

FlexDraft[®]

Estate Planning Document Assembly System

Getting Started Manual

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FlexDraft® Getting Started Manual¹

1. Introduction

1.01 This is a Getting-Started Manual, not a Reference Tool

This is the user's manual for *FlexDraft*, the estate planning system. Its singular purpose is to get you up and running with *FlexDraft*, and to answer some of the questions that might arise while you are getting started with *FlexDraft*.

This manual is not a reference tool; it does *not* teach you everything you need to know about *FlexDraft*. To really learn *FlexDraft*, you just sit down and use it. This manual and the *FlexDraft* Tutorial should get you to the point that you *can* sit down and use *FlexDraft* and, once that happens, you should not need this manual again.

1.02 In a Hurry? Try the Quick Start Installation Guide

This manual contains a lot of detailed step-by-step instructions. If that's what you like, this manual is for you.

The *Quick Start Installation Guide* is a 1-page summary of the bare essentials necessary to get *FlexDraft* up and running on your computer. If you're computer savvy, if you'd rather experiment than read, or if you're just in a hurry, try the *Quick Start Guide*. You can always return to this manual if the *Quick Start Guide* doesn't answer your questions.

1.03 Additional Resources

The following additional resources are designed to help you get the most out of *FlexDraft*. All are saved in <C:\FlexDrft\Document\Resource> on your computer when you install *FlexDraft*. (This assumes that you have installed *FlexDraft* in a single user configuration in the default installation directory. If this is not the case, the locations of the resources on your computer will be inaccurate. If you installed a network version of *FlexDraft*, see part 1.04, "Network Installations—Special Note," at page 5 of this manual.) In any event, shortcuts to (A) and (B) below (and to this manual) are placed on your desktop and in the *FlexDraft* program group. (To get to the *FlexDraft* program group, click the **Start** button, select **All Programs**, then select **FlexDraft**.)

(A) Quick Start Installation Guide

Located: In the Members Area of www.FlexDraft.com (password required for access)
On your PC as: <C:\FlexDrft\Document\Resource\Flexdraft Quick Start Guide.pdf>

As noted above, the *Quick Start Installation Guide* is a 1-page summary of the bare essentials necessary to get *FlexDraft* up and running on your computer.

¹ This manual has been updated for the 2012 release. Most of the screen shots are taken from the 2011 release; however, where the changes are substantial the screen shots have been updated.

(B) FlexDraft Tutorial

Located: In the Members Area of www.FlexDraft.com (password required for access)
On your PC as: <C:\FlexDrft\Document\Resource\FlexDraft Tutorial.pdf>

The *FlexDraft* Tutorial walks you through the preparation of a Will and ancillary documents from beginning to end. When you're done, you should be sufficiently comfortable with *FlexDraft* to start using it as it was intended: To prepare quality, customized estate planning documents for your clients, I strongly recommend that you take the *FlexDraft* Tutorial before you begin preparing actual client documents. But you should complete the steps in this manual (or the *Quick Start Guide*) before you start the Tutorial.

(C) BEPS—"Basic Estate Plan Summary"

Located: On your PC as:
<C:\FlexDrft\Document\Resource\BEPS.wpd>
<C:\FlexDrft\Document\Resource\BEPS.doc>

The BEPS ("Basic Estate Plan Summary") is a summary of the input needed by *FlexDraft* to prepare a basic estate plan (Wills and ancillary documents) in the order asked for by *FlexDraft*. Use it during the initial client meeting both (i) as a check list, to be sure you cover all the issues, and (ii) as your drafting instructions to the person who will actually use *FlexDraft* to prepare the documents -- your secretary, legal assistant and/or associate, or yourself. The BEPS includes detailed footnotes indicating my own drafting preferences and default answers for each field and the circumstances in which those defaults change. I expect that you will revise the BEPS to reflect your personal drafting preferences. This is why it's provided in WordPerfect & Word format.

However, the BEPS won't be a useful or even meaningful tool until you've become pretty familiar with *FlexDraft*. **Therefore, at an absolute minimum, I recommend that you *not* review the BEPS until you've completed the Tutorial. Ideally, you wouldn't spend any significant time with BEPS until you've drafted at least 5 or 10 estate plans with *FlexDraft*.**

(D) Quick BEPS

Located: On your PC as:
<C:\FlexDrft\Document\Resource\BEPSQ.wpd>
<C:\FlexDrft\Document\Resource\BEPSQ.doc>

The Quick BEPS is a 1 page, abbreviated version of the BEPS. It is also used as a client conference checklist and as drafting instructions. However, it leaves off most of the questions, relying on the defaults that are specified in the full BEPS. (Thus, the secretary or associate should use a copy of the full BEPS to fill in the details that are left out of the Quick BEPS.)

Admittedly, there are a lot of "standard" things in every estate plan. Just because *FlexDraft* empowers you to customize dozens of options in every Will, that doesn't mean you have to exercise that power in every case. Once you have satisfied yourself with the defaults, etc. in the BEPS (and modified the BEPS as necessary), the Quick BEPS lets you focus on the fundamentals without getting bogged down in the details. The Quick BEPS is also provided in WordPerfect & Word format to facilitate revisions to reflect your personal drafting preferences.

But even more than the regular BEPS, the Quick BEPS is a tool that you should use only after you've become very familiar with *FlexDraft*.

(E) WP Initial Codes

Located: On your PC as: <C:\FlexDrft\Document\Resource\inicode.wpd>

This WordPerfect document contains “Initial Codes” (and instructions) which help WordPerfect work better with *FlexDraft*, *when using the WordPerfect 5.1 file format*. If you intend to send *FlexDraft* documents to WordPerfect using the WordPerfect 5.1 file format, you should use this document to update your “Initial Codes” in WordPerfect (See part 7.01, “Update Your “Initial Codes”,” at page 29 of this manual.)

New for 2011: *FlexDraft* now supports the WordPerfect 6.0 file format (a/k/a the WP/6-X/4 file format). ***WP Initial Codes are no longer essential.***

Prior to version 2011.01, *FlexDraft* always used the WordPerfect 5.1 file format because it was a genuinely universal word processor file format. So long as you properly updated your WordPerfect Initial Codes, virtually every WordPerfect version could import *FlexDraft* documents with no complications.

Beginning with version X/3, WordPerfect has a few minor, but inconvenient formatting quirks whenever it imports a document created in the 5.1 file format. As a result, *FlexDraft* now gives you the option to export to WordPerfect in either the 5.1 format or the 6-X/4 format. When using the 6-X/4 format, *FlexDraft* is able to add its own Initial Codes to documents which override WordPerfect’s default Initial Codes. As a result, if you use WordPerfect as your word processor for *FlexDraft*, I recommend that you use the WP 6.0 file format (not the WP 5.2 format), in which case you do not need to worry about initial codes.

(F) Word Numbering Schemes

Located: On your PC in: <C:\FlexDrft\Document\Resou\Schemes>

Each of these Word documents contains a different “numbering scheme” that you can import into your version of Word. By importing one of these schemes, you help ensure that *FlexDraft* and Word use consistent formatting options. If you intend to use Word with *FlexDraft* you should review the numbering scheme documents, decide which one you like, and then import that scheme into Word. (See part 8.02, “Import an Existing Numbering Scheme,” at page 35 of this manual.)

1.04 Network Installations—Special Note

This is a brief overview of some issues to consider when installing *FlexDraft* on a network. Detailed instructions for network installations are below. (See part 2.03, “Network Installations—Additional Instructions”, at page 7 of this manual.)

(A) Generally

The preceding section and most of the rest of this manual assumes that *FlexDraft* was installed in a single user configuration, and that all files and folders are on the **C:** drive in the default installation directory (e.g., *FlexDraft* documentation is presumed to be in the <C:\FlexDrft\Document\Resource> directory). If *FlexDraft* has been installed on a network

drive, then you should generally substitute the network drive letter for **C:** (e.g., if the network drive letter is **H:**, *FlexDraft* documentation would be in the **H:\FlxDrft\Document\Resource** directory).

(B) Install on File Server First in a Shared Folder

Select a *shared* folder (preferably *not* a *root* folder) on the file server in which to install *FlexDraft*. (Optionally, “map” or “substitute” this folder on the server itself.) Then install a Single User “Full Install” version of *FlexDraft* on the file server in this folder. Then install a “New Network User” version of *FlexDraft* on each computer that will use *FlexDraft*. *Do the server install from the file server itself and tell the setup program that this is a Full Install installation.* This will put a complete, fully operational copy of *FlexDraft* on the server.

(C) Map the Network Drive on Every Workstation

Before you can install *FlexDraft* on a workstation, you must “map” the network drive/directory containing *FlexDraft* to a drive letter for that workstation. (This is discussed in greater detail below.)

(D) Register FlexDraft Only Once

The Registration process discussed below only needs to be completed once for the entire network.

(E) Setup FlexDraft Only Once

The Setup process discussed below only needs to be completed once for the entire network.

1.05 Conform WordPerfect/Word on Every Computer

Most computers that will be using *FlexDraft* with WordPerfect will not need to “conform” WordPerfect to work with *FlexDraft*, with one exception: If you choose to use the WordPerfect 5.1 export file format, you should upgrade the WordPerfect Initial Codes (see part 7.01, “Update Your “Initial Codes,”” at page 29 of this manual).

For every computer that will be using *FlexDraft* with Word, you should select and import a numbering scheme (see part 8.02, “Import an Existing Numbering Scheme,” at page 35 of this manual).

1.06 Different Parts of This Manual Are For Different People

If you’re a do-it-all solo with no support staff and no computer consultant, the *whole* manual is for you. Otherwise, you only need to read the portions addressing matters within your particular job description.

2. Installing FlexDraft

This part is for the computer tech or other individual responsible for installing *FlexDraft* on your computer.

2.01 Backup FlexDraft Files – If FlexDraft is Already Installed

These steps are necessary only if CAPS User for Windows (a/k/a WinCaps) is already installed on your computer. If you do not have a copy of CAPS User already installed on your computer, you can skip this step.

2.02 Uninstall CAPS User for Windows Before Installing FlexDraft

These steps are necessary only if CAPS User for Windows (a/k/a WinCaps) is already installed on your computer. If you do not have a copy of CAPS User already installed on your computer, you can skip this step.

If you do already have a copy of CAPS User installed on your computer, you need to get your computer tech to make backup copies of all your CAPS User files and then uninstall CAPS User before installing FlexDraft.

Why? FlexDraft needs CAPS User in order to function. The FlexDraft CD installs CAPS User on your computer before it installs the FlexDraft “System Files.” However, (i) FlexDraft expects CAPS User to be in the FlexDraft directory, C:\FlxDraft, and (ii) only one operational copy of CAPS User can be installed on your computer at any time.

If you make complete backup copies of all your CAPS User System files and Answer files before uninstalling CAPS User, and then, after you have installed FlexDraft, copy those files into the System and Answer subdirectories created by the FlexDraft CD, they should be fine.

2.03 Network Installations—Additional Instructions

These steps are necessary only if you are installing FlexDraft on a network. If you are installing FlexDraft on only a single computer, you can skip these steps.

(A) Select an Appropriate Network Location for FlexDraft

The characteristics and location of folder in which you install FlexDraft are important. If you choose a good folder before installing FlexDraft it will make the installation simpler and avoid complications down the road.

- *Recommended—Where Feasible:* Install the “main” (network) copy of FlexDraft on a “dedicated” file server instead of a user’s computer.

In larger networks where “everything goes on the server” this is a no-brainer. In smaller, simple networks where every computer has a regular user this is impossible; in that case you need to decide which computer is going to be your *de facto* file server for FlexDraft. This could be an attorney’s computer or an assistant’s computer. If you’ve already got a computer on which you store all your shared client documents, that’s a good choice for the computer that will house the FlexDraft system and data (which will be shared across your network).

- *Strongly Recommended:* Do **not** install FlexDraft in the root folder of the C: drive (or the root folder of any other drive).

Note: In a typical *single* user installation, FlexDraft *is* installed in the “root” directory,

that is, the main “FlxDraft” folder is installed directly in the C:\ drive, as follows:

C:\FlxDraft\

However, in a network installation, it’s best if *FlexDraft* is installed in a *folder or subfolder* of the root directory, for example:

C:\Data\FlxDraft\

This is because, as noted below, the folder containing *FlexDraft* must be a “shared” folder; thus, if *FlexDraft* is installed in a drive’s root folder you must share your root folder—**and sharing the root of your C: drive is a *very bad idea*** (it exposes your computer to the rest of the network, increasing the risk of viruses, etc.).

- **Mandatory:** Install the “main” (network) copy of *FlexDraft* in a “shared” folder.

The folder on the file server in which you install *FlexDraft* must be “shared” with every other user/computer on the network that will use *FlexDraft* in order for network users to have access to *FlexDraft*.

