

Help Guide For:

Quik! Forms Library Version 5.1

For further support, please visit us on the web at: <u>www.quikforms.com</u>

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Using Quik! Help

Using Online Help

Quik! includes complete documentation and help in an accessible PDF-based system, using Adobe® Acrobat®. The help system includes information on all the features and components of Quik!. This help file is designed to provide easy navigation online, and can be printed out to provide a desktop reference for using Quik!. Additional help can be found on our website at http://www.etiforms.com/support.aspx and in our online KnowledgeBase at http://www.etiforms.com/support_search.aspx.

While this help guide will touch on some of the features of Adobe Acrobat Reader and other versions of Acrobat, should you require more in-depth help with an Acrobat feature, please use the help guide that Adobe provides. You can find Adobe Acrobat help by opening Acrobat and choosing Help > Acrobat Help from the file menu.

Getting and Using Help...

To open Quik! help, choose Help > Contents from the file menu. Help will launch Adobe Acrobat and open the help file. Once open, click on the item you wish to view from the index and the corresponding Help topic will appear. To Move Back use the Back button found on the Acrobat toolbar. If your Acrobat toolbar is not showing, you can show it by choosing Window > Toolbars > Show Toolbars.

To retrace your viewing path, use the Back button on the Adobe® Acrobat® toolbar.

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For additional help, please visit our website (<u>www.quikforms.com</u>) or contact us: <u>help@etiforms.com</u>.

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What's New In This Version

Quik! Forms Library Version 5.1.0

This version of Quik! Forms Library introduces the following new features:

Software Updates

- Combine multiple forms into a single document
- Launch your forms from the web
- Support for remote installations of Quik!
- Enhanced form search capabilities
- Update Service upgraded
- Quik! now supports over 26 different databases!!

New Databases

- GBS
- Inscomm
- Quik! Data Entry Template (MS-Excel)
- Upgrades to several databases
- Enhanced Text File support

Quik! Overview

Overview

Quik! Forms Library

Quik! is a desktop application that automates the process of filling out forms. Forms can be created blank with only the available rep information or when connected to a database, forms can be prepopulated with client information found in your database. Quik! is the perfect complement to your existing contact management system and way of doing business.

When creating forms for clients, Quik! dynamically reads your database to gather client information that can be placed on forms. Once the form is generated, you can make changes to the data on the form without affecting your database. In fact, Quik! does not write any data back to your database – your contact management system will not be modified or changed by Quik! in any way. The advantage to using Quik! is only having to manage your client information in one program!

Quik! is comprised of:

- Your Contact Management Database
- Quik! Forms Library and Forms
- Adobe Reader or Acrobat

When setting up Quik!, you'll be asked to connect Quik! to your database, enter your rep information and download and/or install forms. The entire process should take five minutes or less to setup.

Quik! Update Service

The Quik! Update Service is an application that comes with the Quik! Forms Library. It is designed to interface with the Quik! website to keep your forms and software up-to-date.

When you launch the Update Service, it will automatically download your update file, which indicates which forms need to be updated. Then, each form that can be updated will be downloaded and installed. Overall, this method of finding, downloading and installing forms is highly efficient and requires very little effort on your part. The only thing you have to do is run the Update Service.





Installing Quik!

BEFORE INSTALLING

System Requirements

Quik! has the following minimum system requirements:

Operating System:	Microsoft Windows 98SE, 2000, NT 4.0 with Service Pack 5 or 6, XP (Mac OS is not supported)
Processor Speed:	Intel Pentium Processor
RAM:	128 MB (256 MB recommended)
Hard Disk Space:	150 MB
Browser:	Internet Explorer 5.0 or higher
Internet:	Ability to connect to the internet to download form updates.
Other Software:	Adobe Acrobat Reader 5.0 or higher (Acrobat 4.0 is not supported)

In order to save forms completed using Quik!, you must own the full version of Adobe Acrobat or Adobe Acrobat Approval. Both products are available for purchase on the Adobe website (<u>www.acrobat.com</u>).

READ THIS!

Quik! requires that Adobe Acrobat® Reader®, version 5.0 or higher is installed on each PC using Quik!. If you try to "Start" forms and the form will not launch in Adobe Acrobat, check your version of Acrobat and make sure that you **only** install version 5.0 or higher. Acrobat may not work properly if you have multiple versions installed.

Downloading Quik Software

As a Quik! subscriber, you can download the Quik! software any time you wish, and as many times as you want. The install file, quiksetup.exe, is a program that will install the Quik! software on your computer. We recommend downloading the setup file and saving it to a shared drive on your network or in a folder on your hard-drive where you normally save downloaded software.

To download the Quik! software, log in to <u>www.quikforms.com</u> and click the Download Software link on the home page. Or, click on the My Account button <u>MyAccount</u> located in the left-hand column of the Quik! website. From the My Account page, click the link to the Download Center.

From the Download Center, click the Download button **Download...** to download the software. You will be prompted to Open or Save the file. We recommend that you choose "Save" so you can install the software later on other PCs.

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Installing On A Network – <u>CLICK HERE FOR AN ONLINE TUTORIAL</u>

The power of Quik! Forms Library is enhanced when you share the single program amongst all of your staff in your office. Install Quik! on your network server to share the same forms, groups and rep information, plus you'll only have to get updates for one set of forms. The program will only take a few moments to install.

When installing Quik! onto a server, **you must install the program on the actual server machine** – do not attempt to install to the server from a PC over the network. Alternatively, Quik! can be installed on one PC for a single user (see "Installing On A Stand-Alone PC).

To install Quik! on a network, do the following:

- 1. Go to the actual server machine ask your administrator to help you
- 2. Login to the server with ADMINISTRATOR rights
- 3. Locate the quiksetup.exe file you downloaded
- 4. Double-click the quiksetup exe file to begin the installation program.

The Quik! installation program will prompt you to continue with the screen below.

🙀 Quik! Forms Library - InstallShield W	/izard
	Welcome to the InstallShield Wizard for Quik! Forms Library
	The InstallShield(R) Wizard will install Quik! Forms Library on your computer. To continue, click Next.
	WARNING: This computer program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, including, but not limited to, related templates, forms and files, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
	< <u>B</u> ack <u>N</u> ext > Cancel

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Click NEXT to continue through this screen. Continue clicking next until you get to the screen that asks for a Destination Folder (see image below).

VERY IMPORTANT! During the installation process, you'll be prompted to verify the DESTINATION FOLDER. When installing on a server you must change the destination location on your server to a shared folder where all of your users can access the program. (For example –

D:\SHARED\APPS\QUIK FORMS LIBRARY\). If you accept the default location, you may not be able to access the software from other PCs on the network.

报 Quik! Forms	s Library - InstallShield Wizard	
Destination NETWO Otherwis	on Folder RK INSTALL: Change the location when installing on a server. se, accept the defaults and click Next to continue.	
	Install Quik! Forms Library to: S:\Shared\Apps\Quik\	<u>C</u> hange
InstallShield -	< <u>B</u> ack <u>N</u> ext >	Cancel

Click the Change button to choose a location on your server's hard-drives where network users can access the program. Most system administrators setup the server with one or more shared folders for applications and/or data – after locating a shared folder, create a folder in there for Quik (perhaps called "QuikForms").

The next step will ask you to choose either a "Full Install" or a "Minimum" install. **Choose the Full Install** to install the program. Only choose the Minimum install when setting up individual PCs on a network that will access the program over the network. Click Next to continue.

Quik! Help

Setup Type	
Choose the	setup type that best suits your needs.
Please select	a setup type.
⊙ <u>F</u> ull Insta	
	Use the Full Install when installing on a network server or a standalone PC (not connected to a network). All features installed.
○ <u>M</u> inimum	- For PC's on a Network ONLY
1 ⁴	ONLY use the Minimum install to setup client PCs accessing Quik over a network. Only the minimum required features will be install

After you select the Setup Type (per the image above), continue following any additional prompts, clicking the Next button to continue until you reach the last screen that will prompt you to complete the Install – click the Install button.

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Quik! Help

The wizzrd is ready to begin in			
The wizard is ready to begin in	ISLdiidUON.		
If you want to review or change	ge any of your installa	tion settings, click Bac	k. Click Cancel
to exit the wizard.			
Current Settings:			
Setup Type:			
Minimum - For PC's on			
Destination Folder:			
S:\Shared\Apps\Quik\			
User Information:			
Name:			
Company:			

Once installed, the program will create a shortcut on both your desktop and in your START > PROGRAMS > QUIK menu.

After installing, run the Quik! Forms Library application (double click the Quik! shortcut on your desktop) and follow the setup wizard process to connect Quik! to your database (see "Setting Up Quik! For The First Time").

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How To Setup Network PCs To Access Quik! On The Network

Please visit each PC you wish to run Quik! on and do the following:

- 1. Run the quiksetup.exe program you downloaded to the server.
- 2. During the installation wizard, accept all the default prompts until you reach the Setup Type screen (see below)
- 3. On the Setup Type screen, choose "Minimum".

