



Manual

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1. Installation

*NOTES

- 1) Please close ACT! before starting the installation
- 2) If Running Windows 7 Turn off User Account Control Settings during install (UAC) This can be turned back on after installation
- 3) If Running Windows 7 right click and run as Administrator

A. Click on "Setup.exe"



B. Select the installation folder

Default Path:

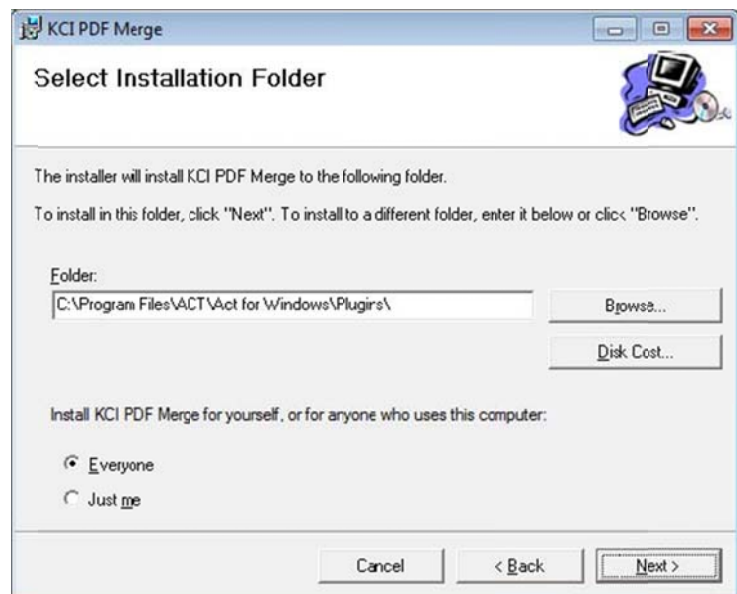
C:\ProgramFiles\ACT\
ActforWindows\Plugins

Select who to install for:

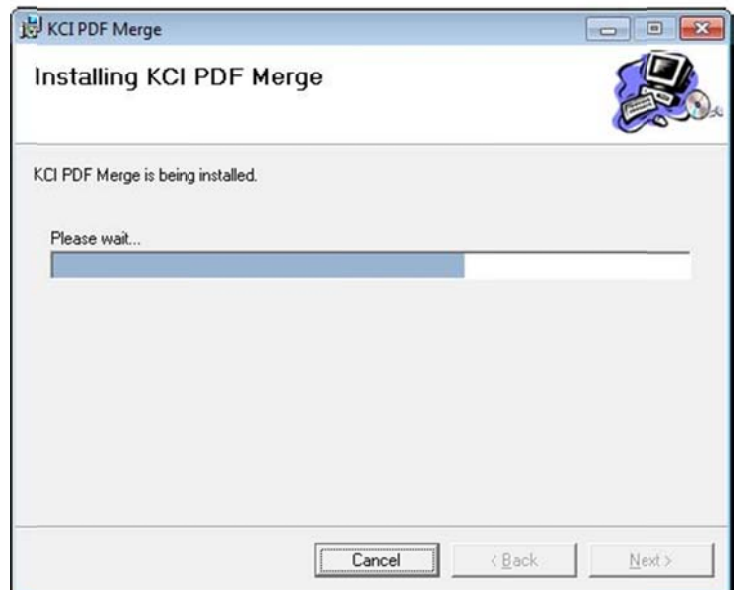
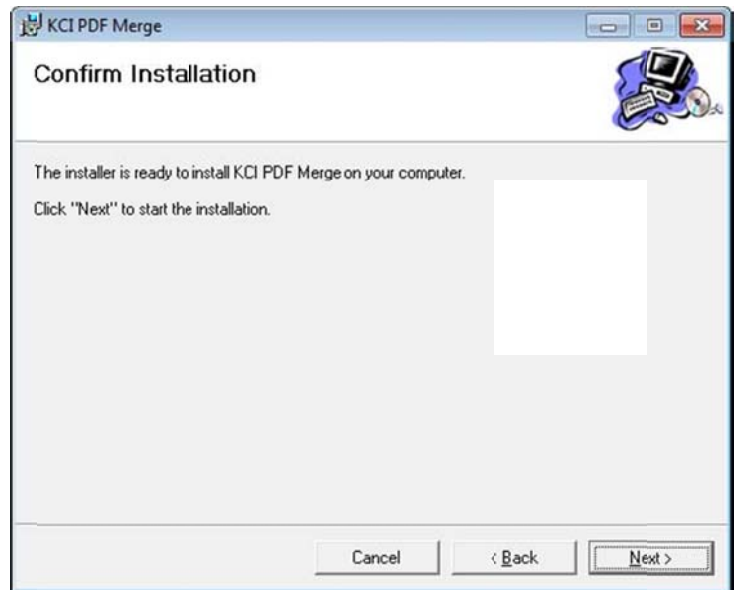
Everyone (default)

Myself

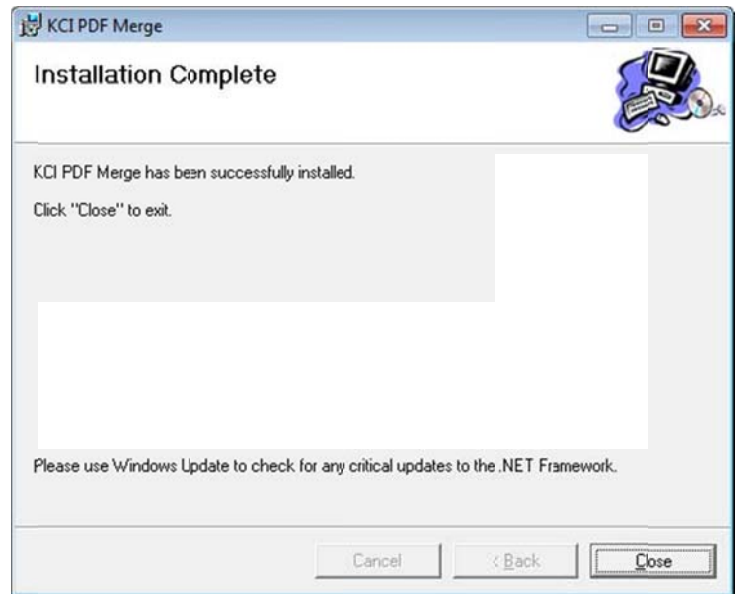
Click "Next"



- C. Confirm Installation by clicking
“Next”



D. Click “Close” to finish



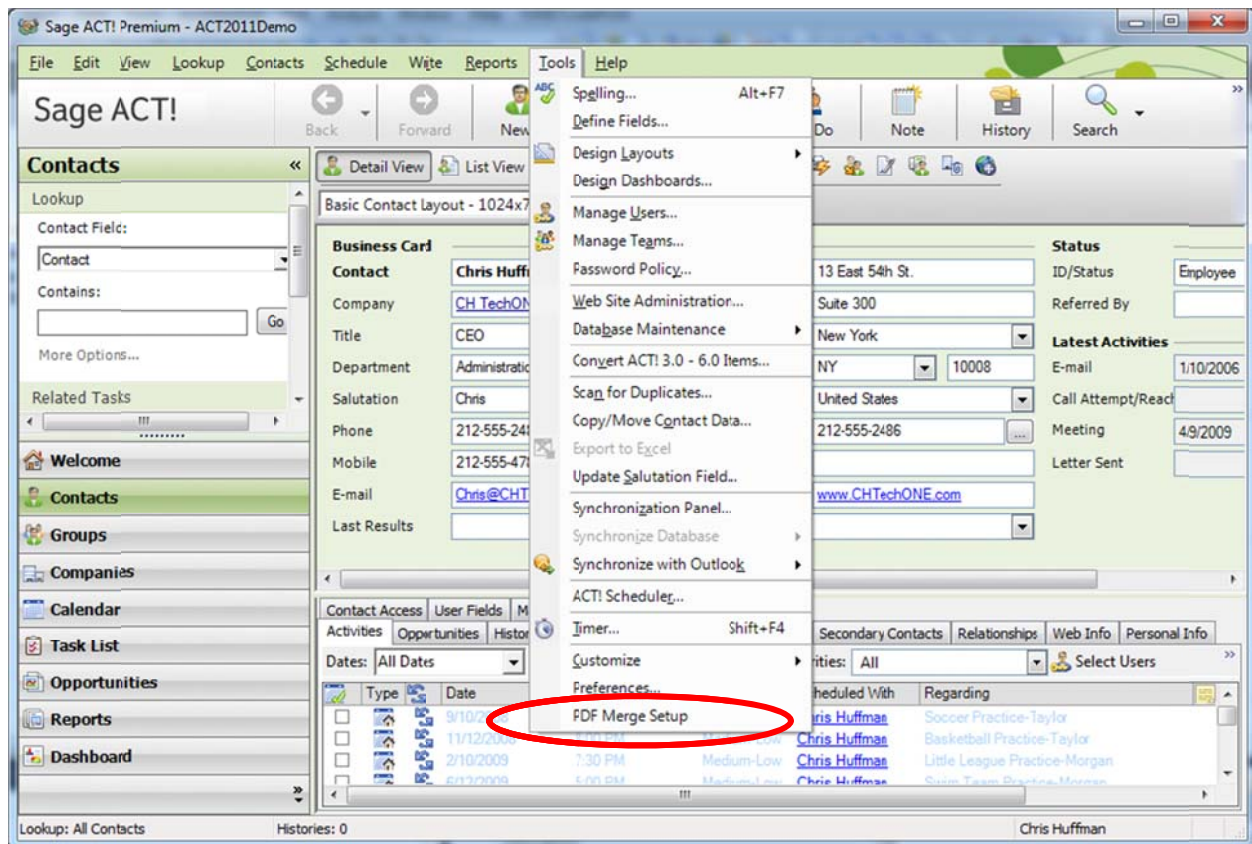
System Requirements:

