



QUICK & EASY FORMS THAT THINK

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If you need additional information about *Quick & Easy*, look in the Read Me file, Help System (F1) or *Technical Reference*. For additional help, please check this manual's *Table of Contents* and *Index* for topics related to the problem you are experiencing. If you still have unanswered questions, our technical support staff is here to help you.

When you call, you should be at your computer and have the software and documentation at hand. Be prepared to provide the following information:

- Version number of Quick & Easy (select About on the Help Menu).
- Operating system.
- Type of hardware (including network information).
- Other software running concurrently (virus scanner, compression program, etc.).
- The exact wording of any error message.
- What you were doing when the problem occurred.
- A description of how you tried to solve the problem.

Hours of Operation

Technical support is available from 8:30 a.m. - 5:00 p.m. EST, Monday - Friday.

Ways to Contact Us

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4800 Linglestown Rd., Ste. 201
Harrisburg, PA 17112
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Phone: **(717) 652-4344**

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Installing

NETWORK ADMINISTRATOR OR IT MANAGER:

Notes:

If you are installing *Quick & Easy* on a standalone computer, follow the instructions in Steps 1, 6 and 7.

Network Administrator or IT Manager: If you have more than one person who will be using *Quick & Easy*, you can install *Quick & Easy* in one place and let all users share it over your office network.

- Step 1** Install *Quick & Easy* on the server.
- Step 2** Copy files from the Workstation folder on the CD to a temporary folder on the server.
- Step 3** Share the two folders, giving (full) read/write sharing rights to the folder where you copied the files and the folder where *Quick & Easy* is installed.
- Step 4** On each workstation, map the folder where *Quick & Easy* is installed and the folder where the *Quick & Easy* CD was copied. Use the same letter to map each folder on each workstation.
- Step 5** On each workstation run Setup from the mapped temporary *Quick & Easy* folder on the server to install support files needed to run *Quick & Easy* on workstations.
- Step 6** Enter the License ID, password and serial number of each form package purchased.
- Step 7** Unlock *Quick & Easy* so that it will run on the server and workstations using the website or by telephone.

Step 1: Install *Quick & Easy* on the server.

1. Choose the type of installation that you want to perform:

Full – If this is a stand-alone computer that will run *Quick & Easy* or if this is a server that needs to be able to run *Quick & Easy*.

Server – If this is a server that does not need to run *Quick & Easy*. Choosing this option puts program files, not support files on the system, therefore not requiring you to reboot after installation is finished.

Workstation – If this is a computer on a network and you have

already run a Full or Server install on another computer on the same network. (Follow the instructions in Step 5 later in this section to perform a workstation install.)

2. Wait while InstallShield wizard prepares setup for use.
3. Click Next when you see the Welcome screen.
4. You must agree to the terms of the license agreement in order to continue installing. If you agree, click "I accept the terms of the license agreement." Click Next.
5. Choose the destination folder for installation. Click Change to select a folder other than the default. Click Next to proceed.
6. Click Install to start copying files. You can click Back if there are any settings that you'd like to change before installing. Click Cancel to quit without installing.
7. Setup will copy all files. Click Finish. You may be asked to restart your computer after setup is finished.

Step 2: Copy files to a temporary folder on the server.

1. Start Windows Explorer.
2. Create a temporary folder on the server. (Click on the Drive letter in Explorer. Choose File/New/Folder. Type the name "Temp Quick & Easy" and press Enter.)
3. Place the *Quick & Easy* CD in your CD-ROM drive.
4. Double-click the drive letter of your CD-ROM drive.
5. Double-click on the Workstation folder.
6. Click on any file in the right pane of Explorer.
7. Choose Edit/Select All.
8. Choose Edit/Copy.
9. Double-click on the Temp *Quick & Easy* folder. (The folder you created in step 2 above.)
10. Choose Edit/Paste. All selected files will be copied to the temporary folder.

Step 3: Share the folder where *Quick & Easy* is installed and share the folder where you copied the *Quick & Easy* files.

1. In Windows Explorer, navigate to the folder where *Quick & Easy* is installed.
2. Right click on the installation path and choose Sharing from the pop-up menu.

3. In the Sharing dialog, select the option Shared As...

4. Then select Full under Access Type.

Now do the same steps with the "Temp Quick & Easy" folder (the folder where you copied the *Quick & Easy* files).

Step 4: Map both the Temp *Quick & Easy* folder and the folder where *Quick & Easy* is installed on each workstation.

You should use the same drive letters to represent these two folders on each workstation. Let's pick Q for the folder where *Quick & Easy* is installed on the server and Y for the "Temp Quick & Easy" folder where you copied the files.

To map the drives:

1. On the workstation, start Explorer.

2. Navigate to the folder on the server where *Quick & Easy* is installed.

3. Right click on the folder and select Map Network Drive.

4. Choose Q as the Drive.

5. Click OK.

6. Navigate to the "Temp Quick & Easy" folder on the server.

7. Right click on the folder and select Map Network Drive.

8. Choose Y as the Drive.

9. Click OK.

If Q and Y are already mapped, choose different letters. It is important however to choose the same letter to represent each folder on every workstation. This will make setup automation easier and give less chance for errors.

Step 5: Install *Quick & Easy* on workstations.

On each workstation:

1. Navigate to the "Temp Quick & Easy" folder in Explorer (Drive Y or whatever letter you selected when you mapped it).

2. Double-click the folder to display its files.

3. Double-click the file setup.exe to run it.

4. Wait while InstallShield wizard prepares setup for use.

5. Click Next when you see the Welcome screen.

6. You must agree to the terms of the license agreement in order to continue installing. If you agree, click "I accept the terms of the

license agreement." Click Next.

7. Choose the folder on the server where *Quick & Easy* has been installed. Click Browse to select a folder other than the default. Click Next to proceed.
8. Click Install to start copying files. You can click Back if there are any settings that you'd like to change before installing. Click Cancel to quit without installing.
9. Setup will copy all files. Click Finish. You may be asked to restart your computer after setup is finished.

All support files necessary to run *Quick & Easy* will be copied to the workstation and registered. Please be patient as setup finishes and Windows reboots. It may take a few minutes to finish updating your computer.

Step 6: Enter License ID, Password and Serial Number of each form package.

Each form package you purchased must be registered before using or unlocking *Quick & Easy*. You will find the necessary information on a sticker on the back of your CD envelope. The *Quick & Easy* Administrator stores all the necessary registration information.

To register the form packages:

1. Locate the envelope that held the CD.
2. Find the sticker that has the License ID, Serial Number and Password on the back of the envelope.
3. Select Start/Programs/DataTech Software/Quick and Easy Administrator.
4. The Form Manager will appear the first time you run the Quick and Easy Administrator. If this is not the first time, select the Form Manager button.
5. Type the License ID, Password and Serial Number on the sticker.
6. Click OK. Repeat 4-6 in this list if you have another form package to register.

Step 7: Unlock *Quick & Easy* using the website or telephone.

Before you can run *Quick & Easy* on the server or workstations you must unlock *Quick & Easy*. You do this using a code that is generated by DataTech. You can call us between the hours of 8:30 AM and 5:00 PM EST M-F at 1-717-652-4344 or you can log on to the website at www.softwarekey.com/unlock and generate an unlock code 24 hours a day, seven days a week.

If you plan to run *Quick & Easy* on the server, you will need to generate two separate codes – one to unlock *Quick & Easy* on the server and one to unlock *Quick & Easy* on the workstations. The workstations will all use the same unlock code, but you need a second code to run *Quick and Easy* on the server. Note that if you do not plan to run *Quick & Easy* on the server, you do not need to generate a second code.

To generate an unlock code for your workstations:

1. Go to a workstation computer.
2. Log on to the web using your internet connection program.
3. Start the Administrator by selecting Start/Programs/DataTech Software/Quick and Easy Administrator.
4. Click the Registration Manager button.
5. Click the Automatic Unlock button.
6. An unlock code will be generated and entered into *Quick & Easy* for you.
7. You will see a message telling you that *Quick & Easy* is unlocked. Click OK.

If you want to run *Quick & Easy* on the server, generate another unlock code by following the same steps as above while you are at the server.

Reinstalling *Quick & Easy* on a computer:

Quick & Easy setup can remove itself from your computer. Re-run setup to uninstall. You can also re-run setup again at any time to reinstall *Quick & Easy*.

Remember that the unlock code(s) will need to be regenerated if you reinstall. To do so, follow the directions for unlocking *Quick & Easy* in the previous section.

Purchasing More Forms

You can purchase any of the forms that are currently running in evaluation mode. To do so, call DataTech Software at 1-800-556-7526 between the hours of 8:30 AM and 5:00 PM EST M-F. When you purchase a set of forms, you will receive a serial number that will unlock the forms for you. You enter the serial numbers for purchased form packages in the *Quick & Easy* Administrator. (Select Start/Programs/DataTech Software/Quick and Easy Administrator.) Serial numbers for forms originally purchased are located on a sticker on your *Quick & Easy* CD envelope.

Getting Started

ABOUT THIS MANUAL

This section discusses the manual and screen conventions, use of the keyboard and mouse and the help system. If you are new to using Windows programs, you might want to run the tutorial that ships with Windows for a general review of the Windows interface, special keys, mouse usage or help systems.

We do suggest that you read the entire manual to acquaint yourself with the basic features of *Quick & Easy*. Once you have an understanding of the features, you should re-read sections as needed to guide you through entering and printing the data. If you still have questions, Help is available at all times by pressing F1 or clicking the Help icon on the toolbar.

Manual Conventions and Keyboard Usage

- In this manual, the term arrow keys refers to the actual arrows on your keyboard (the left, right, up and down arrow keys).
- Keyboard directions are shown using all capital letters. For example, the Alternate key is labeled ALT and the Enter key is labeled ENTER.
- Often a sequence or series of keystrokes is required. To represent this we use '+' and ','. If you see ALT+F4, this means to press and hold the ALT key while pressing the F4 key. ALT,F,S means press ALT, then F, then S in sequence.
- Access keys can be used to quickly execute a certain item. In the manual, access keys usually follow the name of the field, menu command or command button to which they refer. For example:

Choose the Replace All button (ALT+R).

-OR-

Choose Exit (ALT,F,X) from the File Menu.

In these examples, pressing the keys in parentheses executes the button or menu command.

Mouse Usage

- **Pointing:** To point to an item, place the mouse pointer on top of it.
- **Clicking:** To click on something, place your mouse pointer on the item, then quickly press and release the left mouse button. This is usually used to move to a field or select a button or an item from a list.
- **Double-clicking:** To double-click on something means to place the mouse pointer on the item then quickly press and release the left mouse button twice. This is a shortcut used to access certain tasks.
- **Dragging:** To drag the mouse means to point at an item, then press and hold the left mouse button while moving the mouse to another area of the screen.
- **Highlighting Text:** To highlight text with your mouse, place your mouse cursor at the beginning of the text you want to change. Click and drag your mouse; (i.e., click and hold down the left mouse button while moving the mouse) to the end of the text you want to change. Release the mouse button. All highlighted text will be changed whenever you select a formatting option; (e.g., font, font size, bold, line spacing, alignment, etc.). If you select a paragraph formatting option such as line spacing or alignment, the formatting change will affect the entire paragraph, even if not all of it is highlighted.

Typing in Text

If you are required to type in text (as when installing *Quick & Easy*), the text you need to type is shown in bold lowercase letters. If you are asked to type in **b:\setup** you would type the characters "b:\setup" with no spaces.

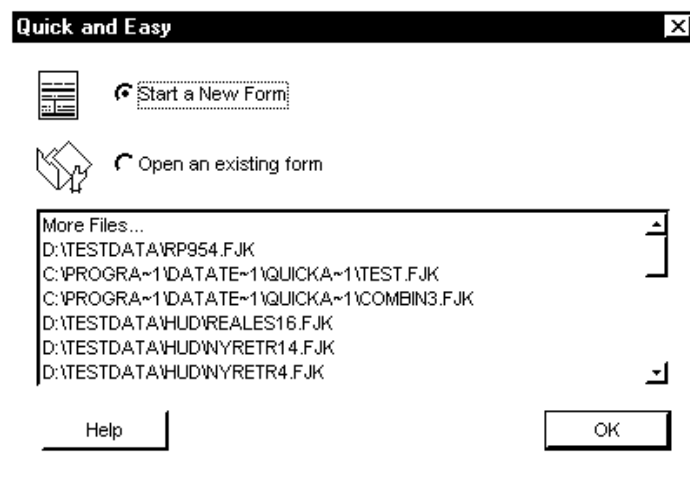
STARTING *QUICK & EASY*

When you run Setup, icons are automatically created on the Start Menu under Programs / DataTech Software / Quick and Easy to start *Quick & Easy*. There are also icons for Help and Read Me files.

⇒ To start *Quick & Easy*:

1. Select Start/Programs/DataTech Software/Quick and Easy.

2. In the Startup dialog, select to start a new form or open an existing one.



Select to start a new form or open an existing one.

EXITING

ALT,F,X

When you are finished using *Quick & Easy*, select Exit (ALT,F,X) from the File Menu. If your data has changed, you will be prompted to save. If you answer "No", the changes will not be saved.

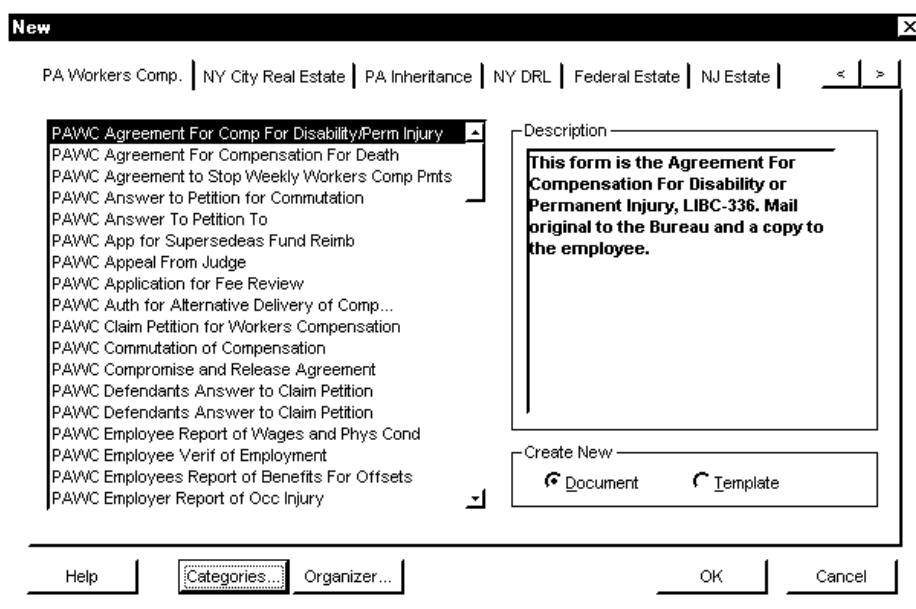
Using the Forms

Quick & Easy allows you to create a form or open a form you previously created. If you need to fill out more than one form, you can type data into one form, save it, then open the file as another type of form. All data that is the same on the second form will be filled in using what you typed into the first form.

All forms available to Quick & Easy are listed. Forms not purchased cannot be saved and will print with "EVALUATION COPY" over the top of the form. To purchase additional forms, call DataTech Software Sales Department at 1-800-556-7526.

CREATING A NEW FORM

CTRL+N



Click on a form name to create a new one.

When you want to create a new, blank form, choose New (CTRL+N) from the File menu or click on the New icon. You will see a dialog box with tabs, each holding a group of forms. Select the tab holding the group of forms you want to use, then click the name of the form you want to create from the list and click OK.

Remember that after you create a new file you must save it by choosing Save As (ALT,F,A) from the File Menu. Save the file using a

name different from that of any other forms you have created.

If you want to use data in an existing form see the instructions later in this section.

Note: After converting a form, please check all information before submitting it in order to ensure that all data transferred properly from one type of form to the other.

OPENING A FORM

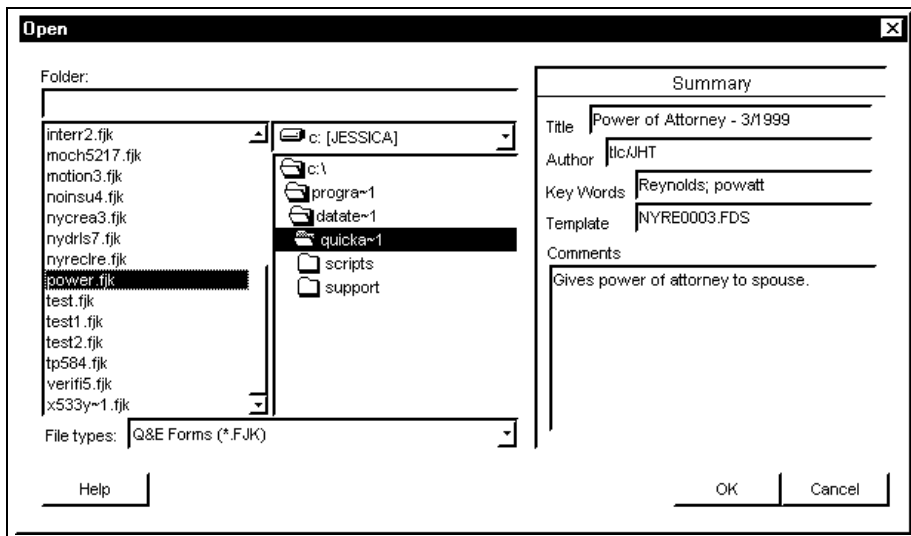
CTRL+O

The Open menu command lets you edit an existing form. You would also select Open to use a form created in an earlier version of *Quick & Easy*.

After you select Open from the File menu or toolbar, you will see a dialog box allowing you to select a drive, folder and file name.

⇒ **To open a form:**

1. Click the file you want to open from the list.
2. You will see information about the file. Click OK to open the file.



Select the name of the file you want to open.

Beside File types at the bottom of the dialog box, you see Q&E Forms *.fjk. This means that all files with the extension ".fjk" are displayed in the list. Above the list you see the current path selected. The drive C:\ is selected and the folder holding *Quick &*

Easy is selected. Double-click on another folder to see if it contains any files with the “.fjk” extension.