🙀 Quik! Forms Librar	y - InstallShield Wizard
Setup Type Choose the se	tup type that best suits your needs.
Please select a	setup type.
	Use the Full Install when installing on a network server or a standalone PC (not connected to a network). All features installed.
⊙ <u>M</u> inimum -	For PC's on a Network ONLY
	ONLY use the Minimum install to setup client PCs accessing Quik over a network. Only the minimum required features will be install
InstallShield ———	< <u>B</u> ack <u>N</u> ext > Cancel

4. Continue until you get to the Install screen and click the Install button (see below).

Quik! Help

eady to Install the Program		
The wizard is ready to begin installation	on.	
If you want to review or change any	of your installation settings, click Back. Click Cancel	
to exit the wizard.	-	
Current Settings:		
Setup Type:		
Minimum - For PC's on		
Destination Folder:		
S:\Shared\Apps\Quik\		
User Information:		
Name:		
Company:		

5. Setup a shortcut icon to the Quik! Forms Library program that you installed on the server

A shortcut icon is a desktop icon that points to the Quik.exe (software) file on your network. If you installed Quik! on the server in a location that is shared with all users, you can set up the icon by doing the following:

- a. To setup a shortcut, right-click the mouse in an open area of the desktop. Choose "New" "Shortcut" and follow the prompts.
- b. Browse for the quik.exe file that was installed on your server.
- c. Once you find the file, click Next and follow the prompts to complete the shortcut.

NOTE: In order for Quik! to operate on the network, you must create a shortcut to the program on a **mapped network drive** – a mapped network drive has a letter (e.g. S:\ or H:\, etc.).

6. After completing the first PC install, run the Quik! Forms Library application on the PC you just installed it on. You will be prompted to follow the Quik! setup wizard once again to connect Quik! to your database – you will only have to do this the first time Quik! is run from a PC (see "Setting Up Quik! For The First Time").

NOTE: If Quik! says that the license has expired on the PC you just installed on, simply run the Update Service from that PC. To run the Update Service, click the Get Updates button in the upper right corner, below the Quik! logo.

Installing On A Stand-Alone PC

To install Quik!, double-click the installation file that you downloaded (quiksetup.exe). The program will only take a few moments to install.

🕞 Quik! Forms Library - InstallShield W	fizard
	Welcome to the InstallShield Wizard for Quik! Forms Library
	The InstallShield(R) Wizard will install Quik! Forms Library on your computer. To continue, click Next.
	WARNING: This computer program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, including, but not limited to, related templates, forms and files, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
	< <u>Back</u> <u>Next</u> > Cancel

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Accept the default settings in the install wizard for the Destination Location

🙀 Quik! Form	s Library - InstallShield Wizard	
Destination Folder		
NETWO Otherwi	ORK INSTALL: Change the location when installing on a server. ise, accept the defaults and click Next to continue.	
	Install Quik! Forms Library to: C:\Program Files\Quik Forms Library\ Change	
InstallShield -	< <u>B</u> ack <u>N</u> ext > Cancel	

Quik! Help

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The next step will ask you to choose either a "Full Install" or a "Minimum" install. Choose the Full Install to install the program. Since you are not setting up Quik! to run over a network, you can ignore the Minimum install option.

🙀 Quik! Forms Librar	y - InstallShield Wizard	×				
Setup Type						
Choose the se	etup type that best suits your needs.					
Please select a	setup type.					
⊙ <u>F</u> ull Instal						
1	Use the Full Install when installing on a network server or a standalone PC (not connected to a network). All features installed.					
○ <u>M</u> inimum -	For PC's on a Network ONLY					
1 ¹	ONLY use the Minimum install to setup client PCs accessing Quik over a network. Only the minimum required features will be install					
InstallShield ———	< <u>B</u> ack <u>N</u> ext > Cancel]				

Once installed, the program will create a shortcut on both your desktop and in your START > PROGRAMS > QUIKFORMS menu.

Now that the program is installed, run Quik! for the first time to complete the setup and to connect Quik! to your database. See the next section for more information.

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Setting Up Quik! For The First Time

After installing Quik!, run the Quik! Forms Library to complete the setup. The first time the application is run, you will be prompted to follow a setup wizard which will ask you for your web username and password, a database connection, your rep information and to confirm your internet settings.

Quik! Installation Wizard

Quik! Installation Wizard						
Welcome to the Quik! Forms Library! Follow the steps in this wizard to complete the installation of your Quik! Forms Library.						
Step 1 - Enter your username and password						
Step 2 - Connect Quik! to your database						
Step 3 - Enter your rep information						
Step 4 - Download your forms						

Quik! Installation Wizard: Step 1 of 4

Enter the same username and password you use to login on the Quik! Forms website. This information is used to obtain your form updates.

🖣 Quik! Installation Wizard - Step 1 of 4 🛛 🛛 🔀								
Website Username and Password Please enter your QuikForms website username and password.								
Website Username								
Website Password								
Confirm Password								
NOTE: Passwords are case-sensitive!								
Web Login Back Next Cancel								

Quik! Installation Wizard: Step 2 of 4

To connect Quik! to your database, Step 2 asks you to choose the type of contact management system you use, as well as the location of your database file. *Alternatively, if you do not have a database, you can use the Quik! Database by selecting Quik! Forms Library Database as your database (skip Step 2 if you choose the Quik! Database).*

1. Select Your Database

Start by selecting the database in the list that best matches your contact management system. Quik! supports several database products, and often supports several versions of a given product. For database programs that have a version number similar to "Version 3.X", the "X" refers to any version number (e.g. 3.1, 3.2, 3.3, etc.). If you don't see the version number for your product and Quik! has a lower version number available, then choose the lower version number as Quik! will probably work fine with the higher version numbers.

2. Browse For Your Database File

In order for Quik! to properly read your database, you need to tell Quik! where your database is installed. Click the Browse... button to locate your database. NOTE: When browsing for your database file, make sure you choose the correct network folder or local folder. By default, clicking the Browse button will open a folder where you are most likely to find your database, but your database may or may not be in that folder.

Also, when browsing for your database, be sure to check to see if the database file you select is the most up-to-date file – if the last modified date of your database is not very recent, then you have probably selected the wrong database file.

😨 Quik! Installation Wizard - Step 2 of 4						
Connect Quik! to Your Database						
1. Choose a contact management system from the list below.						
<none></none>						
 Click the "Browse" button to find your database filename. When you find your database filename, select it and click Open. Your database filename will appear below. 						
<u>Browse</u>						
OPTIONAL - If your contact management system requires you to enter a username and password to access your client info, then enter that username and password below. Otherwise, leave these fields blank.						
UserName Password						
<u>B</u> ack <u>N</u> ext <u>Cancel</u>						

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OPTIONAL: UserName and Password

In order for Quik! to access some databases, you may need to enter your database username and password. For example, ACT! databases require your exact username and/or password.

Quik! Installation Wizard: Step 3 of 4

Step 3 will allow you to setup all of your rep information, except for your rep name, which is maintained on our website. The items in BOLD letters are the most commonly used items on forms, though all pieces of information can potentially be used. There are four major pieces of information for each rep – enter the pieces you wish to be pre-populated onto forms (see the screen image below):

- **Personal Office Information** enter the rep's phone number, address, personal info etc.
- **Rep Numbers** enter as many rep numbers or variations of rep numbers as you'd like.
- **Branch Office Information** This information relates to the registered branch office that you work through. If your personal and branch addresses are the same, click the Use Personal Address button to save time when entering data.
- Broker/Dealer Headquarters Information Broker / Dealer information is mostly used on forms for other companies (e.g. mutual funds) where your firm has a selling agreement. If your branch and broker/dealer addresses are the same, click the Use Branch Address button to save time entering data.

			1 9					
🗞 Quik! Installation Wizard - Step 3 of 4								
Include Your Rep Inform The info you enter below may display on time. To ensure your privacy, rep names	nation on Forms certain forms and can be update can only be changed on our we	Items in RED are re ed at any NOTE: The fields w bsite. the most commonly Rep Numbers	equired. with BOLD labels are used fields on forms.					
Rep Name (will download later)	Phone Number Ext	Enter as many rep numbers as n	eeded, but only one					
Thomas Trustman, CFP	(626) 795-9990	rep number at a time can display on a form.						
Address Line 1	Fax Number		Add Rep Number					
501 E. Colorado Blvd, Suite 250	(626) 795-9099	12345	Delete Rep Number					
Address Line 2	Email Address	98001 / JK7						
	tom@trustman.com	JK7						
Address Line 3	Rep Soc Sec Number							
City State Zip I	Code Date of Birth							
Pasadena CA 911	01							
-Branch Office Information -	Use Personal Address	-Broker/Dealer Headquarte	rs Information ——					
Branch Company Name	Supervisor Name (OSJ)	Broker/Dealer or Company Name	Use Branch Address					
Trustman Investor & Services	Trustman	Trustman Investor & Services						
Address Line 1	Branch ID/Number	Address Line 1	Phone Number					
501 E. Colorado Blvd, Suite 250	91092	501 E. Colorado Blvd, Suite 250	(626) 795-9990					
Address Line 2	Phone Number	Address Line 2	Fax Number					
	(626) 795-9990		(626) 795-9099					
Address Line 3	Fax Number	Address Line 3						
1	(626) 795-9099	1						
City State Zip	Code	City State Zip (Code					
Pasadena JCA 9110	וו	Pasadena CA 911	01					
		<u>U</u> ndo <u>B</u> ack	<u>N</u> ext <u>C</u> ancel					

Quik! Installation Wizard: Step 4 of 4

Quik! relies on your internet connection in order to download form updates and the latest information about your subscription. The last screen in the Quik! Installation Wizard asks you to configure your Update Service and Internet Settings.

