



A Guide to Anywhere Forms

Advisor Version 2023.2

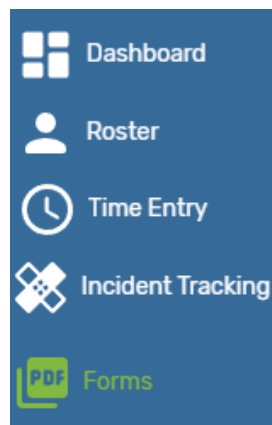
Anywhere Forms was created to give the users the flexibility to create or view Forms while in the field. These forms, PDF only, can be created for agency specific use or can utilize the forms available in the Advisor application. Keep in mind that the forms must be a PDF.

List of Topics

- How to Use Forms in Anywhere
- Set Up Requirements

How to Use Forms in Anywhere

- When users click on the Forms icon in Anywhere, the Roster of consumers will appear in the window. This list will be the same list the user sees in the Roster Module.



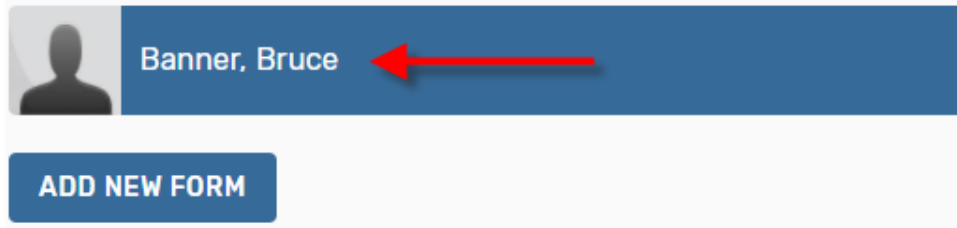
- Users will choose the individual and click ‘Done.’
 - When the person is chosen, the system will ensure that no one else has this form opened. Only one person may edit at one time.
 - If the form is opened, the user will receive a pop-up that states, ‘this form is currently locked by (User Name). Any changes you make to this form will not be saved.’
- The Forms window will open for that individual. The individual’s name is listed at the top followed by a ‘Add New Form’ button. This allows the user to add additional forms, if desired.

Please note: Users cannot work with more than one individual at one time in this window.

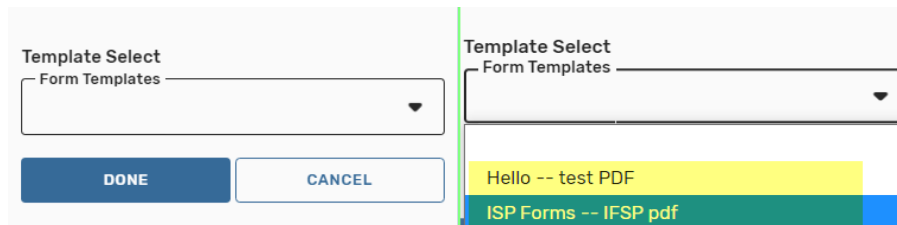


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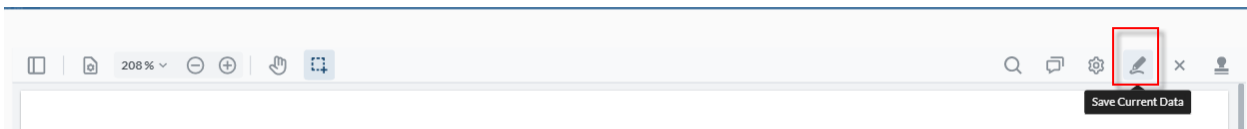


- To **add a new Form**, click the 'Add New Form' button.
 - A small box will appear requiring the user to enter the Form Template that is desired. The listing appears as Form Type/Template Name
 - Choose the desired form and click 'Done.'



Please note: Users will only see those Form Types which have been assigned in Security.

- The form will open pre-populated based on the 'annotations' (bookmarks) set in the system. If there are no annotations set, then the report will appear without any database information filled in.
- Users can fill in the required information, but **MUST SAVE** before exiting the form. The system will prompt the user to save, but best practice is to save and save often while working in your system.
 - To save the form, click on the 'save' icon at the top of the page.

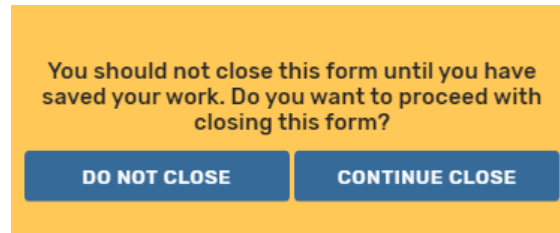


- If a user attempts to close without saving, a prompt will appear reminding the user to save.

