HotDocs Document Services

Administrator's Guide

Version 2.4

Sample Templates and Forms

This product includes sample templates and forms only. Using them may have significant legal implications in some situations, and these implications vary by state and depending on the subject matter. Before using these templates and forms or adapting them for your business, you should consult with a lawyer and financial advisor.

Contact Information

For customer inquiries, contact:

HotDocs Limited
14 South Charlotte Street
Edinburgh, EH2 4AX
Scotland

publications@hotdocs.com

For technical support inquiries, call: (800) 828-8328 (US) or 0843 208 0704 (UK).

Table of Contents

HotDocs Document Services
Site Administrator's Guide

Welcome to Document Services

Welcome to the Document Services Administrators Guide. Document Services is a HotDocs Software-as-a-Service application (SaaS) hosted in Microsoft's Azure Cloud. Document Services enables you to upload the templates your firm creates in HotDocs Developer and store those templates on your firm's Document Services portal, or "site". When you want to assemble a document, Document Services transparently integrates with Cloud Services to assemble your documents in the cloud.

In addition to enabling your firm's users to generate documents in the cloud, Document Services includes features that enable you to automatically email interview links directly to your firm's clients. This feature reduces the time your firm's staff spend keying in client data. Document Services also enables you to embed links to interviews in any web page, again, enabling your clients to register with Document Services and to key in their own data.

When a client (or potential client) contacts you and wants to draft a document, you can use Document Services to email the client a link to an interview. After clicking the link, your client can log in to your firm's Document Services site and answer all the questions in the interview. When the client submits the interview, you receive an automated email about this event. You can then log back in to Document Services and use the client's answers to assemble completed, personalized documents for your client.

End User Alerts

Enhancements to browser interview functionality impact your end users most. The same is true of software issues that affect your end users' experience with your templates. We annotate both enhancements and issues here (except bug fixes, which are annotated in the appropriate Readme or Release Notes file) so that you can alert your customers to the improvements and concerns that affect their user experience.

Improvements

Mobile Device Form Factor Enhancement

Browser interviews now check device screen size on instantiation and adjust to a size appropriate for the form factor of the device on which they open.

Concerns

Browser Behavior

Mouse Wheel Scrolling Issue

When constructing Silverlight interview dialogs long enough to grow scroll bars, be aware that users of browsers other than Internet Explorer (for example: FireFox, Chrome, and all Macintosh browsers) cannot use their mouse wheel to scroll. Mouse wheel events from browsers using the Netscape Plugin Application Programming Interface (NPAPI) are not recognized by the Silverlight windowless mode used by HotDocs to support pop ups. Users of these browsers must scroll using their scroll bars, not their mouse wheels. For more information, see http://msdn.microsoft.com/en-us/library/dd759034(v=vs.95).aspx#platform_dependencies.

Silverlight Support

- On Windows, Silverlight is supported on Internet Explorer, FireFox, and Chrome
- On Macintosh systems, Silverlight is supported only on Safari

Using Safari to view HotDocs interviews

To use Safari to view HotDocs interviews you need to change a setting in your preferences. Navigate to **Safari> Preferences> Advanced**; then deselect **Stop plug-ins to save power.**

Displaying Image Dialog Elements

When using images as dialog elements we recommend resizing the image to the size required before selecting the image file as a dialog element. JavaScript interviews will re-size the image to fit in the allotted space but Silverlight interviews will crop the image to size.

Document Assembly

Problems with Text Pushing Too Far to the Left Side of the Assembled Document

Templates developed in Word 2007 with smart tags enabled can display text incorrectly. This results from a bug in Microsoft's Open XML Format SDK. If your users encounter problems with text pushing too far to the left, you should contact your template developers and have them follow the instructions for resolving this problem.

Getting Started

1. Sign up for HotDocs Document Services.
2. Receive contract order confirmation email.
3. Install or ensure installation of HotDocs Developer 10.2 or higher.
4. Receive provisioning email from HotDocs Document Services containing links and credentials to sign in.
5. Sign into the application (you must have administrative rights) to set up the account on the Settings Tab:
   - You must agree to the terms of use (page 37)
   - Apply general settings to allow firm branding and identification (page 29)
   - If you want, click **Tags** to create tag groups so you can create tags to better organize you templates (page 30)
   - Understand that charges may be incurred for adding new users (page 32)
     - Accept responsibility for charges and verify the number of users allowed for the firm
     - Add firm's users (Add any additional firm administrators at the same time) (page 32)
   - Understand that charges may be incurred for client interviews (page 35)
   - Understand that charges may be incurred for enabling template links (page 35)
   - Determine if client interviews or template links (or both) are being used for your firm
6. Download the HotDocs Configuration File (on Templates tab taskbar) to enable HotDocs Developer for template upload to your firm's Document Services site (page 24).
7. If you want, you can add a tag group to a template for faster search results (page 27).
8. If you would like to customize templates to pre-populate and synchronize with online client interviews, you need to click **Download Component File** (page 25).
9. Click **Client Interview** (on Settings tab taskbar) to create automated e-mails to clients using "tokens" you can insert from the list to the right (page 35).
10. In HotDocs Developer, enable your templates to work on HotDocs Server and Test in Browser using either Silverlight or JavaScript.
    a. Upload HotDocs Server enabled templates from HotDocs Developer to Document Services (page 25).
11. Create new clients on the Clients tab (page 20).
12. On the Documents tab, create new documents for clients (page 14).
    a. Edit user permissions for that document, as needed (page 40).

13. Click **Enable Client Interviews** to facilitate client intake through email links (page 35).
14. To reach a greater clientele, you can also **Enable Template Links** and place them on external web sites and social media pages (page 35).

Setting Up Your Site

After you create your HotDocs Document Services site, HotDocs sends you an email with the URL for your firm's new website as well as a temporary password you can use to sign in to the site.

To configure your site settings, sign in using your Administrator username (the email address registered to your account) and the password provided in the email. You are required to change this password upon signing in.

Note

If your site is ever unavailable, contact support@hddocumentservices.com or, during business hours, call: (877) 201 0150 in the US or 0870 0100 676 from the UK.

Document Services is designed to direct client correspondence to your firm. Only members of your firm, as HotDocs customers, can use HotDocs technical support. Please do not provide your clients with HotDocs Support contact information, as they will be directed to contact your firm if they have any questions.

In order to assign yourself a new password or if you forget your password, click **I forgot my password** which triggers an email with a password reset to be sent to the email address registered to your account.

Navigating Around Your Site

The main areas of your site are: banner bar, navigation tabs, taskbars, panel areas, main content, and footer.

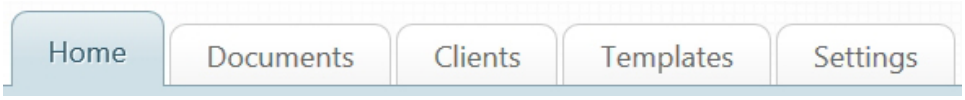
Banner Bar

The banner bar provides quick access to the **Help** menu and current user account settings, as well as the Sign Out link (on the same menu as your account settings).

- **Help Menu** - When you click **Help, t**he help menu displays context sensitive help (help relevant to the currently active area of Document Services). The Help page opens in its own browser tab to allow you to read helpful information while viewing the application content.
- **Current User Drop-down Menu**- From the user drop-down menu, you can access your user account settings, change your password, go to your HotDocs Market account, and sign out.

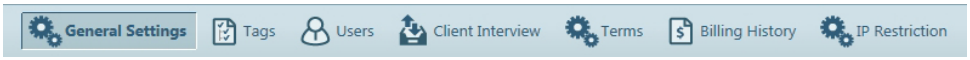
Navigation Tabs

HotDocs Document Services has been designed for easy navigation. Tabs across the top of the page provide quick access to the main areas. **Home, Documents, Clients**, and **Templates** are available to all users. The **Settings** tab is visible only to site Administrators.



Taskbars

Taskbars provide a submenu to functions available on the active page, such as the ability to create a new user or document. The submenu of the Settings tab, for example, consists of the following Administrative areas: **General Settings, Tags, Users, Client Interview, Terms, Billing History** and **IP Restriction**.

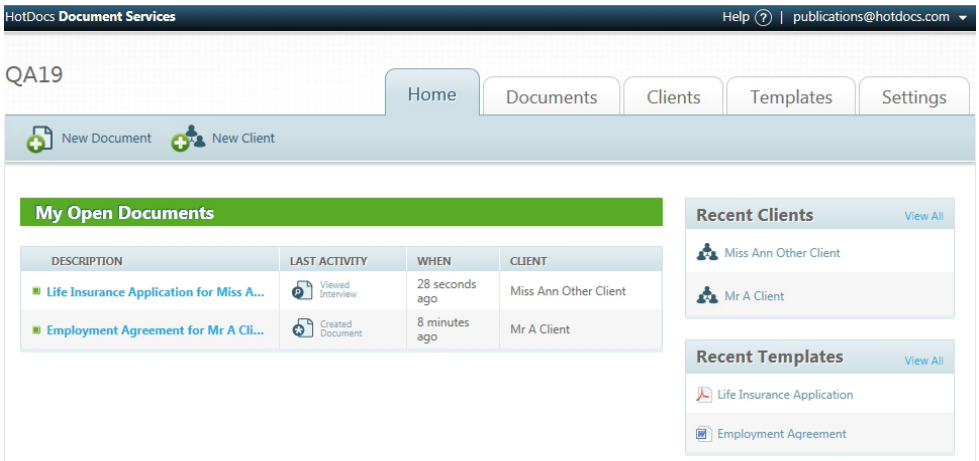


The rest of the page includes the main content area (which provides a detailed list of the prominent features for the active page) and panel areas (which are sidebars designed to provide an overview or quick access to available links or filters for that page).