Update Service Settings

For most users, accepting the default settings will be optimal. By default, the Update Service will run on Automatic mode. Automatic mode means that when you run the Update Service it will automatically check for updates, and download and install any updates without you having to do anything. If you prefer to have more control over the process and to choose which forms download, then change the settings to Manual mode. **NOTE: Automatic is best, especially if you schedule your Update Service to run over night** (see the section on the "Scheduling The Update Service" for more details).

Internet Settings

To allow Quik! to access the Internet, you may need to configure your Internet Settings. If your company uses a proxy server to access the Internet, check the check box for the proxy server and enter your proxy server settings. To check your proxy settings, click the Configure button, which will show you your computer's Internet Settings – click the LAN button on that screen and see if you have a proxy server configured (the settings look similar to the Quik! screen below).

Quik! Installation Wizard - Step 4 of 4					
Settings					
Update Service Settings The Update Service checks for and installs form updates automatically.					
Automatic C Manual NOTE: For best results, schedule the Update Service to run periodically adding UpdateService.exe as a task in the Windows Task Scheduler and selecting the Automatic mode above (see Help for more info)					
Remind me to run the Update Service every 30 days. (Enter 0 days if you do not want to be reminded.)					
Your Internet Connection Speed DSL/Cable					
Internet Settings The Update Service can only check for updates when you are connected to the Internet, and will rely on your default settings. If you use a proxy server, please enter those settings below.					
I use a proxy server to connect to the Internet					
Address: Port: Port:					
Administrator Settings Check the Disable PC Features checkbox to disable most of the Quik! Tools menu for users running Quik! on the network. (Do not disable during setup.)					
Disable PC Features Allow users to start 12 forms at once.					
<u>B</u> ack <u>Cancel</u>					

To schedule the Update Service to run, you will need to schedule a task in your Windows Task Scheduler (see the section on the "Scheduling The Update Service" for more details).

Administrator Settings

When you setup Quik! on a network, you can use the Administrator Settings in Quik! to restrict PC users from performing certain tasks in Quik!. By clicking the Disable PC Features checkbox, you will remove the following items from the Tools menu in Quik! when you use Quik! on a PC:

- Map Data Fields...
- Database Connection...
- Backup User Files...

- Restore User Files...
- Export All Records

Additionally, you can control the number of forms a user can start at once. This reason to control the number of forms is to help PC users manage their PC's memory and to avoid crashing the computer by trying to open too many files at once. By default, a user can only launch 12 Adobe Acrobat files at the same time – you can change this by entering a different number. We recommend 12 as a safe operating limit and at least 6 to ensure that the Form Group feature allows users to create sufficiently large form groups.

Installing Forms

Quik! does not come pre-loaded with any forms. To get forms, you must login to our website, search for forms and select the forms you want to add to your personal library (see *"Finding Forms" for more details*). Once you have selected the forms you want, run your Update Service to check for updates and to download and install those forms (see the next section *"Running The Update Service"*).

Running The Update Service

To launch the Update Service, open Quik! Forms Library and click the "Get Updates" button, located in the upper right corner, under the Quik! logo.

The service can be run in Automatic mode (recommended) or in Manual mode (you can change your mode by navigating to "Settings" and choosing "Update Service Settings..." in the menu bar).



The Update Service can operate in two different modes: Automatic or Manual.

In **Automatic mode**, the Update Service will check for updates, download any available updates (including new forms that you recently found and subscribed to on the website), and then close itself after the updates are completed.



Quik! Help

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Efficient Technology Inc - Q	uik! Update Service							
Update Service	Welcome to the Quik! Update Service Error Report Settings Help Last check for updates was on: 6/23/2004 at 7:17:20 PM Version 1.2.10							
	The checkmarked files will be updated.		Show Software Updates					
Take The Work Out of Paperwork!	Dealer	Category	Form Name					
	AIG SunAmerica Fund Services	Retirement Planning	AIG-SA Beneficiary Form					
	AIG SunAmerica Fund Services	Retirement Planning	AIG-SA Individual 401k A					
	AIG SunAmerica Fund Services	Retirement Planning	AIG-SA Transfer Form-IR					
	AIG SunAmerica Fund Services	Retirement Planning	Application for IRAs					
	AIG SunAmerica Fund Services	Annuities	Deferred Annuity Applica					
	AIG SunAmerica Fund Services	Mutual Funds	Mutual Funds Account A					
	AIG SunAmerica Fund Services	Insurance	NY Polaris II Telephone /					
	AIG SunAmerica Fund Services	Admin	Polaris II 1035 Transfer F					
	AIG SunAmerica Fund Services	Annuities	Polaris II NY Application					
	AIG SunAmerica Fund Services	Admin	Polaris II NY Reg 60					
	AIG SunAmerica Fund Services	Admin	Polaris Platinum II VA Tra					
Number of Files To Update: 1 Download Size: 41 kb	AIM Advisors	Admin	Aim Account Application					
Est Download Time: 1 seconds	Seject All Unselect All Update fi	le refreshed. 1 Upd	ates Available!					
Add Forms Remove	Start Stop		E <u>x</u> it					
Status		6/23/200	04 7:17 PM					

Manual mode requires that you click the Start button in the Update Service to begin downloading any updates. Manual mode allows you to choose which forms you want to download, which is useful if you want to force a form to download even if it there are no updates available (for example, perhaps you accidentally saved the form with data in it and want a clean copy to use, you may want to force the form to download again).

Software Updates

The Update Service also handles automated software upgrades and updates. Periodically, Quik! software will need to be updated to roll out the latest version of the software. While this is handled automatically in Automatic Mode, if you wish to update your software manually, check the Show Software Updates box.

Install Adobe Acrobat Reader

For Quik! to display and pre-populate forms, you need to have Adobe Acrobat Reader version 5.0 or higher. If you do not have Acrobat, you can download the free Acrobat Reader from <u>www.acrobat.com</u> or by visiting our alliances web page and clicking on the link to the Adobe Reader there (<u>http://www.etiforms.com/alliances.aspx</u>). Be sure to uninstall any previous versions of Acrobat Reader before installing the new one, as previous versions may cause errors when using Quik!.

Uninstalling Quik!

To uninstall Quik!, please use your Windows Uninstall program. The uninstall program is found by opening the Control Panel, found under the Windows "Start" button and navigating to your "Settings". Open the Control Panel and choose "Add/Remove Programs". Find the "Quik Forms Library" application and choose the "Add/Remove" button. Follow the prompts to uninstall Quik! – this process should only take a few moments.

When uninstalling Quik!, not every file will be removed automatically. This is to make sure that you don't lose sensitive data (e.g. the Quik! Database file – quik.eti) or your settings should you decide to reinstall Quik! again later. To fully remove the Quik! program after uninstalling, open your Windows Explorer (right click on the Start button and choose Explore) and navigate to the Quik! Forms Library folder (c:\program files\quik forms library\) and delete the folder and all of it's contents.

Connecting To Your Database

Supported Databases

Quik! seamlessly integrates with over 20 databases. This means **you do not have to export data** from your old database or import the data into Quik!. In fact, Quik! does not import your data at all!

To connect Quik! to your database, choose the Tools menu and select Database Connection. The database connection screen will appear.

- 1. Choose a supported database from the drop down list.
- Browse for your database file located either on your hard-drive or somewhere on your server. NOTE: When browsing for your database file, make sure you choose the correct network folder or local folder. By default, clicking the Browse button will open a folder where you are most likely to find your database, but your database may or may not be in that folder.

Also, when browsing for your database, be sure to check to see if the database file you select is the most up-to-date file – if the last modified date of your database is not very recent, then you have probably selected the wrong database file.

3. Save your changes.

👿 Database Connection	X						
Connect Quik! to Your Database							
1. Choose a contact management system from the list below.							
Quik! Forms Library Database	e 🔽						
 Click the "Browse" button to find your database filename. When you find your database filename, select it and click Open. Your database filename will appear below. 							
C:\Program Files\Quik Forms Library\System\							
OPTIONAL - If your contact management system requires you to enter a username and password to access your client info, then enter that username and password below. Otherwise, leave these fields blank.							
UserName Password							
1	Saus Canad						

OPTIONAL: UserName and Password

In order for Quik! to access some databases, you may need to enter your database username and password. For example, ACT! databases require your exact username and/or password.

