

A Guide to Creating PDF Forms in Advisor

Advisor Version 2021.5

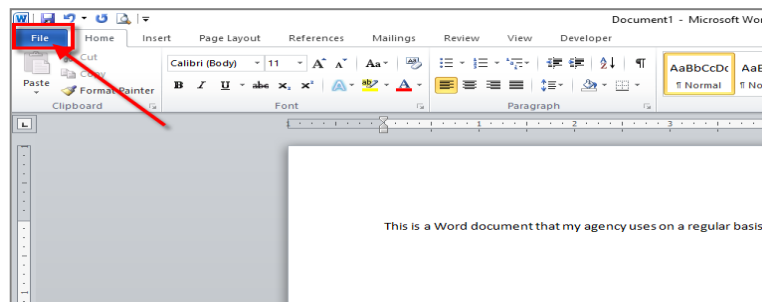
The Forms module in Advisor allows users to create forms that staff can utilize while in the field. Any PDF forms can be created for agency-specific use. Users must have Expert PDF installed on their system to create these forms. There is an annual cost for this program.

List of Topics

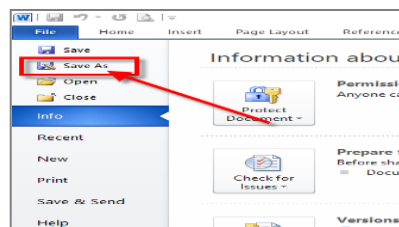
- Set-Up Requirements for Creating a Form
- What are Annotations and Why are They Important?
- How to Create a PDF Form for Advisor

Set-Up Requirements for Creating a Form

- User must have Expert PDF installed on their system. This does not need to be on the server but can be on the employee's computer.
- User must have the most up-to-date DLLs added to their system. Email it.support@primarysolutions.net for assistance.
- The document to be used needs to be in PDF format. If the form is a Word document (.doc) or an Excel spreadsheet (.xlsx), Word or Excel can format the existing document to PDF for use in Expert PDF. See the instructions below for Word and Excel (note: your screens may appear different depending on the version of Word being used).
 - Open the document and click 'File'



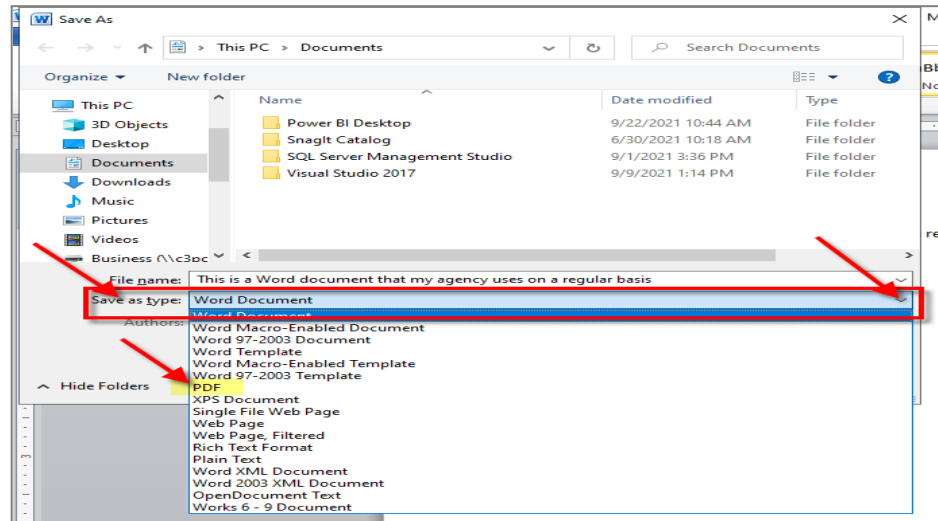
- Click 'Save As'



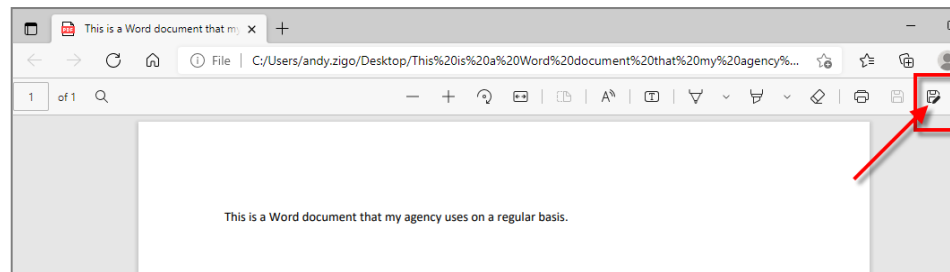
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Advisor Version 2021.5