1. ACT! 2009 , ACT! 2010, ACT! 2011, or ACT! 2012 by Sage (PC must meet Sage’s guidelines for minimum system requirements for ACT!)
2. Microsoft Office XP through Office 2010
3. PDF software capable of creating PDF forms

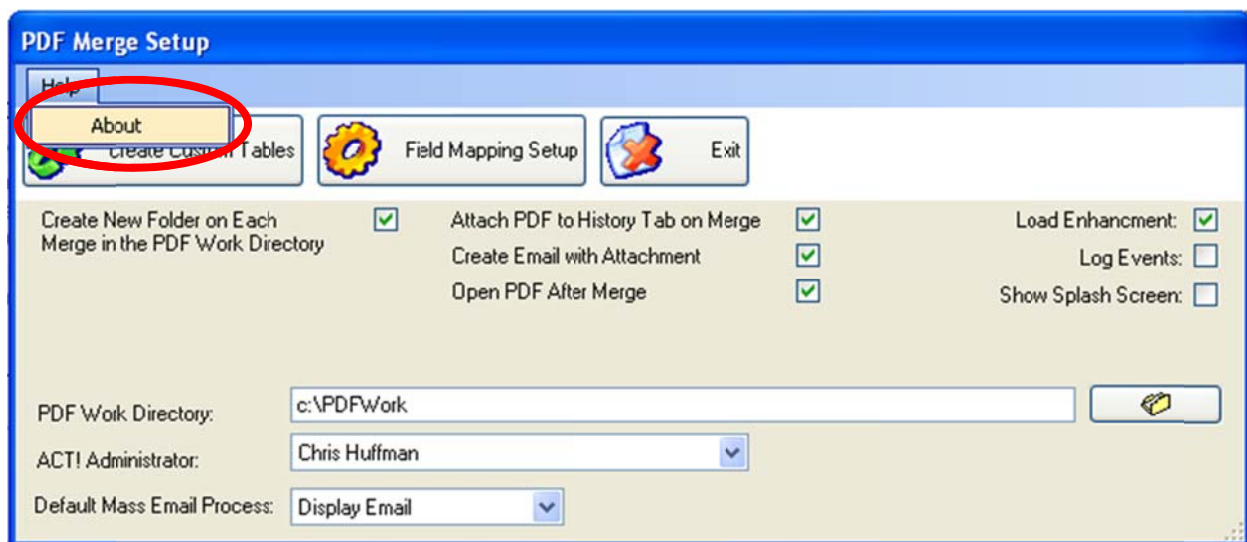
*NOTE – There are some limitations with using Outlook 2002/XP for emailing

2. Registration – In ACT!

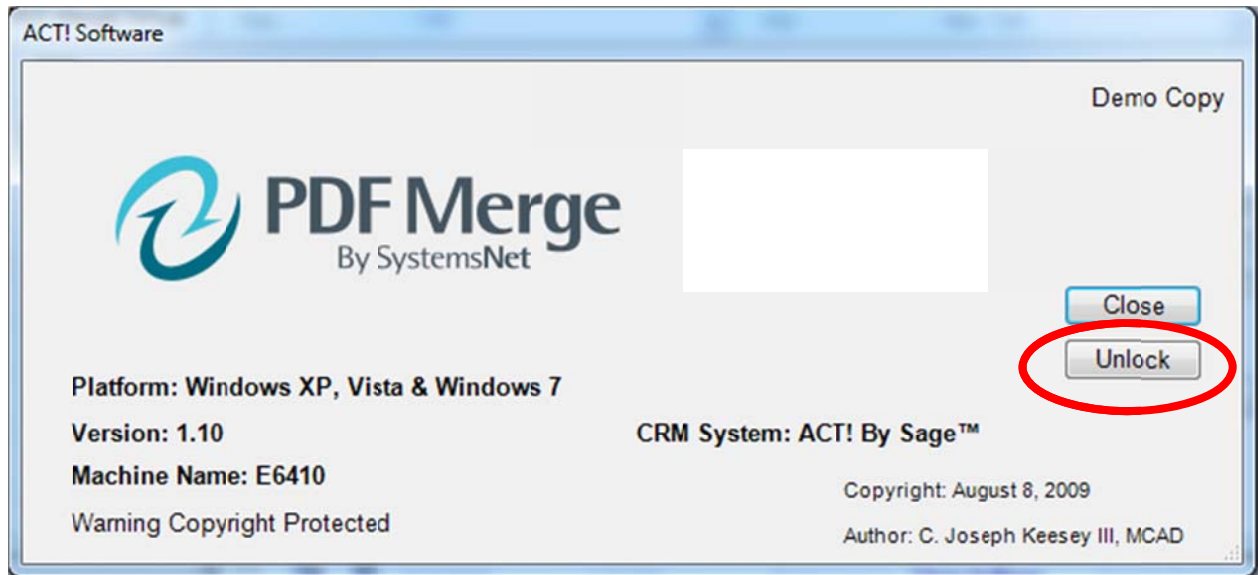
A. In the menu bar under “Tools” select “PDF Merge Setup”



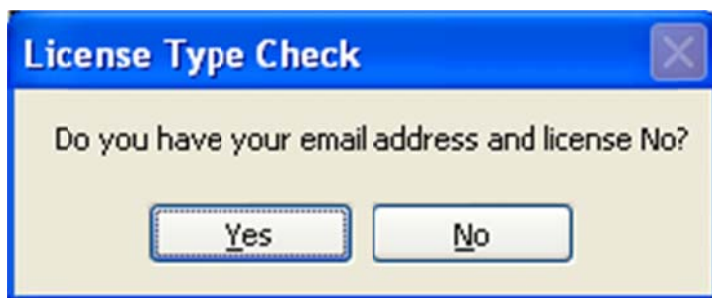
B. Click on “Help” and select “About”



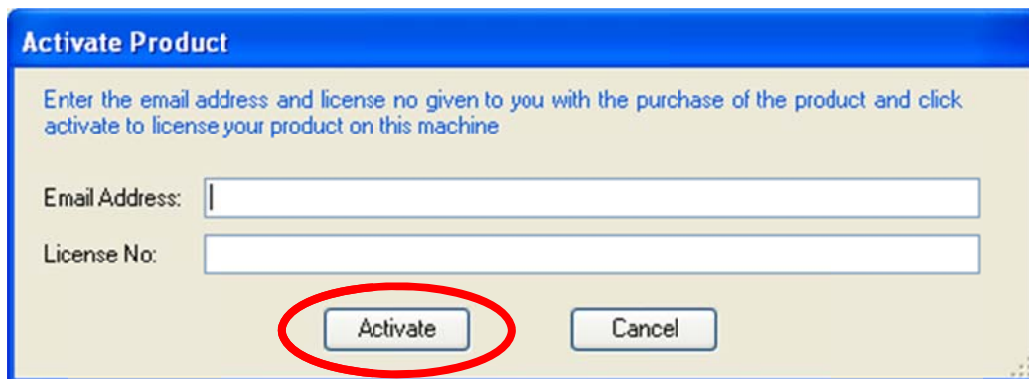
C. Click on "Unlock"



D. Answer "Yes" to the question that you have the email address and license no.



E. Fill in the form and select "Activate"



Note: Enter the email address of the person the license is assigned to and the license number that was emailed at the time of purchase. Each license number can only be used one time. Once a license number has been activated, it cannot be used again.

3. Configuration of Custom Tables – In ACT!

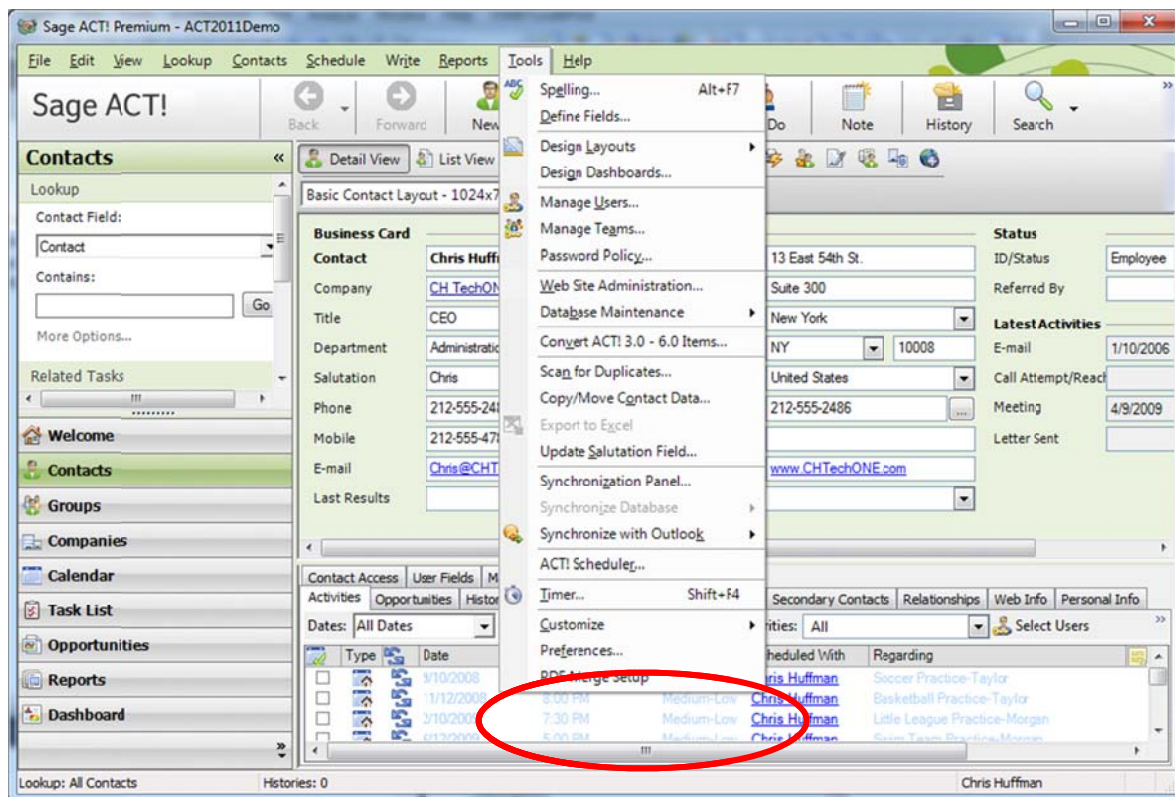
***NOTE - These steps are to be completed by the Administrator and only need to be done once**