NEW FEATURE !!! Advisors Assistant – Custom Address Setup

When connecting to an Advisors Assistant database, sometimes the default settings won't allow Quik! to read your home and business addresses. To fix this situation, you should first look at how you categorize your home and business address types within Advisors Assistant. By clicking on an address and going to edit mode, you'll see a drop-down list of address types – click on this drop-down to display the address types you have in your database. The default "Home Address" type is HOME and the default "Business Address" type is ADDRESS, however, you may have setup a custom type like "RESIDENCE" or "H" for Home Address.

If you determine that your database has a custom address type, then next determine if you have assigned any client records to that type. The easiest way to find out is to delete the address types you don't plan on using – if any client records have been assigned this address type, a message will prompt you with a list of clients who's records rely on this type, and you won't be able to delete the type. If you have multiple types for home address, then you need to make sure that your client's primary home address (for each database record) is assigned to just one address type.

Next, in the Database Connection window in Quik! (from Tools, choose the Database Connection... option), if you are using a custom address type, enter the type name for your home address (e.g. HOME for home address) into the Home Address Type and the business address type into the Business Address Type box. This will allow Quik! to refer to these type names when searching for your client's home and business address.

🗑 Database Connection							
Connect Quik! to Your Database							
1. C <u>h</u> oose a contact manager	ment system from the list below.						
AdvisorsAssistant (2.7.66 and	d higher) 📃 🗾						
 Click the "Browse" button to find your database filename. When you find your database filename, select it and click Open. Your database filename will appear below. 							
C:\Program Files\Quik Test DB\AdvisorsAssis							
OPTIONAL: Enter the TYPE ID of the Home Address and Business Address types if you use custom types in your database. Leave blank for default values.							
Home Address Type Business Address Type							
H%	B%						
	Save Cancel						

NOTE: If you have multiple address types for home or business, and all are being used, you may be able to have Quik! find all of the records by using a "%" in the Home Address Type. For example, if you have "H" and "HM" and "HOME" all relating to the primary Home Address type, then if you enter "H%" in the Home Address Type box in Quik!, Quik! will find the first occurrence of any address type

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starting with the letter "H". Be careful, because if you have any address type that starts with the letter "H", that record may be used instead of the Home Address you intended.

Connecting Quik! To Albridge (Formerly StatementOne)

Quik! has formed a relationship with Albridge to allow Quik! to utilize Albridge data directly. Quik! supports Albridge in two ways – Albridge Web Services or Master Client Information export.

Albridge Web Services

Albridge's Web Services offers the most dynamic and robust method for an advisor to access clean data for use on Quik! Forms. The combination of Albridge Web Services and the Quik! Forms Library Database gives you a system that is easy to update and maintain, plus the Web Services offers more client data than any other method (e.g. date of birth, social security number, etc.).

NOTE: To use Albridge Web Services, you must first speak with your broker/dealer and/or Albridge to be sure that you are setup to use Web Services. If your broker/dealer has not enabled Web Services, you will have to use the Master Client Information export.

To setup Quik! with Albridge Web Services, choose Albridge Web Services as your database (see image below). You do not need to browse for your database, but be sure to enter your Partner User ID (typically your Quik! Username, but it can be anything and is issued by your broker/dealer).

🗑 Database Connection 🛛 🔀						
Connect Quik! to Your Database						
1. Choose a contact management system from the list below.						
Albridge (StatementOne) Web Services						
 Click the "Browse" button to find your database filename. When you find your database filename, select it and click Open, Your database filename will appear below. 						
C:\Program Files\Quik Forms Library\System\						
REQUIRED: Please enter the StatementOne user ID your broker/dealer provided to you to login to StatementOne Web Services for Quik!.						
Partner User ID						
<u>Save</u> <u>Cancel</u>						

Click Save when you are done, and you are ready to begin using Quik! with Albridge Web Services.

To Import Data From Albridge Web Services

Once you have set up the Albridge Web Services database connection, the next step is to import your data. Start by clicking the Enter Clients button located at the top of Quik! Forms Library main screen. The Quik! Forms Database screen will appear.

Next, begin the Albridge import process by clicking the Albridge button located at the bottom of the Quik! Forms Database screen. The import process will begin communicating with the Albridge web services and automatically import your data – follow the prompts to complete the process.

🖗 Quik! Forms Database											
Quik! Forms Database Use the Quik! Forms Database to manage client information that can appear on forms. Instructions: Click on Houshold to display a list of Contacts, and then click on a Contact to display associated Accounts. Enter as many Contacts per Household and as many Accounts per Contact as necessary.											
STEP 1: Household	First Name	Steven		Middle Nam	ne J			Last N	ame Haw	kings	_
Hawkings, Steven J Jordan, Michael J							Add Household Delete Save Cancel			ancel	
Norton, Edward Perignon, Dom	<u>First Name</u>	Julia		Middle Nam	ne			Last N	ame Haw	kings	-
	Туре	Spouse 🗾	DOB 4/0	4/1957 SS	N 123	3-23-1232	Gender*	1	🚽 Marit	al Status*	-
	Citizenship		Go	ovt ID Numb	er			Go	vt ID Issue	t	_
	Home A	Address and F	Persona	ıl Info		Work Ac	ldress a	and En	nployer	Info	
	Address 1	8822 Millenium Driv	/e			Employer			Tit	le	
	Address 2			-		Occupation			Yrs	s Employed	
STEP 2: Contacts	Address 3		Phone	(310) 555-	9090	Address 1					
Hawkings, Steven	City	Culver City	Fax	(310) 555-	0999	Address 2			Ph	one	
- 15	State	CA Zip 90034	Cell			Address 3			Ex	t j	
	Country	USA	Other			City			Fa	×	
	Email	hawkings@email.c	com			State	Z	iip 🛛	Co	untry USA	
	Gross Inc	125,000	Fed Tax Br	acket	28%	Notes					
	Net Worth	4,250,000	State Tax I	Bracket	15%		Add Co	ntact	Delete	<u>S</u> ave C	ancel
STEP 3: Accounts	A					6					
	Account N				_						
	Teu Chat						6.11.6		Delte		
Add Account Delete Save Cancel					ancel						
*These fields do not populate	i <u>red.</u> on forms.						Albrid	lge	<u>B</u> ackup	<u>Close Data</u>	base

Master Client Information Export File

If you don't have access to Albridge's Web Services, you can still use Albridge data with Quik! by exporting the Master Client Information report from Albridge.

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To obtain the Master Client Information report, log into Albridge and go to the Reports section. Choose the Master Client Information report and export the data to your hard drive. Be sure to save the data file to a location where you can find it easily.

To connect Quik! to your Master Client Information file, choose "Albridge Master Client Export" as your database. Then, click the Browse button to find your export file.

🗑 Database Connection						
Connect Quik! to Your Database						
1. Choose a contact management system from the list below.						
StatementOne Master Client E	Export		•			
2. Click the "Browse" button to When you find your database Open. Your database filename	2. Click the "Browse" button to find your database filename. When you find your database filename, select it and click Open. Your database filename will appear below.					
			Browse			
OPTIONAL - If your contact management system requires you to enter a username and password to access your client info, then enter that username and password below. Otherwise, leave these fields blank.						
UserName	Name Password					
		<u>S</u> ave	<u>C</u> ancel			

After you click Save, Quik! will modify your export file to make sure it is properly formatted for Quik! to use.

Additiona	l Setup Required
(į)	The database you have chosen is the Master Client export from StatementOne.
	Each time you download a new file, be sure to choose Setup Text File from the Tools menu to ensure your text file is properly formatted. The Setup Text File feature will be run automatically this time.
	ОК

To refresh the Master Client export file from Albridge, download the new file and replace the existing one. Then, from within Quik!, go to the Tools menu and choose Setup Text File to ensure the file is properly formatted. NOTE: Only run this process once, otherwise your text file may become corrupted and require that you download it again.

Use A Text File As Your Database

Quik! can read a properly formatted text file, enabling you to use data from a non-supported database as a data source to pre-populate forms. When setup, Quik! will read the text file as necessary, but Quik! will NOT import the text file. This means that if you update your text file, Quik! will be updated automatically, allowing you to re-export your data as necessary to the same exact format and file name.

Since the connection between Quik! and your text file is dynamic, you can update Quik! by simply exporting your text file to the same location (either on your pc or network) and to the same file name any time you update your database. The only time you need to change anything in Quik! is when you add or remove fields in your export file.

Export Your Data

Use your database program to export your data into a comma-separated-value text file. The exported text file must conform to the following specifications:

- 1) **Include field names as a header.** The first record exported should be the field names from your database.
- 2) The first three columns in your export file must be in the following order:
 - a. Field 1 = Unique ID unique record identifier for your database must be in the first field
 - b. Field 2 = Last Name either the client's last name or full name should be in the second field
 - c. **Field 3 = First Name** either the client's first name, last name or some other relevant field.
 - d. The remaining fields can be exported in any order you wish.
- 3) The data must be exported in comma-separated-value text file (CSV).
- 4) When exporting your data, if asked for a text delimiter (a character that indicates the beginning and ending of a field's value), use the double quote mark (") as the text delimiter.

