



T-Quoter Software Installation Guide

This document is intended to assist our customers to install ReSource T-Quoter software on systems they already own, or obtained from a third-party.

You will need to perform many of the tasks described in this guide. This Guide is organized by the role of the machine you are configuring; Server, Client, etc.

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Installation - Overview

SERVER INSTALL TASKS:

The installation of the ReSource T-Quoter system needs to be performed in the following order:

- Install T-Quoter
- Setup, connect, and configure all hardware. This includes connecting, installing, and testing your printers in Windows with successful Windows test pages.
- If you have a network you should connect and configure Windows networking per the guidelines shown in this document. This includes opening firewall ports for SQL connections, as well as sharing the C:\ReSource directory.

CLIENT INSTALL TASKS:

In the case of adding client machines on a network you will need to also:

- Install T-Quoter
- Share the C:\ReSource\T-Quoter directory on your Server with full access permissions
- Map network drives to the Server share, as described in this document.
- Connect your client machine to the SQL database on the Server, using steps shown in this document.

DATA TRANSFER TASKS:

- If you have data from an older machine, you must transfer the data from old machine to new, using steps shown in this guide

This document takes you through each of these tasks in order. Please be sure to follow these steps in detail. Doing so will assure a smooth installation experience

There are different steps depending on whether

- **You are setting up a new machine, without legacy data – or**
- **A new machine, with your customer, pricing, and revenue data transferred.**

Please review this entire document now, and select the steps that are appropriate for your situation.



Glossary Of Terms

- The term **Server** can mean a stand-alone system or in the case of a multiple machine system, will refer to the main machine in a network. It is the machine where your T-Quoter SQL database file resides.
- The term **Client** means any subsidiary or back-room machines in the shop that read their data across a network from the Server.

File Servers, NAS, Other Data Storage Devices

This software REQUIRES that your T-Quoter data must be located on a machine that also has T-Quoter software installed on it. You must now choose which machine in your shop will have the role of T-Quoter data server. We recommend that this your most powerful workstation i.e. the system with the most robust processor/RAM combination

Configuration

This section is designed to help you prepare your computer systems prior to beginning installation. These steps are applicable to both Server/Stand-Alone machines, as well as Client machines.

USER ACCOUNT CONTROLS: **IMPORTANT:** You **must disable User Account Controls** in Windows 7/8/10

INTERNET ACCESS: Broadband Internet access from each T-Quoter machine is required.

MINIMUM REQUIREMENTS: Make sure your hardware and Windows Operating System (OS) meets the minimum hardware requirements shown at the end of this document.

OPERATING SYSTEM: T-Quoter is supported on the following operating systems only: Windows 7/8/10. Operation on other operating systems, such as Server OS, may bring unsupported results. ReSource Customer Service will be unable to assist you with your issues if your system is determined not to be running a supported environment.

USER LOGINS: The T-Quoter shop management system is currently not designed to support systems with multiple user logins in Windows. T-Quoter must run under a single user login with full administrative rights. Please create one user login for your store. Install and use the software under one administrative user login.

INSTALLATION LOCATION: Installation of the T-Quoter system is only supported on the C:\ drive.

DISPLAY FONTS: T-Quoter will only display properly under Normal fonts



REPORT/ORDER PRINTER: Install the printer per the documentation that comes with the printer using the install CD included with the printer. When installation is finished, make sure the printer is the Windows default printer and that it prints a Windows Test page. You can use a shared printer for all systems, assuming you configure each system in Windows first.

QUICKBOOKS: Currently, Quickbooks 2012 – Quickbooks 2015 are the only supported integration versions for QuickBooks transaction transfer functions. QuickBooks must be installed on the same machine as one of your T-Quoter stations. This station must also have admin rights within T-Quoter.

FIREWALL: Make sure that T-Quoter.exe is given full in and outbound access permissions in your Windows and other firewalls. Make sure that a current anti-Virus software package is installed, updated, and configured on each machine in your store.