The footer identifies copyright information, the **Powered by HotDocs** link to the main HotDocs website, and the **Contact Us** link for technical support.

Home Tab

The **Home** tab appears once the sign in process is complete. It acts as a dashboard of site activity for you, enabling quick access to your most recently accessed documents, clients, and templates.



Home Taskbar

The taskbar for the Home page enables creation of a **New Document** or a **New Client**.

Home Tab Main Content Area

The Home Tab's main content area contains **My Open Documents**, a list of documents that are active. For each document displayed, an overview shows the **Description**, **Last Activity**, **When** the last action was performed, and the **Client** to whom the document belongs. Only documents that have a status of **Open** are displayed. Clicking the document title in the **Description** column takes you to the edit page of the Documents tab which allows, among other things, a user to run interviews or request that a client interview be sent.

Recent Clients Panel

This panel contains a list of the most recently accessed clients. Clicking the **View All** link opens the Clients tab.

Recent Templates Panel

This panel lists templates recently accessed. Clicking the **View All** link opens the Templates tab.

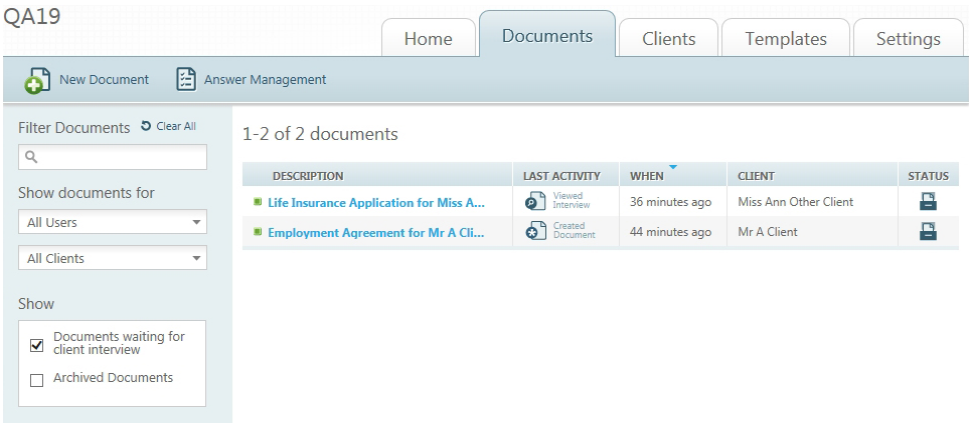
Documents Tab

If you click the **Documents** tab, the main page appears and displays a list of the documents to which you have access permissions. Conceptually, documents are similar to work items, with the goal being final document generation. Use the Document tab as your hub for viewing and managing the active documents in your firm's Document Services account.

HotDocs assembles the listed documents from interviews generated from the templates you or others of your firm's users upload to Document Services. When a user or a client completes an interview, HotDocs combines the data provided in that interview with the non-changing content in the template to create a final document.

Note

Clients can create documents when you or other firm users Request Client Interviews (page 17), or provide a link to a template from your firm's web page.



Documents Tab Main Taskbar

The taskbar for the main page of the Documents tab provides quick creation of a **New Document** for a given template, user, or client (page 14). You also have access to Answer Management (page 15).

Documents Tab Main Page Contents

The main page of the Documents tab provides a five column documents table that includes: **Description**; **Last Activity** performed on the document; **When** the activity took place; the **Client** to whom the document is attributed; and the current **Status** (**Waiting for Client Interview**, **Open**, and **Closed**).

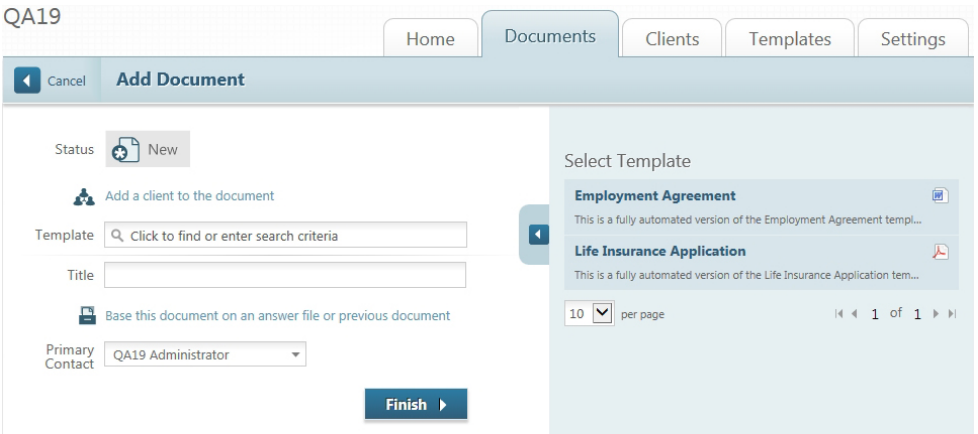
Filtering Documents Panel

The **Filter Documents** panel enables items to be searched by keywords. When typing text into the filter box, the documents table is filtered automatically as the search criteria is entered.

- **Show documents for** - allows document filtering by user and client. The default settings are **All Users** and **All Clients**.
- **Show** - allows the user to choose whether or not to include **Documents waiting for client interview** and **Archived Documents**.

Creating a New Document

When you create a new document, you need to assign a client to the document, select a template on which to base the document, and choose a primary contact for that document. In addition, you may want to base the document on an existing document, adjust the default title, etc.



To create a new document:

1. At the top of the page, click **New Document**; then, click **Add a client to the document** and select a client from the client list displayed on the right. Alternatively, click **Add New Client** at the top of the client list.
2. Next, Select the **Template** field; then select an uploaded template from the right panel or perform a search by typing part of the template name in the Template field. If you have already created tags for your templates, then clicking the arrow on the right panel reveals a list of tags that you can use to assist with filtering template results. Click one or more tags to tailor your search as needed. Clicking on **Reset** at the top of the tag panel removes all tag filters applied.
3. A default **Title for the document** is generated automatically from the selected template and client names however; this can be changed simply by editing within the **Title** field.
4. To create a new document that has components pre-populated from an answer file or a previously created document, click **Base this document on an answer**

file or previous document. You then either **Upload an answer file** or **Select a previous document** on which to base your new document.

5. **Primary Contact** is set by default to the currently signed in user; however you can choose a different user by clicking the **drop-down arrow**.
6. Click **Finish** to generate the new document. Once generated, the document appears on the Documents tab with a status of **Open**.

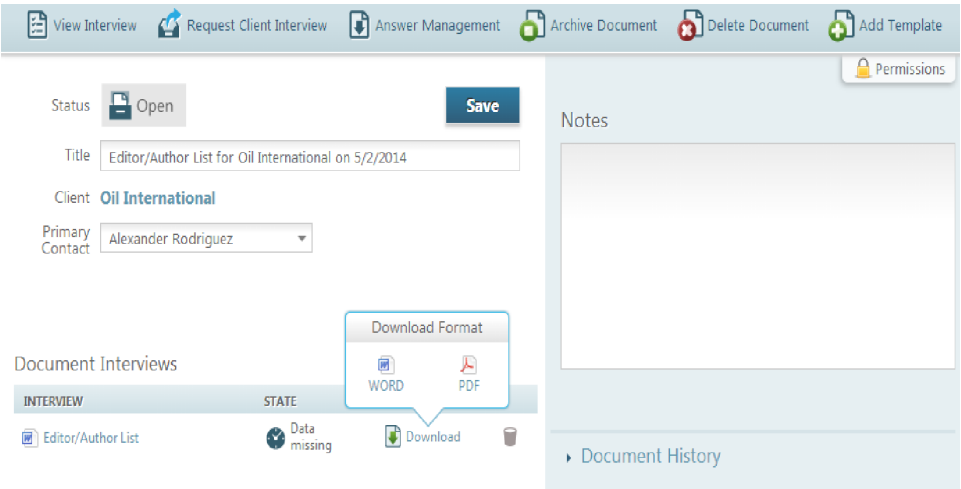
Managing Answer Files

Clicking **Answer Management** gives you the option to:

- **Upload Answer File** from your local computer or a network location.
- Link this document to a previously created or uploaded answer file. The answer file can be used to upload answers to another document, or with other HotDocs products. to pre-set interview answers when creating a document.

Documents Tab Edit Page

The Document Edit page can be accessed by selecting the document title anywhere a document is listed.



