

# THE BENEFICIARY BOOK SOFTWARE FOR WINDOWS™

## USER'S GUIDE


### GETTING STARTED...

WHAT TO DO FIRST	WHAT YOU WILL NEED TO COMPLETE THE TASK
<ol style="list-style-type: none"><li>1. Before installing the program, please review and print the User's Guide.</li><li>2. For ready reference, keep the User's Guide in <i>The Beneficiary Book</i> binder.</li><li>3. Please complete and return the attached Registration Form.</li></ol>	<ol style="list-style-type: none"><li>1. Standard 1 to 1 ½ inch - 8 ½ x 11 three-ring binder.</li><li>2. Two (2) sets of five-tab dividers.</li><li>3. Supply of blank, three-hole punched, 8 ½ x 11 paper.</li></ol>



### SUGGESTIONS & TIPS

1. Make the existence and location of the information contained in *The Beneficiary Book* known to those who will have a need to access it.
2. Label your binder, so that it is easily definable.
3. Frequently backup your data on other media as well as your hard drive.
4. Store an up-to-dated copy of your data at an easily accessible off-site location.
5. Always print out your data and all updates and place it in the appropriated sections of your binder.
6. Keep you advisors informed of any information that may be vital to keeping your estate and financial plans current.
7. Provide printouts relating to your final arrangements to those who will have to carry out your final wishes.
8. Remember to check our Web site ([www.active-insights.com](http://www.active-insights.com)) for periodic updates and other information specifically designed to keep you better organized.
9. We welcome your comments and suggestions. If you have any, please send them to Active Insights, PO Box 500028, San Diego, CA 92150 or [info@active-insights.com](mailto:info@active-insights.com).

# SYSTEM REQUIREMENTS AND INSTALLATION INSTRUCTIONS

<b>System Requirements</b>	<ul style="list-style-type: none"> <li>• 100% IBM® compatible 386 or higher PC</li> <li>• Windows™ 3.1, 9x, Me, 2000, or XP</li> <li>• 4Mb. of RAM (8Mb. of RAM recommended)</li> <li>• Hard drive with at least 10 megabytes of free space</li> <li>• Mouse or other pointing device</li> <li>• Any printer supported by Windows™</li> </ul>
<b>How to Install</b>	<p><b>Step 1.</b> Follow the installation instructions on your screen.</p> <p><b>Step 2.</b> <b><u>IMPORTANT! For proper installation, YOU MUST accept “C:\BBOOK” as the default drive and directory.</u></b></p> <p><b>Step 3.</b> At the “User Information” screen, enter “User Name” then click “OK.” (User Name must be at least 4 characters.)</p> <p><b>Step 4.</b> When the installation is completed, click on the  icon and you're ready to begin.</p>

## GETTING THE MOST OUT OF THE BENEFICIARY BOOK SOFTWARE FOR WINDOWS™

	<p>“How To Use The Beneficiary Book” can be found in the Help drop down menu. This file contains Information about the following: 1) Author’s Suggestions, 2) Dealing with Entering Names and Addresses, 3) Getting Around in the Software, 4) Using Tips Effectively, 5) Using the Bookmark Feature, 6) Backing Up the Database, 7) Printing, 8) Economizing the Database. <b>NOTE: The first time you elect to backup your data for The Beneficiary Book Software for Windows™ to your hard drive, a sub-directory: C:\BBOOK\BACKUP will be created.</b></p>
	<p>Whenever you exit the program, a message asking if you would like to “Economize the Database” will appear. Selecting “Yes” will “Pack &amp; Reindex” the database. We recommend that you select “<b>yes</b>” if you have made any additions, deletions or changes to the database. <b>NOTE: See “How To Use The Beneficiary Book” in the “Help” drop down menu for more information.</b></p>


## CREATING RECORDS

<b>Entering Data Into Database Screens</b>	<p>To move between questions in a database screen, use your Mouse, Tab key, or Arrow Keys.</p>
<b>“ADD” “EDIT” “DELETE” Buttons</b>	<p>Use these buttons to “ADD” - “EDIT” or “DELETE” a record. (e.g., “Family Medical History” - Section 1 Page 15 click the “ADD” button to add your spouse or other family member(s).)</p>
<b>Radio Buttons</b>	<p><b>Some questions are formatted with “YES” and “NO” Radio Buttons. If you do not select “YES”, the default for that question will automatically be “NO.”</b></p>


# ENTERING DATA INTO TABLES

(Below is an example of a table.)

Type of Advisor/Contact	Name	Address	City	State	Zip	Telephone
Accountant	John Smith	123 Main	Anywhere	CA	12345	760-555-1212
Banker	Sam Jones	555 Oak	Anywhere	CA	54321	760-555-4321
Dentist	Jim Brown	1 Pine St.	Anywhere	CA	98765	760-555-9876

	<ul style="list-style-type: none"> <li>The heading row that contains the “Field Titles” (Type of Advisor/Contact, Name, Address, etc., cannot be changed.) However, the type of advisor (e.g., Accountant, Banker, Dentist, can be changed or deleted.</li> </ul> <p>To move between fields within a table, use the “Mouse,” “Arrow” or “Tab key”. Use the “Insert” key to add a record and the “CTRL + Delete” to remove a record. <b>NOTE:</b> Because of screen space constraints, all fields may not be visible on the screen at the same time. Use the “Right Arrow” key to view and populate these fields. Also...All of the input fields are “structured.” This means that the data you enter must fit within the allotted space and you should abbreviate when necessary.</p>
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## PRINTING YOUR DATA

