

Copyright 1998-2006, E-Z Data, Inc.

All Rights Reserved.

No part of this documentation may be copied, reproduced, or translated in any form without the prior written consent of E-Z Data, Inc.

All product names are trademarks of their respective manufacturers or organizations.



918 E. Green Street

Pasadena, CA 91106

Web: <http://www.ez-data.com>

Telephone: (626) 585-3505

Fax: (626) 440-9097

U.S. toll-free fax: (800) 779-3123

Table of Contents

Introduction	1
Requirements for the Quik! Forms Library Integration	1
Initial Setup	1
Install SmartLink for Quik! Forms	1
Create a Folder on your Local Directory	1
Specify the Folder and Quik! Forms Executable Directory	2
Set up the Database Connection in Quik! Forms Library	3
Set up Data in SmartOffice.....	3
Working with Quik! Forms Library	5
Fill out Forms with Quik! Forms Library	5
Frequently Asked Questions.....	6

Introduction

This guide outlines the use of the Quik! Forms Integration for SmartOffice version 5.1 and higher. The integration of this application involves exporting data from SmartOffice to the Quik! Forms Library form filling software, saving time filling out hundreds of important forms with client data. This module is available as a separate add-on to SmartOffice. For information on purchasing the Quik! Forms Integration, please contact E-Z Data's Sales Department at (800) 777-9188. For more information, visit www.ez-data.com. For more information on the Quik! Forms Library application, visit www.etiforms.com.

Requirements for the Quik! Forms Library Integration

- Quik! Forms Library 5.1.22 or higher
- SmartOffice Online 5.1 or higher
- Rights to the Quik! Forms Library integration
- Install SmartLink for Quik! Forms and specify the CSV file and Quik! Forms Library executable file locations.

Please see the [SmartLink for Quik! Forms](#) fast class, which will take you through the setup process and explain the features of SmartLink for Quik! Forms.

Initial Setup

In order to begin filling out forms automatically with Quik! Forms Library, you must first install SmartLink for Quik! Forms.

Install SmartLink for Quik! Forms

1. Log in to SmartOffice.
2. Select **Installations** from the expanded **User Setup** menu to display the Installations list.
3. Click the **SmartLink for Quik! Forms** hyperlink to begin downloading the component necessary to automate the form filling process with Quik! Forms Library.
4. This will install SmartLink for QuikForms on your workstation. To find this program, click **Start > Programs** from your workstation to expand the Programs list.

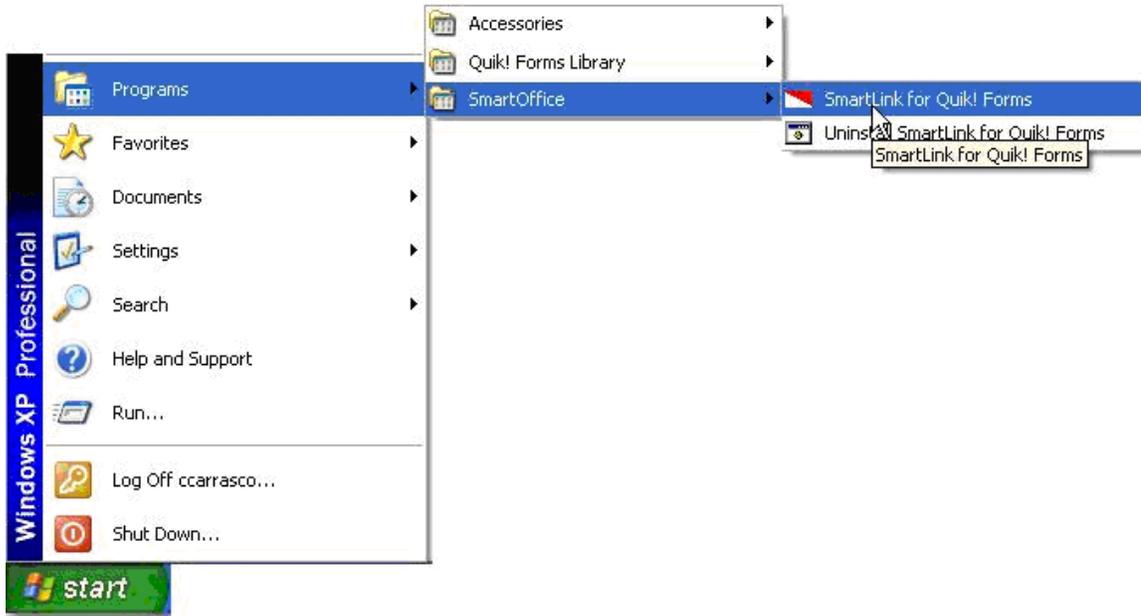
Once this is installed, you will need to create a folder on your local directory to house the CSV file. This file will include the data that will be transferred from SmartOffice to Quik! Forms Library.