The Document Edit page provides several means to edit the data associated with a document. You can:

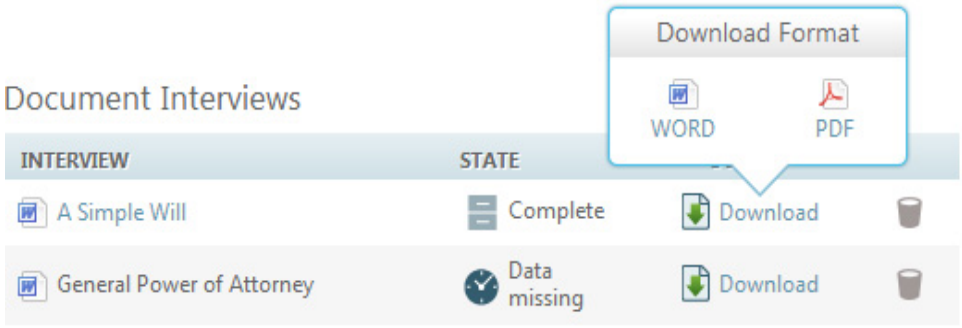
- Edit the **Title** field to change the document's title
- Assign a different user as document owner by selecting a different user from the **Primary Contact** drop-down list
- Make any notes you want about the document in the **Notes** text box at the top right of the page
- **Save** any changes you make to the Title, Primary Contact, or Notes information
- Edit the client's information by clicking the **Client** name

- View a document's history by clicking the **Document History** arrow below the Notes text box

Note

The Document History details all the ACTIVITY associated with a document, including WHEN the activity occurred and the USER who performed it.

The **Document Interviews** table in the lower left quadrant of the page displays a list of all interviews a user produces for a document.



From this table, you can:

- Open an interview by clicking the **interview** (in the INTERVIEW column)
- View the STATE of each interview (for example, is it Complete, or is there still Data missing?)
- In the OUTPUT column, **Download** the assembled document (once you complete or partially complete an interview for a document, the Download option enables, permitting you to download the document either in a Word or PDF format)

Caution

When converting an RTF or DOCX document to PDF, HotDocs uses a built-in PDF converter, which analyzes the codes contained in the word processor file and translates them to PDF. This differs from the method used by other third-party PDF converters, which rely on an instance of Microsoft Word on the server from which the document is "printed" using a driver to create the PDF document. PDF documents created using a PDF driver can typically handle a greater number of formatting variations, while the PDF conversion method used by HotDocs Cloud Services works best for documents with simpler formatting. Because HotDocs uses Cloud Services' built-in PDF conversion, some formatting differences may exist between the original word processor document and the PDF.

Note

While the default behavior of the Download feature is to provide the option to download the assembled document in the user's native MS Word format, you can restrict the download format to PDF by selecting **Force PDF Download** for this template on the Template Tab Details Page.

- Delete an interview by clicking the **trash can icon**

Documents Edit Page Taskbar

The taskbar for editing a document whose interview has not yet been completed provides quick access to the following buttons: **View Interview, Request Client Interview, Answer Management, Archive Document, Delete Document,** and **Add Template**. For a document whose interview has been completed, the list excludes Request Client Interview.

View Interview

In order to populate the document with data, the interview questions must be answered. To open the interview to input the relevant document information, click **View Interview** in the taskbar. This opens the Interview. You can then step through the questions in the **Interview Outline**, answering all that are applicable. When finished, click **Submit**, or click **Cancel** to return to the Documents tab.

Request Client Interview

If the **Request Client Interview** feature is enabled for your company and you have previously selected a client for the document, you are then able to "request a client interview," which causes Document Services to generate an email to your client requesting the client complete an interview.

To generate a Document Services email to the client requesting the client complete an interview:

1. Click **Request Client Interview**. The client interview request input appears in the right hand panel. You can edit the client details and the email before it is sent.
2. If you want, under Choose Recipient, click to select a recipient in the list of previous recipients, otherwise click **Add New Recipient**.
3. If you want, enable the client to download the finished document by selecting **Allow client to download finished interview**.
4. Once you are happy with the details and the email content, click **Send** (at the top).

Answer Management

This option is also available on the main page of the Documents tab (page 15).

Archive Document

When an interview is finished, either by a firm user or through a client interview, the document can be marked as complete by clicking **Archive Document**. This closes the document for editing and changes the status of the document to **Closed**.

If a document has the status of **Open**, the answers can be edited in the interview. If a document is archived, the document must be re-opened in order to edit any answer in an interview. This can be achieved by clicking **Reopen Document** in the taskbar. This button becomes available once a document is archived.

Delete Document

A document can be deleted by clicking **Delete Document** in the taskbar. This permanently removes the document from your firm's Document Services site.

Add Template

You can add a template to Document Services by clicking **Add Template** in the taskbar. Once the new template is added to the template list for this document you are able to assemble the document directly from the interview.

To add a template to your document:

1. From the taskbar, click **Add Template**.
2. If the list of available templates is long, in the Filter Templates box, begin typing the title or part of the description.

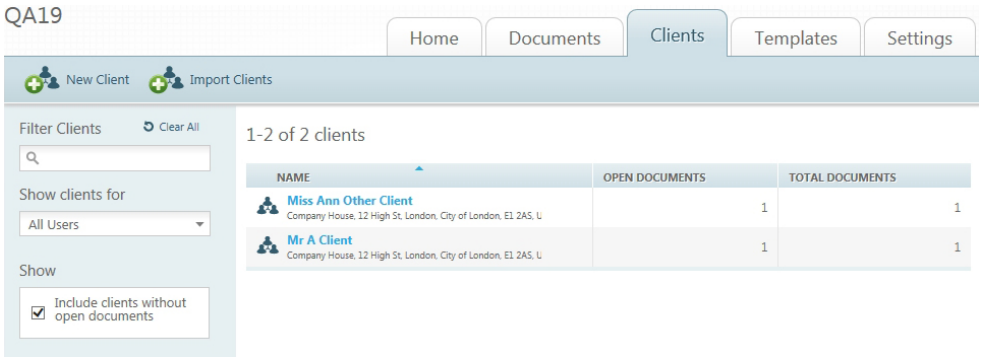
   You can also click the arrow to the left of the template list to expose the tag list panel where you can click to select a tag; otherwise, select a template directly from the template list.

   The template appears under Document Interviews. Repeat for as many templates as you want to add.
3. Click **Save**.

   If you want, click **View Interview** to check the interview flow you have created by adding templates.

Clients Tab

The Clients tab main page contains a filterable table listing all of the firm's clients and the documents assigned to each client.



Clients Tab Main Page

The Clients tab main page displays a table listing the clients for the currently signed in user. You can use the **Filter Clients** text box to filter the list of displayed clients. The clients table displays the **Name** and address of the client, the number of **Open Documents**, and the number of **Total Documents**.

Filter Clients Panel

- **Filter Clients** - enables you to search for clients using keywords. Typing a name in the **Filter Clients** text box filters the list of clients as you type.
- **Show Clients for** – allows the option to view all clients for a specific user. The default setting is to show clients for all users. You should be aware that any text left in the Filter Clients text box continues to act as a filter for the list of clients of each user you select in the Show clients for drop-down list. Removing the text removes the filtering for all users.
- **Show** - Select this check box to also show clients whose documents are not listed as open.

Note

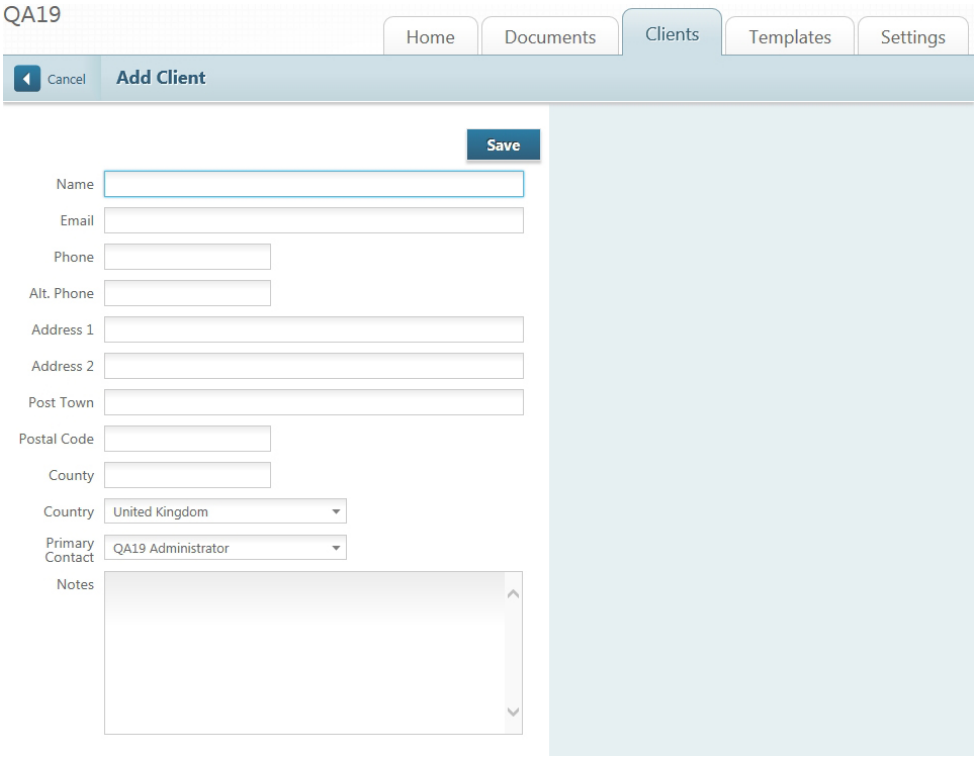
All of these components work interactively to arrive at a final display list. Changing your choice in any area affects the list displayed in the clients table.