A download is available to help automate many common firewall settings used by SQL platforms. You can obtain this file from the web address shown below. Download it to each machine in your shop, run it with T-Quoter closed on all systems when you do so. Please make sure that T-Quoter is installed before running this file.

downloads.resourcesoftware.com/T-Quoter/SetFirewallSettings.EXE



SECTION 1: Install T-Quoter - New User

THIS SECTION APPLIES TO NEW CUSTOMERS. If you are an existing customer, transferring data to a new machine, please review Section 2 of this document. **IMPORTANT: Running these installation steps on a machine with T-Quoter already installed could result in data loss**

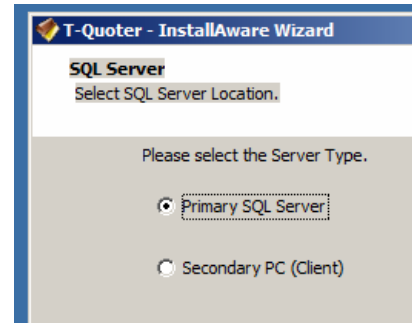
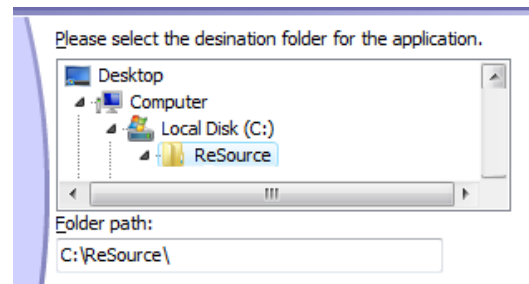
The T-Quoter software is installed via a downloaded installer file. Use the following steps to download the installer file:

Download/Run the T-Quoter Installation File:

1. Open a web browser such as Google Chrome.
2. Visit:

connect.resourcesoftware.com

3. Log into using your account number and password
3. Download the latest update by clicking on the link. **SAVE** the file. Even though labeled as an update, **the update file is also a new installer** if it does not detect an existing install.
4. **SAVE** the file to a location on the new hard drive, such as the Windows desktop
5. When the download completes, run the downloaded installer file.
6. Follow the on-screen prompts to complete the installation.
7. **IMPORTANT:** During the installation, you will be prompted to designate this as a Server machine. Choose PRIMARY, as shown.
8. Continue to follow the on-screen prompts, until Finish
9. Open T-Quoter
10. Select 30-Day Trial
11. Proceed through the initial setup screens to enter your account and other information





SECTION 1: Install T-Quoter – New User – First Time Setup Screens

When you open T-Quoter for the first time, you will be presented with a series of first time setup screens. These screens help speed the configuration of T-Quoter for first-time use. Read and enter each information element carefully.

SECTION 1: Install T-Quoter – New User – Code Activation

T-Quoter conducts product activation and support via a per machine license and support system.

Activate Product With Your License Key

If you are a licensed T-Quoter user, you will need to enter one of your license keys to take the software out of 30-trial mode.

1. Open T-Quoter.
2. Click TOOLS | Activate Product
3. Enter your license number.
4. Click Activate.
5. You should activate successfully.

Configure the T-Quoter as shown in our Help system. You can view the Help Topics from within the T-Quoter software by clicking the HELP menu, or at www.t-quoter.com

Questions: Contact ReSource T-Quoter Customer Service (800)537-3621



SECTION 2: Install T-Quoter – Existing Users – Install T-Quoter

IMPORTANT NOTE: Your existing system must be running version 2.18.412 before proceeding with these steps. If you are running a version older than .412, STOP. Significant data loss can occur. Confirm you existing version by clicking HELP | About within T-Quoter. Contact ReSource Customer Service for more information before proceeding!

Install T-Quoter On Your Replacement Machine

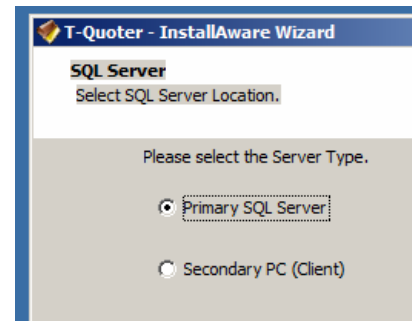
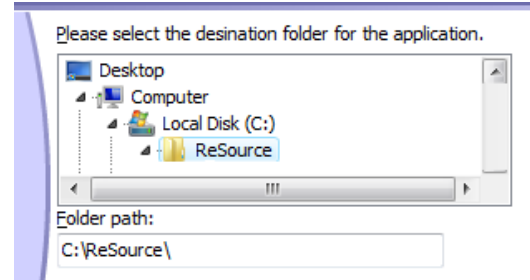
The T-Quoter software is installed via a downloaded installer file. Use the following steps to download the installer file:

Download/Run the T-Quoter Installation File:

