

U.S. Estate Tax

For Dates of Death in 2009



EZ-Start Guide
Getting Started Quickly

U.S. Estate Tax

For Dates of Death in 2009
Version 12+

Puritas Springs Software

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Installation

- A. Place the **W706_09** compact disk (CD) in your CD or DVD drive. **Windows 7 & Vista.** Some machines have security settings that interfere with the installation or operation of **W706_09**. If you have such a problem try installing as follows (if you've already completed the installation, then uninstall **W706_09** first):
1. **Defeat Autostart.** Do not allow the CD to auto-start when you put it in the drive. Defeat autostart by holding down the **[SHIFT]** when you insert the CD; or cancelling the install process if it autostarts anyway.
 2. **Explore the CD.** With the CD in the drive, go to My Computer and right-click your mouse on the CD drive. Choose **Explore** from the popup menu.
 3. **Run As Administrator.** Find the **setup.exe** file. Note that sometimes the extension is hidden or there are more than one setup file. Make sure you right-click on the **setup.exe** file. Choose **Run as administrator** from the pop-up menu. Click on the **Continue** button when the screen goes dark, then follow normal installation procedures.
- B. On most systems, depending on your license, installation will begin automatically when you insert the CD. **If the InstallShield installation wizard does not start automatically,** do the following: (1) Press the **Start** button; (2) Click on the **Run** item; and (3) Type the following command: **D:\SETUP.EXE**
- The Setup progress meter appears briefly until the **Welcome** dialog displays. Click the **Next** button to begin installation. Click **Cancel** if you want to abort installation.
- C. The **Puritas Springs Software Licensing Agreement** appears in the next dialog. Click the **"I accept ..."** radio button to accept the terms and conditions of the license and click the **Next** button to continue the installation. If you do not agree to the terms of the Licensing Agreement, you will not be able to continue.
- D. Verify or enter your customer identification information and click the **Next** button.
- E. Verify the installation directory. **We strongly recommend using C:\Program Files\Puritas\W706_09 which is the default.** If you want to use an alternate installation directory or drive, you can use the **Change** button to make your selection. Click the **Next** button to continue. **WARNING: Changing the default installation directory will require corresponding adjustments to the default file locations on the Options menu.**
- F. Verify the database directory. By "database" InstallShield means the place where you store your client files. **We strongly recommend using C:\Puritas\W706_09 which is the default.** Click **Next** to continue. **WARNING: Changing the default database directory will require corresponding adjustments to the default ETD file location on the Options menu.**
- G. The installation begins when you click the **Install** button in the **Ready to Install the Program** dialog. A progress meter will keep you informed as the program files are transferred from the CD to your hard drive.
- H. When the installation process is complete, the **InstallShield Wizard Completed** dialog appears. Click on the **Finish** button.

Updating

Because tax law changes periodically, it is important to check for available updates. The process is simple. Follow these steps or go to **W706_09's Owners Manual** on the **Help** menu and look for the article related upgrading and reinstalling. It is more detailed and serves well as an installation guide when printed.

- I. **Download the Upgrade.**
- II. **Remove W706_09.** First, it is important to know that removing **W706_09** using **Control Panel's Add/Remove** function will not delete or harm your client files. That being said, you should always back up your client files. They are stored in the subfolder: **C:\Puritas\W706_09**.
- III. **Install the New Version.** Install the new version by executing the file you downloaded. The file name is "setupw706_09.exe" (note that sometimes the exe extension is hidden). It is located at **C:\Puritas\W706_09**. Find the file, double-click on it, and follow the on screen instructions.

Windows 7 & Vista. In certain installations of these *Windows*, it is necessary to right-click on the file name (**setupw706_09.exe**) and select **Run as administrator** from the popup menu instead of double-clicking the file to begin installation.

Running W706_09

You start **W706_09** by (1) double-clicking the **W706_09** icon on the desktop, (2) clicking on the **Start** button, selecting the **Programs** submenu, then the **Puritas Springs Software** submenu, and finally the **W706_09** item, or (3) double-clicking on any ETD file, *i.e.* from *Windows Explorer*.

Windows 7 & Vista. In certain installations of these *Windows*, it is necessary to right-click on the desktop icon and select **Run as administrator** from the popup menu instead of double-clicking the icon to begin installation.

Tutorial

We mentioned the **Owners Manual** in connection with downloading upgrades, but there's also a section in the manual titled "Entering Information" that provides a step-by-step guide to completing and printing your tax forms. Remember you can view and print your manual by clicking on the **Manual** item on **W706_09 Help** menu. The pdf file that is the manual (**w706_09.pdf**) can also be found in the program folder on your hard drive as well as on the distribution CD.

* Note the importance of checking for updates. Updates are especially important in tax software due to the time constraints involved in developing and publishing tax software as well as IRS form releases that post-date the initial publication of **W706_09**. See the abbreviated instructions at the top of this page.