



**Installation Guide For:**

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# **Quik! Forms Library Version 5.1**

For further support, please visit us on the web at:  
[www.quikforms.com](http://www.quikforms.com)

### Installation Guide

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## 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, Millenium Edition, 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 ([www.acrobat.com](http://www.acrobat.com)).


## 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 [www.quikforms.com](http://www.quikforms.com) and click the Download Software link on the home page. Or, click on the My Account button  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  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.

### Installing On A Network – [CLICK HERE FOR AN ONLINE TUTORIAL](#)

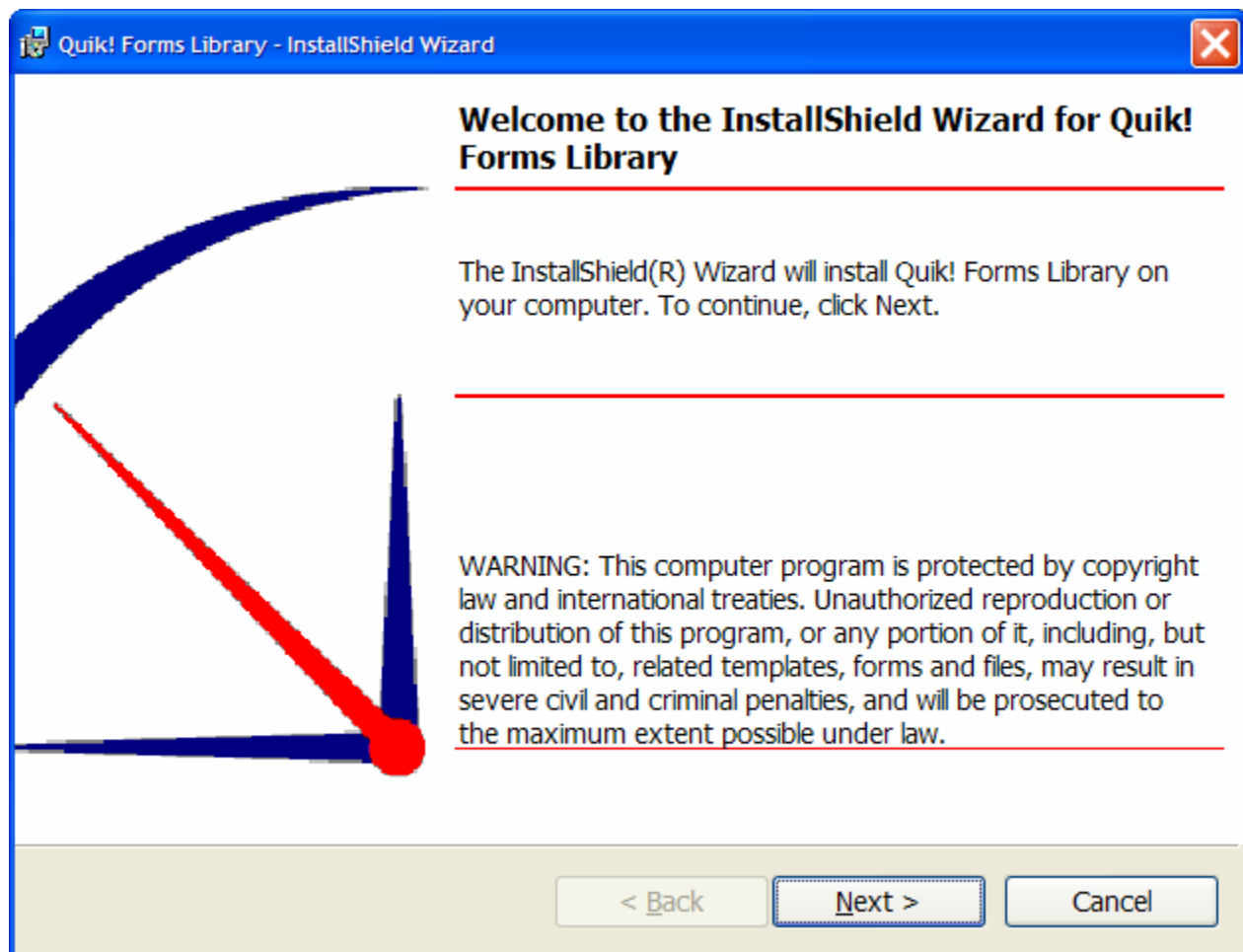
The power of Quik! Forms Library is enhanced when you share the single program amongst all of your staff in your office. Install Quik! on your network server to share the same forms, groups and rep information, plus you'll only have to get updates for one set of forms. The program will only take a few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

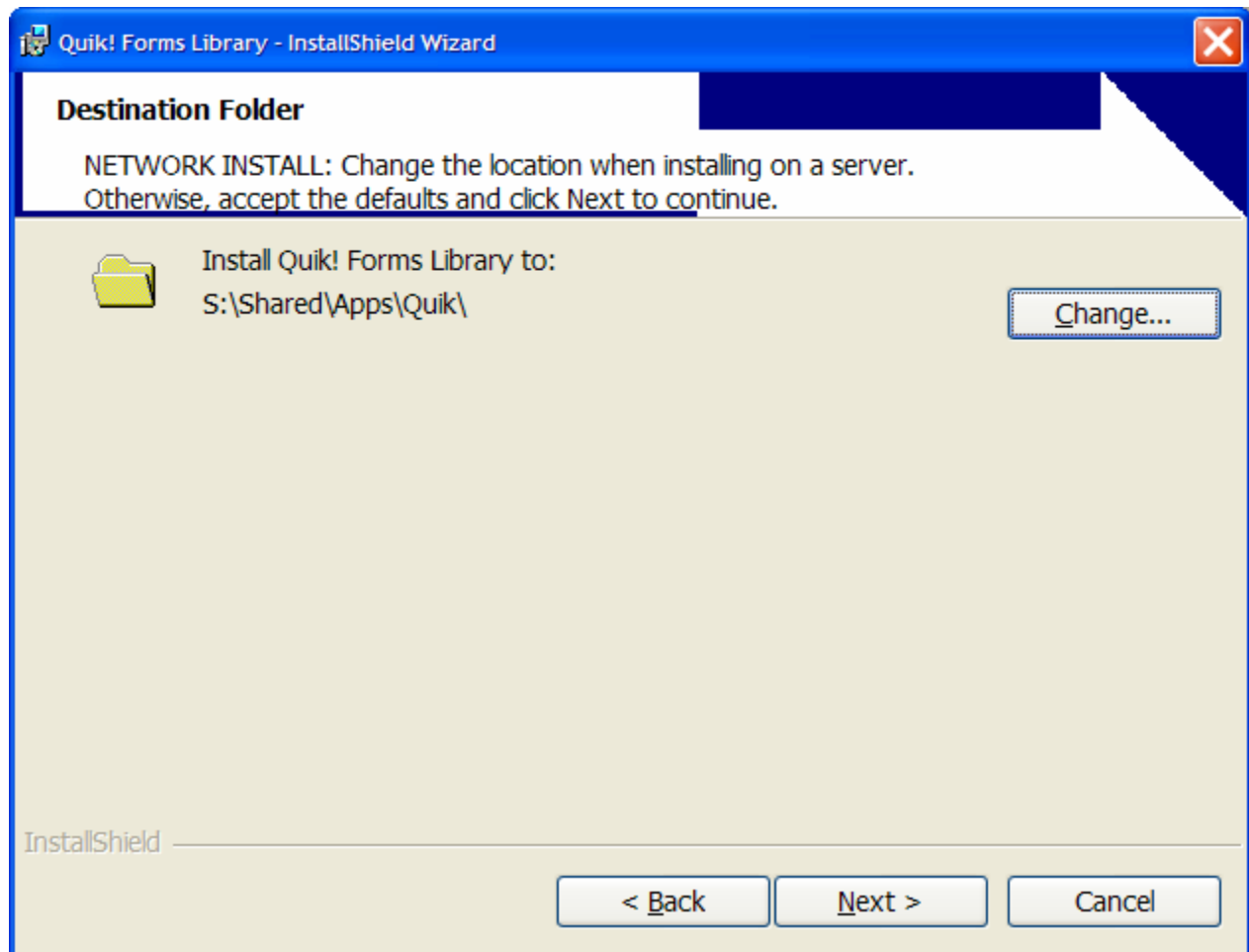
1. Go to the actual server machine – ask your administrator to help you
2. Login to the server with ADMINISTRATOR rights
3. Locate the quiksetup.exe file you downloaded
4. Double-click the quiksetup.exe file to begin the installation program.

