DPS 8 Answer Editor

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Introduction to DPS 8 Answer Editor

- DPS Answer Editor creates the answers and tips in guides, which are provided with and can be used by DPS 8 with new Clients and Documents.
- The Initial Sceen which appears is:

Answer Editor		-	×
File			
Open New			
	Paragraph Segoe UI	*= *=	>>

• You can create a New Guide or Open an Existing Guide

DPS 8 Answer Editor >

Create New Guide

- To create a new guide for a module, the module must have been created
- Select New then select the document and name the new guide.

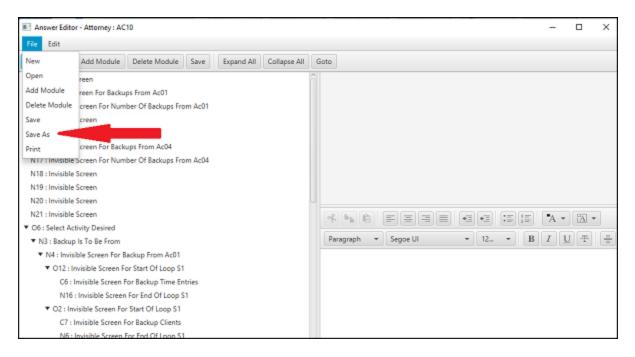
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▶ Employment		5 .5	
▼ Estate Planning		Exit	
EP05 Client Communications Create Client X			
EP10 Diagrams For Client New Will Guide Name			
EP25 Gift Tax Return			
LI03 Irrevocable Trust OK Cancel			
LT03 Miscellaneous Documen			
PR03 Estate Tax Projections			
PW03 Powers Of Attorney			
RE03 Revocable Trust			
SP03 Split Dollar Agreements			
WI03 Will			
Income Taxes			
Ltd. Liability Company			
Probate			

- Modify the answers and tips on the screens as described below
- If a Guide which has similiar answers and Tips exists you can open that Guide and make the necessary changes and Save As as described below

DPS 8 Answer Editor >

Save As

• If you have modified an existing Guide and want to save it as a new Guide, Click on Edit then Save As after you have made all necessary changes



• You can then enter the name of the new Guide. The new Guide will remain open if you want to make additional changes.

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File Ed	lit															_
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	C7 : Inv	isible Screen P	or Backup Clients													
	N6 : Inv	visible Screen F	For End Of Loop S1													

DPS 8 Answer Editor > Create New Guide >

Modify Existing Guide

• To modify an existing Guide, open that Guide. You can show only the Guides for that Document by selecting Filter.

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elect a guide and module to oswer.	All Filter								
Global Tips Guide	 Accounting 	â							
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Married - Contingent Trust Will	Employment								
Married - Marital Trust M/D Will	 Estate Planning 								
Married - Outright Bequest M/D Will	EP05 Client Communications								
Married - Pour Over Will	EP10 Diagrams For Client								
Married - QTIP M/D Will	EP25 Gift Tax Return								
Married - Reverse QTIP Generation Skipping	LI03 Irrevocable Trust								
Married - Simple Will	LT03 Miscellaneous Documents								
Single - Family Trust Will	PR03 Estate Tax Projections						•A •	EAL	¥
Single - Generation Skipping Will	PW03 Powers Of Attorney								_
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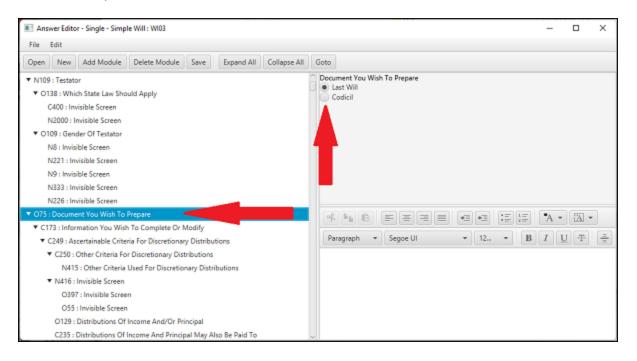
• Modify the answers and tips on the screens as described below and click on Save to save the change you made

Answer Editor - Single - Simple Will: WI03	– 🗆 X
File Edit	
Open New Add Module Delete Module Save Expand All Collapse All	Goto
 ▼ N109 : Testator ♥ O138 : Which State Law Should Apply C400 : Invisible Screen N2000 : Invisible Screen ♥ O109 : Gender Of Testator N8 : Invisible Screen N221 : Invisible Screen 	Imisible Screen Counter For Comma
N9 : Invisible Screen N333 : Invisible Screen N226 : Invisible Screen ♥ O75 : Document You Wish To Prepare ♥ C173 : Information You Wish To Complete Or Modify ♥ C249 : Ascertainable Criteria For Discretionary Distributions ♥ C250 : Other Criteria For Discretionary Distributions	• • </td
N415 : Other Criteria Used For Discretionary Distributions N416 : Invisible Screen O397 : Invisible Screen O55 : Invisible Screen O129 : Distributions Of Income And/Or Principal C235 : Distributions Of Income And Principal May Also Be Paid To 	