Once you have exported your data, use Quik! to choose the Text Files connector as your database (see below). The Database Connection screen is found by choosing Database Connection from the Tools menu.



Once you have chosen Text File as your database type, then click the Browse button and select your text file.

NEW FEATURE !!! OPTIONAL: Ensure Your Text File Setup

To ensure that your text file is properly formatted for Quik!, you may want to run the Setup Text File command from the Tools menu. This function was developed for databases like Maximizer where the export file does not contain a truly unique identifier in the first column – running this function will correct the problem.

Map Your Data

Finally, after you have chosen your text file, you will need to map to the data from your text file to the fields available on forms. The process of mapping data will only have to be done the first time you define your export file or if you change your export file. **Please see the Advanced section titled Manage Data Fields for instructions on mapping your data to Quik!**.

Non-Supported Databases

If your database is not listed in the drop-down list, please let us know which database you use by sending an email to: <u>support@etiforms.com</u>.

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Rep Information

Update Rep Information

To update Rep Information, select "Settings" from the menu and then select "Rep Info". Or click the Rep Info button on the Quik! Forms Library screen. When the Registration screen appears, type in any of the data you wish to update. The only field you cannot change from this screen is the Rep Name that appears on your forms. To update your Rep Name, click on the Rep Name field, which will log you into the website and allow you to update your rep name.

There are four major pieces of rep information that may appear on forms:

- **Personal Office Information** enter the rep's phone number, address, personal info etc.
- **Rep Numbers** enter as many rep numbers or variations of rep numbers as you'd like.
- **Branch Office Information** This information relates to the registered branch office that you work through. If your personal and branch addresses are the same, click the Use Personal Address button to save time.
- Broker/Dealer Headquarters Information Broker / Dealer information is mostly used on forms for other companies (e.g. mutual funds) where your firm has a selling agreement. If your branch and broker/dealer addresses are the same, click the Use Branch Address button to save time.

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Quik! Installation Wizard - Step 3 (of 4	
Include Your Rep Inform The info you enter below may display on time. To ensure your privacy, rep names of Personal Office Information	nation on Forms certain forms and can be update can only be changed on our we	Items in RED are required. ed at any NOTE: The fields with BOLD labels are bsite. the most commonly used fields on forms. Rep Numbers Rep Numbers
Rep Name (will download later) Thomas Trustman, CFP	Phone Number Ext (626) 795-9990	Enter as many rep numbers as needed, but only one rep number at a time can display on a form.
Address Line 1	Fax Number	Add Rep Number
501 E. Colorado Blvd, Suite 250	(626) 795-9099	12345 Delete Rep Number
Address Line 2	Email Address	98001 / JK7
	tom@trustman.com	JK7
Address Line 3	Rep Soc Sec Number	
City State Zip 0	Code Date of Birth	
Pasadena CA 911	01	
-Branch Office Information -	Use Personal Address	-Broker/Dealer Headquarters Information-
Branch Company Name	Supervisor Name (OSJ)	Broker/Dealer or Company Name Use Branch Address
Trustman Investor & Services	Trustman	Trustman Investor & Services
Address Line 1	Branch ID/Number	Address Line 1 Phone Number
501 E. Colorado Blvd, Suite 250	91092	501 E. Colorado Blvd, Suite 250 (626) 795-9990
Address Line 2	Phone Number	Address Line 2 Fax Number
	(626) 795-9990	(626) 795-9099
Address Line 3	Fax Number	Address Line 3
	(626) 795-9099	
City State Zip (Code	City State Zip Code
Pasadena CA 9110)1	Pasadena CA 91101
		Undo Back Next Cancel

Managing Forms

Adding Forms (Subscribing To Forms)

Adding forms is done online at our website. The easiest way to login to the website to add forms is from within the Quik! Forms Library. Simply choose "Online" on the menu bar and then choose "Find More Forms...". Your web browser will be launched and you will be automatically logged into our website and taken to the Find Forms page.



From within the Find Forms web page, search for forms by

dealer or keyword. Once you find the forms you want, checkmark the form in the ADD column, and click Save Changes at the bottom of the page.

餐 Quik!	Efficiency at Wo	ork - Mie	crosoft	Internet I	Explorer										_ 8 ×
<u>F</u> ile <u>E</u>	dit <u>V</u> iew F <u>a</u> vorites	: <u>T</u> ools	: <u>H</u> elp	j2)S	end										
< ⊕ Back	► → - Forward	💌 Stop	⊈¢ Refre) esh Ho	ome Sear) 🔝 🤄 ch Favorites Me	🕑 🧭 edia History	Mail	🎒 Print	Edit) Discuss	😿 Messenger			
A <u>d</u> dress	http://www.etiform	ns.com/fi	ndfiles.a	spx									•	∂Go	Links »
															_
										1 <u>2 3</u>					
		Add	Rem	Dealer	Category	Form Name	e De	scription	Added?	Form Status					
				Putnam Funds	Admin	Check Writing Pr	rivelege			Active					
				Putnam Funds	Admin	Systematic Inves Plan SIP Form	tment			Active					
				Putnam Funds	Admin	Systematic With Plan SAP Form	drawal			Active					
				Putnam Funds	Admin	Telephone Reden Authorization	nption			Active					
				Putnam Funds	College Planning	CollegeAdvantage Account App exc	e New I Ohio			Active					
				Putnam Funds	College Planning	CollegeAdvantage Systematic Inves Plan ex OH	e CollegeA tment Systemat Plan exc	dvantage ic Investment ludes Ohio		Active					
				Putnam Funds	Retirement Planning	403b Employee Adoption Agreem	ient			Active					
				Putnam Funds	Retirement Planning	403b How to Esta a Custodial Acco	ablish unt			Active					
				Putnam Funds	Retirement Planning	403b Max Contrib Worksheet	oution			Active					
				Putnam Funds	Retirement Planning	403b Salary Redu Agreement	uction			Active					
		Dov This tell u	vnload search <u>s</u> and w	Forms will give y /e'll do ou	vou a list of for r best to get it	ms currently availabl for you.	le. If you don't se	Sav e a form you'r	e Change	123 s					
Dorra		MyFo	o <u>rms</u> - s	ee and/o	r remove the f	orms you have chose	en to download a	ind use.					in latera	-+	<u> </u>
C Done													🥣 intern	ei 👘	

Removing Forms (Unsubscribing To Forms)

Removing forms is done online at our website. The easiest way to remove forms is login to the website from within the Quik! Forms Library. Simply choose "Online" on the menu bar and then choose "Remove Forms...". Your web browser will be launched and you will be automatically logged into our website and taken to the My Forms page.

From within the My Forms web page, find the form you wish to remove and place a checkmark in the REM column, and click Save Changes at the bottom of the page.





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One of the more powerful features of Quik! is the ability to define groups of forms. For example, you

might create a group of the forms required to open a new account. Then, whenever you need to open a new account, choose the New Account group and all of the required forms will be pre-selected. Plus, you can always add or remove forms from the pre-selected group before clicking the START button.

Step 2 - Select Forms Form Groups - Choose a Group of Forms New Group Dealer Alliance Capital

To create a group, click the "New Group" button on the main Quik! screen.

Quik! Help

Create A Group of Forms

group you wish to create. Next, checkmark the forms you wish to add to the group.

In the Form Groups

window, start by typing the name of the

Finally, click the Save button to save your group.

You can also delete a group by choosing the group name and clicking the Delete button.

Step 1 - Name The Group 🥣	Type or select the name Pershing New Account w	of your group in the box below. / Margin
Step 2 - Select Forms Se	arch <u>C</u> lear 2460 for	ms found.
Dealer	Category	Form Name
Pershing	Brokerage Accts	Margin (Credit Advance) A greement
Pershing	Brokerage Accts	New Account Form
AIG SunAmerica Fund Services	Retirement Planning	AIG-SA Beneficiary Forms-IRAs
AIG SunAmerica Fund Services	Retirement Planning	AIG-SA Individual 401k App
AIG SunAmerica Fund Services	Retirement Planning	AIG-SA Transfer Form-IRAs
AIG SunAmerica Fund Services	Retirement Planning	Application for IRAs
AIG SunAmerica Fund Services	Annuities	Deferred Annuity Application
AIG SunAmerica Fund Services	Retirement Planning	Designation or Change of Beneficiary
AIG SunAmerica Fund Services	Brokerage Accts	Journal Authorization Form
AIG SunAmerica Fund Services	Mutual Funds	Mutual Funds Account Application
AIG SunAmerica Fund Services	Admin	Non-Erisa 403(b) Annuity Special Tax Not
AIG SunAmerica Fund Services	Annuities	Polaris Choice Deferred Annuity App
□ AIG SunAmerica Fund Services	Admin	Polaris II 1035 Transfer Form

NEW FEATURE!!! Search For Forms: Use the Keyword Search at the top of the Form Groups screen to find the forms you need. Enter one or more words and click the Search button or <ENTER> key on your keyboard. The search will only display the forms that match your search word(s). After you check the forms you want, you can search again and the forms you selected will remain at the top of the list. If you want to clear your search but keep your selected forms, click the Clear button. To reset your search and selected forms, click the Reset button.