This should not be an issue for most offices. If other users/computers are already able to access documents on the “file server”, that means the file server is already set up to share the folder containing those documents. If *FlexDraft* is installed in the same folder, other users/computers should be able to access *FlexDraft* with no problems.

- **Recommended:** Map the folder containing *FlexDraft* consistently on every computer, including the file server.

As noted below, *every* network/user computer that will use *FlexDraft* must “map” the folder on the file server containing *FlexDraft* (i.e., a drive letter referring to the *FlexDraft* drive/directory must be specified). Although it’s not essential, I highly recommend that each computer use the same mapping letter for this folder because it helps avoid numerous technical problems that can arise (intuitively, it’s easy to see how it could be confusing when one computer says “it’s on the T: drive” and another computer says “no it’s not, it’s on the H: drive”).

This applies to every network user and to the file server too. True, the file server doesn’t *need* mapping to be able to find a folder on its own hard drive; however, mapping the file server to use the same letter for the folder containing *FlexDraft* that each network user computer uses preserves consistency. (Note: If you’re tech savvy, you might prefer to use drive “substitution” instead of drive “mapping” on the server. I’ve tested it and it works.)

(B) Install *FlexDraft* on File Server First

As noted above, you should install a Full Install version of *FlexDraft* on the file server before installing it on any workstation. It is possible to install it on the file server from another computer on the network; however, if you install from the server itself, you’ll get a fully function copy of *FlexDraft* on the server (plus, it’s simply easier to do the Full Install locally). Install a New Network User version of *FlexDraft* on each other network computer that will use *FlexDraft* only after completing the server installation.

(C) Verify “Mapping” of Network Drive Before Installing on Workstations

The *FlexDraft* Setup Program can easily install *FlexDraft* on a network hard drive where it is accessible by other computers on the network. However, on each computer that will use *FlexDraft*, the network drive/directory containing *FlexDraft* must be “mapped” (i.e., a drive letter referring to the *FlexDraft* drive/directory must be specified) *before* you can install *FlexDraft*. There are several ways to check whether a network drive has been mapped on an individual computer. This is one of the easier ones, assuming Windows XP (the steps for other versions of Windows are similar):

- From your computer’s “Desktop” right-click the **My Computer** icon (usually at the upper left of the screen). Select **Map Network Drive** from the pull down menu that appears. The “**Map Network Drive**” window will appear.

Note: If you can't find the My Computer icon, here's another way to get to the “Map Network Drive” window:

- Right-click the **Start** button and then select **Explore** from the pull down menu that appears. A Windows Explorer window will open.
- Left-click **Tools** on the menu and then select **Map Network Drive** from the pull down menu that appears.
- At the **Map Network Drive** window:
 - left-click the down-arrow for the **Drive** field. A pull down menu/list will appear.
 - Look for the network drive where *FlexDraft* will be (or has been) installed. *If the drive is mapped, it will be listed next to its assigned letter.* If this is the case you are ready to install a New Network User version of *FlexDraft* on this computer.
 - If the network drive is not mapped, you can map it as follows:
 - While you are still at the **Drive** field of the “**Map Network Drive**” window, use the pull down menu to select the drive letter you want to assign to the network drive.
 - Locate the **Folder** field (it’s below the **Drive** field; some Windows versions will call this **Path** instead of **Folder**). Left-click the Browse button; a “Browser for Folder” window will open.
 - Browse your network until you’ve highlighted the drive\directory on the file server that contains the FlxDrft directory (in which *FlexDraft* was installed).

For example, if FlexDraft was installed in T:\Shared\FlxDrft, you should highlight and map to T:\Shared (do not map to T:\Shared\FlxDrft).
 - Left-Click OK. You’ll be back at the Map Network Drive window.

- Check **Reconnect** at logon.
- Click the **Finish** button (some Windows versions will have an OK button instead).
- **Note: You must repeat the above steps on each computer on the network that will be using FlexDraft.**

2.04 Close Other Programs Before Starting the Installation

Before installing any new software on your system, it's always a good idea to save all your documents and other files and close all other applications that you may have running on your computer.

2.05 Start the Installation

When you download the *FlexDraft* setup program from the *FlexDraft* web site, your Internet browser should give you the opportunity to run the setup program immediately.

If, instead, you download the setup program to a file, be sure to remember the complete path to the file (its location or "directory structure"). After the download is complete simply browse to the setup program using Windows Explorer, then double click on the setup program, and the *FlexDraft* Welcome Screen should appear.

2.06 Go Through the FlexDraft Installation

The installation process is self-explanatory and very quick. You'll answer a couple of questions and, in about 2 minutes *FlexDraft* should be completely installed on your computer.

Note: I strongly recommend that you accept the default directory: C:\FixDrft. (In a network installation, the directories for the System, Document and Answer folders will have the mapped network drive letter in place of the "C".) The Installation program gives you the option of specifying alternative directories; however, specifying a different directory may make future troubleshooting more difficult and may complicate automatic updates (if the update program is not able to track down the alternative directory you specified).

Note: You might be prompted to restart your computer after installation. If so, please do so before continuing; otherwise, *FlexDraft* may not operate properly.

3. Uninstalling FlexDraft

If you ever need to uninstall *FlexDraft*, use Windows' "Add/Remove Programs" feature, as follows:

- Click **Start**, then select **Settings** and click **Control Panel**.
- At the Control Panel window, double-click **Add/Remove Programs**.
- You'll see a list of software that can be automatically removed by Windows. Select **FlexDraft Estate Planning System** then click **Add/Remove**.

- The *FlexDraft* Uninstall Program will begin; Select **Automatic** in the **Select Uninstall Method** window, and then click **Next**.
- Click **Finish** at the **Perform Uninstall** window.
- Click **OK** once the uninstallation is complete.

Note: When the uninstallation process is finished, *FlexDraft*, all client Answer files, and all documents saved in the *FlexDraft* Document directory may be permanently erased from your computer. So, if you want to retain, e.g., any documents you have saved in the Document directory, be sure to copy or move them *before* uninstalling *FlexDraft*.

4. Starting *FlexDraft*

Once *FlexDraft* is installed, there are several ways to start *FlexDraft*. They are listed below, beginning with the easiest.

4.01 From the Desktop

To start *FlexDraft*, double-click the **FlexDraft** shortcut on your computer's desktop. (The *FlexDraft* setup program put a shortcut to *FlexDraft* on your desktop. A picture of the *FlexDraft* shortcut is in the margin to the right of this paragraph.)



CAPS User will start and will automatically load *FlexDraft*, and the *FlexDraft* System window will appear.

4.02 From the Start Menu

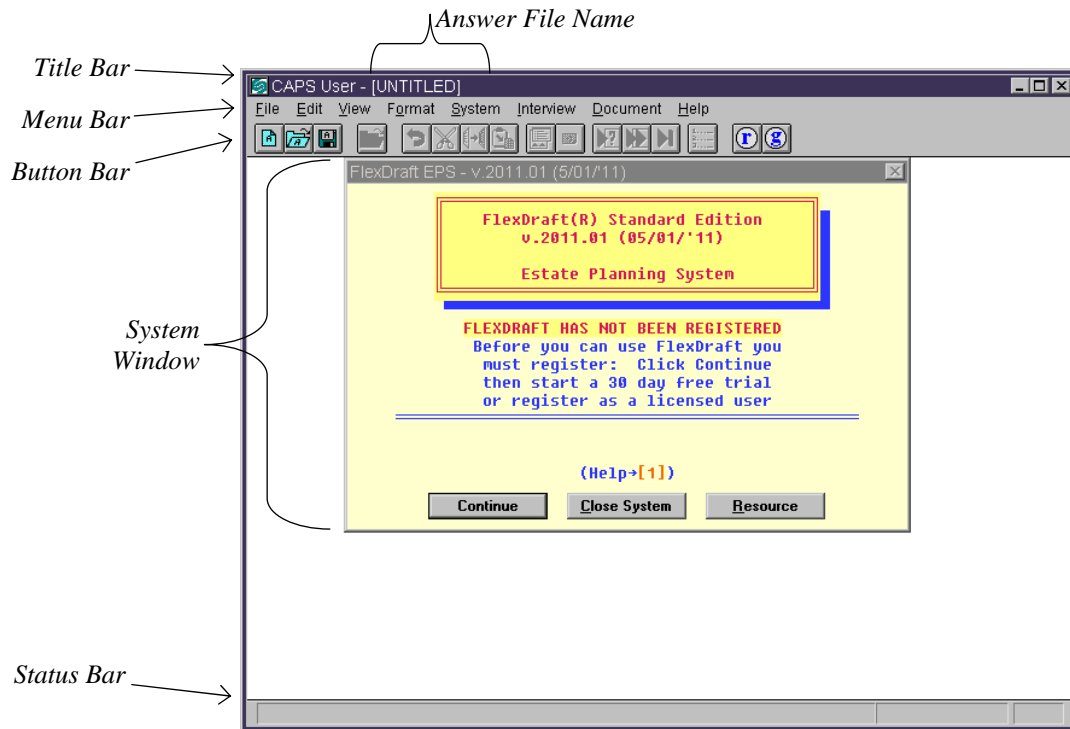
If you don't see the *FlexDraft* shortcut on your desktop, you can start *FlexDraft* from the Start menu as follows:

- Click **Start** on the start menu
- select **All Programs**
- select the **FlexDraft** Program Group
- click on **FlexDraft**

CAPS User will start and will automatically load *FlexDraft*, and the *FlexDraft* System window will appear.

4.03 Get to Know the CAPS User & *FlexDraft* Screens

When you start *FlexDraft*, you'll be looking at the *FlexDraft* Welcome Screen.



Before continuing, take a moment to familiarize yourself with the basic elements of CAPS User and *FlexDraft*:

- The **“CAPS User Title Bar”** is the bar at the top of the CAPS User program window; on the left side it displays the CAPS User icon followed by the words “CAPS User –” and the name of the current client Answer File (currently “[UNTITLED]”) and on the right it displays the standard minimize-maximize and close buttons you see in all Windows programs.
- The **“CAPS User Menu Bar”** is right below the Title Bar. It lists CAPS User’s command menus.
- The **“CAPS User Button Bar”** is right below the Menu Bar. Each button provides a shortcut to a specific CAPS User command. To see a button’s name, point to it with the mouse (without clicking it): The button’s name will pop-up next to the mouse and a brief explanation of the button’s function will display in the Status Bar (discussed below).
- The **“CAPS User Status Bar”** is the bar at the bottom of the CAPS User program window. The Status Bar displays **“Unanswered”** if a frame contains an unanswered question, **“Reanswer”** if a frame contains answers that are logically inconsistent, and **“Warning”** if a frame has a warning associated with it. It also describes the function of any Button or Menu command you point to with the mouse.
- The **“FlexDraft System Window”** is the window or “frame” in the middle of the screen.
 - Its Title Bar displays the words **“FlexDraft EPS”** and the version number and release date of your copy of *FlexDraft*.

- The body of the system window displays your firm name (unless you have the free trial version) and a brief summary of the status of your FlexDraft license.
- At the bottom of the *FlexDraft* System Window are 3 buttons:
 - The **Continue** button is self explanatory. (Virtually every window in *FlexDraft* has one or more buttons that help you move around in the program, like **Continue**, **Next**, **Previous**, **Select**, etc.).
 - The **Resources** button is on every *FlexDraft* frame (window) that has any “Resources”.

Resources contain explanations, suggestions, warnings and general info. Resources are your best source for help when using *FlexDraft*.

Resources pertaining to a specific field or other item on the frame often appear as an orange, bracketed number, such as “[1]”. To open one of these “local Resources” double-click on its number.



Whenever there is one, the best way to get quick, context sensitive help for a particular question or remark is to double-click it's orange bracketed Resource – “[n]”.

To list all Resources available for a particular frame, click the **Resources** button in the frame or click the resource button in the CAPS User Button Bar.



- The **Close System** button is evil! ***NEVER CLICK THIS BUTTON!*** Clicking it closes the *FlexDraft* system but leaves the CAPS User program open – which leaves you in a completely useless circumstance. (I've tried to get rid of it but can't; it's an integral part of the CAPS User program.)

If you do click this button—

- try clicking the Open System button on the Button Bar (which should become active once the *FlexDraft* System is closed); when the **Open System** window opens double-click **FlexDraft EPS** (which will be listed –if you're lucky), and *FlexDraft* should re-open; *otherwise*
- Close the CAPS User program and then re-start *FlexDraft*.



5. Register *FlexDraft*

After you start *FlexDraft* but before you can use *FlexDraft* you must either initiate a 30-day free trial or register as a licensed user.