Create a Folder on your Local Directory

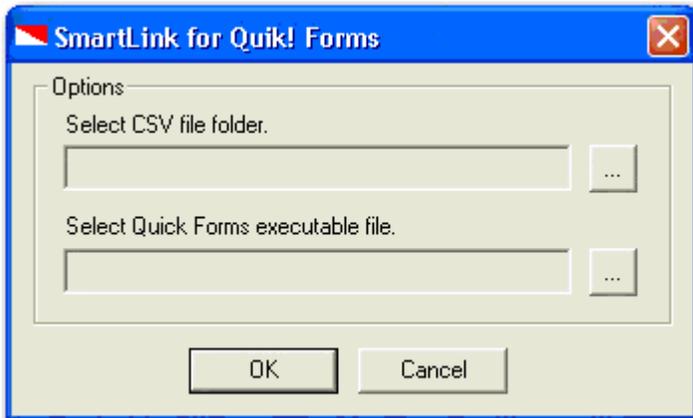
1. From your workstation, press **Windows Logo + E** to open Windows Explorer.
2. Create a folder anywhere you want, such as Quik Forms directly under the C drive. Note the location and name of the folder, as you will be browsing to it later.

Specify the Folder and Quik! Forms Executable Directory

1. From your workstation, click **Start > Programs > SmartOffice > SmartLink for Quik!Forms**.



2. The SmartLink for Quik! Forms dialog box displays.



3. Click the **Selection** button next to the Select CSV File Folder field to browse to the folder you recently created (e.g., C:\Quik Forms).
4. Click the **Selection** button next to the Select Quik Forms Executable File field to browse to the folder where Quik! Forms Library was installed and then double-click **Quik.exe** (e.g., C:\Program Files\Quik Forms Library\Quik.exe).
5. Click **OK** to save this information.
6. Congratulations! The seamless integration between SmartOffice and Quik! Forms Library is now complete.

In order for the data to be included in the forms, you must inform Quik! Forms of which product you are using.

Set up the Database Connection in Quik! Forms Library

1. From Quik! Forms Library, select **Database Connection** from the expanded **Tools** menu.
2. Select **SmartOffice (EZ-Data)** from the Step 1 – Choose your Database Type drop-down list.
3. From the Step 2 – Locate your Database field, click the **Browse** button to locate the folder that you created previously (e.g., Quik Forms).
4. Click the **Save** button to save this information. Note that this is a one-time setup and you will not have to perform this procedure again.

Set up Data in SmartOffice

In order to automatically populate the fields in Quik! Forms Library, the data must be entered correctly in SmartOffice; otherwise, the forms will be populated inconsistently for each contact record.

Data can be entered for the following:

• Client	Main contact used for the application.
• Joint Applicant	Anyone listed on the Key Relations tab for the selected contact record.
• Beneficiaries	Anyone listed on the Key Relations tab that is specified as a beneficiary.
• Annuitants	Anyone listed on the Key Relations tab that is entitled to receive benefits from an annuity.

The table below details the fields to populate in SmartOffice in order to be automatically populated in Quik! Forms Library.

Caution: The joint beneficiaries and annuitants are considered anyone who is part of the Client's key relations. In order to automatically populate the forms in Quik! Forms Library, they must be associated as the Client's key relations; otherwise, the information will not be available in the Quik! Forms Library forms.

SmartOffice Fields	Comments	Quik! Forms Library Fields
The following data is entered on the Contact (P) tab.		
First Name		First Name
Middle		MI
Last Name		Last Name
Birth Date		DOB
Marital		Marital Status
Gender		Sex
Tobacco		Smoker
Employer		Employer
Occupation		Occupation
Job Title		Position
Primary Residence Phone Number	Make certain to select the Primary Residence option.	Home Phone
Business Fax Number	The first home fax number entered will be the one used	Home Fax

