



QCDocs Desktop Setup Guide

Updated October 2, 2008

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Introduction

Welcome to QCDocs!

The QCDocs Desktop Setup Guide provides step-by-step instructions on how to download and install QCDocs Desktop.

QCDocs Desktop provides the necessary tools to quickly acquire associate and file any important company documents, such as invoices, receipts or contracts. QCDocs Desktop also manages the synchronization between your accounting systems and QCDocs corporate portal.

This setup guide will walk you through the steps on installing the QCDocs Desktop application.

System Requirements

Please ensure that your PC meets the following system requirements before installing QCDocs Desktop:

- Windows 2000, Windows XP or Windows Vista
- 512 megabytes of RAM
- 50 megabytes of free hard drive space
- High speed access to the Internet

While not required, the following is highly recommended for an effective QCDocs work environment:

- Dual Monitors (for quickly managing data)
- A flatbed scanner with document feeder or a dedicated document scanner (*we recommend a Fujitsu ScanSnap S500 as it's ideal for this type of use and very cost-effective*)

Installing QCDocs Desktop

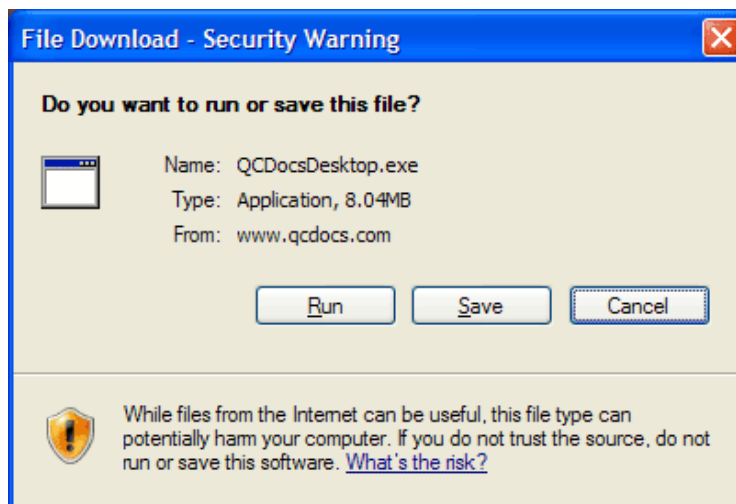
1. Download QCDocs Desktop

The latest version of QCDocs Desktop can be downloaded from the QCDocs Systems website at www.qcdocs.com/download.

Using Internet Explorer 7

To download QCDocs Desktop using Internet Explorer, click the Main Installation file link.

Internet Explorer will prepare to download the file and provide the following prompt.

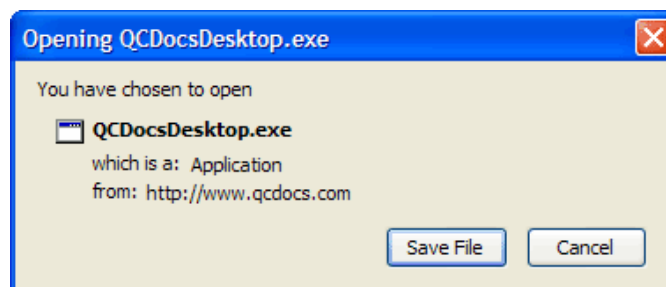


Click **Save** and save the file to your *Desktop*.

Using Firefox

To download QCDocs Desktop using Internet Explorer, click the Main Installation file link.

Firefox will prepare to download the file and provide the following prompt.



Click **Save**. Firefox will automatically save the file to your default download location.

2. Run QCDocsDesktop.exe

Double-click QCDocsDesktop.exe to start the installation process.