Pre-configuration tasks

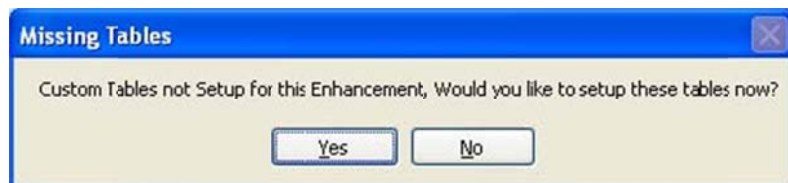
- A. Create 2 new Folders: “PDF work” and “PDF Template”
 1. Single users create on local C:drive
 2. Network users create on a shared network drive

Creating Tables

- A. Open ACT!
- B. In the menu bar under “Tools” select “PDFMerge Setup”



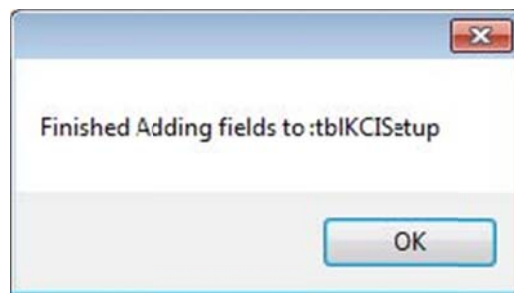
- C. A prompt will display asking to create the custom Tables. Click “Yes”.
 3. This will create the necessary Tables in the database to run PDFMerge
 4. This will only need to be run once per database
 5. The layout may flicker during this process
- Note: PDF Merge will NOT run until the custom tables have been created



D. Click "Yes"



E. Click "OK"



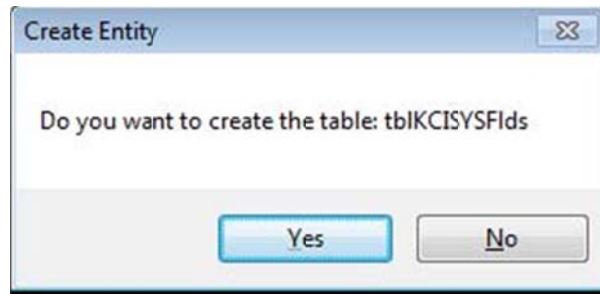
F. Click "Yes"



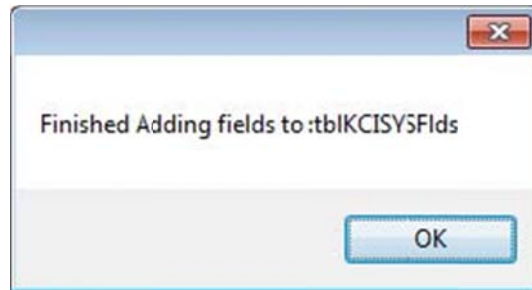
G. Click "OK"



H. Click "Yes"



I. Click "OK"

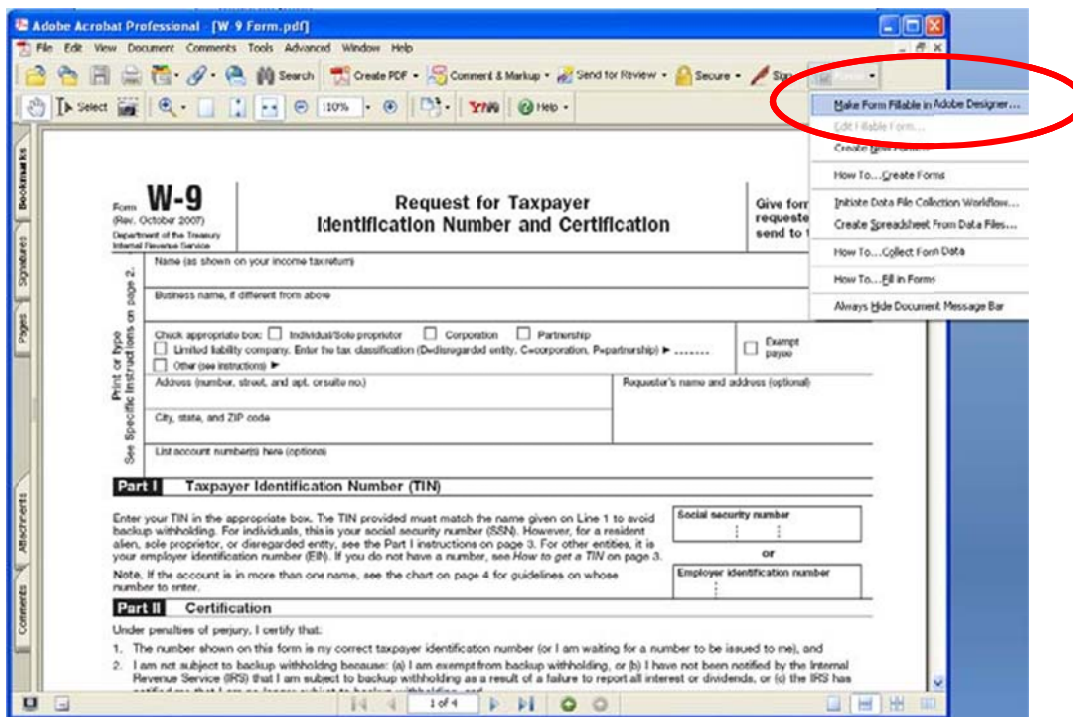


The new tables are now created for the database.

4. Template Setup in Adobe Designer

Note: The template can be setup in any PDF editing software capable of creating fillable PDF forms. The following are directions on how to setup the template in Adobe Designer.

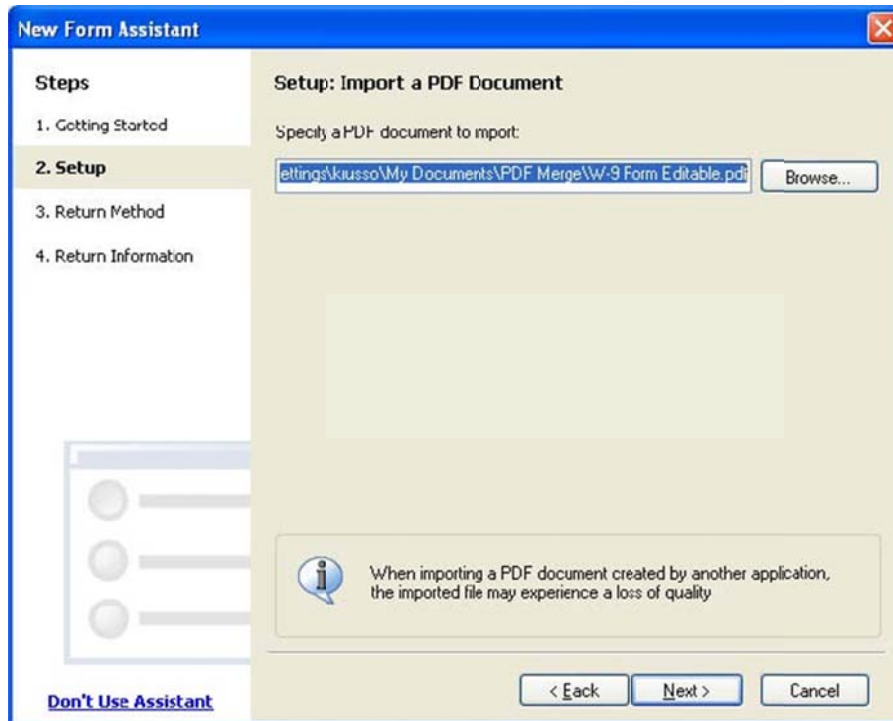
- A. Open the PDF form you would like to merge
- B. In the upper right corner of Adobe, click on “Forms”
- C. Select “Make Form Fillable in Adobe Designer” Note: This option will not be available if the form is locked. One way around this is to print the form, scan it to your computer, and save it as a PDF. Note: After this option has been selected the first time, “Edit Fillable Form” becomes available for selection and is a much faster way to get into Adobe Designer.



