



## **Administrator Instruction Manual**

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## Introduction

QuiKer is a plug-in for Microsoft Outlook that facilitates the creation of AMS360 Activities based on email communications items.

QuiKer allows Users to save Inbox Activities directly to AMS360 from within Outlook, and automatically pops a streamlined Activity screen upon sending an email.

The time it takes to create AMS360 Activities is greatly reduced by the following QuiKer features:

1. Emails and attachments are automatically included in the Outlook Activity creation screen; there is no longer a need to drag-and-drop items into AMS360.
2. The login credentials persist after the initial installation, so Users do not need to log in every time, **OR** be signed in to AMS360.
3. Customer searches are faster and more thorough than searches performed inside of the AMS360 platform.

QuiKer mirrors the rich behaviors of AMS360 with the following upgrades:

1. For agencies that have not elected for attachments to be automatically extracted within the AMS360 settings, QuiKer will automatically extract these emails.
2. The Search field displays Active and Inactive Customers, Prospects, and Suspects, making it easier to locate any Customer type.
3. When adding a CC to a Suspense, QuiKer creates a suspense for Primary User and Secondary User. This enhancement eliminates the likelihood of the Secondary User dismissing the Primary User's Suspense.
4. QuiKer will pop a Dialog Box to Create an Activity to give the User an option to create an Activity for every sent email.

## System Requirements

QuiKer is optimized for Microsoft Outlook version 2010 and higher; however, QuiKer has been effective on every version of Microsoft Outlook, except for 2007. If you experience any issues with a particular version, please email us at [helpdesk@simplyquiker.com](mailto:helpdesk@simplyquiker.com) so we can fix it!

### Outlook Compatibility

- Outlook 2010, Outlook 2013, Outlook 2016, Outlook 2019, Office 365

### Windows Compatibility

- Windows 7 with Service Pack 1 or above
- Microsoft .NET Framework 4.5 or above

\*For some Users running Windows 7 with Outlook 2010, it may be necessary to install "[Visual Studio 2010 Tools for Office Runtime](#)"

### Recommended Browser

- Google Chrome is the recommended browser to download the QuiKer.msi Setup file.



## Knowledge Base

Visit the QuiKer Knowledge Base here: <https://simplyquiker.com/knowledgebase> for short video tutorials that guide you through the Installation and Setup process.

## QuiKer License Keys

A License Key is needed to activate QuiKer. When a User creates their first Activity, a dialog box will prompt the User to enter a License Key to activate QuiKer. The User will need to enter either the 14-Day Free Trial License Key or their Agency License Key, which is assigned upon purchasing QuiKer. Note: All Users in an Agency will use the same License Key to activate QuiKer. License Keys are issued based on User Count. For example: ABC Agency's license key is 1234567 and is valid for 8 Users. All 8 Users will enter 1234567 to activate QuiKer.

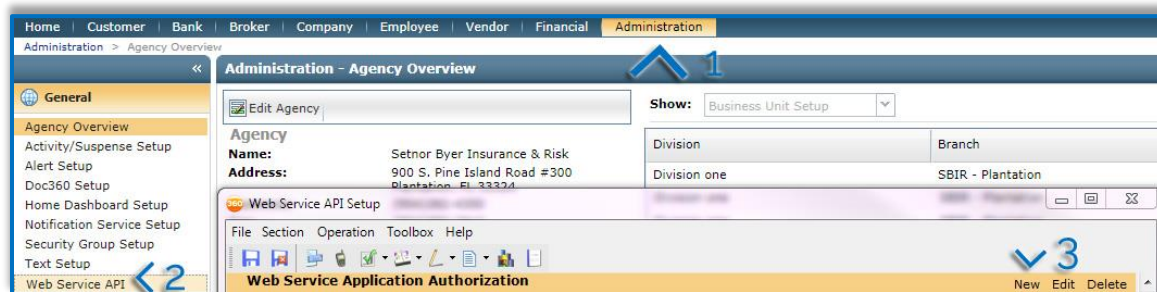
If a User switches computers, the Administrator or User must notify QuiKer Support at [helpdesk@simplyquiker.com](mailto:helpdesk@simplyquiker.com). Because QuiKer is installed locally on a User's computer, the License Key assigned to the old computer must be released, allowing the User to install and activate QuiKer on their new computer.

## Local Drive Installation Instructions

(QuiKer can also be installed via Mass Deployment through Microsoft's Group Policy feature).