You will also see basic information about each file you click on to the right of the drive and folder lists. This information is filled in if you added Summary Information when you created the file.

⇒ **To change the disk drive you are using:**

1. Click on the arrow to the right of the drop-down list to display all drives available.
2. Use your arrow keys or mouse to select a drive to use.

⇒ **To change the folder you are using:**

1. Select (press ENTER or double-click) the drive name at the top of the list of folders to see all folders in the root folder.
2. Press the up or down arrow to highlight the folder you want and press ENTER.

NOTES:

For help retrieving a file automatically saved by *Quick & Easy*, see the *Technical Reference* section of this manual. You can transfer data from one form to another form by selecting Import Files from the File Menu. For help using data already typed into a form, see the instructions later in this section.

USING INFORMATION TYPED IN ANOTHER FORM

There are several ways to reuse information already typed into a form.

⇒ **To fill a form with information you want to be there every time that form is created (for every case):**

1. Create a new form.
2. Fill it with the information you always want to be there; (e.g., your firm’s name and address).
3. Save the form as a template.
4. Give the template a title that includes the form’s name so you can recognize it readily.
5. When you need another form of that type, select the template from the list of forms in the New dialog box. The template you saved will probably be on the tab called “User Defined.”



Choose Template (*.TPL) in Save file as type list.

Notes:

You can create as many new forms as you wish from a template.

Forms created this way will be filled with the information saved in the template.

You can organize and categorize your templates using the Organizer and Categories buttons in the New dialog box.

You can make a template for each form or more than one for each if necessary.

⇒ To fill a form with information entered into a form of the same type:

1. Open the file containing the information you want to use.
2. Select Save As from the File Menu.
3. Type a different file name and save the file.
4. Make any changes you want in the fields of the form.
5. Choose Save from the File menu or toolbar to save the final copy of the file.

Note: This saves two copies of the same form. There will be slight differences in the data after you edit the second copy.

⇒ To fill a form with information entered into a different type of form:

1. Select Import Files from the File Menu.
2. Select the Browse button in the Wizard.
3. Choose the file that contains the information you want to use to fill the new form. Click OK.
4. Press the Next button.
5. If the form you want to fill is displayed in the background, choose to load the selected form into the current file and skip the next step. Otherwise choose the option to select a template. Press Next.
6. If you chose to select a template, click the Select Template button to choose the form you want to fill with the information. Press OK, then press Next.
7. Click Next to import all related information. You can turn off certain types of information if you want to limit what is imported.

8. Click Next. Click Finish to begin importing.

Notes:

Only information that is the same on both forms will be imported. This is the best way to transfer information about a case from one type of form to another.

MANAGING YOUR FORMS AND TEMPLATES

Forms and templates are organized on tabs in the New dialog box. Each tab represents a "Category." You can place a form or template in any category you wish. You can even have numerous copies of the same form listed in different categories. You can also reorder the categories to bring one tab to the front for easier access.

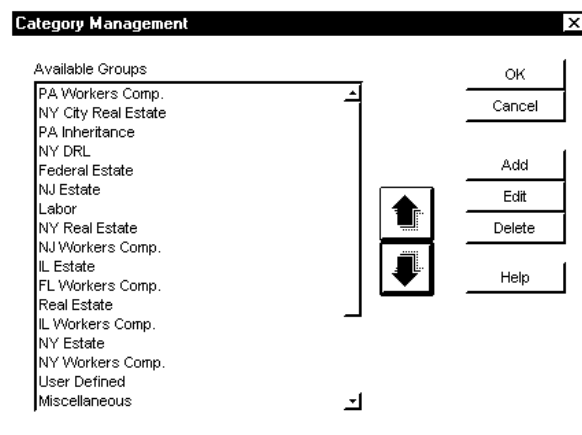
Notes: If you are running Quick and Easy over a network, changes made to the way forms, templates and categories are displayed in the New dialog box will be global; i.e., all users will see the New dialog box the same way and any changes made to it will affect all other users.

Avoid having people make changes to the New dialog box simultaneously since only one person's changes can be saved at a time.

Categories

In New, select the Categories button to do any of the following:

- Change the order that the tabs appear in the New dialog box. Click on a Category and click the up or down arrow buttons to change its position in the list. The order of categories in the list is the order in which the tabs will appear in the New dialog box.
- Add a new tab to the New dialog box. Click Add to create a new category.
- Edit a tab's name in the New dialog box. Click the Edit button to change the selected Category's name.
- Delete a tab from the New dialog box. Click Delete to permanently remove the selected Category and all the templates and forms it contains from the new dialog.



Click a button to add, edit, delete or re-order a category.

Organizer

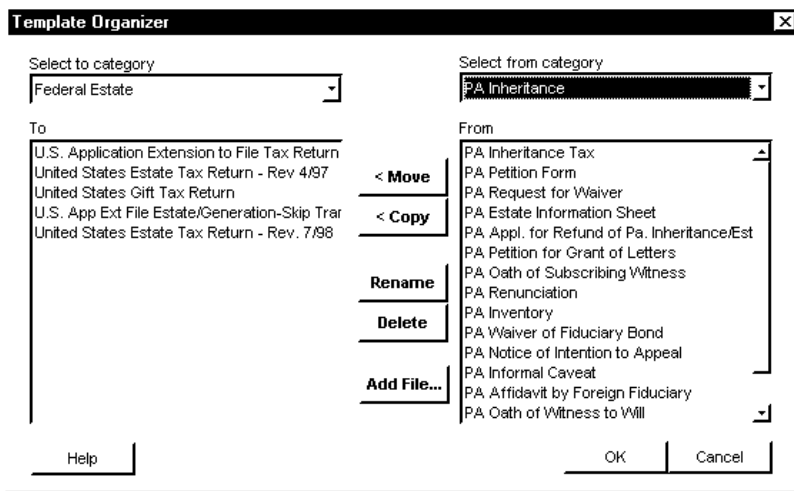
Select the Organizer button in the New dialog box to add templates to a category, edit the name of a template, remove a template, move a template to a different category or make another copy of a template appear on another category. There are two sides to the Template Organizer dialog box. The arrows on the Move and Copy buttons show which direction the templates will be moved or copied.

⇒ **To rename or delete a form or template:**

1. Select the category you want to use on the left.
2. Click on a form or template in the list.
3. Click Rename to change the name of the form or template.
4. Click Delete to remove the form or template from the list of forms.
5. Click OK to save changes.

⇒ **To add a form or template**

1. Select the category you want to use on the left.
2. Click Add File to add a template or form to this category. All forms are stored in the Scripts folder.
3. If you want to add a template you created, select User Defined Template from the List Files of Type list.
4. Click on the template you want to add. You may have to change the folder, however all templates you save should be saved to the Scripts folder.
5. Click OK, then click OK again to save changes.



Click to Move, Copy, Rename, Delete or Add a Template

⇒ To move or copy a form or template:

1. Click the arrow to display the list on the left. Select the Category you want to move or copy FROM.
2. Click the arrow to display the list on the right. Select the Category you want to move or copy TO.
3. Click the form or template you want to move or copy so it is highlighted.
4. Click the **Copy** button to place a second copy of the form or template in the other Category. This form or template will appear on both categories' tabs in the New dialog box.

Click the **Move** button to remove the form or template from the category where it is currently located and place it on the second category. From now on it will be located on a different category's tab of the New dialog box.

5. Click OK to save changes.

SAVING A FORM

CTRL+S

Save on the File Menu lets you store all of the data entered into the form. Save will use the same path and file name as the last time you saved the file. It is important that you save your data periodically while you are using *Quick & Easy* since it is retained in memory only, not the hard drive, until saved. This means that a power failure or other hardware problem could cause the loss of changes or additions since the last save.

⇒ **To save your open form using the same file name:**

Choose Save (CTRL+S) from the File Menu

-OR-

Click the disk icon on the toolbar.

Quick & Easy also has an 'Automatic file save' feature that will save your data to a file named AUTOSAVE.SAV every few minutes. You can turn this feature on and off in the Options dialog (Tools Menu). See the section called Automatic Saving of Data later in this section for more information on this feature.

SAVING A FORM USING A DIFFERENT FILE NAME

ALT,F,A

The first time you save a file, the Save As dialog box will appear and you will be asked to enter a file name for the file you are currently editing. You can also use the Save As menu command to save a form under a different file name. This allows you to edit the document without altering the original. This is especially helpful when you want to have several different versions of the same form current.

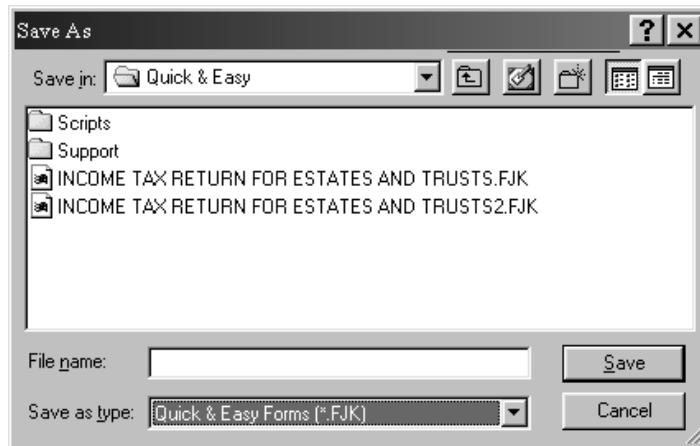
Once you have entered "core" data, you can create new forms quickly using the Save As menu command. You can create as many different versions of a form as you want as long as you save each file using a different file name.

You would choose Save As for all of the following reasons:

- to save a file as a template
- to save the file to a floppy disk
- to change the file name
- to save two or more copies of the same file
- to save a newly created file
- to save the file to a different drive or folder.

As the Save As dialog box opens, the File Name field will be automatically highlighted for you and you will see the default extension in the field. If you want to save the file to the folder and drive shown on the right side of the dialog box, type a name for the file into the File Name field. Press ENTER to save the file using this name. You don't have to type a "." or extension since the default extension will automatically be added to the file name you type. Make sure that you save files using unique names, since you would completely erase your data if you create a second file and save it

using the same name as the first file.



Type in a file name to use.

⇒ **To select or enter a file name to use:**

1. Click on the File name field.
2. Type in a new file name. You don't have to add the default extension since *Quick & Easy* will automatically add this for you (ex. BUDGET; JONES1; SMITH, etc.).
3. Click OK.

-OR-

1. Access the list of files in the selected drive and folder. Use your up and down arrow keys to highlight the file you want to overwrite, then press ENTER. Remember that overwriting a file is permanent and will replace the other file saved using that name.

Note: You can also type the complete path and file name into the File Name field.

AUTOMATIC SAVING OF DATA

ALT,T,O

With *Quick & Easy*, your data is kept in memory at all times, not the hard drive. Therefore, if you exit without saving your data or if there is a power failure, you will lose the changes that you have made to your data since the last time that it was saved.

When Automatic File Save is turned on, your data is periodically saved to a file called AUTOSAVE.SAV. This gives you a backup of your work every few minutes, reducing the risk of losing your data

through power failure or some other accident. Turn this feature on by selecting Automatic File Save in the General tab of the Options dialog box (Tools Menu). See the Technical Reference section later in this manual for information on retrieving an automatically saved file.

Note: Automatic File Save is not intended to take the place of saving your data manually since any open file is always backed up to the same file name, overwriting the entire contents of the file every few minutes. ***Automatic File Save is simply to serve as a backup in case of an accident, not as the permanent way to save your data.***

Entering Data

You will type your information onto screens that look like the form. Each screen is one page of the form. Most users will fill in page 1 first, then page 2 and so on until they are finished.

Because you can convert data from one type of form to another, it doesn't matter which form you fill-out first. Type the data into a form, save it, then use it later to fill out any other form containing related information. This will save you from having to type the same information twice; allowing you to spend more time editing and improving the text of your forms. After the conversion we suggest that you review the answers to each question to make sure that all data has transferred the way you intended and is ready for submission. There are two ways to re-use information typed into a form:

- entering information and saving the file as a template
- importing a file.

Both procedures are discussed later in this section.

MOVING FROM ONE FIELD TO ANOTHER

Answer each question accurately in the space provided. Use TAB to move from one field to the next. Use the scroll bars on the bottom and right of the screen to view different parts of the current page.

If you need to quickly move around on the screen, use the arrow buttons on the side of the horizontal scroll bar or use the scroll bars located on the side (right) and bottom of each screen. You can also click on a field on the side of the screen you want to move to and this will shift the screen in that direction.

Text can be typed into any field of the forms. The size of the fields on the screen corresponds to the space available in the fields on the actual form. Type into the fields and choose formatting to change the text's appearance. Formatting in the field affects the entire field, not just the text you highlight.

The word processing areas have full formatting capabilities such as fonts, bold, italics, underline, alignment and bullets.

Questions that allow more than one answer or item to be entered have their own scroll bar to move from one answer to the next. Four buttons on the toolbar control adding, inserting, deleting and

arranging answers to these questions.

ENTERING TEXT IN WORD PROCESSING AREAS

Word processing areas allow you to type as much text as you need in the format you choose. You can change line spacing, alignment and add bullets in these areas. Text will be placed on the form and then what doesn't fit will be formatted and printed automatically on continuation sheets.

Tabs

Tabs can be controlled using the ruler at the top of each word processing area. To place a tab, click on the ruler. To remove a tab, click and drag the tab off of the ruler. The changes you make to tabs will affect only the highlighted paragraphs, however pressing ENTER at the end of a line carries the tab settings over to the next line.

Hanging Indents

Hanging indents are placed in your text automatically when you select to insert a bullet. You can manually create a hanging indent by highlighting the paragraph you want to indent, then clicking and dragging the arrows at the far left of the ruler to the indent position you wish to use. Click and drag the top arrow back to the left margin. The text in that paragraph will now have a hanging indent.

MOVING BETWEEN PAGES OF THE FORM

You can move to the next or previous page at any time manually. To do this, select the page you want to use from the View Menu or click on the page controls at the bottom of the screen.

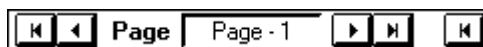
The View Menu allows you to quickly move to any page of the currently displayed form. Click on a page to move to it.

⇒ **To move between pages of the forms:**

Select a page from the View Menu.

Page Indicator

The Page Indicator at the bottom left of the *Quick & Easy* screen gives you shortcuts to viewing different pages of the form currently displayed.



Click to change the page being viewed.

The Page indicator allows you to change pages in two ways. The arrow buttons allow you to move to the first page, to the previous page, to the next page or to the last page. The page indicator, when clicked with the mouse, pops-up a menu of pages (a menu that looks like the View menu). Click on a page to move to it.

These choices allow you to either start at the beginning of the form with page 1 and work your way through each page or move directly to a specific page and fill out the form in any order you choose.

EDITING KEYS

The keys used to enter and edit information in *Quick & Easy* are as follows:

Cursor Movement

- The Right and Left arrow keys move the cursor within the field.
- HOME and END take you to the beginning and end of the text typed into the field.
- CTRL+HOME and CTRL+END go to the first/last line of word processor text.
- TAB and SHIFT+TAB move you to the next and previous fields.
- CTRL+ENTER inserts a page break in a word processing area.
- F7 and F8 move you backward and forward out of the word processing areas to the previous or next field on the page.

Editing

- DEL deletes the character above the cursor.
- BACKSPACE moves the cursor to the left and erases.
- SPACEBAR toggles X and space in all check boxes and executes the action of command buttons.
- Scroll bars move the screen right and left or up and down.

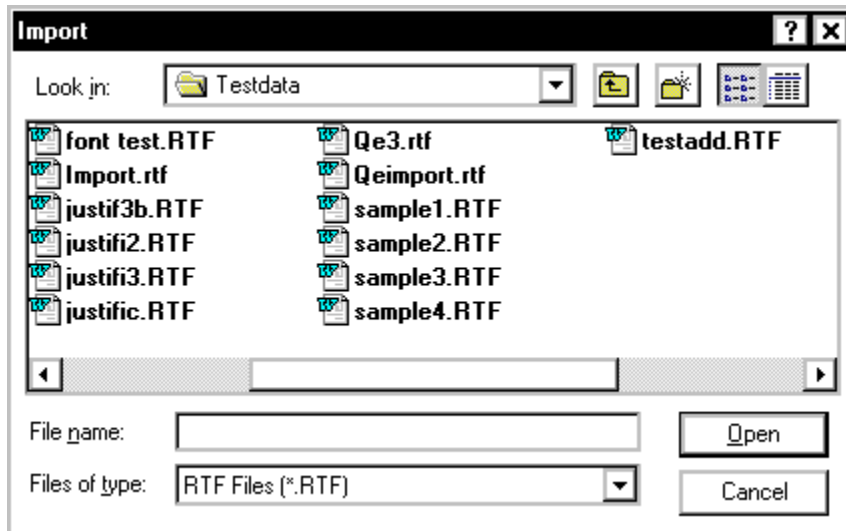
IMPORTING DATA

With *Quick & Easy* it's easy to import data into the word processing areas, questions that allow a block of text to continue beyond what fits on the original page. Any ASCII file (DOS text, no formatting) or RTF file (Rich Text Format) can be imported.

Almost any word processor can export DOS text. Most Windows word processors can export both TXT and RTF files. If you want to

import data from any other program into *Quick & Easy's* word processing areas, follow these general rules:

- Save text for each answer in a separate file.
- Save the text in either ASCII or RTF format (file extensions TXT or RTF).
- Place your cursor where you want the imported text to be inserted.
- Choose Import Text (ALT,F,I) from the File Menu to select a file to insert.
- You will see the Import Text dialog box.



Select "Files of Type" to choose the type to import.

⇒ **To select a file type to import:**

1. Click on the arrow to the right of List Files of Type to see the available choices.
2. Select either TEXT or RTF, depending upon the type of file you want to import. TEXT files will probably end with the extension *.TXT, and RTF files will usually have the extension *.RTF.

⇒ **To select a text file to import:**

1. Double-click on the name of the file you want to open.
-OR-
 1. Move to the File Name field.
 2. Type in the name of the file you want to import or use your up and down arrow keys to highlight the file you want to

open in the list of files, then press ENTER.