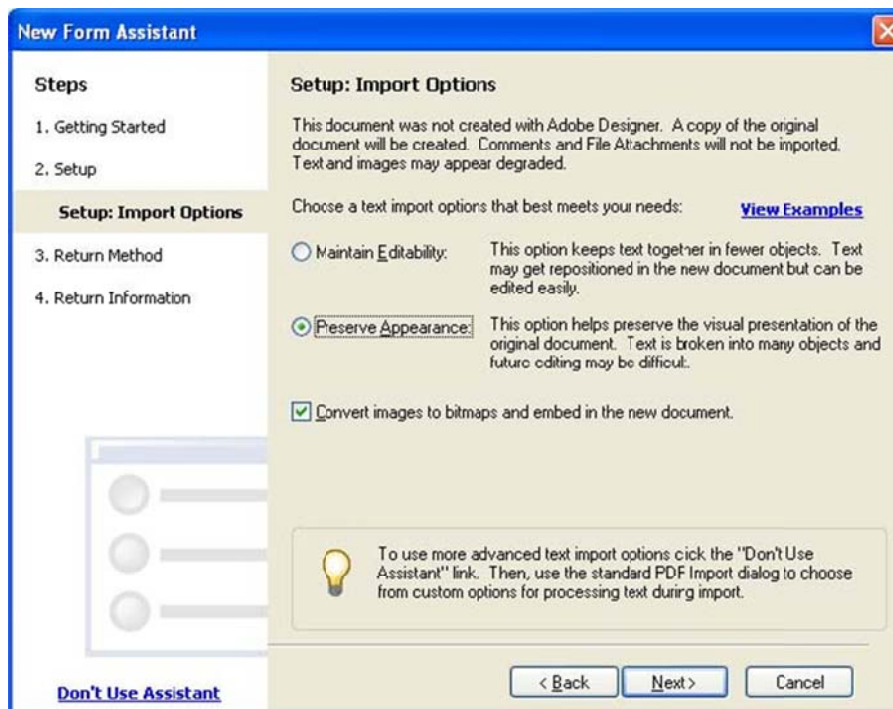
- D. A box will pop up, select “OK”



- E. After about 15 seconds (depending on your computer) the New Form Assistant window will pop up. Double check that the form you want to merge is specified and select “Next”



- F. Select either “Maintain Editability” or “Preserve Appearance”. Please read the descriptions before making your choice. Then select “Next”



G. Select “Fill then Print” as the Return Method and select “Next”

The screenshot shows the 'New Form Assistant' dialog box with the 'Return Method' step selected. The 'Steps' list on the left includes: 1. Getting Started, 2. Setup (with a sub-item 'Setup: Import Options'), 3. Return Method (highlighted), and 4. Return Information. The 'Return Method' section contains four radio button options: 'Fill then Submit', 'Fill then Submit/Print', 'Fill then Print' (which is selected), and 'Print'. Each option has a descriptive text. Below the options is an information icon and a note about Adobe Reader compatibility. At the bottom are buttons for '< Back', 'Next >', and 'Cancel'.

New Form Assistant

Steps

1. Getting Started
2. Setup
Setup: Import Options
- 3. Return Method**
4. Return Information

Return Method

Select the method which best describes how the form will be distributed and how the form will be returned:

- ☐ Fill then Submit - The form is filled electronically, printed, then the data is returned electronically (e.g. email).
- ☐ Fill then Submit/Print - The form is filled electronically, the data can be returned electronically or the form can be returned manually (e.g. email, fax, postal mail).
- ☒ Fill then Print - The form is filled electronically, printed, then returned manually (e.g. fax, postal mail).
- ☐ Print - The form is filled by hand then returned manually (e.g. fax, postal mail).

Form fillers using Adobe Reader will not be able to save a copy of the form with the data they entered. However, they can return their data to you if a Submit button is included in your form.

< Back Next > Cancel

H. Select “Finish”

The screenshot shows the 'New Form Assistant' dialog box with the 'Return Information' step selected. The 'Steps' list on the left includes: 1. Getting Started, 2. Setup (with a sub-item 'Setup: Import Options'), 3. Return Method, and 4. Return Information (highlighted). The 'Return Information' section is titled 'Return Information: Fill then Print' and contains three paragraphs of text. Below the text is a large empty rectangular box. At the bottom are buttons for '< Back', 'Finish', and 'Cancel'.

New Form Assistant

Steps

1. Getting Started
2. Setup
Setup: Import Options
3. Return Method
- 4. Return Information**

Return Information: Fill then Print

You specified that you want form fillers to fill in the form in Adobe Reader or Adobe Acrobat, print it, and then return it by postal mail or fax.

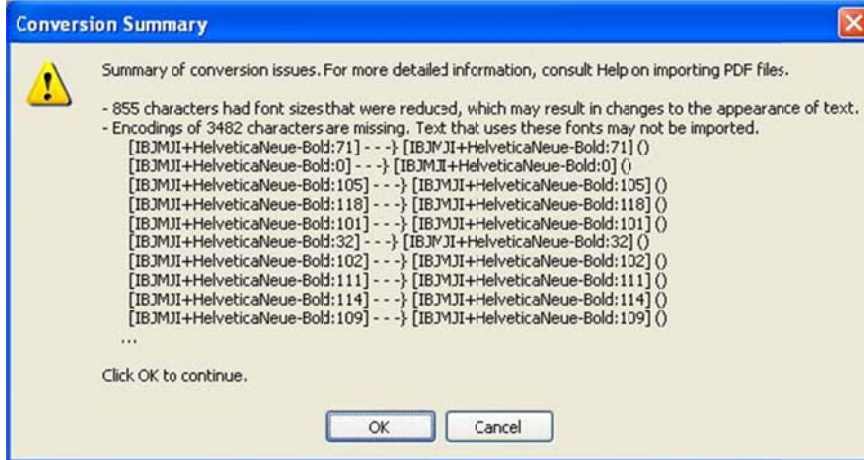
Note: Form fillers using Reader will not be able to save an electronic copy of their form with their data in it.

A Print button will be placed on your form automatically.

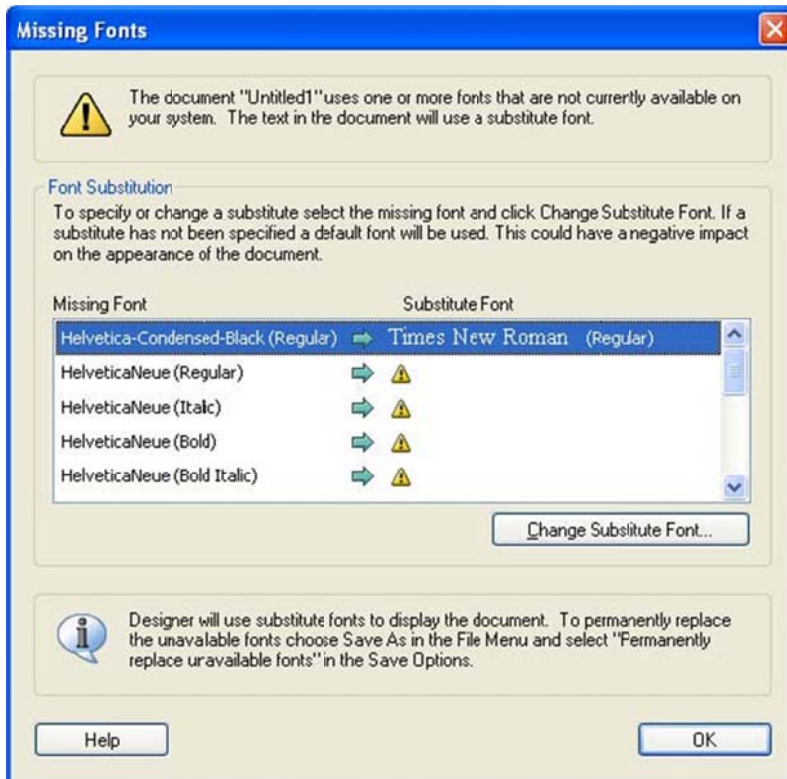
Remember to include a mailing address and/or fax number in your form.

< Back Finish Cancel

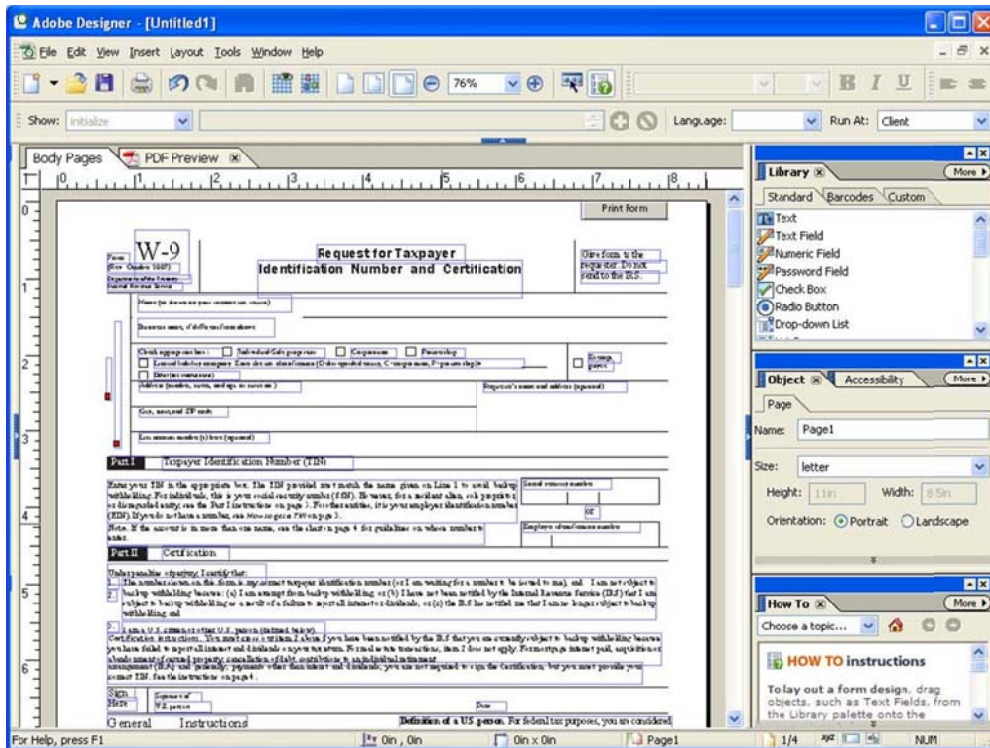
- I. A Conversion Summary box will pop up, Select "OK"



