AFTER **ZERO PLAN**® INSTALLATION: USING THE FORMS BUILDER

After the Zero Plan® Dealer Sales Tools has been installed on your workstation, the Forms Builder is available for you to generate and print Zero Plan® documents for submission to Universal Lenders. Before using the Forms Builder for the first time, there are some important conventions to use and keep in mind to avoid problems.

1. Installing Adobe® Reader on your system
2. Using Adobe® Reader to open the Forms Builder
3. Storing your dealer information for program use
4. Handling Printing Issues when blank forms print

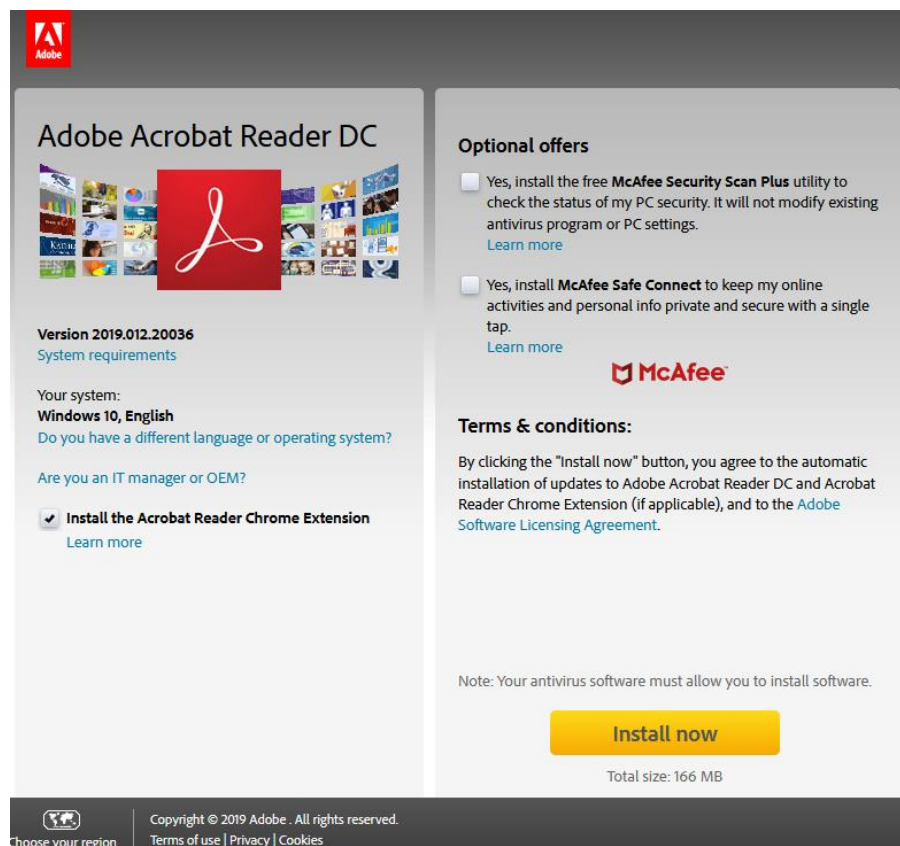## ► Installing Adobe® Reader on your system

SYSTEM REQUIREMENTS: Adobe® Reader or Acrobat : Version 9.0 or Higher

The Forms Builder PDF utilizes a Javascript engine to perform calculation and perform error-checking on your entries. **Adobe® Reader MUST BE USED to open the Forms Builder PDF file on your computer.** Other generic PDF readers/software that are not developed by Adobe® will not read the PDF file properly and will cause errors. You cannot use a web browser (such as Chrome, Edge, Firefox, Opera) to open the PDF file.

To download and install the most recent version of Adobe® Reader on your computer, please visit:
https://get.adobe.com/reader/ (and follow the installation instructions on their website).

