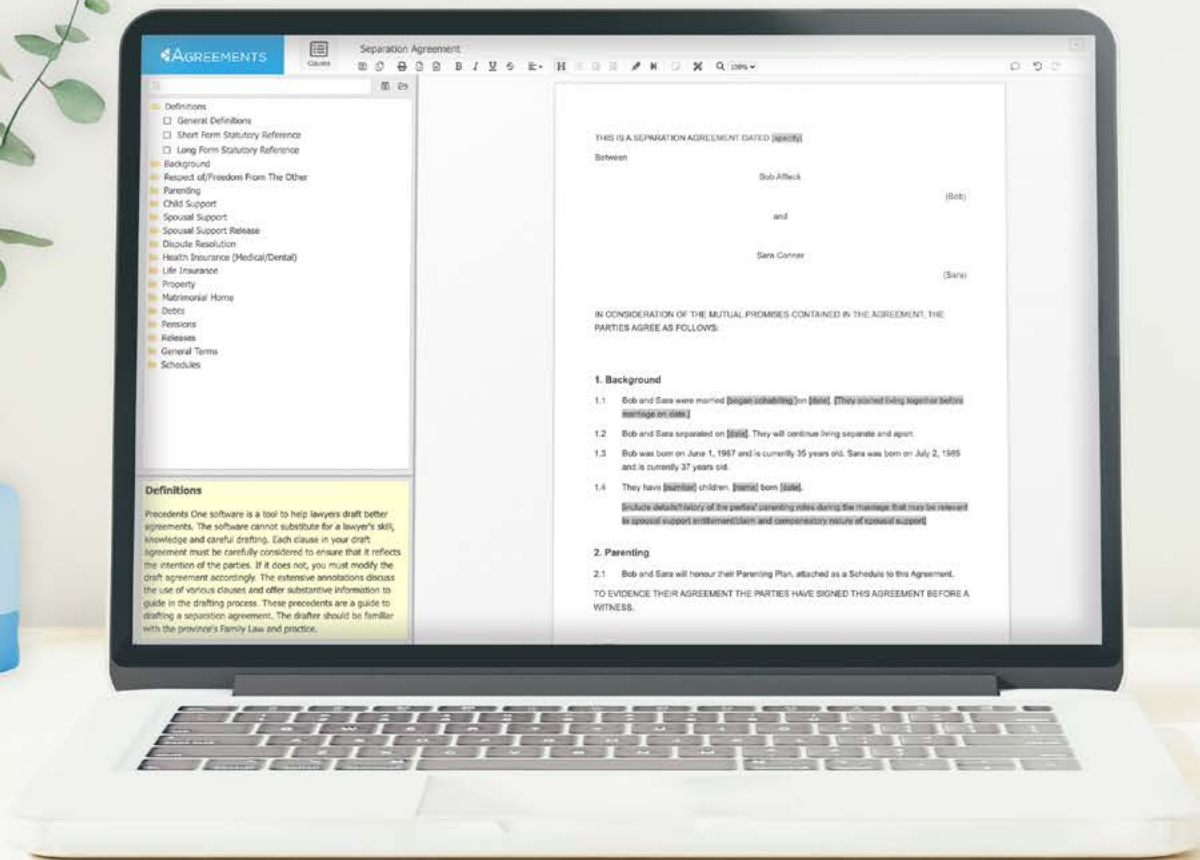


A Guide to DivorceMate Agreements



Getting started

Annotated Agreements and Checklists

Before using DivorceMate Cloud Agreements*, it may be helpful to reference the annotated Agreement(s), complete with all clauses and commentary/annotations.

Then, for each matter (i.e. client file) for which you will be preparing an Agreement, you can use the checklist as a reference and check off the boxes beside all desired clauses.

Find the annotated Agreements** and the checklists in DivorceMate Cloud under the **Help tab > User Guides**

The screenshot shows the DivorceMate Cloud interface. On the left is a navigation menu with the following items: MATTERS, ACCOUNT, HELP (highlighted in yellow), CONTACT US, USER GUIDES (highlighted in yellow), WHAT'S NEW, QUICK CALC, and FEEDBACK. The main content area is titled 'User Guides' and lists the following items:

- DM Cloud - Calculations Guide
- DM Cloud - Getting Started - Calculations
- DM Cloud - Forms Guide
- DM Cloud - Getting Started - Forms
- DM Cloud - Forms Guide - ON Financial Forms
- DM Cloud - Agreements Guide
- DM Cloud -Getting Started - Agreements
- Annotated Standard Form Separation Agreement [Checklist]
- Annotated Standard Form Collaborative Separation Agreement [Checklist]
- Annotated Ontario Marriage Contract [Checklist]
- Annotated Interim Separation Agreement [Checklist]
- Annotated Collaborative Practice Participation Agreement [Checklist]
- Annotated Parenting Plan [Checklist]
- Transferring Desktop Merge Info to DM Cloud

*DivorceMate Agreements are available in Alberta, British Columbia, and Ontario.