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



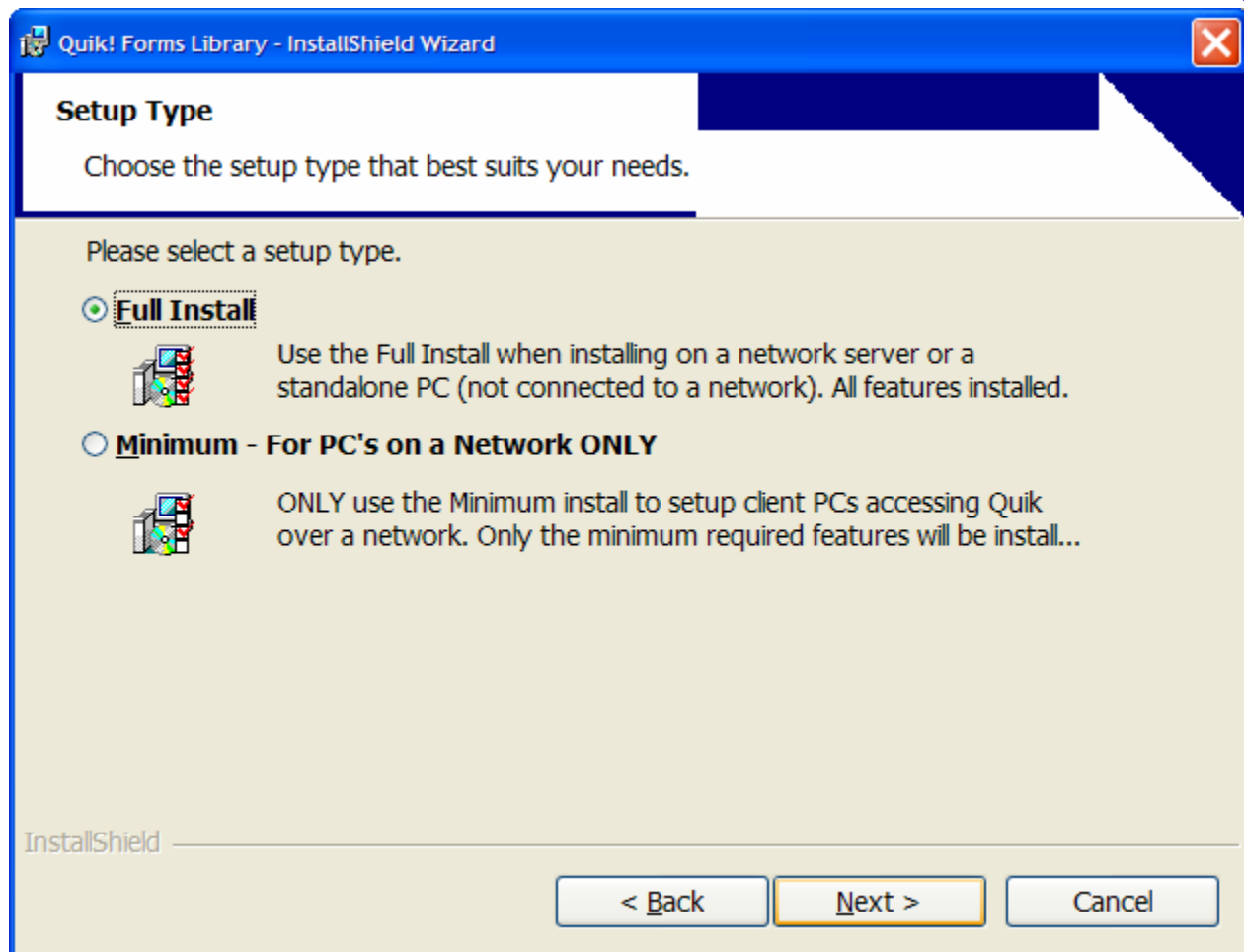
Click NEXT to continue through this screen. Continue clicking next until you get to the screen that asks for a Destination Folder (see image below).

