

# GoldMine Plus for Adobe Acrobat

Version 7.0

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# Introduction

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## Welcome to GoldMine Plus for Adobe Acrobat

This guide contains installation, setup and configuration information for linking Adobe Acrobat 7 with GoldMine Plus Version 7.

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**Note:** Goldmine Plus 7 is only compatible with Adobe Acrobat 7. If you are trying to configure Adobe Acrobat with GoldMine Plus, you must unintstall any previous version of Acrobat, and install Adobe Acrobat 7.

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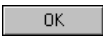

## About this Guide

The *GoldMine Plus for Adobe Acrobat* guide is designed to enable you to use an Adobe Acrobat 7 link from your GoldMine Plus application.

## Audience and Expertise

The material assumes the GoldMine administrator has already installed and is familiar with GoldMine and Adobe Acrobat. It also assumes the user has a basic understanding of databases and the Microsoft Windows operating system.

## Document Conventions

Example	Description
<b>File&gt;&gt;Print</b>	Menu bar commands (in this example, select <b>File</b> on the menu bar, then select <b>Print</b> in the drop-down menu)
The <b>Select a Data Source</b> dialog box appears.	Dialog boxes and menu items in bold
<b>OK</b> 	Button names
<b>Note</b>	Additional information
<b>CAUTION/WARNING</b>	Critical information to prevent functionality or data loss
	Reference to another topic or resource

## GoldMine Resources

Documentation to help you understand and use GoldMine is provided in multiple forms and locations.

### GoldMine Manuals

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- **What's New in GoldMine:** This guide provides an overview of the new features of each release.
- **GoldMine Installation Guide:** This guide provides installation, setup, and integration instructions for GoldMine.
- **Using GoldMine:** This guide provides an introduction to the main features of GoldMine.
- **Administrating GoldMine:** This guide provides an introduction to the main concepts and features of GoldMine administration.

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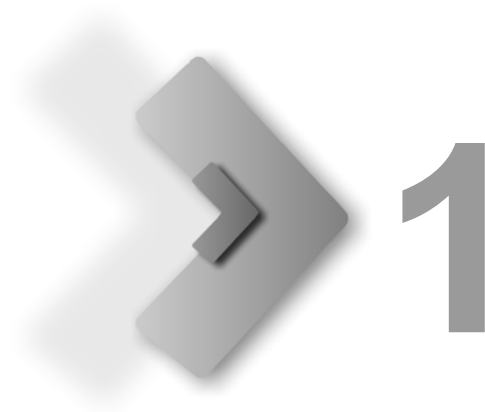
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# GoldMine Plus for Adobe Acrobat

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## About this chapter

This chapter contains the following topics related to configuring the Adobe Acrobat 7 link with GoldMine Plus for Adobe Acrobat:

- "System Requirements for GoldMine Plus for Adobe Acrobat" on page 1-2
- "Overview for Installing Adobe Acrobat 7 Link with Goldmine Plus for Adobe Acrobat" on page 1-2
- "Installing the GoldMine 7 Link for Adobe Acrobat 7" on page 1-2
- "Executing the Adobe Link in GoldMine" on page 1-12
- "Opening an Acrobat Template from Info Center" on page 1-15
- "Adding Additional GoldMine Fields to Adobe Forms" on page 1-16
- "Adding GoldMine Macros to Adobe Forms" on page 1-18
- "To Add GoldMine Fields or Macros to Adobe Forms" on page 1-19

## System Requirements for GoldMine Plus for Adobe Acrobat

To configure GoldMine Plus for Adobe Acrobat, you must have the following applications installed on each machine that will be employing the functionality:

- Adobe Acrobat 7
- Adobe Designer 7

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**Note:** Goldmine Plus for Adobe Acrobat is only compatible with Adobe Acrobat 7. If you are trying to configure Adobe Acrobat with GoldMine Plus, you must uninstall any previous version of Acrobat, and install Adobe Acrobat 7.