### Step 1- Administrator Setup

Prior to the installation, make sure you have a proper Application Programming Interface (API) account for AMS360. The **AMS 360 Administrator** at your organization must create this account on the AMS360 platform, and assign the required permissions. The option to create the API account can be found under the Administrator Tab. Click on Web Service API in the sidebar menu. \*\*



**\*\*If you do not have the Web Service API option, follow these steps to enable it:**

1. Click on the Employee tab
2. Select the employee name from the list
3. Click on Employee Overview on the left under Views
4. Click Edit Employee
5. Click Security
6. Click Security Group Assignment
7. Put a check next to the Owner group
8. Click Save & Close
9. Now have that Employee log out of AMS and then log back in



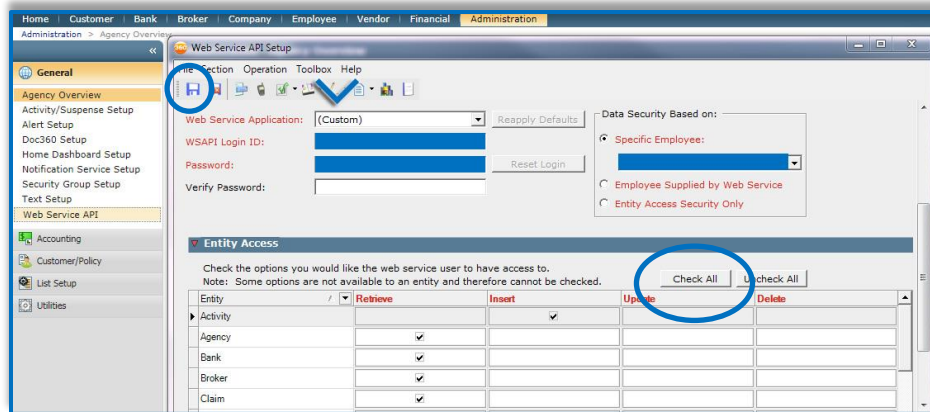
10. Then have the Employee click on the Administration tab and now the Web Service API should be listed on the left under General

Once in the Web Service API click on the “New” button on the right side of the screen. Then, on the User creation screen, invent a unique WSAPI Login ID and a password for each User, and **write it down** for the next step. Select Custom for the Web Service Application from the drop-down menu. **\*No special characters should be used in the WSAPI Login ID or password, only letters and numbers. Credentials should be unique to each User and be of moderate difficulty.**

The QuiKer plug-in contains a built-in Customer search, and the results are determined by the permissions set in the “Data Security Based On” options. From the drop-down menu, please select “**Specific Employee**” and then select the account that corresponds to the User who will be submitting the Activities. **Note exactly how the Employee’s name appears here (Sarah Smith, sarah smith, Sarah Smith, CISR), the Employee First Name and Employee Last Name must be an exact match—including capitalization and titles-- when setting up QuiKer.**

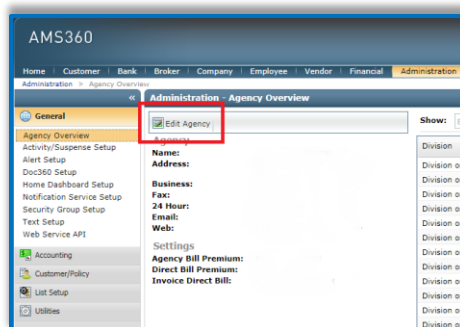
Click the “**Check All**” button and give access to all available check boxes. This must be performed for each User or QuiKer will not be able to connect properly.

**\*Note:** Selecting “Check All” in the WSAPI section of AMS360 does not grant permission for a User to access areas of your AMS360 database where they currently do not have permissions.

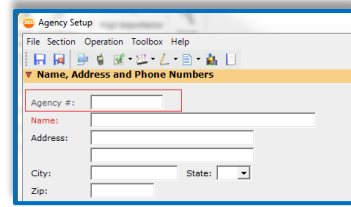


Don't forget to click on the blue floppy disk icon on the top-left side of the screen in order to save a new account.

