Toolkit Direct
Carrier Software and Websites Guide

Things you will find in this guide:

- How to download and install the *Toolkit Direct Server*
- What to do with the server once it is installed
- Where to find the *Carrier software*
- How to download and install the Carrier software
- Troubleshooting tips for potential issues that may arise

The screens below are seen when loading PPI Toolkit Direct in *Microsoft Edge. Screens may appear differently in other browsers.*

❶ Click on "*Carrier Software and Websites*" from the side navigation menu.
❷ Click on blue bar labelled "*Setup*"
❸ Click on light blue button labelled "*Download Latest Toolkit Direct Resources Server*"
❹ Click on "*Open file*" in the pop-up at top right of your browser.

If you don't see the pop-up, you can find the file in your "*Downloads*" folder within windows explore. Double click the file labelled: *PPIToolkitDirectResources.msi*
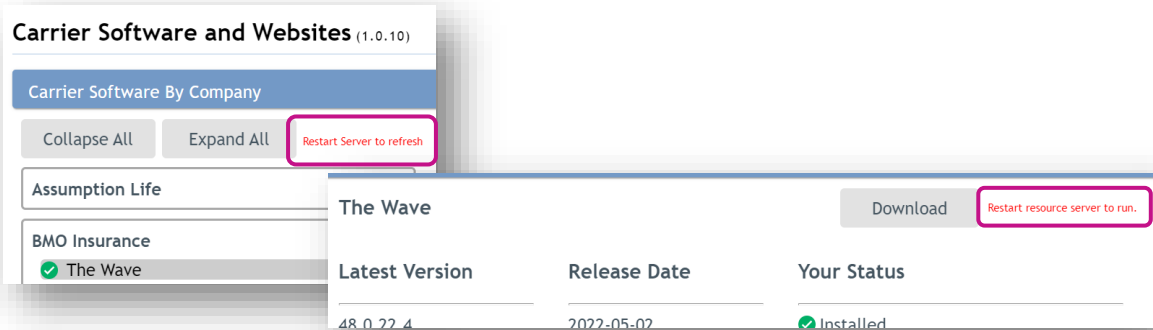
This will launch the server, allowing you access to the carrier software.
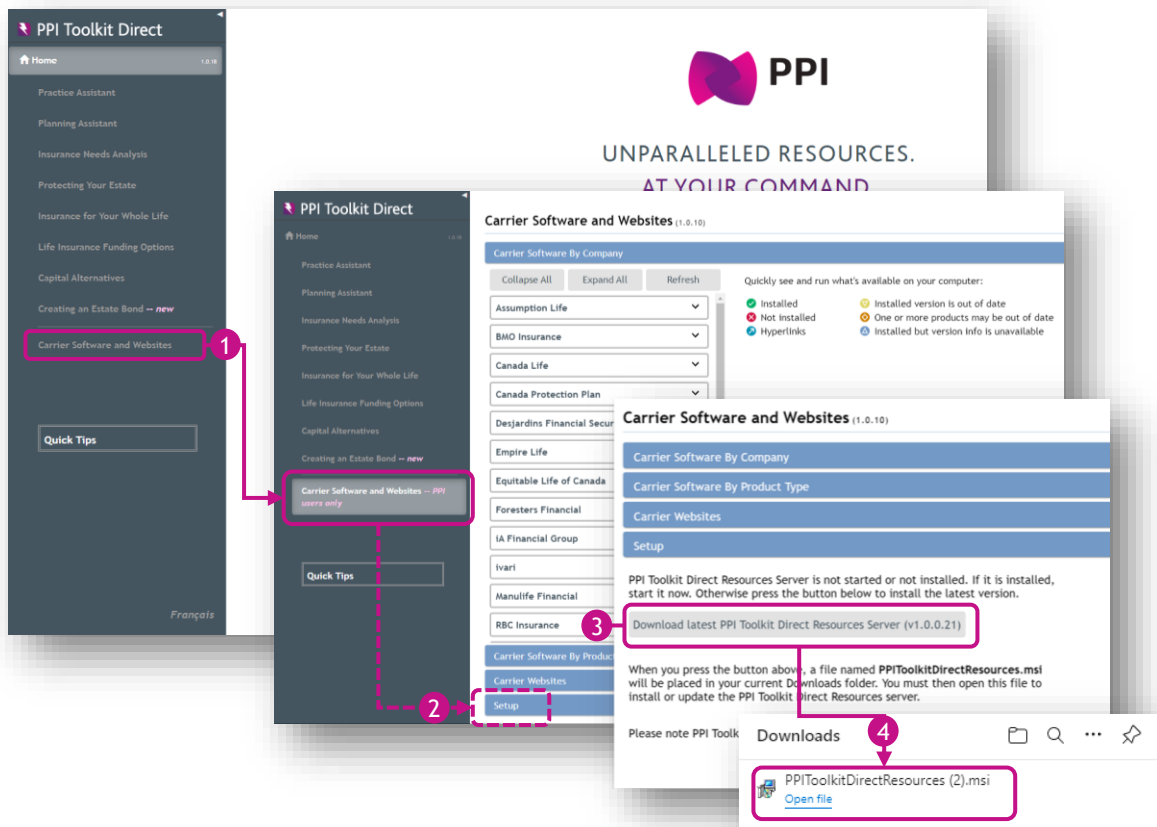
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If you received the following messages in the carrier screen: "*Restart resource server to run/refresh.*"