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## Overview for Installing Adobe Acrobat 7 Link with Goldmine Plus for Adobe Acrobat

There are three procedures that must be executed in order, when configuring Adobe Acrobat link functionality for GoldMine Plus for Adobe Acrobat. These three procedures are outlined below.

- **Installation.** You must install GoldMine Link for Adobe Acrobat.
- **Design.** This portion of the setup is done within Adobe Designer 7.0 which you can find under Programs in the same directory as Adobe Acrobat 7.
- **Execution.** This portion of the setup you perform in the GoldMine Plus application.

## Installing the GoldMine 7 Link for Adobe Acrobat 7

To enable the Adobe Acrobat Link for GoldMine you must download the link from the FrontRange Solutions Support Website.

<http://support.frontrange.com>.

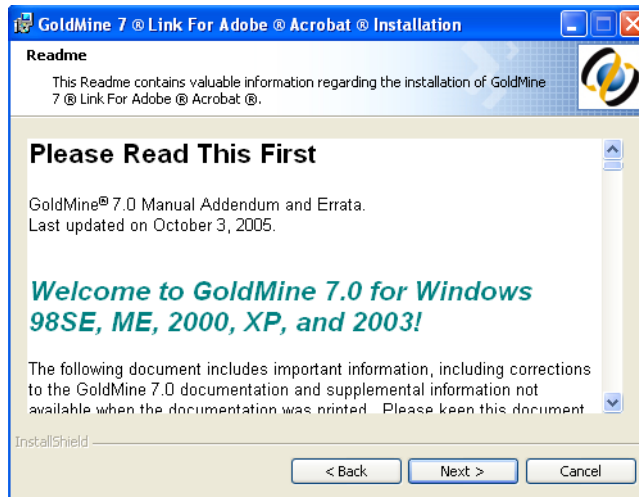
1. Double-click gmadobe.exe. The Welcome page appears while InstallShield runs.



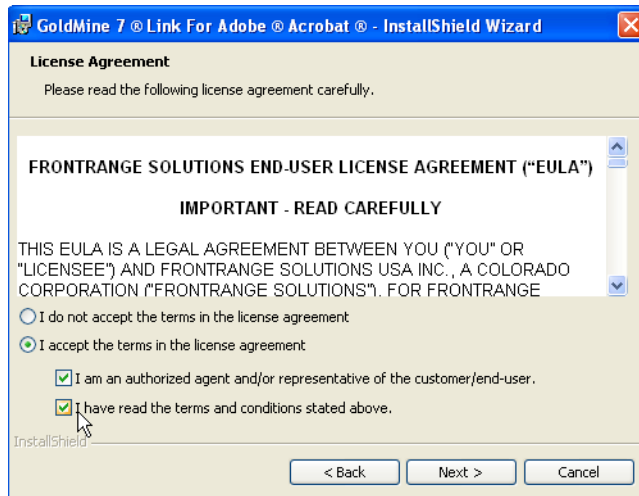
The InstallShield Wizard automatically appears.



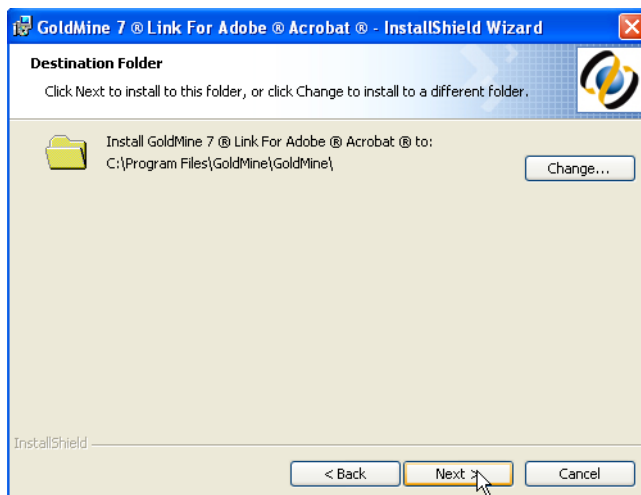
2. Click **Next**. The Readme appears.