To complete the Installation process, Users will need your **Agency Number**. To find your Agency Number navigate to the Administration Tab. In Agency Overview, select Edit Agency as seen here:



Your Agency Number is displayed at the top of the page as seen here:



Send all Quiker Users:

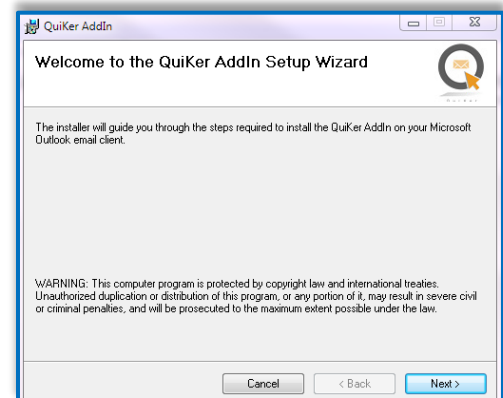
- The Agency Number
- Their API Username
- Their API Password
- How their name appears exactly as it appears in AMS360

## Step 2- User Setup

Close Microsoft Outlook.

Visit <https://simplyquiker.com/trial> to download the QuiKer Program. Now run the QuiKer plug-in installer program and follow the on-screen instructions. The program must be executed with the same Windows account that will be using the plug-in.

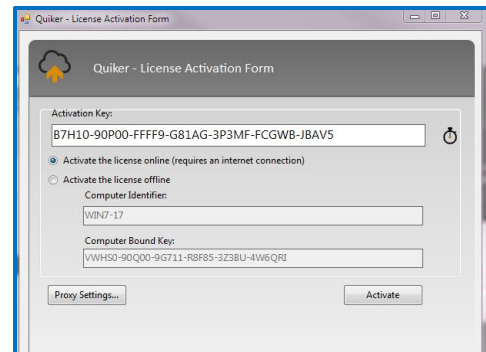
If the Windows Operating System asks for permissions during the installation process, please ask your System Administrator to enter his/her credentials in order to proceed to the next step.



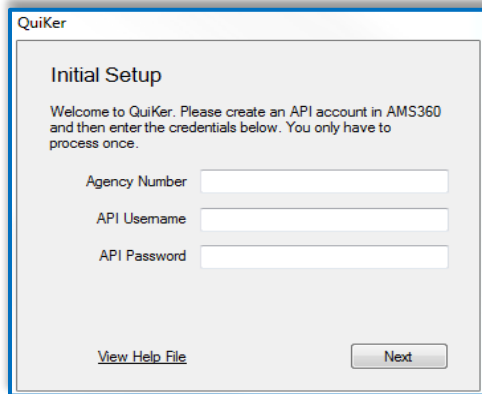
## Step 3- User Setup

Open Outlook and navigate to the "Activate QuiKer" button in the Ribbon.

- Enter in the Trial Key
- Click Activate & close the dialog box



## Step 4- User Setup



QuiKer

### Initial Setup

Welcome to QuiKer. Please create an API account in AMS360 and then enter the credentials below. You only have to process once.

Agency Number

API Username

API Password

[View Help File](#)

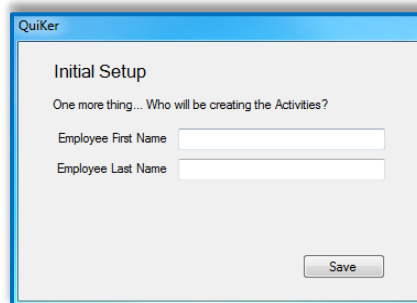
Have the User click on a QuiKer Button (i.e.- “Create an Email Activity”). A window asking for the Agency Number and API credentials created in Step 1 will appear.

Enter the Agency Number and the Username and Password created by your AMS 360 Administrator in Step 1 of the installation process. **\*Make sure to add the dash and the number in the Agency Number field. (For example: 1234567-1)**

## Step 5- User Setup

The last step is to enter the name of the Employee who will be creating the AMS360 Activities. This name must match exactly with an Employee’s profile in AMS360. For example, some Employees have designations after their profile in AMS360 (i.e.- Sarah Smith, CIC). These must be included here. To verify how a User appears, check the “Specific Employee” drop-down in their Web Service API profile.

An error message (**Invalid API credentials**) will display after clicking Save if names do not match.



QuiKer

### Initial Setup

One more thing... Who will be creating the Activities?

