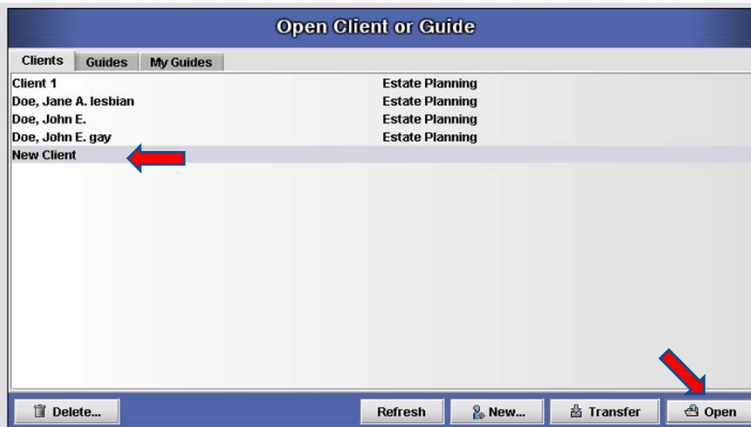


How To Use My Guides In DPS

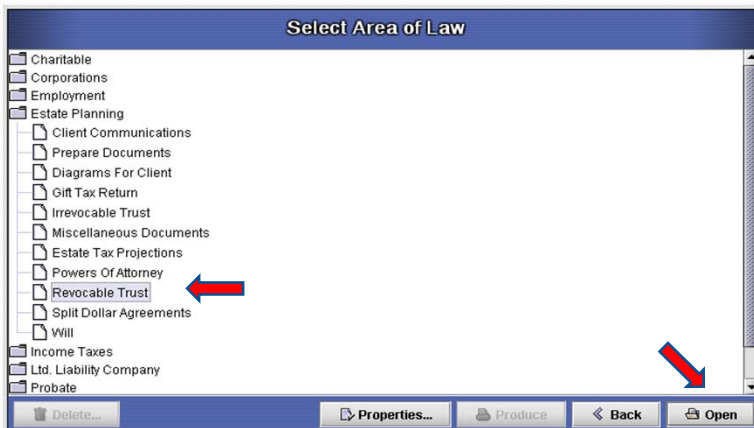
Purpose Of This Tutorial

- This tutorial will show you how to create and use your customized Guides in DPS.
- You can create your own customized Guides if you find that the Guides provided with DPS do not cover typical situations you encounter in your practice.

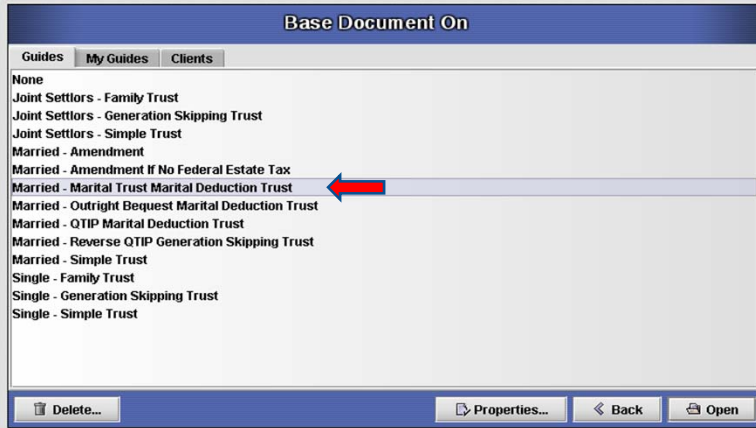
First you must determine the DPS Guide which is closest to what you want for your customized Guide
Create a new client and Select Open