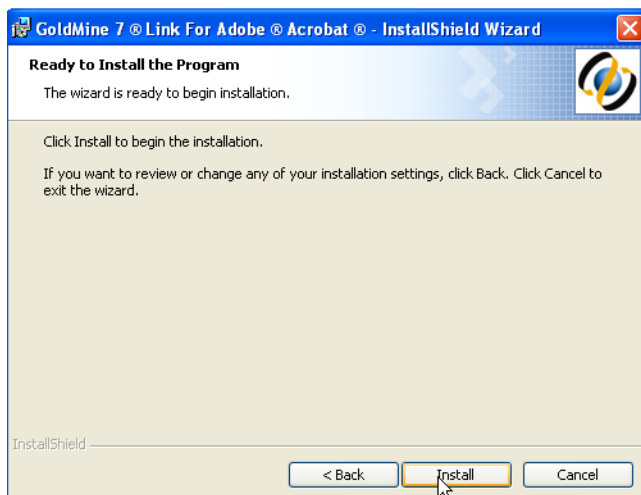
3. Review the information contained in the Readme and click **Next**. The License Agreement page appears.



4. Accept the agreement along with the two agreements listed below it and click **Next**. The Destination Folder page appears.



5. Accept the default folder or browse to the desired directory, then click **Next**. The Ready to Install the Program page appears.



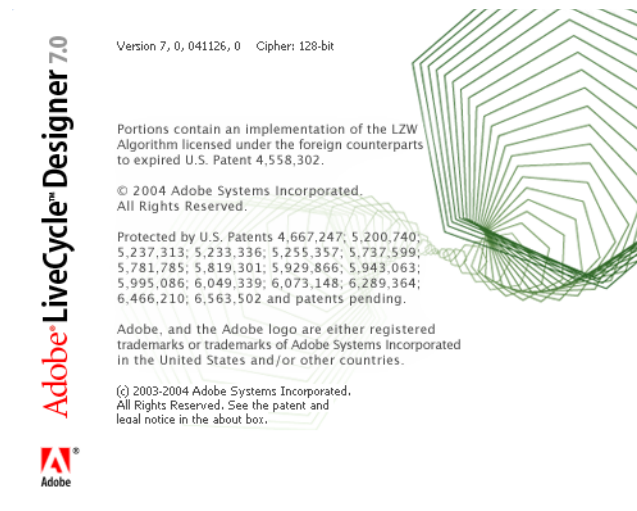
6. Click **Install**, then click **Finish** when the installation is complete.

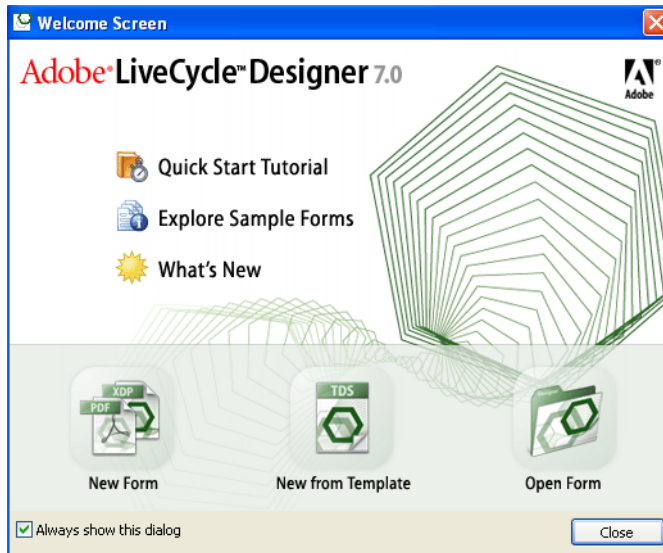
## Designing a Sample Template in Adobe Designer

You must now execute the design portion of the setup in Adobe Designer 7.0.