1. Open a web browser such as Internet Explorer.
2. Type the following address EXACTLY as it appears

<http://connect.resourcesoftware.com>

3. Login using the instructions on this screen. There are also instructions for resetting your password should you need to do this.
4. Log into using your account number and password
5. Download the latest update by clicking on the link. Even though labeled as an update, **the update file is also a new installer** if it does not detect an existing install.
6. Click the installation file link. **SAVE** the file to a location on the new hard drive, such as the Windows desktop
7. When the download completes, run the downloaded installer file.
8. Follow the on-screen prompts to complete the installation.
9. **IMPORTANT:** During the installation, you will be prompted to designate this as a Server machine. Choose PRIMARY, as shown.
10. Continue to follow the on-screen prompts, until Finish



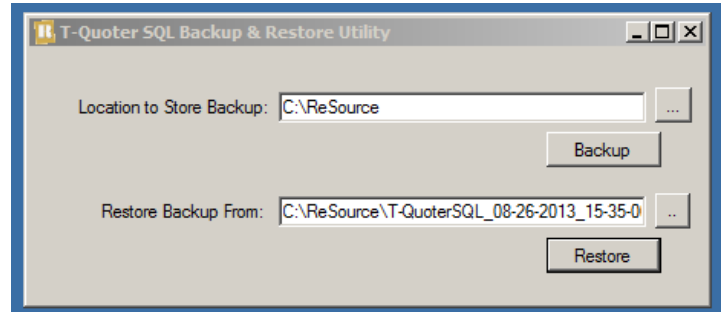
**IMPORTANT: DO NOT OPEN T-QUOTER YET –
USE THE STEPS IN THE NEXT SECTION TO TRANSFER IN YOUR DATA FIRST**



SECTION 2: Install T-Quoter – Existing Users – Backup Data

Make A Backup – Existing Server:

1. Run the file C:\ReSource\T-Quoter\MSSQLBackupRestore.exe, on the machine that contains your T-Quoter SQL Database i.e. your Server machine.
2. Select the location where you want the file backed up by clicking on the ‘...’ button
3. Click **Backup** button. (Technical information: This will detach the DB, stop the SQL instance, copy the mdf & ldf over to the backup location, restart SQL instance and attach the DB again).
4. Two files will be created by this process. You will need to manually copy these two files to your backup drives. Typically, this will be a USB external drive or stick
5. Take this portable device and connect it to your new system.



After it's finished, user will see mdf and ldf file with datetime stamp in their backup folder.(shown below)

T-QuoterSQL_05-16-2013_14-14-16.mdf	14,080 KB	SQL Server Databa...	3/26/2013 8:24 AM
T-QuoterSQL_05-16-2013_14-14-16.ldf	560 KB	SQL Server Databa...	3/26/2013 8:24 AM

SECTION 2: Install T-Quoter – Existing Users – Transfer T-Quoter Data To A New Machine

1. Run the file C:\ReSource\T-Quoter\MSSQLBackupRestore.exe on your new machine. This is the same utility you ran on the old machine in order to create the backup.
2. Connect the USB drive with your data backup.
3. Select the location of your data files by clicking on the ‘...’ button. Select your USB drive.
4. Click **Restore**
5. The utility will detach the DB, stop SQL instance, copy the mdf & ldf over from restore location to the SQL server DATA folder (it overwrites existing mdf/ldf **and shows a warning** that it's about to do so, user has an option to say NO), restart SQL instance and attach the newly copied DB.

SECTION 2: Install T-Quoter – Connect Clients To New Server

You need to connect your existing client machines to the new Server you just installed. Review the steps **Install T-Quoter – Existing Client Machines – Connect To A New Server** shown later in this document



SECTION 2: Install T-Quoter – Existing Users – Code Activation

T-Quoter conducts product activation and support via a per machine license and support system.

Activate Product With Your License Key

If you are a licensed T-Quoter user, you will need to enter one of your license keys to take the software out of 30-trial mode.

1. Open T-Quoter.
2. Click TOOLS | Activate Product
3. Enter your license number.
4. Click Activate.
5. You should activate successfully.

Configure the T-Quoter as shown in our Help system. You can view the Help Topics from within the T-Quoter software by clicking the HELP menu, or at www.t-quoter.com

SECTION 2: Install T-Quoter – Existing Users – Code Deactivation

Deactivation/Reactivation

If you are installing T-Quoter on a new machine, and plan to transfer your customer and order history, you must first deactivate the code in use on the existing machine. You will then use this code on your new machine.