5.01 Register for a 30-Day Free Trial

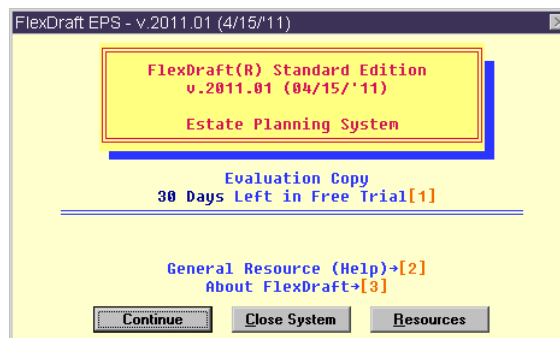
(A) Initiating the Free Trial

To initiate your 30-day free trial:

- Start *FlexDraft*. (See part 4, “Starting *FlexDraft*,” at page 11 of this manual.)
- At the *FlexDraft* System window, click **Continue** or press <Enter>.
- The **FlexDraft Main Menu** will appear. (Access is restricted until you start your free trial or register as a licensed user.)



- Double-click **30-Day Free Trial**.
- The explanatory **30-Day Free Evaluation** window will appear. After you review the explanation click **Next**.
- Click **Next** again at the congratulatory **Activation Evaluation Confirmed** window.
- At this point you will be back at the **FlexDraft Main Menu**; however, that menu will have changed slightly: “**30 Day Free Trial**” will no longer appear as a menu option and your access to the menu will no longer be restricted. Also, “<UNANSWERED>” will probably appear next to the first menu option, “**FlexDraft Setup**” (more on this below).
- Press the <Escape> Key to return to the *FlexDraft* System Window, which will now indicate that you have a *FlexDraft* Evaluation Copy with 30 Free Days Left. You are almost ready to begin using *FlexDraft*.



Note: Avoid adjusting your computer’s calendar; alterations to the system date may cause errors in *FlexDraft* and trigger a premature shutdown of your copy.

(B) Limitations of the Free Trial Version

The free trial option activates *FlexDraft* for 30-days, allowing you to evaluate it without paying a licensing fee. At the end of the 30-day period you will have the option to extend the free trial for

an additional 15 days. At the end of the free extension *FlexDraft* will stop functioning unless you become a registered licensee.

There are also some functional limitations to the free trial version. For instance, in a fully licensed version you can create long lists of: your favorite corporate fiduciaries, cities and counties you frequently specify, etc. These lists are then available in pull-down look-up lists for quick pasting into documents. However, in the free trial version only 2 entries in each category are generally allowed. Also, the free trial version limits you to only one attorney and it does not let you specify your firm name, and it limits the number of children to 2. (The fully licensed version has none of these limitations.)

5.02 Register as a Fully Licensed User

If you have registered for the 30-day free trial, you can skip this part until you are ready to convert to a fully licensed copy of *FlexDraft*.

(A) Step 1: Obtain License and get Activation Key

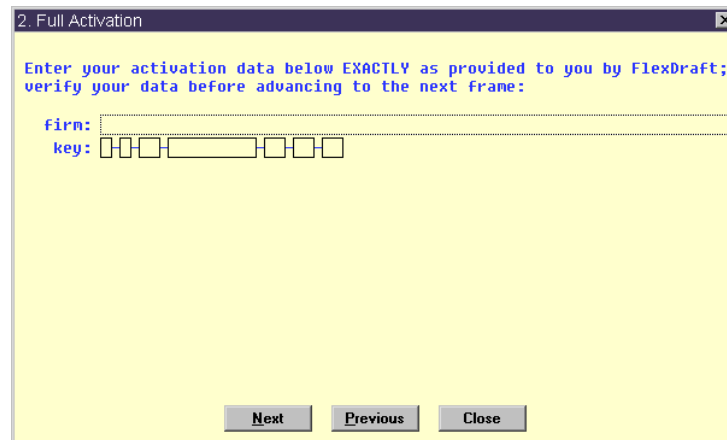
Before you attempt to convert a *FlexDraft* evaluation copy into a fully functional copy, you must contact *FlexDraft*, obtain your license, and get your “Activation Key.” (The same is true if you skip the free trial and go directly to fully licensed user status.)

Note: The Activation Key is an encrypted code based, in part, on your firm name and the number of attorney licenses you acquire. If you change your firm name or the number of attorney licenses, you must obtain a new Activation Key. *So be sure the firm name you provide when obtaining your Activation Key is accurate.*

(B) Step 2: Activate *FlexDraft*

Once you have purchased your license and obtained your Activation Key, activate *FlexDraft* as follows:

- Start *FlexDraft*. (See part 4, “Starting *FlexDraft*,” at page 11 of this manual.)
- At the *FlexDraft* System window, click or press <Enter>.
- The **FlexDraft Main Menu** will appear.
- Double-click **Register as a Licensed User**.
- Read the explanatory Full Activation window and click if you are ready to proceed.
- The **Full Activation** window will appear.



- Enter your firm name *exactly* as it is shown on your *FlexDraft* Invoice. Be sure you completely delete the existing firm name, if any.
- Enter your Activation Key in the row of boxes under your firm name *exactly* as it was provided to you, including leading zeros. (Note: Do not enter the dashes between the different parts of the key; instead, enter each part in its box, then tab to the next box and enter the next part.)
- Once you've correctly entered your firm name and each part of your Activation Key, *FlexDraft* should display **Activation data is valid!** and give you the option to **Finalize / Cancel the activation process**. Select “**F**” (Finalize) and then click **Next**.
- *Note:* If your firm name and Activation Key do *not* match, *FlexDraft* will indicate **Invalid Activation data!** If this happens, double check your entries carefully and correct any errors (every letter, space, & other character must be exactly correct). The moment your firm name and Activation Key match *FlexDraft* will tell you your Activation data is valid and you'll be able to finalize the activation process as per the above. If you can't eliminate the “Invalid Activation data” message, click **Next** to cancel the Activation process..
- The **Full Activation Results** window will appear. If your firm name and Activation Key match, this window will inform you that *FlexDraft* has been fully activated and will specify the details of your *FlexDraft* license. Click **Next**. You will be back at the **FlexDraft Main Menu** window.
- Press the <Escape> Key to return to the **FlexDraft System Window**, which will indicate that you are now a fully licensed user.

Note: *If your firm name and Activation Key do not match*, the **Full Activation Results** window will inform you of this fact. You can click **Previous**, return to the **Full Activation** window, and re-enter your firm name and Activation Key (to correct a typo, etc.). However, if your firm name and Activation Key simply do not match your only option is to click **Next** to return to the **FlexDraft Main Menu**.

- If you had a Free Trial version of *FlexDraft*, your free trial period should still be valid (assuming it's not expired).

- If you already had a valid, fully licensed copy of *FlexDraft*, your prior Activation Key should be restored.
- If your existing *FlexDraft* license was invalid (and in certain other circumstances), the Main menu will now indicate that you have a “Corrupted FDD File”. *FlexDraft* will not be operational until you obtain a valid Activation Key.

In any of these cases, contact *FlexDraft*.

6. Setup *FlexDraft*

After *FlexDraft* is installed and registered (whether for 30 free days or full activation registration), the Setup procedure allows you to: (i) fill in or update information about your firm and the attorneys in your firm; and (ii) specify default lookups and document formatting and drafting preferences, etc.

You must complete Setup before using *FlexDraft*; however, once Setup information has been entered, it is automatically filled in for all subsequently created client “answer” files. This is a big time saver that substantially reduces the risk of mistakes.

6.01 Introduction to QuikPics

During setup you will have several opportunities to create QuikPics.

A QuikPic is an abbreviation or nickname for a person, a city, a county, etc. QuikPics can be 1 to 4 characters long. QuikPics facilitate quick, accurate insertion of names and other information in “fill-in” fields during a dialogue. For example, if a name field has a QuikPic, you can type the QuikPic for the desired name into the field, and the full name will automatically be inserted as soon as you move to the next field.

Some QuikPics are built in to *FlexDraft*. For example, all 50 states have their 2 letter postal abbreviations as QuikPics and Texas has the additional QuikPic of the single letter “t” (because it’s used so frequently). Additional QuikPics are provided by you during the Setup procedure. This allows you to choose the specific abbreviation you prefer for the names, etc. that you include in your Setup information, and to change the abbreviation whenever you please.

Note: To find out whether a field has QuikPics, simply right-click the field and if QuikPics are available, a list of possible answers will pop up. You can also type a known (or guessed) QuikPic into the field; if QuikPics are available—and if you correctly typed an existing *QuikPic*—the full name will be inserted when you move to the next field.

Also, whenever the cursor is in a field that has QuikPics, the “Pop-up” button on the button bar will be active (it will be in color instead of grayed out).

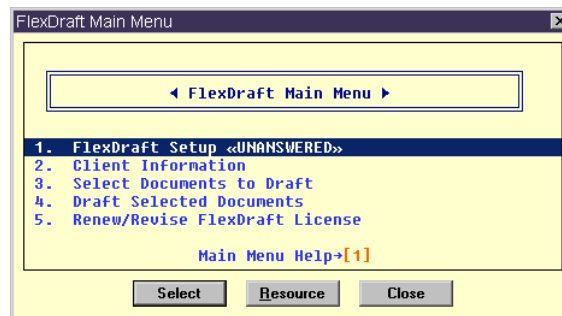


6.02 Starting Setup—Get to the Setup Menu

To begin *FlexDraft* Setup, you need to get to the [FlexDraft Setup](#) menu, as follows:

- Start *FlexDraft*. (See part 4, “Starting *FlexDraft*,” at page 11 of this manual.)

- At the *FlexDraft* System window, click **Continue** or press <Enter>.
- The **FlexDraft Main Menu** will appear. Double-click **FlexDraft Setup**. The **FlexDraft Setup** Menu will appear.



You are now ready to go through each of the Setup parts.


Note: The notation «UNANSWERED» will probably be appended to the FlexDraft Setup menu item, indicating that there is at least one required question in the Setup dialogue is unanswered. For a more detailed explanation, double click the orange [1] to open the Main Menu Help Resource, and then double-click the help topic “«UNANSWERED»” [Menu Notation](#).

6.03 Setup—Firm

- Get to the Setup menu. (See part 6.02, “Starting Setup—Get to the Setup Menu,” above.)
- Double-click **Firm Setup**. Then double-click **General, Address**. The **Firm Address** Setup frame will appear and you can begin filling in information about your firm.

- **Firm name:** Note that you cannot fill in or change your firm name during Setup; the field is “grayed-out” and inactive. Also note that the Firm name field has a Resource, as indicated by the orange, bracketed “[1]” next to it.
 - Double Click the [1] to open the Resource for the Firm name field (which will explain that you cannot alter your firm name in FlexDraft Setup, that changing

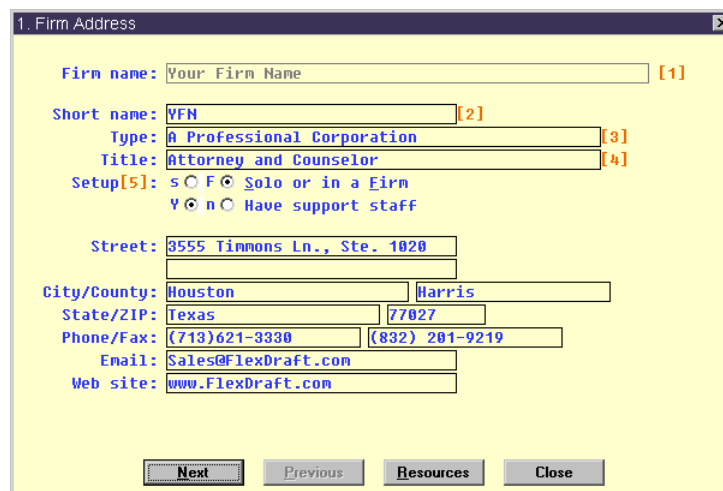
your firm name requires a new Activation Key and, that therefore, revisions to your firm name must be made through the registration process). (See part 5.02, “Register as a Fully Licensed User,” at page 15 of this manual.)

- **REMEMBER:** Whenever a particular option has a Resource (e.g., “[1]”), you can double-click to open the Resource for help. For example ...
- **Short name:** Double Click the [2] to open the Resource for the Short name field and then complete that field appropriately.
- **Firm type:** [optional] Double Click the [3] to open the Resource for the Firm type field, then, *try this:*
 - After you close the Resource put the cursor in the Firm type field (tab to it or click in it with the mouse). Look at the CAPS User Button Bar; the “Pop-up” button will be active. Whenever the Pop-up button is active it means the field with the cursor has pop-up options. 
 - Right click in the Firm type field or left-click the Pop-up button to see a table of firm types; double-click the one you prefer (or close the table and manually type your own alternative language – or just leave it blank (since it is, after all, an optional field).
- **All remaining fields:** Complete the remaining fields on the frame using the Resources for guidance; be sure to take advantage of the available Pop-ups.

Note: The following components of the address are *required*: Street 1st line, City, County, State, ZIP, and Phone. The following components are *optional*: Street 2nd line, Fax, and Web site (and, as noted above, Firm type and firm title are also optional).