Notes:

You can only import text into word processing areas. You must save your text for word processing areas all in separate text files in order to import the data into *Quick & Easy*. While working in the word processor you use to create the text, save each answer in a separate text or RTF file. (Otherwise you will have to cut and paste blocks of text after the import.)

USING THE CLIPBOARD

The Clipboard is the temporary holding place for information when using Windows. It allows you to copy or remove text, then insert it elsewhere in that file, a different file or even a separate Windows application.

Cut, Copy and Paste Text

You can Cut, Copy and Paste text to or from the clipboard. These commands, found on the Edit Menu and on the toolbar, allow you to copy, insert, delete and move blocks of text in the word processing areas and all other fields of *Quick & Easy*.

⇒ **To mark text to be Cut or Copied:**

1. Hold down the SHIFT key and use the up, down, left and right arrow keys or click and drag with your mouse to highlight a block of text. Using combinations of the keys CTRL, HOME, END and the arrows with SHIFT will allow you to select a word, line or entire answer quickly. You can also select text by clicking and dragging the mouse over the top of it until it is highlighted.
2. After the text is highlighted, choose Cut (CTRL+X) to remove it or Copy (CTRL +C) to make a copy of it without removing it. You can now move to another page or Windows application and Paste (CTRL +V) the text you cut or copied.

Example - Moving Text

1. Click and drag your mouse over the text you want to move. (This should highlight the text).
2. Click the Cut icon or press CTRL+X to delete the block of text from its current position. The text will be placed on the Windows clipboard.
3. Move the cursor to the location where you want to insert the block of text.

4. Use the Paste (CTRL+V) command on the Edit Menu to insert the block of text into its new position.

Changing Options

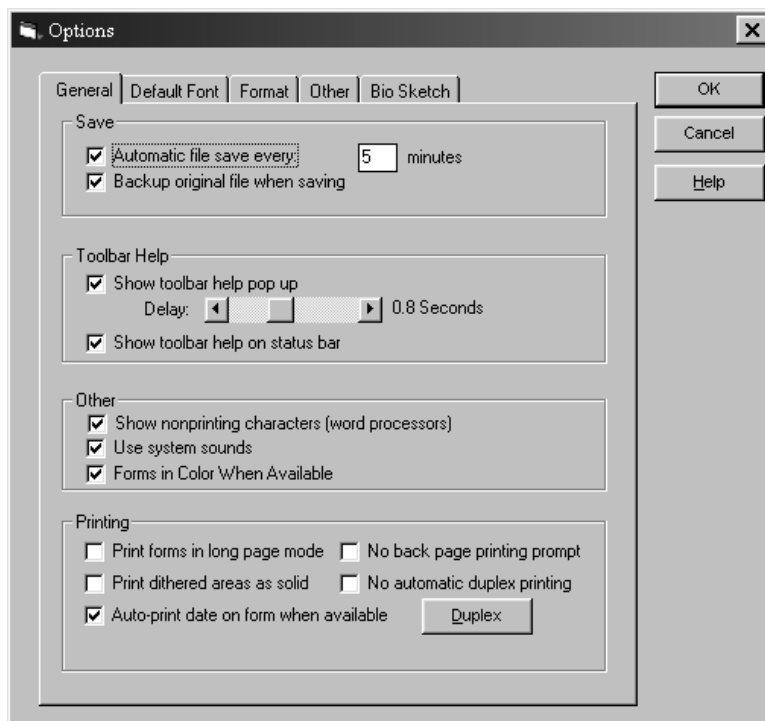
DEFAULTS

ALT,T,O

Before starting to use *Quick & Easy* you may want to set options. Choose Options from the Tools Menu to set program defaults. All options in this dialog apply to all forms and all program options except those on the form specific tab. Options on the tab specific to the current form, only affect all of that form's files. For example, if you select to print question #10 of a particular form as an attachment, every time you open a file or create a new file of that same form, question #10 will print as an attachment.

CHANGING OPTIONS

You can change program defaults by selecting Options (ALT,T,O) from the Tools menu.



General Options in *Quick & Easy*

General Options

Save

There are several safety measures in *Quick & Easy* to ensure that your data files are saved. You should save your data periodically as you work and use the automatic save and backup options to provide help in case of power loss or exiting without saving data.

Choose **Automatic File Save** and type in the number of minutes you want *Quick & Easy* to wait between saves.

Choose **Backup Original File when Saving** to always have a backup of your data file. Both of these options should be turned on at all times to provide the greatest security for your data.

Toolbar Help

Help for Toolbar icons can be shown as pop-ups when your mouse cursor passes over them and as a descriptive line on the status bar. If you want to show Toolbar help as a pop-up, you can select the time you want *Quick & Easy* to wait before displaying the pop-up. The number of seconds that will elapse before displaying help is shown. This is the amount of time your mouse cursor has to pause over an icon in order to see the pop-up help associated with it.

Other

Select **Show Non-printing Characters** (word processor) to see ends of paragraph marks, tabs and character spaces in the word processing areas.

Use System Sounds, when selected, uses the standard system warning sounds. If you disable this option, you will not hear system sounds when using *Quick & Easy*.

Forms in Color When Available allows you to print the lines and text of each form in the color of the original form when you print to a color printer. The information you type will print in black.

Printing

Print Forms in Long Page Mode was designed to force DeskJet and other ink printers to use more of the page when printing. Many of these printers require a 0.5" or 0.67" margin at the bottom of pages printed. When printing certain forms, this margin is too large. You will most likely not need this option with most forms.

Auto-Print Date on Form When Available can be used if you want the current date to print on forms that ask for it. You will usually type the date that prints. Very few forms support the auto-

print date feature.

No Back Page Printing Prompt should be selected if you want forms to print continuously on the front side only of paper. If this option is not selected, *Quick & Easy* will prompt you to insert pages whenever you print a form that has information that would usually appear on the back.

No Automatic Duplex Printing should be selected if your printer is not a duplex printer, but *Quick & Easy* tries to print forms in duplex mode.

Duplex button should be selected to correct duplex printing if the back of the page prints upside-down. There are two settings – horizontal and vertical. Try the setting not currently in use if your back page is printing upside-down.

Default Font Options

Quick & Easy allows you to choose a default font that will be used whenever you create a new file or add a new answer. You can also change the font of fields in the current document.

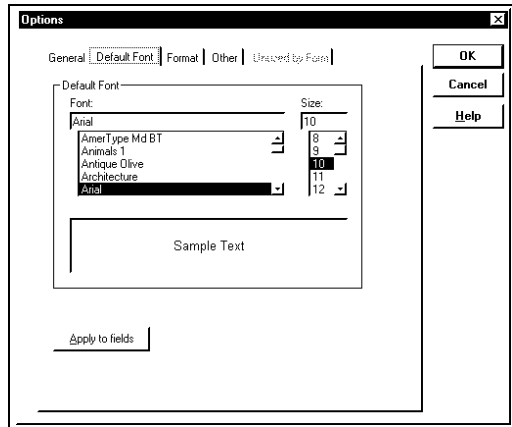
Choose Options (ALT,T,O) from the Tools Menu. Choose the Default Font tab to change the default font. The default font you choose will be used when creating a new file, opening a file from certain older versions of *Quick & Easy* or creating a new answer to a multiple answer question.

Use the font and font size lists to select the font that will automatically be used whenever you create a new form. It is best to select something readable like Arial or Times New Roman.

Apply to Fields

Note: Apply to Fields only changes fonts and font sizes in the **fields** of the form. Word processing text will not be changed to the new default font. To change the font in the word processing areas, you must manually highlight all text in each word processing area and select the font you want to use.

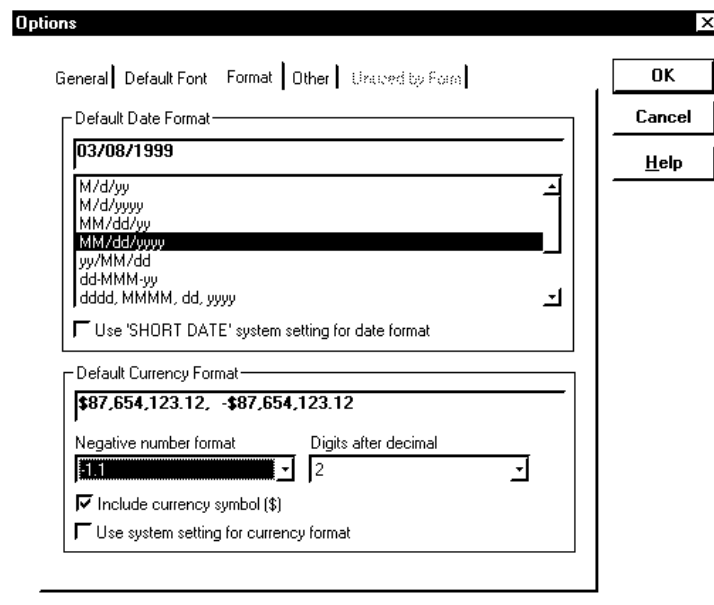
Select Apply to Fields to change the font in all fields to the new default. When you do this the font and font size of all fields will be changed. Fields in which you have used Bold, Italics and Underline will be changed to have no attributes; i.e., no bold, italics or underline.



Default Font Options

Format Options

The Format tab allows you to select the date and currency formats you prefer. These formats will automatically change data you type in date or currency fields on the forms. Keep in mind that many forms require the four-digit year format.



Select a date and currency format to use.

Note: It is best to use a four-digit year format even when a form does not require it.

You can select to use the settings selected in Windows (Control Panel) or you can turn off the check boxes for using Windows

settings and select your own format. You can select a format for the date, for number of decimal places in currency fields and for negative amounts. Remember these settings will only control fields on the forms set as date or currency fields.

Other Options

The Other tab allows you to select your Fax and the color of Hot Spot text.

Fax Drivers

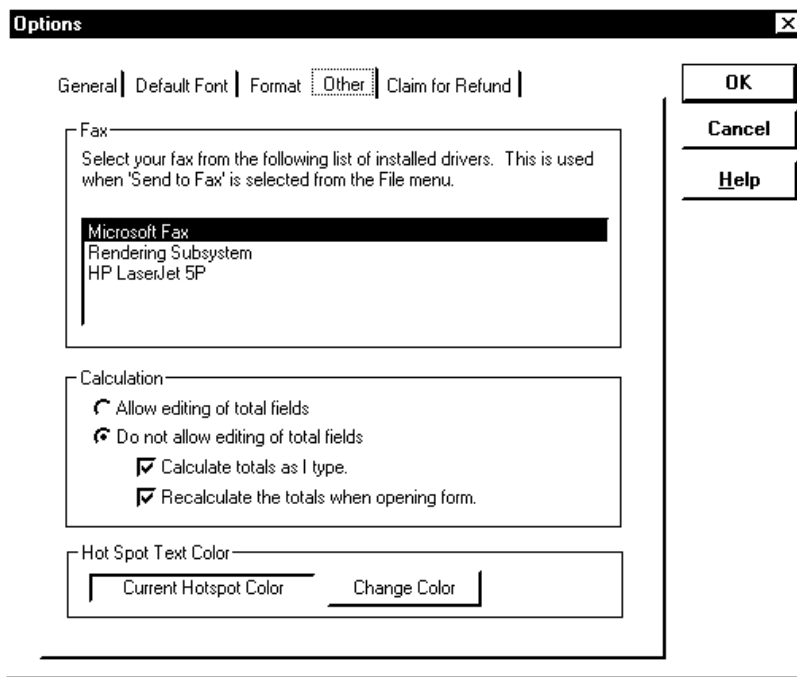
Select your Fax from the list of printers and Fax devices. "Microsoft Fax" should be in the list if you have configured your Fax to work with Windows. Select your Fax from the list. Choose Send to fax on the File menu to send the current form.

Calculation Options

Several calculation options allow you to decide how calculations will be performed. You can even turn off all totals in the forms. If you turn off calculations, you will be able to type into each total field. Otherwise, total fields are automatically calculated and cannot be typed into. You can have totals calculate automatically as you type, and you can recalculate all totals on each form when it is opened.

Hot Spot Text

Hot spot text color allows you to tell *Quick & Easy* what color to use when displaying text that can be clicked to circle it, cross it out or strike it out. This does not affect the color of the hot spot text when it prints. It only changes the color on screen to make it easier for you to see.

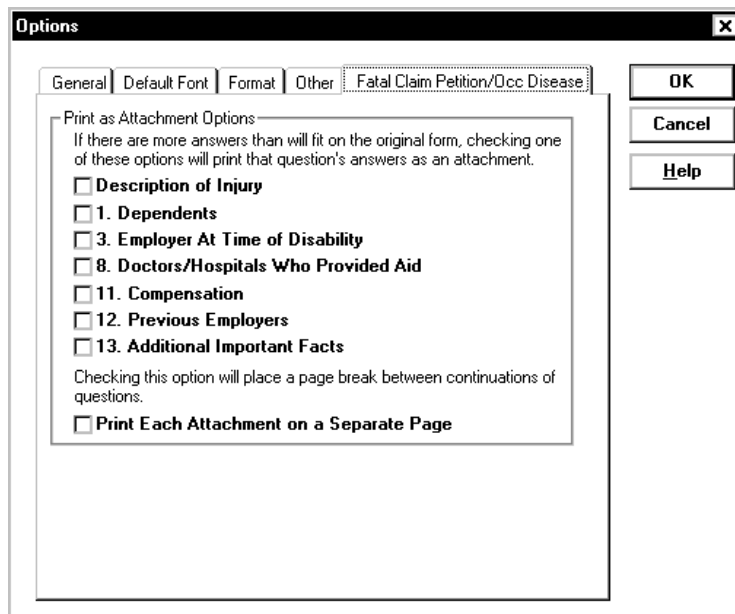


Change Fax, Calculation or Hot Spot options.

Note: The hotspot text will print in its normal color, not the color you select for hotspot text.

Form Specific Options

Form specific options change to reflect options available for the type of form currently displayed. Most forms will have different options that affect printing. Making changes to options selected for a type of form will be remembered the next time a form of that type is opened or created.



Form-specific Options

Print as Attachment Options

Answers to multiple answer questions or questions with word processing answers can be printed as attachments if their text is longer than the space allotted on the form or if there are more answers than will fit on the form. Each multiple answer and word processing question is listed and has a check box.

If the check box is selected and there are more answers to a multi-answer question than will fit on the form, all answers will be placed on a continuation page. On the original form it will say "See Attachment." If you do not select these check boxes, answers that fit on the original page of the form will print on the original page and an attachment will be printed containing other answers to each question that didn't fit.

In certain questions requiring one long answer (word processing answers), a short amount of text can fit on the original form. If you choose to print this type of question as an attachment and the text is too long to fit on the form, a continuation page will be generated showing the entire answer, and "See Attachment" will print in the space available on the original form. If you do not select this option, your answer will start printing in the space provided on the original page of the form and any text in this answer that does not fit in the space allowed will print on a continuation page.

Print Each Attachment on a Separate Page

Use this option to select how to print continuations to multiple

answer questions and word processing areas on the form. If there is more text than will fit in the space provided, *Quick & Easy* generates an attachment. If you want each attachment; (i.e., each answer's continuations) to print on a separate page, select this check box. If you do not select this check box, the attachments will be printed continuously without a page break between each answer.

Questions that Require Long Answers or More than One Answer

If a question requires a description or other answer that is longer than the space allowed on the form, a word processor may be available on the form. In a word processing area, you can type as much text as you need and you have many formatting options available.

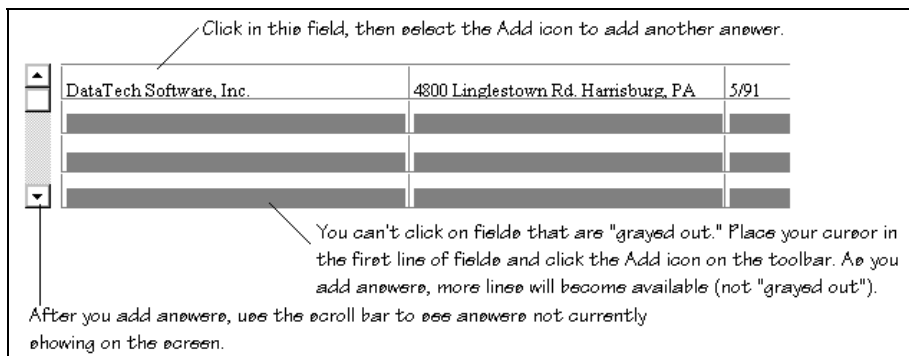
If a question is likely to need more than one answer, *Quick & Easy* will allow you to enter multiple answers to the question. Multiple answer questions in *Quick & Easy* allow an unlimited number of answers. You can Add, Insert, Delete or Arrange answers in a multiple answer question.

ADDING AN ANSWER AFTER OTHER ANSWERS



Click the Add icon to add an answer after all others.

You can add an answer by clicking the Add button on the toolbar or selecting Add (ALT,E,A) from the Edit menu. In order to select Add, your cursor must first be placed in a field of the multiple answer question to which you want to create a new answer. When selected, Add will place a new answer at the end of all existing answers in the current multiple answer question.



You can't click on fields that are "grayed out."

INSERTING ANSWERS BETWEEN OR BEFORE OTHER ANSWERS



Click to insert answer at cursor position.

Occasionally you will find that it becomes necessary to insert a new answer before or between existing answers.

⇒ **To insert an answer:**

1. Place your cursor in the answer you want to be directly after the answer you insert.
2. Choose Insert Answer (ALT,E,I) from the Edit menu or click the Insert icon on the toolbar.

Examples:

- If you want to insert an answer between answers #5 and #6, click your mouse on a field in answer #6 and select Insert an Answer (ALT,E,I). You will see a new, blank #6 and the old answer #6 and all following answers will be renumbered automatically from #7 to the last answer.
- If you want to insert an answer in position #2, go to current answer #2 and select Insert an Answer (ALT,E,I). You will see a new blank answer #2 and the old #2 will become #3. The old #3 will become #4 and so on.