1. To open Adobe Designer choose **Start >> Programs >> Adobe Designer 7.0**.

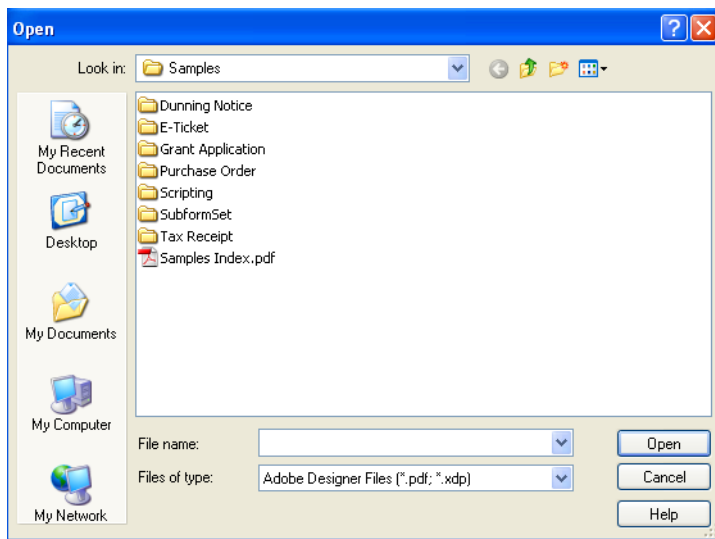
The Adobe Designer 7.0 Professional splash screen appears followed by the Welcome Screen.





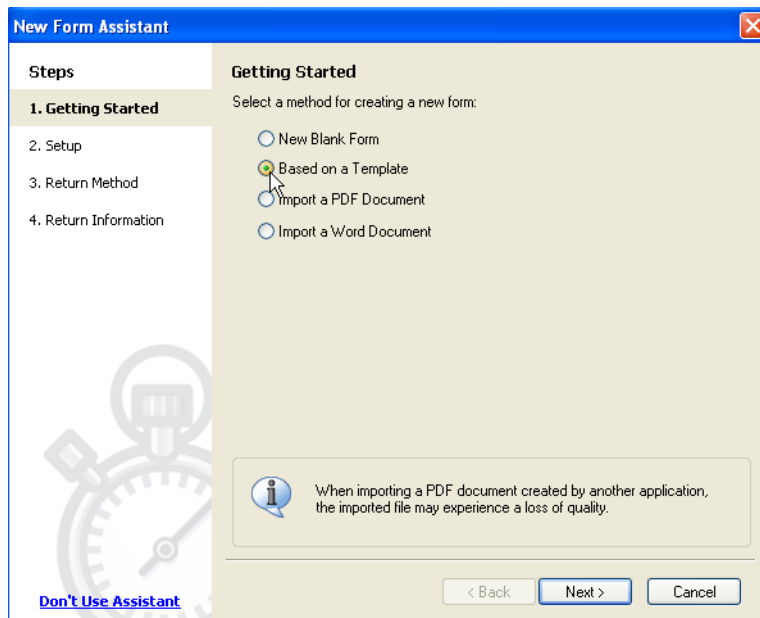
2. In the Welcome Screen, click **Explore Sample Forms**.

The Windows Explorer appears.



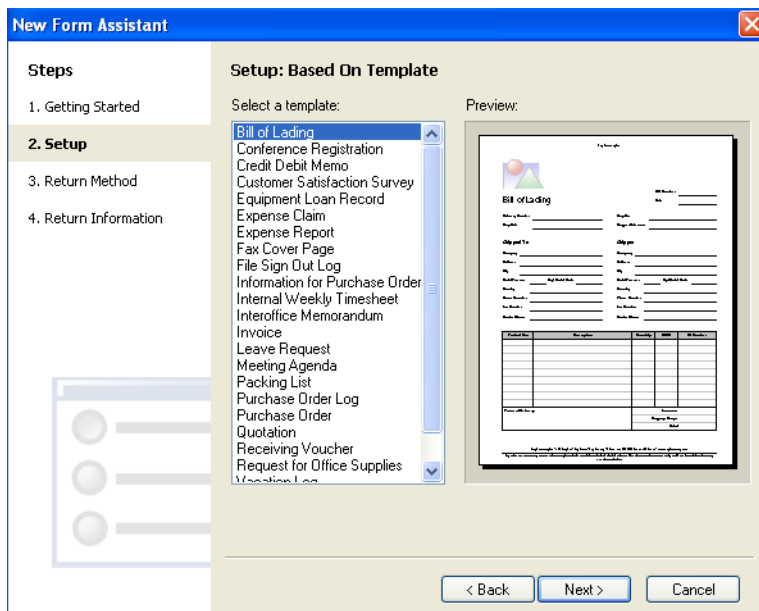
3. Navigate to any sample form. For example, navigate to **Samples >> Grant Application >> Forms**.
4. Select a form, right-click, and select **Copy**.
5. Open the copied file.
6. From the File menu, select **New**.

