

Q u i  e r

User Guide

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Introduction

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

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

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

1. Emails and attachments are automatically included in the Outlook Activity creation screen; there is no longer a need to drag-and-drop items into AMS360.
2. The login credentials persist after the initial installation, so Users do not need to log in every time, or be signed in to AMS 360.
3. Customer searches are faster and more thorough than searches performed inside of the AMS360 platform.

QuiKer mirrors the rich behaviors of AMS 360 with the following upgrades:

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

Local Drive Installation Instructions

Step 1

Close Microsoft Outlook. Visit <https://simplyquiker.com/trial> to download the QuiKer Program.

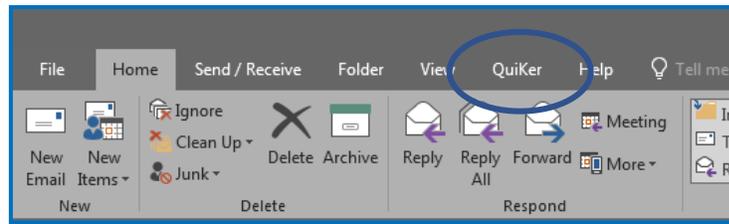
Run the QuiKer plug-in installer program and follow the on-screen instructions. The program must be executed with the same Windows account that will be using the plug-in.

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



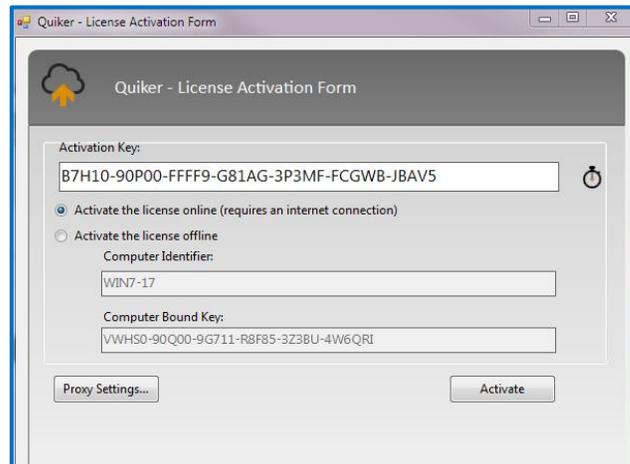
Step 2

Open Outlook and navigate to the QuiKer Tab in the Outlook Ribbon.

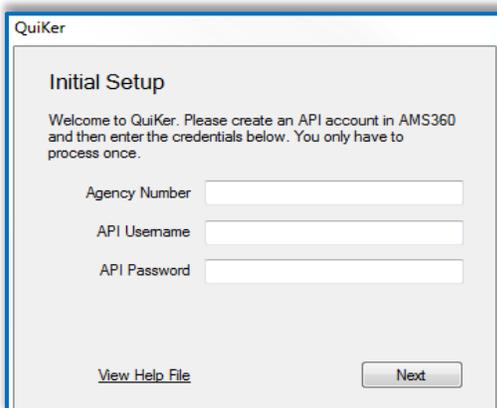


Inside the QuiKer Tab, click the “Activate QuiKer” button in the Ribbon.

Enter in the 14-Day Trial Key and click “Activate”, then “Close.”



Step 3



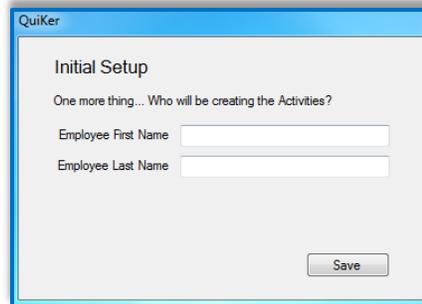
After the installation wizard is completed, please open Microsoft Outlook. A popup window asking for the Agency Number will appear.

Enter the Agency Number and the Username and Password created by your AMS 360 Administrator during the installation process.