Deactivate The Current Installation:

1. Open T-Quoter
2. Click HELP | About. Note the License Number in use on this machine.
3. Click OK.
4. Click TOOLS | Deactivate Product
5. Answer Yes.

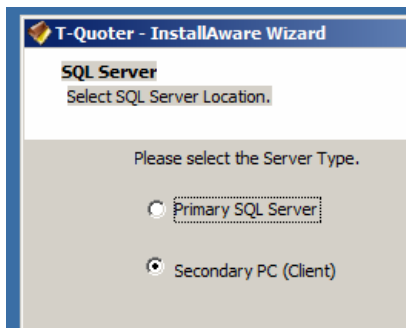
This code can now be used on your replacement machine. You will need to obtain an additional product license to continue using the machine on which the code was just deactivated.



SECTION 3: Install T-Quoter – New Client Machines – Connect To SQL Server

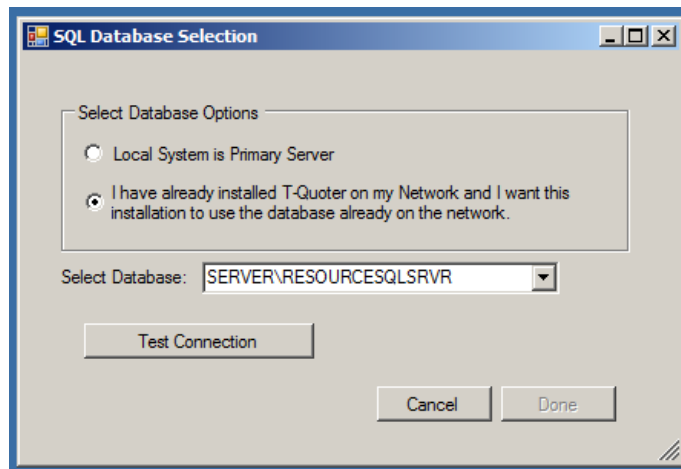
Use the same installer file and installation steps as discussed earlier if installing T-Quoter on secondary (Client) machines.

During the installation, you will be prompted to designate this system as a Primary or Secondary system. You will chose Secondary as is shown:



The next screen you will see the opportunity to form a connection to the SQL database on your Server

1. Choose *I Have Already Installed T-Quoter On My Network...*
2. If a running SQL database is found, you should see it listed. You can also browse for the SQL database by using the database menu pull down. Note: If you do not see anything listed, this system is isolated from your T-Quoter Server by a firewall or other element. You will need to identify the source of the problem, and resolve it, before continuing.
3. Click Test Connection. If successful, you will see a message indicating this. If not, please identify why this system cannot form a connection to the parent SQL Server, and then repeat this step.
4. When successful, T-Quoter will open. You can do final configuration of the report printer, then begin using the system