- *Uncheck the optional offers to install McAfee if your PC or network already has an antivirus program*

* Depending on your computer/network security settings, you may need to have Administrator access to your PC in order to install new programs. If you do not have Administrator rights, please contact your IT Help Desk or systems administrator.

► Using Adobe® Reader to open the Forms Builder

PROBLEM: **PDF Files open in a web browser or a program other than Adobe®**

Even though Adobe® Reader is installed on your computer, your default system settings may be using a different program to open PDF files. If that is the case, the Forms Builder PDF will not work properly when opened with a different program.

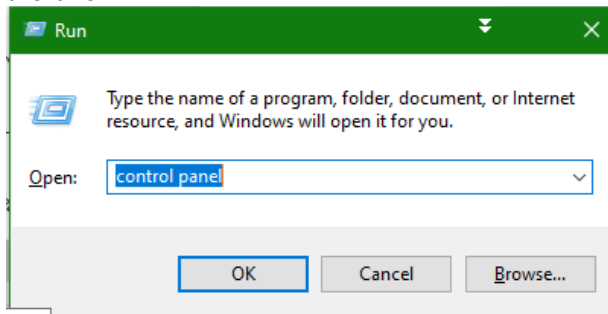**SOLUTION 1:** **Make Adobe® Reader your default PDF application**

SOLUTION 2: **Manually open the Forms Builder PDF with Adobe® Reader**

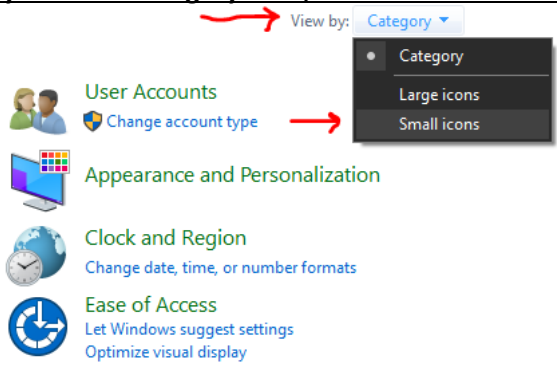### SOLUTION 1 : Make Adobe® Reader your default PDF application

This is the preferred solution to open PDF files, however it requires changing your computer settings. By making Adobe® Reader your default application, all PDF files will open through Adobe®. If you prefer to keep your existing PDF viewer as default, please see Solution 2 to manually open the Forms Builder with Adobe®.
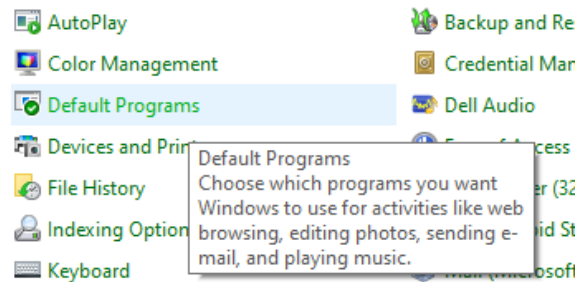
1. Open your Windows Control Panel

a. Press Windows+R on your keyboard to open the Run dialog
b. Type `control panel` in the empty box
c. Click OK

2. If you are in Category view, switch to Small Icons

3.   Choose Default Programs

Default Programs
Choose which programs you want Windows to use for activities like web browsing, editing photos, sending e-mail, and playing music.

4.   Set your default programs

Choose the programs that Windows uses by default

Set your default programs
Make a program the default for all file types and protocols it can open.

Associate a file type or protocol with a program
Make a file type or protocol always open in a specific program.

Change AutoPlay settings
Play CDs or other media automatically

Set program access and computer defaults
Control access to certain programs and set defaults for this computer.