SmartOffice Fields	Comments	Quik! Forms Library Fields
	by Quik! Forms Library.	
Primary Business Phone Number	Make certain to select the Primary Business Phone option.	Employer's Phone
Primary Business Phone Extension		Employer's Phone Extension
Business Fax Number	The first business fax number entered will be the one used by Quik! Forms Library.	Employer's Fax
Preferred E-mail Address	Make certain to select the Preferred option.	Email
Primary Residence Address		
Address Block	Make certain to select the Primary Residence Address option.	Address 1
Address 2		Address 2
Address 3		Address 3
City		City
State		State
ZIP Code		Zip
Country		Country of Residence
Primary Business Address		
Address Block	Make certain to select the Primary Business Address option.	Employer's Address
Address 2 (xref)		Address 2
Address 3 (xref)		Address 3
City		Employer's City
State		Employer's State
ZIP Code		Employer's Zip
Country		Employer's Country
The following data is entered on the Add'l Personal tab.		
Tax		Federal Tax Bracket
Primary Residence Address State		State Tax
Total Income		Income
Net Worth		Net Worth
Citizenship		Citizenship
SS #		SSN
Driver's License #		Driver's License #
State		Driver's License Issue State

Working with Quik! Forms Library

Once all of the data is entered in the appropriate fields in SmartOffice, you are ready to begin completing forms.

To Open Quik! Forms Library from SmartOffice

1. Find the appropriate Contact record and either:
 - Select the Contact from the Contact Summary.
 - Open the Contact record and then click the **Contact (P)** or **Add'l Personal** tab.
2. Click the **Quik! Forms Library** button.
3. The File Download dialog box displays with the following options:
 - **Open** – Opens Quik! Forms Library with the contact and key relation data transferred to Quik! Forms Library.
 - **Save** – Saves the file to the specified directory on your computer.
 - **Cancel** – Cancels the process.

Tip: Clear the Always ask Before Opening this File option if you do not want to display this dialog box in the future.

Fill out Forms with Quik! Forms Library

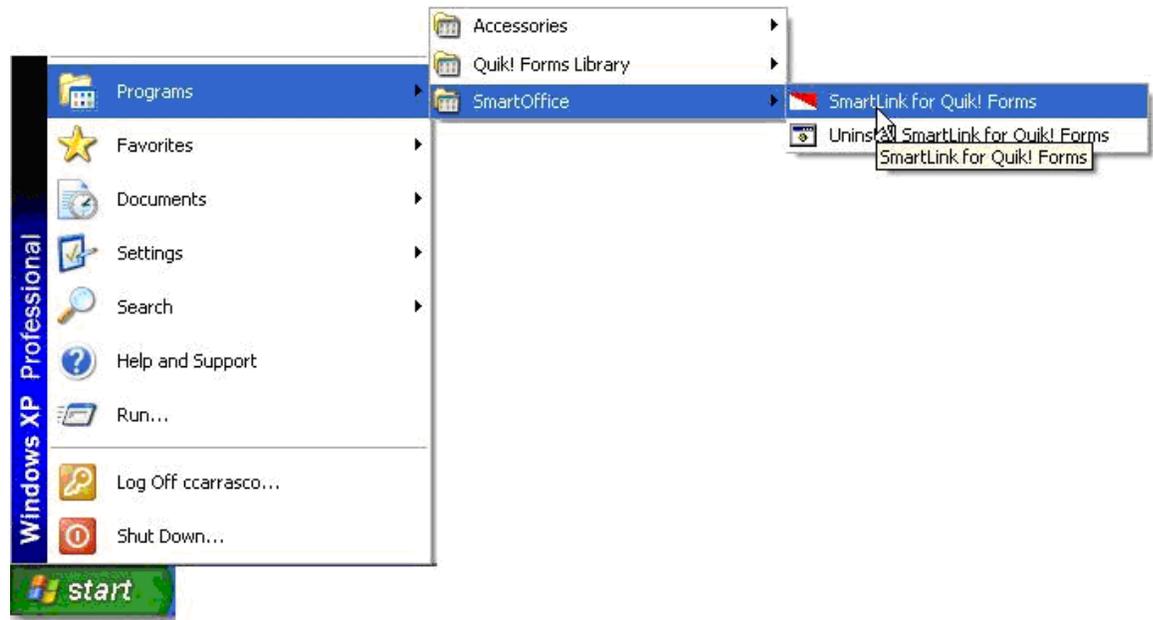
Once you have set up the integration between SmartOffice and Quik! Forms, you are ready to begin filling out forms automatically.

There are a few key things you should understand when working with Quik! Forms Library.