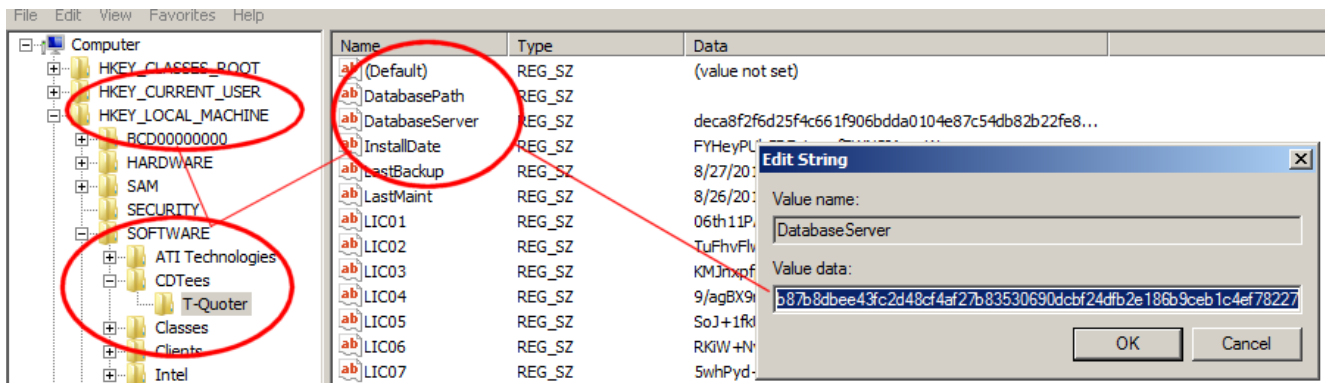




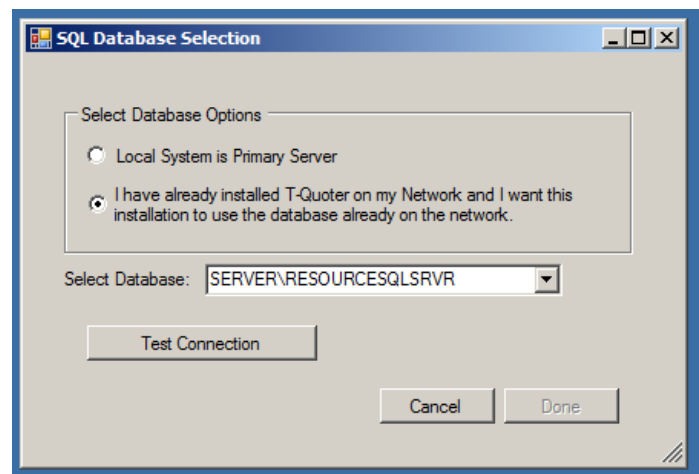
SECTION 3: Install T-Quoter – Existing Client Machines – Connect To A New Server

If you have existing client machines, you will need to connect them to the data on your new server.

1. On each client, open Regedit. You can do this by clicking START | Run or START | Search, then running regedit.exe
2. Double click on HKEY\Local Machine
3. Double click on SOFTWARE
4. Double click CD TEES
5. Find then double click the registry key DatabaseServer, as is shown below...



6. Clear the Value Data box, so that nothing is shown (i.e. is blank). Click OK, then close Regedit by clicking FILE | Exit
7. Open T-Quoter on this Client system
8. You will be prompted to select the database on your new Server machine.
9. If a running SQL database is found, you should see it listed. You can also browse for the SQL database by using the database menu pull down. Note: If you do not see anything listed, this system is isolated from your T-Quoter Server by a firewall or other element. You will need to identify the source of the problem, and resolve it, before continuing.
10. Click Test Connection. If successful, you will see a message indicating this. If not, please identify why this system cannot form a connection to the parent SQL Server, and then repeat this step.
11. When successful, T-Quoter will open. You can do final configuration of the report printer, then begin using the system
12. Repeat these steps for all other client machines in your shop.





SECTION 4: Install T-Quoter – Networking Setup

This section outlines the basic steps needed to configure a network to support multiple machines running T-Quoter in your shop.

This section is intended as a convenience for our more advanced users to give them a quick guide to get their networks running. The tasks outlined in this section can be technically challenging for many users. ReSource Customer Service is happy to assist you with your T-Quoter installation questions but does not conduct network support. This document also assumes that you have hooked up all network cables, properly hooked the cables to a network router if applicable, installed the correct network cards and software drivers, etc.

If you do not understand the tasks outlined in this section, or if you follow these steps and your network still does not function properly, please contact a local technician to properly configure your network prior to proceeding.

Once you have successfully completed sharing directories and setting the drive mapping, you are ready to proceed with the Client installation steps. The installation cannot proceed unless the network is fully configured.

TERMINOLOGY:

- *Server* is the main machine in your store. It contains the T-Quoter program, as well as your customer, inventory, configuration, and other data files.
- A *Client* is a subsidiary computer.

These each have the T-Quoter software installed, but are mapped back to the data files on the Server. Each machine shares data files in common so changes made on one computer are reflected on all computers.

WORKGROUPS: All machines should be on the same Workgroup. Our standard workgroup name is RSI. Domains are an untested manner of network organization for T-Quoter integration.

USERS: The T-Quoter system is currently not designed to support network systems with multiple user logins. Please create one user login for your store and install the software under that login on each machine. This login must have Administrative privileges.

NETWORK SHARES: Establishing a share of the C:\ReSource\T-Quoter directory, with full access permissions, is a requirement for T-Quoter to operate properly. A properly configured network should allow Full Read-Write Access (*Allow Network Users To Change My Files...*) permissions to the Server's shared directories. SERVERC as share description is suggested.

STATIC IP ADDRESSES: It is not required that you statically assign each machine's IP address, unless your network mapping is conducted via an IP address for non-T-Quoter related reasons, such as when sharing a copier.