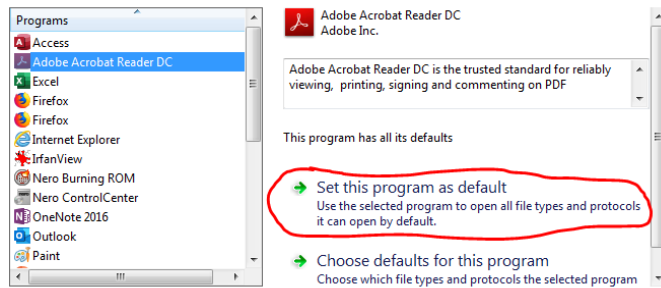*Instructions continued on next page >>*

… Setting Program Defaults (continued)

If you are using WINDOWS 7

A. After the list of programs loads, scroll down to select Adobe Acrobat Reader or Acrobat.

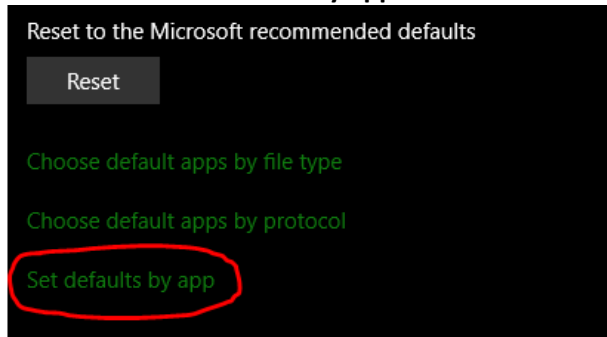B. Click **Set this program as default**, then press OK

Set your default programs

To set a program as the default for all file types and protocols it can open, click the program and then click Set as default.
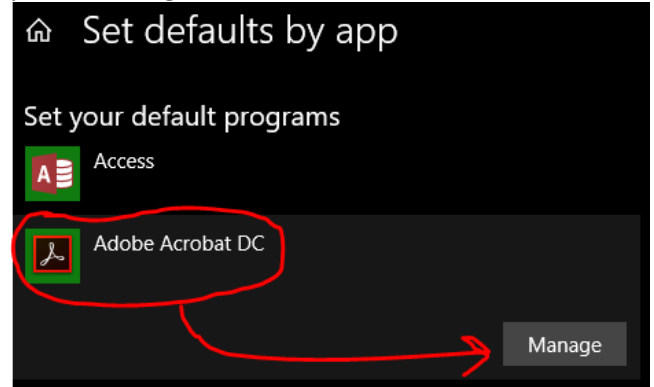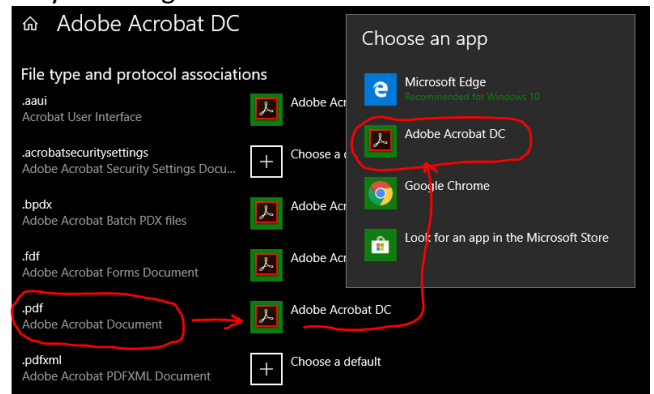

If you are using WINDOWS 10

A. Scroll to the bottom of the Default Apps window and choose "**Set defaults by app**"

B. Find and click on <u>Adobe Reader</u> or <u>Acrobat</u>, then press "**Manage**"

C. Find the .pdf extension and make sure that it is associated with **Adobe Reader** or **Acrobat**. If not, click the program that is already there and change it by choosing Adobe Reader or Acrobat