If the above text in red appears follow these steps:

• Windows Start Menu
• Scroll to and click *PPI Programs*
• Scroll to and click *PPI Toolkit Direct Resources Server*

Carrier Software

❶ Click on "*Carrier Software and Websites*"
❷ On the next screen click on the "*Expand All*" button
❸ In carrier drop downs, identify the software status using the included "*color codes*."
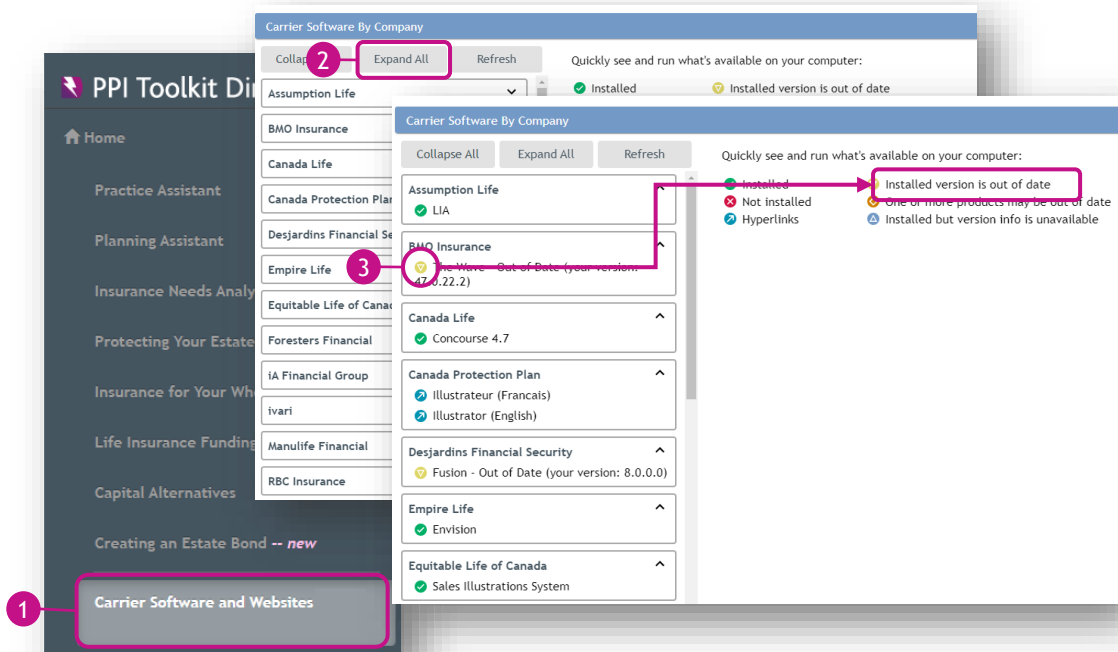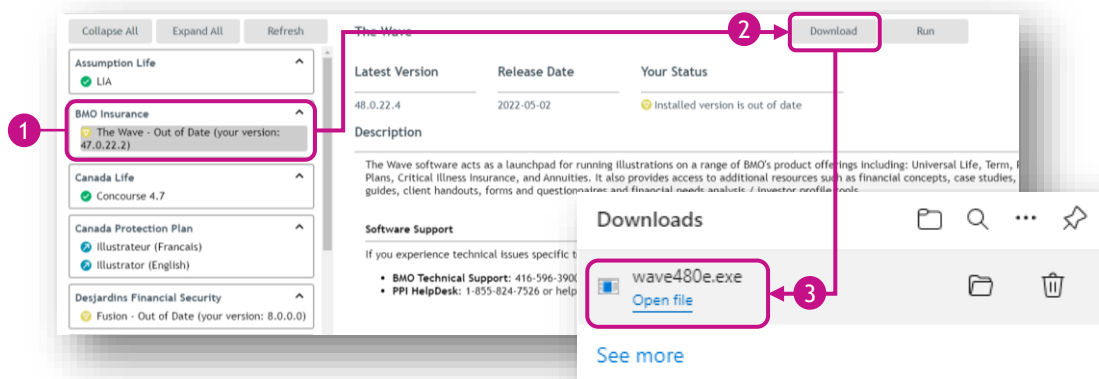
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Upon first view of expanded carriers you will see Red circles indicating; "Not installed."
In the example we have a Yellow circle but the steps are the same.