Clients Tab Main Taskbar

The main taskbar under the Clients tab enables you to create **New Clients** (below) or to **Import Clients** (page 20).

New Client Page

Selecting **New Client** from the Clients tab main taskbar opens the new client page.

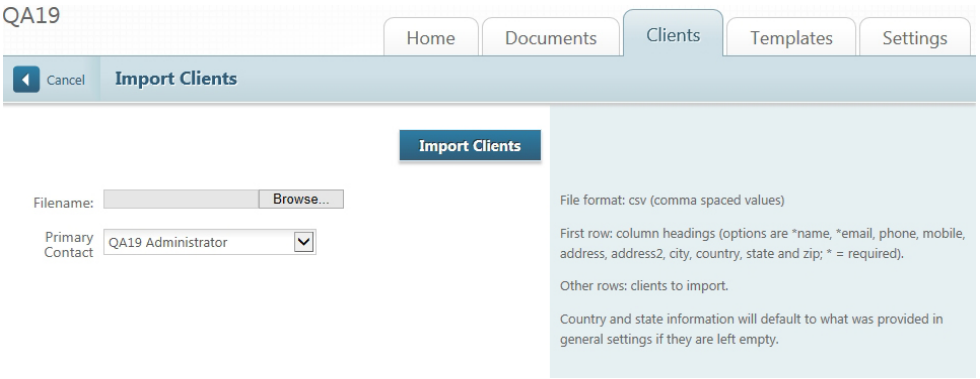


Type the client's details into the fields provided. The minimum details required are the **Name** and **Email** fields. The default **Primary Contact** for the client is the currently logged in user, however this can be changed by selecting another user from the drop-down list. Click **Save** once the details have been entered. This adds the client to the list of clients in your firm's Document Services site.

Import Clients Page

When you click **Import Clients** in the main taskbar of the Clients tab, Document Services 2.1 allows you to import a large list of clients from a comma-separated

values (CSV) file. This allows a quick way for you to populate your Document Services account with your firm's client list.



Clicking **Browse** allows you to find the CSV file you require. The primary contact is automatically set to the currently logged in user but can be changed by utilizing the drop-down list.

Instructions for formatting the CSV file can be found in the right hand panel of the Import Clients Page.

Client Details Page

Clicking on the **Name** of a client from the client table, opens the Client tab's edit page to view (on the left) the client's properties and, on the right, a **Documents** table with headings for:

- **Description**—the title you supplied when you created the document

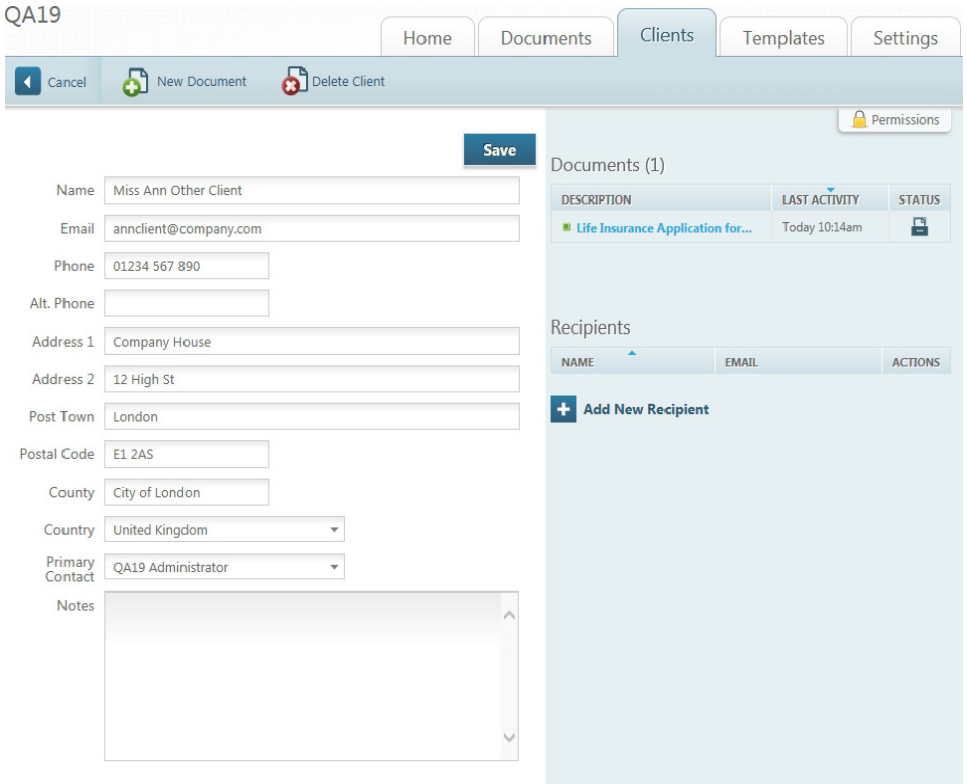
  Note

  If you leave the default title Document Services supplies when you create the document, the description provides a shorter version of the titles of the templates you add to the document, plus the name of the client (if any) you add, as well as the date on which you create the document.

- **Last Activity**—a date/time stamp of the last time anyone worked with that document
- **Status**—provides icons (and tool tips) describing whether the document is:
  - Archived
  - Open
  - Waiting for Client Interview

  You can click each column title to rearrange the display order.

Under **Recipients**, The details of these documents can be viewed by clicking on their titles.



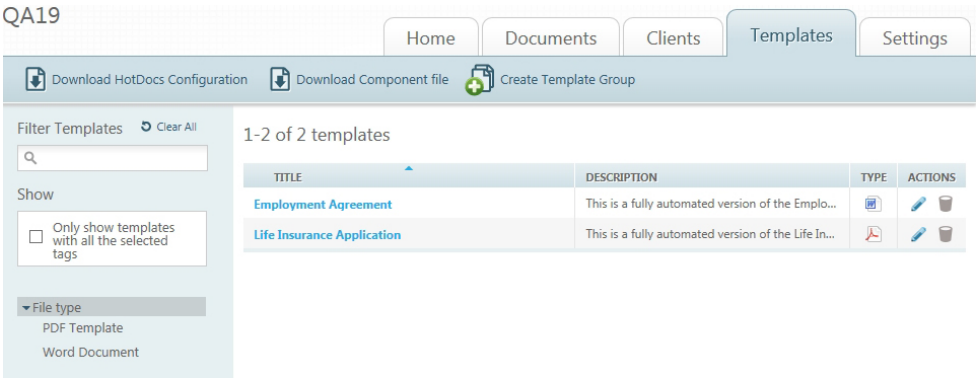
The **Recipients** are used in conjunction with the client interview feature. The recipient is the contact who can receive the client interview emails and will fill them out. Once a recipient has been added, their name and email information may be edited by clicking **Edit Recipient** in the **Actions** column. A recipient may also be deleted by clicking **Delete Recipient**.

Client Details Taskbar

The Client details page taskbar has buttons to create a **New Document** (page 14) for the currently displayed client or to **Delete (the) Client**.

Templates Tab

The Templates tab allows you to search, edit, and view the templates to which you have access. Templates are available online to HotDocs Document Services after they have been uploaded by a site administrator (only Administrators have upload rights) through HotDocs Developer.



Templates Main Page

The the Templates main page lists the **Title**, **Descriptions**, **Type** and **Actions** that can be performed for templates listed to the user.

There are two actions that can be performed on templates:

- **Edit Template** – Opens a new page which allows template details to be viewed and edited.
- **Delete Template** – Removes the template from the site.

Caution

Clicking the Delete Template button deletes the template for all users.

Filter Templates Panel

The Filter Templates panel contains the following options:

- **Filter Templates**—Enter text in the search field to filter the template list by title. It filters automatically as search criteria is entered into the box.
- **Show**:
  - If you have chosen to **Enable Template Links** (on the Settings tab when you click **Client Interview**) you are able to filter the results to show **Templates with active links** only by selecting the check box.
  - Tags can also be used to filter templates in the main content area. Tags can be selected and de-selected from the list just below the Show box. If you want to see only templates that have all of the selected tags, select the box next to **Only show templates with all the selected tags**.

- Click **Reset** at the top of the panel to remove all filters and display all templates.