The New Form Assistant wizard appears.



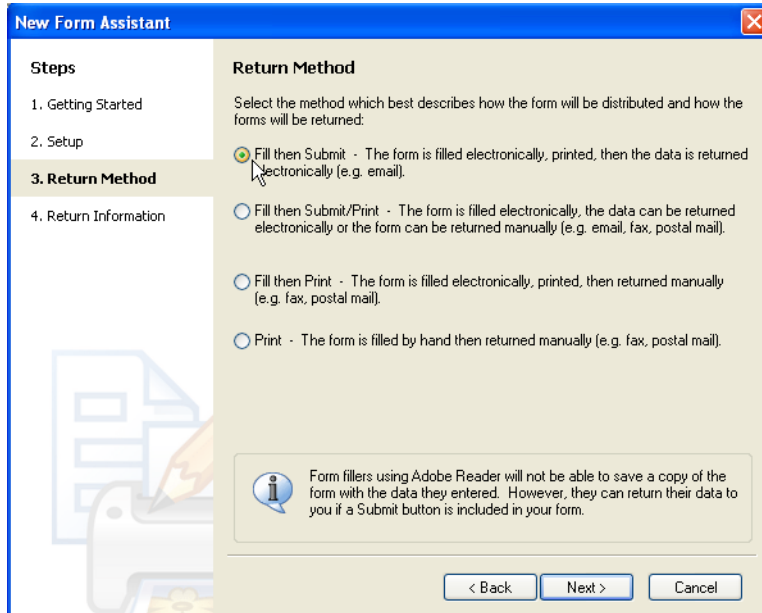
7. In the Getting started area, click **Based on a Template**, and click **Next**.  
The Setup page appears.





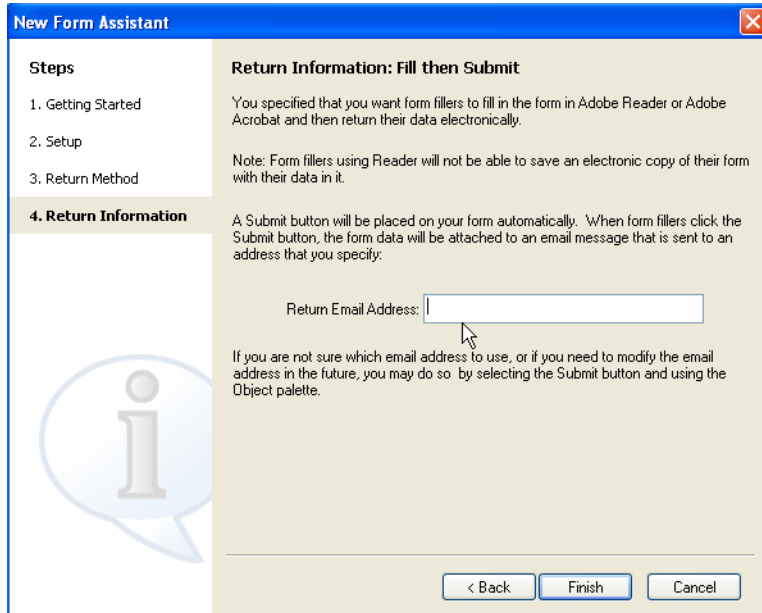
8. For this example, select **Bill of Lading** from the **Select a Template** window then click **Next**.