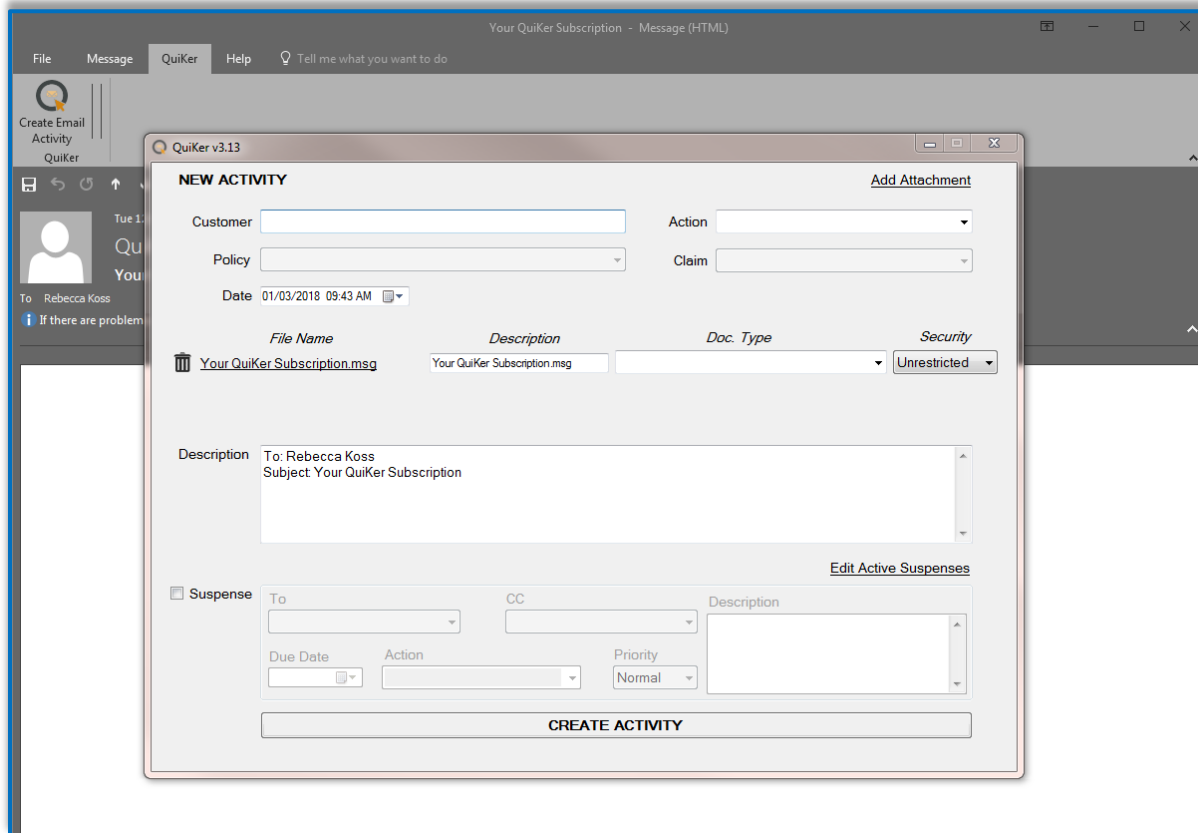
Employee First Name

Employee Last Name



## How to Create Activities

There are three ways to Create AMS360 Activities from within Outlook. First, you can create an Activity with an email from your Microsoft Outlook Inbox. Select **“Create Email Activity”** from the QuiKer tab in the Outlook Ribbon.



The screenshot shows the Outlook interface with the 'QuiKer' tab selected in the ribbon. A 'NEW ACTIVITY' dialog box is open, titled 'QuiKer v3.13'. The dialog box contains the following fields and sections:

- Customer:** A text input field.
- Policy:** A dropdown menu.
- Date:** A date and time picker set to '01/03/2018 09:43 AM'.
- Action:** A dropdown menu.
- Claim:** A dropdown menu.
- Attachments:** A table with columns for File Name, Description, Doc. Type, and Security. One attachment is listed: 'Your QuiKer Subscription.msg' with description 'Your QuiKer Subscription.msg', Doc. Type (empty), and Security 'Unrestricted'.
- Description:** A text area containing 'To: Rebecca Koss' and 'Subject: Your QuiKer Subscription'.
- Suspense:** A section with a checkbox labeled 'Suspense'. It contains fields for To, CC, Due Date, Action, Priority (set to 'Normal'), and a Description text area.
- Buttons:** 'Add Attachment' (top right), 'Edit Active Suspenses' (middle right), and 'CREATE ACTIVITY' (bottom center).