Step 4

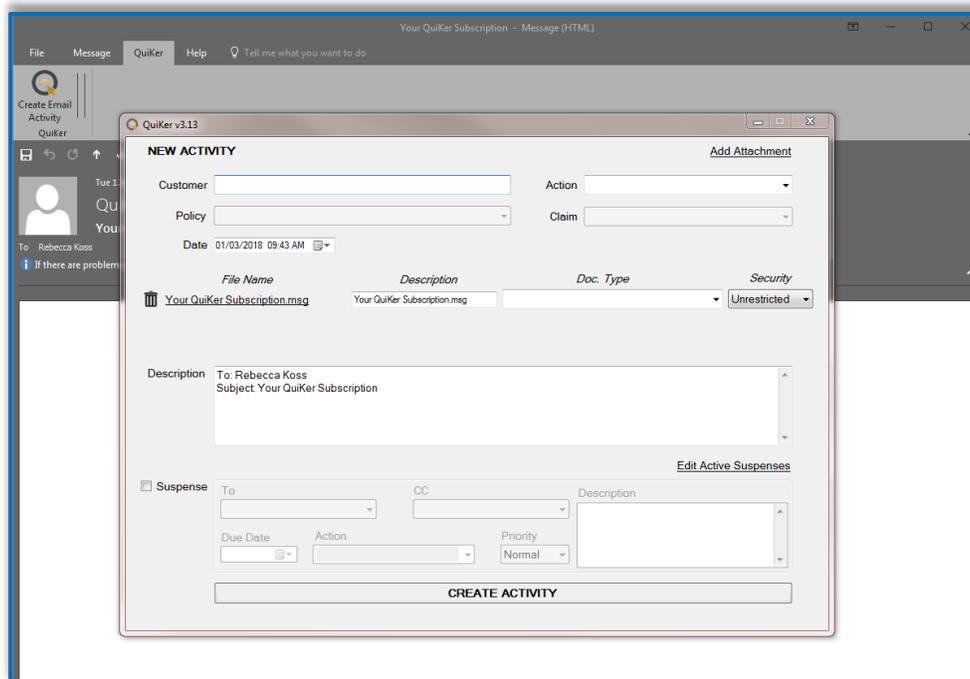
The last step is to enter your First Name and Last Name. **This name must match exactly with your Employee Name in AMS 360.** An error message will display when after clicking Save if names do not match.



The image shows a dialog box titled "QuiKer" with the heading "Initial Setup". Below the heading, it says "One more thing... Who will be creating the Activities?". There are two text input fields: "Employee First Name" and "Employee Last Name". At the bottom right of the dialog box is a "Save" button.

How to Create Activities

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



The image shows a screenshot of the Outlook interface. The "QuiKer" tab is active in the ribbon. A "NEW ACTIVITY" dialog box is open, showing fields for "Customer", "Policy", "Date", "Action", "Claim", "File Name", "Description", "Doc. Type", "Security", and "Suspense". The "Description" field contains the text "To: Rebecca Koss" and "Subject: Your QuiKer Subscription". The "Doc. Type" is set to "Your QuiKer Subscription.msg" and "Security" is set to "Unrestricted". There is a "CREATE ACTIVITY" button at the bottom of the dialog box.

Start by typing the Customer Name and selecting them from the Customer drop-down. Select the applicable Policy or Submission. Both the message (.msg File) and attachments are automatically applied to the Activity. Select the appropriate Document Type for the attachment. Users can also

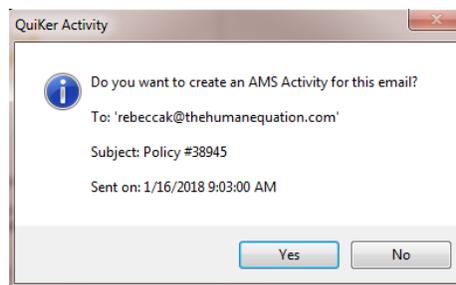


set a Document's Security Level using the "Security" drop-down menu. The Security classifications mirror the five preset security classifications in AMS360, and also include any additional custom security classifications set by the Agency.

How to Edit, Complete or Create a Suspense

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

The second way to create an AMS Activity is to Send an email. QuiKer will automatically detect when an email is successfully sent, and prompt the User to create an Activity.



