Perfect Form

Up and Running Quickly

- There must be some reason why over 70% of the Hamilton County law firms with more than 50 lawyers use Perfect Form.

- After installing Perfect Form, click on Help and then **Demo Movie**, and walk through the short demos. It won't take long. Then do an initial update to get the forms you need (the Demo Movie will show you how).

Work on a form

- The first screen you will see upon startup is the "Matter List" screen, that shows you all the different "matters" (estates, adoptions, domestic relations cases, etc.) that have been created. Initially, only the sample will be there. Double-click the Sample Estate and you will be taken to the "Forms" screen.

- On the left you can double-click on folders to expand them and navigate between different groups of forms. (If it only shows the Ohio Standard Estate forms then you didn't do an initial update.) Expand "Ohio" and then "Supreme Court Standard Forms" and then "Decedent's Estate" and finally click on "Part 1." The listing (menu) of forms will appear on the right. Double-click on form 2.0 (front). (We'll look at a probate form but the same principles apply to all other forms.)

- Much of the form is already filled in. This came automatically from "Standard Information." You can type in additional information. If you modify the Standard Information that carries to a form the field will turn red to remind you that you did this – click "Reset Red Fields" if you want to revert back.

- See the **Quick Guide** (included with this page) for different things you can do on a form. The Quick Guide can also be printed out from: www.perfform.com.

Standard Information

- Click the "Matter Info" tab. Expand "Standard Information" on the left by double-clicking on it. Double-click on "Estate." You can scroll through and modify the standard information that will carry to the decedent's estate and estate tax forms for this matter.

- Experiment! You can make a copy of the Sample Estate (the Quick Guide tells how to do this) and then just start changing things to see what happens.

- To learn how to enter items for the tax returns and accounting forms, click Help, and then Demo Movie.