

How To Use My Guides In DPS

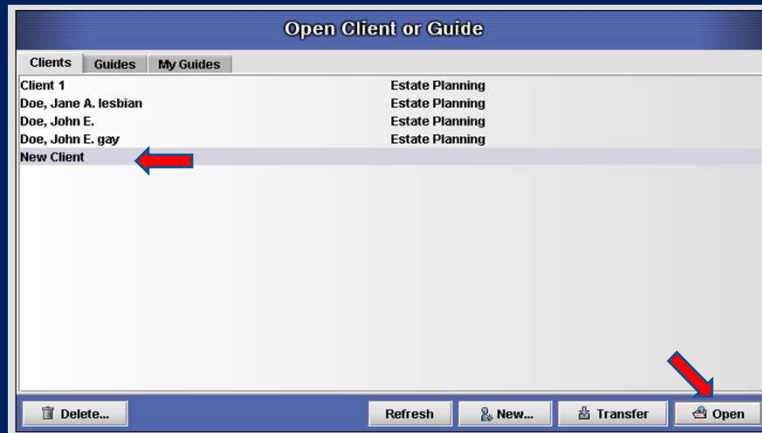
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Purpose Of This Tutorial

- 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.

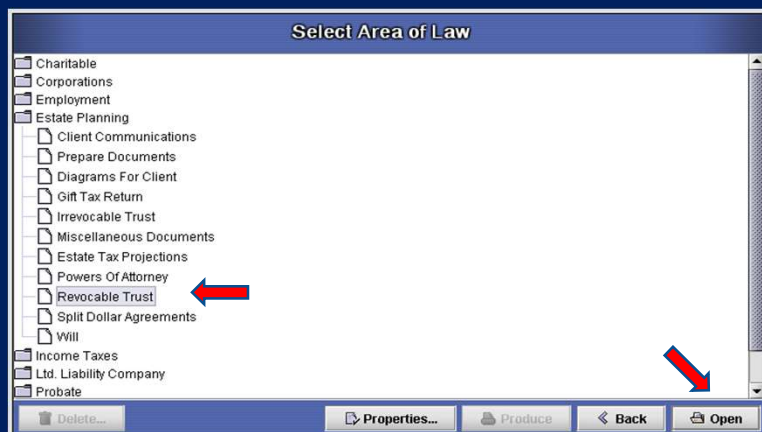
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First you must determine the DPS Guide which is closest to what you want for your customized Guide
Create a new client and Select Open



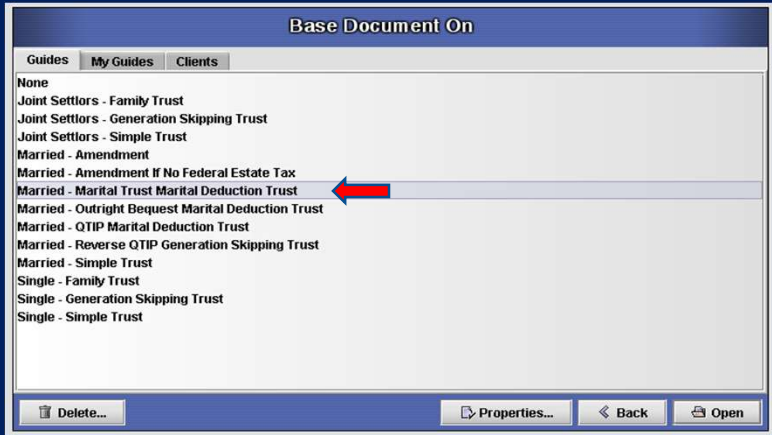
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Select the Area of Law – Estate Planning
Select the Document – Revocable Trust
Select Open



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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



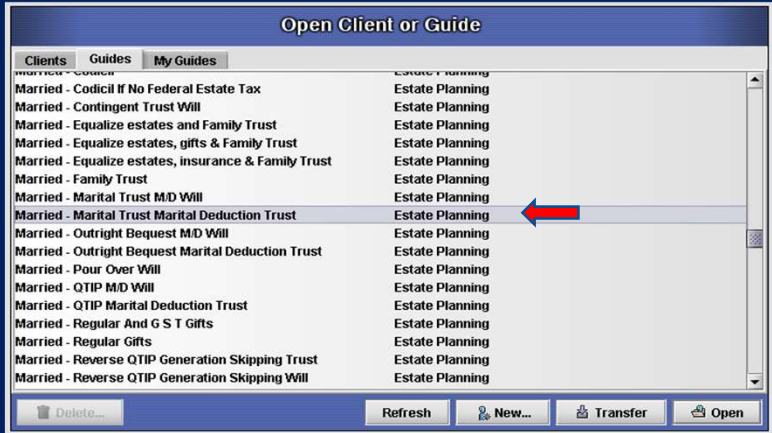
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Select Clients and Guides to begin creating your
customized Guide