If an optional field is inapplicable, just leave it blank and *FlexDraft* will ignore it. So, for example, if you don’t have a web site, simply leave that field unanswered. *Do not type in a blank line* (i.e., underscore characters) unless you want a blank line to print in the final documents *FlexDraft* creates.

- **Example:** When you're finished, the **Firm Address** setup Frame might look like this:



1. Firm Address

Firm name: Your Firm Name [1]

Short name: VFM [2]

Type: A Professional Corporation [3]

Title: Attorney and Counselor [4]

Setup[5]: F Solo or in a firm
 n Have support staff

Street: 9555 Timmons Ln., Ste. 1020

City/County: Houston Harris

State/ZIP: Texas 77027

Phone/Fax: (713)621-3330 (832) 201-9219

Email: Sales@FlexDraft.com

Web site: www.FlexDraft.com

Next Previous Resources Close

- When you're done, click **Next** to return to the **Firm Setup** menu.

6.04 Setup—Letterhead

- Get to the **FlexDraft Setup** menu. (See part 6.02, “Starting Setup—Get to the Setup Menu,” above.)
- Double-click **Firm Setup**. Then double-click **Letterhead, etc.** The **Letterhead, etc.** Setup Frame will appear.
- Specify your preferences for letterheads, memo-heads, etc. If you have any questions about a particular option, double-click on its Resource (indicated by an orange, bracketed number, such as “[1]”).
- *Example:* When you're finished, the Firm Letterhead, etc. Setup Frame might look like this:

1. Letterhead, etc.

Always Include--

"Prepared by" note in cover pages [1]

Letterhead in letters [2]

3 column or 1 column letterhead [3]

Memo-head in memos [4]

Options:

Phone # reference: Tel [5]

Fax # reference: Fax [6]

Include "Board Certified" on letterhead [7]

Next Previous Resources Close

6.05 Setup—Attorneys

- Get to the **FlexDraft Setup** menu. (See part 6.02, “Starting Setup—Get to the Setup Menu,” above.)
- Double-click **Firm Setup**, then double-click **Attorneys**. The Attorneys Setup frame will appear.
- **Number of attorneys in your firm:** The number of attorney licenses you have acquired will already be displayed. If you wish to list fewer attorneys than the number of attorney licenses, you can enter a smaller number.

Notes:

- The free trial edition is limited to 1 attorney. After you become a registered licensee you will be able to specify as many attorneys as you have licensed.
- You cannot increase the number of attorneys above the number of attorney licenses you have obtained. Increasing the number of attorneys requires a new Activation Key and, therefore, increases to the number of licensed attorneys must

be made through the registration process. (See part 5.02, “Register as a Fully Licensed User,” at page 15 of this manual.)

- If you license more than 3 attorneys, the entire Attorneys frame will not fit on your computer screen at one time. This is OK. When you finish the information for the last attorney on the screen, click **Next** to proceed to the next attorney.
- Specify information for each licensed attorney, as follows:
 - **Name:** Fill in the attorney’s full name, as it will appear in signature lines, etc.
 - **Initials:** Fill in the attorney’s initials. If you want them to print in all caps, enter them in ALL CAPS.
 - **M/F:** Fill in “M” or “F,” indicating the attorney’s gender.
 - **QuikPics:** [optional] Fill in up to 4 characters to be used as a QuikPic for this attorney. (See part 6.01, “Introduction to QuikPics,” above.) Two QuikPics are available for each attorney.

Note: When assigning Attorney QuikPics, be sure that each QuikPic is unique.

- **Asst:** Fill in the first name (initial cap) and initials (typically all lower case) for the secretary or other assistant to this attorney.
- *Example:* When you're finished, the Attorney setup Frame might look like this:

1 Attorneys

Number of attorneys using FlexDraft: [1]

Attorney information[2]:

Name: M/F:

Initials: QuikPics: #1: #2:

Asst: Title: Initials:

- When you’re done with Attorney Setup, click **Next** two times to return to the [Firm Setup](#) menu.

6.06 Setup—Lookup Lists

FlexDraft Lookup Lists store commonly used information and make that information available throughout FlexDraft. Currently, FlexDraft has 1 built-in (pre-defined) Lookup List of the American States, and 3 user-modifiable Lookup Lists – Cities, Counties, and People – in which you can enter the cities and counties where your clients typically live, as well as the banks, trust companies, etc. that your clients typically name as fiduciaries. You can also specify QuikPics for each item you enter. (See part 6.01, “Introduction to QuikPics,” above.)

Then, when entering a city, county, etc. for a client or other person, you can right click on the particular field to bring up the appropriate list, and then double-click the desired entry and it will be pasted into the field.

Note: The free trial edition is limited to 2 default lookups in each category. After you become a registered licensee you will be able to specify as many as you like.

- Get to the [FlexDraft Setup](#) menu. (See part 6.02, “Starting Setup—Get to the Setup Menu,” above.)
- Double-click [Lookup Lists](#).
- The [Lookup-Cities](#) frame will appear.
 - Click “**y**” to enable the Cities Lookup List.
 - Fill in the number of cities to be listed.
 - For *each* city, fill in the name of the city and, optionally, fill in up to 2 QuikPics. (See part 6.01, “Introduction to QuikPics,” above.)

Note: If you have a long list of cities, it may not fit on one screen. In this case, when you finish the last city on the screen, click [Next](#) to proceed to the next city.

- *Example:* When you're done, the [Lookup Cities](#) Frame might look like this:

	City	QuikPic#1	QuikPic#2
1.	Houston	hou	h
2.	Sugar Land	sl	suq

- When you finish with the last city (or if you do not enable default lookups for cities), click [Next](#).
- The [Lookup Counties](#) frame will appear.
- The procedure for filling in default lookup counties is the same as for cities; please refer to the preceding instructions.

- *Example:* When you're done, the **Lookup Counties** Frame might look like this:

Note: The single letter “**h**” is a *County* QuikPic – for “Harris” – and also a *City* QuikPic – for Houston. Although no two options in the same QuikPic category (such as “Cities,” “Counties”, or “People”) can have the same QuikPic, options in different categories **can** have the same QuikPic.

You could conceivably use the single letter “**h**” as the QuikPic for—

- the *city* “Houston”,
- the *county* “Harris”, and
- the *attorney* “Harry Smith”, and
- the *person* “Humongous Trust Company FSB.”

I use “**h**” for “Houston” (city) and for “Harris” (county), and “**t**” is a built in QuikPic for “Texas.” As a result, I can enter the city, county and state for my typical client in about half a second – with zero typos guaranteed: After entering the street address I tab to the field for city then type:

h <tab> **h** <tab> **t** <tab>.

- When you finish with the last county (or if you do not enable default lookups for counties), click **Next**.
- The **Lookup People** frame will appear.

Note: The Lookup People feature in *FlexDraft Setup* lets you specify names and addresses of one or more persons (individuals or corporations) to be included in the look-up lists for *all* client answer files. Use this feature to specify, e.g., an accurate list of banks and corporate trustees, and then paste any entity on that list into *any* client answer file (as executor, trustee, etc.) without retyping. *Do not use this feature to specify persons who will be named in the estate plan of only one client* (or only one pair of husband/wife joint clients). Instead, if a person will be involved in only a single estate plan, enter the person’s name in the “Client Information” dialogue for the appropriate client. (The Tutorial teaches you how to do that.)

- Click “**y**” to enable the People Lookup List.

- Fill in the number of persons to be named. Then click **Next**.
- The **First Named Person** frame will appear.
 - Specify whether this person is an **Individual** or a **Corporate** entity.
 - Fill in the person's full name as it will appear in documents.
 - For individuals only, select "M" or "F" to specify gender.
 - Fill in the person's address and phone number. **Note:** The full address and phone number are not required in all documents; however, entering complete, accurate information is still advisable inasmuch as it ensures accuracy whenever full information is called for.
 - When finished click **Next**. You'll proceed to the next person, if any, otherwise you'll conclude the People Lookup List.
- *Example:* The Frames for individual and corporate named persons might look like these:
 - *Named Individual:*

4. First Named Person

Individual or Corporate

Name:

M F Gender

Street:

City/County:

State/ZIP:

Phone:

- *Named Corporation:*

5. Second Named Person

Individual or Corporate

Company Name:

Street:

City/County:

State/ZIP:

Phone:

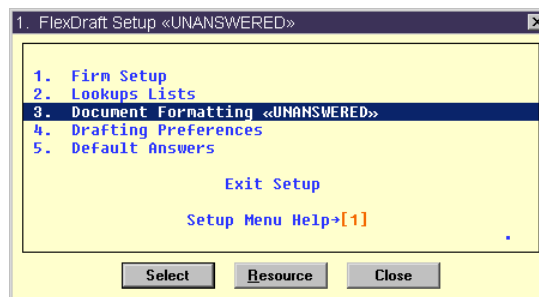
6.07 Setup—Document Formatting

The Document Formatting part of *FlexDraft* Setup allows you to control various aspects of the appearance of documents created with *FlexDraft*. This manual addresses limited document formatting options; however, document formatting options should all be self explanatory, and most of the formatting options include explanatory Resources.

(A) WordPerfect Users Can Skip Document Formatting Setup

If you use WordPerfect as your word processor, then you have the option of skipping the Document Formatting portion of *FlexDraft* Setup, *if it is not in “Unanswered” status*. (When *FlexDraft* is initially installed the Document Formatting will be “Answered”; it will be “unanswered” only if someone opened the Document Formatting dialogue and then left one or more fields blank when closing the dialogue.)

*Do NOT skip
Document
Formatting if it's
“Unanswered”*



If you don't have strong feelings and/or specific preferences regarding document formatting, or if you simply want to start using FlexDraft as quickly as possible, you can use FlexDraft's default Document Formatting for now and skip down to part 6.08, “Drafting Preferences & Default Answers.” (You can change FlexDraft's Document Formatting at any time.)

(B) Microsoft Word Users Only – Optionally Select a Coordinating “Numbering Scheme”

If you use Microsoft Word as your word processor then, *before continuing with your Document Formatting Setup in FlexDraft, you really ought to—*

- **Select the specific “numbering Scheme” for Word to use to format the Wills and trusts you prepare with FlexDraft.**

By picking a numbering Scheme before completing the Document Formatting portion of your *FlexDraft* Setup, you can ensure that *FlexDraft* and Microsoft Word format documents consistently. This helps keep documents formatted according to your preferences, and helps avoid the complications that can result whenever *FlexDraft* and Microsoft Word have inconsistent format settings.

If you have specific preferences regarding document formatting, you should pick a numbering Scheme now, before going through FlexDraft's Document Formatting Setup. (See part 8.02, “Import an Existing Numbering Scheme”, below, for specific instructions.)

Alternatively, you might decide to—

- **Just use FlexDraft’s default numbering Scheme (for now).**

By using FlexDraft’s default numbering Scheme you defer the debate over “**bold vs. underlined**”; “standard layout vs. outline layout”, etc., and you get to skip going through the Document Formatting portion of FlexDraft’s setup; however, you should still import a FlexDraft numbering Scheme – the default numbering Scheme – into Word (discussed below).

If you aren’t especially concerned about document formatting details, if your primary concern is FlexDraft’s substantive provisions, and/or if you simply want to start using FlexDraft as quickly as possible, you can use FlexDraft’s default numbering Scheme for now. If you decide to change to a new numbering Scheme later it could be a headache but not necessarily a big one.

Explanation: Microsoft Word doesn’t like FlexDraft or any other program telling it how to format a document. This is true for essentially all aspects of a document’s paragraph numbering and associated layout, *a/k/a, its “numbering Scheme.”* In this manual, the term “numbering Scheme” means:

the, fonts, numbering styles and indentations associated with automatic paragraph numbering.

In particular, Word generally ignores the numbering Scheme specified by FlexDraft and formats documents using one of its own numbering Schemes instead.

When you fight Word’s authority, Word’s authority almost always wins. On the other hand, if you respect Word’s authority, letting it enforce direct control over numbering Schemes, Word will do an excellent job of maintaining consistent formatting for *all* your documents (not just the ones created by FlexDraft), increasing the likelihood that your FlexDraft documents will match your other documents.