1 Click on "*carrier field*" where the circle is.
2 In the newly opened page click on "*Download*."
3 From the *Downloads* pop-up click on "*Open file*" once it's done downloading.
• The file will begin to install, follow its direction.

• Note that Manulife will require an install code: 17035
• RBC will also require an install code: 62B46

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Troubleshooting - The screens below are as seen in *Microsoft Edge. Screens may appear differently in other browsers.*

If you get a *Trust* warning while downloading, follow the steps below:

❶ Click "*3 dots*" next to *trust warning*.
❷ Click on "*Keep*"
❸ Click on "*Show more*"
❹ Click on "*Keep anyway*" *(Open file)*
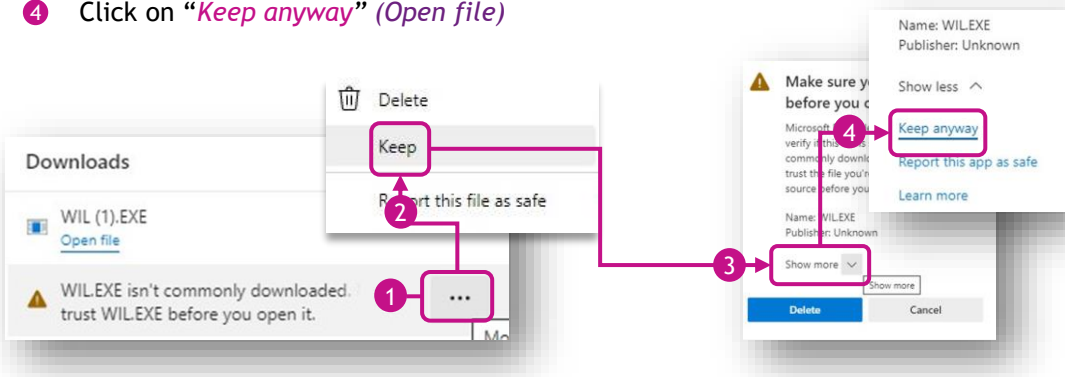
If you have a Yellow circle and a simple download and install of the carrier software does not yield an up to date symbol. Here are some additional steps which may resolve the issue.

❶ Click on "*Out of Date*" carrier
❷ Click on "*Run*" not download
• On carrier website check off updates and click install
❸ After install click on "Refresh" button.