The Return Method window appears.



9. Select **Fill then Submit**, and click **Next**.

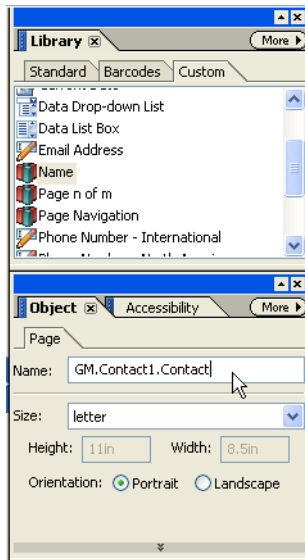
The Return Information window appears.



10. Enter an e-mail address in the text field, then click **Finish**.

The new form appears in the Adobe Designer.

11. In the Library window, as shown below, click the **Custom** tab, then single-click the **Name** object.
12. In the Name field of the Object window, type in the following:  
**GM.Contact1.Contact**



Adding this text string will allow the contact field in GoldMine to be added to the form.

For more information on additional GoldMine fields and macros that can be added to Adobe forms, see "Adding Additional GoldMine Fields to Adobe Forms" on page 1-16 and "Adding GoldMine Macros to Adobe Forms" on page 1-18. For an overview of creating new a new Adobe form with GoldMine fields, see "To Add GoldMine Fields or Macros to Adobe Forms" on page 1-19.

13. Click Save, and name the file **Test** or any memorable name, as you will later test the template in GoldMine.

## Executing the Adobe Link in GoldMine

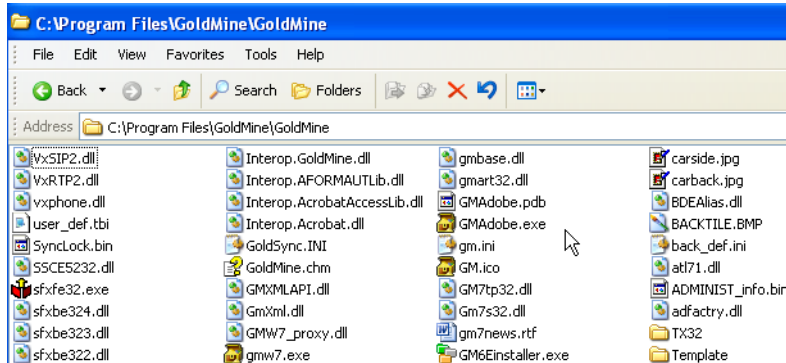
When you configure the GoldMine Plus for Adobe Acrobat link you will do so from the command line interface. This is for initial setup. Your users will not be required to use the command line.

To configure the link, perform the following steps.

1. Open the GoldMine application.

2. Navigate to the Goldmine Installation directory and find the .exe file called:

### GMAdobe.exe



3. Double click **GMAdobe.exe**. The Windows Command Line window appears.



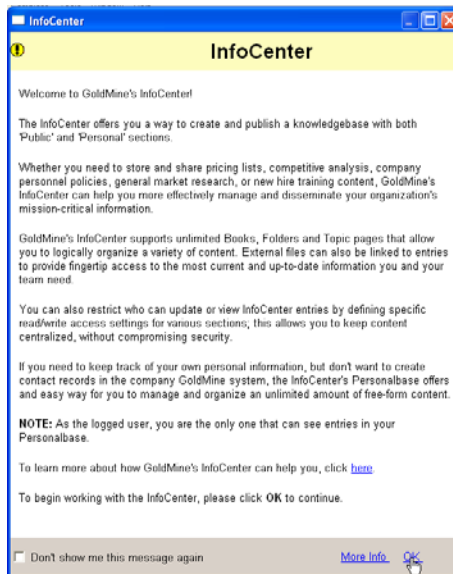
**Note:** The Command Line interface is only used in initial setup. Your users will work though GoldMine, not through the Command Line interface.