Start by typing the Customer Name and selecting the correct Customer. Select the applicable Policy or Submission. Both the message (.msg File) and attachments are automatically applied to the Activity. Select the appropriate Document Type for the attachment. Users can also set a Document's Security Level using the "Security" drop-down menu.

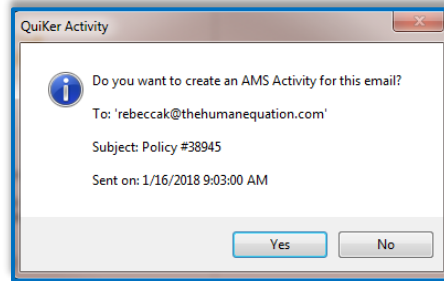




## How to Edit, Complete or Create a Suspense

To edit or complete a Suspense, click on the “Edit Active Suspenses” link on the right-hand side of the dialog box to view all Active Suspenses. To create a Suspense, click on the Suspense checkbox and assign. Make sure to set a Due Date, select an Action, set Priority and enter a Description if needed.

**The second way to create an AMS360 Activity is to Reply to an email or Forward an email.** QuiKer will automatically detect when an email is successfully sent, and prompt the User to create an Activity.



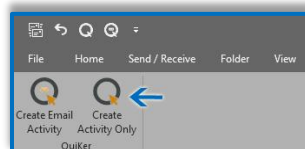
Select “Yes” to complete the Activity screen and click “Create Activity”.

When a User sends emails with their cell phone or mobile device from their company email account, Users will receive the QuiKer pop-up prompting them to Create Activities upon returning to the desktop where QuiKer is installed. Because the To, CC, Subject, as well as the Date and Time of an email are displayed in the pop-up dialog box, Users can easily identify and decide which emails sent via mobile device need to be attached via QuiKer.

The mobile feature can also be used to email yourself notes or documents when out-of-the-office as a way to set a pop-up reminder to attach these items to AMS360 upon returning to your desktop.

**Lastly, a User can Create an Activity that is not associated with an email, providing a convenient tool for detailing client conversations, noting interoffice communications and documenting other essential Activities.**

Select “Create an Activity Only” from the QuiKer tab:

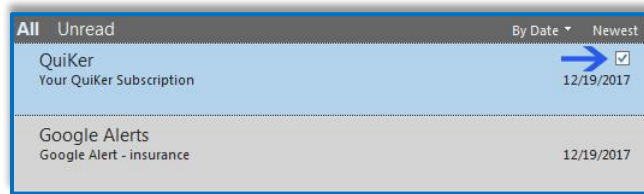


If needed, the User can add attachments or emails to the Activity using QuiKer’s drag-and-drop feature.



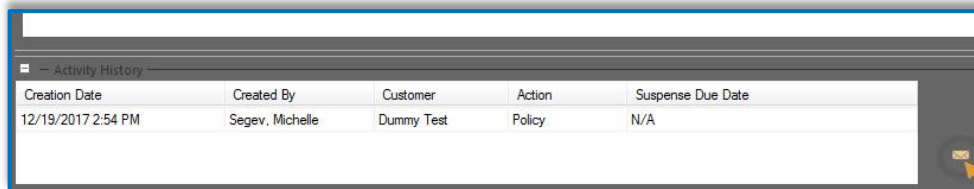
## QuiKer's Audit Feature

QuiKer's Audit feature will place a checkmark (as seen below) next to an email that has been attached to AMS360 via QuiKer, allowing for a quick, visual audit of an Inbox or Sent folder:



## QuiKer's Activity History Feature

QuiKer's Activity History feature appears at the bottom of any email attached to AMS360 via QuiKer, and includes: Creation Date, Created By, Customer Name, Action and Suspense Due Date (if any).

