

## EasyPDF™ Basic CRM Form Features Help Menu

- ◆ Click the Black EasyPDF™ menu icon in the upper top left-hand corner of the form to open and preview a custom popup menu providing a number of advanced form features to simplify and facilitate using the form.
- ◆ Click the 'Highlight Fields' menu item provided to toggle active form fields on/off. In start mode, the only active or highlighted field is the 'name' field positioned at the top of the form directly beneath 'Start Mode' in red text while all other form fields remain inactive until a CRM record has been added or selected placing the form in 'edit' mode.
- ◆ The 'Help' and 'About' menu items are self-explanatory.
- ◆ When the form first opens, the cursor automatically appears inside a blank 'name' field ready for the user to either enter/type a name for creating a new CRM record or click the drop-down arrow on the right to select an existing CRM record by name to edit, view, or delete.
- ◆ To add a new CRM record once you are done viewing or editing a CRM record, simply click the Black EasyPDF™ menu icon to display the custom popup menu once again and select 'Reset Form' to return to start mode.
- ◆ Backup and restore password records from a previous point in time (Note: The Restore Data menu item is notably disabled (grayed out) when EasyPDF™ CRM Form is first open until a backup is performed).
- ◆ The Copy Data menu item is initially disabled (grayed out) and activated on a onetime basis to transfer data from an older to an updated version of EasyPDF™ CRM Form with one click of the mouse.
- ◆ The Green colored button serves to activate a website link (Note: The website address field requires a website address (URL) beginning with either https:// or http:// for security reasons in order to enable the link. Also note, this is not a required field and may be left blank.).
- ◆ The form provides a number of predefined combo box drop-down fields that are populated transparently by the user over time in using the form. In short, predefined drop-down field items are essentially created and retrieved from one or more CRM records that presently reside on the form and contain a predefined text item for that particular field. If and when a CRM record containing a predefined text item is deleted from the form whereby no other remaining CRM record contains the predefined text item associated with a record that has been deleted, the text item ends up being removed from the predefined list of text items provided when the form is saved. This in turn serves to ensure a fresh updated list of predefined text items most often entered/preferred by an end user over time.
- ◆ Not unlike EasyPDF™ Password Manager, you must save EasyPDF™ CRM Form after each and every session when prompted by closing the form to ensure all/any changes made to the CRM records residing in form during a session get saved to the hidden data field stored inside the form or the data will not be present for the next session.
- ◆ EasyPDF™ CRM Form is solely designed/intended for use on a Windows 10/11 or compatible Apple desktop/laptop computer running Adobe Reader version 2015 or higher to preview and use all form features provided and is not designed/intended for use on a mobile device.
- ◆ An internet connection is required in order to browse the internet and visit sites such as Adobe to download the free Adobe Reader as well as add Adobe's free PDF password protection option to EasyPDF™ CRM Form.
- ◆ For added convenience and 24/7 access, EasyPDF™ CRM Form can be copied to a password protected USB device using BitLocker (provided with Windows 10 Pro) to prevent anyone other than the user from accessing and retrieving information from EasyPDF™ CRM Form when stored on a USB device that has become lost.
- ◆ For double added security, the form provides a link to obtain Adobe's free PDF password protection option in addition to your creating a master password or PIN (if you haven't already done so) for the desktop/laptop computer you are using to prevent unauthorized access to your computer and EasyPDF™ CRM Form.
- ◆ EasyPDF™ CRM Form is guaranteed to be free from popup ads, malware, and viruses.
- ◆ EasyPDF™ CRM Form provides a very small footprint to deliver superior speed/performance each and every time you use it.