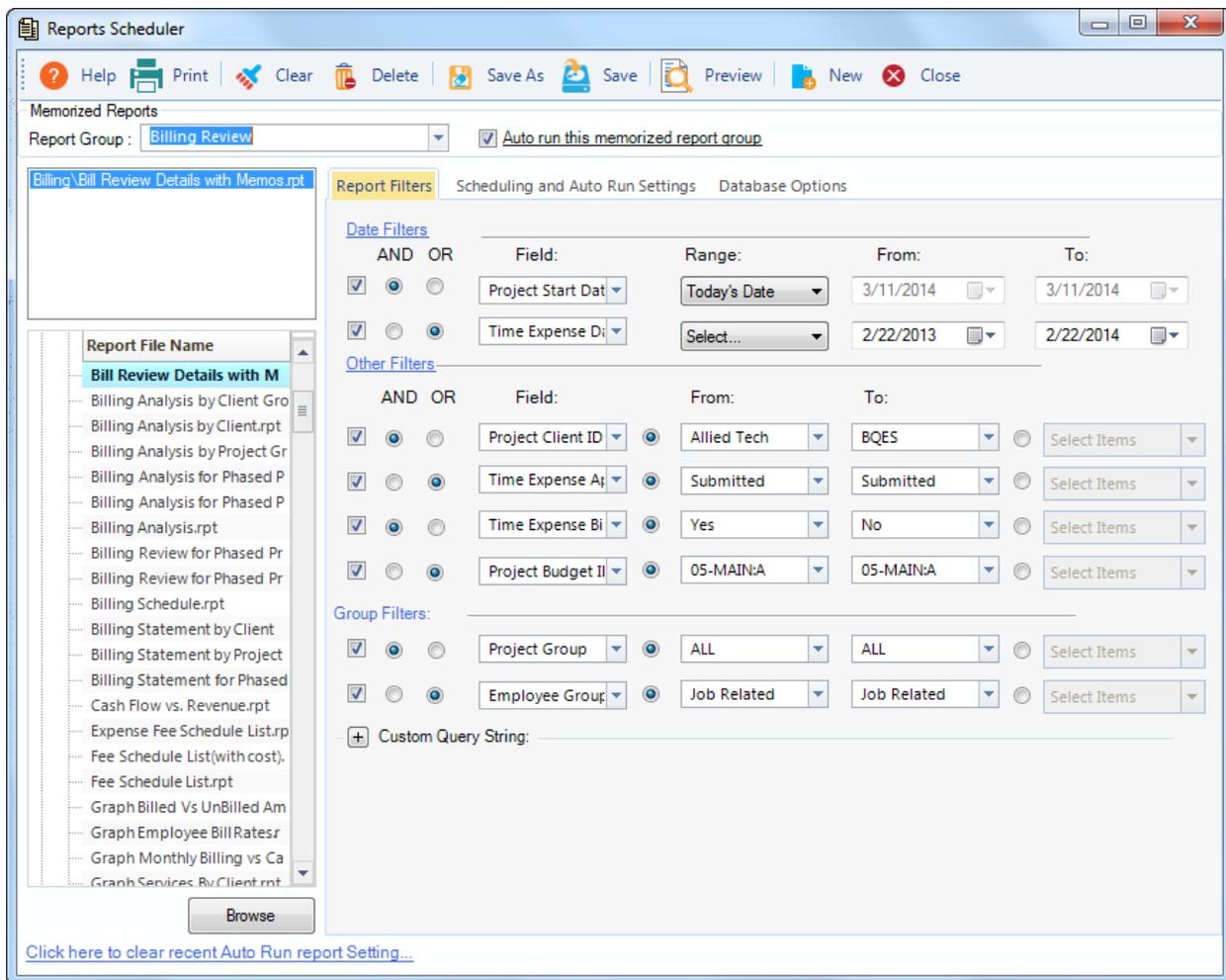
6. BillQuick Agent will automatically generate an on screen report that delineates which employees are short of the required time. With the click of your mouse, each negligent employee is sent an Email reminder.

 BillQuick Agent allows you to send a copy of the time entry notification to the employee manager via email. This helps in proper time and expense entry monitoring.

Reports Scheduling

BillQuick Agent comes with a complete library of standard BillQuick reports. You can assign commonly used filters to the reports (standard or custom) and produce it on demand or schedule it for automatic generation and delivery. BillQuick Agent also allows you to stop or suspend the scheduling of any report.

1. Open the Reports Scheduler screen from the menu bar, toolbar or navigator.
2. You can create a new report, select an existing report from the list of reports displayed on the left, browse for a template, or load a Report Group from the drop-down list.
3. On the Report Filters tab, apply the desired filters.



4. Move to the Scheduling and Auto Run Settings tab.
5. Check 'Auto run this memorized report group' option at the top.
6. Next, select the date to process the report on and specify how often to repeat it— Frequency (Daily, Weekly, and so on).
7. Specify the report delivery settings-Preview, Print, or Email.

8. On the Monitor Time Entry screen, you can specify the time before which you do not want to run the scheduled reports. You can also check the option to 'Append time stamp to the scheduled report name'.
9. You can save all these settings under a new name by clicking Save As. Whenever a new report is created, the name is added to the existing list.



Mark the Inactive option to stop the automatic generation of your scheduled report.