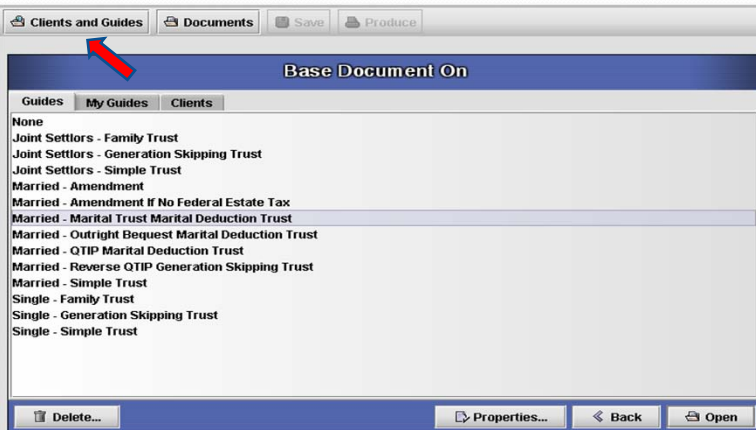
Select the Area of Law – Estate Planning
Select the Document – Revocable Trust
Select Open



On the Base Document On screen Guides tab
Note the exact name of the DPS Guide which is closest to
what you want for your customized Guide

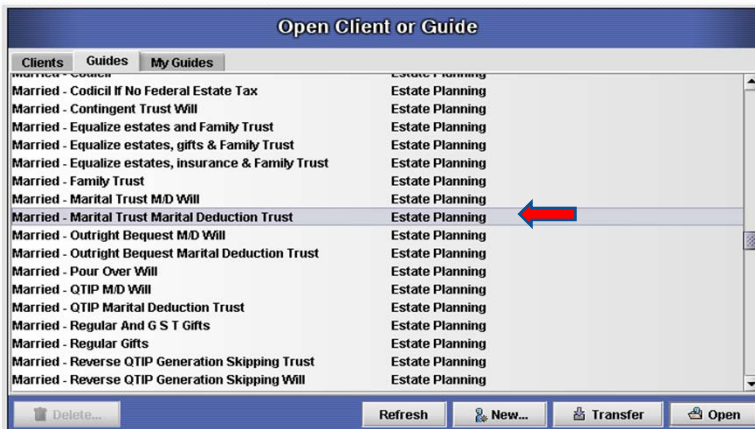


Select Clients and Guides to begin creating your
customized Guide

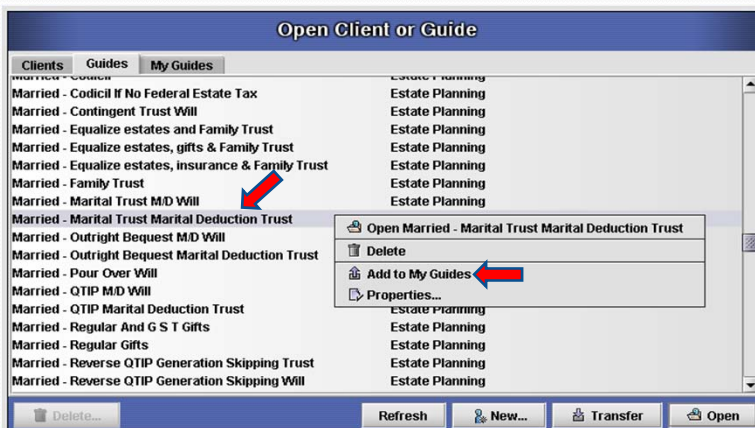


Select Guides

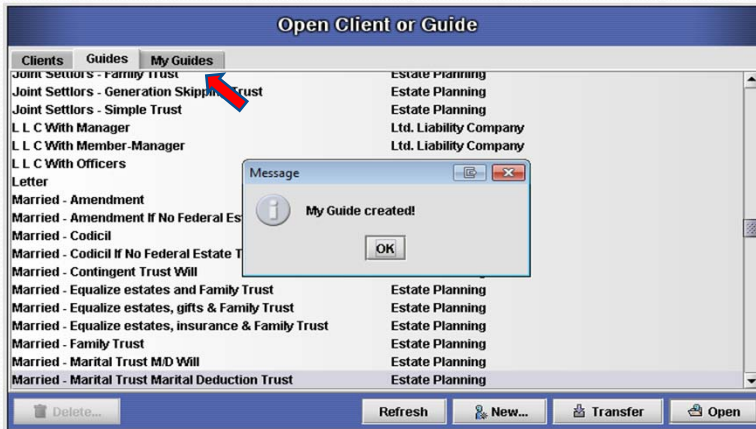
Select the DPS Guide which is most similar to the Guide you want to create