**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.

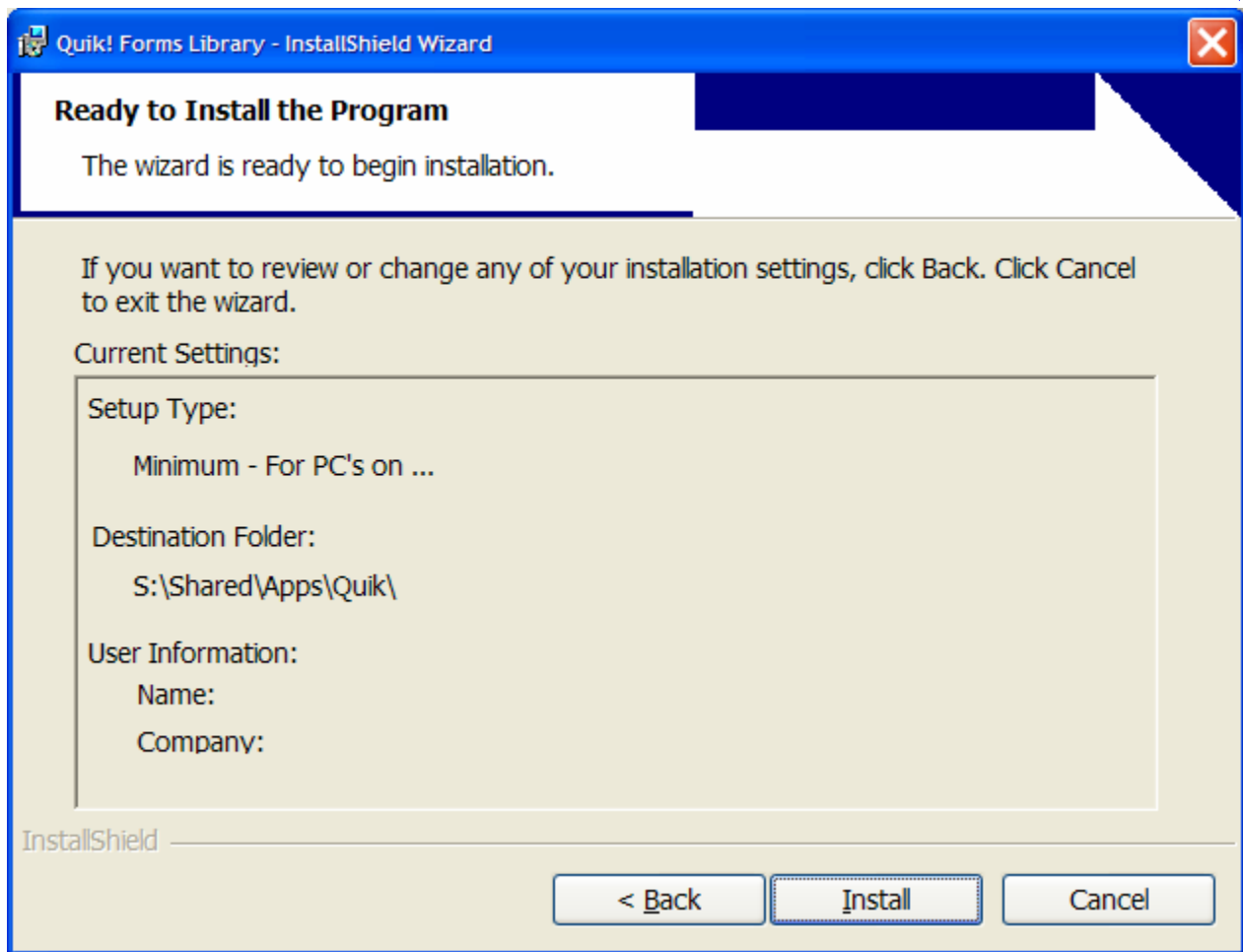


**Click the Change button** to choose a location on your server's hard-drives where network users can access the program. Most system administrators setup the server with one or more shared folders for applications and/or data – after locating a shared folder, create a folder in there for Quik (perhaps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



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.



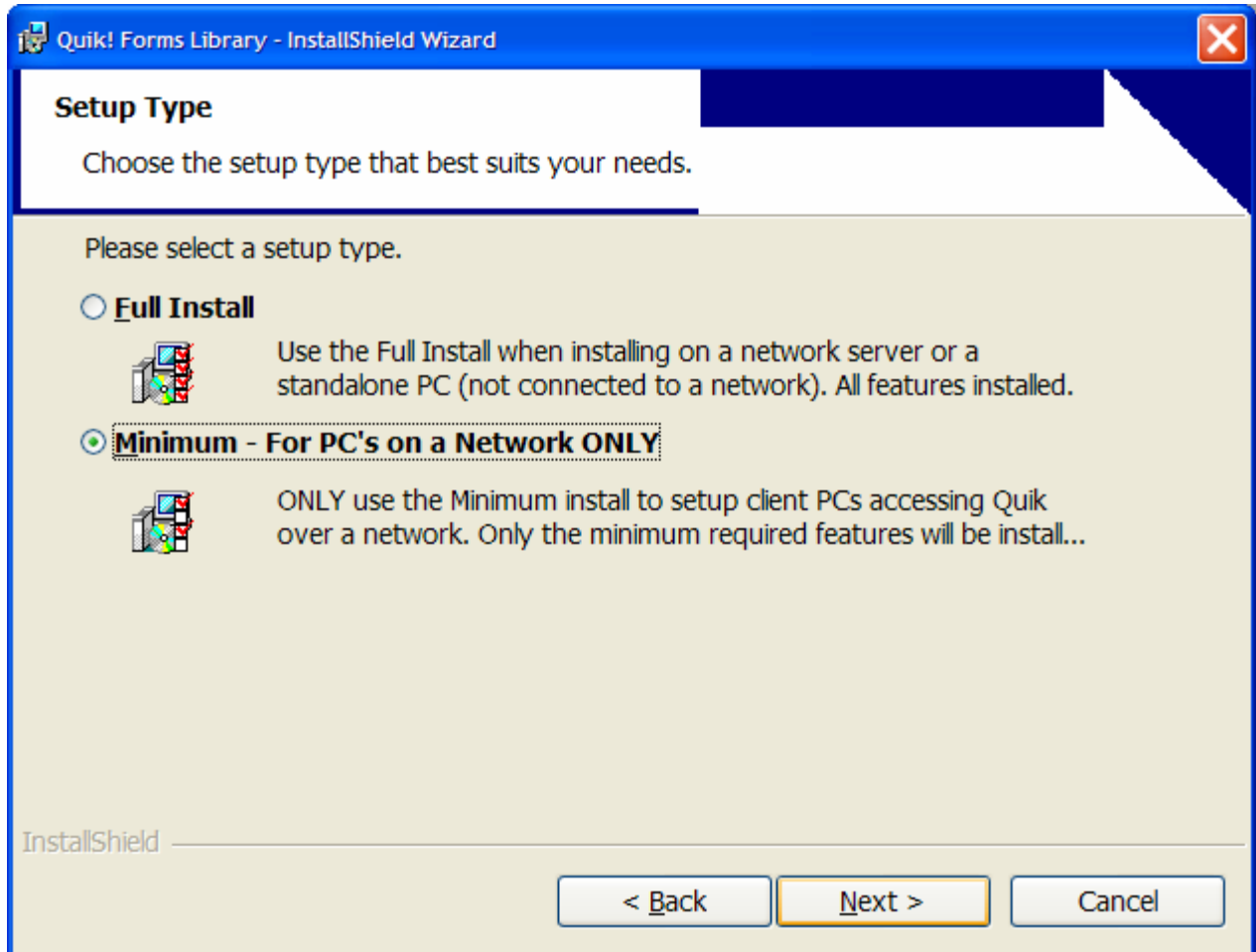
Once installed, the program will create a shortcut on both your desktop and in your START > PROGRAMS > QUIK menu.