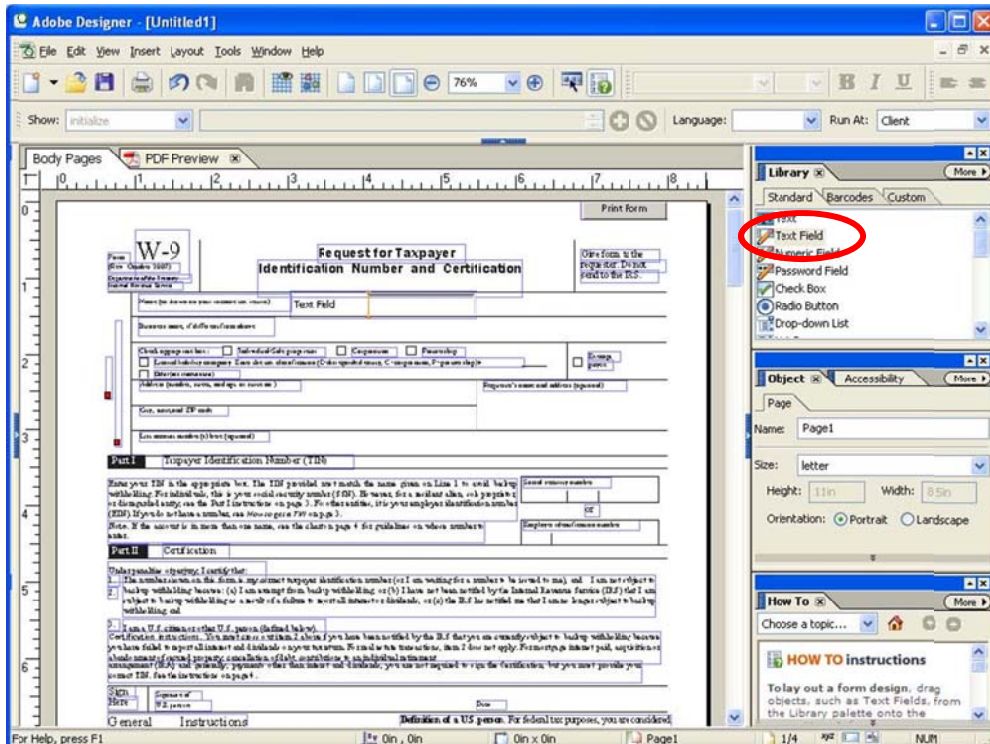
- J. A Missing Fonts window will pop up if the fonts are not available in the Adobe Designer. If this window appears, double click on each of the fonts with a yellow exclamation point next to it. Select an available font to replace the original font. After all the fonts have been selected, click "OK". Note: when choosing a font, it is best to choose a common font which will be available on everyone's computer.



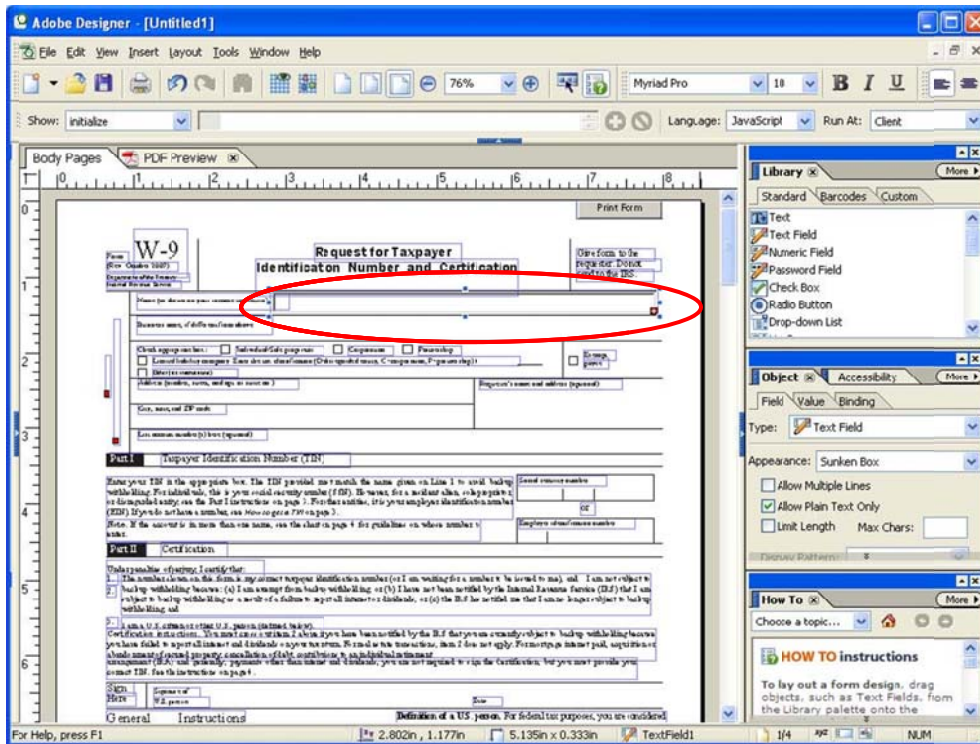
- K. Check the entire document and adjust any blue text boxes which are not in the correct place.



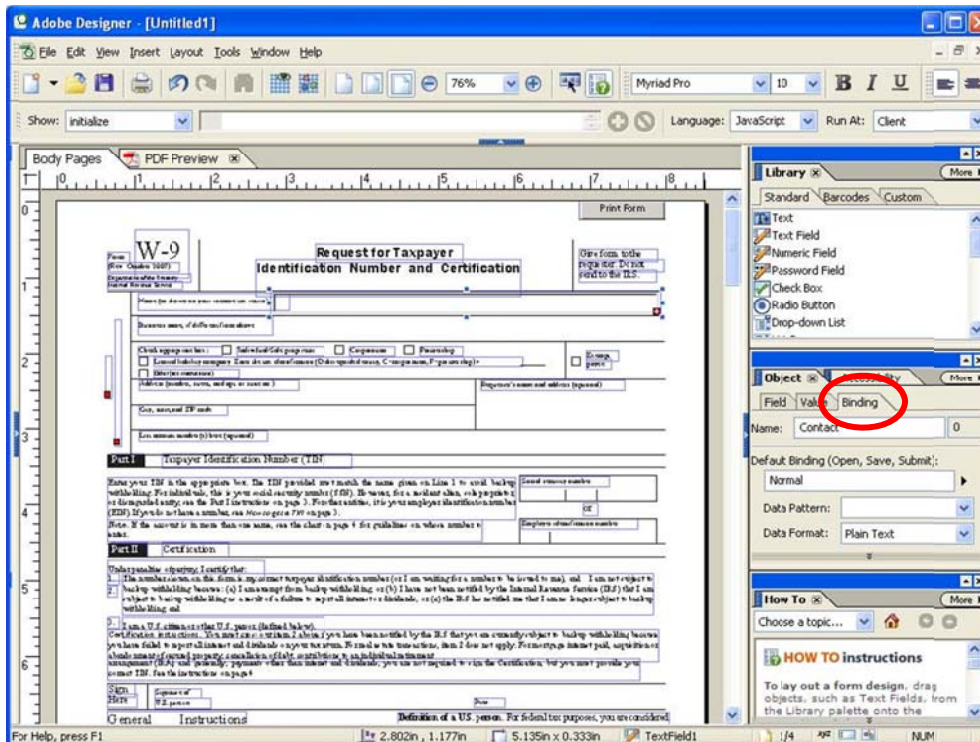
- L. Click on "Text Field" in the menu on the right and drag it to where you would like a text field. Note: KCI PDF Merge supports check boxes, text boxes, and drop down lists.



