Ohio Business Forms

Version 3

Puritas Springs Software

645 McKee Trail
Hinckley, Ohio 44233-9209

Copyright Notice

Disclaimer & Limitations

Getting Started A B

Ohio Business Forms - Version 3 (OBF3) is a 32-bit application that was designed to run in either *Windows* or *OSX for Apple/Mac*.

System Requirements. ***OBF3*** requires a Pentium or equivalent processor with at least 32 MB of RAM. ***OBF3*** is provided to purchasers as a downloadable executable of approximately 8 megabytes. ***OBF3*** works best on a computer that is equipped with a SVGA video card capable of minimum resolution of 800 x 600 with a minimum of 256 colors and a compatible printer. Higher resolutions and color depth are recommended.

WARNING: United States Copyright laws protect ***OBF3*** as the property of **Puritas Springs Software**. *OBF3* contains a registered serial number that is located in various places within the software. Possessors of unauthorized copies violate Federal law.

Note that the files on the ***Puritas Springs*** disks are compressed. You cannot copy them to your hard drive manually. You must "install" them using the SETUP application.

Installing WMinor5

Overview

You install ***Ohio Business Forms—Version 3 (OBF3)*** to your computer by simply running the setupobf3.exe file from our web server. You are always assigned a password for that purpose although passwords expire after a period of time. You will be assigned a new password if you need to reinstall the software and Version 3 is the current version at that time. Although the installation process is automatic, you can follow the steps on the next page just to make sure that the installation moving along smoothly.

NOTE ABOUT RUNNING APPLICATIONS: Many of the installation problems we encounter in technical support are the result of the user running programs in the background during installation. When you install ***OBF3***, you should make sure there are no applications running. Therefore, there should be no application buttons on the task bar. If you're unsure how to check what's running, we recommend rebooting your computer and doing the install right after you've rebooted and before you run any other application. Note that some applications execute automatically on startup, these too should be terminated before beginning the install. You may want to ask someone to help on this very important step if you're unsure about how to check for running applications.

Network Installations & Licensing

In the case of network installations, the types and implementations are diverse and we cannot give network-specific technical support although we answer questions *about **OBF3*** to assist network administrators during installation and setup. Note that you must have a network license to be able to install ***OBF3*** for use on a network.

Windows Installation Steps

A. The Preparing to Install screen will appear briefly as *InstallShield* sets itself up to begin the installation process. Typically, you'll see a progress meter until the Welcome dialog appears. Click the Next button to proceed with installation. Click Cancel if you want to abort installation.

B. The **Puritas Springs Software Licensing Agreement** appears in the next dialog. Click on the I accept ... option to accept the terms and conditions of the license, and then click on the Next button to continue with the installation. If you do not agree to the terms of the Licensing Agreement, you will not be able

to continue installing the program.

C. Verify your user identification information and click the Next button. Unless you have a compelling reason to do otherwise, leave the Anyone who uses this computer option selected.

D. You will now see the Ready to Install dialog. Click the Install button to begin the actual installation process. As files are copied and installation tasks are completed by the *InstallShield Wizard*, a progress meter will keep you informed as the stages of installation are completed.

E. On some systems you may be asked to confirm the installation directory. By default the location is C:\Program Files\Puritas\OBF3. On 64-bit systems the location is C:\Program Files (x86)\Puritas\OBF3.We recommend leaving the default location in place and do not support installations to alternate locations.

F. On some systems you may be asked to confirm the database directory. The "database" is the location where your client files will be kept. By default the location is C:\Puritas\OBF3\Files. We recommend leaving the default location in place and do not support installations to alternate locations unless you have purchased the network or multi-user version of *OBF3*.

G. When installation is complete a Installation Wizard Completed dialog appears on the screen and you can click the Finish button.

Running The Program

When installation is complete, a *OBF3* icon is placed on your desktop. You can start the program by clicking on the icon. You can also run the program in the conventional manner by clicking on the Start button in the lower, left corner of your screen, then click the Programs or All Programs item, then the **Puritas Springs Software** submenu, and finally click on the *OBF3* item.

Entering Information

A Minor's Claim Tutorial

When you start ***Ohio Business Forms— Version 3 (OBF3)*** it presents a Main Window from which you can perform all the steps that are necessary or proper when dissolving and Ohio business. Essentially, when you start ***OBF3*** or use the File|New command, you start with a blank dissolution forms and letters (except for any information present in the DEFAULT file). In general you type your answers in the spaces provided and use the ⌨(TAB) key to move from field to field as you complete the return. In this context note that [SHIFT] ⌨ moves focus backward.