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").

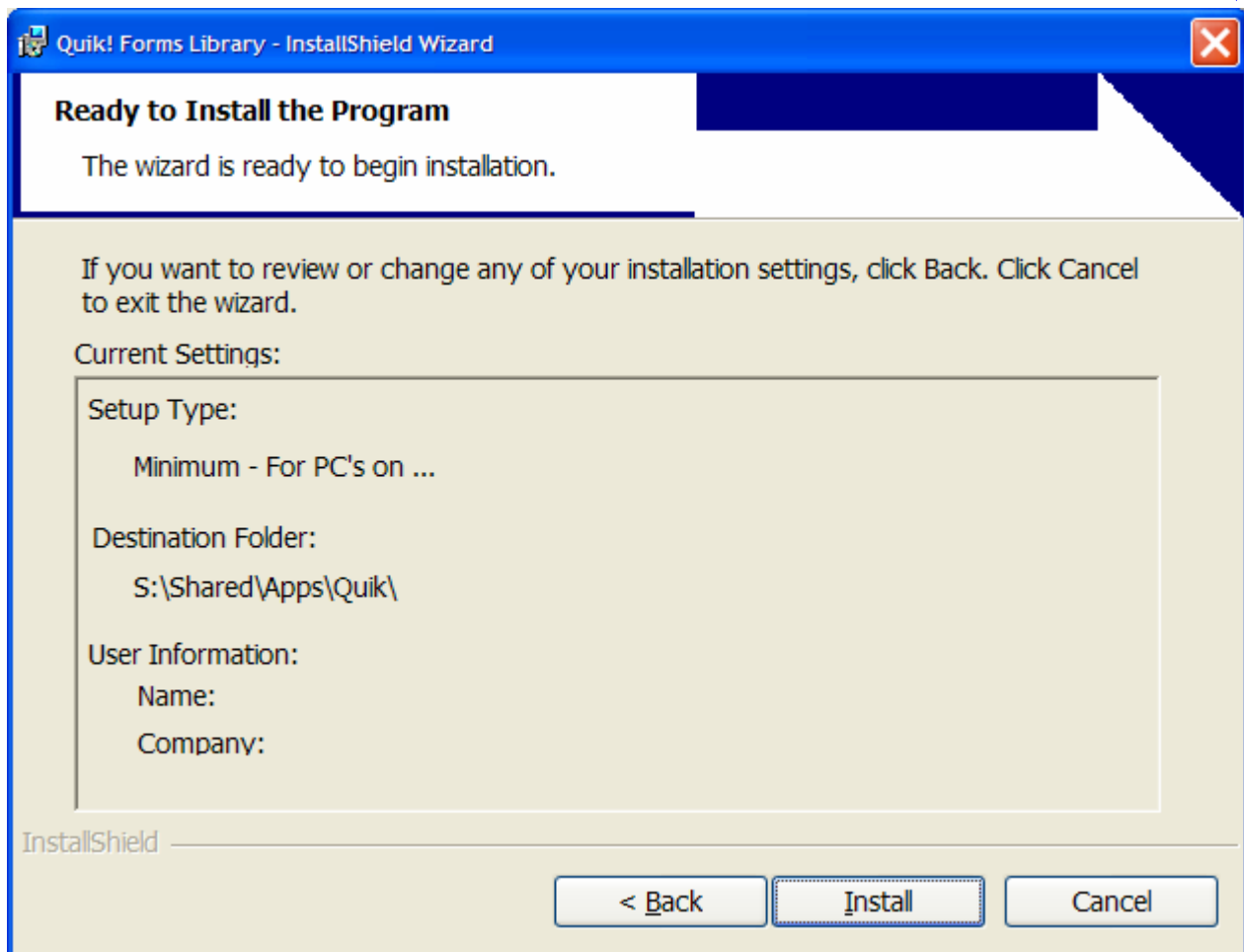
### How To Setup Network PCs To Access Quik! On The Network

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".



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



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.).

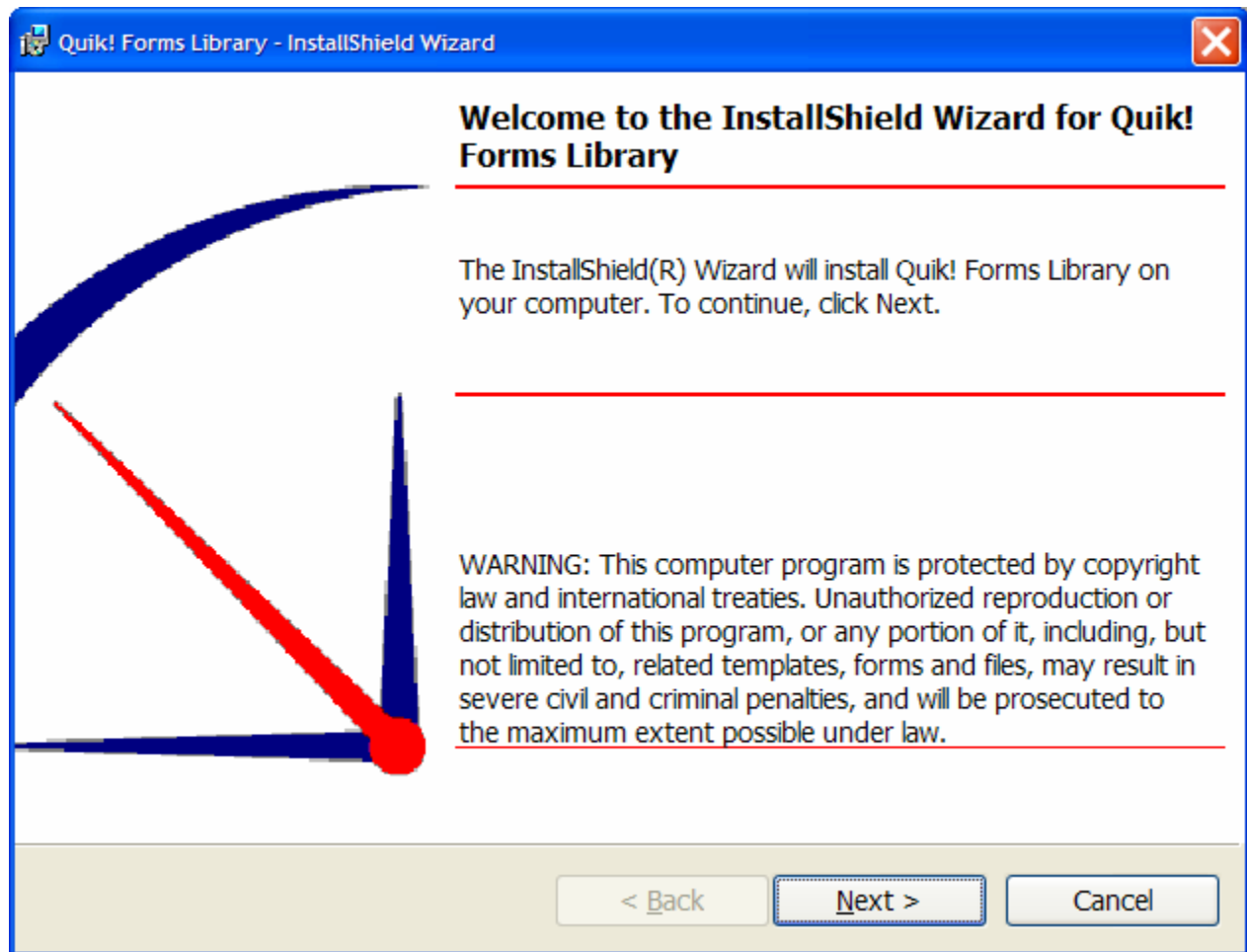
6. After completing the first PC install, run the Quik! Forms Library application on the PC you just installed it on. You will be prompted to follow the Quik! setup wizard once again to connect Quik! to your database – you will only have to do this the first time Quik! is run from a PC (see "Setting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