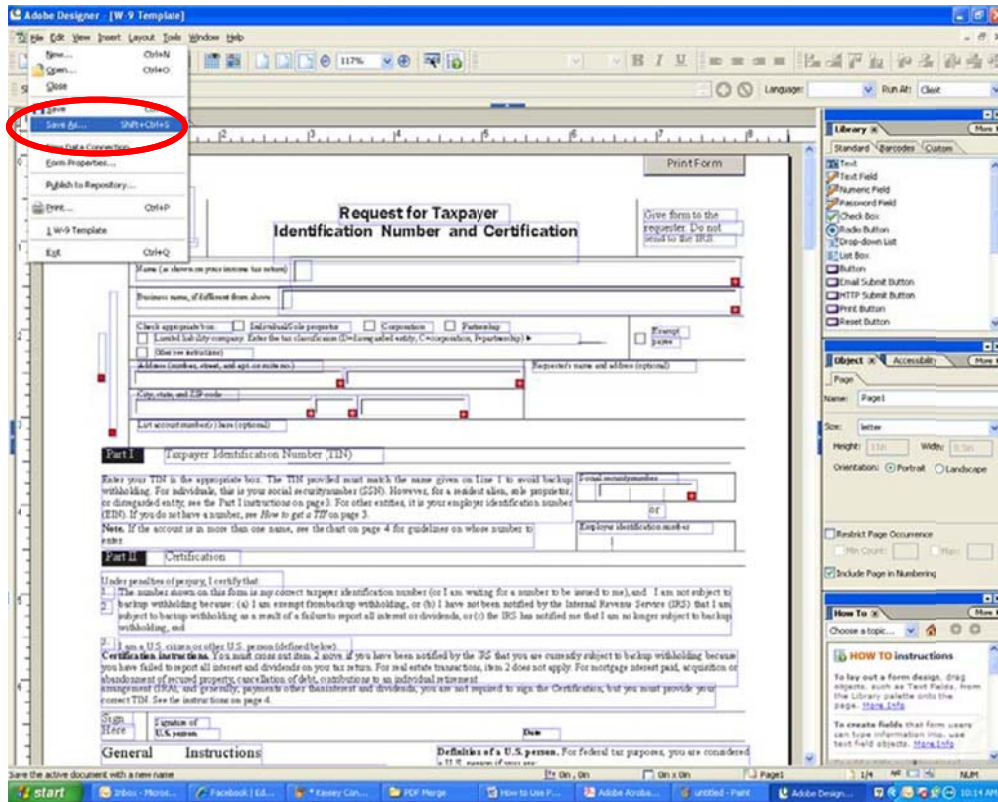
- M. Delete the words “Text Field” out of the box and slide the orange line all the way to the left. Resize and position the box to your preference.



- N. Click on the “Binding” tab in the menu on the right and rename the box so it can be matched with a field in ACT!.

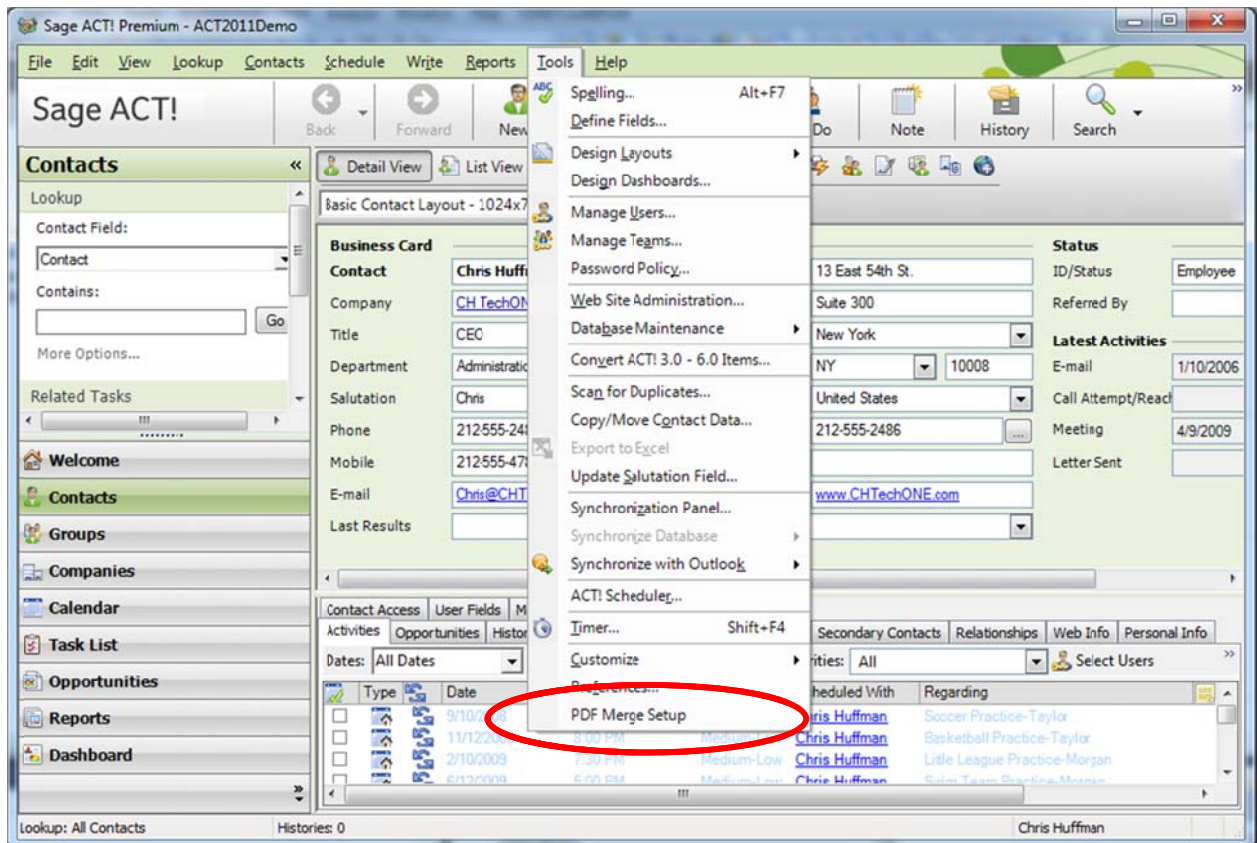


- O. Repeat steps I through n until all the fields have been inserted, resized, and named. Once the form is complete, save the file and this will be your template to merge in ACT!

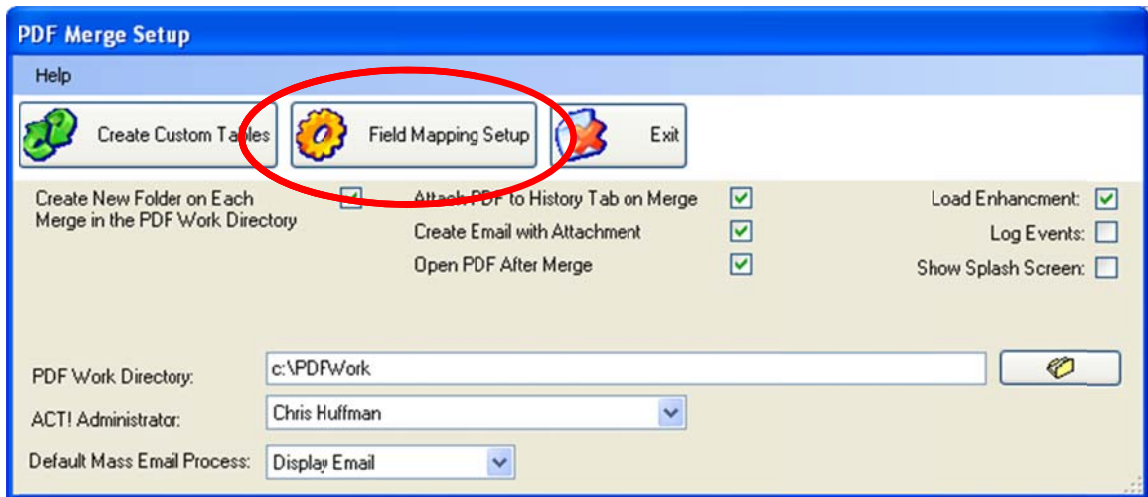


5. KCI Setup – In ACT!

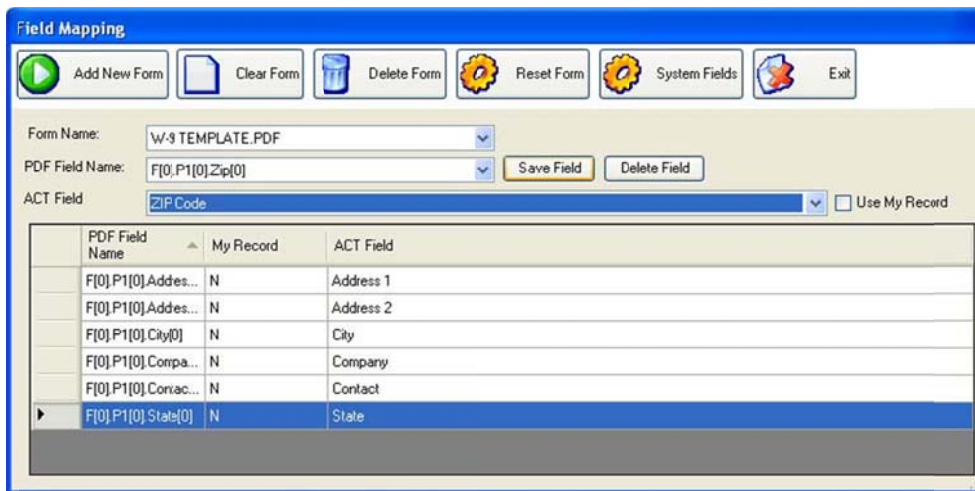
- A. In the menu bar under “Tools” select “PDF Merge Setup”



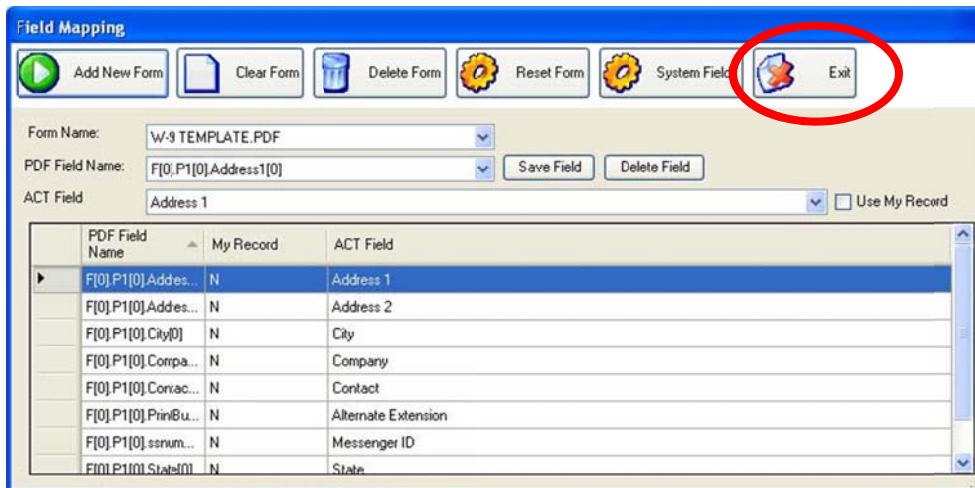
- B. Select the preferences you would like and find the PDF Work Directory. Then click on “Field Mapping Setup”. **See the index for explanations of all options and terms.** Note: If the ACT! Administrator is selected, the PDF template will be available for everyone who has PDF Merge installed on their computer, and has the same ACT administrator.