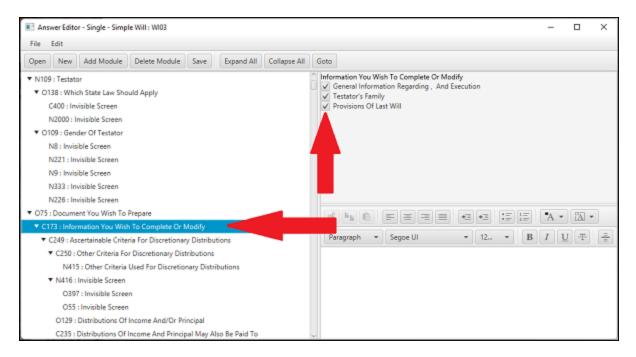
DPS 8 Answer Editor >

Modify Answers on a Screen

- Modify the default answers on a screen by selecting that screen then making the appropriate changes to the answers.
 - Here is an Option Button screen:



• Here is a Check Box screen:



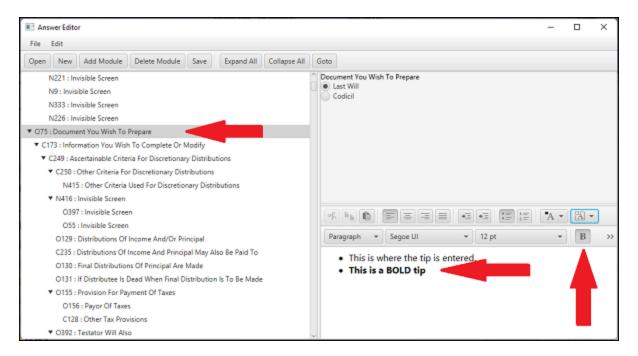
• Here is a Name Entry screen:

Answer Editor - Single - Simple Will : WI03	– 🗆 X
File Edit	
Open New Add Module Delete Module Save Expand All Collapse All	Goto
 N109 : Testator O138 : Which State Law Should Apply C400 : Invisible Screen N2000 : Invisible Screen O109 : Gender Of Testator N8 : Invisible Screen N221 : Invisible Screen N333 : Invisible Screen N226 : Invisible Screen O75 : Document You Wish To Prepare O75 : Document You Wish To Prepare C173 : Information You Wish To Prepare C173 : Information You Wish To Complete Dr Modify C249 : Ascertainable Criteria For Discretionary Distributions C250 : Other Criteria For Discretionary Distributions N416 : Invisible Screen 0397 : Invisible Screen O297 : Invisible Screen O235 : Invisible Screen O235 : Invisible Screen O235 : Invisible Screen O235 : Invisible Screen 	Other Criteria Used For Discretionary Distributions Other Criteria # 1 Other Criteria # 2 Other Criteria # 3 Other Criteria # 3 Other Criteria # 4 Other Criteria # 5

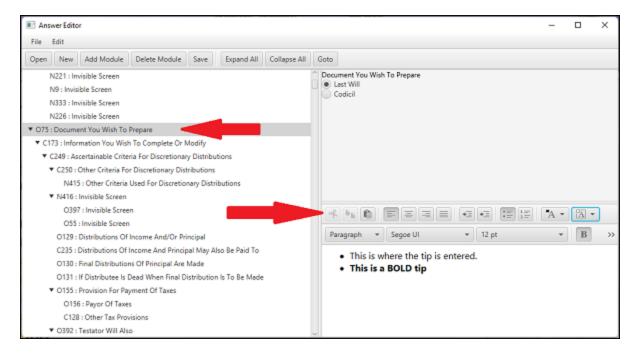
DPS 8 Answer Editor >

Modify Tips on a Screen

• Modify the Tips on a screen by selecting the appropriate screen then making the changes to the Tips. Here is where the Tips are entered. They can be **BOLD** and the font can be changed.



Tips can be formatted for justification, Indenting, including bullets or numbers, etc.



