

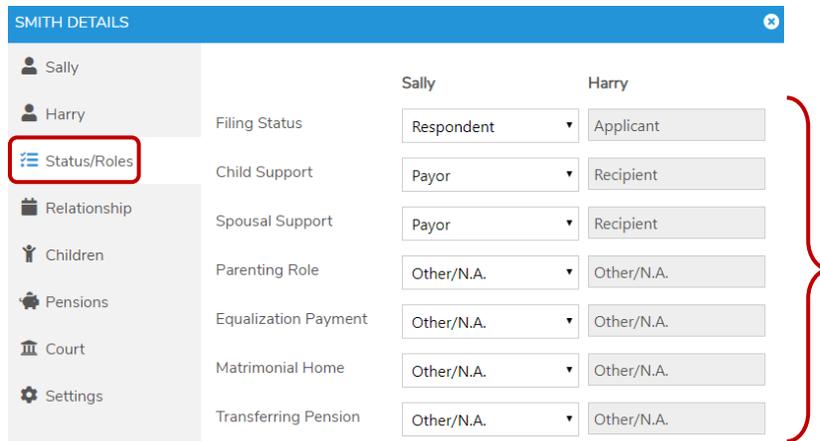
DM Cloud - Precedents Guide

(March, 2019)

Getting started - The Basics:

Before beginning any agreement in DM Precedents Cloud, ensure that you have completed the merge fields for the parties with their names, dates of birth, children, children’s birthdates, dates of marriage, separation and divorce (if applicable).

Also ensure that you have completed the “Status/Roles” tab, so that the software will know how to correctly configure your agreement.



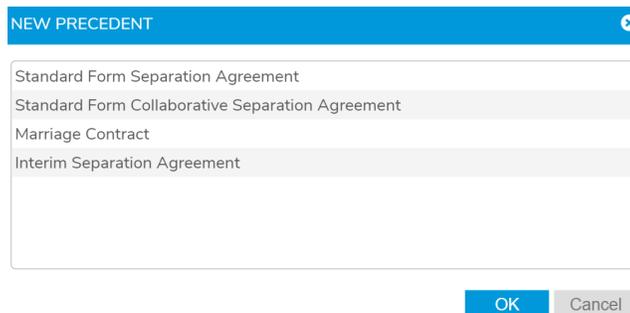
| SMITH DETAILS | | Sally | Harry |
|---------------------|----------------------|------------|------------|
| Sally | | | |
| Harry | Filing Status | Respondent | Applicant |
| Status/Roles | Child Support | Payor | Recipient |
| Relationship | Spousal Support | Payor | Recipient |
| Children | Parenting Role | Other/N.A. | Other/N.A. |
| Pensions | Equalization Payment | Other/N.A. | Other/N.A. |
| Court | Matrimonial Home | Other/N.A. | Other/N.A. |
| Settings | Transferring Pension | Other/N.A. | Other/N.A. |

Creating Agreement:

When you are ready to begin, click on the Matter for which you wish to do an agreement and click the yellow “NEW AGREEMENT” button located in the center of the screen just under the summarized Matter Details.



This will take you directly to DM Precedents Cloud where you click on the type of agreement you would like to create, and click “OK”.

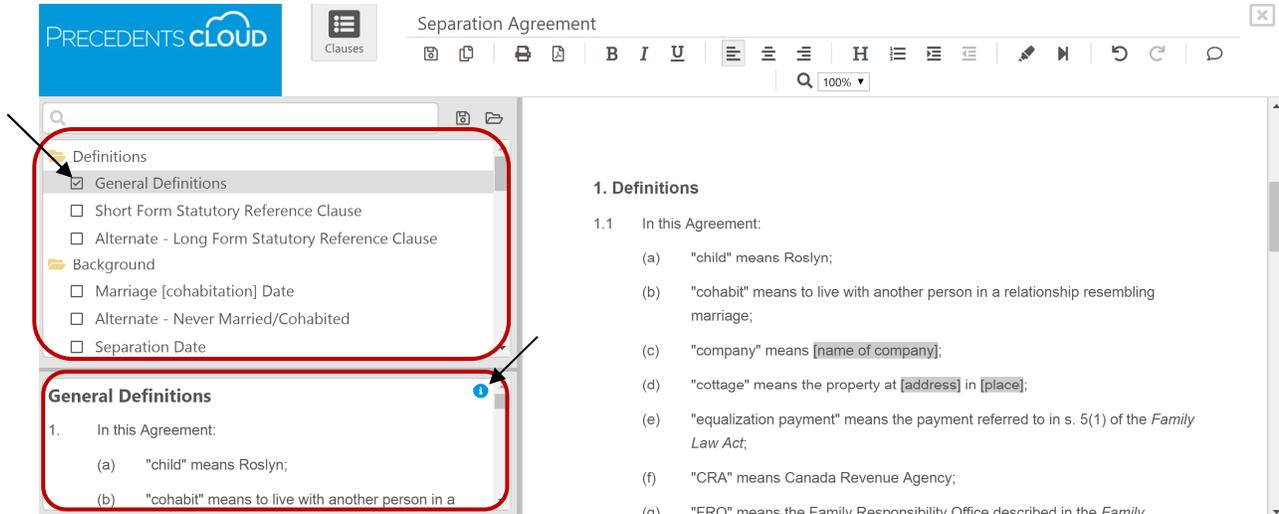


NEW PRECEDENT

- Standard Form Separation Agreement
- Standard Form Collaborative Separation Agreement
- Marriage Contract
- Interim Separation Agreement

OK Cancel

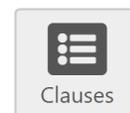
You will be directed to the DM Precedents Cloud screen for the agreement selected. On this screen, you will see a list of folders with clauses you can choose in the upper box on the left hand side.