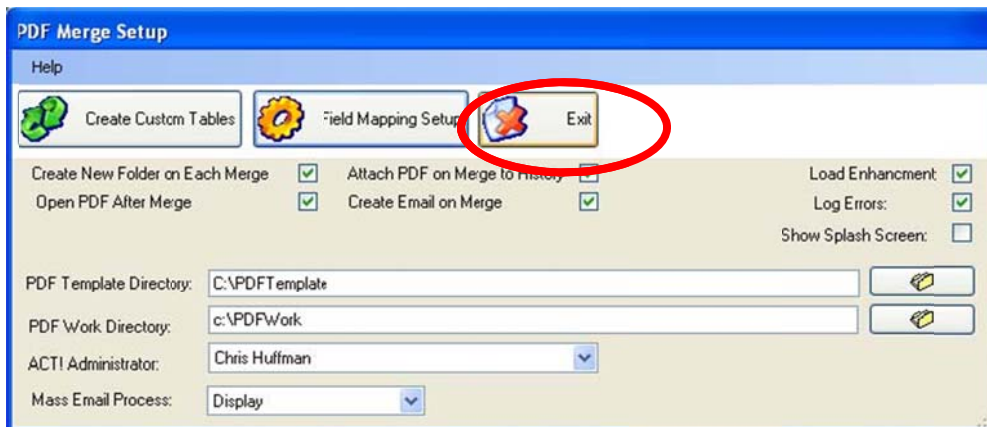
- C. Select the template you would like to setup. Select the PDF Field Name, match it to the ACT Field and then click “Save Field”. Repeat this step for all the fields on the PDF template.



- D. Select “Exit”

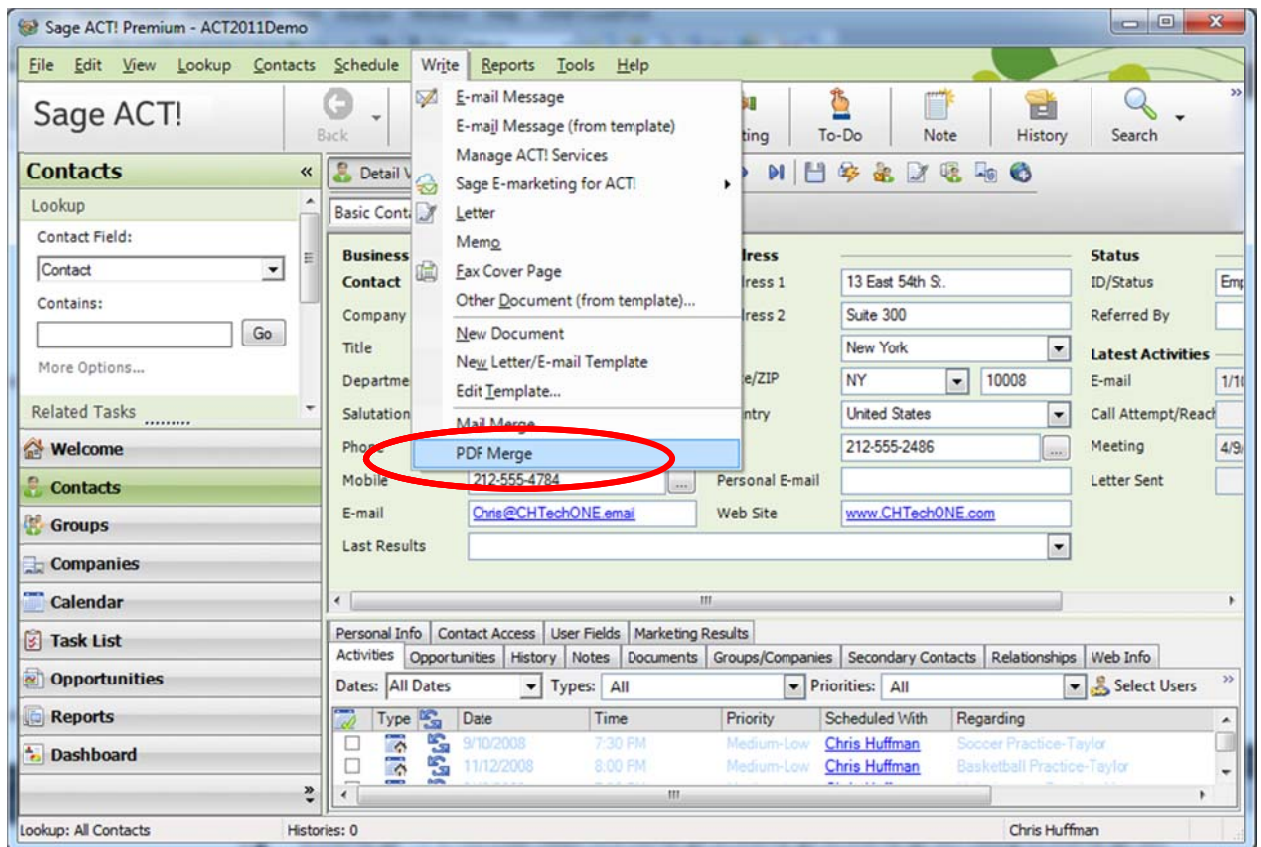


E. Select "Exit"

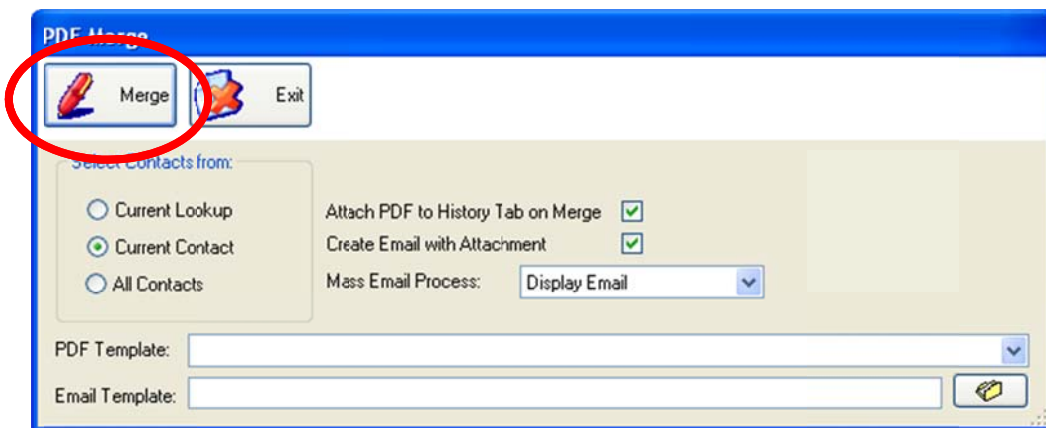


6. PDF Merge – In ACT!

A. In the menu bar under "Write" select "PDF Merge"



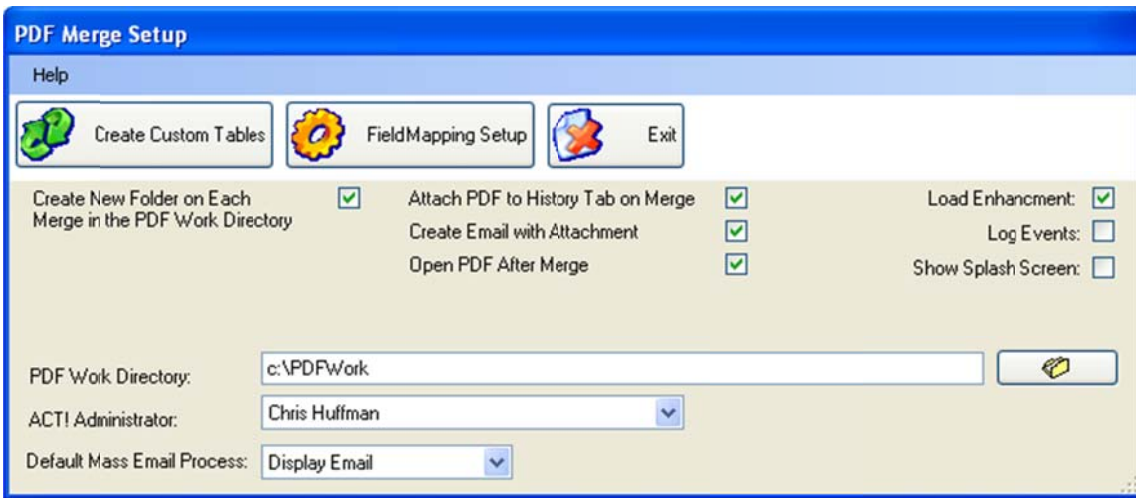
- B. Select your preferences, find the PDF form to merge, and click “Merge”. [See the index for explanations of all options and terms.](#)



- C. A window will popup telling you that the merge was successful. Click “OK”



6. Index



PDF Merge Setup:

Setup the PDF templates and default preferences for the PDF Merge.