- Thus, in the spirit of “go-along to get-along”, FlexDraft’s solution embraces the following reasoning:
 - The Word ~ FlexDraft formatting conflict issue is moot if FlexDraft and Word use consistent numbering Schemes.
 - FlexDraft and Word *will* use consistent numbering Schemes if you import one of FlexDraft’s standard numbering Schemes into Word.
 - You can import one of FlexDraft’s standard numbering Schemes into Word in about 45 seconds per computer (although it may take you a lot longer to decide which number Scheme you prefer).
- **So: If you know** (or you’re ready to decide) how you want to number and format your Wills and trusts, you should—

- skip to part 8.02, “Import an Existing Numbering Scheme”, at page 35 of this manual, and follow the instructions there to review the available numbering Schemes and then import the numbering Scheme you prefer;
- then return to part 6.07(C), “Document Formatting Setup – Specific Steps”, at page 27 of this manual, and set your *FlexDraft* Document Formatting Setup options to match those of the Scheme you selected.
- **If you do not know** (and you want to put off deciding) how you want to number and format your Wills and trusts, you should—
 - skip part 6.07(C), “Document Formatting Setup – Specific Steps”, at page 27 of this manual.
 - skip the Document Formatting portion of the *FlexDraft* Setup (just use the default settings for now),
 - skip part 8.02, “Import an Existing Numbering Scheme”, at page 35 of this manual (when you get to it),
 - make a note reminding yourself that, before you start cranking out lots of documents in *FlexDraft*, you should go back and address these issues, and
 - skip down to and continue with part 6.08, “Drafting Preferences & Default Answers”, at page 28 of this manual.

But be warned: If you don’t import a numbering Scheme, *FlexDraft* documents opened in Microsoft Word may be numbered oddly, incorrectly, or not at all. You’ll be happier – and your experience with *FlexDraft* will be much more meaningful – if you go ahead and import a numbering Scheme now.

(C) Document Formatting Setup – Specific Steps

- Get to the [FlexDraft Setup](#) menu. (See part 6.02, “Starting Setup—Get to the Setup Menu,” at page 17 of this manual.)
- Double-click [Document Formatting](#).
- The [Format-Basic](#) frame will appear.

Note that “<<[Default Answers Mode](#)>>” appears at the top of the frame. This banner appears as a reminder that you are in “Default Answers mode” and that, therefore, the selections you make will generally apply firm-wide (to all clients). The banner would be “<<[Client Specific/OverRide Mode](#)>>” if you were viewing this frame in “Client Specific/OverRide mode” (where your selections would generally apply to only a single client). This banner appears on certain frames that can be viewed in *either* mode

- Make your selection for each of the formatting options presented. Use the Resources to guide you through each option.

- I *strongly* recommend that, under the heading “**Advanced Formatting Options**”, you
 - select **Reset advance options to default settings**, and
 - do not select **Activate advanced options dialogue**.

This will ensure that you have consistent format settings for now and let you avoid the powerful – yet complicated – advance formatting options that *FlexDraft* has to offer.

- When you finish the **Format-Basic** frame, click .

6.08 Drafting Preferences & Default Answers

Note: *It is perfectly OK to skip both the Drafting Preferences section and the Default Answers section when you’re just getting started with FlexDraft. In fact, I recommend that you ignore both sections until you’ve used FlexDraft long enough to become comfortable with the program.*

* * *

This Getting Started Manual does not walk you through the Drafting Preferences or Default Answers sections. (With the experience of having completed the other Setup sections, plus the occasional References, you should be able to complete them with no problem). Instead, the rest of this discussion addresses the conceptual and practical aspects of both sections.

Drafting Preferences and Default Answers are closely related and very similar but they have some important differences.

Both sections let you specify “standard” wording & practices for estate planning documents (e.g., how you word your enumeration of personal effects). Both sections do this by letting you provide “default” answers to selected questions (e.g., whether you like to specify a minimum witness age of 14 or 18 – or some other age – in the self proving affidavit).

Also, all of the standard, firm wide choices you make in both the Drafting Preferences section and the Default Answers section (and the Formatting section as well) can be overridden by “Client Specific” choices you make for a particular client. By contrast, when you make (or revise) choices in Firm Setup or you add (or revise) Lookup Lists, your choices (or changes) always apply firm wide, to all clients.

All Drafting Preferences and Default Answers you specify are preserved whenever you update your FlexDraft System. I’m very enthusiastic about this feature because, from what I’ve seen, almost every document assembly system that allow you to customize language will overwrite all your customizations with every update, requiring you to either constantly re-customize or else forego updates. (The downside is that the programming required to preserve your updates is time consuming; that’s why *FlexDraft*’s list of drafting preference and default answer options still somewhat short).

The main difference between Drafting Preferences and Default Answers is *conceptual*:

- The Drafting Preferences section is generally directed towards matters of *individual attorney preference*; e.g., whether to word monetary gifts as “I give five dollars to ...” or as “I give *the sum of* five dollars to ...”. Attorney A will make different drafting preference choices than Attorney B; and each attorney will generally make the same drafting preference choices for all of his or her clients.
- The Default Answers section is generally directed towards matters of *individual client appropriateness*; e.g., [whether there are and] whether to enumerate any “a/k/a” or “f/k/a” names for the client. Attorney A might like to presume that each client does not have any “a/k/a’s” (and change the presumption if/when a particular client does) while Attorney B might prefer to make no such presumption and, instead, pause and address the issue for every client. But, obviously, both attorneys should draft Wills that recite a/k/a’s for all clients that have them.

The most apparent difference between the two sections is structural:

- You must fully “answer” *every* Drafting Preferences question during Setup; if any question is left unanswered the entire *FlexDraft* Setup section becomes “Unanswered” (which causes unpredictable, undesirable consequences). But when drafting documents for a particular client, you rarely change any of your Drafting Preferences. For the most part the questions won’t even be presented to you (unless, e.g., you activate “Advanced” options).
- You don’t have to answer *any* Default Answers questions during Setup; the Default Answers section has no effect on the “Answered” or “Unanswered” status of *FlexDraft* Setup. But when drafting documents for a particular client, every question in the Default Answers section will be presented to you (if relevant) and you will frequently change the answer.

Finally, you may notice that the Drafting Preferences and Default Answers sections are both relatively brief. This is due, in part, to the fact that both are fundamentally contrary to the thesis and design of *FlexDraft*, which is to reject “standardized” drafting and embrace & facilitate highly flexible drafting. *FlexDraft* makes it very easy to produce a very different document for each client. Interposing standard, default presumptions does little to make the process any faster or easier than it already is yet significantly increases the tendency to draft standardized, one-size-fits-all documents.

7. WordPerfect and *FlexDraft*

Note: *This part of this manual is relevant only if you’ll be using WordPerfect as your FlexDraft word processor. If you’ll be using Word, skip to part 8, “Microsoft Word and FlexDraft,” at page 33 of this manual.*

7.01 Update Your “Initial Codes” IF Using the WP/5.1 File Format

Note: *Most users can skip to subpart 7.03. This subpart 7.01 and the following subpart 7.02 are only relevant if (i) you use WordPerfect and (ii) you’ve decided (for whatever reason) to use the WP/5.1 file format.*

As noted above (see subpart 1.03(E), “WP Initial Codes,” at page 5 of this

manual), if you'll be using WordPerfect with FlexDraft, I recommend that you use the WordPerfect 6.0 file format (which is the default format that will be used unless and until you specifically change it).

If you'll be using WordPerfect with FlexDraft and if you prefer to use the WordPerfect 5.1 file format, I urge you to modify your "initial codes." Doing so will add consistency from document to document, facilitate certain formatting used by FlexDraft, and avoid one particular shortcoming with WordPerfect automatic paragraph numbering: If you use outline numbering for normally formatted paragraphs and accidentally backspace over the outline code at the beginning of the document, WordPerfect will reformat the entire document as an outline—*permanently. The Undo feature does not fix it.* However, if your outline code is part of your initial codes, it generally cannot be deleted accidentally.

You can update your WordPerfect Initial Codes as follows:

- From the Start menu:
 - Click **Start** on the start menu.
 - Select **Programs** (or **All Programs**).
 - Select the **FlexDraft** Program Group.
 - Click on **Word Perfect Codes**.

Word Perfect will start and will automatically load the following document: [inicode.wpd](#). *Note:* It's possible that the preceding won't work. *If it doesn't work* you can get to the same place as follows:

- From within WordPerfect:
 - Start WordPerfect.
 - Open the following document: [C:\flexdraft\document\Resource\inicode.wpd](#).
Note: this assumes you accepted the default installation folder. If you did not, go to the directory in which you installed FlexDraft; there will be a subdirectory named "Document" and in that subdirectory you'll find the document "inicode.wpd."
- Review this document if you are interested in the details and/or how to apply the initial codes to an existing document that does not have them.
- Reveal codes with <Alt-F3>.
- In the reveal codes window, double click the code **Open Style: Initial Style** (sometimes it's displayed as **Open Style: Document Style**). It will be the *first* code in the reveal codes window.
- The Styles Editor window will open. Check **Use as Default**. Click **OK**. The Styles Editor window will close.

- WordPerfect may ask whether to [apply styles to all new documents](#). If it asks, click **Yes**.

Your WordPerfect Initial Codes are now updated.

Note: If you already use initial codes and you want to preserve them along with the initial codes in the inICODES.WPD document, you can. Open up any document containing your previous initial codes; reveal codes; open up the Styles Editor window; and then block/copy the codes you want to retain. Then return to inICODES.WPD; reveal codes; go to the Styles Editor for the initial codes; and paste the codes you just copied. Check [Use as Default](#). Click **OK**.

7.02 Verify That Your PC Recognizes The “.WP” Extension for WordPerfect Documents, *IF* Using the WP/5.1 File Format

Note: *Most users can skip to subpart 7.03. This subpart 7.02 and the preceding subpart 7.01 are only relevant if (i) you use WordPerfect and (ii) you’ve decided (for whatever reason) to use the WP/5.1 file format.*

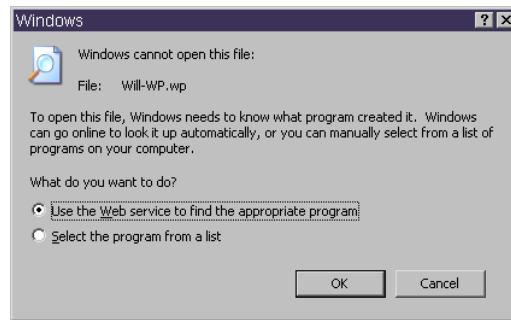
As noted above (see subpart 1.03(E), “WP Initial Codes,” at page 5 of this manual), if you’ll be using WordPerfect with FlexDraft, I recommend that you use the WordPerfect 6.0 file format (which is the default format that will be used unless and until you specifically change it).

When FlexDraft generates documents in the WordPerfect 5.1 file format it gives them the document extension: “.WP”. It’s possible that your computer doesn’t recognize documents with the “.WP” extension as [old] WordPerfect documents. You can verify whether this is a problem (and fix it quickly and easily if it is a problem) as follows.

- Click **Start** on the start menu.
- Select [Programs](#) (or [All Programs](#)).
- Select the [FlexDraft](#) Program Group.
- Click on [Sample Will-WP](#).

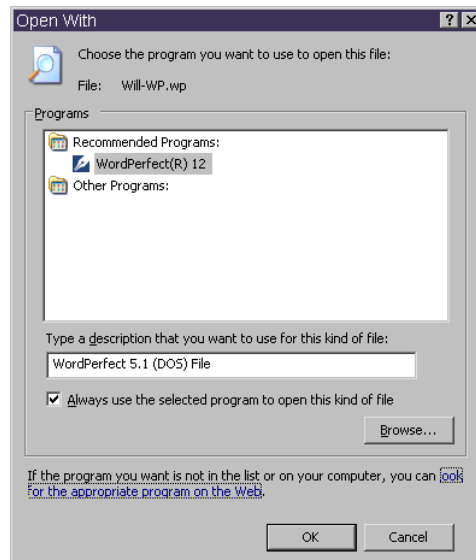
If your computer properly recognizes the “.WP” extension, WordPerfect should start and automatically load the document. (It will probably briefly flash a message that it is converting the document.) This means your computer is ready to open FlexDraft documents in the WP/5.1 file format.

If your computer does not properly recognize the “.WP” extension, it will probably display a window similar to the following:



Solution: If you encounter this problem:

- Select “**Select the program from a list**”, then click **OK**. A second window should be displayed, containing a list of all the programs installed on your computer.
- Locate and highlight WordPerfect – whichever version you have installed.
- Optionally type a description to use for “.wp” files
- Check the box “Always use the selected program to open this kind of file.” At this point, the second window should look like the following:



- Click **OK**. Your computer should immediately open the file in WordPerfect. From now on, your computer should recognize “.wp” files and open them in WordPerfect, no questions asked.

Explanation (if you’re interested): When FlexDraft creates a WordPerfect document in the WP/5.1 file format—

- it uses the WordPerfect for DOS 5.1 format (yes, a very old format, but still recognized as a “standard” document format); and
- it uses the standard extension for WP/DOS 5.1 documents: “.WP”

If you use an older version of WordPerfect or your computer has previously used the “.WP” extension for [old] WordPerfect documents, it should immediately recognize the documents created by *FlexDraft* and automatically open them with WordPerfect. However, if:

- you have a more recent version of WordPerfect, and
- your computer has not previously used the “.WP” extension for [old] WordPerfect documents, then

your computer might not know that *FlexDraft*’s “.wp” documents are WordPerfect documents and it won’t automatically open them with WordPerfect unless and until you apply the solution (above).

