

# User's Guide: Quickfinder Interactive Electronic Tax Organizer

Please read all instructions before accessing the organizer. Instructions are written for Adobe Reader DC.

## Table of Contents

User's Guide: Quickfinder Interactive Electronic Tax Organizer .....	Page 1
Need Adobe Reader?.....	Page 1
Using Adobe Reader to Complete the Forms .....	Page 1
Quick Tips for Using Adobe Reader DC.....	Page 2
Menus and Toolbars.....	Page 2
About Menus .....	Page 2
About Tools and the Toolbar.....	Page 2
Search the PDF.....	Page 2
Use the Find Tool (Edit→Find) .....	Page 2
Use the Search Window (Edit→Advanced Search).....	Page 3

## NEED ADOBE READER?

- 1) Using the electronic organizer requires Adobe Reader. To check your system for Reader and verify the version, go to your system's *Control Panel*→*Add or Remove Programs*→*Adobe Reader*. Select "Click here for support information." The version shown there should be DC or higher.
- 2) To download Reader or update to a higher version, go to <http://get.adobe.com/reader/>. The prompts will take you through the steps to complete the download.

## USING ADOBE READER TO COMPLETE THE FORMS

- 1) When the file opens, you will see gray boxes where you need to enter information. Click in the first gray box on the page and type in the information requested. Use the tab key to advance to the next cell. You may also use your mouse to click in the next field you wish to fill out.
- 2) When entering a date, use the following format: mm/dd/yyyy (for example, 10/31/1998).
- 3) To select or deselect a checkbox, use your mouse to click the box.
- 4) For radio buttons (such as the Yes/No buttons), you can only select one of the options available. If you select one and then change your mind and select another option, the first option will automatically get deselected.
- 5) If a column has a total field, the total will automatically update after you enter information into the table. When you finish entering an amount in a cell and click in a new cell (or click on a blank area of the PDF in order to deselect the current table cell), then the total field will automatically update to include the new information.
- 6) Save the entire organizer to your hard drive: Choose *File*→*Save As*→*PDF*. Select the location where you want to save the file and click *Save*.
- 7) If you wish to print your completed documents, choose *File*→*Print*.
  - a) *To print the entire organizer*. In the pop-up box, under *Pages to Print*, select *All* and click *Print*.
  - b) *To print a single page (or a range of pages)*. In the pop-up box, under *Pages to Print*, select *Pages* and type in the page(s) you wish to print.

# Quick Tips for Using Adobe Reader DC

Before you start, view these quick tips for the best results using Adobe Reader DC.

## MENUS AND TOOLBARS

### About Menus

Ordinarily, it's a good idea to keep the Menu bar visible so that those items are available as you work. The Menu Bar holds the File, Edit, View, Window, and Help drop-down menus. It is possible to hide them using *View→Show/Hide→Menu Bar*. However, the only way to display it again is by pressing *F9*.

Reader also has numerous context-sensitive tools. These tools appear when you right-click an element in the work area or PDF that has such a menu associated with it. A context menu displays commands that relate to the item or area that you clicked. For example, when you right-click the toolbar area, that context menu displays the same commands as *View→Show/Hide→Toolbar items*.

⚠ **Caution:** The menu bar appears only if Reader is open as a stand-alone application. If Reader is open within the browser, only the browser application menu appears at the top of the window. However, context menus are available in both cases.

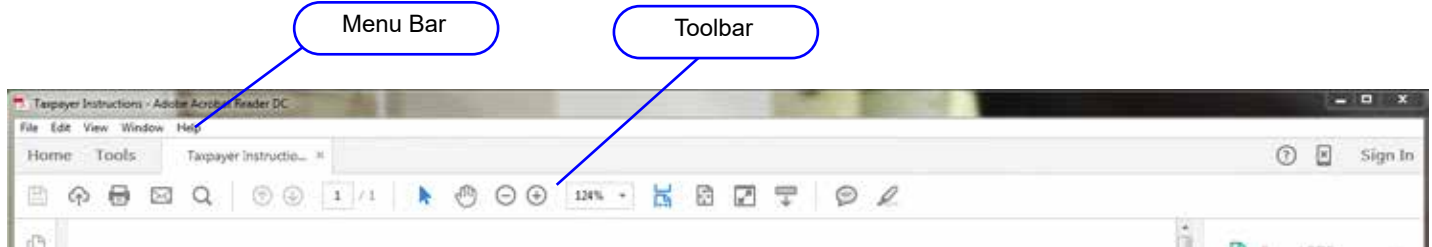
### About Tools and the Toolbar

The toolbar arranges the available tools into task-related groups so it's easier to find what you are looking for. Some tools appear by default and some are hidden. All available toolbars can be found under *View→Show/Hide→Toolbar Items*. The tool categories are:

- **File Tools.** Includes Save, Save file to Adobe Cloud, Print, and Send File.
- **Edit Tools.** Includes Check Spelling, Undo, Redo, Cut, Copy, Paste, Take Snapshot, Find, and Advanced Search.
- **Page Navigation Tools.** Includes First Page, Previous Page, Next Page, Last Page, Page Number, Previous View (which will take you to the last viewed page in the document), and Next View.
- **Page Display Tools.** Includes Enable Scrolling, Single Page View, Two Page Scrolling, Two Page View, Full Screen Mode, Line Weights, rotate view Clockwise, rotate view Counterclockwise.
- **Select & Zoom Tools.** Marque Zoom, Dynamic Zoom, Pan & Zoom, Loupe Tool, Actual Size, Zoom to Page Level, and Fit Width.

You can add any of the tools from these categories to the toolbar that appears at the top of the viewing window, but, when that toolbar is full, any new tools you add will appear in a drop-down list that can be accessed by clicking on the down-arrow button at the end of the toolbar.