MOVING BETWEEN ANSWERS

After you have typed a few answers to a question, you may wish to view or edit other answers to the same question.

In multiple answer questions where information is typed into a table or grid, moving between answers is done with:

- UP and DOWN ARROW KEYS - moves you to the next or previous answer
- PGUP and PGDN - moves you through answers one screen at a time
- CTRL+HOME and CTRL+END - moves you to first or last answer
- SCROLL BAR - scrolls you through all answers

In some questions, answers are displayed on more than one page.

You can use the arrows on the bottom left of the screen to move through all pages of the forms. You can move directly to a particular page by selecting it from the View menu or the pop-up menu on the status bar (click on the page number on the bottom left of your screen to see a menu of all pages of the form).

If answers to a question are displayed on the same page, you can use the vertical scroll bar to move from one answer to the next on the same page.

DELETING ANSWERS

In *Quick & Easy*, move your cursor to the answer you want to delete, then select the Delete Answer menu command (ALT,E,D) or toolbar icon.



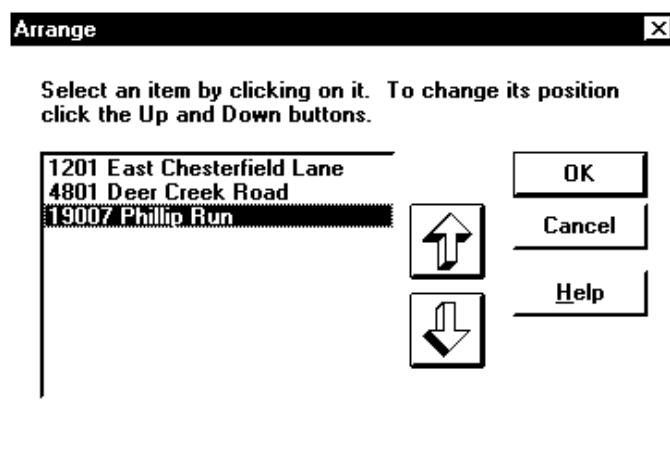
Click to remove answer at cursor position.

You will be asked to verify that you want to delete the answer. If you select 'Yes', the answer will be deleted and all subsequent answers will be renumbered. If you select 'No' then the answer will not be deleted.

Example: If you delete answer #2 then #3 will become #2 and #4 will become #3, and so on.

ARRANGING ANSWERS TO A MULTIPLE ANSWER QUESTION

Some questions on the form may require more than one answer. The answers to these questions can be rearranged in any order while editing the file. The order that you select for the answers is the order in which they will print.



Click the arrow buttons to arrange answers.

⇒ **To change the order of answers to a multiple answer question:**

1. Place your cursor in any answer of the question you want to arrange.
2. Choose Arrange (ALT,E,R) from the Edit Menu or click on the Arrange icon on the toolbar.
3. In the Arrange dialog box, click on the answer you want to rearrange.
4. Click the up and down arrow buttons to change the selected answer's position relative to the positions of other answers to the question.
5. Click on all other answers you want to re-order. As you click each one, use the arrow buttons to move the selected answer up or down in the list.
6. Select OK to save your changes.
7. Select Cancel to return the answers to the order they were in previously.

WORD PROCESSORS

While most questions on a form can be answered easily with just one or two words or a short phrase, some sections require complex, multi-line answers. These are called word processing answers throughout this manual and the on-line help.

Word processors are placed on the form in places where an answer that could be longer than the space allowed on the form is likely. You can keep typing your answer until you have completely answered the question. At print time, text will be placed on the form

and what doesn't fit will be automatically formatted and placed on a continuation page.

In order to make these answers easier to write and more pleasant to review, *Quick & Easy* provides full word processor functions including word wrap; copy, cut and paste; four different paragraph alignments - left, right, centered and justified; different fonts and point sizes; bullets; bold; italics and underline; and line spacing - single, 1 1/2, and double.

Some word processing areas have very limited space available on the original page of the form. Click the Zoom icon on the toolbar to expand the word processing area to fill the screen. This will allow you to see more of your text at one time and therefore make editing easier.

You can type as much text as you need into a word processing area. Just keep typing and *Quick & Easy* will automatically calculate what fits on the original form. The rest of the text will be printed on a continuation page.

Editing in the Word Processor

Editing keys are used to move your cursor around within the document and to perform basic insertion and deletion of characters. All of the standard editing keys are supported.

HOME	Moves the cursor to the beginning of the current line.
END	Moves the cursor to the end of the current line.
CTRL+HOME	Moves the cursor to beginning of the text in the current answer.
CTRL+END	Moves the cursor to the end of the text in the current answer.
CTRL+LEFT ARROW	Moves the cursor left one word.
CTRL+RIGHT ARROW	Moves the cursor right one word.
F7	Moves you backward in the tab order out of the word processing area.
F8	Moves you forward in the tab order out of the word processing area.
SHIFT+ARROW	Highlights (selects) the text.

Changing the Appearance of Text

Most fields in *Quick & Easy* allow you to change the font, font size and font attributes (bold, italics and underline). The word processing areas also allow you to change line spacing and alignment and to use bullets.

Icons are available for most menu commands that affect font appearance. Click an icon on the Toolbar or select a menu command from the Format Menu when your cursor is in the field or when the text in the word processor that you want to change is highlighted.

There are many features available for changing the appearance of text in the fields and in the word processor. There are many other features that serve as tools to make adding and editing information easier.

The following options are available to change the appearance of text in the fields and word processing areas:

- Bold
- Font
- Font size
- Italics
- Underline

The following additional options are available to change the appearance of text in the word processing areas only:

- Bullets
- Left, Right, Centered and Justified Alignment
- Single, One and One-Half and Double Line Spacing

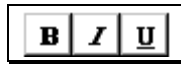
MAKING TEXT BOLD, ITALICIZED OR UNDERLINED

Each individual field can have its own font, point size and style. However, all text within any given field must be the same font, size and style.

⇒ **To make text bold, italicized or underlined:**

1. Place your cursor in the field you want to change.

2. Click on the icon for bold, italics or underlining on the toolbar.



Click an icon for bold, italics or underline.

-OR-

Choose Bold, Italics or Underline from the Format Menu.

-OR-

Press a Control key combination:

Bold CTRL+B

Italics CTRL+I

Underline CTRL+U

⇒ **In the word processing answers:**

1. Highlight the exact text you want to change. (Everything that is highlighted will be changed.)
2. Choose Bold, Italics or Underline from the Format Menu.

-OR-

Click the icon on the toolbar.

-OR-

Press a Control key combination:

Bold CTRL+B

Italics CTRL+I

Underline CTRL+U

CHANGING THE FONT STYLE OR SIZE

There are two ways to change fonts in *Quick & Easy*. You can choose a font using the font and font size drop-down lists on the toolbar or by selecting Fonts from the Format Menu.

If your cursor is in any field on the form, changing the font will change all text in the field to the new font. If your cursor is in a word processing area, font changes affect only highlighted text.

If you want to change the font used throughout a form, you can change the default font by selecting Options on the Tools Menu.

Font Drop-down List

Use the font drop-down list on the toolbar to change the font of text in the current field or text highlighted in the word processor. All fonts available are listed in the drop-down list. Click on the arrow to the right of the list with your mouse and choose the font you want to use.

To change fonts using your keyboard, choose Fonts from the Format menu.

NOTE: Fonts in the drop-down list are the fonts available using the currently selected default printer.

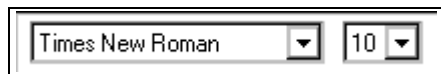
Font Size Drop-down List

Use the font size drop-down list on the toolbar to change the size of text in the current field or text highlighted in the word processor. All sizes available for the current font are listed in the drop-down list. Click on the arrow to the right of the list with your mouse and choose the size you want to use.

To change font size using your keyboard, choose Fonts from the Format menu.

⇒ **To change the font of a given field:**

1. Place your cursor in the field you want to change.
2. Choose the font or point size drop-down list from the Toolbar.



Click on the font or point size drop-down list on the toolbar.

-OR-

1. Choose Font from the Format Menu.
2. Select the font you want to use in this field.

⇒ **To change the font in the word processing area:**

1. Highlight all text you want to change.
2. Choose Font (ALT,O,F) from the Format Menu.

-OR-

3. Choose the Font drop-down list on the toolbar.

Changing the Default Font

Quick & Easy allows you to choose a default font that will be used

whenever you create a new file or add a new answer. You can also change the font of all fields in the current document.

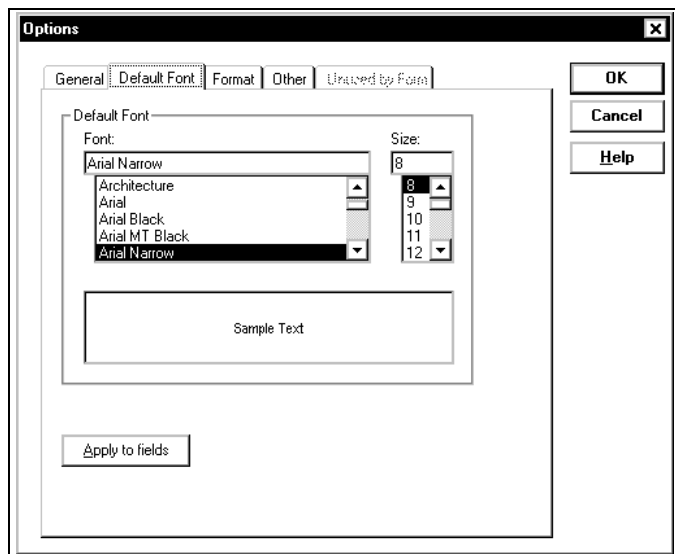
Choose Options (ALT,T,O) from the Tools Menu. Choose the Default Font tab to change the default font. This default font will be used when creating a new file, opening a file from certain older versions of *Quick & Easy* or creating a new answer to a multiple answer question.

Default Font Options

Use the font and font size lists to select the font which will automatically be used whenever you create a new form or create a new answer to a multiple answer question.

Apply to Fields

Select Apply to Fields to change the font in all fields to the new default. When you do this the font and font size are changed. Fields in which you have used Bold, Italics and Underline will lose all attributes; i.e., bold, italics and underlining will be removed.



Set the default font to be used on your forms.

Note:

When you click the Apply to fields button, only the fonts and font sizes in the fields of the form will change. Word processing text will not be changed to the new default font. To change the font in the word processing areas, you must manually highlight all text in each word processing area and select the font you want to use.

Changing the Placement of Text in the Word Processors

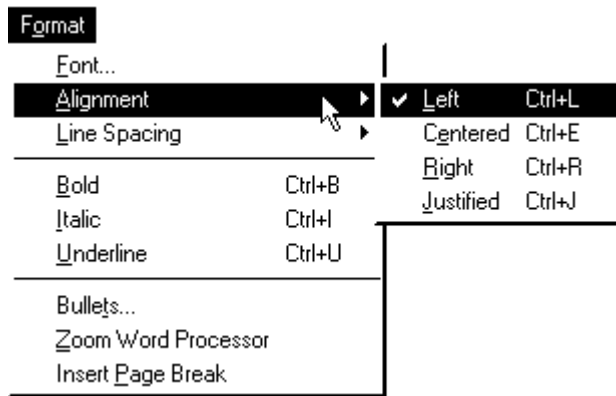
The features available in the word processing areas provide you with the flexibility to format the information on your forms in an easy-to-read, eye-appealing style. If you use the tools available, you can create a professional form that's sure to get results.

This section explains the options available in the word processing areas to format the placement of your text.

The following features are supported:

- Bold, Italics and Underlining
- Various Fonts and Font Sizes
- Bulleted lists
- Centered alignment
- Columns (using tabs)
- Justified alignment
- Left alignment
- Right alignment
- Single line spacing
- Double line spacing
- One and one half line spacing

ALIGNMENT



Alignment Menu

Alignment determines where the text prints with respect to the margins. Alignment changes are only available in the word processing areas of *Quick & Easy*. All other fields will automatically be left aligned.

Place your cursor in the paragraph of text you want to align and choose an alignment to apply. Alignment can be chosen from the Toolbar or the Format Menu. A change will affect the alignment of the entire paragraph.

Left



Left alignment allows you to have a straight left margin and a jagged right margin, as you would normally expect from a typewriter. This alignment is the default for *Quick & Easy's* word processor. Therefore, if you want to use a different alignment, you will need to select it from the Toolbar or Format Menu.

Right



Right alignment gives you a straight right margin and a jagged left margin.

Center



Centering places text in the paragraph midway between the right

and left margins. The centering feature is made available primarily for creating headings.

Justify

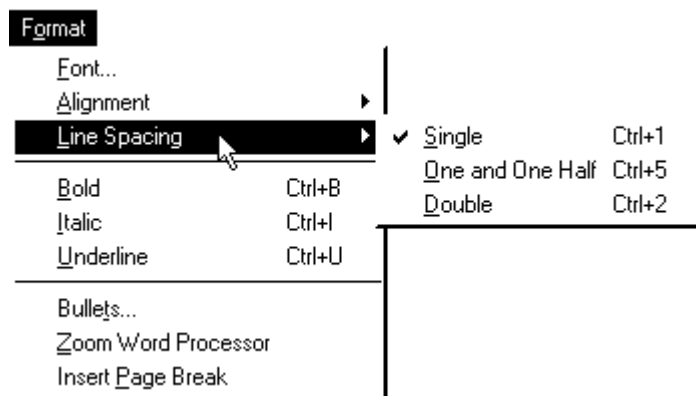
CTRL+J



Select Justify to have a straight left and right margin. When the text prints, it will be aligned along both the left and right margins.

CHOOSING LINE SPACING FOR TEXT

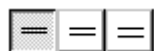
There are three different line spacing settings available: Single, One and One Half and Double. Line Spacing choices affect the entire paragraph and can only be selected when in a word processing area.



Line Spacing Menu

You can choose a paragraph's line spacing by highlighting the paragraph and then clicking on the line spacing button of your choice on the Toolbar. You can also select Line Spacing from the Format Menu.

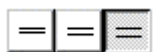
The access keys and toolbar icons for line spacing are:



CTRL+1 Single line spacing



CTRL+5 One and One Half line spacing



CTRL+2 Double line spacing

BULLETS

Many people like to create bulleted lists in word processing areas to emphasize certain lines of text. You can insert bullets into *Quick & Easy's* word processing areas.

Editing Bulleted Text

Quick & Easy allows you to insert a bullet by clicking on the bullet icon on the toolbar. Hanging Indents will be created when you insert a bullet. If you want to remove a bullet, you can do so by clicking on the bullet icon a second time.

Indenting and Columns

Use Tabs in the word processor to set up columns of text.

To set up columns, type text, then press TAB and type in a second column of text. Reproduce this spacing on subsequent lines.

You can manually set Tab widths using your mouse and the ruler at the top of each word processing area. Click on the ruler with your mouse to set a tab stop. If the amount of space allowed for the word processor is small, click Zoom to see the ruler.

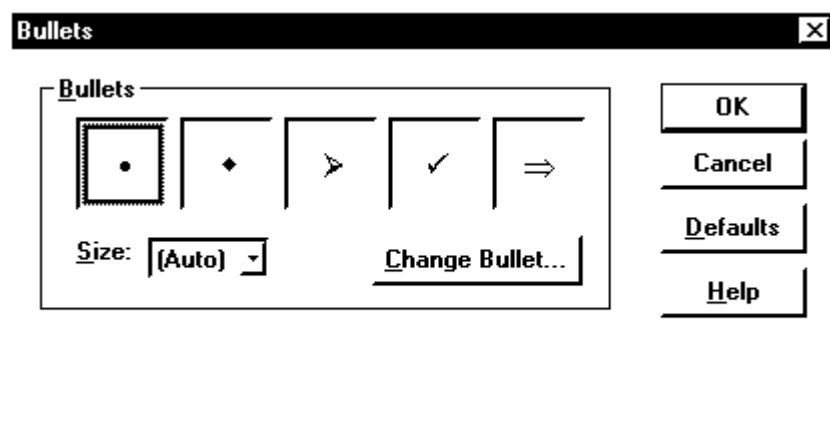
Tabs placed on the ruler will affect only the current paragraph. If more than one paragraph is highlighted, the settings will affect all paragraphs that are highlighted.

⇒ To manually insert or delete tabs:

1. Place your cursor in the paragraph of text you want to change, or highlight all paragraphs you want to change.
2. Insert a tab stop by clicking on the ruler at the location at which you want to insert a tab stop.
3. Move the tab stop by clicking on the tab mark and dragging it to a different location on the ruler.
4. Delete a tab stop by clicking on a tab mark and dragging it off the bottom of the ruler. You will see the tab mark disappear when you do this.

Selecting a Bullet Character

There are five default bullet characters in *Quick & Easy*. Bullets are only available when you are working in a word processing area. Each time you click the Bullets icon on the Toolbar, the default bullet will be inserted before the current paragraph.



Select Bullet in *Quick & Easy*

You select a bullet character by choosing Bullets (ALT,O,T) from the Format Menu. Click on one of the five default bullet characters and click OK to select the bullet character you wish to use. You can change the bullet character as many times as you want, however this will affect only bullets inserted after the change is made.

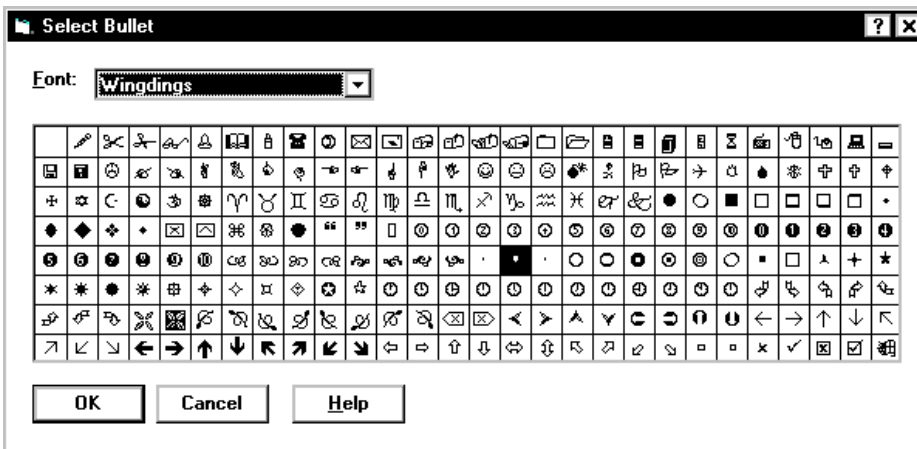
If your cursor is in a word processing area when you select Bullets from the Format menu, a bullet will be inserted at the beginning of the current paragraph when you click OK in the Bullets dialog box. If your cursor is in a field, a bullet will not be inserted since bullets are not available in the fields of the form.