You won't go too far before noticing that you cannot tab to every field. Some fields or lines are calculated by ***OBF3*** based on information you entered elsewhere (usually from one of the two worksheets—General Information Worksheet or the Members/Directors Worksheet). The Business Name field on the General Information Worksheet is an example. The name of the business appears on every form and, in many cases, in multiple parts of a form. Part of the utility of ***OBF3*** is that it takes all the assembled common information and transfers it automatically from the worksheets to the forms and letters.

The basic steps to follow when dissolving a business are listed from top to bottom in the Main Window:

1 **Client Interview Worksheets**. This item of the tree view has a nodal button that provides access to the two worksheets—the General Information Worksheet and the Directory. The General Information item also has a nodal button that expands to give you alternate ways of visiting the General Information Worksheet: 1) displaying the worksheet, 2) creating a blank, new file and then displaying the worksheet, and 3) opening an existing file and then displaying the worksheet. Note that the Directory Worksheet includes other categories of business individuals such as officers, incorporators and liquidating trustees.

2 **Name & Save File.** We once heard the rule expressed—save early and often. That's good advice and now is as good a time as any to save your work and name your file. When you click on this item, the Save As dialog appears.

3 **Dissolution Forms and Letters.** This level gives you access to all the forms and letters included in ***OBF3***. The available documents are separated into five subsections—corporate resolutions, Secretary of State forms, Ohio Department of Taxation forms, IRS forms, and miscellaneous forms, notices and letters.

4 **Save File Again.** Don't expect much to happen on your screen when you select this item. Assuming your file has a name, all your information is saved, *i.e.*, any forms that you completed in the previous step. Clicking on this item is the same as clicking on the Save button or using the Save command on the File menu.

5 **Print Selected Forms**. Print your forms using the File|Print|Selected Forms dialog. This item is the same as the File menu's Print|Selected Forms command. It's the main way of printing any one or any batch of forms.

6 **Send Selected Forms to Word Processor**. Send the selected forms to your word processor where they can be formatted and edited. This item is the same as the File menu's Send To Word Processor command. Great for extraordinary changes, faxing, emailing, spell checking, *etc*.

This tutorial will take you keystroke by keystroke through the steps outlined above. Note that the tutorial is based on the SAMPLE.OB3 file on your disk. If you wish to follow the tutorial without doing the typing, you can load the SAMPLE file and read on.

Step 1. Complete the General Information Worksheet.

Display the General Information Worksheet. When you first start *OBF3* you see the Main Window. In the Main Window you should click on the [+] to the left of Client Interview, then click on the [+] to the left of General Information, and finally click on Display Worksheet. In a second or two you'll see a blank General Information Worksheet. The cursor is blinking in the Business Name field. Type "Sample Industries, Inc." and then press the tab ⊟ key. Pressing ⊟ takes you to the next field—"Address of principal Office." In that field type: "22 East Blvd." The rest of the General Information Worksheet can be completed as shown in the table below. **Remember to press ⊟ to move from field to field.**

Field	Answer
Business	
Name	Sample Industries, Inc.
Address of Principal Office	22 East Blvd.
City	Cleveland
State	Ohio
ZIP Code	44113
County	Cuyahoga
Phone No.	440-555-1212
Employer ID/ Taxpayer number	987-65-4321

There's not much point in listing each entry on the General Information Worksheet. You can open the Sample.OB3 file and print it if you like. Instead we'd like to give you few tips for moving about in the screens.

1. Use the <TAB> key to move from field to field on a form. This is good way to move logically through all the input fields on a form from top to bottom.

2. Use the <SHIFT><TAB> key to move backwards (in reverse tabbing order) from field to field on a form. This is good way to move to an entry that you're having difficulty mousing to.

3. The mouse can get a littler skittish when you move down through long forms. In those instances use the <TAB> / <SHIFT><TAB> key combinations to do your fine navigation. You can use <SHIFT><TAB> to move from the first to the last item on a page.

4. Checkboxes can be toggled on and off by using the <SPACE> bar on your keyboard.

When you've completed the General Information Worksheet, click on the Main Window button to get back to the Main Window and click on the Directory item. Fill it out like you filled out the General Information Worksheet. It's just names and addresses, *etc*.

Step 2. Saving and Naming Your File.

The client interview worksheets are completed. Save your work by using the File|Save As command on the menu bar or using the Main Window's tree view item 2. Save and Name Your File. When you are asked for a file name, use any legitimate *Windows* name. **It's probably best to use simple names that are as short as conveniently possible. Do not use an extension other than OB3**. As with most other *Windows* programs, you don't even need to add the extension "OB3" or the period that separates the file name (Grenessem, Robert F) from the extension (BDK). *OBF3* will do all this automatically.