Templates Main Taskbar

The Templates tab main taskbar contains the following options:

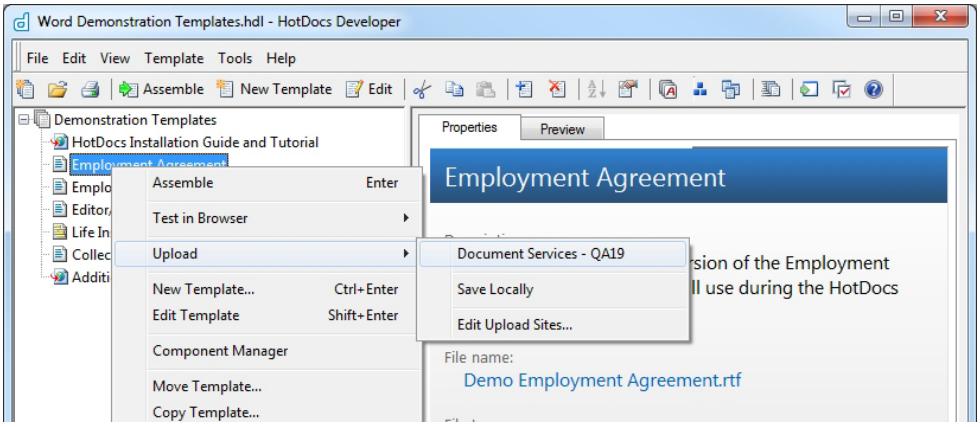
- **Download HotDocs Configuration**—Click to download a HotDocs Developer configuration file that enables HotDocs Developer to list Document Services as a template upload site (page 24)
- **Download Component File**—Click to download a component file (for use in Developer's Component Manager) with variables that map data from HotDocs Document Services into templates you build in Developer (page 25)
- **Create Template Group**—Click to create a group of templates whose order determines the order in which Document Services assembles the corresponding documents and presents the associated interviews (page 26)

Downloading the HotDocs Configuration File

The HotDocs configuration file enables you to configure HotDocs Developer to upload templates from any HotDocs Developer template library to your Document Services site.

To configure HotDocs Developer for uploading templates to Document Service:

1. Click **Download HotDocs Configuration.**
2. Use the standard procedure for your browser to open the config file.
3. When the HotDocs Upload message appears, you may want to copy the publish information for your own reference later. Click **OK**.



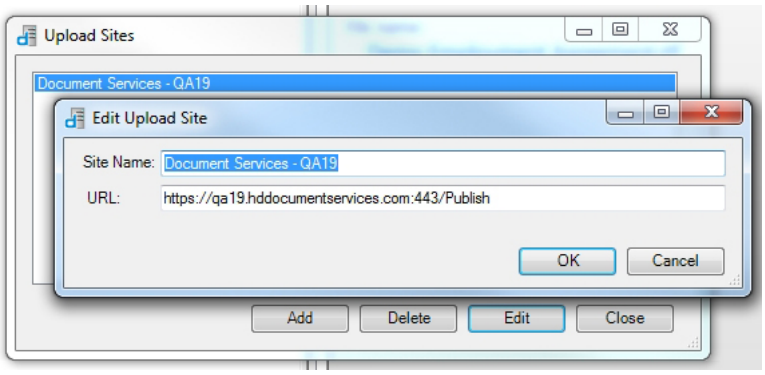
4. To upload a template, follow the steps in Uploading a Template (page 25).

Manually Configure Template Upload Settings

You can manually configure HotDocs Developer to upload templates to your firm's Document Services site.

To manually configure HotDocs Developer for a template upload:

1. In HotDocs Developer template library, right click any template and select **Upload** > **Edit Upload Sites...**
2. Click **Add** and then provide a **Site Name**.
3. In the **URL** text box, type the full secure site URL given to you in the site confirmation email, and then add a forward slash and the word *Publish,* as in the following example: *https://yoursitename.hddocumentservices.com/Publish*



Uploading a Template

Once you have configured HotDocs Developer to upload templates to Document Services (whether manually, or by downloading the configuration file), you can upload templates to your firm's Document Services site.

1. In HotDocs Developer right-click a template; then select **Upload** > *your Document Services site*.
2. Click **Upload**.
3. Provide your sign-in credentials and click **Sign In**.
4. If you want, edit the existing template properties (Title, Description, Primary Contact), or add more by adding tags (page 27) to the template from the tag groups to right. When you are finished, add the template to your site by clicking **Save Template**.

Download Component File

The component file download consists of specific HotDocs Document Services component fields that appear in the HotDocs Developer Component Manager after download. You can create new templates with these fields or modify existing templates with these components to enable interviews to maintain continuity and be pre-populated with applicable data.

Note

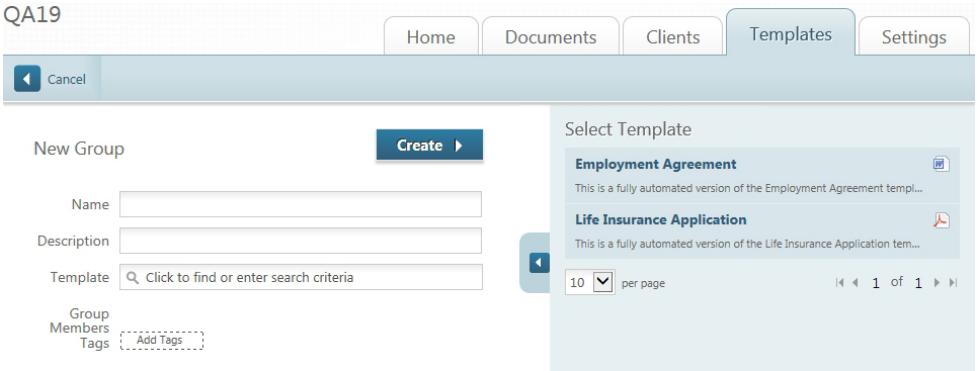
Only site Administrators can download component files.

Create Template Group

You can group related templates in a logical series; Document Services assembles the documents in the same order as you group your templates so template users experience your template group as a single template.

To create a template group:

1. Click **Create Template Group**.
2. The **New Group** page appears. **Name** your group, and add a **Description** for your group.
3. Add the templates you want in your group, either by clicking templates in the template list to the right or by typing a template name in the Template box.
4. If you want, click **Add Tags** to help identify your template group.



Note

When Document Services creates a new document from the group, the interviews are presented in the order you added the templates to the group.

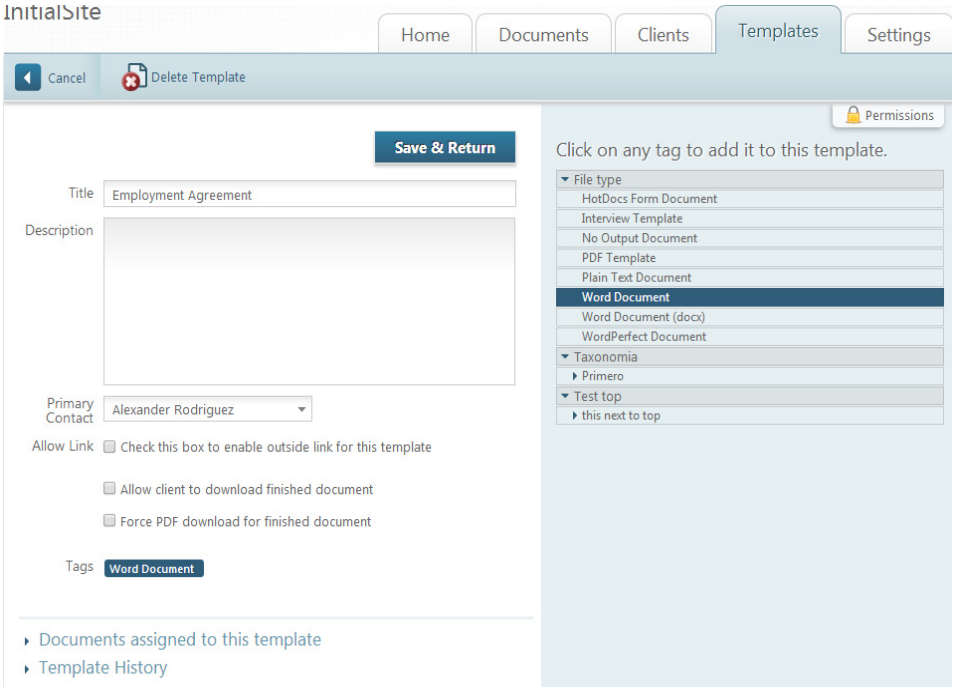
Template Tab Details Page

You can access a template's properties details for editing from the main page of the Template tab.

To edit a template's property details:

1. On the main page of the Templates tab click **Edit Template**.
2. On the details page that appears, edit the template's properties as needed. You can:
   - Change the **Title**, and **Description** by editing the appropriate text box.

- Click the **Primary Contact** drop-down arrow to select a different primary contact.