---

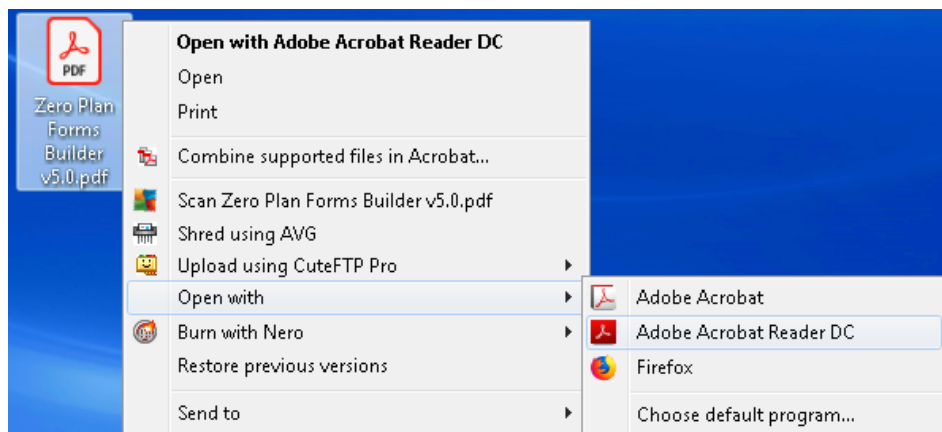## Solution 2 : Manually open the Forms Builder PDF with Adobe® Reader

If you prefer to keep your existing PDF viewer as default, you do not need to make Adobe® Reader default. *However, you will need to follow this instruction every time you want to open the Forms Builder*

- Find the Zero Plan Forms Builder icon on your desktop, and **right click with your mouse**
- Then **Open with ► Adobe Reader or Acrobat**

► Storing your dealer information for program use

1. When you open the Forms Builder for the first time, the dealer information is blank. To store your information for future use (or to update the information at a later time), enter your information into the highlighted fields.

UL.FormsBuilder v5.0

FORMS BUILDER : Generate & Print ZERO PLAN® Forms
The interactive features of this program require Adobe Reader v 9 or higher.
For technical support and trouble-shooting problems, click here.

To set up automatic payments after-the-sale, *don't use this forms builder*.
Please use our automatic payment form by clicking here.

► **DEALER/RETAILER INFORMATION:**
Enter your name and store information below. This information will be displayed on the buyer's contract.

Dealer Name: -YOUR DEALER NAME------------.

Address: -1234 THAT STREET------------.

City, St, Zip: -ANYTOWN, USA 12345----------.

Name of Sales/F&I person submitting this contract (your name). *We will contact you if there are any problems funding the deal.*
- Your Name Goes Here --------

Clear Page   NEXT ►
Continue WITHOUT Saving

SAVE the form (Ctrl+S) in order to store your dealer info for next time. To continue without saving, please confirm by pressing "Continue Without Saving"

2. Press **Ctrl+S** or 🖫 to save the form. You will get a Save As PDF dialogue.

3. Choose/click the **Desktop** from the **Recent Folder** list

Save As PDF

FILES	File Options
My Computer	☐ Reduce File Size ☐ Restrict Editing
Document Cloud	
Add Account	Save in Recent Folder...

📁 Desktop
C:\Users\mike.edwards\Desktop\

4. **DO NOT TYPE OVER** the filename that defaults (*if you do, click cancel*). Simply **press Save to continue**.

File name: Zero Plan Forms Builder v5.0.pdf
Save as type: Adobe PDF Files (*.pdf)
Settings...
Hide Folders   Save   Cancel

5. When it prompts **Replace existing file?**, **Click "Yes"**

Save As

? C:\Users\mike.edwards\Desktop\Zero Plan Forms Builder v5.0.pdf
The file already exists.
Replace existing file?

Yes   No

► Handling Printing Issues when blank forms print

PROBLEM: **When printing documents through the Forms Builder, the forms are blank.**

Newer versions of Adobe® Reader and Acrobat have implemented a Toner Saver feature that causes the forms to print blank. The Toner Saver is enabled by default.

SOLUTION 1: Uncheck the Toner Saver option in the print dialogue box when printing