If all went well, the top of your screen should look like the one shown at the bottom of this page.

Step 3. Dissolution Forms & Letters.

At this point, most of the boilerplate information will flow to the forms automatically. In fact, some forms, like the corporate resolutions will be completed in their entirety. Other forms, like the Ohio Secretary of State forms need to be displayed ande tabbed through in order to complete them in their entirety.

The always wisest to review each applicable form, notice and letter to make sure it is complete. You can view any form or schedule from the Display menu as well as this level of the Main Window's tree view. Sometimes it's more convenient to make a draft printout of the entire return (following Step 5 below) and proofread the return on paper versus on screen.

Step 4. Saving Your File Again.

As explained earlier, don't expect much to happen on your screen when you select this item. Your client file was given a name in Step 2 above. Clicking on this item is the same as clicking on the Save button or using the Save command on the File menu.

Step 5. Print the various required forms using the File|Print|Selected Forms dialog.

When you're satisfied that the forms and letters are completed properly and ready for signing and filing, go to the Print Selected Forms dialog on the File menu's Print submenu. When the dialog appears, check the documents you want and click the Print button

Step 6. Send the various required forms to your word processor using the File|Send to Word Processor|Selected Forms dialog.

Send the selected forms to your word processor where they can be formatted and edited. This item is the same as the File menu's Send To Word Processor command. Great for extraordinary changes, faxing, emailing, spell checking, *etc*.

Don't Neglect Our Help Files

This paper manual is merely an outline of the basics of installation, getting started and a tutorial on basic information entry. You can get additional help via the program's Help|Table of Contents menu. This program has context-sensitive help. That means that you get help on a specific menu item without searching for that topic. Simply highlight the menu command and press [F1] . Many other objects on your screen have associated help topics, *i.e.*, window scaling. When in doubt, move focus to the component object and press [F1] .

The mouse won't work to highlight a menu command. You must use the keyboard. To give an example, if you wanted help with the Save As command you would press [ALT] [F] to pull down the File menu, and use the arrow keys to highlight the Save As command. With the command highlighted press the [F1] key.

If you're like us, you might be doubtful as to whether help files can be truly helpful. Regardless of any drawbacks, we found them to have significant benefits over their paper counterpart.

Help Is Always There
When we were at the office, the manual was at home. When were on the computer at home, the manual was at the office. On unfortunate occasions, that alone can make you lose a day. It never happens with help files. They're always there. A copy for your home computer, and a separate one for the office. Ditto for your laptop! When you're desperate for information, you can always count on its accessibility.

Help Is Hyperlinked, Searchable & Better Indexed.
We took extra time to develop a logical system of indexing. You should find that a help file's searchability can be a time-saver when you're looking for a snatch of text. The point and click links between key words provide instant information without fumbling though page after page looking for something. This **non-linear** characteristic is part of what makes help files so uniquely useful.

Help Is Up To Date
Because they are printed in large quantities, paper manuals fall out of synch with last-minute or late-minor programming changes. Help files, on the other hand, are easier to keep current with programming changes because their modification involves no additional processing steps to implement (*i.e.,* physical transportation, printing, binding, *etc*.).

Paper Fix
Don't forget that you can print any help topic by pressing the help window's Print button, or using the menu's Print Topic command.

Essential Help Topics

Checking out these help topics before starting *OBF3* will reduce the slope of the learning curve. Although *OBF3* relatively straightforward to use, you'll find that once you've mastered the database worksheets, you've learned not just this but all of our programs. This is because almost all of our programs use the worksheets to minimize data entry.

1. What are the worksheets used for?
There are three database worksheets (not to be confused with the General Information Worksheet). One of the three is the Accounting Worksheet. It is the central area where *OBF3* keeps financial information. This short topic describes how to enter information into and use the worksheets. A similar worksheet is used for keeping track of spouses, children, parents, next of kin and beneficiaries. A third database worksheet is used to keep track of attorney time and services performed relative to the wrongful death or minor's claim.

2. What is the DEFAULT.OB3 file?
This topic explains the purpose of the DEFAULT.OB3 file and how to customize the blank, start-up set of probate forms so that common information appears automatically when you select New from the File menu.

3. Using The Keyboard
This is a good topic to print because it summarizes all the keyboard shortcut commands in the program.

4. Overriding Answers
You will use this command when you need to manipulate entries in text input dialogs that contain green colored texts.

5. Common Questions
If we get recurring questions about a particular facet of *OBF3* operation, you will find the relevant help topic cited here.