Select "Yes" and follow complete the above AMS Activity screen within Outlook.

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

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

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

Select "Create an Activity Only" from the QuiKer tab:

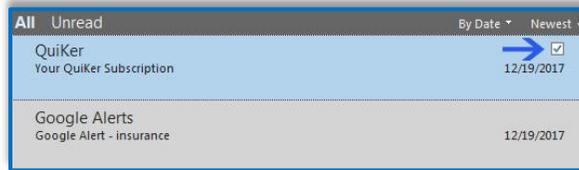


If needed, the User can add attachments or emails to the Activity using QuiKer's drag-and-drop feature.



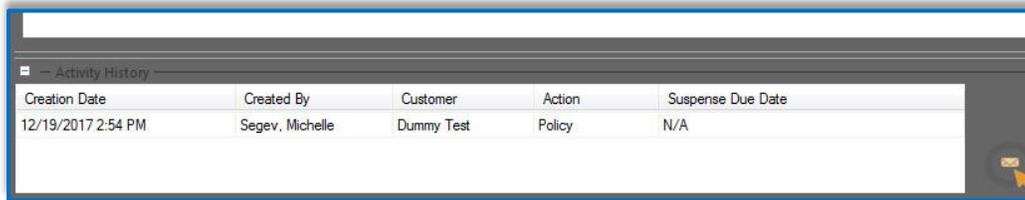
QuiKer's Audit Feature

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



QuiKer's Activity History Feature

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

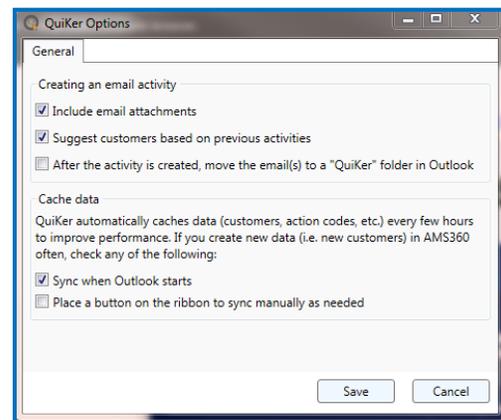


How to Manage Options

General Options

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

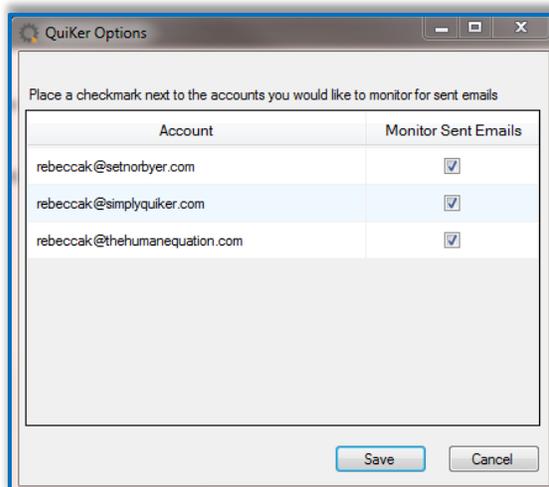
1. “**Include Email Attachments**” option: Users can choose if they want attachments extracted or not extracted from the email. *Note: If a User chooses to not extract attachment, they will remain embedded in the original email within the Activity.
2. “**Suggest Customers based on previous Activities**”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