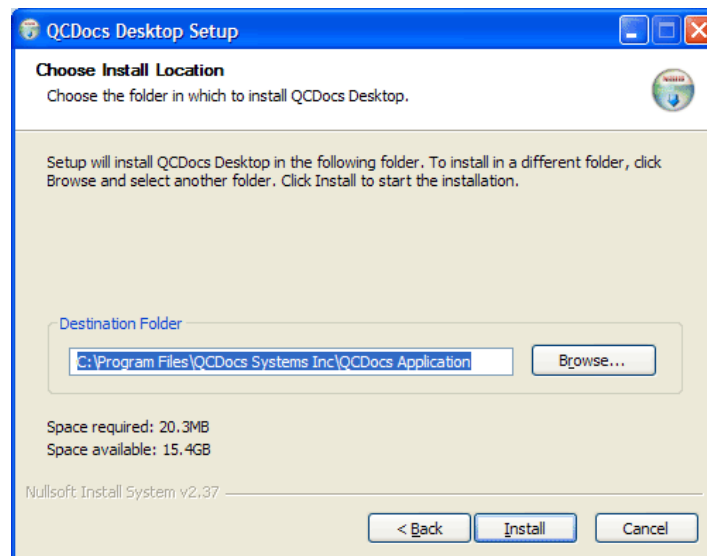
Depending on the version of Windows you are running, you may receive the security warning below when starting the setup program. Click Run to continue.



Windows Vista users may receive more extensive messages as part of Vista's new security processes.

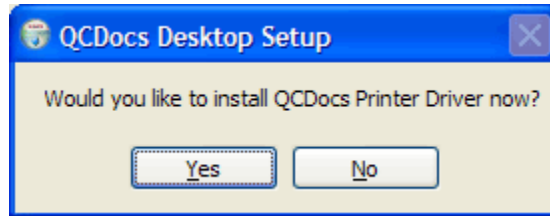
3. Select a Destination Location

After accepting the License Agreement you will be prompted to select an Install location. By default, QCDocs Desktop will install itself to C:\Program Files\QCDocs Systems Inc. This can be changed by clicking **Browse** and selecting a different folder. Click **Install** to continue.



4. Installing the Printer Driver

You will be prompted to install the QCDocs Printer Driver. The driver allows you to print any type of document into QCDocs as an image file. Click **Yes** if you would like to install this functionality.



Select a Language. Click **Next** to continue.

You will be prompted to select an Install location. By default the driver will install itself to C:\Program Files\QCDocs printer. This can be changed by clicking **Browse** and selecting a different folder. Click **Install** to continue.

Depending on the version of Windows you are running, you may receive a compatibility warning. Click **Continue Anyway**.

The Printer Settings window will appear. Select **OK** to continue.

5. Complete the Installation

Click **Finish** to complete the setup process.

6. Update with the latest QCD.exe file

Automatic version updates is scheduled for release in Spring 2009. In the meantime, you can obtain the latest version of your software from <http://www.qcdocs.com/download/>

Download the QCD Update (qcd.exe). Save this file to your destination location set in step 3. E.g. C:\Program Files\QCDocs Systems Inc\QCDocs Application. Select yes to overwrite the older version in the current installation file.

Installing the QuickBooks API (**Bookkeeper ONLY**)

QCDocs requires the QuickBooks API to be installed to communicate and synchronize with your accounting data.

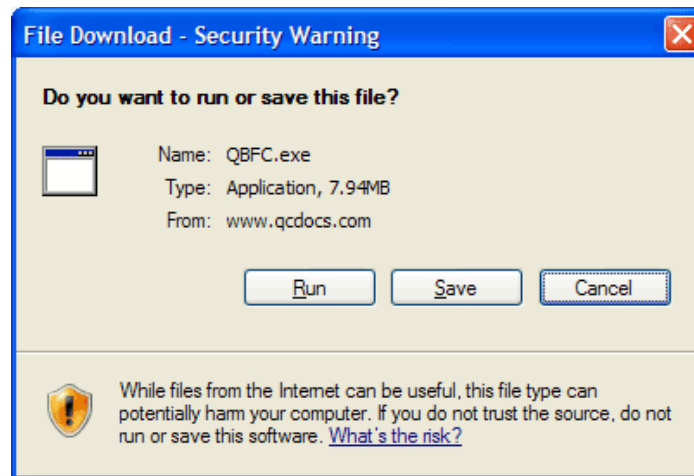
1. Download the QuickBooks API

The latest version of the Quickbooks API can be downloaded from the QCDocs download page: <http://www.qcdocs.com/download/>.