Request A Form

If you need a form built that we don't currently have in our system, please send the form to us. In most cases, we will build the form for free within 10 business days, if not much sooner.

To request a form, first download the form from your dealer's website and save it on your hard-drive.

Second, click on "Request A Form" from the Online menu within Quik! Forms Library. Then, your web browser should be launched and the Submit Form Or Dealer Request screen should appear (see below). Click on the **Send Form** link below.



Next, the Send Us Your Form page will appear, enabling you to upload your file directly to our server.

Quik! Help

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Address 🛃 http://www.etifo	orms.com/submitformreq_sendform	1.aspx		So Links
Take the Work Out of Paperwork	Home Products	Find Forms	Support Alliances	About Us
Logout My Forms MyAccount	Send Us Your Form There are three ways you can sen 1 - Upload Your Form Directly To To Upload: Browse for your file on click the upload button. Max file si	d a form that you v Our Server: your hard drive and th ze is 2 megabytes.)	vould like built for the Quik! For	ms Library Browse
"When I signed up my first client and	Dealer Name		Please provide the dea	ler name for this
discovered that I had to fill out all the paperwork	Form Name		Please name your form	1.
by hand, I knew there had to be a better way	Form Description		Please describe your fo	orm.
that's why I developed Quik!"	Instructions		Do you have any speci	fic instructions?
- <i>Richard Walker</i> Quik! Co-Founder and Financial Planner	Uploading may take a few minutes only click the Upload File button o	, depending on the fil noe.)	e size. Please be patient while the fil	Upload File e uploads. (Please

To upload your file, click the Browse button and select the file you wish to upload. Second, type in a dealer name (the company whose form you are sending), the form name (the name that describes the form, not the file name per se), a description of how the form should be used (e.g. "use this form to open a new account") and any instructions you wish us to have about this form. To complete the upload process, click the Upload File button.

Please repeat this process for each form you wish to send to us – that way each request is logged into our system and we know exactly who sent the form to us.

Using Quik!

How Quik! Forms Library Works

Creating forms with Quik! is a three-step process: choose a client, choose a set of forms and start forms.

Step 1 - Choose a Client

Start by choosing a client, or leave the client drop-down blank to create a blank form. You also have the option to choose a spouse or joint relationship to the client.

Quik! Forms Library
<u>File Settings Iools Online H</u> elp
Step 1 - Choose A Client 🤜
▼
<pre></pre>
David, Jones
Dillon, Cheryl L
Keller, Steven
Walker, Rich
d Weiss, Rudy
atep z - aelect rorms

Client vs. Spouse vs. Joint: The Client, Spouse and Joint radio buttons under the Client drop-down box are intended for use with databases where client and spouse, and other relationships, are stored. Such databases include dbCAMS and some versions of ACT! and Goldmine. By choosing spouse, the form will be created for the spouse record. If you choose Joint, the form will be created for the client and spouse information will be entered for any joint information on forms.

C Client C Spouse C Joint - Both Spouses

Choose a Contact: If you are using dbCAMS+ or another database that supports additional levels of detail, you can also choose a related client name. For example, choosing a Contact allows you to choose anyone in the client family that you have entered into your database.

Quik! Forms	Library	
<u>F</u> ile S <u>e</u> ttings <u>T</u>	ools <u>O</u> nline <u>H</u> elp	
Step 1 - Ch	oose A Client 🤝	
Weiss, Ru	dy	•
Client	C Spouse	C Joint - Both Spouses
(Optional C	Client - Choose a Client R	elationship.)
Contact		•
Account	<blank> Weiss, Jodi</blank>	
Step 2 - Se	Weiss, Jordan Waiss, Bandu	
Form Groups -	Weiss, RandyNoAcct	
New <u>G</u> roup	Weiss, Rudy	

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Choose a Client Account: If you are using dbCAMS+ or another database that supports additional levels of detail, you can also choose a related account for the owner you chose. For example, choosing an account will populate the form with the account registration and account number if applicable.

🚬 Quik! Forms	Library	
<u>F</u> ile S <u>e</u> ttings <u>T</u>	ools <u>O</u> nline <u>H</u> elp	
Step 1 - Chi	oose A Client 🤜	
Weiss, Ru	dy	•
🖲 Client	C Spouse	C Joint - Both Spouses
(Optional C	lient - Choose a Client Rel	ationship.)
Contact	Weiss, Jordan	▼
Account		•
Step 2 - Se	<blank> JORDAN 12345 - Jordan</blank>	Custodian Acct

Step 2 – Select Forms

Forms can be selected one by one or as a group.

Individual Forms: Each form can be selected individually by scrolling down to the correct form name and placing a checkmark for each form. Be careful not to select more than 12 forms at a time.

ew <u>G</u> roup	•		
Dealer	Category	Form Name	Description
AIG SunAmerica Fund Services	Retirement Planning	AIG-SA Beneficiary Forms-IRAs	
AIG SunAmerica Fund Services	Retirement Planning	AIG-SA Individual 401k App	
AIG SunAmerica Fund Services	Retirement Planning	AIG-SA Transfer Form-IRAs	
AIG SunAmerica Fund Services	Retirement Planning	Application for IRAs	
AIG SunAmerica Fund Services	Annuities	Deferred Annuity Application	
AIG SunAmerica Fund Services	Retirement Planning	Designation or Change of Beneficiary	IRA Retirment
AIG SunAmerica Fund Services	Brokerage Accts	Journal Authorization Form	Transfer from I
AIG SunAmerica Fund Services	Mutual Funds	Mutual Funds Account Application	
AIG SunAmerica Fund Services	Admin	Non-Erisa 403(b) Annuity Special Tax Notice	8 Page Non-E
AIG SunAmerica Fund Services	Annuities	Polaris Choice Deferred Annuity App	
AIG SunAmerica Fund Services	Admin	Polaris II 1035 Transfer Form	Non state spe
AIG SunAmerica Fund Services	Annuities	Polaris II NY F-5335NB	Individual Moc
AIG SunAmerica Fund Services	Admin	Polaris II NY Reg 60	Definition of B

Form Groups: One of the best ways to use Quik! is to setup groups of forms to make selecting forms easier. Choose from a list of groups that you established to automatically choose all of the forms required by that group. For example, you might have a group called New Account Forms that includes a new account form, an order ticket, a signature guarantee and prospectus receipt. Instead of selecting each form individually, setup a group so you only have to select the group name. You can also add or remove any forms to the group at any time.

Quik! Help

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NEW FEATURE!!! Search For Forms: Use the Keyword Search at the bottom of Quik! to find the forms you need. Enter one or more words and click the Search button or <ENTER> key on your keyboard. The search will only display the forms that match your search word(s). After you check the forms you want, you can search again and the forms you selected will remain at the top of the list. If you want to clear your search but keep your selected forms, click the Clear button. To reset your search and selected forms, click the Reset button.

Step 3 – Start Forms

When you press the Start button, Adobe® Acrobat® will start and display up to 12 forms at a time. You can now edit the forms and complete them before printing.

Adding Additional Names

Quik! now supports additional names on forms including:

- Joint / Spouse
- Contract Owner
- Annuitant (up to 4)
- Beneficiary (up to 4)

When starting forms, if you check the "Add Annuitant/Beneficiary" check box, an Additional Names screen will appear allowing you to choose a joint, owner, annuitants and beneficiaries using client data stored in your database. In other words, anyone in your database can be used as an additional name on your forms.

Step 3 - Start Forms START! Add Annuitant/Beneficiary Create Client Report			
	Step 3 - Start Forms	-	START! Add Annuitant/Beneficiary Create Client Report

Choose Annuitants	/ Beneficiaries / Others	X
Choose Additi	onal Names To Appear On Forms	
Choose any additional na pre-populate on forms. It	ames for each type of person that you would like to ems left blank will not be populated on any form.	
Joint Account Name		-
Policy/Contract Owner		•
Appuitant 1		
Annukant <u>1</u> Appuitant 2		-
Annuitant <u>2</u>		-
Annultant 3		_
Annuitant <u>4</u>		_
Beneficiary <u>1</u>		-
Beneficiary <u>2</u>		-
Beneficiary <u>3</u>		-
Beneficiary <u>4</u>	1	-
		_
	Clear <u>All</u> Click continue to launch forms. <u>Contin</u>	nue

After selecting your additional names, click the Continue button to start your forms.

NEW FEATURE !!! Combine Forms Together

If you check the "Combine Forms" checkbox located to the right of the START button, all the forms you selected will be combined together into a single Quik! Form. This allows you to put all the required forms together into a single document and only have to print one document. Also, when you change the data in a field that appears in multiple places on a form (like the client first name), the changes you make will flow through the entire document!