If you do not wish to use any of the five default bullets, click the Change Bullet button in the Bullets dialog box to choose the bullet you wish to use.

Choosing a Font for Bullets

You can use one of the five default bullet characters or choose a different bullet to use. Once you choose a bullet character to use, that character will be inserted each time your cursor is in a word processing area and you click the bullets icon on the Toolbar.

You select a bullet character by choosing Bullets (ALT,O,T) from the Format menu. Click on the Change Bullet button to select a bullet character other than one of the five defaults shown. You can change the bullet character as many times as you want, however this will affect only bullets inserted after the change is made.



Click on the character you want to use as a bullet.

The Change Bullet dialog box allows you to select a character from any of the graphical fonts available to the currently selected printer. Use the font drop-down list to select the graphical font you wish to use. The characters of that font will be shown. Click on the bullet character you wish to use for a bullet and choose OK.

One of the five default bullet characters will be replaced by the bullet you select. You can change each of the five default bullet characters by highlighting each one and selecting the Change Bullet command button. Choose OK to use the currently highlighted bullet.

If your cursor is in a word processing area when you select Bullets from the Format Menu, a bullet will be inserted at the beginning of the current paragraph when you click OK in the Bullets dialog box. If your cursor is in a field, a bullet will not be inserted since bullets are not available in the fields of the form.

Note: At any time you can return all five bullets to their original default characters by selecting the Defaults command button in the Bullets dialog box.

If there are a large number of fonts installed on your computer, it may take a long time for the Bullets dialog to load.

Find & Replace / Spell Checker

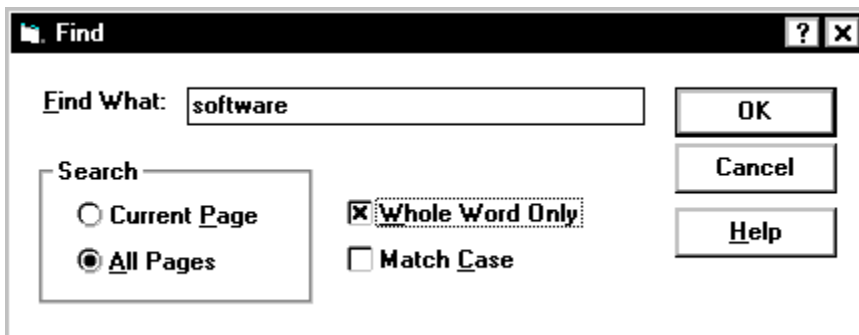
FIND & REPLACE

You can use Find (CTRL+F) to quickly locate certain strings of text. You can search all fields in the form and the word processing areas for text.

To change a word or phrase, select Replace (ALT,E,E). These features will help you quickly locate specific text in your form or easily track down a particular word or phrase that needs to be changed or reviewed.

Finding Text in Your Form

Find and Find Next allow you to quickly search for all occurrences of certain characters or words in your forms or resume. Choose Find (CTRL+F) from the Edit menu and type in the text for which you want to search. Click the OK button to begin searching for the text. After the first occurrence of the text is found, choose Find Next (F3) from the Edit menu to find the next occurrence of the same text.



Select Current Page or All Pages

There are several options that you can use to define your search:

You can choose to search the text on the **Current Page** or on **All Pages**.

Whole Word Only requires that the found string of text must match the Find What phrase exactly. In other words, if Whole Word Only is selected and "Bullet" is typed into the Find What field, "bullet" and "Bullet" will be the only text found in the document. If Whole Word Only is not selected, any other occurrence of the letters "b-u-l-l-e-t" will be found, including "bullets," "Bullets," "bulleting,"

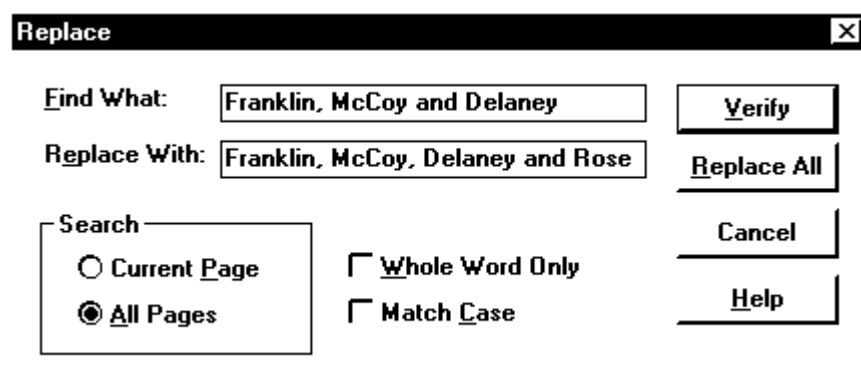
etc.

You can select **Match Case** to find words using the same capitalization as the Find What text. In the example above, with Bullet typed into Find What, search would find only occurrences of "B-u-l-l-e-t" with the B capitalized.

If you want to find text and then replace it with different text, choose Replace instead of Find.

Replacing Text in Your Form

Replace allows you to quickly search for all occurrences of certain characters (Find What) or words in your forms or resume and replace them with other text (Replace With). Choose Replace (ALT,E,E) from the Edit menu and type in the text for which you want to search.



Replace in *Quick & Easy*

Verify

Click the Verify button to begin searching for the text. After an occurrence of the text is found, you will be asked if you want to replace it or not. After you choose Yes or No, the search will continue through the document, finding other occurrences of the text. Replace will continue searching through the document until you select Cancel or until the entire document has been searched.

Replace All

Select Replace All to automatically find all occurrences of the text and replace it with the text typed into Replace With.

There are several options which you can use to define your search.

You can choose to search the text on the **Current Page** or on **All Pages**.

Whole Word Only requires that the found string of text must

match the Find What phrase exactly. In other words, if Whole Word Only is selected and Bullet is typed into the Find What field, bullet and Bullet will be the only text found in the document. If Whole Word Only is not selected, bullets, Bullets and any other occurrence of the letters "b-u-l-l-e-t" will be found.

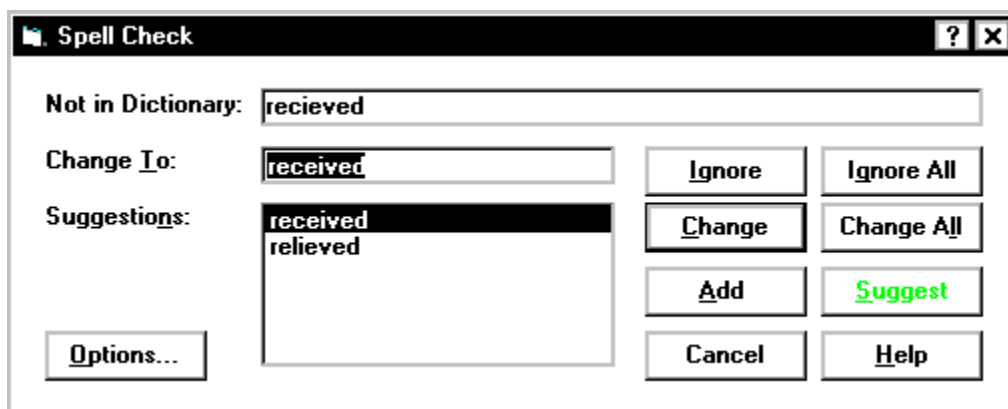
You can select **Match Case** to find words using the same capitalization as the Find What text. In the example above with Bullet typed into Find What, search would find only occurrences of B-u-l-l-e-t with the B capitalized.

THE SPELL CHECKER

The Spell Checker (ALT,T,S) can be accessed from the Tools Menu. It will allow you to verify the spelling of all words in your form or all words on the page you are currently using.

Checking the Spelling of Your Form

Choose Spell Check (ALT,T,S) from the Tools menu or click the Spell icon on the Toolbar to scan your resume or forms for spelling accuracy. Select the options you want to use when spell checking your document, then select OK to continue.



Select what to do with the misspelled word.

Words which Spell Check thinks are misspelled will appear in the Not in Dictionary field. You will see Suggested Words in many cases.

Ignore: Choose Ignore to skip the word not in the dictionary and keep spell checking the document.

Ignore All: Choose Ignore All to skip all occurrences of that word in the document and continue checking for other words not in the dictionary.

Change: Choose the Change button to replace the word not in the

dictionary with the word in the Change To field. You can also double-click on a Suggested Word to replace the word not in the dictionary. That occurrence of the misspelled word will be corrected.

Change All: Choose the Change All button to replace all occurrences of the misspelled word with the word in the Change To field.

Add: Choose Add to place the word found in the user dictionary. This means that this word will no longer be considered misspelled by the Spell Checker. It would be a good idea to add your name to the user dictionary and other words which will appear often in your forms and are not in the main dictionary.

Suggest: Choose Suggest to show suggestions for the word typed into the Change To field.

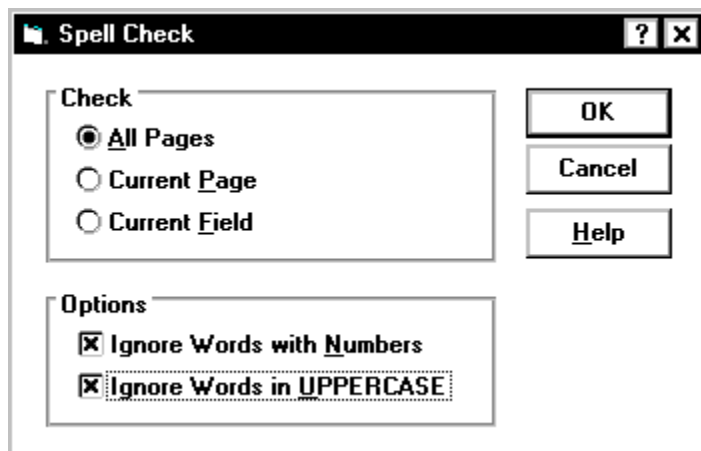
Cancel: Choose Cancel to quit spell checking. If you continue spell checking, spell check will tell you when it has completed searching the entire field / page / all pages.

Options: Choose Options to change settings such as Ignore Words with Numbers, Ignore Words in UPPERCASE and what text to check.

Setting Options for Spell Check

Check

Select to check **All Pages**, the **Current Page** or the **Current Field**. This is the text that will be scanned for spelling accuracy.



Set the options for spell checking.

Options

Select to **Ignore Words with Numbers** if you want to skip all words like 1st, 15th, etc.

Select **Ignore Words in UPPERCASE** to skip all words with all

capital letters. This will avoid spell checker telling you that state abbreviations and government acronyms are misspelled.

Printing and Faxing

Before printing your form, there are a few options you should consider. If you want to use a printer other than your Windows default printer, choose Print Setup to change the printer or options selected.

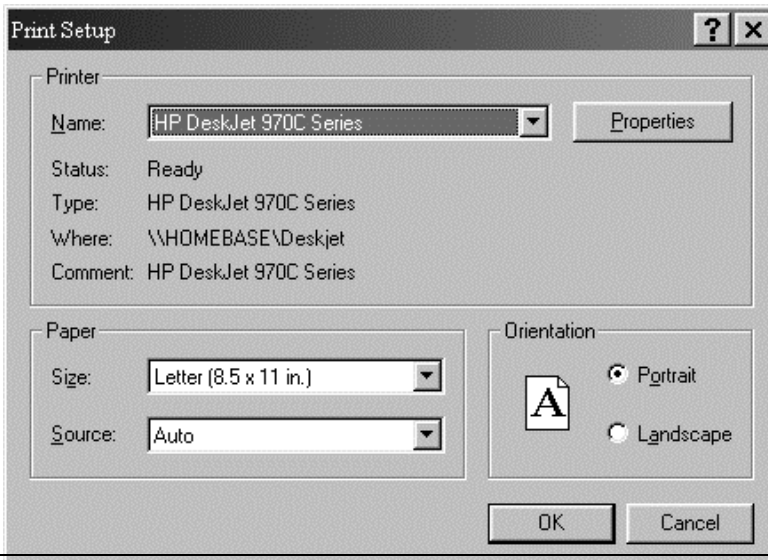
SETTING UP YOUR PRINTER

ALT,F,R

Print Setup allows you to choose a specific printer and options to use when printing your forms. You may change the orientation, printer, paper size and source, print range, print quality and number of copies, plus other printer-specific options.

You can print your forms using any printer set up to work with Windows. If you have a printer connected to your computer and you print from other Windows applications to it, you are ready to print with *Quick & Easy*. If you have several printers, choose Print Setup (ALT,F,R) to select the printer you want to use to print. If the printer has not been set up for use with Windows, see your Windows User's Manual for detailed instructions on adding a printer.

NOTE: You only have to select Print Setup if you want to use a printer other than the default or if you want to change any of the printer's options.



Choose from the list in Specific Printer to select a different printer.

Printer

Press ALT + up or down arrow to display all printers available. If the printer you want to use is not on this list, see your Windows User's Manual for instructions on installing another printer. If you select a printer other than the default printer, the Windows default printer will be changed to that specific printer.

Orientation

Most forms need to print in Portrait (ALT+R) orientation. Some may need to print in Landscape orientation. Make sure you select the correct orientation before printing.

Paper

Select the paper size that you will be using and other settings like upper or lower tray, manual feed or tractor feed. Most forms require 8 ½" x 11" paper, but others require 8 ½" x 14" paper.

When you are finished changing and viewing print setup options, select OK (by pressing ENTER) to save the current settings or select Cancel to revert all settings to their previous values.

PRINT OPTIONS

Quick & Easy gives you several additional print options. The options can be accessed by selecting Options (ALT,T,O) from the Tools Menu. When you open the Options dialog box, select the tab for the form you are currently using to change printing options. The options you select will affect all forms which are the same type as the one currently open.

Print as Attachment Options

Answers to multiple answer questions and word processing questions can be printed as attachments if their text is longer than the space allotted on the form or if there are more answers than will fit on the form. Each multiple answer and word processing question is listed and has a check box. If the check box is selected and there are more answers or more text than will fit on the form, all answers will be placed on a continuation page. On the original form it will say "See Attachment."

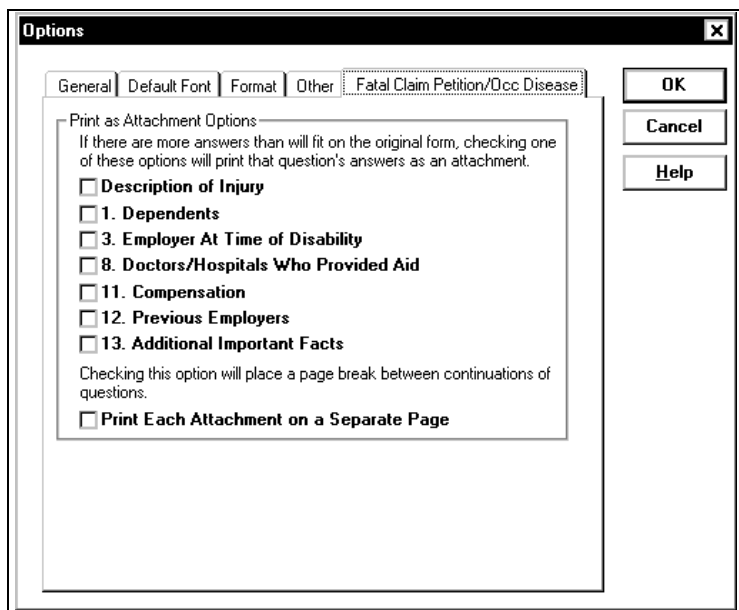
If you do not select these check boxes, answers that fit on the original page of the form will print on the original page and an

attachment will be printed containing other answers to each question that didn't fit.

In certain questions requiring one long answer (word processing answers), a short amount of text can fit on the original form. If you choose to print this type of question as an attachment and the text is too long to fit on the form, a continuation page will be generated showing the entire answer, and See Attachment will print in the space available on the original form. If you do not select this option, your answer will start printing in the space provided on the original page of the form and any text in this answer which does not fit in the space allowed will print on a continuation page.

Print Each Attachment on a Separate Page

Use this option to select how to print continuations to multiple answer questions on the form. If there is more text than will fit in the space provided, *Quick & Easy* generates an attachment. If you want each attachment; (i.e., each answer's continuations) to print on a separate page, select this check box. If you do not select this check box, the attachments will be printed continuously without a page break between each answer.



Choose options for printing.

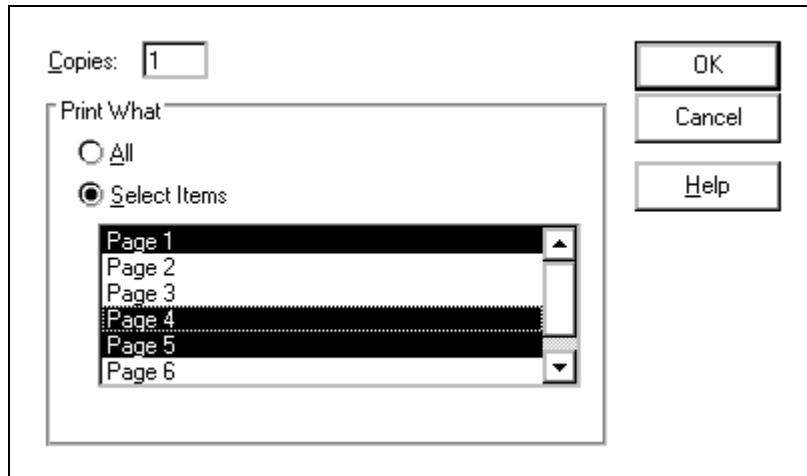
PRINTING THE CURRENT FORM

Select Print (CTRL+P) from the File Menu or Toolbar while working on

the form to bring up the Print dialog box.