- If you previously enabled template links, you can select **Allow Link** to display the URL to the template. A firm user can then copy the link and display the link on an external website.
- Decide whether to **Allow (a) client to download (a) finished document from the current template**
- Decide whether to select **Force PDF download for finished document**

Caution

When converting an RTF or DOCX document to PDF, HotDocs uses a built-in PDF converter, which analyzes the codes contained in the word processor file and translates them to PDF. This differs from the method used by other third-party PDF converters, which rely on an instance of Microsoft Word on the server from which the document is "printed" using a driver to create the PDF document. PDF documents created using a PDF driver can typically handle a greater number of formatting variations, while the PDF conversion method used by HotDocs Cloud Services works best for documents with simpler formatting. Because HotDocs uses Cloud Services' built-in PDF conversion, some formatting differences may exist between the original word processor document and the PDF.

Note

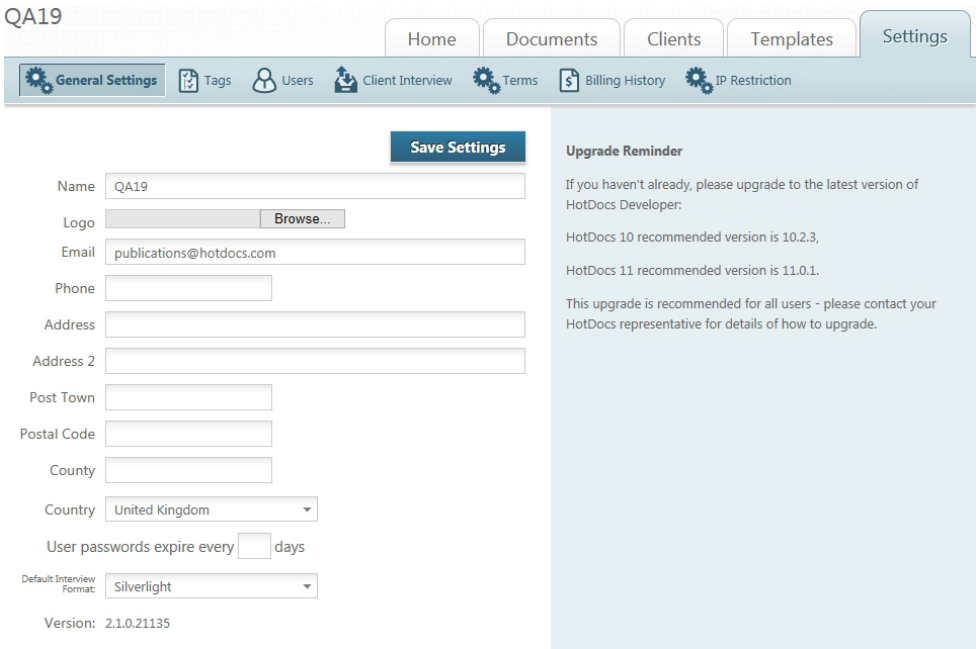
While the default behavior of the Download feature on the Documents Tab Edit Page is to let the user choose between Word or PDF, you can restrict the download format for individual assembled documents by selecting **Force PDF Download** here.

- You can also assign and remove tags by selecting and de-selecting **Tags** from the tag groups on the right.
- If you want, click **Documents assigned to this template**, to review the Title, the Client assigned to the document, and the Status of the document.
- Likewise, click **Template History** to review the actions taken with the template.

3. Once you are finished making changes, at the top of the main panel, click **Save & Return**.

Settings Tab

The Settings tab is only available to site Administrators. From here you can modify firm details, customize tags, edit users, modify client interview settings, view terms, see the current billing history and modify any IP restrictions.



Settings Tab Main Page

The **Settings** tab allows the Administrator to set firm branding on the site, including the firm name, logo, and contact information that allow your clients to identify and contact your firm.

There is no requirement to add a logo and if you choose not to do so, your firm name is used in place of the logo.

Enter the following details (Details marked with ** are required in order to save the settings):

- **Name** - Enter the name of the firm. **
- **Logo**– Select your firm logo image file.
- **Email** - Enter the contact email of the firm. **
- **Phone** - Enter the phone number of the firm.
- **Address/Address 2** - Enter the address of the firm.
- **City** - Enter the city the firm is located.
- **Zip** - Enter the Zip Code (for UK users this will be Post Code).
- **State/Province** - Enter the state the firm is located (for UK users this will be County).
- **Country**- Select the country from the drop-down list.

Below the company details an Admin user is able to set how often user passwords will expire, select the default interview format, and view the version number of HotDocs Document Services.

Once all details have been entered, click **Save Settings**. The firm image will be added to the top left of the page. If an image is not uploaded, only the firm name will appear in the upper left header.

Note

Only site Administrators can modify 'General Settings'.

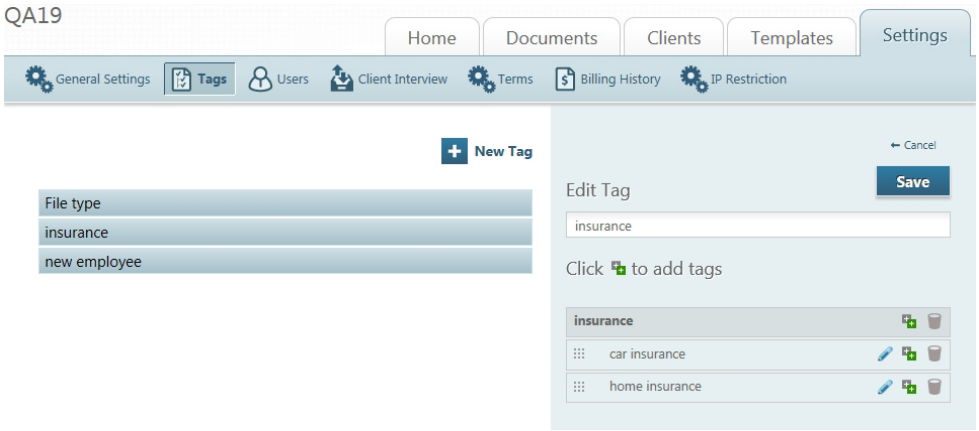
Settings Taskbar

The Settings tab main taskbar allows quick access to **General Settings, Tags, Users, Client Interview, Terms, Billing History**, and **IP Restrictions**.

Tags Settings Page

Clicking Tags on the Settings taskbar causes the tags page to appear. The tags page allows uploaded templates to be grouped by type or category to facilitate searches for site users.

Tags created for your site are located in the main content panel. Tag (group)s can be collapsed or expanded to view the various tags assigned to them. Tags are for convenience only and do not need to be assigned to any templates.



Adding a New Tag (Group)

Adding a new tag (group) creates a top level entry under which you can add multiple related tags.

To add a new tag (group):

1. Click **New Tag** and enter the tag name you wish to use.

2. Click **Save** and the new entry appears in the tag list.

Adding a Sub Tag

The main tags displayed cannot be assigned to templates. However sub tags can be added to the main tag groups. You can assign these tags to individual templates, or to template groups (see Template Tab Details Page).

To add a sub tag:

1. Click the tag that you would like to add a sub tag to. The tag settings appear on the right of the page.
2. Click **Add Tag** beside the tag name highlighted in grey. A text box appears, enter the sub tag name and click the plus button. The sub tag is added to the tag.

Removing a Tag

If you decide a previously created tag does not properly describe any templates, you can delete the tag.

Caution
Deleting a tag group deletes all sub tags in that group.

To remove a tag:

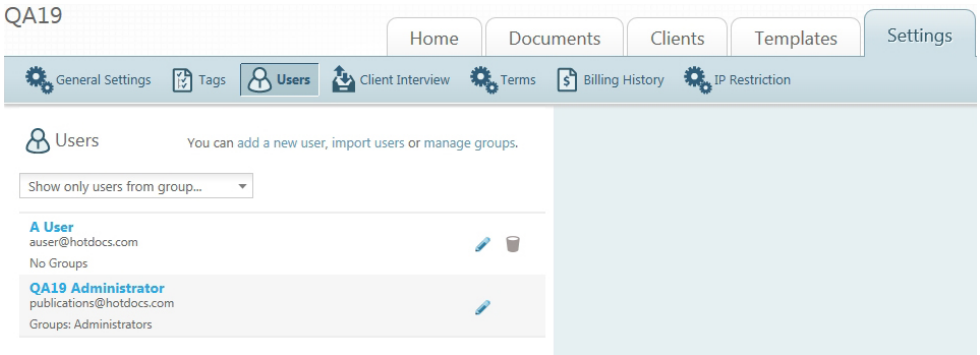
1. Select the appropriate tag,
2. Click **Delete**.
3. A prompt appears asking for confirmation to delete the item. Click **Yes**.

Users Settings Page

Clicking Users on the Settings taskbar causes the **Users** page to appear. The links to the right of the Users title provides the Admin user with the option to:

- **invite a new user** (page 32)
- **import users** (page 33)
- **manage groups** of users (page 33)

From here it is also possible to edit and remove site users by clicking the respective Edit and Delete icons to the right of each user name.



Types of Users

There are two types of user:

- **Users:** The standard user type only has access to the standard application functionality. All access to the settings features is disabled for users. By default, this is the type of user created unless the **Administrators** option is selected on creation. Unless administration settings are required users should be of this type.
- **Administrators:** Members of this group can act as the firm's administrator for the application. Administrators have access to all available settings for the application.