**Agreements available will vary by province.

Merge Information

Status Roles

To ensure the parties' information merges seamlessly into Agreements:

AFFLECK DETAILS

Bob | Middle | Our client

Affleck

Birthdate: Jun 1 1987

Sex (at birth): Male

Gender Pronouns: He/Him

Address: 123 Basic Avenue

City, Province: Vancouver BC

Postal Code: V5L 4S1

Municipality: Vancouver

Telephone: (604) 212-3375

Email: bobaffleck@gmail.com

Lawyer: Self Represented

OK Cancel

AFFLECK DETAILS

Bob | Sara

Preferred Name: Bob Sara

Filing Status: Applicant Respondent

Child Support: Payor Recipient

Spousal Support: Payor Recipient

Parenting Time: Equal Equal

Decision-Making: Joint Joint

Equalization Payment: Other/N.A. Other/N.A.

Matrimonial Home: Vacate Possession

Transferring Pension: Other/N.A. Other/N.A.

OK Cancel

1. Complete the merge fields for the parties with their names, birthdates, children, children's birthdates, dates of marriage, separation and divorce (if applicable).
2. Add the parties' **preferred gender pronouns** and enter a **preferred name** to be used throughout the Agreements.
3. Complete the dropdowns under the **Status/Roles** tab, so that the software correctly configures your Agreement.

Creating an Agreement

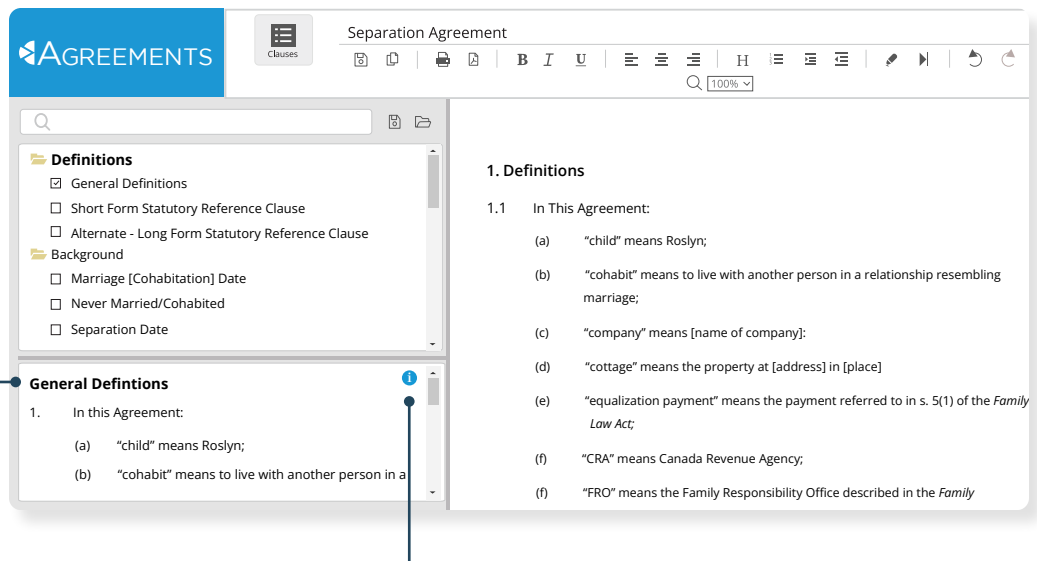
To create an Agreement:

1. Select the Matter for which you wish to create an Agreement.
2. Click the yellow NEW AGREEMENT button, located in the centre of the screen just under the summarized Matter Details. This opens DivorceMate Cloud Agreement.
3. Select the type of Agreement you would like to create, then click OK.



The text of the clause appears in the description box below.

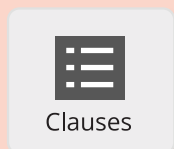
Clicking the “i” icon opens any commentary associated with that clause.



To open a clause, click it once.

To insert a clause into your Agreement, double-click it, or select its check box.

The Agreement you are building is shown on the right side of the screen. You can edit the Agreement as it is being built, or at the end of the building process.