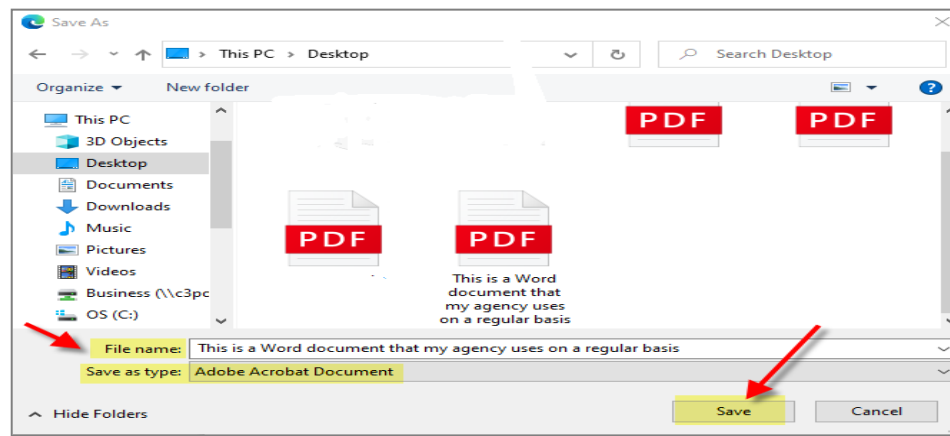
- This will open the Save As dialogue box where the User will select 'Save as type' and choose 'PDF' in the dropdown.



- The document will then open up as a PDF in a browser window where you can select 'Save as' (floppy disk icon).



- From here, the document (now a PDF), can be renamed and a location selected.



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Advisor Version 2021.5

- Your Word or Excel document is now a PDF and ready for use in Expert PDF.

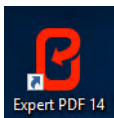
What are Annotations and Why are They Important?

Annotations are bookmarks in the PDF that pull information from your database directly into the form when the User adds it in Advisor or Anywhere. Examples of annotations may be the Consumer Name, Location, etc. There are specific annotations that have been created for Advisor and Anywhere only. Please see the Advisor Annotation Listing document.

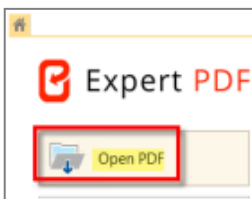
Primary Solutions can add additional annotations, but this would need to be done during a release. Please contact Product Support at ProductSupport@primarysolutions.net if you need additional annotations added to your system.

How to Create a PDF Form in Advisor

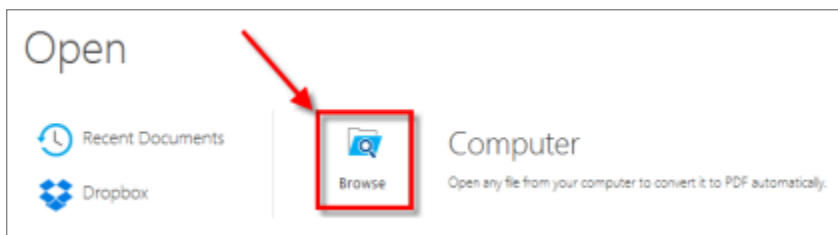
- Open Expert PDF (double-click the icon)



- Select 'Open PDF'



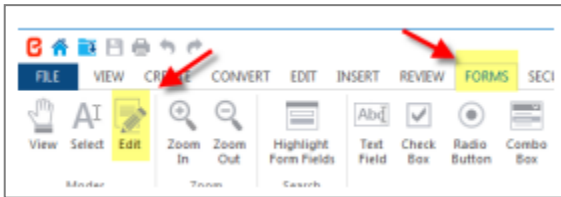
- Click 'Browse' to select your document's location and open