NOTE: The Combine Forms feature requires an active internet connection and will make a request of the Quik! server to combine the forms together and then download them to your browser. Then, once the forms are downloaded, your client data is populated onto the resulting form. Please be assured that NO client data is ever being sent to the Quik! server.



NEW FEATURE !!! Launch Forms From Web

If you check the "Launch Forms From Web" checkbox located to the right of the START button, each form you select will be launched directly from the Quik! web server. This ensures that the forms you start are always the most up-to-date versions available from Quik!.

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This feature was designed to assist users who want to install Quik! Forms Library in more than one location (e.g. on the network at the office and on a remote office or home office computer). Quik! is designed to be used on one PC or network at a time due to how the Quik! Forms are downloaded. If you were to install Quik! on a remote computer, then the second installation would not be able to download the forms reliably and it will become difficult to know which computer has the latest versions of the forms. By checking the "Launch Forms From Web" checkbox on the second installation of Quik!, your forms will always be launched directly from the web and your first install can continue to run the Update Service to download the latest forms.

NOTE: The Launch Forms feature requires an active internet connection and will make a request of the Quik! server to combine the forms together and then download them to your browser. Then, once the forms are downloaded, your client data is populated onto the resulting form. Please be assured that NO client data is ever being sent to the Quik! server.

Completing and Printing Forms

With the forms showing on the screen you will see that some data has already been pre-populated. From within Acrobat, you can now edit all of the fields, including the fields already filled from the database.

Quik! Help

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} <i>3</i> 2 2 (2) ∢ •][⊡][• # ## ## • # # • # # • 0 158% • ⊕ L D C E E • • •	
Accou Registra Informa	Jordan Weiss 666-66-6633 CA Print account name Tax ID number (if UGMA, print minor's SS #) State or Additional account name or trustee/custodian New account: Yes Account type: Individual JTWROS Community property Custodian for minor Corporation 403(E IRA Trust Business retirement plan Qualified ERISA plan Other: Note: Account type must match New Account Information form (FNIC 32)	f residency No 3)
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Mutu	Direct Participation Program Suitability Checklist (ENIC 60) attached Breakpoint Sales Letter (ENIC 61A or ENIC 61B) attached
Fund And	□ Request to Switch Investments (FNIC 2) attached	,

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If you launched multiple forms, they should also be open, but you may not immediately see them. To find your other forms, choose Window from the Acrobat menu bar and look at the bottom for additional open files.



Once you have filled out all necessary fields, the form is ready to print. Some forms have pages you may not want to print. In those cases, by selecting File, Print from the menu, you can select which pages to print from in the print dialog box.

Saving Forms

In some cases, you may wish to save forms that you completed. For example, some users prefer to email the completed forms to clients for the client to print, sign and return. To do this, you must save the form as a new file in a new location.

NOTE: Saving forms is a feature only available in the full version of Adobe Acrobat or the Adobe Acrobat Approval product. Both products are available for purchase at Adobe's website (<u>www.acrobat.com</u>) and are not products provided by Efficient Technology Inc or bundled with Quik!.

From within Adobe Acrobat, choose File > Save As. Navigate to a new folder and rename the file. CAUTION: If you keep the file name and folder location the same, you may overwrite the actual form template, causing the same data to appear every time you try to create this form.

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A saved form can be reopened later, but cannot be re-populated from Quik!. Saving a form is mostly useful for documentation purposes – it is recommended that a new form be generated from Quik! each time you need one to ensure the most up-to-date data and version of the form is used.

Online Menu Features

Quik!'s Integrated Online Menus

Quik! comes with an online menu that integrates the use of the Quik! Forms Library software with our website.

The Online menu gives you immediate and easy-to-use access to our site without requiring you to know your username, password or even the page you have to find. Simply choose an item from the menu and Quik! will automatically launch your web browser, log into <u>www.quikforms.com</u> and take you to the exact page you need to be on. See the graphic below for a list of menu items.

Quik! Forms Library - Take The Work Out Of Pap	perwork (version: 4	.2.0)					×
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Contact Change Rep Name					C -		
Account Login To QuikForms.com Step 2 - Select My Account Form Groups - Choc Renew Account New Group Account	• •	Rep Info	Active Rep N Thomas Trus	ame stman, CF	Rep Numb	er	
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AIG SunAmerica Fund Services	Retirement Planning	AIG-SA Individual 401	КАрр				
AIG SunAmerica Fund Services	Retirement Planning	AIG-SA Transfer Form-	IRAs				
AIG SunAmerica Fund Services	Retirement Planning	Application for IRAs					
AIG SunAmerica Fund Services	Annuities	Deferred Annuity Appli	cation				
AIG SunAmerica Fund Services	Mutual Funds	Mutual Funds Account	Application				
AIG SunAmerica Fund Services	Insurance	NY Polaris II Telephon	e Authorization		Telephone A	uthori:	
AIG SunAmerica Fund Services	Admin	Polaris II 1035 Transfe	r Form		Non state sp	ecific	
AIG SunAmerica Fund Services	Annuities	Polaris II NY Applicatio	n		Includes Def	inition	
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Step 3 - Start Forms 🦳 🔽 START!	Add Annuitant/B	eneficiary port				E <u>x</u> it]
Status			6/3	23/2004	8:02 P	M	

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Update Forms Now

One of several ways to update your forms, clicking Update Forms Now will launch the Quik! Update Service which will check the quikforms.com website to determine if any of your forms need to be updated.

Find More Forms

If you need to add more forms to your library, click Find More Forms to be transported to the Find Forms page on our website. From the Find Forms page you can quickly find and add more forms to your library. When you're done adding forms, don't forget to click on Save Changes and then to run your Update Service to download and install the new forms. (See "Managing Forms" section for more detailed instructions on adding forms.)

Remove Forms

To remove a form from your library, click on Remove Forms. This item will take you to the My Forms screen where you can review and remove forms you no longer wish to use. (See "Managing Forms" section for more detailed instructions on adding forms.)

Request A Form

If you need a form built that we don't currently have in our system, please send the form to us. In most cases, we will build the form for free within 10 business days, if not much sooner. To request a form, first download the form from your dealer's website and save it on your hard-drive. Second, click on Request A Form from the Online menu. (See the "Managing Forms" section for more detailed instructions on sending a form to us).

Unlock Private Forms

Quik! provides forms that are both public and private. Private forms are for dealers who do not want every advisor to access without some form of authentication. Quik! works with several companies whose forms are private. Click Unlock Private Forms to login to our website and enter a code that will give you access to the forms you want. You may need to request the code from your dealer first.

Change Rep Name

If you need to change the rep name for your copy of Quik!, simply choose the Change Rep Name item and you will be prompted to enter the new rep name on <u>www.quikforms.com</u>.

Login To QuikForms.com

If you would simply like to login to our website and do your own navigating/exploring, choose the Login option from the Online menu.

My Account

Use the My Account item to login and manage your account. The My Account section of our website allows you to manage your billing and customer information, renew your subscription, download

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software, change your website password and rep name, and subscribe to private forms. Simply click the link you wish to view.



Renew Account

When it becomes time to renew your Quik! subscription, click the Renew Account feature to automatically log into our website and renew.

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Advanced Features

NEW FEATURE !!! Connect Quik! To Multiple Databases

If your office supports multiple advisors who use different databases, Quik! can be setup to support each rep and their own database program.

Quik! supports multiple advisors on a single installation of Quik! by purchasing a Multi-Rep license (contact us for more details). Multi-Rep licenses support up to one unique database connection per license or rep. So, if one Advisor is using ACT! and another is using dbCAMS+, both advisors can use the same copy of Quik! when installed on a network and use their own database to pre-populate forms.

Setting up Multiple Database support is similar to setting up the first database. By default the primary database connection (the database you chose when you initially configured Quik!), belongs to the first advisor and any other advisors who have not connected Quik! to another database.

REQUIREMENTS

- Quik! must be installed on a network
- You must have a Multi-Rep license for at least 2 reps
- You can only have one rep using the Quik! Database or Albridge Web Services (which uses the Quik! Database)

To setup an additional database connection for an advisor, do the following:

- 1. Click the Rep Info button in Quik! Forms Library.
- 2. Navigate to the rep that you want to setup the database for by clicking the Next button.
- 3. Click the Assign Database button.