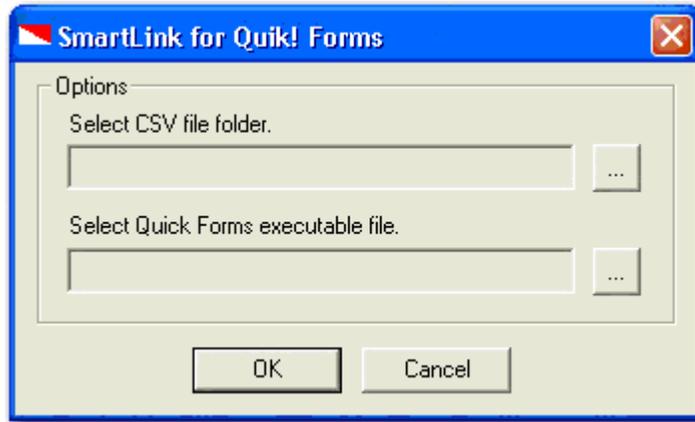
- Once you have clicked the **Quik! Forms** button, the selected contact record and his/her key relations will be transferred to Quik! Forms Library.
- These contacts will be listed in various drop-down list fields within Quik! Forms Library.
- In Quik! Forms Library:
 - In the Step 1 – Choose A Client section, the Client, Spouse, and Joint options do not work for this integration.
 - Select the **Add Annuitant/Beneficiary** option whenever you would like to include a Joint Applicant, Policy/Account Owner, Annuitant, and/or Beneficiary.

Frequently Asked Questions

1. Quik! Forms does not automatically open after clicking the **Quik! Forms** button.
 - **Question:** When I click the **Quik! Forms** button, why does a white screen open and immediately close?
 - **Answer:** You have not set up SmartLink for Quik! Forms which automatically opens Quik! Forms after clicking the **Quik! Forms** button.
 - **Action:** To resolve this issue:
 - a. Install SmartLink for Quik! Forms if you have not already done so. See the *Install SmartLink for Quik! Forms* section.
 - b. Create a folder on your computer. See the *Create a Folder on your Local Directory* section.
 - c. Specify the location of the folder you created and the location of the Quik! Forms Library application. See the *Specify the Folder and Quik! Forms Executable Directory* section.
2. The only option is to save the file.
 - **Question:** When I click the **Quik! Forms** button, the only option available in the File Download dialog box is to **Save** or **Cancel**. Why isn't **Open** available?
 - **Answer:** You have not installed SmartLink for Quik! Forms to automatically open the Quik! Forms Library.
 - **Action:** To resolve this issue:
 - a. From your workstation, click **Start > Programs > SmartOffice > SmartLink for Quik! Forms**.



- b. The SmartLink for Quik! Forms dialog box displays.



- c. Click the **Selection** button next to the Select CSV File Folder field to browse to the folder you recently created (e.g., C:\Quik Forms).
- d. Click the **Selection** button next to the Select Quick Forms Executable File field to browse to the folder where Quik! Forms Library was installed and then double-click **Quik.exe** (e.g., C:\Program Files\Quik Forms Library\Quik.exe).
- e. Click **OK** to save this information.
3. Quik! Forms Library does not automatically open.
- **Question:** When I click the **Quik! Forms** button and then click the **Open** button, Quik! Forms Library does not open automatically. What am I doing wrong?
 - **Answer:** You must specify the folder where you want the file that includes the exported data from SmartOffice to reside.
 - **Action:** To resolve this issue follow the instructions in FAQ #1.
4. The contact and its key relations are not included in Quik! Forms.
- **Question:** Within Quik! Forms, why aren't the contacts listed in the Step 1 – Choose A Client drop-down list?
 - **Answer:** You must connect SmartOffice to Quik! Forms in order to begin filling out forms.
 - **Action:** To resolve this issue:
 - a. From Quik! Forms Library, select **Database Connection** from the expanded **Tools** menu.
 - b. Select **SmartOffice (EZ-Data)** from the Step 1 – Choose your Database Type drop-down list.
 - c. From the Step 2 – Locate your Database field, click the **Browse** button to locate the folder that you created previously (e.g. Quik Forms).
 - d. Click the **Save** button to save this information. This is a one-time setup; you will not have to perform this procedure again.

5. A blank dialog box is displayed instead of the File Download dialog box.
- **Question:** When I click the **Quik! Forms** button, why does a blank dialog box display instead of the File Download dialog box?
 - **Answer:** Make certain the **File Download** option in the Internet Explorer settings is enabled.
 - **Action:** To resolve this issue:
 - a. From Internet Explorer, select **Internet Options** from the expanded **Tools** menu.
 - b. Click the **Security** tab.
 - c. Click the **Custom Level** button.
 - d. In the Download section, **Enable** both the Automatic Prompting for File Downloads and File Download options.
 - e. Click the **OK** button to save the changes.