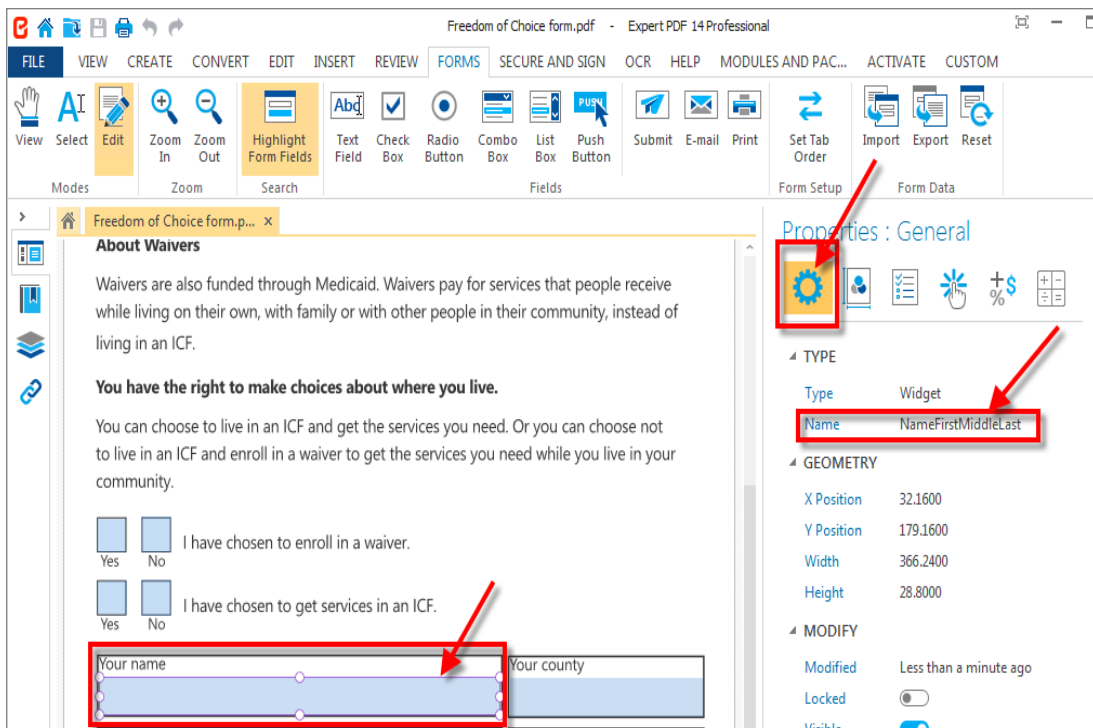
A Guide to Creating PDF Forms in Advisor

Advisor Version 2021.5

- Click the 'Forms' Tab then select 'Edit'



- Click in the field to be edited – go to 'Properties' on the right and choose 'General' (gear icon). Under 'Type', enter the desired annotation for the database (NameFirstMiddleLast in the example below). **Important note: Once a field has an annotation attached to it, that field is not able to be edited when opened in Advisor or Anywhere.**



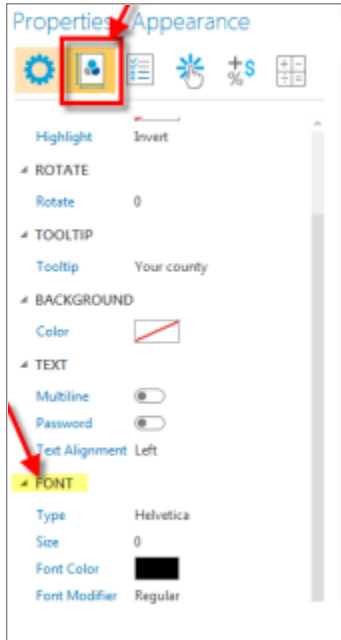
- Hit 'Enter', click in another section or hit the 'Save' icon in order for the change to be updated



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Advisor Version 2021.5

- Choose 'Appearance' Properties (circles icon) to update the font color (i.e. change to black), font size or background appearance for that field.



- Once the desired changes are completed, click 'FILE' and then 'Save as'. Save in the psiserv/FormTemp folder. This will allow document use in Advisor. See a 'Guide to Forms' in Advisor documentation.