Using Internet Explorer 7

To download the Quickbooks API using Internet Explorer, click the QBFC link.

Internet Explorer will automatically prepare to download the file and provide the following prompt.

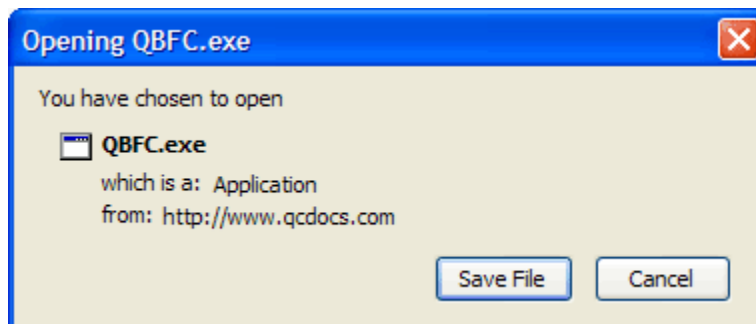


Click **Save** and save the file to your *Desktop*.

Using Firefox

To download the Quickbooks API using Firefox, click the QBFC link.

Firefox will automatically prepare to download the file and provide the following prompt.



Click **Save File**. Firefox will automatically save the file to your default download location.

2. Install the QuickBooks API

Double-click QBFC.exe to start the setup program. The Setup program will automatically install and configure the API for you.

Starting QCDocs for the First Time

To start QCDocs, double-click the QCDocs icon on your desktop.

Or click the QCDocs shortcut in your Start Menu, normally located in Start -> All Programs -> QCDocs Systems -> QCDocs.

When starting the application, QCDocs Desktop immediately asks to verify your username and password. Please enter the username, password and company name provided to you by QCDocs Systems.



The screenshot shows a Windows-style dialog box titled "Login" with a yellow warning icon and a red close button. The dialog contains the following elements:

- A header box with the text "Please enter your credentials:"
- A "Username:" label followed by a text input field containing "jahzel".
- A "Password:" label followed by a password input field containing "xxxxxxx".
- A "Company:" label followed by a dropdown menu showing "Riva Mining" and a trash icon.
- A checked checkbox labeled "remember my credentials".
- Two buttons at the bottom: "Login" (with a yellow padlock icon) and "Cancel" (with a red X icon).

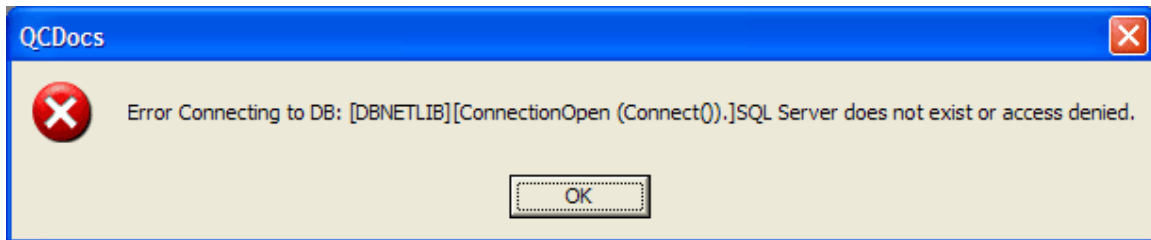
QCDocs Training

To begin learning how to use QCDocs visit the training page: <http://training.qcdocs.com/>
Enter **qcdocs** as the username and **streamline** as the password.