Clauses

If you'd like to see the Agreement without the “Clauses” panel on the side, click the “Clauses” icon near the top of the screen

Toolbar



The Agreements toolbar allows you to save, save as, print, make a PDF and download your Agreement to Word. You can also undo, redo, watermark the Agreement as “draft”, magnify the document, and provide feedback.



















There are two features that pertain to the shaded areas of the Agreement. The arrow icon (Advance) allows you to advance directly to the shaded areas in the Agreement for completion. Once at a shaded area, you have three options:

1. Delete;
2. Enter any missing or required information;
3. Accept the shaded language by clicking the highlighter icon (Accept text) in the toolbar.

To make notes throughout the Agreement for yourself or others at your firm, highlight the applicable text in the Agreement, click the note icon, and include your notation.

Finally, review the Agreement 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.

Appendix

	Save		Italics		Indent
	Save as		Underline		Accept text
	Print		Strike through		Advance
	PDF		Align		Draft
	Word		Headings		Notes
	Bold		Numbering		Feedback

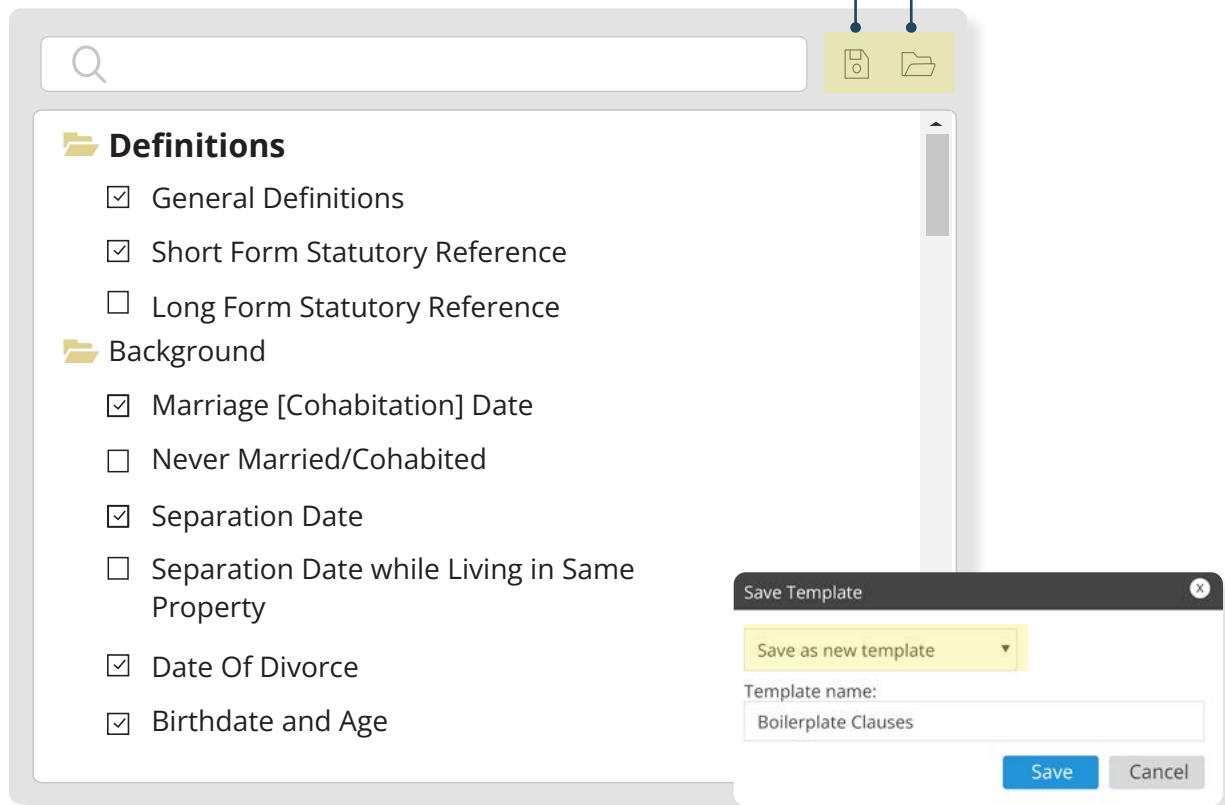
Saving/Loading Clause Templates

To save a clause template:

1. Select all of the clauses you wish to include.
2. Click the Save icon on the top-right corner. The Save Template window appears.
3. Enter a name for the template, then click the Save button.

To load a clause template:

1. Click the Open icon above the clauses. The Open Template window appears.
2. Select the template, and click the Open button. The clauses in the template are entered into the Agreement.



Schedules

You can 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 DivorceMate Cloud Forms, that can be included as Schedules to any Agreement.

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