DPS 8 Answer Editor >

Global Tips Guide

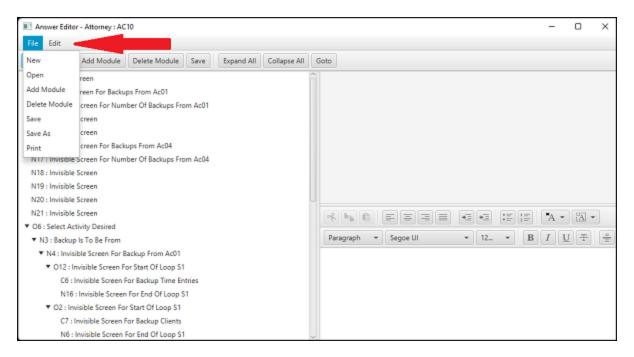
- A Tip that is contained in the Global Tips Guide will appear on the screen in all Clients regardless of the Guide used when the Client was created
- Documents which have Tips which come from the Global Tips Guide, such as Articles Of Incorporation in Corporations, will show as a Guide and can be modified as as described above

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Select a guide and module to answer.	All Filter		
For Profit - Common & Preferred Stock - Cor	 Accounting 		
For Profit - Common Stock - Corporation Arti	Charitable		
Global Tips Guide	▼ Corporations		
Organizational Documents - Common Stock	AR03 Articles Of Incorporation		
	BY03 Bylaws		
	CO01 Client Communications		
	CO50 Securities		
	CO80 Miscellaneous Documents		
	CO85 Your Documents		
	MI03 Minutes		
	Employment		
	Estate Planning		
	Income Taxes		
	Ltd. Liability Company		
	Probate		
	Real Estate		
Select Guide Cancel			
Select Guide Cancel			

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File Dropdown

Click File to access this drop down menu



DPS 8 Answer Editor >

Edit Dropdown

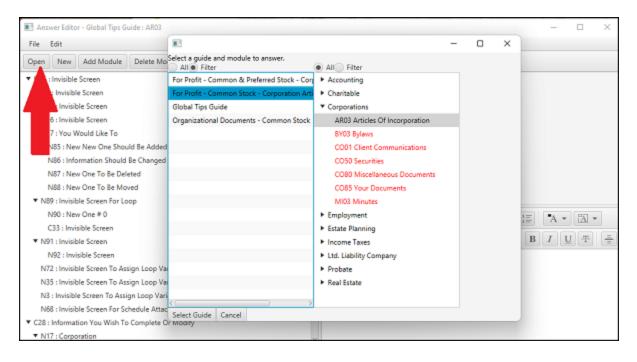
Click Edit to access this drop down menu

Answer Editor - Global Tips Guide : AR03	- 0 X
File Edit	
 N91 : Invisible Screen N92 : Invisible Screen N72 : Invisible Screen To Assign Loop Variables N35 : Invisible Screen To Assign Loop Variables N3 : Invisible Screen To Assign Loop Variables N68 : Invisible Screen For Schedule Attached To Form Articles C28 : Information You Wish To Complete Or Modify N17 : Corporation 	Paragraph - Segoe UI - I2 B I U

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Open

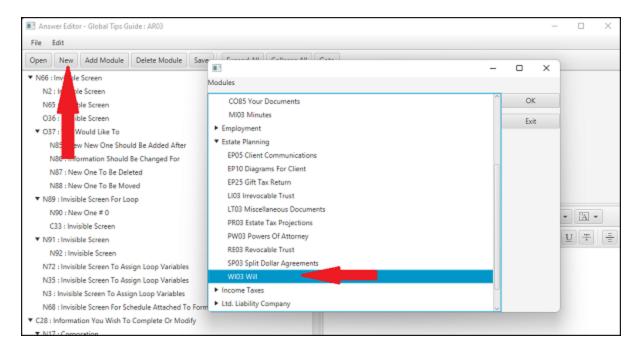
Click here to Open and select a Document



DPS 8 Answer Editor > lcons >

New

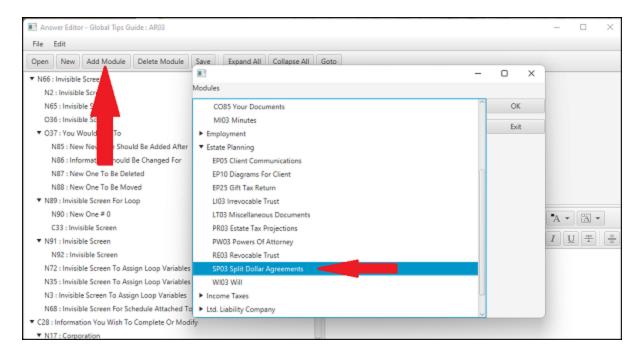
Click here to create a new Guide and select a Document