Invite a New User

To add a new user:

1. Click **Invite a new user**, the user information input appears on the right of the screen.
2. Enter the relevant user details into the fields provided.
3. If the user being created is an Administrator, you need to add the user to the Administrators group using the **Groups** drop-down list. If you do not add the new user to this group, then a normal user is created.

   To exempt a user from the IP Restriction feature (if you have set one), i.e. for a travelling user, select the **Allow user to login from any IP** check box.

   Note

   This option is only available if you have first clicked IP Restriction in the taskbar, then selected **Enable IP Restriction** and **Save Settings**.

4. To finish the process, click **Invite User**.
5. When you create a new user account, your organization may incur additional charges for the new user if the number of active users exceeds the contracted

number of users. To authorize the charges click **Yes**. The user is added to the application.

Note

Not all details must be entered to create a user. Only the Name, Email and password fields are mandatory; however, it is recommended that all fields are entered.

Edit User Details

You can edit a user's account details any time you need to adjust permissions, change a password, etc.

To edit user account details:

1. Click the user's name or **Edit User**; the user account details appear on the right of the screen.
2. Edit any of the user details fields as needed:
   - The user is responsible for managing further details, including their password, through their HotDocs Market account.

Import Users from a CSV file

If you require adding a large amount of users you have the ability to create multiple users using a CSV file.

To import users:

1. Click **import users**, the import setting are shown to the right.
2. Click **Browse** to locate the CSV file that contains the user details.
3. Click **Submit** and the users are imported.
4. The additional charges confirmation appears. To accept these conditions click **Yes**.

Note

Information on how to format the CSV file is visible on the right-hand panel of the import page.

Manage Groups

The manage groups link gives you access to functionality for both managing existing groups and creating new groups.

To manage groups:

1. To view the groups page click **manage groups**.
2. Click **Edit** next to the group names to edit, assign users or groups or click **Delete** to delete a group.

When editing a group you have the option to **Set up Default Permissions** (page 34).

Creating a New Group

You can set access rights and permissions on an entire class of users all together by adding these users to a user group.

To create a new group:

1. Click **Add a new group**, the group information appears on the right-hand side of the screen.
2. Fill in the name and description, then select users and existing groups you would like to add to the new group.
3. To finish click **Create Group**.
4. To return to the Users page, click **manage users**.

Default Permissions

Document Services 2.0 introduced a permissions system (accessed from a **Permissions** drop-down tab in the relevant edit page) designed to restrict access to documents, templates and template groups.

With Document Services 2.1, you can set default access permissions that are applied to new items created by users in groups you specify using the new default permissions feature.

Using this feature, any new item created by a member of the group inherits the default access permissions when that item is created. This removes the need for users themselves to handle the task of setting access rights.

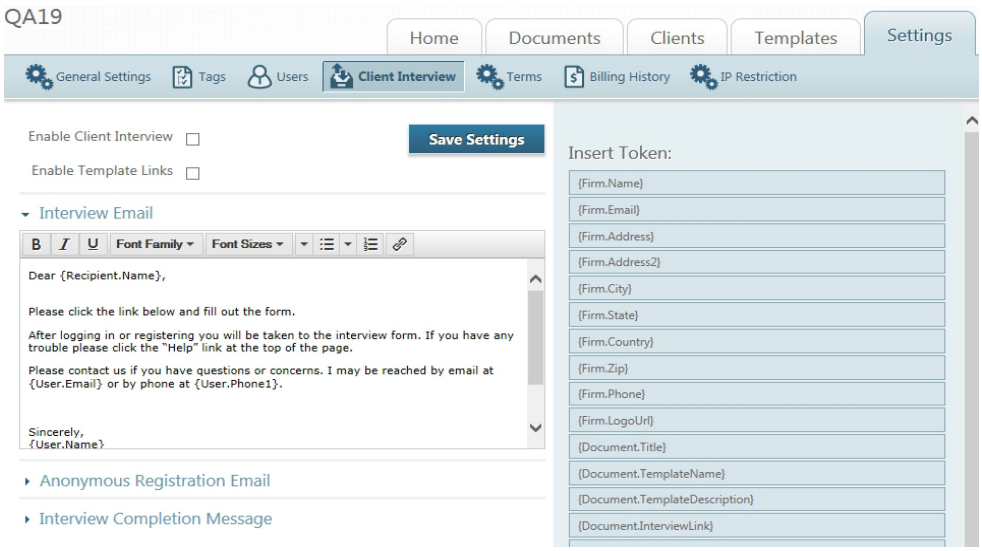
To enable default permissions for a group:

1. On the Settings tab, click Users; then click **manage groups**.
2. Click either **add a new group** (just across from the Groups label, or click **Edit group** (the pencil icon next to each group name) to edit your chosen group.
3. Next, click **Set up Default Permissions for this Group** to view the default permissions options.
4. Click the appropriate **drop-down arrows** to select **Groups** and **Users** to add to the default permissions for this group.

   By default, the individual users and members of the groups you select are the only users who can access the items they create. However, any member you add to the default permissions can manually change permissions for an item by clicking the **Permissions** tab (located just under the right side of the taskbar when editing an item's settings).
5. Click **Save**.

Client Interview Settings Page

This Client Interview settings page lets the Client Interview feature be turned on, allows for template links and enables the customization of client interview correspondence.



The **Enable Client Interview** feature allows a client to fill in the interview by emailing them a link to the interview page. The client will click the link, log on or register as a client user (if not registered already) and fill out the interview. Once the interview has been completed, the document is then ready for download.

Note

Client Interview is not currently available when you use templates from HotDocs Market

Enable Client Interview

You need to enable client interviews in order for any email requests to be sent. To do this select the **Enable Client Interview** check box. Enabling a client interview may cause your organization to incur additional charges. Please contact your HotDocs sales representative for questions about pricing and options.

Enable Template Links

You can also choose to enable template links, which gives you the opportunity to allow clients to initiate the document creation process themselves.It allows links to be created to interviews where the client needs to sign in or register and complete the interview. Enabling template links may also cause your firm to incur additional charges because each time a client submits an interview using such a link your firm's billable history increases.

To enable template links:

1. Click the **Settings** tab.
2. Select **Enable Template Links**.
3. Click **Save Settings**.
4. Click the **Templates** tab.
5. To the right of the template you want enable for an outside link, click the **Edit** icon (the pencil).
6. Below the Primary Contact drop-down list, select **Allow Link**.
7. Just below, click the icon to copy the template link to your clipboard.
8. At the top of the page, click **Save & Return**.
9. Embed the link in your firm's external website to enable clients who visit your web page to register with your firm and complete the interview. Billable transactions accrue to your firm's account for each interview submitted using this link.

Customize Client Emails

There are three types of client email available to customize:

- **Interview email:** This is the default email that is sent to a client when you request for them to fill out an interview. This email can be customized here or in the Documents edit page when requesting a Client Interview for a given document.
- **Anonymous Registration email:** This is the email clients receive when they register, to fill out a client interview, for the first time.
- **Interview Completion Message:** This is the email that is sent to a client once they have completed a Client Interview.

All the emails can be customized through the text editor provided. Common text customizers, such as: Font, Size, Bold etc., are provided. There are other generic parts, which can be added to the text of the emails, called tokens.

Adding a Token

Tokens are like textual short cuts that act as place holders for the actual content you want to include in the email. This content replaces the token when the email is generated.

To add a token:

1. Place the curser where you want the token to be displayed.
2. Click the token from the token list. It is added to the document.

Adding Your Firm's Logo

The Interview Email can contain the firm's logo at the end of the email (a firm's logo must be uploaded in the general settings tab for this to be available). Click the

{ **Firm.LogoUrl** } token to add the logo in the desired position. This adds the placeholder to the email body. The logo will be added to the email when a Client Interview email is created

Terms Settings Page

The terms page contains the Terms of Service that all users must agree to before gaining access to the application. When a user logs into the system for the first time they are prompted to accept these terms.

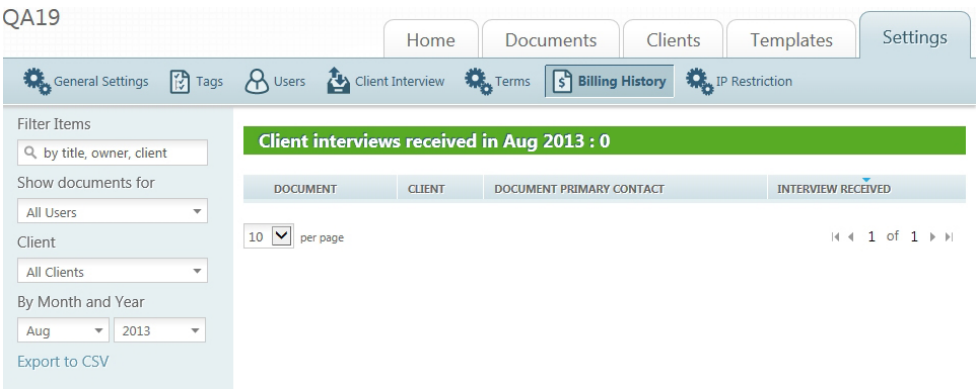
Billing History Setting Page

The Billing History page displays a list of submitted client interviews. HotDocs bills your company for the submitted interviews associated with your firm's account, regardless of whether your firm's internal users or external clients submit the interviews.

