Quixer

Troubleshooting Guide

Contents

I don't see the QuiKer tab in my Microsoft Outlook ribbon

➢ When the plug-in loads correctly, a QuiKer tab should appear in the Outlook ribbon. If the Tab does not appear, simply follow these steps: Click on File > Options > Add-Ins > Go Next to "COM Add-Ins" > Check off QuiKer Add-In >OK.

➢ View the tutorial video for this here: https://simplyquiker.com/knowledgebase

Microsoft Outlook disables the QuiKer Add-In

Follow this two-step process to enable:

➢ Click on File > Options > Add-Ins > Manage > Select "Disabled Items" > Click "Go" > Select QuiKer Add-In > Select Enable > OK.

➢ Go to File > Select "Manage COM Add-ins" > Highlight "QuiKer Add-in" and Select "Enable".

QuiKer disappeared from the Outlook ribbon

If the user is experiencing an issue where the Create Email Activity button or Create Email Activity Only button has disappeared, reset the ribbon. You can navigate through this by:

➢ Right Clicking on the Ribbon > Customize Ribbon > Reset Dropdown List > Reset All Customizations.

➢ Close out of the Outlook Options window, right-click and select Customize the Ribbon. Click on the "+" on the QuiKer tab then drag and drop the inner QuiKer tab into the Home tab.

A customer is not showing up in Search

➢ Make sure the customer name is spelled correctly. Search by last name, then first name.

➢ AMS360 does not recognize '+' signs. If Users search for a client where there is a + sign, it may not show. Users need to search for a portion of the customer name that does not contain the + sign. For example, when searching 'A+ Kids Tutoring Center' nothing populates. But you can search 'Kids Tutoring Center', and it will populate.

➢ When adding a new Client to AMS, you need to re-sync QuiKer's cache to display all new entries. Users can add a "Sync Cache" button to their Outlook Ribbon by navigation to the QuiKer Options button > General > place a check next to: "Place a button on the ribbon to sync manually as needed".

➢ Alternatively, Users can close, then re-open Outlook to sync.

I need to set up a <u>New</u> Employee on a <u>Former</u> Employee's Computer (Assuming the Former Employee's Computer had QuiKer installed)

1. First, close Outlook. Then go into the AMS360 Administration Tab > Web Services API and **delete** the Former Employee's WSAPI credentials.

2. Next, setup the WSAPI for the new Employee. Instructions to do this are located in the Administrator Instruction Manual.

3. Re-open Outlook. The QuiKer Initial Setup dialog box should appear. If it appears, enter in the Agency #, API Username and API Password of the new employee.

4. If the QuiKer Initial Setup dialog box does not appear, you will need to uninstall and reinstall QuiKer in order to enter the new Employee's WSAPI credentials in Microsoft Outlook.

Uninstalling and Reinstalling QuiKer on a Computer

➢ To completely uninstall QuiKer from a computer, go to:
Start button on the computer > Control Panel > Programs and Features > Right-click on QuiKer AddIn > Select Uninstall.

➢ To reinstall QuiKer on a computer:

- Close Microsoft Outlook
- Visit: https://simplyquiker.com/installation
- Open Microsoft Outlook
- From the QuiKer Tab in the Microsoft Outlook Ribbon, select "Activate QuiKer"
- Copy and Paste the Trial Activation Key or permanent Agency License Key in the QuiKer-License Activation Form
- Click "Activate"

➢ Please note that some computers need to be re-started between the uninstall and reinstall process.

QuiKer is not populating all Customers or Document Types from the AMS360 database

When AMS updated its legacy system API, not all Customers or Document Types were migrated properly into the new AMS interface. To update the Customer or Document Types to appear in QuiKer:

To resolve the Customer Issue:

➢ Have the User go into AMS360 and locate the customer who is populating in QuiKer
➢ Have the User navigate into the "Customer Overview" section
➢ Have the User click "Edit Customer", then re-type in the customer name to exactly what it is now, and click Save
➢ Now close and re-open Outlook so QuiKer is able to cache
➢ Create an Activity to check that Customer appears in QuiKer

To Resolve the Document Types Issue:

➢ Have the User go into AMS360 and navigate here: Administration > List Setup (left menu) > Document Types
➢ Have the User click "Edit" in the top-right of the Document Types box
➢ Click on the Document Type that is not appearing in QuiKer
➢ Once in a specific Document Type, there is an "Active" checkbox
➢ Have the User uncheck then re-check the "Active" checkbox
➢ Click Save and close
➢ Close, then re-open Outlook
➢ Create an Email Activity and search for this Document Type from the drop-down

I receive an error message that the Customer.dat file is missing, or could not find the employees specified in the Settings file.
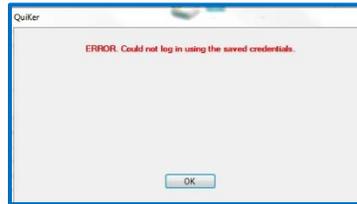
Please note that this is not necessarily a QuiKer issue. This issue can be caused by several factors: electrical disturbance, internal internet traffic interruption, or when AMS 360 is experiencing connectivity issues or API disruption. It is imperative the Employee credentials match their login to AMS. After you have checked that Employee credentials were input correctly into the QuiKer registration, proceed with the following troubleshooting activities.

First, check your network connectivity:

- ➢ Go to the Start button
- ➢ Select Control Panel
- ➢ Go to "Network and Sharing Center"
- ➢ Select "Change Adapter Settings" from the menu on the left
- ➢ Check to see that network connection is active

To reconnect the QuiKer plug-in:

- ➢ Make sure the QuiKer plug-in is enabled. In Outlook, click on File > Options > Add-Ins > Go Next to "Disabled Items" > Select QuiKer Add-In > Enable > OK. If this does not work, please uninstall and reinstall the QuiKer application.

Connectivity Error Message

If a User is receiving a Connectivity Error Message every time a User tries to create a Suspense, the AMS360 Administrator will need to visit the Web Services API, navigate to the particular User and make sure the **"Check All"** button is selected in the Entity Access section.

A User is receiving a "Manifest" error while running on Outlook 2010

  ➢ The User will need to download [Visual Studio 2010 Tools for Office Runtime](#).

Contact

Please email helpdesk@simplyquiker.com or give us a call at 1-800-521-9667 with any issues or questions.