	<p>There are three ways to access the Print Menu:</p> <ol style="list-style-type: none"> <li>Click on the Print icon.</li> <li>Press and hold Ctrl key and tap the “P” key.</li> <li>Click “File” at the top of your screen then click on “Print.”</li> </ol>
<p><b>Printing an entire section or more than one section at a time</b></p>	<ol style="list-style-type: none"> <li>Clicking on the box of a section places a “✓” in that box. If you then click on “Print,” the program will print that entire section.</li> <li>To print more than one section at a time, place an “✓” (by clicking on the boxes alongside the sections you want to print). Then click on “Print.”</li> </ol> <p><b>NOTE:</b> Depending upon the length of your answers, some pages may print with only a border at the top, this is due to the white space that is placed above and below each question and answer. The white space makes the reports easier to read. <b>Also note: <u>You cannot print blank sections or pages.</u></b></p>
<p><b>Printing selected sub-sections</b></p>	<p>An ellipsis (“...”) means there are sub-sections that you can select individually. If you click on the ellipses you will see sub-sections related to the main section you selected. After clicking on an ellipsis, place an “X” in the box next to a sub-section you wish to print. Then click on “Print” to print that sub-section.</p>
<p><b>Print Preview</b></p>	<p>To preview a sub-section prior to printing, click on the sub-section you want to preview. A “Box” will appear around the sub-section title. Click on the magnifying glass next to that sub-section you will see a preview of that report with the data that you entered. <b>NOTE:</b> If you click on more than one sub-section, only the sub-section with the box around the title will be previewed. Also...The preview screen is not a “What you see is what you get” (WYSIWYG). It is a close approximation of what the printed page will look like along with the data you entered. For more information, see the “How To Use The Beneficiary Book” in the Help dropdown menu.</p> <p><b>Note: When entering years 2000 and above, the preview screen will display the four-digit date field as “19xx.” (For example: If you entered the year “2004,” the preview screen will display “1904.”) <u>However, the actual date(s) you entered will be reflected on all printed form(s).</u></b></p>



### Printer Errors

There are some print drivers that may cause "Printer Errors". (e.g., HP LaserJet 4L's HPPCL5E.DRV.) If you experience any "Printer Error" problems contact the manufacturer of your printer for an updated driver or other solution.

## BACKING UP YOUR DATA

<p><b>Backing up Data Files</b></p>	<p>To start the backup procedure click on "File" at the top of the screen then "Backup." A Backup menu with the default path C:\BBOOK\BACKUP will appear. To backup to another directory or other media, simply replace C:\BBOOK\BACKUP with the desired drive letter and path. Further information relating to backing up your data can be found in "How to Use The Beneficiary Book" in the "Help" drop down menu.</p>
<p><b>When backing up to your hard drive, use this format:</b></p>	<div data-bbox="602 590 1247 919" data-label="Image"> </div> <p><b>IMPORTANT!</b> If you choose to change the name of your Backup Directory and/or filename, <u>use a directory and/or filename that DOES NOT exceed eight (8) characters.</u></p>
<p><b>When backing up to a floppy or other media, use this format:</b></p> <p>(Note: For other media: zip drives, RW CDs, etc., substitute A:\ for the appropriate drive letter.)</p>	<div data-bbox="602 1031 1247 1360" data-label="Image"> </div>

## RESTORING YOUR DATA FILES

<p><b>Restoring Data</b></p>	<p>Using your last good backup, replace all data files in your C:\BBOOK\Data directory. Your Data files start with "Accounts.dbf" and end with "Vehnames.mdx." <b>Caution! Do not delete 1-1.rpt through 8-5.rpt files.</b></p>
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## TECHNICAL QUESTIONS

If you have any technical questions, please contact us at support@active-insights.com. We will endeavor to answer technical questions in 24-hours.

## TECHNICAL SUPPORT

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Live technical support is available Monday to Friday (9:00 AM to 5:00 PM Eastern Time) by calling (954) 426-6099.

**Important!** Please fill out and mail the Registration Form (on the following page). Only registered owners will receive technical support.

## COMMENTS, SUGGESTIONS AND IDEAS

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If you have any comments suggestions or ideas you would like to share, please write, fax or e-mail us.

### *Active Insights*

P.O. Box 500028  
San Diego, CA 92150

Corporate Offices: 760-489-8200

E-mail: [info@active-insights.com](mailto:info@active-insights.com) – Web site: [www.active-insights.com](http://www.active-insights.com)

Sales: 1-800-222-9125 – Special Orders: 1-800-762-5454 – Fax: 760-489-8111

Please complete and return the following Registration Form to:

Active Insights  
PO Box 50028  
San Diego, CA 92150

# THE BENEFICIARY BOOK

Software for Windows™

## REGISTRATION FORM

Please mail this form today. It only takes a minute, but it will allow us to keep you updated. (Please print or type using red or black ink)

Last Name \_\_\_\_\_

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ E-mail \_\_\_\_\_

Date of Purchase \_\_\_\_\_