By default, the Billing History page displays a table containing the ten most recent interviews your firm's clients and users submitted during the current month. This includes any client-initiated interviews submitted using template links embedded in your firm's website. You can change the number of interviews displayed using the **per page** drop-down list just below the table.

The table has the following columns:

- **Document**—lists the document used to create the interview
- **Client**—names the client that submitted the interview
- **Document Primary Contact**—displays the name of the user that is the primary contact for the document template used to generate the interview
- **Interview Received**—gives the date a user or client submitted the interview and up-loaded to Document Services



Searching for and Exporting a Billing History:

Like many of the other search facilities provided by HotDocs Document Services, the list of currently displayed client interviews for which HotDocs bills your firm can be filtered and sorted according to the search categories given in the panel to the left of the client interview table.

To filter the list of submitted client interviews:

1. Type the document title, owner or client into the **Filter Items** search box; the list of submitted interviews displayed in the history list automatically filters as the search term is entered.
2. If the list of search results is too large, click the **Show documents for** or **Client** drop-down arrows and select a specific user or client
3. You can also click the **Month and Year** drop-down arrows to filter by month and year. Selecting **ALL** from the month list shows all the billing history for the selected year.

   Note

   You can use these filters in any order to achieve your desired search results, for instance if you filter by year prior to typing a document title into the **Filter Items** search box, the items returned are for the year you specified.

4. Once you have located the client interviews you are looking for, click **Export to CSV** to download a CSV file of the search results.

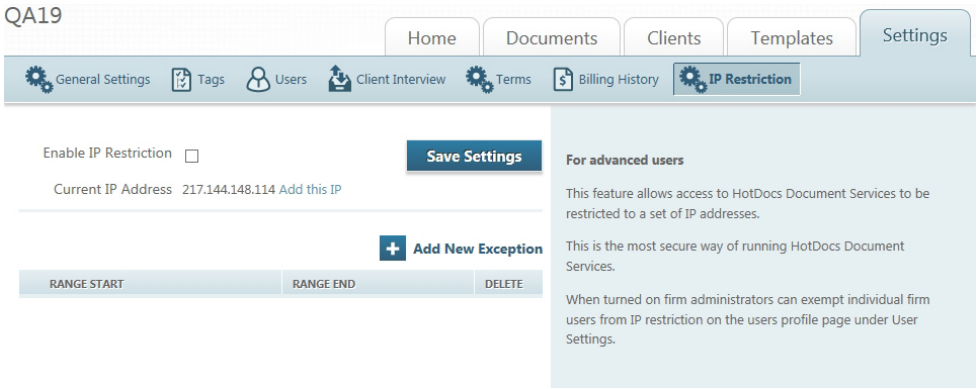
   Note

   You can set the order of the data in the CSV file by clicking individual column headers before clicking Export to CSV. For instance, if you want to arrange the data by date, you should click the **Interview Received** column header before clicking **Export to CSV**. Doing so ensures that your downloaded CSV lists the client interviews by date.

IP Restriction Setting Page

The IP restriction settings page gives site Administrators the ability to provide another layer of security to Document Services. Specific IP addresses or IP address ranges can be added to a list of allowed IPs. This requires a subscribed user to be located at a specific IP to access data on the service.

Specific users can be exempted from the restriction to enable travelling users to access the service from outside the allowed IP addresses / ranges.



To enable the IP Restrictions select the box at the top of the main panel then click **Save Settings**.

Note

Document services does not allow the IP restriction feature to be enabled if doing so means that the current user would be locked out. In this case, before you click **Enable IP Restriction**, you must add your current IP by clicking the **Add this IP** link to the right of the address in the Current IP Address field.

Adding a New Allowed IP Address or Range

When you select **Enable IP Restriction**, your firm's registered users cannot access Document Services except from the IP addresses you specify; however, clients responding to a client interview request or clicking a template link embedded in your firm's website are unaffected by this IP restriction.

To add a new allowed IP address or range:

1. Click **Add New Exception**.
2. In the New Allowed IP panel on the right, type a **Specific IP** in the corresponding text box, or select **Range** and the Floor and Ceiling text boxes.

   When assigning an IP range please note that the most significant digits will determine whether an IP meets a range or not.

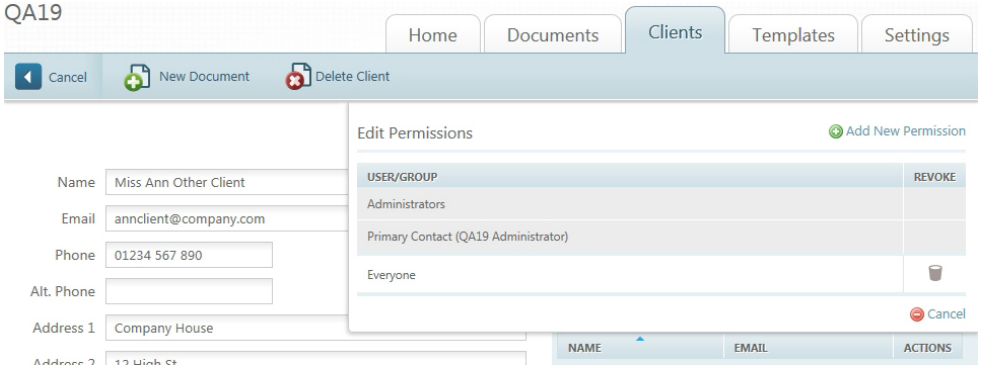
   Examples:

   - 100.0.0.1 - 100.0.0.10 would allow the 10 addresses between these IPs to access Document Services.
   - 120.0.1.1 - 120.0.10.255 would allow all 255 addresses in all 10 of the 120.0.x networks.
   - 140.0.1.128 - 140.0.2.127 would allow 255 addresses between the bottom and top range.

   If you require stricter IP restrictions, please use multiple rules.

Edit User Permissions

You can find the **Permissions** drop-down tab on the Document Details, Client Details and Template Details pages. User permissions are applicable on an item by item basis. The process of adjusting permissions is the same whether you are altering permissions editing permissions for a document, client, or template.



To edit permissions:

1. For a document, client, or template, click the **Edit** button (pencil icon) to the right.
2. Click the **Permissions** tab at the bottom right of the taskbar. To add editing permissions for a user or group, click **Add New Permission**; then either click the **drop-down arrow** to a select a user or group, or click **Browse** and make a selection from the list that appears in the slide out panel on the left.

Note

By default, the panel displays a list of groups. To access a list of individual users, at the top of the panel click **Show Users**.

- To revoke a user or groups editing permissions, to the right of the group or user name, click **Revoke**.

Contact Us

Contact Us links are available in the footer throughout the application to request support or ask questions.

- Clients who use the Contact Us form will have their emails submitted to the Administrator assigned to the document or template.
- Administrators will have their 'Contact Us' forms sent to the HotDocs Support Team for HotDocs Document Services.

If a client cannot sign in, they are offered a link to **Register** if they are new to the firm or a **I forgot my password** link, if they believe they are already a client at the firm. A **Contact Us** link is also available on the sign in screen to send a request for support from the firm.

Online Help

Online help is available within the application. The Help link, available on the banner bar, opens with information applicable to the page on which it is clicked.

All buttons and functions available on an application page are addressed within the Help screen.

Contacting HotDocs Limited Customer Service

Experienced HotDocs consultants are available to help you with a variety of services, including integrating HotDocs with other products, building a template library, or providing training. Please contact us using any of the following methods.

In the United States:

HotDocs Corporation
387 S 520 W, Suite 210
Lindon, Utah 84042

(800) 500-3627 (Sales)
(801) 615-2200 (Business)
+44 131 226 3999 (International)
(877) 356-3627 (Fax)
(801) 868-3627 (International Fax)

sales@hotdocs.com
www.hotdocs.com

In the European Union:

HotDocs Limited
14 South Charlotte Street
Edinburgh, EH2 4AX
Scotland

0131 266 3999
+44 131 226 3999 (International)
0131 220 9024 (Fax)
+44 131 220 9024 (International Fax)

info@hotdocs.co.uk
http://www.hotdocs.co.uk

HotDocs Information on the Web

You can access other information about HotDocs by visiting the HotDocs website: **http://www.hotdocs.com**. At this site, you can:

- Participate in the HotDocs user forums.
- View the HotDocs Wiki page.
- Find information about the different HotDocs products and services that are available.

Documentation Feedback

To improve the quality of the tutorials and the help files, we invite you to make comments or suggestions. When doing so, please include as much information about your experience using the documentation as possible. For example, include which version of the product you are using, as well as whether your suggestion is in regards to a printed help document or an electronic help file. If commenting about a specific topic, include that information as well.

Note

Please keep in mind that we cannot respond to technical support or project consulting issues. We are mainly interested in problems with the documentation itself—such as erroneous information, grammatical and spelling errors, or suggestions for topics to include in the next release of the software.

E-mail your comments and suggestions to **publications@hotdocs.com.**