7.03 WordPerfect Users: Always “Generate” Before Printing

(A) Background

- *FlexDraft* makes extensive use of cross references. Obviously, it is essential that all cross references be accurate.
- When *FlexDraft* sends a document to WordPerfect with “Active Code” paragraph numbering, all cross references to a specific Article or Section number are made using WordPerfect’s “cross reference codes.” Cross reference codes contain a coded reference to the appropriate paragraph. Although they do not actually contain the number of the referenced paragraph, they display that number. Combining *FlexDraft*’s Active Code paragraph numbering with WordPerfect’s cross reference codes means paragraph numbering and cross references will always be accurate no matter how many insertions, deletions or moves you may make as a part of any custom drafting—but only if you update your cross references with the “Generate” command. **If you don’t “Generate” before printing, it is probable that one or more cross-references will be inaccurate.**

(B) How to “Generate”

- As noted in the Getting Started Manual, you should get into the habit of always “Generating” your WordPerfect documents before printing. You can Generate with <Ctrl-F9>, or from the WordPerfect menu with **Tools - Reference - Generate**. I added a “Generate” button to my toolbar to make it even easier. (WordPerfect Help explains how to add a toolbar button.)

Note: It is essential that you “Generate” to ensure that all cross references are accurate; otherwise, your documents could have fundamental flaws and ambiguities.

8. Microsoft Word and FlexDraft

Note: This part of this manual is relevant only if you’ll be using Microsoft Word as your *FlexDraft* word processor. If you’ll be using WordPerfect, refer instead to part 7, “WordPerfect and *FlexDraft*,” at page 29 of this manual, or, if you already have, you can skip to part 9 at page 43 of this manual.

One of the nice things about *FlexDraft* is its independence: Because it is a stand-alone program (as opposed to a program add-in to a specific word processor), *FlexDraft* can be used with WordPerfect (all versions through to X4) and Microsoft Word (versions 97 through to Vista) (and, in theory, with any other word processor; however, only WordPerfect and Word have been tested; the word processor simply needs to be able to import/convert documents in either the WordPerfect format - 5.1 DOS or WP/6.0 - or the “RTF” format).

8.01 Word vs. WordPerfect

So which word processor should you use? **You should use the one you already use & prefer.**

But if you already use both, and you have no preference for one over the other, which should you use? ***I have no idea.***

Up until 3 years ago (when I released *FlexDraft* v. 2008.01) I generally recommend WordPerfect over Word for use with *FlexDraft*. *FlexDraft* was originally designed to work exclusively with WordPerfect and even after I added support for Word, *FlexDraft* always seemed to have fewer complications with WordPerfect than with Word.

However, within the last 3 years each version of WordPerfect seemed to create new complications. Adding support for the WP/6.0 file format eliminated most of those complications (but also created a few others). *As of today* WordPerfect is still probably “better” in that it facilitates more formatting control from within *FlexDraft*. On the other hand, Word “power users” can achieve comparable results with Word Styles (especially when styles are associated with auto-numbering outline levels) and macros. Moreover, I expect that, over time, WordPerfect will become more and more anachronistic, such that *as of tomorrow*, Word may well completely eclipse WordPerfect.

That said . . .

If you are more comfortable with Word, you should use Word with *FlexDraft*. It’s possible, albeit unlikely, that your installation of Word doesn’t have the “Text Converter” (a/k/a “filter”) for “RTF” (and WordPerfect) installed, in which case Word will fail to open documents generated by *FlexDraft*; however, that’s an easy problem to solve. (See part 10.04, “Installing the RTF and WordPerfect Text Converters If Word Can’t Open *FlexDraft* Documents”, at page 46 of this manual.)

There are also a few formatting limitations you’ll need to get used to because, in many circumstances, Word won’t let *FlexDraft* (or any other program) tell it how to format a document. For example, Word doesn’t let *FlexDraft* dictate base fonts or paragraph numbering formats. However, Word does an excellent job of quickly setting the base font and paragraph numbering format to any style you prefer. And as noted above, a Word power user (skilled at using “styles”) has greater *FlexDraft* formatting flexibility than is possible with WordPerfect. Even users who are anything but “Power Users” of Word can take control of Word’s numbering and formatting of their *FlexDraft* documents by importing one of *FlexDraft*’s numbering “Schemes” (see part 8.02, “Import an Existing Numbering Scheme”, at page 35 of this manual).

Note: It is *essential* that you install the RTF (and WordPerfect) Text Converters for Word; otherwise, Word will not be able to import the documents assembled by *FlexDraft*.

8.02 Import an Existing Numbering Scheme

The following steps are *very* detailed. They are designed for the typical *FlexDraft* customer, i.e., someone who is *not* a Word “Power User.” If you follow them *exactly*, you should have no trouble at all. (To those *FlexDraft* customers who *are* power users, if these instructions insult your intelligence, please accept my apologies.)

Notes:

Print Instructions Before Proceeding. *I recommend that you print this part of this manual before proceeding, so that you have uninterrupted access to the instructions as you select text, execute commands and scroll up and down.*

Word / Windows Versions: *The rest of this part contains parallel instructions for different software versions; be sure and use the instructions that are appropriate to your situation—*

Word XP & 2003. *One group of instructions is for Word XP & Word 2003 (which still seem to be very popular among business & legal users).*

Word 2007 & 2010. *The other group is for Word 2007. I’m told that the interface for Word 2010 is the same as Word 2007 but I haven’t tested Word 2010 personally; therefore, if you use Word 2010, some aspects of the instructions might be inaccurate.*

Windows XP. *All of the instructions generally presume that you are using Windows XP. If you’re using Windows Vista or Windows 7 you’ll have to extrapolate now and then.*

Warning – Tinkering with Word numbering schemes: *In Word, whenever you import an outline numbering scheme (or make any changes whatsoever to an outline numbering scheme) it might update the selected “gallery position” of the imported scheme or it might save the imported scheme in a different gallery position, overwriting the existing scheme for that gallery position. If this happens and the overwritten scheme is one you use, you may have to recreate the scheme (or import it from any existing document that uses the scheme).*

(A) Select a Scheme

Before you import a numbering scheme you have to decide which one you want to import. To do that—

- Locate the directory containing the Word numbering schemes. The easiest way to do that is from the Start menu:
 - Click **Start** then select **Programs** (or **All Programs**).
 - Then Select **FlexDraft - Resource Folder - Word Numbering Schemes**.
- If that doesn’t work, you can browse to the folder via Windows Explorer; it’s

C:\FlexDraft\Document\Resource\Schemes

- Review the documents in the Schemes directory until you find one that contains (or come closest to) your preferred format for Wills and trusts.

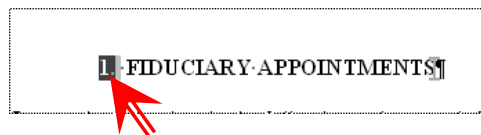
Note: *If the Scheme needs modification in order to suit your preferences, you should revise the scheme **before** you import it. See part 10.01, “Manually Create or Modify Your Own Numbering Scheme in Word” at page 44 of this manual.*

(B) Import a Scheme – Step by Step Instructions – Word XP & 2003

When you’ve selected a particular Scheme, follow the instructions below to import it into Word XP or Word 2003. (Instructions for Word 2007 & 2010 are in part 8.02(D) at page 38 of this manual.)

Note: *You only have to import the Scheme **once** but you have to import the Scheme on **each PC** that will use Word for FlexDraft documents.*

- Open the numbering Scheme document you desire to import and locate the first Article heading.
- Highlight the “**1.**” in the first Article heading of the Scheme, “1. FIDUCIARY APPOINTMENTS”, (highlight the digit “1” *and the period after it*). To do this:
 - Use [Ctrl-Up-Arrow](#) / [Ctrl-Down-Arrow](#) to move the cursor through the document paragraph by paragraph, until it highlights the “1” and the following period. *Or,*
 - Left-click in between the “1” and the period after it.



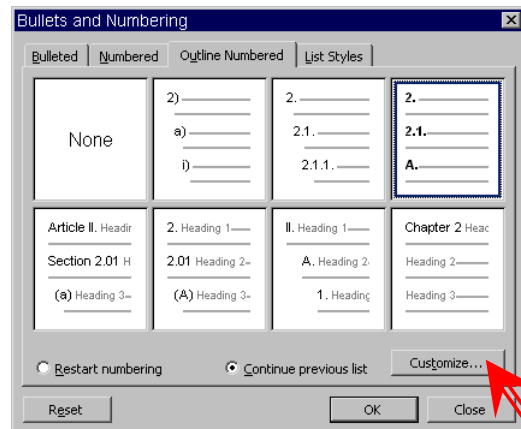
(Note that this is a *crucial, initial step* whenever you’re importing a numbering scheme or applying a numbering scheme to a new document: When you select the first number of the first main heading it tells Word that *this numbering* – beginning at *this point* – is the focus of your action. It ensures that Word will import or apply the correct numbering – starting with # “1”, applying from Article 1 forward, including all levels of numbered paragraphs, & excluding all paragraphs that aren’t already numbered.)

- Open the [Bullets and Numbering](#) dialog box. There are 2 ways to do this. **Either**—
 - Right-click the highlighted “**1.**” and select [Bullets and Numbering](#) from the pull down menu.**Or**—
 - From the Word menu bar select [Format](#) - [Bullets and Numbering](#) ...
- Select the correct numbering option:
 - The [Outline Numbered](#) tab should be displayed. If it isn’t, left-click it.
 - The highlighted numbering option should match the numbering in the numbering Scheme document. If a different numbering option is highlighted, left-click the correct numbering option.
 - In the following screen shot, the numbering option in position 4 (top row, far right) is selected. *However:*

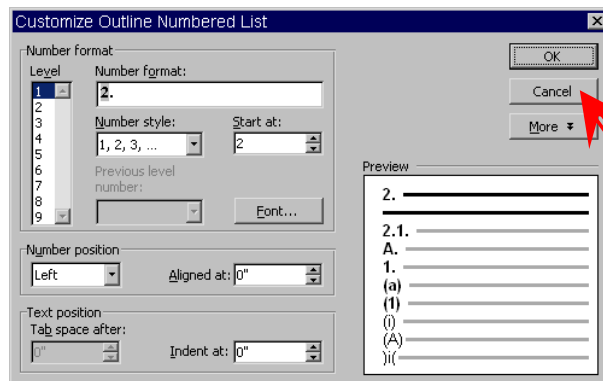
The actual position of the selected numbering option is irrelevant. It could be any one of the 7 valid positions (position 1 is always “None”).

*All that matters is that the numbering in the selected option match the numbering in the Scheme you're importing **and** that the selected option does not include any "Heading..." references. (Options with "Heading..." references include numbering formats plus automatic heading "styles" for all numbered paragraphs.)*

- Left-click **Customize**. The **Customize Outline Numbered List** dialog box will open.



- *Immediately* left-click **Cancel**. You'll go back to the **Bullets and Numbering** dialog box.



Note: Although it will appear as if you've done nothing, *the preceding steps trick Word to "import" the selected numbering option*. As a result, the selected numbering option is converted from a "document-specific" option –available to only the current document – into a general option – available to all documents, including FlexDraft documents.

- *Before continuing:*
 - Locate the numbering scheme you just imported.
 - Don't worry about its Gallery position (its row & column position); that may change from time to time. Instead—
 - Study the numbering scheme's appearance and be sure you can distinguish it from the others.
 - Left-click **OK**. The **Bullets and Numbering** dialog box will close.
- **Congratulations! The numbering Scheme has been imported:** It's no longer merely a part of the numbering Scheme document; it's now a part of the Word program on your

PC. From now on, whenever you open the [Bullets and Numbering](#) dialog box from *any* document, the imported numbering Scheme will be one of the available numbering options.

(C) Apply a Scheme to a New Document – Word XP & 2003

Note: You'll be able to actually apply the Scheme to a new document when you take the tutorial (and you actually draft a new FlexDraft document). But for future reference . . .

Once you've imported a numbering Scheme into Word XP or Word 2003, *it takes only 4 mouse clicks to apply the Scheme to a new FlexDraft document that you've opened in Word:*

1. Right-click the "1." in the *first* Article heading.
2. Left-click [Bullets and Numbering ...](#) on the pull down menu. The [Bullets and Numbering](#) dialog box will open.
3. Left-click the numbering Scheme you imported.
4. Left-click **OK**.

The instant after the 4th mouse-click, Word will automatically reformat the numbering throughout the entire document to match the imported numbering Scheme.