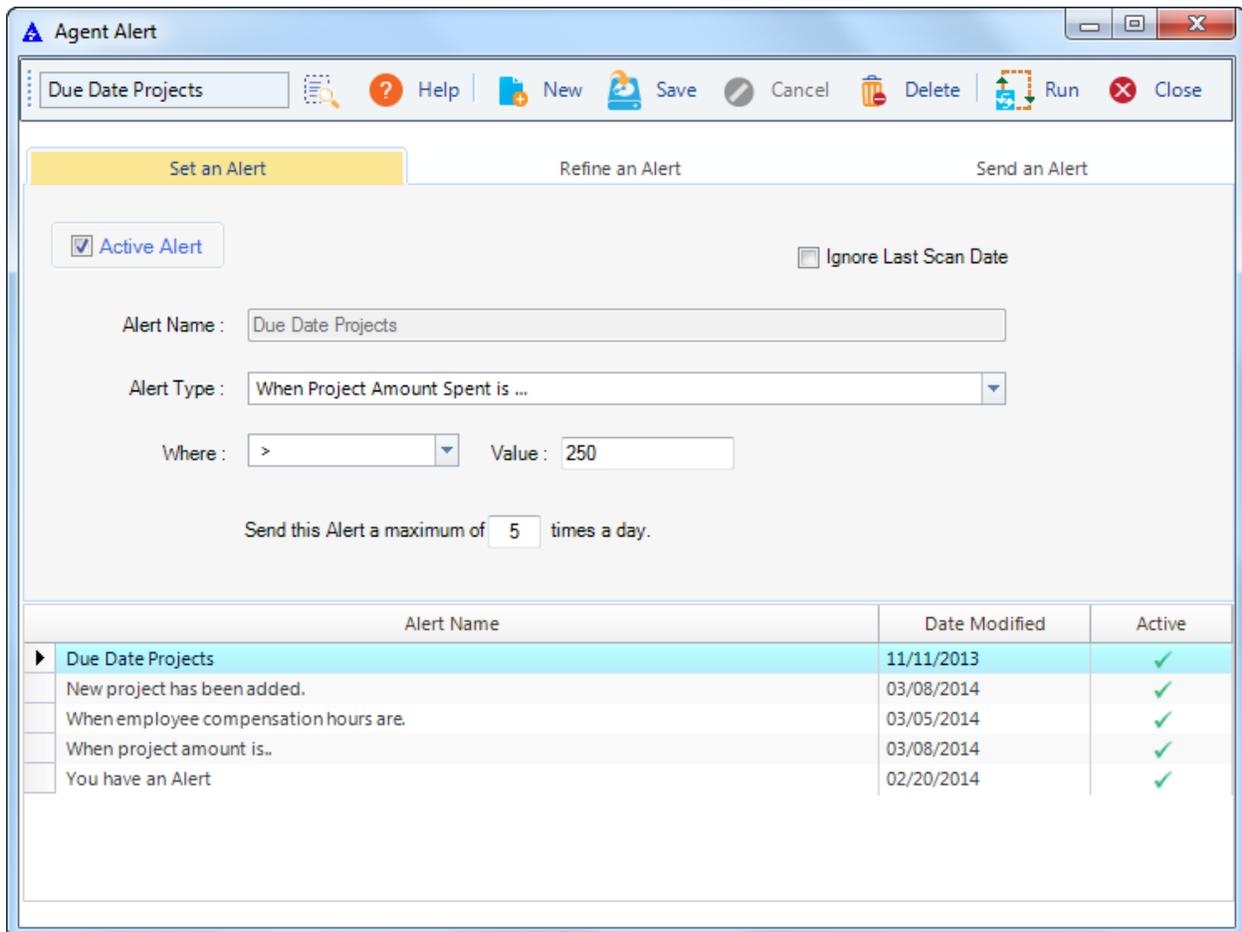
Custom Alerts

Alert is the intelligent monitoring tool in BillQuick Agent that automatically monitors company database and triggers alerts based on some predefined conditions. When triggered, it instantly delivers messages and reminders on-screen, via email or on a cell phone. You can choose from more than 40 pre-defined alerts! Some alerts have predefined thresholds, such as 75% service amount spent on a contract. In others, you can define them to trigger an alert. For example, when budget spent on the project has exceeded a threshold or when a project has excessive work-in-progress.

 BillQuick Agent also enables you to set the time duration for on-screen alerts.

To set alerts:

1. Open your BillQuick Agent program and click Alerts on the main toolbar.
2. From the Agent Alert screen, select the 'Set an Alert' tab.

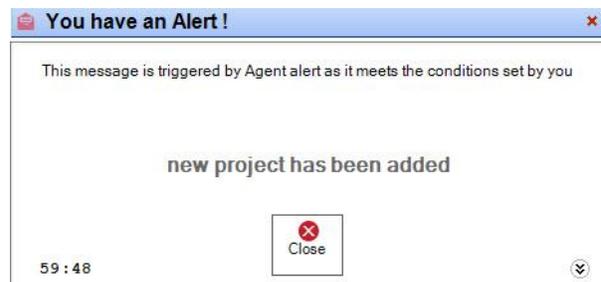


3. Click New. Select the desired Alert Type, say 'When Project Status is "On Hold" ...'
4. Enter the maximum number of times the message should be sent in a day. Click Save.
5. Now move to the 'Send an Alert' tab to determine how to deliver the message and to whom.
6. You can define the text for the body of the email sent for messages.
7. Click Save and then Close. You will receive messages according to your settings!
8. On the Global Settings screen, you can specify the time before which you do not want to run the scheduled alerts. You can also specify the time after which the message box should close automatically.



We recommend sending messages by email because this gives you a record of the alert and the email can be turned into a Task in Outlook.

9. On the appropriate day, you will receive the due date message. Click on the arrow button to open the lower portion of the window.



*Congratulations! You have now successfully installed BillQuick Agent and understood its basic functionality. To learn more about this program, check the **BillQuick Agent Help** or visit [Product Overview](#).*

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



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