Below that box, you will see the clause text; or, if you click on the “1” bubble in the corner of the box, you will see any commentary associated with that clause. To select a clause, simply click in the checkbox, or double click on the clause name.

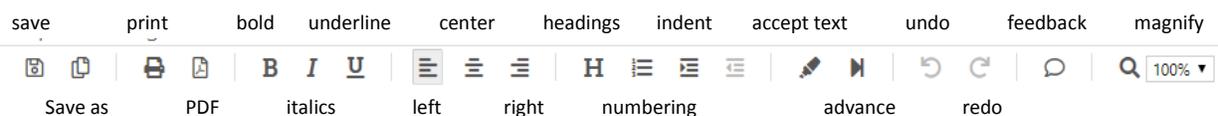
On the right hand side of the screen, you will see the agreement you are building. Every clause you select, will appear on the right and be momentarily highlighted in yellow. You are free to edit the agreement as you build it, or wait until the end to make your edits.

You may toggle between seeing the clauses and seeing the agreement on your full screen, by clicking the “Clauses” box near the top of the screen.



Toolbar:

The DM Precedents Cloud toolbar allows you to save, save as, print, and make a PDF of the agreement. You can also undo, redo, provide feedback and magnify the document.



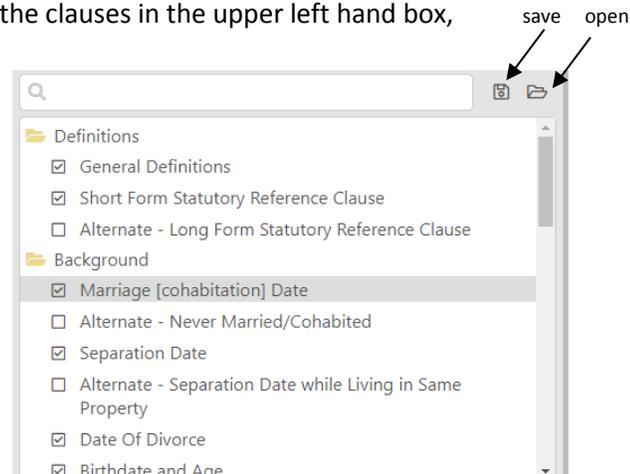
In addition, there are some standard formatting tools for use in the agreement – bold, italics, underlining, justification – as well as some more advanced tools – headings, numbering, indenting.

Finally, there are two features that pertain to the shaded areas of the agreement. The arrow icon  allows you to advance directly to the shaded areas in the agreement for completion. Once at a shaded area, you have three options: delete it; type in any missing or required information; or accept the shaded language by clicking on the highlighter icon  in the toolbar.

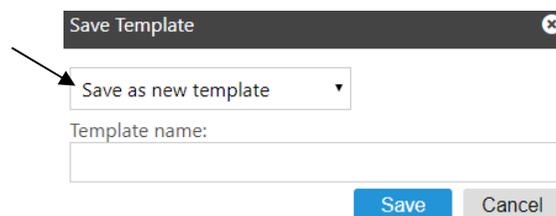
Review the agreement carefully and include and/or revise any clause as necessary. Be sure that all clauses selected are consistent and accurately reflect your client's particular circumstances.

Saving/Loading Clause Templates:

You may save any clauses you have selected on a matter as a template for use on any other matter, by clicking the save icon above the clauses in the upper left hand box,



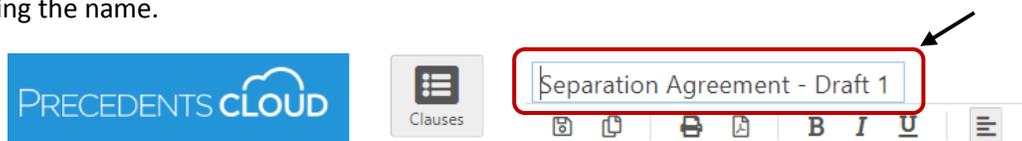
and then naming the template.



To select a template already saved, click on the open icon above the clauses. The clauses from that template will then be brought into any agreement on which you are working.

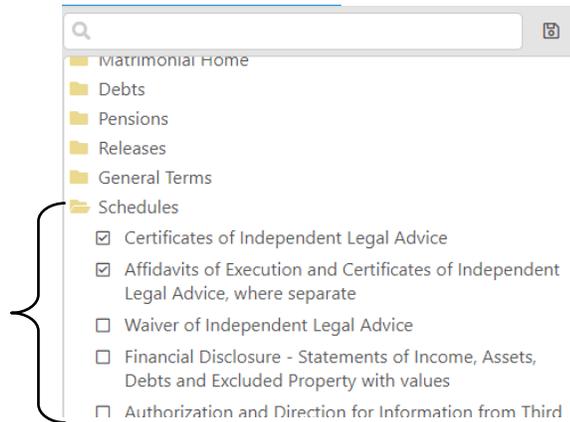
Naming/Renaming the Agreement:

You may also name any agreement, by clicking on the name of the agreement just above the toolbar and editing the name.



Schedules:

You may select the applicable schedules to be appended to the Agreement from the Schedule folder in the clause list.



In addition, there are some Financial Disclosure documents found in your DM Forms Cloud, that may be included as Schedules to any agreement.

| NEW FORM | |
|--------------|---|
| Q | GEN |
| FLA 14A | Affidavit (general) |
| FLA 17A | Case Conference Brief - General |
| FLA 17C | Settlement Conference Brief - General |
| FLA 25 | Order (General) |
| GEN 1 | Financial Disclosure (at separation) |
| GEN 2 | Financial Disclosure (at marriage) |
| GEN 3 | Simplified Net Family Property Statement |