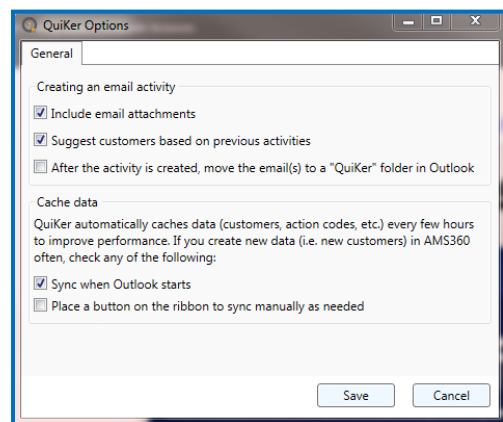


## How to Manage Options

### General Options

The “**General**” section includes four preference settings for Users. The Options include:

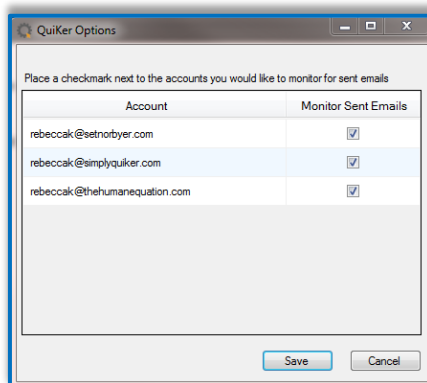
1. “**Include Email Attachments**” option: Users can choose if they want attachments extracted or not extracted from the email. \*Note: If a User chooses to not extract attachment, they will remain embedded in the original email within the Activity.
2. “**Suggest Customers based on previous Activities**” option: If checked, QuiKer will suggest a “Customer” name when QuiKer recognizes an email address from a previously attached Email Activity.
3. “**After the Activity is created, move the email(s) to a QuiKer folder in Outlook**” option: QuiKer will now automatically move Emails attached through QuiKer to a QuiKer subfolder, when electing this option.
4. “**Sync Cache**” option: Users now have the ability to allow QuiKer to cache/sync/refresh when opening Outlook, AND/OR Sync manually.



## Monitored Accounts

Users can set which email account QuiKer monitors. This feature also allows Users to pause QuiKer while away from the office.

To set which mailbox QuiKer monitors, click on the “Options” button in the QuiKer tab and select “Monitored Accounts”. By default, QuiKer will monitor all Sent emails from all mailboxes as seen here:



Users can uncheck any mailbox they do not want QuiKer to monitor. Save all changes.

**Please note:** QuiKer stores persistent data locally on Users’ computers. Permissions to ‘Write’ will allow Users to make changes to the ‘Send Options’ feature of QuiKer. Upon downloading QuiKer, permissions should automatically update.

In some environments QuiKer Options cannot be saved due to conflicting Permissions in a User’s QuiKer Database File. Follow the instructions in the following section to Edit Permissions and manage Send Options.”

## How to Edit Permissions to Manage Options

In Version 3.12, and older, to gain this Permission, please go to: My Documents\The Human Equation\QuiKer AddIn\Data. Right-click the file QuiKer.db and choose Properties. Under the Security tab, click Edit, and then select the group or user name that match the current user and click “Allow” under the permission “Write”.

If you do not see a folder titled The Human Equation in your Documents Library, you will need to create the folder hierarchy. To do this, follow these steps:

- Close Outlook
- Right-click inside the Documents Library and select New > Folder
- Title this folder as “The Human Equation”
- Inside “The Human Equation Folder” right-click to select New > Folder and create a folder titled “QuiKer AddIn”
- Finally, inside “QuiKer AddIn” folder right-click to select New > Folder and create a folder titled “Data”
- Re-open Outlook and send an email

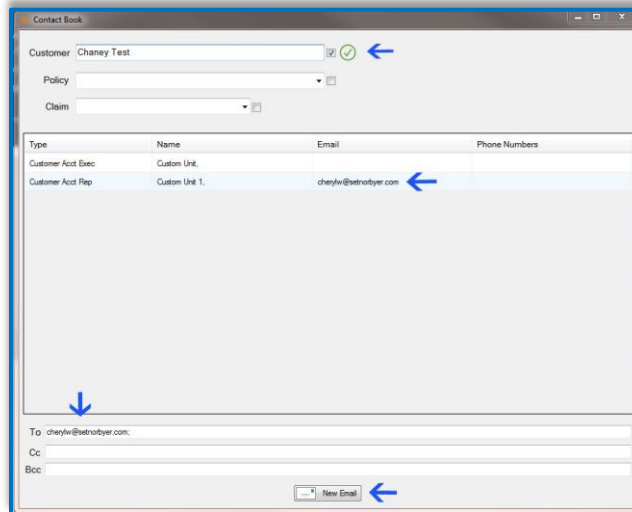
QuiKer should automatically recognize this file path and upon sending an email create the Database File in the “Data” folder. If not, please visit our Knowledge Base to download a new Database File.