Select all pages or a specific page to print. The page or pages you select will print directly to the printer selected under Print Setup.

Choose the number of copies you want to print by typing a number in the **Copies** field.



Print dialog box in *Quick & Easy*

All Pages: Choose All Pages to print all pages of the original form and all continuations.

Select Items: Choose Select Items, to select the exact pages of the form that you want to print. Continuation pages are not listed individually.

SELECTING SPECIFIC PAGES TO PRINT

To select the pages you want to print, choose Print (CTRL+P) from the File menu or click the Print icon on the Toolbar. Choose the Select Items option in the Print dialog box. Click on the page(s) you want to print and choose OK.

If you want to select more than one page from this list, use CTRL+click and SHIFT+click to highlight more than one page.

CTRL+click

Use CTRL+click if the pages you want to select are not next to each other in the list. To do this, press and hold the CTRL key. While continuing to hold down CTRL, click with your mouse on all pages you want to print. When you are finished selecting pages to print, release the CTRL key.

SHIFT+click

Use SHIFT+click if all pages you want to print are directly next to each other in the list. To do this, click with your mouse on the first page in the list that you want to print. Press and hold the SHIFT key. Move your cursor to the last page in the list that you want to print. While continuing to hold down SHIFT, click with your mouse. Release the SHIFT key. The first page you clicked on, the last page you clicked on and all pages in between those pages will be highlighted.

Choose **OK** to send the pages you wish to print to your currently selected printer.

RED DROP-OUT LINES AND BOXES

Some forms are designed to be read by a computer and therefore have red lines and boxes on them to show you where to type the text. These red markings on forms printed by the agencies are to assist you with positioning and are not required to be printed on the forms you submit. The forms that print with *Quick & Easy* are approved by their respective agencies and are submittable as they print on your laser printer. The text is already positioned in the correct place on the forms automatically.

DUPLEX PRINTING

Some forms are required to be submitted duplexed. Even if you don't have a duplex printer, *Quick & Easy* will help you print your forms correctly for submission.

If your printer is a duplex printer, *Quick & Easy* will automatically print the pages two-sided if the original form is two-sided. Otherwise you will be prompted to reinsert pages in order to print on their reverse. If you do not want any pages to be printed on both sides, turn on the option "No back page printing prompt" on the General tab of the Options dialog (Tools Menu).

⇒ **If your printer is not a duplex printer:**

1. Select Options from the Tools Menu.
2. Select the General options tab.
3. Make sure the check box No back page printing prompt is NOT selected.
4. Select No Automatic Duplex Printing.
5. Print All Pages.

6. If a page has another page that needs to print on its back side, you will see a prompt asking for you to reinsert a specific page.
 7. Go to the printer and reinsert the page so it will print on the back.
 8. Click OK to the prompt on your screen.
 9. The next page will print on the back of the page you insert.
- ⇒ **If your duplexed back page prints upside-down:**
1. Select Options on the Tools Menu.
 2. Go to the General Tab.
 3. Select the Duplex button. (It is available only when the check box No Automatic Duplex Printing is NOT selected.)
 4. Select whichever option (Horizontal or Vertical) is not selected.
 5. Click OK.
 6. Click OK to close the Options dialog.
 7. Print the form.

CANCELING A PRINT JOB

Click on the Cancel button with your mouse to stop printing the print job currently being sent to the printer.

FAXING THE CURRENT FORM

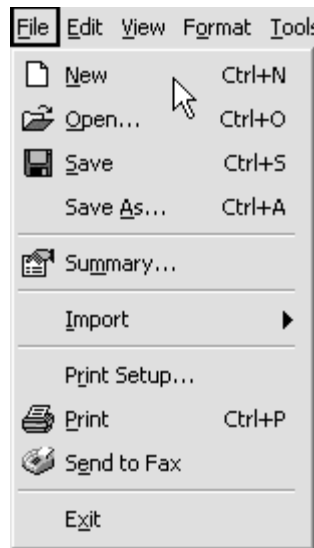
If you can fax documents from other Windows programs you should see the command "Send to FAX" on the File Menu. Select it and choose the pages you want to send. Send all pages or use the instructions for Selecting Specific Pages to Print earlier in this section to choose which pages you want to FAX.

If you have trouble sending your form, select Options from the Tools menu. The Other tab contains a list of drivers. Select your fax driver from the list of available drivers. If a fax driver is not listed here, *Quick & Easy* cannot send faxes using the current system configuration.

Menu Commands

Below is a brief summary of each menu's purpose, a picture of each menu and a description of all commands on each menu.

FILE MENU



File Menu in *Quick & Easy*

The File menu contains commands for file access, management and printing.

New

CTRL+N

Choose New to create a new file. Select the tab that holds the type of form you want to create. Click on a form or template name to create it.

Open

CTRL+O

Choose this menu command to open a form different from the one that is currently displayed on the screen.

Save

CTRL+S

Choose this menu command to save your form using the same file name as before. Save allows you to quickly save data. This is a protection for you from data loss. If this is a new file, you will see a dialog box allowing you to select a name for the file. If the file is not new and you want to save the file using a different name or location

(drive or folder), choose Save As.

Save As

ALT,F,A

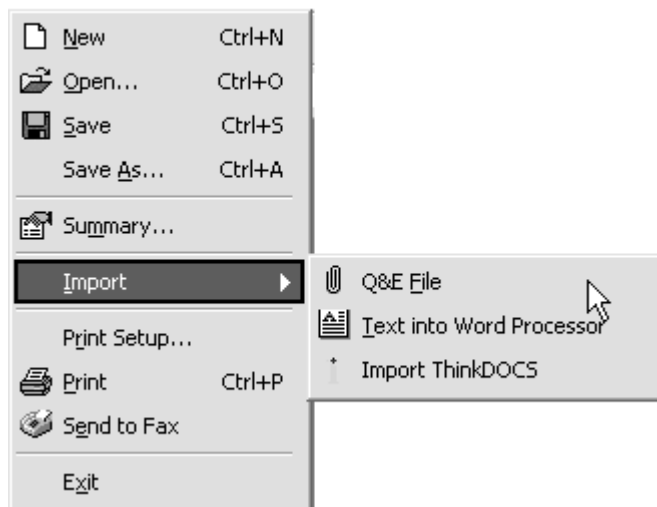
Choose this menu command to save a new file, to save a file under a different name, to save a file to a different location (different drive or folder) or to save a file as a template. If you save as a template you will be asked for summary information and the template will be added automatically to one of the lists of forms in New.

Summary Info.

Choose this menu command to type a comment, author's name, title and keywords to be saved with the currently open form. You will see the summary information when you click on the file in the Open dialog.

Import

Select this sub-menu to see the different importing options.



Import sub-menu

Q&E File

Choose this menu command to fill a form with information already typed into a different form. The Wizard will collect all the information needed to complete this process.

Text into Word Processor

Choose this menu command to use a file created in another word processing program. You can import text into any word processing area of *Quick & Easy*. Go to the word processing area which will hold the text before selecting Import Text.

Import ThinkDOCS

Choose this to use information in ThinkDOCS documents to fill out a *Quick & Easy* form. Follow the steps of the wizard to select the *Quick & Easy* form you want to fill with data. Next select the client and case whose information you want to use. Select to import the case or select to include a specific document as well. Information from ThinkDOCS fields that matches fields on the selected *Quick & Easy* form will automatically fill with information.

Page Setup

ALT,F,U

Page Setup is available when you are working on a form that is solely a word processor (for typing up extra information, letters, etc.). Choose Page Setup to select margins for the currently displayed page.

Print

CTRL+P

Select Print (CTRL+P or ALT,F,P) from the File Menu to choose the pages you want to print. You can choose to print All Pages or individual pages of the forms.

Print Setup

ALT,F,R

Choose Print Setup to select a printer to use when printing your forms. If you do not choose Print Setup, *Quick & Easy* will print to your Windows default printer.

Send to FAX

ALT,F,E

Choose Send to FAX to choose pages of the currently displayed form and send them to a receiving FAX machine. Send to FAX will only appear on the File Menu if you have a FAX configured to work in Windows 3.1x or Windows 95. You can manually select your FAX driver by choosing Options from the Tools Menu.

Exit

ALT,F,X

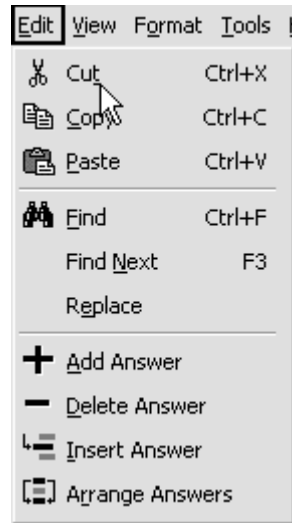
Choose Exit (ALT+F4 or ALT,F,X) from the File menu when you are finished using *Quick & Easy*. If you have made changes to the current form, you will be asked if you want to save the file before exiting. If you answer no, all changes made to the form since the last time it was saved will be lost.

EDIT MENU

Cut

CTRL+X

Highlight a block of text with your mouse or SHIFT + arrow keys, then choose Cut to delete it and place it on the Windows clipboard (a temporary holding place from which it can be pasted later).



Edit Menu in *Quick & Easy*

Copy

CTRL+C

Highlight a block of text with your mouse or SHIFT + arrow keys, then choose Copy to place a copy of the text on the Windows clipboard.

Paste

CTRL+V

Place your cursor at the place you want to insert text, then choose Paste to insert the contents of the clipboard.

Find

ALT,E,F

CTRL+F

Choose Find to quickly move to a specific word or phrase.

Find Next

ALT,E,N

F3

Choose Find Next to quickly move to the next occurrence of a word or phrase.

Replace

ALT,E,E

Choose Replace to find a word or phrase and replace it with a different word or phrase.

The following four menu commands are only available when your cursor is located in a question that allows more than one answer.

Add Answer

ALT,E,A

Choose Add Answer from the Edit menu to add an answer to the currently selected multiple answer question. An answer will be added in the last position, after all other answers to this question.

Delete Answer

ALT,E,D

Choose Delete Answer from the Edit menu to delete the currently selected answer of a multiple answer question.

Insert Answer

ALT,E,I

Choose Insert Answer from the Edit menu to add an answer to the currently selected multiple answer question. Place your cursor inside the answer which should follow the new answer, then select Insert. An answer will be created before the currently selected answer. All subsequent answers will be renumbered accordingly.

For example: If you want to insert an answer into position #3, place your cursor in the answer currently in position #3, then select Insert Answer. The current answer #3 will be moved to answer #4 and you will have a new, blank answer in position #3.

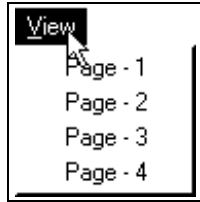
Arrange Answers

ALT,E,R

Choose Arrange Answers from the Edit menu to change the position of answers in a multiple answer question of your form.

VIEW MENU

The View menu allows you to access all pages of your form, however you can also move between pages using the status bar at the bottom of the *Quick & Easy* window.

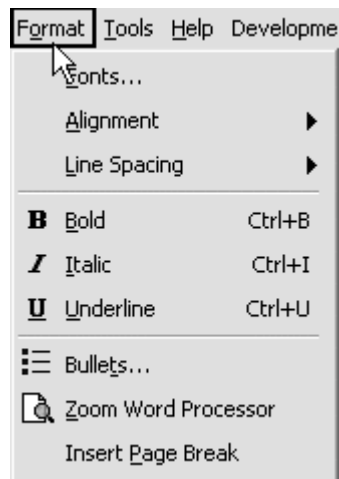


View Menu in *Quick & Easy*

The View menu changes to match the form that is currently open. All pages of the form will be listed here.

FORMAT MENU

The Format Menu of *Quick & Easy* contains commands that allow you to change the appearance of text in your form. Font, Alignment, Line Spacing, Special Effects and Bullets are all controlled from this menu.



Format Menu in *Quick & Easy*

Font

ALT,O,F

Choose Font to change the font of the current field or highlighted text in the word processor. If your cursor is in a field, all text in the field will change to the font, font size and special effects that you select. If your cursor is in a word processing area, all highlighted text will change to the font you specify.

Alignment

ALT,O,A

Choose Left, Right, Centered or Justified Alignment. This menu command is only available when working in a word processing area of *Quick & Easy*.

Left

Left alignment starts all lines of text in the selected paragraph(s) on the left margin.

Centered

Centered alignment centers all lines of text in the selected paragraph(s) between the left and right margin.

Right

Right alignment lines up all text in the selected paragraph(s) on the right margin.

Justified

Justified alignment starts all lines of text in the selected paragraph(s) on the left margin and lines up the last character of each line on the right margin by placing extra space proportionally between each character on the line.

Line Spacing

ALT,O,L

The Line Spacing command found on the View menu, is only available when your cursor is in a word processing area. There are three line spacing choices available -- Single, One and One Half and Double.

Single

Single line spacing does not place any extra space between lines of text.

One and One Half

One and One Half line spacing places one half of a line of extra space between each line of text.

Double

Double line spacing places one line of extra space between each line of text.

Bold

CTRL+B

Choose Bold (CTRL+B) from the Format Menu to make the current field or highlighted text in the word processing area bold.

- If your cursor is in a field, all text in the field will change to bold.
- If your cursor is in a word processing area, all highlighted text will change to bold.
- If the highlighted text or text in the current field is already bold, selecting Bold will change the font back to normal.

Italic

CTRL+I

Choose Italic (CTRL+I) from the Format Menu to make the current field or highlighted text in the word processor italicized.

- If your cursor is in a field, all text in the field will change to italics.
- If your cursor is in a word processing area, all highlighted text will change to italics.
- If the highlighted text or text in the current field is already italicized, selecting Italic will change the font back to normal.

Underline

CTRL+U

Choose Underline (CTRL+U) from the Format Menu to make the current field or highlighted text in the word processing area underlined.

- If your cursor is in a field, all text in the field will be underlined.
- If your cursor is in a word processing area, all highlighted text will be underlined.
- If the highlighted text or text in the current field is already underlined, selecting Underline will change the font back to normal.

Bullets

ALT,O,T

Select Bullets to choose a style of bullet to use. You can choose one

of the five default bullet characters or you can select to use a different bullet by clicking on the Change Bullet button. If you select this menu command when your cursor is in the word processing area, a bullet will be placed in the text when you close the Bullet dialog box.

Zoom Word Processor

ALT,O,Z

Choose this menu command to see more of a word processing answer at one time. This is only available when your cursor is in certain word processing areas.

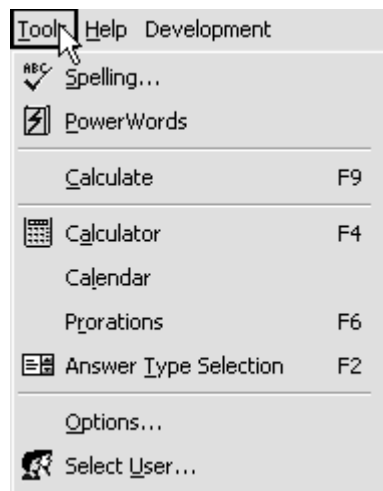
Insert Page Break

ALT,O,P

Choose Insert Page Break to place a manual page break at a certain point in the text of a word processing area. Quick & Easy does automatically continue text on a separate page for you, however you can decide the exact placement of a page break by forcing it into a certain location within your text.

TOOLS MENU

The Tools Menu gives you access to commands which help set program defaults and spell check the data you enter into the forms. Note that not all menu commands appear all the time. The Tools Menu changes depending upon the type of form currently being filled out.



Tools Menu in *Quick & Easy*

Spell Check

ALT,T,S

Choose Spell Check to scan your data for spelling accuracy. You can replace words which are misspelled, add words to a custom dictionary or ignore changes the spell checker suggests.

PowerWords

Select PowerWords to see choices that are buzzwords for employment searching.

Calculate

Select Calculate (F9) from the Tools menu to force all total fields to be recalculated. The correct totals will be placed in appropriate fields. Please note that, particularly on large forms, recalculating all the totals is a lengthy process and may take a few minutes.

Calculator

Select Calculator (F4) from the Tools Menu to use a calculator to add, subtract, multiply or divide numbers. The calculator is only available when your cursor is located in a field that supports it.

Calendar

Select Calendar to select a date.

Proration

Select Proration (F6) from the Tools Menu to calculate a prorated amount for a line. This command is only available when your cursor is located in a field that may require a prorated amount. This menu command is only available when needed.

Answer Type List

Select Answer Type List (F2) from the Tools Menu to bring up the Answer Type List if it is closed. Your cursor must be located in a field that supports the answer type list. Selecting an answer type will increase the accuracy of information transferred from a federal to a state estate tax form. The Answer Type List command is only available when your cursor is located in a field of a schedule that supports answer types. This menu command is only available when needed.

Options

ALT,T,O

Select Options to change program-wide defaults and defaults for the type of form currently displayed. If there are form specific options, there will be a tab in the Options dialog with the current form's name on it. Click the tab to change or view options for this form type. Any changes made will affect all forms of this type.

Some of the general defaults set in this dialog box include:

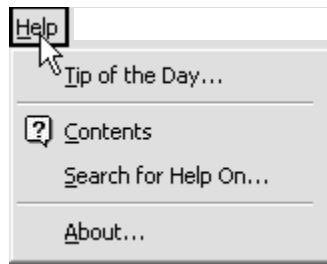
- Automatic File Save
- Backup When Saving
- Show Toolbar Help
- Show Non-printing Characters
- Use System Sounds
- Forms in Color When Available
- Print Forms in Long Page Mode (needed by certain types of printers)
- Print Dithered Areas as Solid (not usually needed)
- Auto-print Date on Form When Available
- No Back Page Printing Prompt
- No automatic duplex printing
- Default Font
- Format of Dates and Currency
- Fax Driver Used
- Color of Hot Spot Text (answers that can be crossed out or circled)

Select User

Select the user whose name will be placed on the current form. (This command is only needed in certain versions of *Quick & Easy*.)