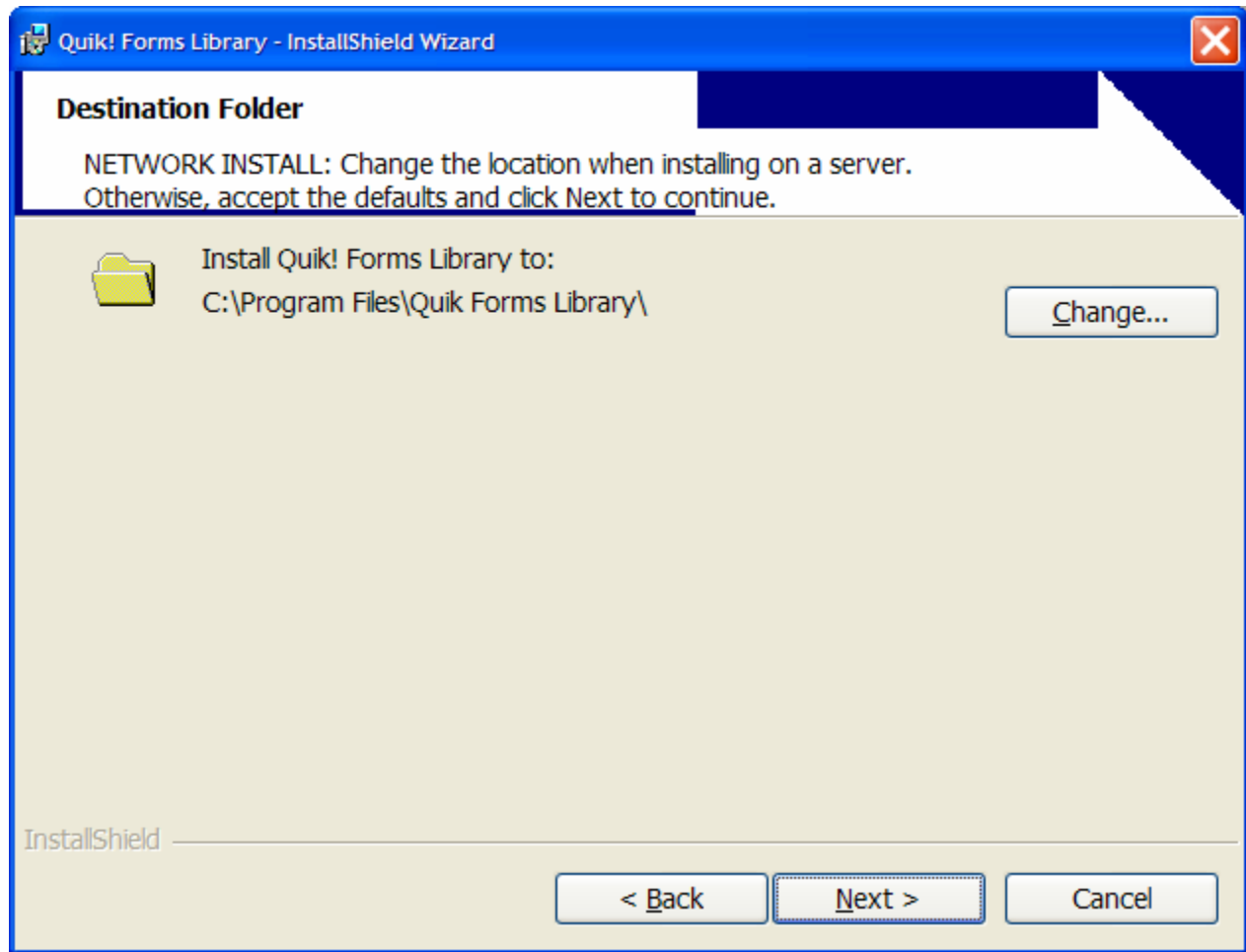
**NOTE:** If Quik! says that the license has expired on the PC you just installed on, simply run the Update Service from that PC. To run the Update Service, click the Get Updates button in the upper right corner, below the Quik! logo.