Monitored Accounts

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

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



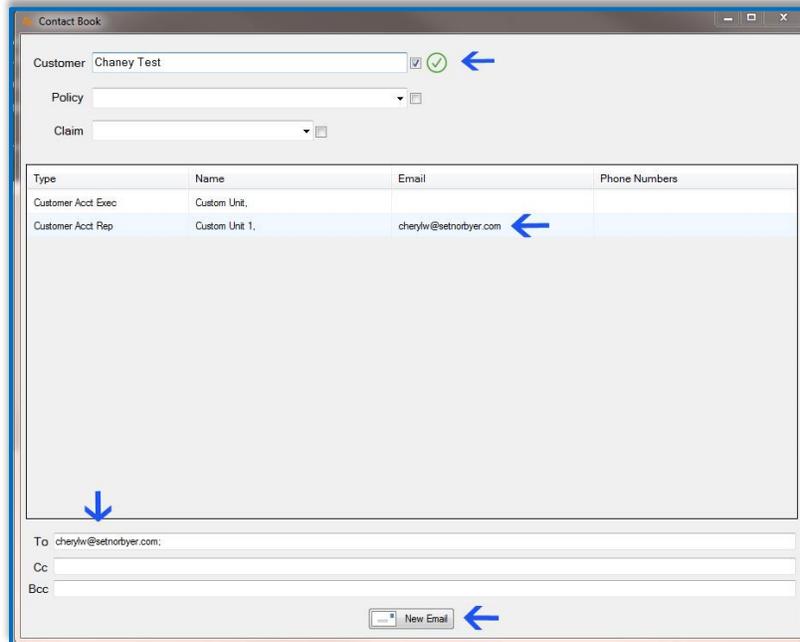
Users can uncheck any mailbox they do not want QuiKer to monitor. Save all changes.



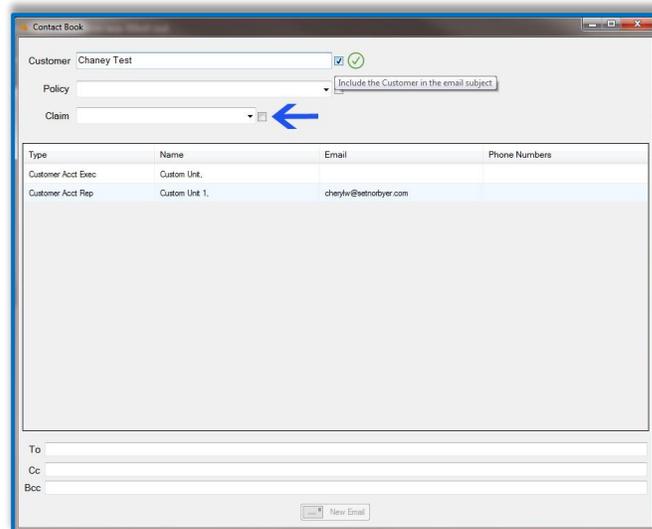
How to Use QuiKer Contact Book

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

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



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



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

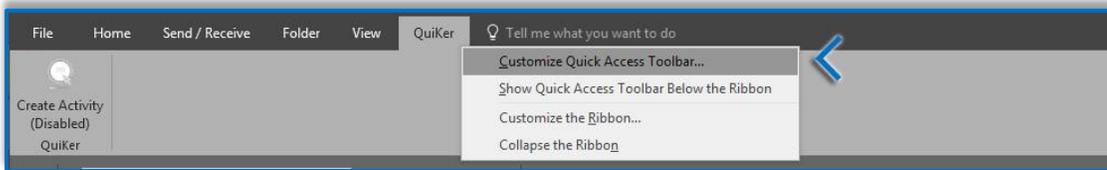


Important Information

- QuiKer only monitors the Sent folder when sending an email. If you change the default Sent folder through the Options Menu within the open email, QuiKer will not trigger. To avoid this disruption, do not change the default Sent folder. Simply CC yourself, and once the email is received, drag the email to the desired folder.
- Allow Microsoft Outlook's cache to fully update when first opening the program in the morning before using QuiKer. This process only takes approximately 15 seconds.
- Since Outlook has a habit of disabling third party Add-ins within the Ribbon, add QuiKer to your Quick Access Toolbar in both the **Microsoft Office Home Tab** AND within an **Open Email Dialog Box** to easily access the “Create Email Activity” button.