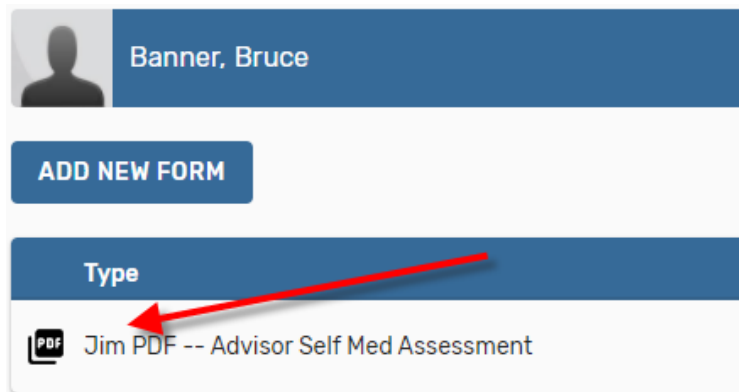






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- To **update an existing Form**, click on the individual's form in the form listing.

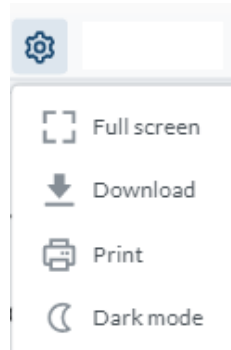


- The form will open to update or change any existing information.
 - The user will need to save once the information is updated by clicking on the save  button.
- To **refresh the data on a form**. Open the individual's form and click the refresh  button. Each form saved is a 'snapshot' of the individual's information. If this information has changed since the form was last opened, any annotation (bookmarked) information will be updated based on the Consumer record in Advisor.
 - Save your work by click the save  button.
- To **print or save a form** to a different location. Users should open the individual's form.
 - Go to the gear  icon. Users will receive a dropdown. Choose 'Print.'





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- In this dropdown, users may also download (Save As) the form to their desktop.

Please note: Users do NOT need Adobe to print forms from Anywhere.

- To **close the PDF document**, click on the close  button.
- To **delete a Form from Anywhere**, go to the individual's forms and locate the form to be deleted. Click the delete  button in the forms listing.

Set Up Requirements – for Administrative Staff

- The module must be turned on by Primary Solutions staff. You can reach us by emailing productsupport@primarysolutions.net.
- Local computers must have the most recent DLL registry for this module to utilize PDF's in Advisor. PDF's do not need this registry requirement for Anywhere. To update the DLL, see the document entitled, 'DLL Registration for ANY Forms'
- Security
 - Go to Administration/Security/Anywhere Forms
 - Users may be granted full security through Delete, Update, Insert and View
 - To restrict users, limit through the Form Types listed. This list is pulled from the Form Types listed in your Advisor Forms module. These keys are all restrictive to the user.
- For users wanting to create custom forms, there will be a separate document sent entitled, 'A Guide to Creating PDF Forms in Advisor.'

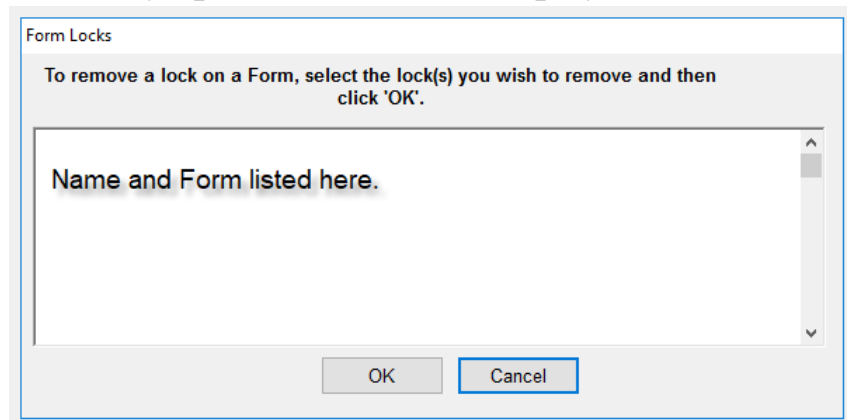


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Closing a Locked Form– for Administrative Staff

- Open Advisor/Administration/System Preferences
 - Go to Forms tab
 - Click the Form Locks button.
 - Any open forms will be displayed with user's name



- Click and close any forms that should not be open.
 - Keep in mind that closing a form will lose any information for the user that has not yet been saved.