The *Page Navigation* and *Page Display* tools are the two tool categories you will be using most.



## SEARCH THE PDF

You can run a search using either the Search window or the Find tool. In either case, Reader searches the PDF body text, layers, form fields, and digital signatures. You can also include bookmarks and comments in the search.

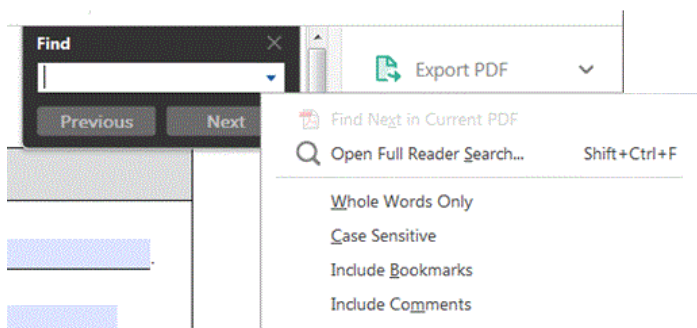
The Search window offers more options and more types of searches than the Find toolbar.

### Use the Find Tool (Edit→Find)

The Find tool (Edit→Find or Ctrl + F) searches the PDF that is currently open.

- 1) Type the text you want to search for in the text box.
- 2) (Optional) Click the arrow next to the text box and choose one or more of the following:
  - a) **Whole Words Only.** Finds only occurrences of the complete word you type in the text box. For example, if you search for the word "tax," the words "taxable" or "taxation" aren't found.
  - b) **Case-Sensitive.** Finds only occurrences of the words that match the capitalization you type. For example, if you search for the word Web, the words web and WEB aren't found.
  - c) **Include Bookmarks.** Also searches the text in the Bookmarks panel.
  - d) **Include Comments.** Also searches the text of any comments.
- 3) To start the search, press Enter. Reader jumps to the first instance of the search term and highlights it on the page so it's easier to see.

- 4) Press Enter repeatedly to go to the next instances of the search term. You can also click on the Previous and Next buttons in the Find menu to navigate through the search results.



## Use the Search Window (Edit→Advanced Search)


Use the Search window (Edit→Advanced Search or Shift + Ctrl + F) to look for words or document properties across multiple PDFs or to use the advanced search options. You can also open the Search window by choosing *Open Full Reader Search* from the Find tool drop-down menu. The Search window appears as a separate window that you can move, resize, minimize, or arrange partially or completely behind the PDF window. When you first open the window, Reader will automatically resize the main PDF window so that the search window will fit beside it on your computer screen.


**Arrange the PDF document window and Search window.** If Reader doesn't automatically resize the windows, you can do so manually by clicking *Arrange Windows* (found at the top of the Search window). Reader resizes and arranges the two windows side-by-side so that together they almost fill the entire computer screen.


**Note:** Clicking the Arrange Windows button a second time resizes the PDF document window but leaves the Search window unchanged.

**To jump to a specific item in the search results.** If necessary, click the + beside the search results to expand them. Then select an item in the results to view it in the PDF. Reader will go to the correct page and highlight the item on that page. To view a different item, click a new item from the results list.

**Icons shown with search results.** The icon next to each item in the Search results window indicates the search area in which that item appears. The most common types of icons and their meanings are listed below:

 *(General) Search Result icon.* In PDFs, jumps to that instance of the search term, usually in the body text of the PDF. The instance of the search term is highlighted in the document.

 *Non-PDF Search Result icon.* In non-PDF files, opens the file; or if opening of that file type is restricted, opens a message dialog box. This icon is also used for search results found in the document metadata, which cannot be opened.

 *Bookmark icon.* Opens the Bookmarks panel and highlights the instances of the search terms.

**Advanced search options.** By default, the Search window displays basic search options. Click *Show More Options* near the bottom of the window to display additional options. To restore the basic options, click *Show Less Options* near the bottom of the window.

**Note:** You can set a preference so that advanced search options always appear in the Search window. In the Preferences dialog box (Edit→Preferences) under *Categories*, select *Search*, then check "Always show more options in advanced search."

- *Return results containing.* Restricts your search results according to the option you choose:
  - *Match Exact word or phrase.* Searches for the entire string of characters, including spaces, in the same order in which they appear in the text box.
  - *Match Any of the words.* Searches for any instances of at least one of the words typed. For example, if you search for "each of," the results include any instances in which one or both of the two words appear: "each," "of," "each of" or "of each."
- **Note:** You cannot run wildcard searches using asterisks (\*) or question marks (?).
- *Use These Additional Criteria.* Includes the basic search options plus four additional options:
  - *Whole Words Only.* Finds only occurrences of the complete word you type in the text box. For example, if you search for the word "tax," the words "taxable" or "taxation" aren't found.
  - *Case-Sensitive.* Finds only occurrences of the words that match the capitalization you type. For example, if you search for the word Web, the words web and WEB aren't found.
  - *Proximity.* Searches for two or more words that are separated by no more than a specified number of words, as set in the Search preferences. Available only for a search of multiple documents and when *Match All Of The Words* is selected.
  - *Stemming.* Finds words that contain part (the stem) of the specified search word. For example, a search for "opening" finds instances of "open," "opened," "opens," and "openly." This option applies to single words and phrases searches. Stemming isn't available if either *Whole Words Only* or *Case-Sensitive* is selected.
  - *Include Bookmarks.* Searches the text of any bookmarks, as viewed in the Bookmarks panel.
  - *Include Comments.* Searches the text of any comments added to the PDF, as viewed in the Comments panel.
  - *Include Attachments.* Searches files that are attached to the current PDF or other attached PDFs (up to two levels deep).