ACT! Administrator

If the administrator of the ACT! database is selected, everyone who uses ACT! will have access to the PDF template being setup. If a user other than the administrator is selected, only that user will have access to the PDF template being setup.

Attach PDF to History Tab on Merge

The merged PDF form (completed using the contact's information in ACT!) will be attached to the contact's History tab in ACT!.

Create Custom Tables

The create custom Tables button will create the tables needed in your ACT! software that are required to store user preferences, mappings for the PDF merge, and other settings that are required to use the software.

Create Email with Attachment

An email to the contact will be created with the merged PDF form (completed using the contact's information in ACT!) as an attachment to the email.

Create New Folder on Each Merge in the PDF Merge Directory	When the ACT! data is merged into a PDF template the document is saved in the work directory. From this directory the program will retrieve the filled out document based on the options the user specified. Ex. Email, Open after Merge, Attach to history. To make it easier from a management standpoint we give you the option to create a folder each time a merge occurs so that this directory is neatly maintained. If this box is checked a folder will be created with the document name and the date and time stamp of the merge. The folder will contain all the documents that were merged based on the users selection of current lookup, current contact, all contacts.
Default Mass Email Process	If "Create Email with Attachment" is selected, then the default email process selected in the PDF Merge Setup will appear as the default in the PDF Merge window as the "Mass Email Process".
Display Email	If "Create Email with Attachment" is selected, then the email will display with the merged PDF form attached (completed using the contact's information in ACT!). This option is not ideal when sending out multiple emails as the computer will be overwhelmed by several windows trying to popup at once.
Exit	Exit PDF Merge Setup.
Field Mapping Setup	Setup the PDF template by matching the fields in the PDF form to the fields in ACT!.
Load Enhancement	Even though the enhancement is installed the user can turn off the enhancement and prevent it from loading in ACT!. If this checkbox is checked the enhancement is enabled.
Log Events	For troubleshooting measures every event that would be needed to trouble shoot the software can be logged into the windows event viewer. Normally this box is not checked, but in a trouble shooting situation KCI may ask you to check this box so we can gather important information regarding the events that occurred in the software.
Open PDF After Merge	The merged PDF form (completed using the contact's information in ACT!) will open after the merge is complete.

PDF Work Directory	<p>Every merge performed with our software needs to be saved so that the document can be emailed, attached to a contact record, and/or opened upon completion. The directory can be a local directory, which is recommended, but in a network environment the folder could be on a shared drive that everyone has access to view. The user must have full control for permissions to this folder. This directory can be set to the Windows Temporary folder if you would like windows to handle the purging of the folder periodically. This folder is only used temporarily and most users would be attaching the pdf to the contact record and can retrieve the document here.</p>
Save Email As Draft	<p>If "Create Email with Attachment" is selected, then the email will be saved as a draft in Outlook with the merged PDF form attached (completed using the contact's information in ACT!). This option is best used when sending out multiple emails which you would like to view before sending.</p>
Send Email	<p>If "Create Email with Attachment" is selected, then the email will be sent with the merged PDF form attached (completed using the contact's information in ACT!) without displaying the email first. If you would like to proof read the email and check it for mistakes before sending it, do not select this option.</p>
Show Splash Screen	<p>If this box is checked the user will see the PDF merge splash screen everytime they open ACT!. This can be disabled by unchecking this box.</p>

PDF Field Name	My Record	ACT Field
F[0].P1[0].Address...	N	Address 1
F[0].P1[0].Address...	N	Address 2
F[0].P1[0].City[0]	N	City
F[0].P1[0].Compa...	N	Company
F[0].P1[0].Contac...	N	Contact
F[0].P1[0].State[0]	N	State

Field Mapping:

Map the fields in the PDF form to the fields in ACT! which contain the data you would like to use to fill in the form.

ACT Field

The field name within the ACT! database.

Add New Form

Add a new PDF fillable form to the PDF Merge Software so it can be setup and the fields can be mapped.

Clear Form

Clear or unselect the PDF Field Name and ACT Field

Delete Field

This will delete the selected mapped field from the list at the bottom of the window. The fields can then be remapped.

Delete Form

This process will delete all mappings for the form and/or the entire form completely. After selecting "Delete Form" you will first be prompted if you want to delete all mapping for this form. If Yes, this will clear all fields that have been mapped and are listed in the bottom part of the window. Next you will be prompted if you want to delete the form. If Yes, this will delete the form from the PDF Merge software. In order to get the form back into the software once deleted, you must select "Add New Form". The mapping can be deleted without deleting the form completely.

Exit

Exiting from the "Field Mapping" will take you back to the "PDF Merge Setup".

Filter PDF Field Names	If this is selected, once the PDF field has been mapped/saved it will be removed from the drop-down list of "PDF Field Names". This is a great tool to use when mapping a form with many fields.
Form Name	The name of the PDF form you would like to map the fields for.
PDF Field Name	The field name within the PDF fillable form.
Reset Form	This process will scan the document selected for all PDF variables and reset them to the correct ACT! field, provided the field in ACT! is the same name as the one in the PDF form. After selecting Reset Form you will be prompted to make sure you want to complete the process. The main reason for performing this routine would be if a database was restored in ACT! using the restore as functionality built into the sage software product.
Save Field	Save the PDF Field Name and ACT field which have been matched. After being saved, they will appear in the list at the bottom of the window. The PDF field has now been "mapped".
System Fields	Some word templates may not map correctly when doing a merge to email. To account for this we provide this area to map a variable in the Word ADT template to the ACT! field if it doesn't map automatically. By default this should not need to be manipulated, however in some cases where extreme customization of the software has occurred, this is required to get the merge to function correctly.
Use My Record	The user's information will be put in the field instead of the contact's information.

System Fields

Clear Form Exit

ACT Field Save Field Delete Field Reset

System Field Name:

System Field Name	Full ACT Field	ACT Table	ACT Field	ACT Field

System Fields:

Some word templates may not map correctly when doing a merge to email. To account for this we provide this area to map a variable in the Word ADT template to the ACT! field if it doesn't map automatically. By default this should not need to be manipulated, however in some cases where extreme customization of the software has occurred, this is required to get the merge to function correctly.

ACT Field	The field name within the ACT! database.
Clear Form	Removes all data from the entry fields and reloads the grid.
Delete Field	Deletes the system field mapping for the currently selected item in the grid.
Exit	Exiting from the "System Fields" will take you back to "Field Mapping".
Reset	There are several fields that are known to be issues with word ADT templates. The reset button will remove all fields that are setup and add in all the fields that we know cause issues out of the box. This button resets to the factory defaults.
Save Field	Saves the ACT! field and system field name to the system and displays the information in the grid.
System Field Name	The field name from the word document that is not mapping correctly when generating an email.

<u>PDF Merge:</u>	Merge the PDF form using the contact data in ACT!.
All Contacts	A PDF form will be merged for each contact within the entire ACT! database. If there are 200 contacts in the ACT! database, 200 PDF forms will be merged each completed with a different contact's information from ACT!.
Attach PDF to History Tab on Merge	The merged PDF form (completed using the contact's information in ACT!) will be attached to the contact's History tab in ACT!.
Create Email with Attachment	An email to the contact will be created with the merged PDF form (completed using the contact's information in ACT!) as an attachment to the email. When selecting this option, you must also select the "Mass Email Process".
Current Contact	A PDF form will be merged for the current contact displayed in ACT!.
Current Lookup	A PDF form will merge for each contact in the current lookup. If there are 10 contacts in the current lookup, 10 PDF forms will be merged each completed with a different contact's information from ACT!.
Display Email	If "Create Email with Attachment" is selected, then the email will display with the merged PDF form attached (completed using the contact's information in ACT!). This option is not ideal when sending out multiple emails as the computer will be overwhelmed by several windows trying to popup at once.

Email Template	The email template you would like to use for the body of the email which will have the merged PDF form as an attachment (completed using the contact's information in ACT!). If an email template is not selected, the email will be created as blank.
Exit	Exit the PDF Merge.
Mass Email Process	If "Create Email with Attachment" is selected, you must select what you would like done with the email from the drop-down list provided.
Merge	Merge the PDF form selected under PDF Template using the contact data in ACT!.
Open PDF After Merge	The completed PDF form will display on your computer after the merge is complete.
PDF Template	The PDF form you would like to merge/complete with the contact's information in ACT!.
Save Email As Draft	If "Create Email with Attachment" is selected, then the email will be saved as a draft in Outlook with the merged PDF form attached (completed using the contact's information in ACT!). This option is best used when sending out multiple emails which you would like to view before sending.
Send Email	If "Create Email with Attachment" is selected, then the email will be sent with the merged PDF form attached (completed using the contact's information in ACT!) without displaying the email first. If you would like to proof read the email and check it for mistakes before sending it, do not select this option.