### Installing On A Stand-Alone PC

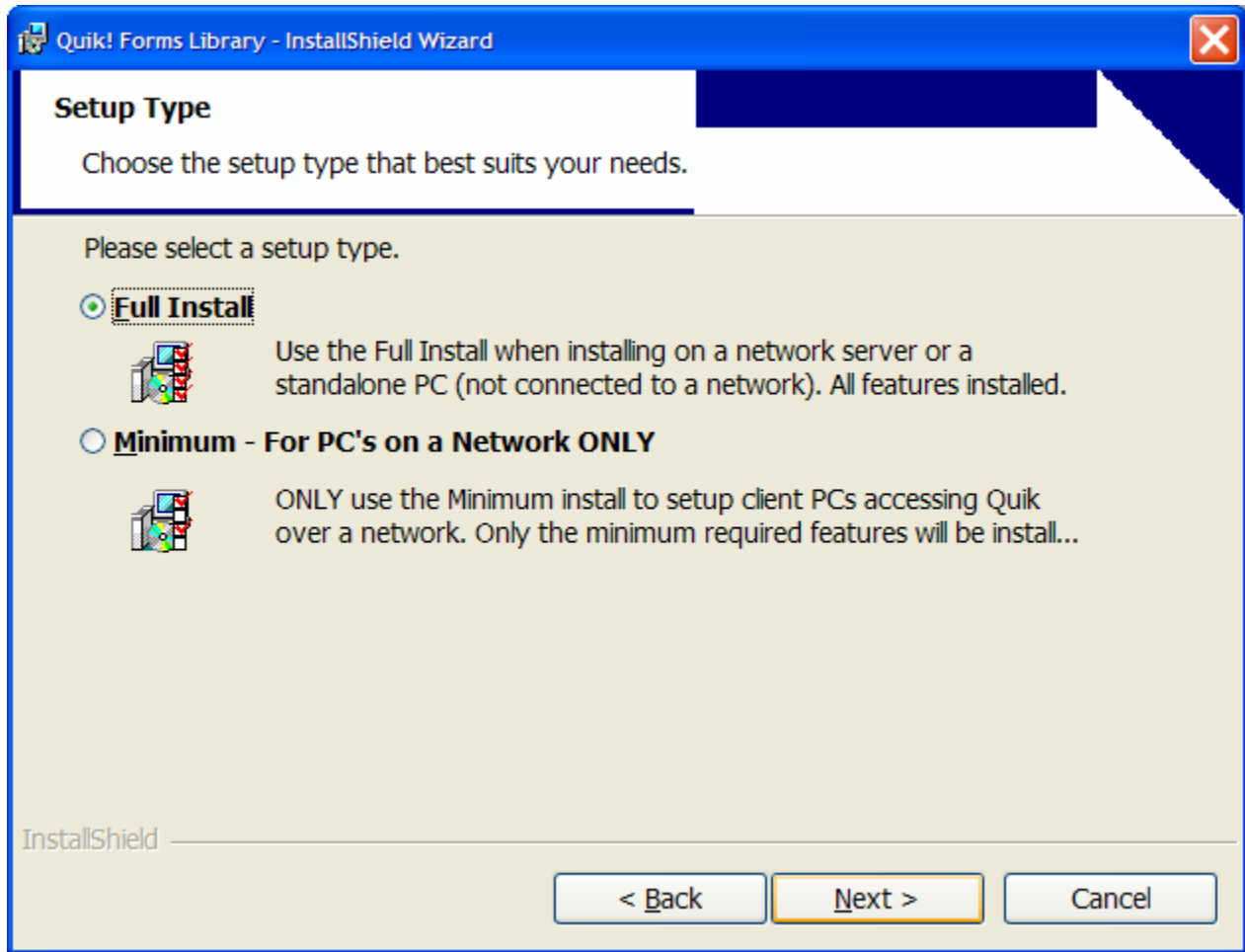
To install Quik!, double-click the installation file that you downloaded (quiksetup.exe). The program will only take a few moments to install.



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



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.



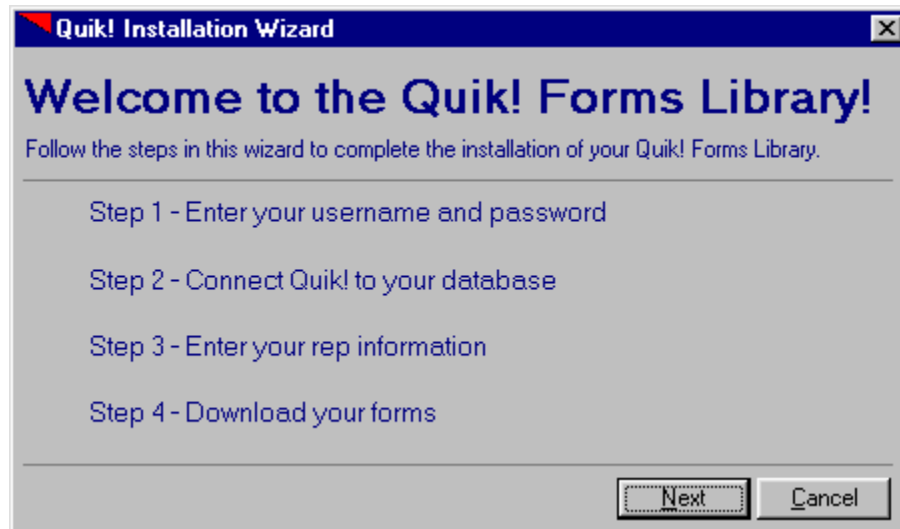
Once installed, the program will create a shortcut on both your desktop and in your START > PROGRAMS > QUIKFORMS menu.

*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.*

## 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: 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 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).*

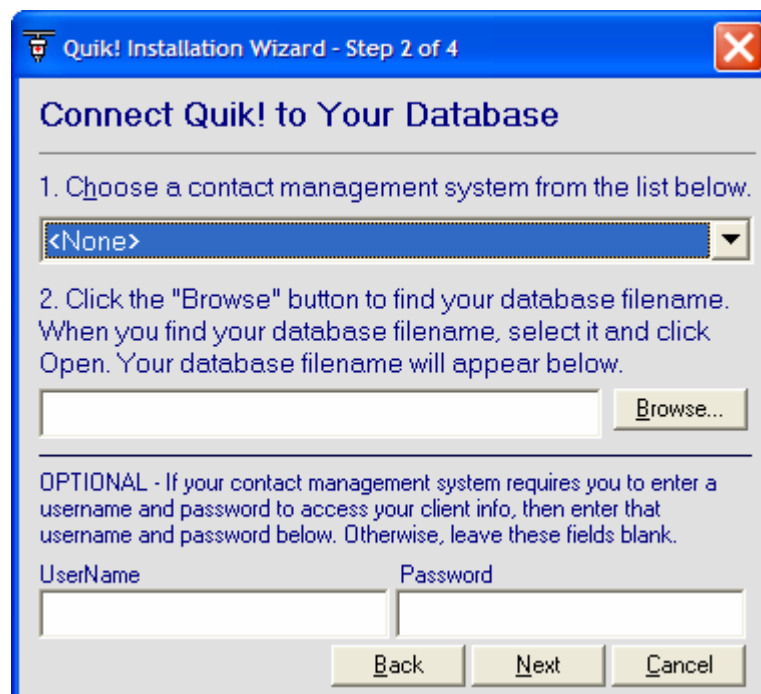
#### 1. Select Your Database

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.