4. At the prompt, type the path to the Adobe Form you have previously created.

For example: C:\Documents and Settings\<YourUserName>\My Documents\Test.pdf

The **Test.pdf** file opens in Adobe Acrobat. If it does not open, check the path to ensure it was entered correctly.

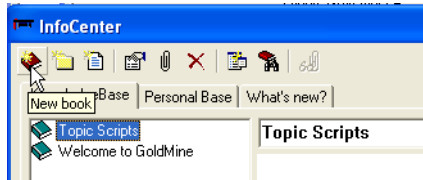
- From GoldMine, select **View >> InfoCenter**. The InfoCenter Welcome page appears.



- Click **OK**. The InfoCenter appears.

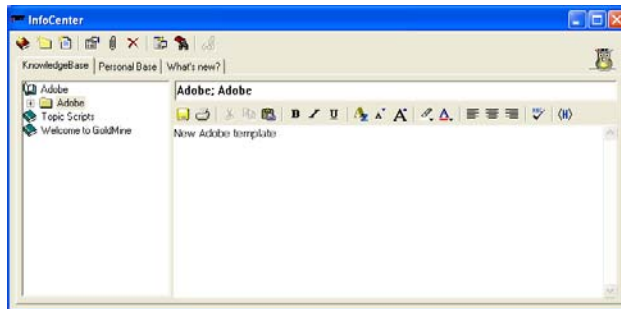


- Click the New Book icon as displayed below:

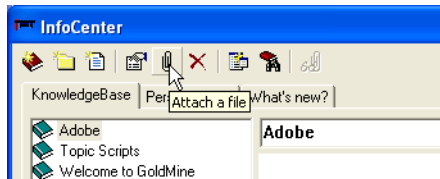


A new book appears in the Explorer window.

8. Name the new book **Adobe**, then create a new folder named **Adobe** by clicking the New Folder icon.



9. Click the **Attach** icon as shown below:



The sample template is now added to the InfoCenter. Repeat the steps above to add more templates to GoldMine.

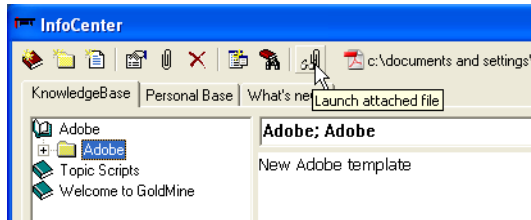
## Opening an Acrobat Template from Info Center

1. From GoldMine, select **View >> InfoCenter**.

The InfoCenter Welcome page appears.

2. Navigate to the Adobe folder containing the templates in InfoCenter.
3. Select the desired template in the window.

4. Click the Launch Attached File icon as shown below.



The attached template file appears.

## **Adding Additional GoldMine Fields to Adobe Forms**

The following table lists additional fields you may add to Adobe forms in Adobe Designer and have them reflected in GoldMine Plus. For instructions on adding macros which enable the placement of multiple fields, see "Adding GoldMine Macros to Adobe Forms" on page 1-18



GM.Contact1.Address1	GM.Contact1.Address2
GM.Contact1.Address3	GM.Contact1.City
GM.Contact1.Company	GM.Contact1.Contact
GM.Contact1.Country	GM.Contact1.DEPARTMENT
GM.Contact1.Dear	GM.Contact1.Ext1
GM.Contact1.Ext2	GM.Contact1.Ext3
GM.Contact1.Ext4	GM.Contact1.FAX
GM.Contact1.Key1	GM.Contact1.Key2
GM.Contact1.Key3	GM.Contact1.Key4
GM.Contact1.Key5	GM.Contact1.Lastname
GM.Contact1.MERGECODES	GM.Contact1.Phone1
GM.Contact1.Phone2	GM.Contact1.Phone3
GM.Contact1.Secr	GM.Contact1.Source
GM.Contact1.State	GM.Contact1.Title
GM.Contact1.Zip	GM.Contact2.Actionon
GM.Contact2.Callbackat	GM.Contact2.Callbackon
GM.Contact2.Callbkfreq	GM.Contact2.Closedate
GM.Contact2.Comments	GM.Contact2.Lastatmpat
GM.Contact2.Lastatmpon	GM.Contact2.Lastcontat
GM.Contact2.Lastconton	GM.Contact2.Meetdateon
GM.Contact2.Meetimeat	GM.Contact2.Nextaction
GM.Contact2.Prevresult	

You may also add fields of your own definition, using the same format as shown above. You may add, for example, GM.Contact2.UTEST, and so on.