Registration				
nclude Your Rep Inforr he info you enter below may display or me. To ensure your privacy, rep names Personal Office Informatio Rep Name (click to update)	nation on Forms certain forms and can be updated can only be changed on our v n Phone Number Ext	Ated at any vebsite. Rep Numbers Enter as many rep numbers as	required. with BOLD labels are y used fields on forms. needed, but only one	
Jonathan Trustman	(626) 795-9990	rep number at a time can display on a form.		
Address Line 1	Fax Number		Add Rep Number	
501 E. Colorado Blvd, Suite 250	(626) 795-9099	12345-009	Delete Rep Number	
Address Line 2	Email Address	444 3333	20 CH2	
	jonathan@trustman.com			
Address Line 3	Rep Soc Sec Number	- Rep Database		
Pasadena CA 91 Branch Office Information - Branch Company Name	Use Personal Address Supervisor Name (OSJ)	Broker/Dealer Headquart	Assign Database ers Information —	
Trustman Investor & Services	Trustman	Trustman Investor & Services		
Address Line 1	Branch ID/Number	Address Line 1	Phone Number	
501 E. Colorado Blvd, Suite 250	92919	501 E. Colorado Blvd, Suite 250	(626) 795-9990	
Address Line 2	Phone Number	Address Line 2	Fax Number	
	(626) 795-9990		(626) 795-9099	
Address Line 3	Fax Number	Address Line 3		
	(626) 795-9099			
City State Zip Code		City State Zip Code		
			101	

4. In the Database Connection screen, choose the rep's database and browse for the database file, and click Save.

Populating Forms Using Multiple Databases

Choosing which database to use to pre-populate forms is as simple as choosing a rep name. When you are ready to start creating forms for an advisor, start by selecting the advisor from the Rep Name drop-down list located under the Quik! logo (see image below). Each time you select a rep, the database for that rep will be selected as well – the screen may take a moment to refresh.

Quik! Help

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Quik! Forms Library - Take The Work Out Of P	aperwork (version: 4.	2.0)			
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AIG SunAmerica Fund Services	Retirement Planning	AIG-SA Beneficiary Forms-IRAs			
AIG SunAmerica Fund Services	Retirement Planning	AIG-SA Individual 401k App			
AIG SunAmerica Fund Services	Retirement Planning	AIG-SA Transfer Form-IRAs			
AIG SunAmerica Fund Services	Retirement Planning	Application for IRAs			
AIG SunAmerica Fund Services	Annuities	Deferred Annuity Application			
AIG SunAmerica Fund Services	Mutual Funds	Mutual Funds Account Application			
AIG SunAmerica Fund Services	Insurance	NY Polaris II Telephone Authorization	Telephone Authori:		
AIG SunAmerica Fund Services	Admin	Polaris II 1035 Transfer Form	Non state specific		
AIG SunAmerica Fund Services	Annuities	Polaris II NY Application	Includes Definition		
AIG SunAmerica Fund Services	Admin	Polaris II NY Reg 60	Definition of Repla		
AIG SunAmerica Fund Services	Admin	Polaris Platinum II VA Tranfer Form	Non-NY Form		
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Select All Unselect All k	eyword Search (for forms) Search	<u>R</u> eset		
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By selecting a rep, which then switches databases, you can easily control which client data you are using on forms for a rep. For those reps who have not been assigned a database, the primary database will be used. For example, if rep 1 and 2 are sharing an ACT! database and rep 3 has a dbCAMS+ database, the choosing rep 1 or 2 will connect Quik! to the ACT! database, while choosing rep 3 will select the dbCAMS+ database automatically.

To Unassign A Rep Database

To remove a rep database assignment, open the Rep Info screen and click the Unassign Database button and the rep will revert back to using the primary database again.

Manage Data Fields

The "magic" of Quik! is the ability to seamlessly connect directly to your contact management database without you having to work through a tricky configuration. We accomplish this "magic" by mapping the data fields between your database and Quik! for you. However, in some cases, you may be using your database differently than the average user does or you may have defined custom fields that you would like Quik! to use. For example, not all databases have a field for social security numbers and you may have defined a custom field to capture that data. Since Quik! is not preconfigured to match your custom database configuration, you may want to modify the data map.

Quik! allows you to map the data fields to custom fields in your database. While this sounds complicated, it is actually a lot easier than you may anticipate. Simply follow these instructions to map your fields more precisely.

To Modify Your Data Map

3.

- 1. Select "Tools" from the menu bar and then click "Map Data Fields".
- 2. The Map Data Fields window will appear with two sets of data. In the box on the left is a list of fields available in Quik! (heading says "Field Description") with an associated database field assigned to it (heading says "DB Fields"). In the right list box is a list of database fields from

your database	👯 Map Data Fields					
with sample	Manage Database Fiel	ds				
data listed	Click on a form field on the left and the	en click on the correspor	ndina	Choose the Matching Database Field		
next to each	database field on the right to map the relationship. To delete a relationship,			Choose the database field on the right that best matches the field		
	double-click on the form field on the left. Save your changes when done. description on the left - database fields can be used more than once.					
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- 4. Next, select the field in the right list box that you want to map to the field from the left list box.
- 5. After selecting the field on the right, notice that the field on the left now has the name of the field on the right next to it.

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To clear a data mapping, double-click the field you wish to clear in the left-hand box.

After mapping all of your fields, be sure to click the Save button. You can also reset your data map at any time by choosing the RESET button. Or, if you want to restore the originally installed map, choose the Restore Defaults button.

Backup / Restore User Files

Quik! has made it easy for you to backup and restore your user files, especially when you are reinstalling Quik! or moving Quik! to your network. Quik! relies on several files to contain information about your Quik! configuration, including:

- Rep Information and Rep Numbers
- Form Groups and Forms
- Quik! Database Mapping File
- Quik! Forms Library Database
- Quik! User Settings

If you wish to backup and/or restore these files, choose either Backup User Files or Restore User Files from the Tools menu and Quik! will automatically backup your files. Quik! saves up to three backup copies to ensure you don't lose valuable information.



View Client Form Log

To better assist you in tracking which forms you started for which clients, Quik! now tracks which client(s) and form(s) you chose and the date in which you started the form. Each time you start a form, a record is added to the Client Form Log. The log file is automatically saved as "QuikFormsGeneratedLog.csv" in the folder where you installed Quik!.

To view this file, click View Client Form Log in the Tools menu. The file is a comma-separated file that is ideal to display in Microsoft Excel, but can also be shown in any text editor such as Notepad.

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If you wish to clean out the Client Form Log, you can either delete the file from your hard-drive and a new one will be created by Quik!, or you can open the file, delete the data and save the file.



Scheduling The Update Service

If you would like to have the Update Service run on a schedule (which is ideal for those installing Quik! on a network server) then schedule the Update Service in the Windows Scheduled Tasks on the PC or server where Quik! is installed.

To schedule the Update Service, use the Microsoft Windows Scheduled Task Wizard, as described below.

1. On the Windows Start menu, click Programs > Accessories > System Tools > Scheduled Tasks.

For Windows NT 4.0, you can access the Task Scheduler in My Computer; or on the Windows Start menu, click Programs>Administrative Tools>Scheduled Tasks). The Scheduler tasks are located in C:\WINNT\TASKS.

- 2. In the Scheduled Tasks folder, double-click the Add Scheduled Tasks icon.
- 3. Follow the instructions in the Scheduled Task Wizard.
- 4. When you are asked to click the program you want Windows to run, select "Quik! Update Service" from the Application list.
- 5. Continue following the instructions in the Scheduled Task Wizard to set the frequency and time at which you want the Update Service to start.

When you have successfully scheduled the Update Service, the Update Service icon and its schedule information are listed in the Scheduled Tasks folder.

Note: Your normal Internet access fees apply when you use Update Service. Automatic Update Service requires both Microsoft Internet Explorer 5.0 or later and Microsoft Task Scheduler installed on your computer. The Microsoft Task Scheduler requires the full (not minimum or custom) installation of Internet Explorer 5.0, including the Offline Browser Pack.

Support Resources

Quik! Help

Quik! has made it easy for you to contact customer service. From within the Quik! Forms Library, you can contact us immediately by either sending us an email and/or sending us your error log.

We recommend that you send us your error log anytime you have an error, that way we will be better able to understand the problem you are having. Plus, we'll get your message right away and respond to you immediately.

Send Errors To Support

From the Help menu, choose Send Errors To Support. Quik! will then submit your error report to our support team without you doing anything else. You'll receive a confirmation email and a response from us as soon as possible.



Send Us An Email

Quik! also offers you the ability to send us an email from our website. From the Help menu, choose Send Email To Support. Your browser will be launched and you will be logged in to our send email page. Type in a message, attach (upload) a file if you'd like and send your email to us.



NEW FEATURE !!! Search Knowledge Base

We offer an extensive Knowledge Base on our website. You can search our knowledge base for frequently asked questions, product support, installation issues, etc. Every time we learn something new based on a question from a customer, we enter it in our knowledge base so you can have immediate access to it. If you have a question, try our searching our knowledge base.



Other Help Features

We also offer an extensive online support section. Visit our online support by clicking Get Help Online from our Help menu. Or, you can email your questions to <u>help@etiforms.com</u>.

Live Help

We pride ourselves on our ability to service our customer's needs. If you need help and can't figure out the solution on your own, don't wait another second – give us a call.

We understand that your first job is to service your customers, not technology, so rely on us to be your technology expert when it comes to setting up and using Quik!. Feel free to contact us via email or phone, and we will do everything we can to solve your problem within 24 hours, if not within the same hour.

Contact Information

Phone: (909) 624-7988 Email: <u>support@etiforms.com</u>

Web: <u>www.etiforms.com/support.aspx</u>

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