HELP MENU

The Help menu gives you access to *Quick & Easy's* documentation. The About box gives you access to information helpful to technical support representatives when you call DataTech.



Help Menu in *Quick & Easy*

Tip of the Day

Select Tip of the Day to bring up the dialog box you see when you begin using *Quick & Easy*. It contains a series of helpful notes to explain some of *Quick & Easy*'s more unique features.

Contents

Select Contents to see a list of the major help topics.

Search for Help On

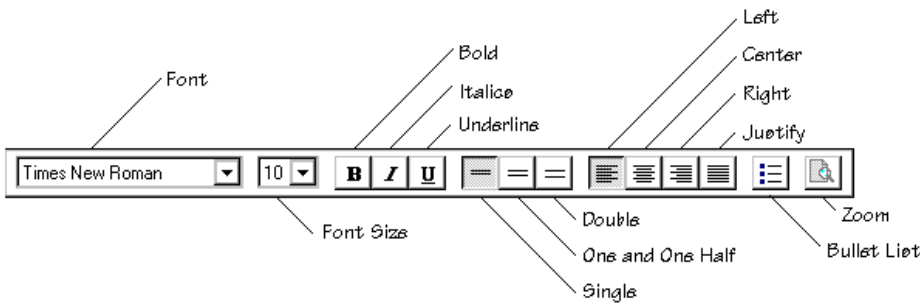
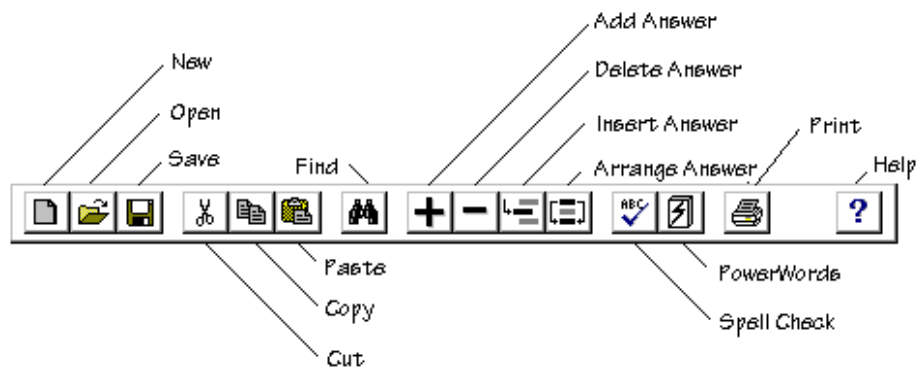
Choose Search for Help On to move directly to the keyword search feature of the help system. You can also access the index by choosing the Search command button from inside the help window.

About

The About box contains information about *Quick & Easy*. You can access the version number and copyright information as well as see information about your system resource availability.

TOOLBAR

The toolbars give you quick access to some of the most commonly used menu commands in *Quick & Easy*. Click on one of the icons or drop-down lists with your mouse for a shortcut.



Toolbars in *Quick & Easy*

Keyboard

The keys used to enter and edit information are as follows:

ALT+F4	Exit
BACKSPACE	Moves the cursor to the left and erases.
CTRL+1	Single line spacing
CTRL+2	Double line spacing
CTRL+5	One and one half line spacing
CTRL+A	Save as
CTRL+B	Bold
CTRL+C	Copy
CTRL+E	Centered alignment
CTRL+END	Moves the cursor to the end of the text in that answer.
CTRL+F	Find
CTRL+HOME	Moves the cursor to beginning of text in that answer.
CTRL+I	Italic
CTRL+J	Justified alignment
CTRL+L	Left alignment
CTRL+LEFT ARROW	Moves the cursor left one word.
CTRL+N	New
CTRL+O	Open
CTRL+P	Print
CTRL+R	Right alignment
CTRL+RIGHT ARROW	Moves the cursor right one word.
CTRL+S	Save
CTRL+U	Underline
CTRL+V	Paste
CTRL+X	Cut
DEL	Deletes the character above the cursor.
END	Moves the cursor to the end of the current line.
F3	Find next

F7	Move backward out of word processing area to next field.
F8	Move forward out of word processing area to next field.
HOME	Moves the cursor to the beginning of the current line.
RIGHT/LEFT ARROW	Moves the cursor within the field.
SHIFT+ARROW KEYS	Highlights (selects) the text.
SHIFT+TAB	Moves you to the previous field.
SPACEBAR	Toggles between X and space in check boxes and executes the action of command buttons.
TAB	Moves you to the next field.

Using the *Quick & Easy* Window

EXPLANATION OF SCREENS

Quick & Easy shows each page of the form on a different screen. All of the screens can be accessed from the View Menu or the pop-up menu on the status bar. Each screen contains fields or word processing areas in which data is entered.

FIELDS

Quick & Easy contains many different types of fields. Some examples are check boxes, text fields, word processing areas and drop-down list boxes. Depending upon the type of field, you will type in or mark an answer.

⇒ To move between fields:

- Click with the mouse where you wish to move.
- Use the TAB key to move from one field to the next.
- Use SHIFT+TAB to move backward from one field to the previous.
- To move quickly to a particular command button, press ALT+ the access key (underlined letter) of the button or click on it with your mouse.

Data Entry Fields

Many of the fields in *Quick & Easy* require you to type in an answer. In these fields, there is a limit on how much space you have available. You cannot type in more than you can see on the screen. If you are having trouble fitting an answer into a field, try to abbreviate it. As you change fonts and point sizes, you will notice that more or less characters fit into each field. *Quick & Easy* only allows you to type in the number of characters which will fit onto the printed form.

EMPLOYEE		EMPLOYER	
First Name		Name	
Last Name		Address	
Address		City/Town	State Zip
City/Town	State Zip	Country	
Country		Telephone	FBN
Telephone			
INJURY INFORMATION		INSURER or THIRD PARTY ADMINISTRATOR (if self insured)	
Body Part(s) affected		Name	
Type of Injury		Address	
Description of Injury		City/Town	State Zip
		Telephone	Bureau Code
		Country	
Check if Occupational Disease	<input type="checkbox"/>	Claim #	FBN

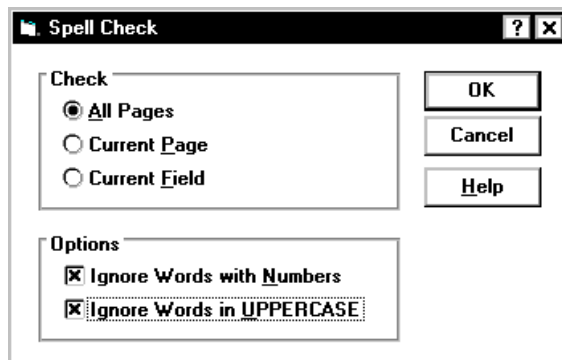
Type data directly into the fields of the form.

Sometimes you may not be able to type into the entire field which appears on the screen, however this is the number of characters which will fit into the allocated space on the printed form, so *Quick & Easy* stops you from typing extra characters.

If you type a large amount of text in a small point size and then increase the point size of the text, some of the last characters in the field may be outside of the designated space on the form when you print it. In this case, you will have to decrease the point size or abbreviate in order to see the entire answer in the right spot on the printed form.

Dialog Boxes

From some dialog boxes you cannot access the menus or anything else outside the box. These generally have only OK and Cancel command buttons. OK allows you to save whatever information you have entered and close the dialog box. Choose Cancel or press ESC to close the dialog box without saving any changes.



Most dialog boxes have OK and Cancel buttons.

Word Processing Areas

Some questions require more explanation than would fit into a small field. These areas of *Quick & Easy* have word processing capabilities to make them easy to use and to allow you to use available features

to format your text so that it will stand out or be more easily understood.

Drop-down List Box

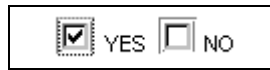
Fields that have a down arrow in a box to their right will display a list of options from which you can choose. An example of a drop-down list box is the font drop-down list on the toolbar. This drop-down list contains the names of all fonts available to *Quick & Easy*.

⇒ To use a drop-down list box:

1. Click on the arrow to the right of the field with your mouse, or press ALT+ the up or down arrow to display the list.
2. Use your up and down arrow keys or your mouse to select an item from the list. You can also press the first letter of the item you are looking for to move to the first item on the list beginning with that letter.
3. Press TAB or click on another field with your mouse to save your selection.

Check Boxes

A check box is like a yes or no question, or a switch to turn an option on or off. You may mark it or leave it blank depending upon if you want the option to be active or not. In these questions, you mark either Yes or No.



Click or press SPACEBAR to mark the check box.

⇒ To mark or un-mark a check box:

1. Click on the field with your mouse or TAB to the proper field and press SPACEBAR to check the field.
2. Press SPACEBAR or click with the mouse again to uncheck the field.

Please note that you cannot type the letter X in the box. You must use either the mouse or press SPACEBAR to select a check box. You can also press ALT+ the access key (underlined letter) of a check box to select it.

FIELDS THAT AREN'T ACCESSIBLE

At certain times you might not be able to select certain fields. If you

try to select something which is unavailable, you will not be able to activate the field and you may hear a beep.

If an option or menu command is unavailable, the text will appear gray instead of black. You should be able to tell the difference between an accessible and an inaccessible option even on a monochrome monitor.

Not all options will be available all the time. Some items, when selected, affect other program options. For example, the Alignment menu command on the Format menu is only available when you are in a word processing area. While on any other field, it is grayed out (unavailable).

In a multiple answer question (a question that allows more than one answer), answers after answer #1 are grayed out (unavailable) until you click the Add icon on the toolbar to create another answer. You have to click the Add icon each time you want a new answer. The Add icon is only available if your cursor is in a field of an answer to the question to which you want to add another answer.

COMMAND BUTTONS

Some command buttons are located at the bottom or side of dialog boxes. They perform certain standard functions.



Click on a button or press ENTER to activate it.

⇒ **To activate a command button:**

Press ALT+ the access key for that button (for example ALT+R for Replace All).

-OR-

TAB to the button and press ENTER.

-OR-

Click on the button with your mouse.

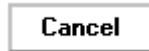
If you press ENTER, when a command button is highlighted, the function of the command button will be executed.

Sometimes certain command buttons aren't accessible (appear in gray). This means that the command button is not available at that particular time.

Some of the more common command buttons found on *Quick & Easy* screens are:

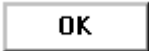
Cancel

Choose the Cancel button or press ESC to abandon any changes or additions you have made in a dialog box.



OK

The OK command button should be selected when you have finished entering or changing information in a dialog box. This causes the changes or additions to be saved and closes the dialog box.



USING THE MENUS

Quick & Easy is operated through "menus," or lists of commands that allow you easy access to the different functions of *Quick & Easy*.

⇒ To use the menus with a keyboard:

1. Press ALT to access the menu bar.
2. Press the access key (underlined letter) of a title on the menu bar to access that menu, or use your right and left arrow keys to move from title to title. Example, press ALT+F to open the File Menu.
3. Press the access key of a particular menu command to select it.

-OR-

Use the up and down arrow keys to move between menu commands and press ENTER to select the one you want.

⇒ To use the menus with a mouse:

1. Point to a menu title on the menu bar and click on the left mouse button. This will drop down the menu, showing you all the available commands.
2. Point to the menu command you want to execute, then click on the left mouse button.

It is important to note that there are times when you are not able to access the menus or other screens. Typically messages or dialog boxes require that you choose OK or Cancel to close the box before you can do anything else.

Menu commands or screen options which are not available will appear gray (disabled).

Technical Reference

If the problem you are experiencing is not listed in this section, check the READ ME file or Help for the latest information.

MAKING BACKUPS

Backups are strictly for archival purposes. You cannot install from or uninstall to backup disks.

PRINTING THE FORMS

Print True Type as Graphics

Whenever using a laser printer, or other printer that has the option to use True Type as Graphics, you must turn this option on (Print Setup). If you do not, some forms may not print correctly.

FONTS

You may notice that all fonts available to other Windows applications may not be available in the fields of *Quick & Easy*. Due to the nature of the forms (fields limited by a definite space), only those fonts for both printer and screen will be available in the fields.

SPELL CHECKER

A user dictionary is created when you first select to add a word.

⇒ **To delete the entire contents of the user dictionary:**

1. Delete the file USER.DIC from *Quick & Easy*'s folder.

⇒ **To edit the dictionary:**

1. Open the file USER.DIC using Windows Notepad or DOS Edit.
2. Delete or add words, making sure to use the same format which is used for words already in the dictionary.
 - alphabetical
 - one word per line
3. Save the dictionary using the same file name — USER.DIC.

WARNING: Do not attempt to edit the dictionary unless you are comfortable editing text files with a text editor. If the user dictionary becomes damaged, it will be deleted automatically.

AUTOMATIC FILE SAVE

Quick & Easy allows you to automatically save your file as you are working on it. The information is saved to a file named autosave.sav in the folder where *Quick & Easy* is installed. Automatic file save is not intended as a way for you to permanently store the information you type since it is overwritten every few minutes you use *Quick & Easy*. This option is a safety measure to help you recover information in case of power loss or other accident where you lose your permanent file. If you lose your permanent file, start *Quick & Easy* and select "Open an existing form." Type autosave.sav in the File Name box.

After the file opens, make sure to choose Save As and rename the file so that you don't lose the information the next time automatic file save turns on.

⇒ To retrieve an automatically saved file:

1. Choose Open (CTRL+O) from the File Menu or if the Startup dialog box is displayed, choose "Open an existing form.
2. Type autosave.sav into the File Name field and press ENTER.

Strategies for Filling out the Forms

STRATEGY FOR FILLING OUT THE FORM

⇒ How to change the date format.

1. Choose Options from the Tools menu.
2. Click on the Format tab.
3. If the "Use SHORT DATE system setting for date format" check box is selected, click the check box to un-select it.
4. Select a date format from the list that has a 4 digit year. Either M/D/YYYY or MM/DD/YYYY would fit best in the fields of the form.

Fields That Are Grayed Out or Disabled

Total fields, fields that are calculated automatically, appear the same color as the background and can't be edited. You can turn off calculations on the Options screen if you need to edit total fields. You can also right click on any total field to select "Allow Editing." This will allow you to edit that total field.

Some fields need to be turned on with a check box in order to type into them. Click the check box beside the field to turn on the field. If it is a total field, the calculated amount will display in the box. If it is not a calculated field, you can type into the box.

On forms with schedules, all fields are disabled except those of the first item on each schedule. Place your cursor in one of the fields of the first item on the schedules, then click the Add an Answer icon on the toolbar to enable the next item in the list. Do this each time you want to add another item to the schedule.

CALCULATIONS

Many calculations on the forms can be done automatically, saving you time and preventing costly errors. Calculations can be done by formulas already set up on the form. However, if you prefer, you can type your own results into each field.

For other areas where a number needs to be entered, there is a calculator provided to make simple addition, subtraction, multiplication or division convenient. The total calculated will be placed on the form for you.

Total Fields

Total fields are set to automatically calculate as the default. This means that on screen when you first begin using *Quick & Easy*, the total fields will be the same color as the background of the form and you will not be able to type in them or change any information they contain. You can turn off calculations in any total field by right clicking on it and selecting "Allow Editing." You can select Allow Editing again and remove the check mark to turn automatic calculations back on.

Calculation Options

There are several options you can set that affect the way the amounts are totaled. Select Options from the Tools menu and click on the Other tab to see Calculation Options.

Automatic calculations can be turned off, allowing you to directly type into all total fields. To turn off automatic calculations, select "Allow Editing of Total Fields." All information in total fields will be lost and overwritten if automatic calculations are turned back on later.

Turn automatic calculations on by selecting the option "Do not allow editing of total fields." When automatic calculations are turned on, you can select for totals to update automatically as you type. This will recalculate totals each time you make a change to a field that is part of a calculation. You can turn off this option to save time, if necessary. Just remember to Recalculate (F9) before printing or saving.

Notes:

F9 recalculates all totals on the form if you have turned off automatic recalculation as you edit (Options screen). You can turn off calculations in any total field by right clicking on it and selecting "Allow Editing." You can select Allow Editing again and remove the check mark to turn automatic calculations back on.

You can select to have the form recalculate each time you open it. This is not normally necessary and will take extra time when opening a form, however it will make sure that all calculations are completely updated each time you open the form.

ANSWER TYPE LIST

The Answer Type List appears under the two toolbars when you click your cursor in a field of a schedule that supports it. Only the US Estate Tax Return – 706 – and the PA Inheritance Inventory form have an answer type list. Selecting an answer type narrows down the type of item it is. For example, on Schedule B Stocks and Bonds, the answer type list allows you to specify which items are stocks, which are bonds and which are closely held entities. When the items on Schedule B are converted to a state return, each group of items (Stocks, Bonds, Closely held entities) could go to a different place on the state form.

⇒ To select an answer type:

1. Place your cursor in any field on a schedule that supports answer types. The answer type list will appear under the two toolbars.
2. Click the arrow to the right of the list to display its contents.
3. Click on the answer type for the item where your cursor was located before you selected the list.
4. Click on another item on the schedule and repeat the above steps to set its answer type.

Notes:

Once you select an answer type, it will be saved with the file. As you move your cursor between items on the schedule you will see the list update to show you which answer type is selected for that item.

When you select to add an answer (Edit menu or the "+" sign on the toolbar) the new answer will have the same answer type as the one where your cursor was located when you selected to add an answer.

Enter all items of one type, then enter all items of the next type. This will not only make the schedule more organized, but it will also save you time by only requiring that you select an answer type when you enter the first item of each type.

⇒ To redisplay the list if you close it:

1. Place your cursor in a field on a schedule that supports the Answer Type List.
2. You can display the list in one of three ways. Press F2, select Answer Type List from the Tools Menu or right click on the field and select Answer Type List from the pop-up menu.

Note

If Answer Type List is not available on the Tools menu, your cursor is not currently located in a field that is part of a schedule needing the Answer Type List. After converting a form, please check all information before submitting it in order to ensure that all data transferred properly from one type of form to the other.