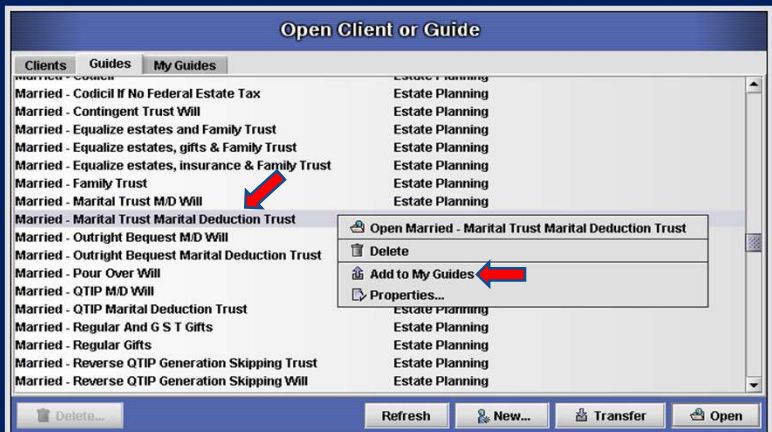
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Select Guides
Select the DPS Guide which is most similar to the Guide
you want to create



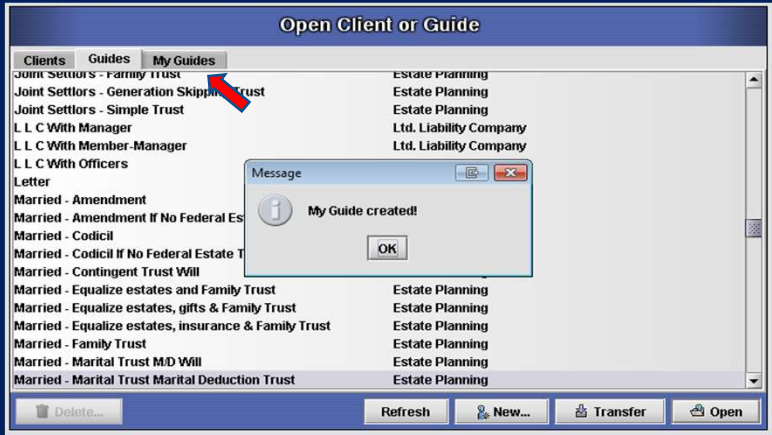
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Right mouse click and select Add to My Guides



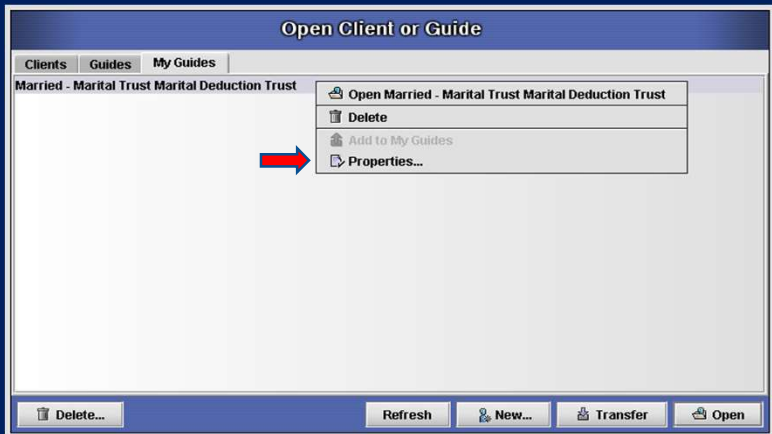
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Your Guide will be created
Select the My Guides tab



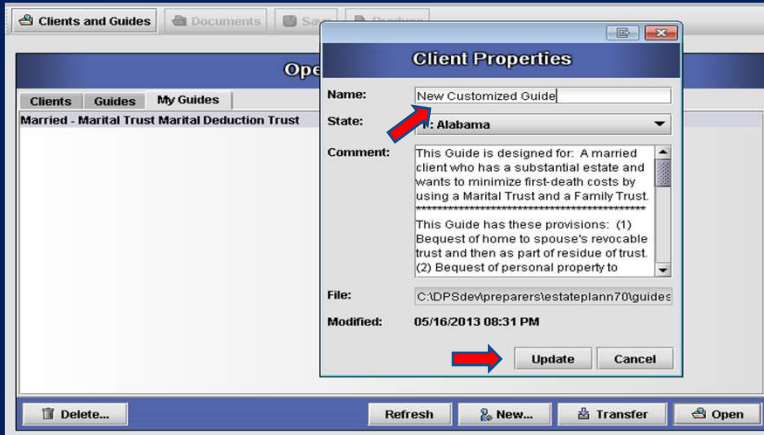
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Right mouse click on the newly created Guide
Select Properties