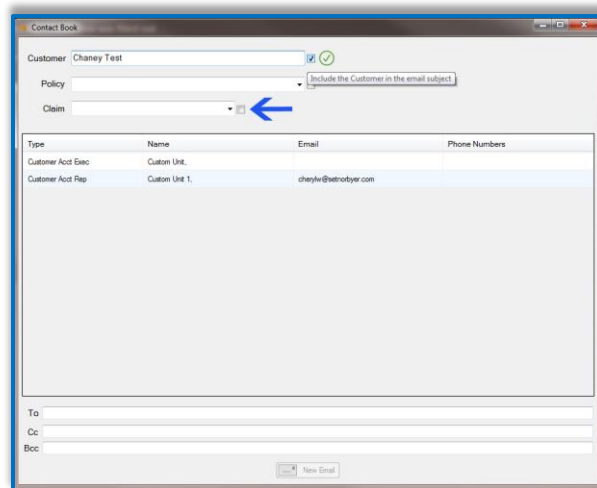
## How to Use QuiKer Contact Book

QuiKer Contact Book can be found in the Outlook Ribbon. To use, click on the Contact Book icon. Enter in a customer's first or last name and select the desired customer.

Next, click on the email address and drag the address into the To, CC or BCC field. Repeat this action or as many email addresses as necessary.



Users can select the checkbox next to the Customer, Policy or Claim to include that field(s) in the Subject line of the New Email as seen here:



Click "New Email". Send the email and select "Yes" in the QuiKer pop-up to Create an Activity.



## Important Information

- Make certain that QuiKer is not installed as an Administrator on the User's machine. It is OK to use Admin credentials if permissions are limited, but the AMS360 User information MUST be entered.
- QuiKer only monitors the Sent folder when sending an email. If the User chooses to change the default Sent folder through the Options Menu within the open email, QuiKer will not trigger. To avoid this disruption, insist Users do not change the default Sent folder. Simply have the User CC themselves, and once the email is received, drag the email to the desired folder.
- Allow Microsoft Outlook's cache to fully update when first opening the program in the morning before using QuiKer. This process only takes approximately 15 seconds.
- Since Outlook has a habit of disabling third party Add-ins within the Ribbon, add QuiKer to the Quick Access Toolbar in both the Microsoft Office Home Tab AND within an Open Email Dialog Box to easily access the "Create Email Activity" button.

### Quick Access Toolbar:

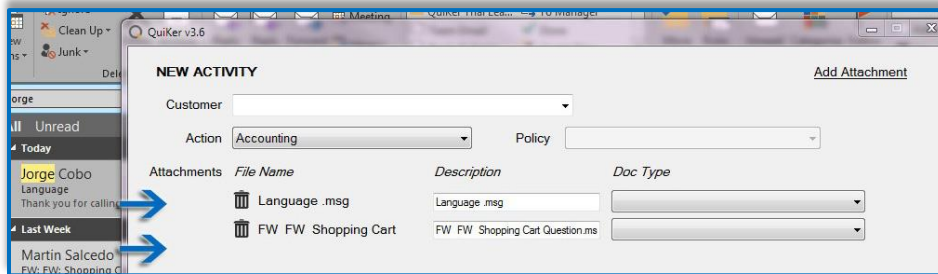
- Right click on the QuiKer tab and select "Customize Quick Access Toolbar".
- In the "Choose Commands From:" dropdown at the top of the screen, select "QuiKer tab".
  - Highlight "Create Email Activity"
  - Click "Add"
  - Click "OK"
  - Repeat this process for all of QuiKer's buttons

### Outlook Ribbon:

- Right click on the QuiKer tab and select "Customize the Ribbon".
- In the "Choose Commands From:" dropdown at the top of the screen, select "QuiKer tab".
  - Highlight "Create Email Activity"
  - Click "Add"
  - Click "OK"
  - Repeat this process for all of QuiKer's buttons
- Once you have added QuiKer to your Quick Access Toolbar, you can customize where you would like this Toolbar displayed. Simply right-click on the QuiKer icon in the Toolbar and select "Show Quick Access Toolbar Above the Ribbon" or inversely, "Show Quick Access Toolbar Below the Ribbon" to move.
- The QuiKer search may yield more Customers than displayed in the User's AMS360 view as QuiKer does not mirror User search preferences. QuiKer displays Active and Inactive Customers, Prospects, and Suspects.
- You can have multiple instances of the QuiKer Activity screen open in Outlook, allowing you to input all client emails and attachments to AMS360 and reduce process time.