#### 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.

**Quik! Installation Wizard - Step 3 of 4**

**Include Your Rep Information on Forms**  
The info you enter below may display on certain forms and can be updated at any time. To ensure your privacy, rep names can only be changed on our website.

**Items in RED are required.**  
**NOTE: The fields with BOLD labels are the most commonly used fields on forms.**

**Personal Office Information**

**Rep Name (will download later)** Phone Number Ext  
Thomas Trustman, CFP (626) 795-9990

Address Line 1 **Fax Number**  
501 E. Colorado Blvd, Suite 250 (626) 795-9099

Address Line 2 Email Address  
tom@trustman.com

Address Line 3 Rep Soc Sec Number

City State Zip Code Date of Birth  
Pasadena CA 91101

**Rep Numbers**

Enter as many rep numbers as needed, but only one rep number at a time can display on a form.

12345  
98001  
98001 / JK7  
JK7

Add Rep Number  
Delete Rep Number

**Branch Office Information** Use Personal Address

**Branch Company Name** Supervisor Name (OSJ)  
Trustman Investor & Services Trustman

Address Line 1 Branch ID/Number  
501 E. Colorado Blvd, Suite 250 91092

Address Line 2 Phone Number  
(626) 795-9990

Address Line 3 Fax Number  
(626) 795-9099

City State Zip Code  
Pasadena CA 91101

**Broker/Dealer Headquarters Information** Use Branch Address

**Broker/Dealer or Company Name**  
Trustman Investor & Services

Address Line 1 Phone Number  
501 E. Colorado Blvd, Suite 250 (626) 795-9990

Address Line 2 Fax Number  
(626) 795-9099

Address Line 3

City State Zip Code  
Pasadena CA 91101

Undo Back Next Cancel

## 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.

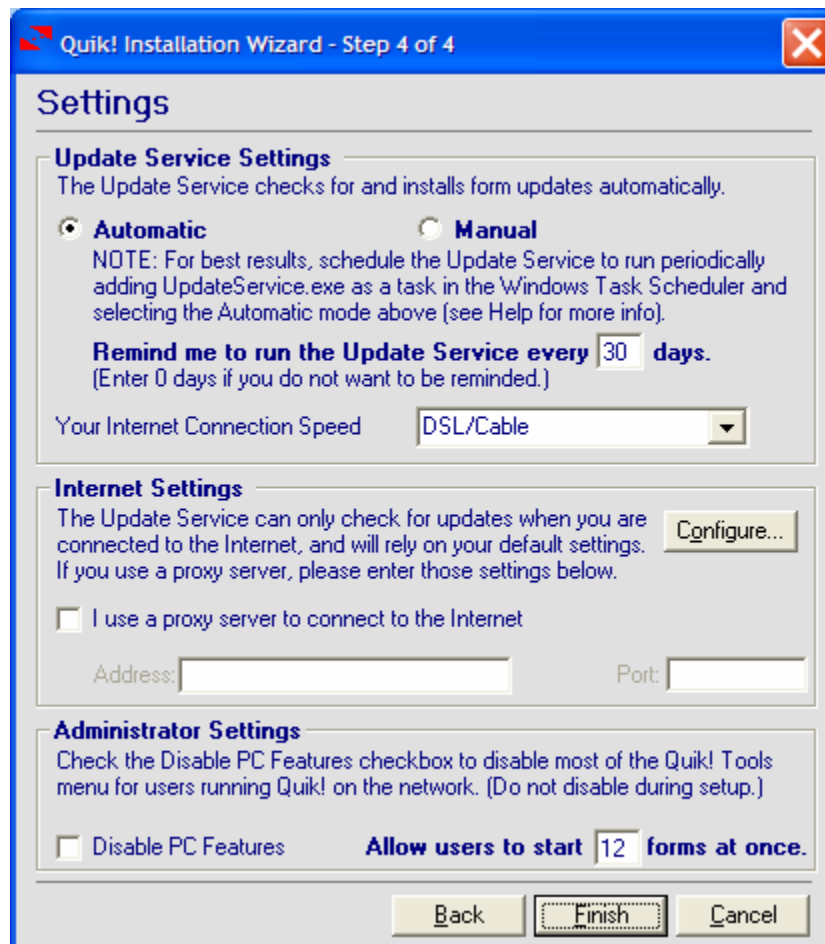
### Update Service Settings

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).



*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).*

## NEW FEATURE !!! 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.

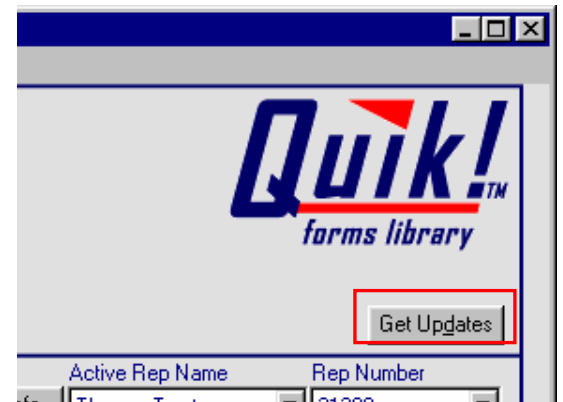
## Installing Forms

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.