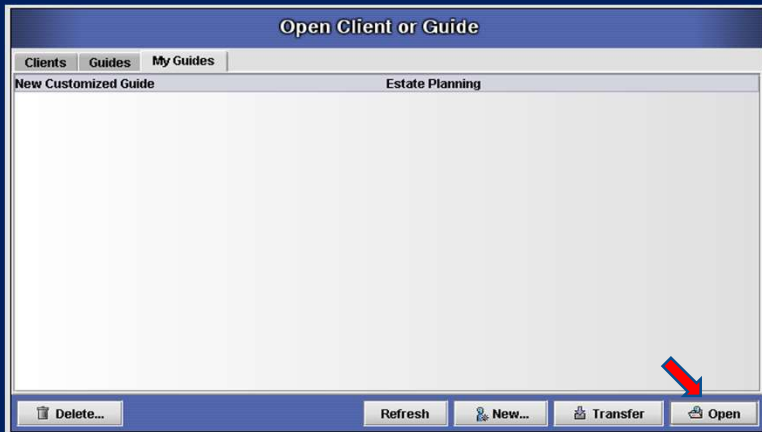
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Change the Name of your new Guide
You can also change the default State and modify the
Description
Select Update



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Your new Guide will be named correctly
Select Open



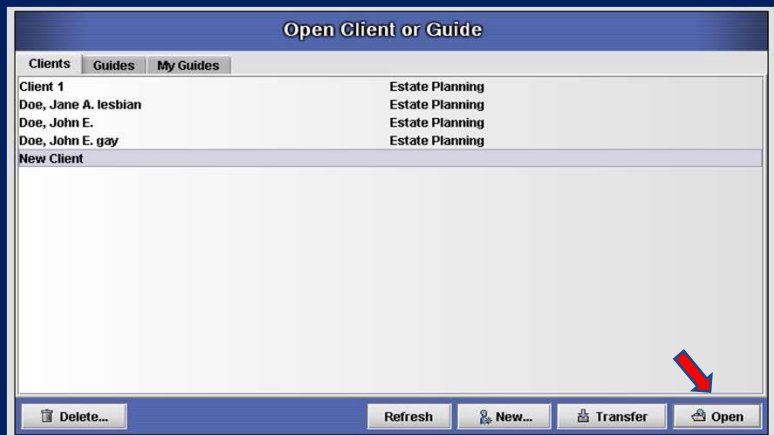
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Open the Document and make all necessary changes
Save the Document when all changes have been made



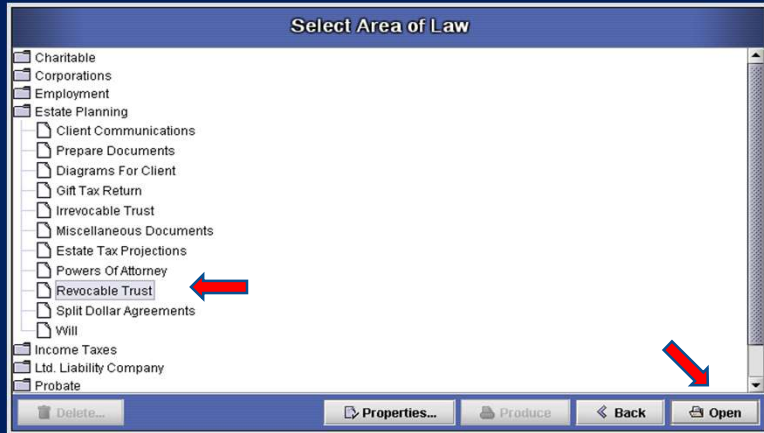
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You can now create a new Client in DPS
Select Open



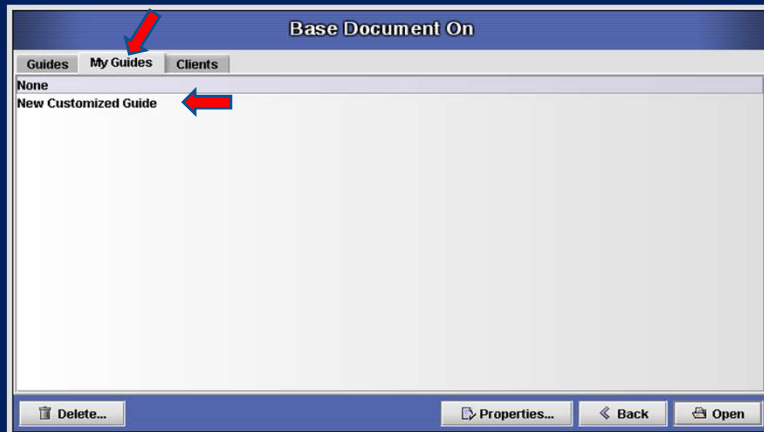
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Select the Area of Law – Estate Planning
Select the Document – Revocable Trust
Select Open



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



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**For additional assistance call or email
Support
Advanced Logic Systems
515-282-7702
support@dps8.com**