- CC'ed Users on an email are automatically added to the Description field within the QuiKer Activity Screen, including them in the Activity being created in AMS360.
- It is important that no separate program, such as antivirus, or special permission is interfering with the programs .exe files when installing QuiKer.
- QuiKer allows Users to attach multiple emails or attachments to one Activity with its convenient drag-and-drop feature as seen below:

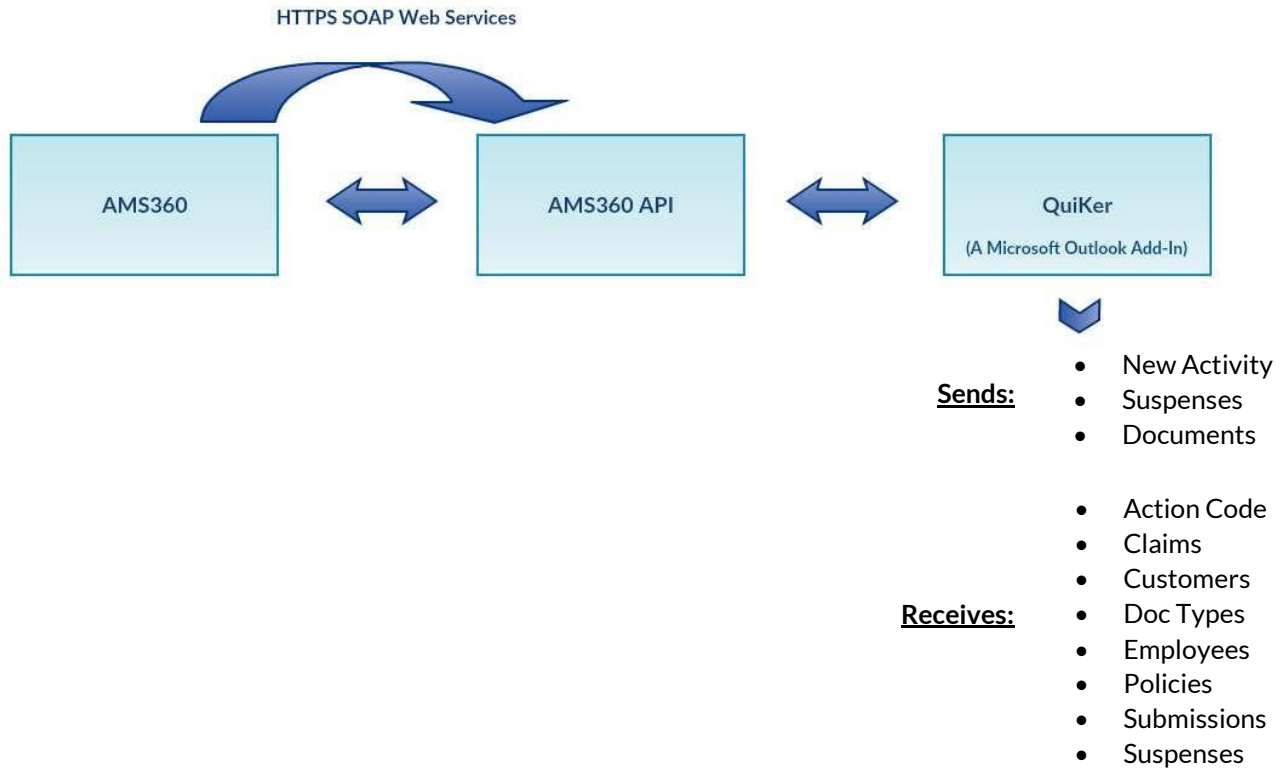


- QuiKer's attachment limit is 100MB.
- Please note QuiKer **does not** retain or store confidential Agency data, and **does not** have access to Usernames and Passwords.



## QuiKer Data Flow

QuiKer transmits information through the official AMS360 API, implemented with SOAP web services technology through HTTPS connections. QuiKer transmits information through HTTPS, an encrypted and secure transmission between the sender and receiver of information. QuiKer follows the TLS protocol, or Transport Layer Security, which maintains data integrity and privacy between computer applications.



## Contact

Please email [helpdesk@simplyquiker.com](mailto:helpdesk@simplyquiker.com) or give us a call at 1-800-521-9667 with any issues or questions.