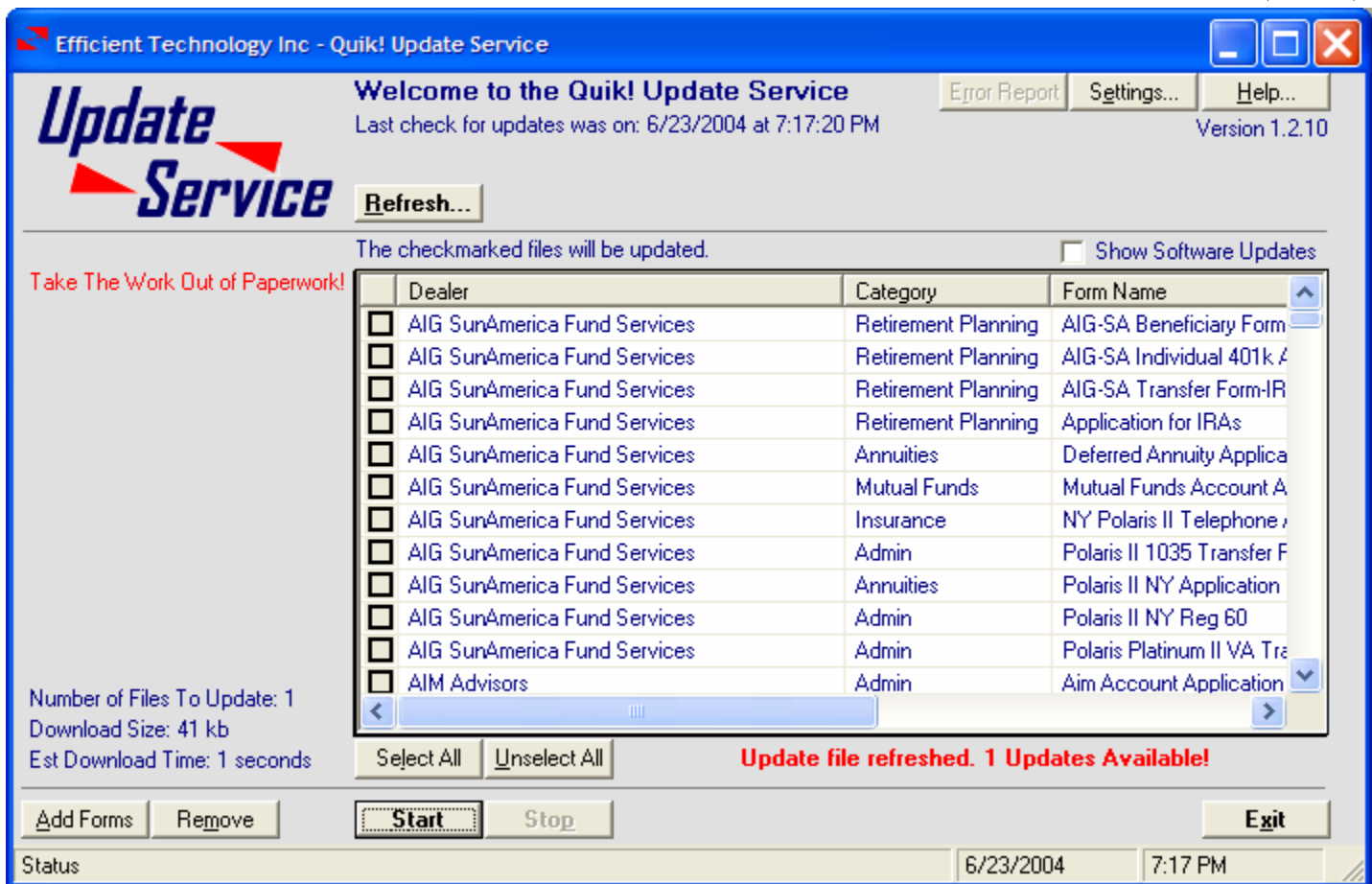
The service can be run in Automatic mode (recommended) or in Manual mode (you can change your mode by navigating to "Settings" and choosing "Update Service Settings..." in the menu bar).



## Modes

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.



**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 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 [www.adobe.com](http://www.adobe.com) or by visiting our alliances web page and clicking on the link to the Adobe Reader there (<http://www.etiforms.com/alliances.aspx>). 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.

## Support Resources

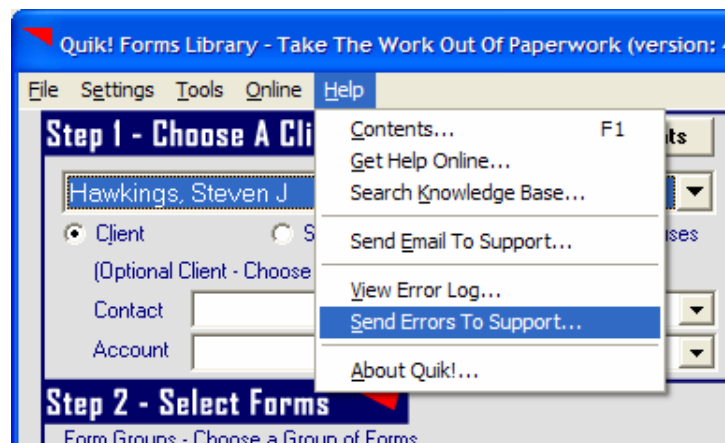
### Quik! Help

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.

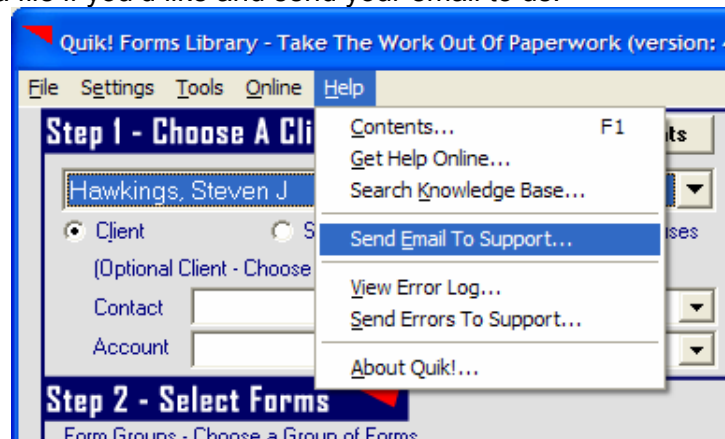
### Send Errors To Support

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.



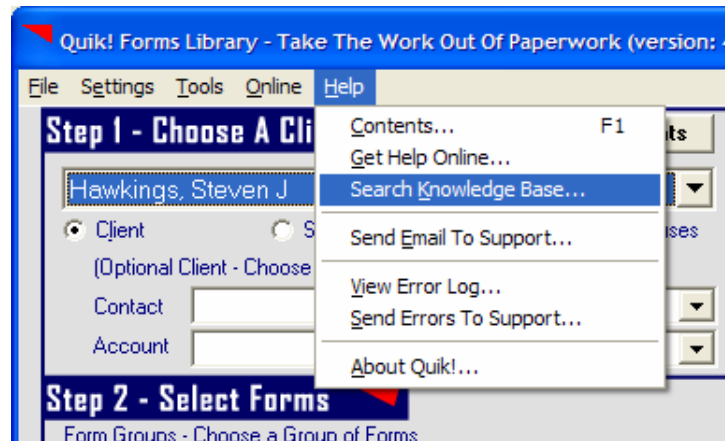
### Send Us An Email

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 [help@etiforms.com](mailto:help@etiforms.com).

### 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: (310) 356-6147

Email: [support@etiforms.com](mailto:support@etiforms.com)

Web: [www.etiforms.com/support.aspx](http://www.etiforms.com/support.aspx)