NETWORK SHARE MAPPING: Map the C:\ReSource\T-Quoter drive on your Server machine as **M**.



(XP machine shown)

- Once connected, you should see your workgroup name under Microsoft Windows Network from your client machine.
- If not, double click on Microsoft Windows Network and you should then see RSI.
- Double click RSI and you should see SERVER. Double click on SERVER and below that you should see SERVERC.
- If you are unfamiliar with steps needed to share and map a network drive letter, please consult your local computer support technician.

If you are unable to complete the steps above, reboot both the Server and then the Client. Try to map drives again. If you still cannot see the Server machine, please contact a local technician to resolve the issue and have them complete the drive mapping steps before proceeding with client machine setup tasks.

SECTION 4: Install T-Quoter – Networking - Open Firewall For SQL Traffic

Make sure that T-Quoter.exe is given full in and outbound access permissions in your Windows and other firewalls. Make sure that a current anti-Virus software package is installed, updated, and configured on each machine in your store.

A download is available to help automate many common firewall settings used by SQL platforms. You can obtain this file from the web address shown below. Download it to each machine in your shop, run it with T-Quoter closed on all systems when you do so. Please make sure that T-Quoter is installed before running this file.

<http://release.resourcesoftware.com/tquoter/firewallsettings.exe>



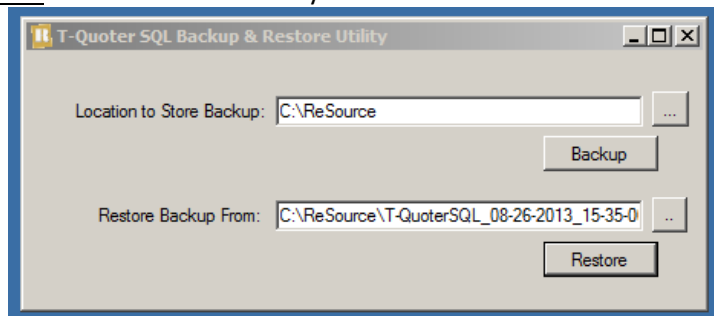
SECTION 5: T-Quoter SQL Backup Utility

The T-Quoter SQL Backup Utility is included with the T-Quoter program. This utility must be run periodically to make a backup of your important Customer and Order history files. **THE PROCESS IS NOT AUTOMATIC. You need to run this process manually!**

Add running these steps to your daily procedures. ReSource T-Quoter Customer Service will be happy to assist you with these steps, but will rely on you to provide a current backup in cases of hardware or data failures.

Make A Backup:

6. Close T-Quoter on ALL machines
7. Run the file C:\ReSource\T-Quoter\MSSQLBackupRestore.exe, on the machine that contains your T-Quoter SQL Database i.e. your Server machine. Note: on Windows 8 you must Run as Administrator.
8. Select the location where you want the file backed up
9. Click **Backup** button. (Technical information: This will detach the DB, stop the SQL instance, copy the mdf & ldf over to the backup location, restart SQL instance and attach the DB again).
10. Two files will be created by this process. You will need to manually copy these two files to your backup drives. You can also mark these files to be included in an online backup program.
11. **A backup made to the same hard drive as the current system does you little good in case of a hard drive failure or other hardware issue. Be sure that you have a plan to copy these files off this system to other locations in your shop, and out of the shop.**



After it's finished, user will see mdf and ldf file in their backup folder. (Shown below)

T-QuoterSQL.mdf	02/23/2016 3:07 PM	SQL Server Databa...	158,464 KB
T-QuoterSQL.ldf	02/23/2016 3:07 PM	SQL Server Databa...	138,496 KB

Restore/Transfer A Backup:

6. This same utility will allow you restore a backup if needed, or if installing a new machine.
7. Select the mdf to restore from using the browse button.
8. Click **Restore**
9. The utility will detach the DB, stop SQL instance, copy the mdf & ldf over from restore location to the SQL server DATA folder (it overwrites existing mdf/ldf **and shows a warning** that it's about to do so, user has an option to say NO), restart SQL instance and attach the newly copied DB.

PLEASE REMEMBER: Add the files created by this process to your external or cloud-based backup.



MIMIMUM SYSTEM REQUIREMENTS: Windows 7/8/10 (32 or 64-bit), Ethernet 10/100 or Wireless N, 2 GB RAM, 100 MB free HD space