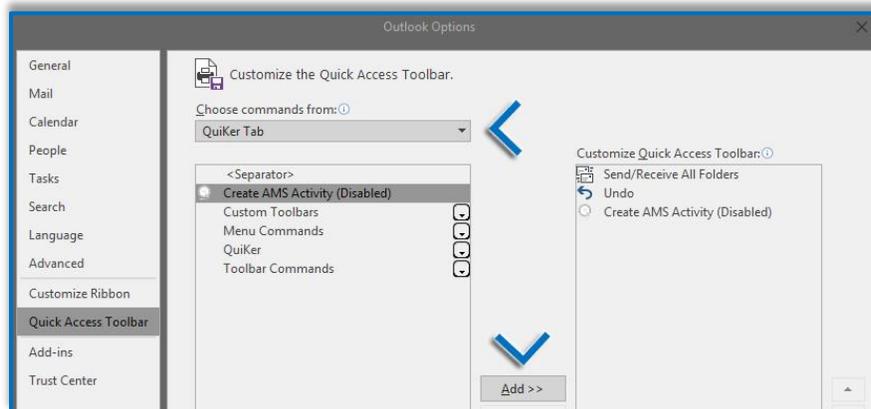
Simply follow these steps in **BOTH** locations:

Right click on the QuiKer tab and select “Customize Quick Access Toolbar”.



In the “Choose Commands From:” dropdown at the top of the screen, select “QuiKer tab”.

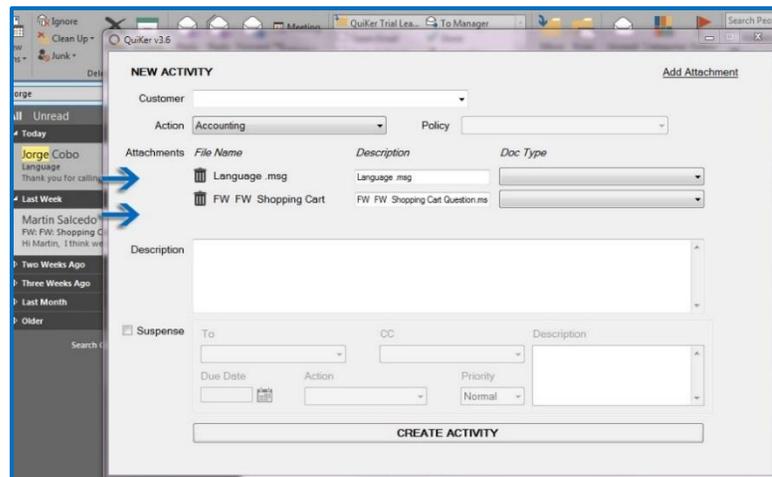
- Highlight “Create AMS Activity”
- Click “Add”
- Click “OK”.



- Once you have added QuiKer to your Quick Access Toolbar, you can customize where you would like this Toolbar displayed. Simply right-click on the QuiKer icon in the Toolbar and select “Show Quick Access Toolbar Above the Ribbon” or inversely, “Show Quick Access Toolbar Below the Ribbon” to move.



- The QuiKer search may yield more Customers than displayed in AMS as QuiKer does not mirror search preferences. QuiKer displays Active and Inactive Customers, Prospects, and Suspects.
- When adding a new Client to AMS, Outlook will need to be Refreshed before the Client displays in the QuiKer Customer drop-down. Remember to close Outlook and re-open it to have the most recent Client addition previewed from within the QuiKer plug-in.
- You can have multiple instances of the QuiKer Create Activity screen open in Outlook, allowing you to input all client emails and attachments to AMS and reduce process time.
- CC'ed users on an email are automatically added to the Description field within the QuiKer Create Activity Screen, including them in the Activity being created in AMS.
- QuiKer allows Users to attach multiple emails to one Activity with its convenient drag-and-drop feature as seen below:



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



Troubleshooting

1. 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.

2. Microsoft Outlook disables the QuiKer Add-In

Follow this two-step process to enable:

1. Click on File > Options > Add-Ins > Manage > Select "Disabled Items" > Click "Go" > Select QuiKer Add-In > Select Enable > OK.
2. Go to File > Select "Manage COM Add-ins" > Highlight "QuiKer Add-in" and Select "Enable".

3. A customer is not showing up in Search

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

4. I receive an error message that the Customer.dat file is missing, or could not find the employee 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 your Network's 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.



Contact

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