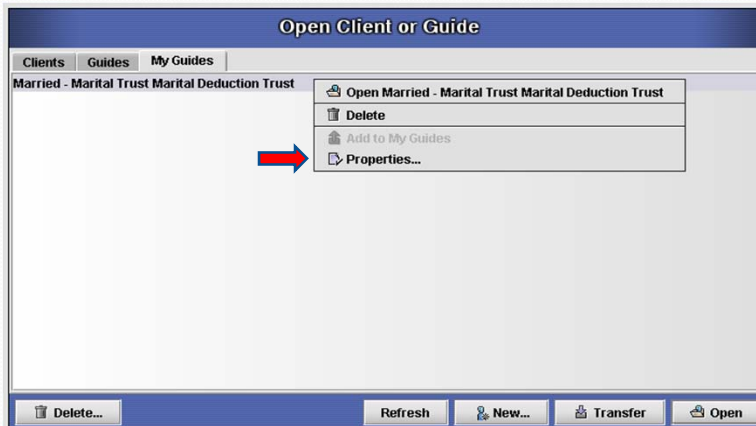
Right mouse click and select Add to My Guides



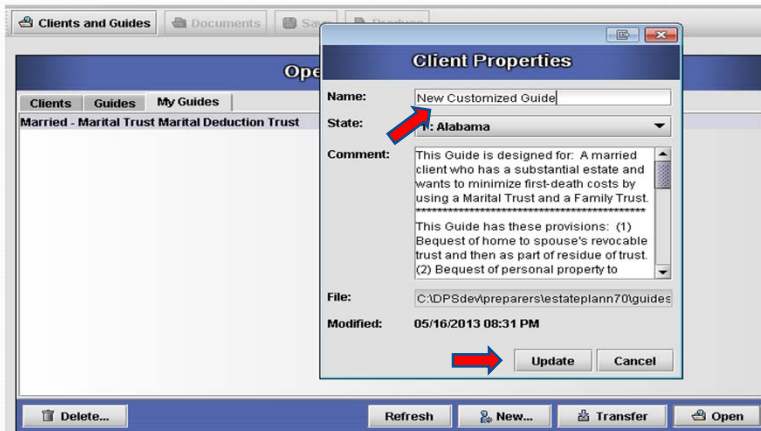
Your Guide will be created
Select the My Guides tab



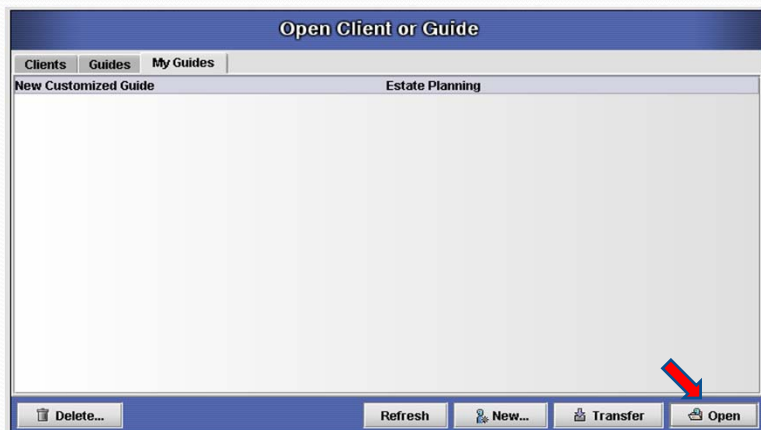
Right mouse click on the newly created Guide
Select Properties



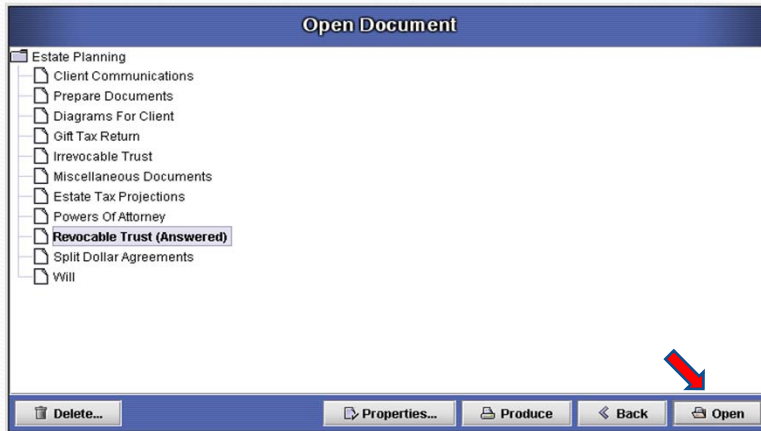
Change the Name of your new Guide
You can also change the default State and modify the
Description
Select Update