## **Adding GoldMine Macros to Adobe Forms**

The following Macros can be added into Adobe Forms in Adobe Designer. You can then view and incorporate them in Goldmine.

GM.Address1	GM.Address2
GM.Address3	GM.Address
GM.CityStateZip	GM.City
GM.CommonDir	GM.Company
GM.Contact	GM.Country
GM.Dear	GM.EmailAddress
GM.Fax	GM.FirstName
GM.FullAddress	GM.GoldDir
GM.LastName	GM.LicUsers
GM.NameAddress	GM.NameTitleAddress
GM.Phone	GM.SerialNo
GM.State	GM.SysDir
GM.Title	GM.UserFullName
GM.Username	GM.WebSite
GM.Zip	

## To Add GoldMine Fields or Macros to Adobe Forms

To add fields to an Adobe form, you must create the form in Adobe Designer (either a new form or copy an existing one), save the document, then pull it into your GoldMine library as described in "Designing a Sample Template in Adobe Designer" on page 1-6.

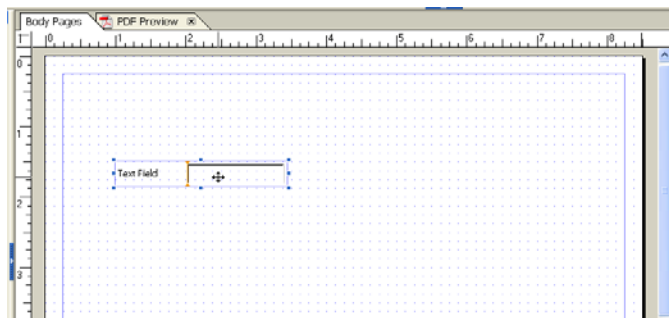
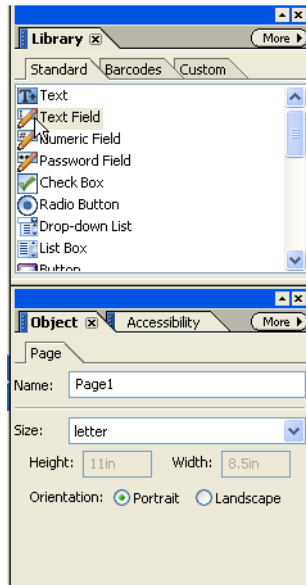
In the following example, you will add the GM.NameTitleAddress macro to an Adobe form. The procedure is the same for adding a field to a new form.

1. In Adobe Designer open a new form by clicking the New Form icon.



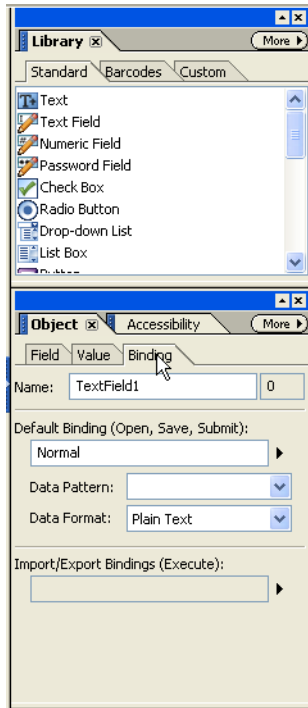
You may also open an existing form.

2. In the Library palette, click the Standard tab, then click on the Text Field and drag it into the workspace.



3. Single click in the Text Field object to select it.

4. In the Object Palette, as shown below, click the **Binding** tab.



5. In the Name field, enter the GoldMine field name. In this case: GM.NameTitleAddress.
6. Save the form in Adobe Designer, then attach and view the form in Goldmine as detailed in the preceding procedures.





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