Starting in Scanner Only Mode

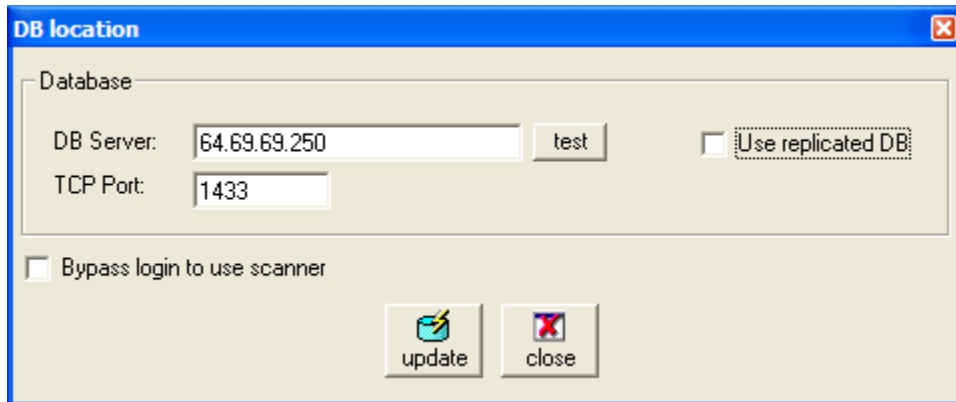
If Internet access is not available, QCDocs Desktop can be started up in Scanner Only mode.

Start QCDocs Desktop as normal. When the application fails to connect to the database, you will receive the following message:



Click **OK**.

The application will then prompt you to change the location of the database server. Check **Bypass login to use the scanner** and click **Update**.

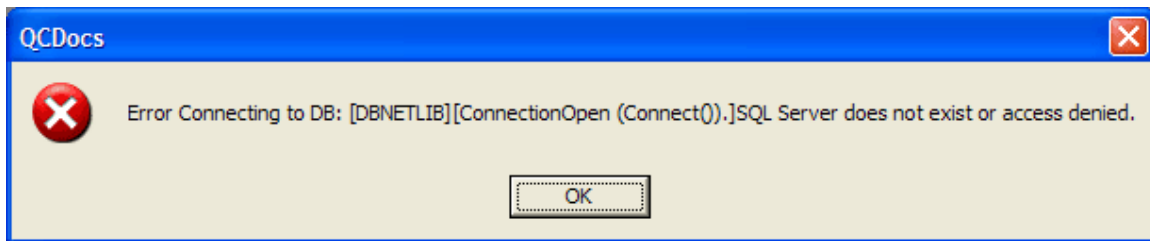


Troubleshooting

Limited or no Internet Access

QCDocs Desktop requires Internet access to function correctly.

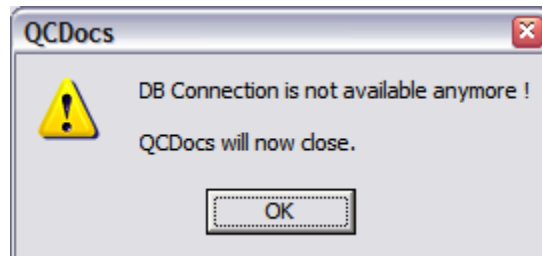
If you start QCDocs with no Internet access, you may receive the following message:



Some firewall configurations may also cause this error message. QCDocs Desktop requires TCP port 1433 open to create outbound connections to the QCDocs database server.

Interrupted Internet Access

If Internet access is interrupted while working in QCDocs Desktop, you may receive the following message.



Simply shut down QCDocs Desktop and restart the application when Internet access has been restored.

Document Viewing (in Acquire) or Importing in QCDocs Desktop

QCDocs Desktop uses ImageGlue's graphics library to work with many documents formats, including .JPG and .TIF (used for printing cheques). If this library becomes corrupted, QCDocs Desktop will fail to import or view image documents.

To correct this, please download and install ImageGlue from: <http://www.qcdocs.com/download/>
Click the Image Glue link to download.

Known Issues

Vista

#725 – Printer Driver fails to install on Vista Operating systems. Please use other methods of importing documents into QCDocs until the issue is resolved for Vista.

#853 - Scaninbox and Printerspool folders not created after QCDocs installation. Folders must be manually created.

If you encounter any problems, please see the section below for technical support.

How to Contact Support

Technical Support for QC Docs is available from 9am to 5pm, Pacific Standard Time.

Support can be reached by e-mail at support@qcdocs.com or toll free at (877) 241-8444.