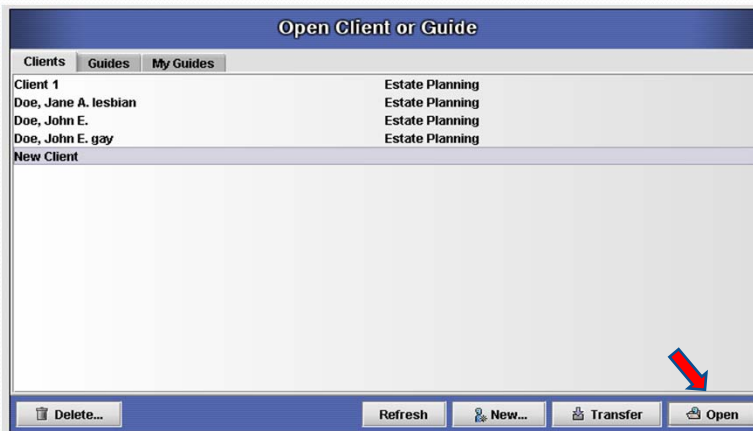
Your new Guide will be named correctly
Select Open



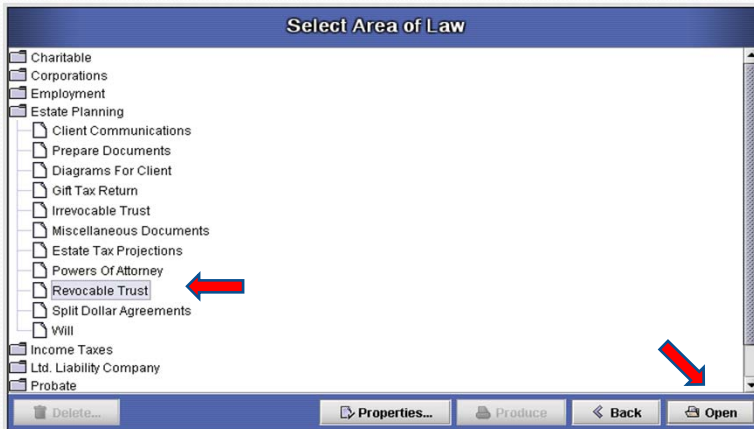
Open the Document and make all necessary changes
Save the Document when all changes have been made



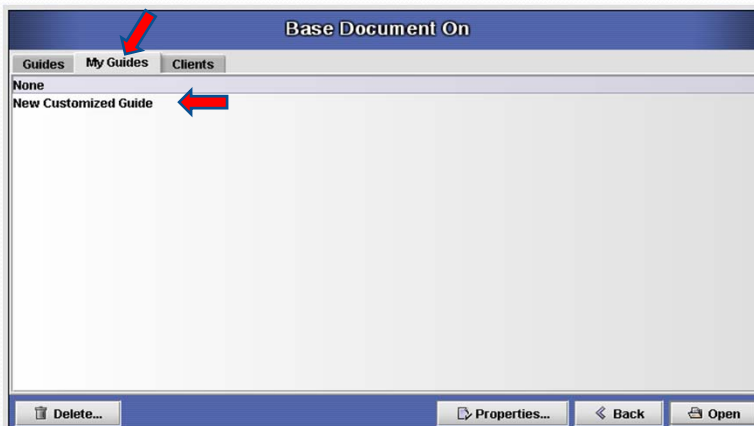
You can now create a new Client in DPS
Select Open



Select the Area of Law – Estate Planning
Select the Document – Revocable Trust
Select Open



On the Base Document On screen, select the My Guides tab
You can now base the Document on your new customized Guide





**For additional assistance call or email
Xan Taylor
Advanced Logic Systems
1-800-454-7703
support@dps8.com**