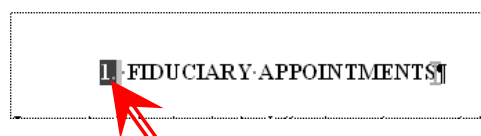
Note: If your version of Word has the point size problem discussed below, you should fix the document's point size **before you apply the numbering Scheme**. See part 10.03 at page 46 of this manual.

(D) Import a Scheme – Step by Step Instructions – Word 2007 & 2010

When you've selected a particular Scheme, follow the instructions below to import it into Word 2007. (I'm told the procedure is essentially the same in Word 2010):

Note: You only have to import the Scheme **once** but you have to import the Scheme on **each PC** that will use Word for FlexDraft documents.

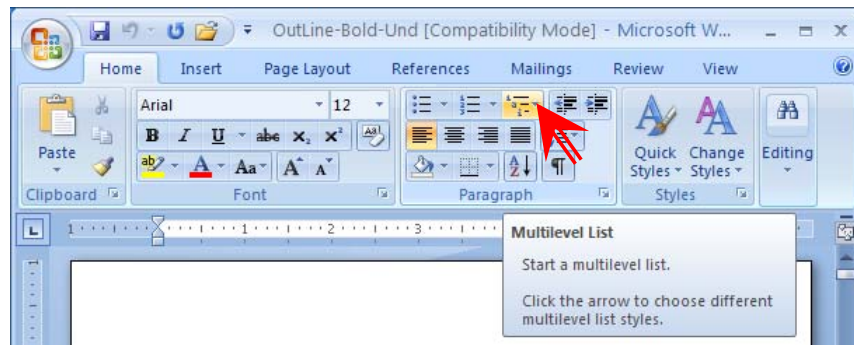
- Open the numbering Scheme document you desire to import and locate the first Article heading.
- Highlight the "1." in the first Article heading of the Scheme, "1. FIDUCIARY APPOINTMENTS", (highlight the digit "1" *and the period after it*). To do this:
 - Use [Ctrl-Up-Arrow](#) / [Ctrl-Down-Arrow](#) to move the cursor through the document paragraph by paragraph, until it highlights the "1" and the following period. *Or,*
 - Left-click in between the "1" and the period after it.



(Note that this is a *crucial, initial step* whenever you're importing a numbering scheme or applying a numbering scheme to a new document: When you select

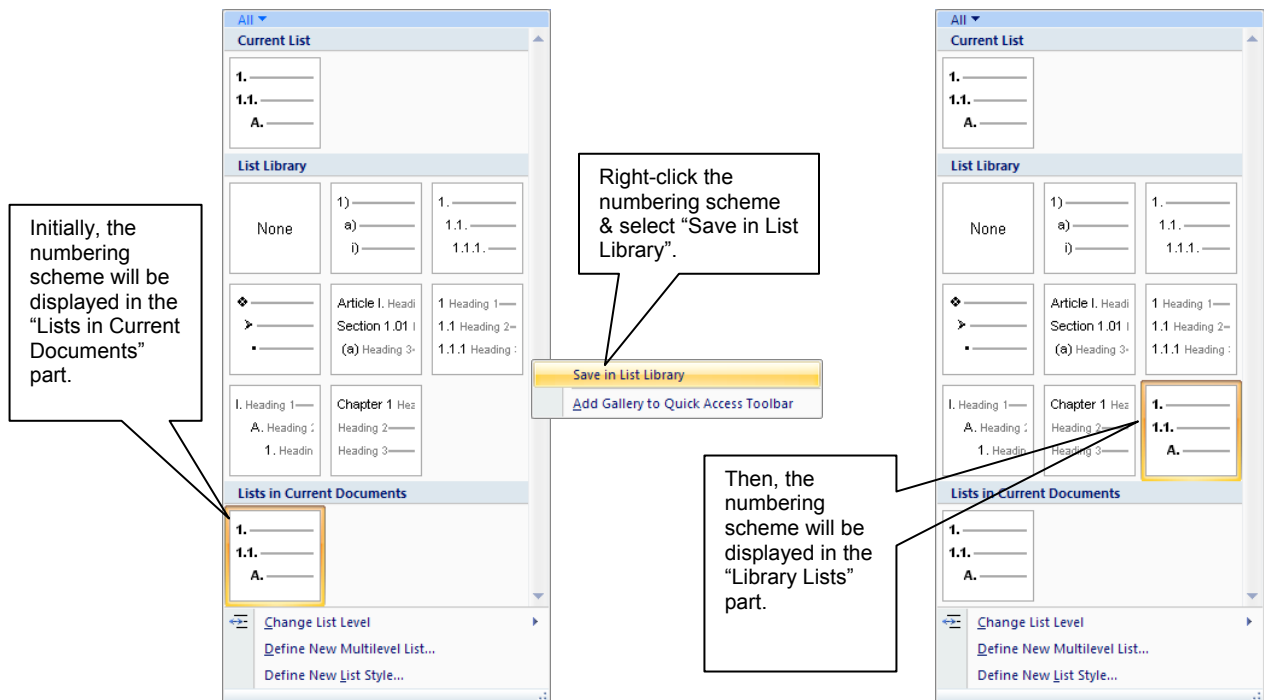
the first number of the first main heading it tells Word that *this numbering* – beginning at *this point* – is the focus of your action. It ensures that Word will import or apply the correct numbering – starting with # “1”, applying from Article 1 forward, including all levels of numbered paragraphs, & excluding all paragraphs that aren’t already numbered.)

- Open the **Multi-level Lists** pane. To do this:
 - Be sure Word’s **Home** command tab is open, then left-click the **Multi-level Lists** button (this is generally immediately to the right of the **Numbering** button):



- The **Multilevel List** pane will open; it should have 3 parts: **Current List**, **List Library** & **Lists in Current Document**. If it only shows one of the parts, left-click the “▼” at the very top of the pane and then select “All” from the pull down menu.
- Open the **Multi-level Lists** pane. To do this:
 - Be sure Word’s **Home** command tab is open, then left-click the **Multi-level Lists** button (this is generally immediately to the right of the **Numbering** button):
 - The **Multilevel List** pane will open; it should have 3 parts: **Current List**, **List Library** & **Lists in Current Document**. If it only shows one of the parts, left-click the “▼” at the very top of the pane and then select “All” from the pull down menu.
 - Locate the icon for this document’s numbering Scheme under **Lists in Current Document** at the bottom of the **Multilevel List** pane. (Note: You need this icon – at the bottom of the pane – for the import to work properly; do not use the duplicate icon at the top of the pane under “Current List”.)

- Without clicking, point to this document's numbering Scheme icon; an expanded icon will pop up.



- Right-click the numbering Scheme icon and select **Save in List Library** from the popup menu.
- *Optional:* If you want to access the numbering Scheme from Word's **Quick Access Toolbar**, Re-open the **Multi-level Lists** pane & right-click this document's numbering Scheme icon again but this time select **Add Gallery to Quick Access Toolbar**.

Congratulations! The numbering Scheme has been imported: It's no longer merely a part of the numbering Scheme document; it's now a part of the Word program's "**List Library**" on your PC. From now on, whenever you open the **Multilevel List** pane from *any* document, the imported numbering Scheme will be one of the "Gallery" (numbering) options in the **List Library** for Multilevel Lists.

Before continuing:

- Open the **Multi-level Lists** pane again and look in the **List Library** part to locate the numbering Scheme you just imported.
- Don't worry about its Gallery position (its row & column position); that may change from time to time. Instead—
- Study the numbering Scheme's appearance and be sure you can distinguish it from the others.
- Click <Escape> to close the pane when you're done.

(E) Apply a Scheme to a New Document – Word 2007 & 2010

Note: You'll be able to actually apply the Scheme to a new document when you take the tutorial (and you actually draft a new FlexDraft document). But for future reference . . .

Once you've imported a numbering Scheme into Word 2007, *it takes only 3 mouse clicks to apply the Scheme to a new FlexDraft document that you've opened in Word (& I'm pretty sure the steps are the same for Word 2010):*

1. Left-click the "1." in the *first* Article heading to highlight it.
2. left-click the [Multi-level Lists](#) button to open the [Multi-level Lists](#) pane.
3. Left-click the numbering Scheme (which will be in the [List Library](#) part of the pane).

The instant after the 3rd mouse-click, Word will automatically reformat the numbering throughout the entire document to match the imported numbering Scheme.

*Note: If your version of Word has the point size problem discussed below, you should fix the document's point size **before you apply the numbering Scheme**. See part 10.03 at page 46 of this manual.*

8.03 Updating Cross References

(A) Set Your Word Options to Automatically Update Cross References Upon Printing

FlexDraft makes extensive use of cross references. Obviously, it is essential that all cross references be accurate.

FlexDraft facilitates accurate cross references by using Word's "field codes" instead of actual numbers for all cross references to a specific numbered Article, Section or Subsection. Field Codes display the number of the referenced provision but what they contain is a coded cross reference code that links to the appropriate paragraph. This means that cross references will always be accurate no matter how many insertions, deletions or moves you may make as a part of any custom drafting—but *only if you update your cross references*. **If you don't update cross references, it is probable that one or more cross-references will be inaccurate.**

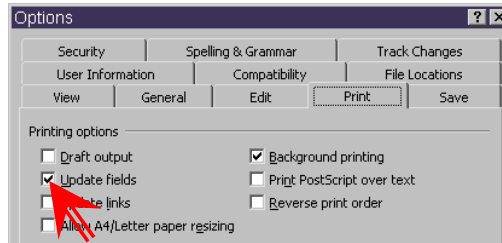
Fortunately, you can set your Options to have Word automatically update all cross references whenever you print a document by performing the following steps (*you really ought to do this*):

(B) Activate Automatic Updating – Word XP & 2003

Here's how to activate automatic updating of cross references upon printing in Word XP and Word 2003:

- While you are in Word, select [Tools](#) from the main menu, click [Options](#), and then select the [Print](#) tab.

- Under **Printing options**, select the **Update fields** check box and then click **OK**.



From then on, Word will automatically update your cross references every time you print.

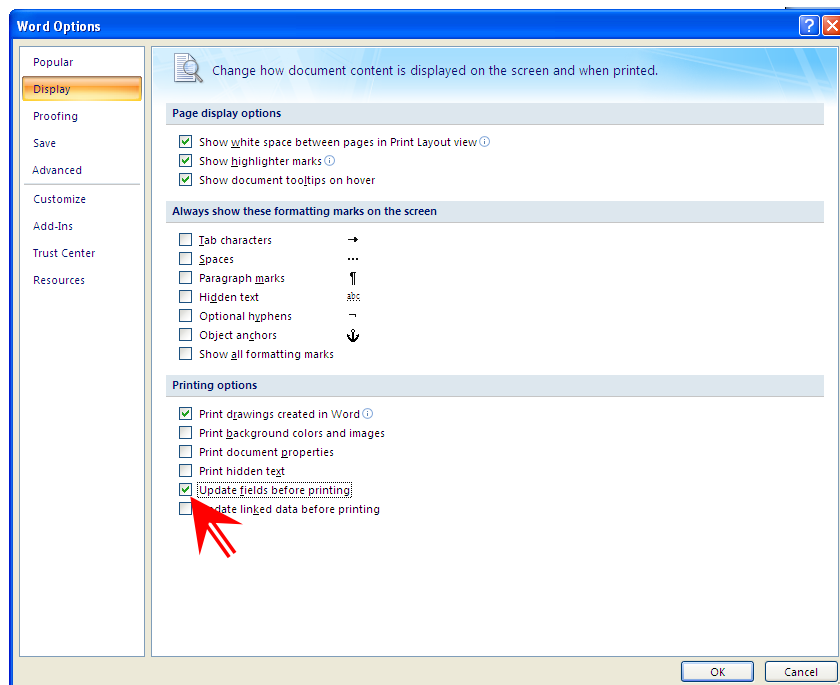
(C) Activate Automatic Updating – Word 2007 & 2010

Here's how to activate automatic updating of cross references upon printing in Word 2007. (I'm told the procedure is essentially the same in Word 2010):

- While you are in Word, click the **Office button** in the upper left corner of the Word program window.



- A popup window will open; click the **Word Options** button in bottom of the popup window.
- The **Word Options** window will open. Select the **Display** tab on the left side of the window; check the box for **Update fields before printing** (beneath **Printing options**); then click **OK**.



(D) Manual Update – All Word Versions

You can manually update cross references in Word at any time by performing the following steps:

- While you are in Word with a *FlexDraft* document open, highlight (or “select”) “all” of the document with **<Ctrl-A>**.
- Right-click anywhere in the highlighted document; then select “**Update Field**” from the menu. All cross references will be updated.

Note: It is essential that you “update fields”, either manually or automatically, to ensure that all cross references are accurate; otherwise, your documents could have fundamental flaws and ambiguities.

8.04 Formatting Limitations: Paragraph Numbering & Automatic Table of Contents are Controlled in Word not FlexDraft

FlexDraft documents that are sent to Word (i) have limited formatting options for automatic paragraph numbering and (ii) will not generate automatic tables of contents.