DPS 8 Answer Editor > lcons >

Add Module

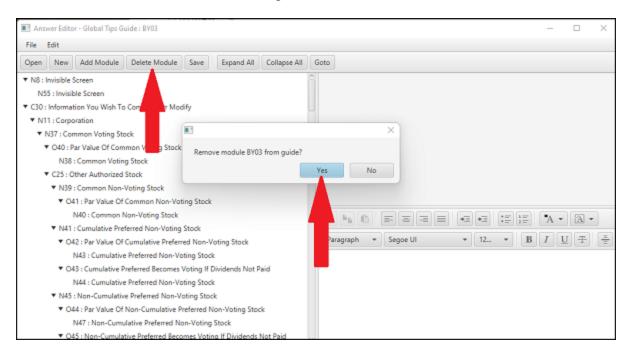
• Click here to Add a Document to the Guide. Thereafter, the Guide will be shown whenever a new Document is being created.



DPS 8 Answer Editor > lcons >

Delete Module

• Click here to Delete the selected Document from the Guide. Thereafter, the Guide will not be shown whenever a new Document is being created.



DPS 8 Answer Editor > lcons >

Save

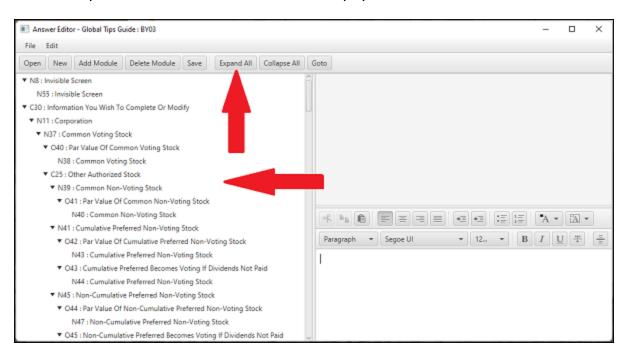
• Click here to Save a Guide after you have made all necessary changes

Answer Editor - Single - Simp File Edit	le Will : WI03					-	×
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Expand All

• Click here to Expand so all screens in the Guide are displayed

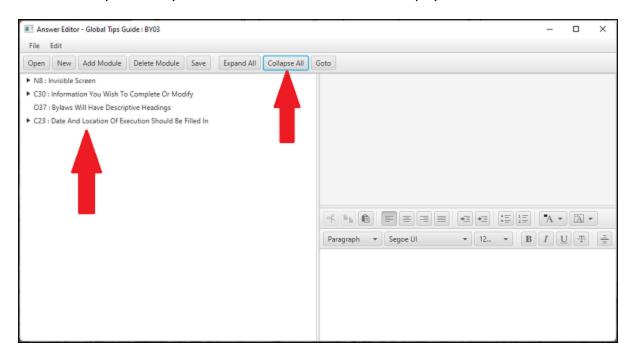


• You can also click on a Parent Screen to Expand or Collapse all of its child screens

DPS 8 Answer Editor > lcons >

Collapse All

• Click here to Collapse so only Level 1 screens in the Guide are displayed:

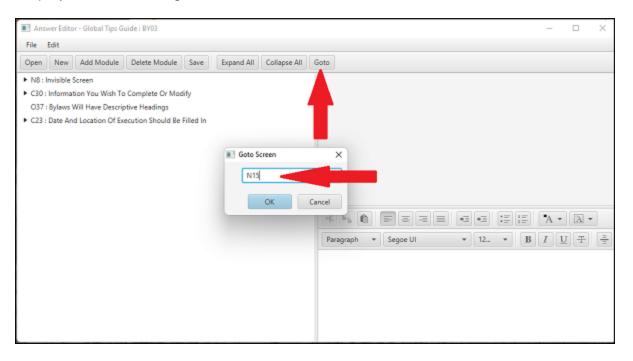


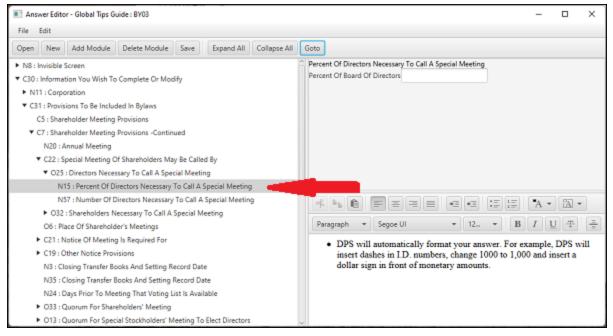
• You can also click on a Parent Screen to Collapse all of its child screens

DPS 8 Answer Editor > lcons >

Goto

• Click here to Goto a specific screen in the Guide. This will also Expand so all screens in the Guide are displayed and the designated screen selected.





DPS 8 Answer Editor > lcons >