⇒ **To use data entered in one type of form to create another type of form.**

1. Select Import on the File Menu.
2. Select Q&E Files on the Import sub-menu.
3. Select the Browse button in the Wizard.
4. Choose the file that contains the information you want to use to fill the new form. Click OK.
5. Press the Next button.
6. If the form you want to fill is displayed in the background, choose to load the selected form into the current file and skip the next step. Otherwise choose to select a form or template. Press Next.
7. If you chose to select a template, click the Select Template button and choose the form to fill with data. Press OK, then Next.
8. Click Next to import all related information. You can turn off certain types of information if you want to limit what is imported.
9. Click Next. Click Finish to begin importing.

Notes:

Only information that is the same on both forms will be imported.

This is the best way to transfer information from one type of form to another.

If you import information into the form in the background of your screen, data already filled out in that form will be overwritten by information in the form you import.

Totals will be calculated and placed in the appropriate fields automatically if you have selected the option "Calculate totals as I type." Otherwise you will have to press F9 to recalculate the form. If you have decided to type in the totals manually, you will be able to do so.

Check each page carefully since some information required on one form may not be included on the other.

Note:

There are more fields you will probably need to fill in before submitting your form. After converting a form, please check all information before submitting it in order to ensure that all data transferred properly from one type of form to the other.

Tips

- ⇒ If you own a state estate tax forms package, fill out a 706 first, and then convert the information to a state estate tax form.

About dates

- ⇒ All date fields require a valid date to be entered before you can tab to another field.
- ⇒ Use a four digit year when typing in dates. This requires setting the date format (Options screen) to have a four digit year.

About answer types

- ⇒ Use the answer type list available on some schedules of the 706 to clarify further what type of item it is. This will facilitate transfer of each item to the correct place on the state estate tax form.

About currency

- ⇒ Certain fields accept currency amounts only.
- ⇒ If characters other than numbers, commas and periods are entered in currency fields, the totals may not be correct.
- ⇒ You can force a dollar sign to appear or to not appear in currency fields by selecting or un-selecting the "Include (\$) currency symbol" check box. (On the Options screen (Tools menu), click the Format tab.)
- ⇒ Some currency fields will have no formatting (dollar signs, commas or periods), particularly on page 1 and recapitulation sections of some forms so that all information is uniform and properly aligned.

About calculations

- ⇒ A calculator is available in most number fields by pressing F4.
- ⇒ Some fields are automatically filled when you type information into other areas of the form. These fields can't be edited. They will change when you edit their corresponding fields elsewhere on the form.
- ⇒ Total fields will calculate automatically for you. You cannot type in these fields or edit the amounts in them when calculations are turned on. You can turn off automatic calculations on the Other tab of the Options screen (Tools menu).
- ⇒ You can turn off a calculation in any field if necessary. To do so, right click on the calculation field you want to edit and select the menu command "Allow Editing." You will see a check mark appear beside the menu command. You can reset the field to automatically calculate by

right clicking on the field again and selecting "Allow Editing" to remove the check mark.

FEDERAL ESTATE TAX FORMS

If you need to file a federal estate tax return as well as a state estate tax return we suggest you fill out the Federal Estate Tax Form (706) first. ***You will eliminate hours of typing duplicate information by using 706 Federal Estate information to fill out the state estate tax forms. (Individual state packages sold separately.)***

Before typing information it might be helpful to make a few changes. The following instructions will assume you are filling out the 706 US Estate Tax Return, however the same instructions apply to any form you fill out with *Quick & Easy*.

Always fill out the 706 before your state estate tax form (state estate tax package sold separately) in order to eliminate retyping the same information twice.

We suggest you type 4 digits for the year so that the whole year is saved with your file. After you type a valid date and move to another field, the date field will automatically change to match the date format default selected on the Options screen.

You can open a 709 with information you typed into a 706. Some general information at the top of Form 709 will be filled in with the decedent's information. The real power of this feature, however, is converting from the 706 to the state estate tax form (state forms sold separately).

HUD-1 FORMS

Before typing information it might be helpful to make a few changes. The following instructions will assume you are filling out the HUD-1 Settlement Sheet; however the same instructions apply to any form you fill out with *Quick & Easy*.

⇒ Change the default font

1. Select Options from the Tools menu.
2. Click on the Default Font tab.
3. Choose Arial Narrow size 8 or Arial size 8 or another font that is compact but easy to read.
4. Choose the Apply to Fields button.

Note: You can choose any font you wish, however an 8 point

font is best on the HUD-1 Settlement Sheet since more information will fit in each field. This is especially important if you have amounts that are paid outside closing and need to print to the left of the amount column.

We suggest you type 4 digits for the year so that the whole year is saved with your file. After you type a valid date and move to another field, the date field will automatically change to match the date format default selected on the Options screen.

Prorations

Prorations are necessary for some financial calculations where you know how much something costs in a given time period, but want to calculate the cost for a different time period. Only certain fields support prorations. Lines 106-112 and 210-219 on page 1 of the HUD-1 support prorated amounts.

Place your cursor in a field where a proration is supported. Select Proration from the Tools menu, press F6 or right click the field and select Proration from the pop-up menu to use the Proration dialog box.

Explanation of Proration dialog box

Prorate from Beginning of Period

Select this option to calculate the Prorated Amount from the "FROM" date until the Proration Date (1/1/2002 - 4/17/2002).

Prorate until End of Period

Select this option to calculate the Prorated Amount from the Proration Date to the "TO" date (4/17/2002 - 12/31/2002). This option was used to calculate the Prorated Amount in this example.

From Date

Type in the beginning date that was used to determine the amount in Base Amount. In other words, this date is the beginning date that sets the time period covered by the amount entered in Base Amount (from 1/1/2002 to 12/31/2002 it costs \$1000).

To Date

Type in the ending date that was used to determine the amount in Base Amount. In other words, this date is the ending date that sets the time period covered by the amount entered in Base Amount (from 1/1/2002 to 12/31/2002 it costs \$1000).

Base Amount

Type in the amount for the period of time between the FROM date

and the TO date. In this example it costs \$1000.00 from 1/1/2002 until 12/31/2002.

Proration Date

Type in the date to use to calculate the Prorated Amount. If you want to use the Settlement Date to calculate the Prorated Amount, do not type the date here, select the check box "Set proration date to settlement date."

Proration

Prorate from beginning of period Prorate until end of period

From: To:

Base Amount Set proration date to settlement date

Proration Date Include proration date in calculation

Prorated Amount Paid outside closing

Field Notes:

Update Form
Calculate
Cancel

This is the Proration dialog box.

Prorated Amount

This will be calculated for you. If you had turned off prorations for this line at some point, the number may be in a red background. Click the Calculate button to recalculate the Prorated Amount.

Use Settlement Date

Select the check box "Set proration date to settlement date" when you always want to use the Settlement Date to calculate the Prorated Amount. This allows any proration set this way to be automatically recalculated whenever the Settlement Date changes. Settlement Date is a field on the form. Whenever it is edited, all prorations and calculations based on it will be recalculated automatically.

Include Proration Date

Select the check box "Include proration date in calculation" when you want the Proration Date to be included in the Proration Amount. If you do not select this check box, the calculation will be made with

one less day. In this example, April 17th was included in the calculation of the Prorated Amount.

Paid Outside Closing

Select the check box "Paid outside closing" to mark the Prorated Amount not to be included in the overall totals on the form. If the amount is marked Paid outside closing, the Prorated Amount will be placed to the left of the main amount column on the form and the initials p.o.c. will be placed with the amount. The Prorated Amount will not be included in the overall totals of the form.

Field Notes

Type any special comments or reminders in this field. They will be saved with the other proration information, but not printed on the form.

Update Form

Select this command button to place the Prorated Amount on the form. It will be placed in the main amount column for the current line unless you select the Paid outside closing check box.

Calculate Button

The Calculate button is only available to be selected when there is something to calculate. You can type in the fields of the form directly. If you do so and turn on the proration calculation, when you open the Proration dialog box, the Prorated Amount will be shown on a red background indicating it is not necessarily calculated. Click the Calculate button to recalculate the Prorated Amount.

Cancel

Choose Cancel when you want to close the Proration dialog box without updating the form. Any changes you made in this dialog box will be lost.

⇒ **To calculate a proration:**

1. Place your cursor in a field that supports prorations.
2. Press F6 to bring up the Proration dialog box.
3. Type in the beginning and ending dates (From and To) of the Base Amount.
4. Type in the Base Amount of the cost for the time period typed into From and To.
5. Type the Proration Date you want to use to calculate the Prorated Amount.

6. Option buttons at the top allow you to select if you want the Proration Date to be used as the end or beginning of the period for calculating the Prorated Amount. There are other options that can be set to affect the results. (See below for more information on proration options.)
7. Press Update Form to place the Prorated Amount in the field of the form from which you brought up the Prorations dialog.

If you try to type directly in the column for the amount or the amount paid outside closing, you may be asked if you want to turn off prorations for this line. If you answer yes, you can type whatever amount you wish. You can bring up the Proration dialog later to recalculate the Prorated Amount.

Proration options

The Proration dialog box has several options that affect the way the Prorated Amount is calculated. At the very top there are two option buttons that allow you to select if you want to prorate from the beginning or until the end of the period. This tells *Quick & Easy* whether to use the Proration Date as the ending date or the beginning date in the calculations.

You can select to use the Settlement Date as the Proration Date. If you select this option, the prorations will automatically recalculate whenever the Settlement Date is changed.

You can include the Proration Date in the calculations. If you do not select the option, the Proration Date will not be used to calculate the Prorated Amount.

You can mark the proration as Paid Outside of Closing. This will tell *Quick & Easy* to place the Prorated Amount with the initials "p.o.c." beside it to the left of the column of amounts. The amount will not be included in the totals on the form.

HUD Tips

- ⇒ When you change the Settlement date, interest calculations on line 901 and any prorated amounts using the Settlement Date as the Proration Date are automatically recalculated (if automatic calculations are turned on and the check box Set Proration Date to Settlement Date is selected in the Proration dialog).

About interest

- ⇒ Line 901 of the HUD 1 calculates interest for the specified time period. Both the first and last day typed onto this line are included in the calculations. Therefore, change the dates typed on this line to change the days included in the interest calculation.

About currency

- ⇒The column for amounts accepts currency amounts only.
- ⇒If characters other than numbers, commas and periods are entered in this column, the totals may not be correct.
- ⇒The field just to the left of the amount column is designed to hold any p.o.c. amounts (paid outside closing).
- ⇒You can force a dollar sign to appear or to not appear in each currency field by selecting or un-selecting the "Include (\$) currency symbol" check box. (On the Options screen (Tools menu), click the Format tab.)

About calculations

- ⇒A calculator is available in most number fields by pressing F4.
- ⇒A proration calculator is available by pressing F6 from any field on a line where a proration may be needed.
- ⇒Some fields on the right half of the page are automatically filled when you type information on the left half of the form. These fields can't be edited. They will change when you edit their corresponding fields on the left.
- ⇒Total fields will calculate automatically for you. You cannot type in these fields or edit the amounts in them when calculations are turned on. You can turn off automatic calculations on the Other tab of the Options screen (Tools menu).

IL FORM 700

You can open an IL Estate Tax form with information you typed into a Federal 706. First you need to open an IL Form 700 and fill it with your Federal 706 information.

INDIANA INHERITANCE TAX FORMS

Always fill out the Federal Estate Tax form first, then convert the data to an Indiana Inheritance Tax form (IH-6 or IH-12).

NEW JERSEY INHERITANCE TAX FORMS

Always fill out the Federal Estate Tax form first, then convert the data to a New Jersey Inheritance Tax form.

NY ESTATE TAX FORMS

You will eliminate hours of typing duplicate information by using 706 Federal Estate information to fill out the NY ET-90.

You can open any NY Estate Tax form with information you typed into a Federal 706, however it is best to start by converting information from the Federal 706 to the ET-90 without schedules.

PA INHERITANCE TAX FORMS

You will eliminate hours of typing duplicate information by using 706 Federal Estate information to fill out the PA Rev-1500. You can open a PA Rev 1500 with information you typed into a Federal 706. Use the Answer Type List in the 706 to direct how items on certain schedules will transfer to the PA Rev 1500. For information on using the Answer Type List, see the documentation earlier in this section.

Note: After converting a form, please check all information before submitting it in order to ensure that all data transferred properly from one type of form to the other.

You can convert a PA Rev 1500 to a PA Inventory form. All items from Schedules A,B,C,D and E of the PA Rev-1500 will be converted to the inventory form.

You can also convert the PA Inventory form to the Rev 1500. We suggest you do this only when a Federal 706 is not required, however, because information passes from the 706 to the 1500, but not from the Rev 1500 to the Federal 706. See special instructions later in this chapter.

What Will Convert

Federal 706	Federal 706 Answer Type	PA Rev 1500
Decedent's info	-----	Decedent's info
Surviving Spouse Info	-----	Surviving Spouse Info
Pg2 Representative Info	-----	Pg1 Correspondent info
Preparer other than Rep	-----	Preparer other than Rep
Pg2 Beneficiaries >\$5000	-----	Sch J Beneficiaries
Sch A Real Estate	-----	Sch A Real Estate
Sch B Stocks and Bonds	Stock	Sch B Stocks and Bonds
Sch B Stocks and Bonds	Bond	Sch B Stocks and Bonds
Sch B Stocks and Bonds	Closely Held Entity	Sch C Closely Held Corp, P or Sole-P
Sch C Mortgages, Notes and Cash	Mortgage	Sch D Mortgages and Notes
Sch C Mortgages, Notes and Cash	Promissory Note	Sch D Mortgages and Notes
Sch C Mortgages, Notes and Cash	Cash in Possession	Sch E Cash, Bank Dep and Pers Prop
Sch C Mortgages, Notes and Cash	Cash in Financial Org	Sch E Cash, Bank Dep and Pers Prop
Sch E Jointly Owned Property Pt 2	-----	Sch F Jointly Owned Property
Sch F Other Misc Property	Debts due Decedent	Sch E Cash, Bank Dep and Pers Prop
Sch F Other Misc Property	Interest in business	Sch E Cash, Bank Dep and Pers Prop
Sch F Other Misc Property	Insurance on another	Sch E Cash, Bank Dep and Pers Prop
Sch F Other Misc Property	Rights	Sch E Cash, Bank Dep and Pers Prop
Sch F Other Misc Property	Royalties	Sch E Cash, Bank Dep and Pers Prop
Sch F Other Misc Property	Leaseholds	Sch E Cash, Bank Dep and Pers Prop
Sch F Other Misc Property	Judgments	Sch E Cash, Bank Dep and Pers Prop
Sch F Other Misc Property	Reversionary Interest	Sch E Cash, Bank Dep and Pers Prop
Sch F Other Misc Property	Shares in trust funds	Sch E Cash, Bank Dep and Pers Prop

Sch F Other Misc Property	Household goods	Sch E Cash, Bank Dep and Pers Prop
Sch F Other Misc Property	Farm products	Sch E Cash, Bank Dep and Pers Prop
Sch F Other Misc Property	Livestock	Sch E Cash, Bank Dep and Pers Prop
Sch F Other Misc Property	Farm Machinery	Sch E Cash, Bank Dep and Pers Prop
Sch F Other Misc Property	Automobiles	Sch E Cash, Bank Dep and Pers Prop
Sch F Other Misc Property	Partnership	Sch C Closely Held Corp, P or Sole-P
Sch F Other Misc Property	Sole-Proprietors hip	Sch C Closely Held Corp, P or Sole-P
Sch F Other Misc Property	IRA	Sch G Inter-vivos Transfers
Sch G Transfers during life	-----	Sch G Inter-vivos Transfers
Sch J Funeral Expenses	-----	Sch H Funeral Expenses
Sch K Debts, Mort, Liens	-----	Sch I Debts, Mort, Liens
Sch O Charitable, Public Gifts	-----	Sch J Pt IIB Char and Gov Distrib
Sch I Annuities	-----	Sch G Inter-vivos Transfers

Notes:

If you need to fill out a Federal 706, we suggest you fill out the 706 first because information from the Inventory and Rev-1500 forms does not transfer optimally to the Federal 706.

There are more fields you will probably need to fill in before submitting your PA Rev 1500.

After converting a form, please check all information before submitting it in order to ensure that all data transferred properly from one type of form to the other.

CONVERTING A PA INVENTORY FORM TO A PA REV-1500

If you do not need to file a Federal 706, and you prefer to fill out the Inventory form before the Rev-1500, you can do so. Type up the inventory list and select what type each item is from the answer type list on the toolbar. After the Inventory form is finished, save it. Select Import Q&E Files on the File Menu and follow the prompts to select the Inventory form you just filled out. Tell it to fill out a PA Inheritance Tax form (Rev-1500). After the Rev-1500 is created, enter the rest of the information required before you submit.

Answer Type List Used on the Inventory Form

The Answer Type List appears under the two *Quick & Easy* toolbars whenever you click your cursor in a field of a schedule that supports it. Only the US Estate Tax Return (706) and the PA Inventory form have an answer type list. Selecting an answer type for each item on the inventory form lets *Quick & Easy* know what schedule each item belongs to on the Rev-1500. For example, if you select Real Estate as the answer type, when the Inventory form is imported to a Rev-1500, that item will be placed on Schedule A.

⇒ To select an answer type:

1. Place your cursor in any field on a schedule that supports answer types. The answer type list will appear under the two toolbars.
2. Click the arrow to the right of the list to display its contents.
3. Click on the answer type for the item where your cursor was located before you selected the list.
4. Click on another item on the schedule and repeat the above steps to set its answer type.

Notes:

Once you select an answer type, it will be saved with the file. As you move your cursor between items on the inventory form you will see the list update to show you which answer type is selected for that item.

When you select to add an answer (Edit menu or the "+" sign on the toolbar) the new answer will have the same answer type as the one where your cursor was located when you selected to add an answer.

Enter all items of one type, then enter all items of the next type. This will not only make the inventory more organized, but it will also save you time by only requiring that you select an answer type when you enter the first item of each type.

Tips

- ⇒ After converting from a Federal 706, click on the Decedent's date of birth and date of death (on the PA Rev-1500) so that the dates format properly to fit in the boxes of the PA Rev-1500.
- ⇒ Some currency fields will have no formatting (dollar signs, commas or periods), particularly on page 1 and recapitulation sections so all information is uniform and properly aligned.

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