However, FlexDraft documents in Word, have just as much flexibility and have just as many formatting options as any other documents in Word. Specifically:

- You can modify the format of automatic paragraph numbers in FlexDraft documents to the same extent as in any other documents.
- If you use true headings in FlexDraft and you use style codes in Word, you can automatically generate a table of contents.

Also, when FlexDraft applies character formatting to Article and Section headings, Word applies those formats to the text of each heading but not to the automatic numbering codes at the beginning of each heading. However, you can keep the heading number and heading text formatted the same by using Word’s Bullets and Numbering option to “customize” the font of your paragraph numbering from level 1 to level 5. (The FlexDraft Tutorial shows you how to do this.) And again, if you use Word styles, you have even greater formatting control.

The bottom line: Just be aware that, if you plan on using Word, certain formatting options normally handled internally by FlexDraft must instead be handled by you in Word.

9. Now, Take the Tutorial!

When you finish the above, you are ready to really learn how to use FlexDraft. FlexDraft is an intuitive, easy to use program; however, all computer programs can be difficult to use the first time. Therefore, **I strongly recommend that you take the FlexDraft Tutorial before you begin preparing actual client documents.** It will walk you through the preparation of a Will and ancillary documents from beginning to end and, when you’re done, you should be sufficiently comfortable with FlexDraft to start using it as it was intended: to prepare quality, customized estate planning documents for your clients.

**[END OF GETTING STARTED MANUAL CONTENT;
APPENDICES FOLLOW]**

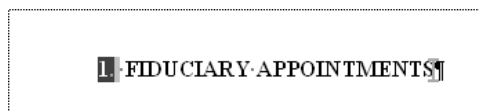
10. Appendices

10.01 Manually Create or Modify Your Own Numbering Scheme in Word XP or 2003

If you don't like any of the existing numbering Schemes (or you want to modify one of the existing Schemes), the instructions in this part should enable you to create and/or modify a numbering Scheme to your liking. The following instructions assume that you prefer "standard" numbering.

Note: Word "power users" should have no trouble at all creating and/or modifying numbering Schemes. However, if you're not familiar with Word's advanced features, you might want to find a power user to help you before you attempt the following.

- First, go to the very beginning of Ward's Will (the one you drafted pursuant to this Tutorial), point to and then Right-Click on the paragraph number at the beginning of the following line (you'll know you're pointing to it when the cursor turns into an arrow):



- Select **Bullets and Numbering** from the menu. The **Bullets and Numbering** dialog box will appear.
- Click on the tab titled "**Outline Numbering**." There should be 8 sample numbering schemes displayed; one of them should be highlighted (selected) and it should look like the numbering in Ward's Will, e.g.:

```

1 .....
.....
1.1 .....
.....
A .....
.....

```

- Be sure the correct numbering scheme is highlighted, then click **Customize**. The "**Customize Outline Numbered List**" dialog box should appear.
- On the right side of the "**Customize Outline Numbered List**" dialog box there should be a button marked "**More**." Click the **More** button (the dialog box should get larger and the **More** button should turn into a **Less** button. If the "**Less**" button is already displayed you can skip this step.)
- On the upper left side of the dialog box, there should be tall, narrow field labeled "Level"; level "1" should be highlighted. (If it's not, click on the number "1.") At this point you are ready to format heading numbers.

(A) Setting Bold Formatting

If you want heading numbers to be bold faced, perform the following steps:

- Click on the **Font** button; a “Font” dialog box should appear.
- Click “**Bold**” under the field labeled “Font Style”; then click **OK** to return to the “Customize Outline Numbered List” dialog box.
- In the Level field (tall narrow field on upper left) click on level “2” and repeat the above steps to specify that level 2 numbers are bold; then repeat again for level 3 and level 4. (Do not specify bold for any additional levels.)
- Click **OK**.

(B) Adding Periods After Numbers

- Get back to the “Customize Outline Numbered List” dialog box and highlight Level “1”. Then click in the “number format” field; be sure the cursor is to the right of the number “1” and then type a single period (“.”) after the number. When you’re done, “1.” should be displayed in the number format field.
- Then, click on Level “2” in the Level field and click back in the number format field, and insert a period after the “1.1” that should be displayed. When you’re done, “1.1.” should be displayed in the number format field.
- Then, click on Level “3” in the Level field and click back in the number format field, and insert a period after the “A” that should be displayed. When you’re done, “A.” should be displayed in the number format field.
- Finally, click on Level “4” in the Level field and click back in the number format field, and insert a period after the “1” that should be displayed. When you’re done, “1.” should be displayed in the number format field.
- Click **OK**.

(C) Ensuring Proper Spacing After Numbers

- Get back to the “Customize Outline Numbered List” window and highlight Level “1”. Verify all the following for level 1 numbering:
 - “**Number position**” should be “**Left**”
 - “**Aligned at**” should be “**0**” (zero inches).
 - In “Text position,” “**Indent at**” should be “**0**” (zero inches).
 - “**Link level to style**” should indicate “(no style)”
 - “**Follow number with**” should indicate “**Nothing**” (or, if you want more space after Article numbers, select “**Space**” instead)
 - “**Legal style Numbering**” should *not* be checked.
- Repeat the above for Levels 2, 3 and 4.
- Be sure “**Apply changes to:**” indicates “**Whole List**”

- Then Click **OK**.

10.02 Apply a Manually Created/Modified Scheme to a New Document

Manually created or modified Schemes behave the same as the standard Schemes, and are applied to new documents in the same manner as the standard Schemes. See Subpart 8.02(E), “Apply a Scheme to a New Document – Word 2007 & 2010”, at page 41 of this manual.

10.03 If Word Sets FlexDraft Documents To 10 Point Font Size

The Problem: When an older version of Word (Word XP, or any earlier version of Word, such as Word 2000) opens a *FlexDraft* document, it might format the entire document in 10 point type size, even if this is not your default font size. (This quirk was fixed in Word 2003.)

The Solution: *If your version of Word does this, you can use the following procedure to get things back to normal.*

- Use **Ctrl-A** to select (highlight) the entire document. (If **Ctrl-A** doesn’t work, from the Word main menu select **E**dit - **S**elect **A**ll.)
- Right-click anywhere in the document and select **F**ont... from the pull down menu.
- Be sure that your desired “default” font size is indicated.
(Most people use 12 point for Roman typefaces and 11 point for Arial and other “modern” sans serif typefaces.)
- If it’s not, pick your desired font size from the list, and then left-click **OK**.
- Then continue with the steps indicated above.

10.04 Installing the RTF and WordPerfect Text Converters If Word Can’t Open FlexDraft Documents

If **and only if** Word is unable to open documents with the “.RTF” extension, you’ll need to install the RTF text converter. The test is simple:

- Click **Start** on the start menu.
- Select **Programs** (or **All Programs**).
- Select the **FlexDraft** Program Group.
- Click on **Sample Will-Word(RTF)**.

If the file opens in Word, it means the RTF converter is already installed and you can ignore the rest of this discussion. If Word is installed on your computer but it’s unable to open the sample

Will, then your installation of Word may not include the RTF converter, and you'll need to install that converter before you can use Word with *FlexDraft*.

To install the RTF and WordPerfect Text Converters for your copy of Microsoft Word, **first, be sure you have your Word (or MS Office) CD; you'll need it to complete the installation.** Then, proceed more or less as follows – *I say “more or less” because the following steps vary depending on which version of Word and which version of Windows you have:*

- Click **Start**, then select **Settings** and click **Control Panel**.
- At the Control Panel window, double-click **Add/Remove Programs**. After the window opens (which might take a while), be sure the **Change or Remove Programs** tab is selected (if there's no tab by that name, it might be named **Install** instead).
- You should be looking at a list of the programs that are installed on your computer.
- Scroll down the list of programs and highlight then entry for your version of **Microsoft Word** (or **Microsoft Office**, if you have installed the entire Office Suite).
- Then click **Change** (or possibly **Change/Remove** or **Add/Remove**).
- Note: At this point, if you haven't done so already, go ahead and insert your Word (or Office) CD into your CD-ROM Drive.
- At the next screen, click **Add or Remove Features**.
- In the next screen, one of the last items listed should be **Converters and Filters**. Click the plus sign (+) next to it. When the list expands, click **Text Converters**.
- Click the icon for **RTF Converter** (it may display instead as **Word 97-2000 & 6.0/95 RTF Converter**) and select **Run from My Computer** from the pull down menu.
- If you can find it, click the icon for **WordPerfect 6.x Converter** and select **Run from My Computer** from the pull down menu.
- Likewise, if you can find it, click the icon for **WordPerfect 5.x Converter** and select **Run from My Computer** from the pull down menu.
- Click the **Update Now** button. After a moment, a window should appear confirming that the update was successful. Click **OK**.
- When the **Add/Remove Programs** window returns, close it out (e.g., by clicking the in the upper right hand corner of the window) and then close the **Control Panel** window the same way.

10.05 Setting CAPS User Preferences

CAPS User Preferences are set automatically by the *FlexDraft* setup program for almost all Word and WordPerfect word processor choices. However, if you alter your CAPS User preferences and, afterwards, *FlexDraft* does not run properly, you should refer to this

Appendix. By following the procedures below, it may be possible to repair *FlexDraft* and avoid the need to reinstall it.

Be warned: the following steps are technical and may be difficult to follow for those who are not “power users.”

(A) Specifying your Word Processor Preferences

FlexDraft and CAPS User (a/k/a “WinCaps”) must know which word processor you use. The *FlexDraft* setup program handles this automatically; however, if you ever need to change your word processor preferences, follow these instructions:

- Start *FlexDraft* (or start CAPS User without *FlexDraft*). (See part 4, “Starting *FlexDraft*,” at page 11 of this manual.)
- Click **F**ile on the CAPS User menu (at the upper left of the “CAPS User” window), select **P**references, then click **W**ord Processor.
- The Word Processor Options window will appear. Three fields need to be set.
- **W**ord Processor:
 - Specify the Word Processor you will use with *FlexDraft* in the top field. (Activate the pull down menu for the **W**ord Processor field and select your Word Processor from the list.)

Note: FlexDraft supports all versions of WordPerfect and Microsoft Word although it has only been tested through WordPerfect X/14 and Word 2007. with other word processors. So, even though CAPS User supports several word processors, please stick with WordPerfect or Word.

- **P**athname:
 - CAPS User will *probably* guess the Pathname for your Word Processor and fill it in for you in the Pathname (third) field. (If it can’t guess or if it guesses wrong, you—or your computer tech—can use the Browse button to get the correct Path, but you’ll need to add the correct “switch,” noted below.)

Note: the Path must be specified using 16 bit or “short” file names, i.e., file names that are no longer than 8 characters in length. CAPS User will not accept a Path with “long” (32 bit) file names.

- Certain “switches” or “command line parameters” are mandatory for both Word and WordPerfect. **These switches must appear at the end of the Pathname field. Without the proper switch, *FlexDraft* will not operate properly with your word processor.** The required switches are as follows:

- WordPerfect 6.1 and all later versions:
 /ddeex
- Word 97 (version 8) and Word 2000 (version 9):
 /n
- Word XP (a/k/a Word 2002, version 10) and later versions:
 /n /dde

If a required switch is missing, you should manually add it to the end of the Pathname field (leave one blank space before the switch).

- **Export File Format:**

- After setting Word Processor and Pathname, set Export File Format (the middle field) using the pull down menu. **Important:**
 - **If you are using any version of WordPerfect, you must specify WordPerfect 6.0 as the Export File Format.**
 - **If you are using any version of Microsoft Word, you must specify Rich Text Format as the Export File Format.**

Note: when you select your word processor, CAPS User assumes that your export format will be the same. However, FlexDraft is designed to produce all its documents in either WordPerfect 6.0 (a/k/a “WP/6”, & “WP/6 ... X/4”) format or Rich Text Format (“RTF”). These formats are seamlessly imported into all versions of WordPerfect and Word, respectively, and virtually all other word processor programs import the WP/6 format reasonably well. (Note that in some word processors—including Microsoft Word—the WP/6 and RTF conversion utilities are not part of the standard installation and must be specifically installed before available. See part 8, “Microsoft Word and FlexDraft,” at page 33 of this manual.)

- After setting all 3 word processor preference fields, click **OK**.

(B) Specify your Initials

This step is not essential. If you want to, you can provide your initials to FlexDraft and CAPS User, as follows:

- Start FlexDraft (or start CAPS User without FlexDraft). (See part 4, “Starting FlexDraft,” at page 11 of this manual.)
- Click **F**ile on the CAPS User menu (at the upper left of the “CAPS User” window), select **P**references, then click **G**eneral.
- The General Options window will appear.
- **Fill in your initials** in the User Initials field. Click