



# Publisher Onboarding Kit



## Publishing, Supporting & Selling HotDocs Market Templates

A HotDocs Market publisher's guide for loading templates, answering customer questions and generating royalties  
March 2015

**PUBLISHER ONBOARDING KIT**

[support@hotdocsmarket.com](mailto:support@hotdocsmarket.com)

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# Introduction

## What is HotDocs Market?

Welcome to HotDocs Market! The following reference manual will guide you through the process of loading your templates to HotDocs Market, developing products, answering customer questions and various other features of HotDocs Market. For a quick overview of HotDocs Market, we invite you to view this 1 minute video: [HotDocs Market](#).

As a HotDocs Market publisher, not only do you have access to all of the same HotDocs Market features as a subscriber, but you also have your own dedicated publisher portal.

Should you require assistance in accessing or implementing any of the tools or features in HotDocs Market, please feel free to contact us by email or phone:

- Phone: +1 (844) 536-4343 for Customer Support (Monday - Friday from 9 am - 8 pm (EST / EDT))
- Email: [jonathan.hoy@hotdocs.com](mailto:jonathan.hoy@hotdocs.com)

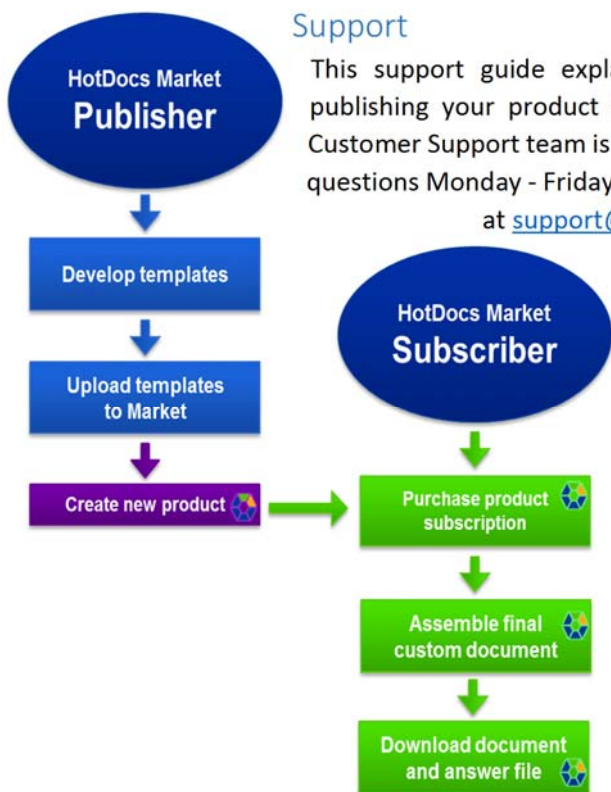
## Publisher Access

You can access HotDocs Market through the dedicated Publisher Portal, which is tailored to focus on your needs as a publisher. Within the portal, you can publish products, update pricing and product details, manage your publisher team, view reports about product purchases and usage, and more.

## Support

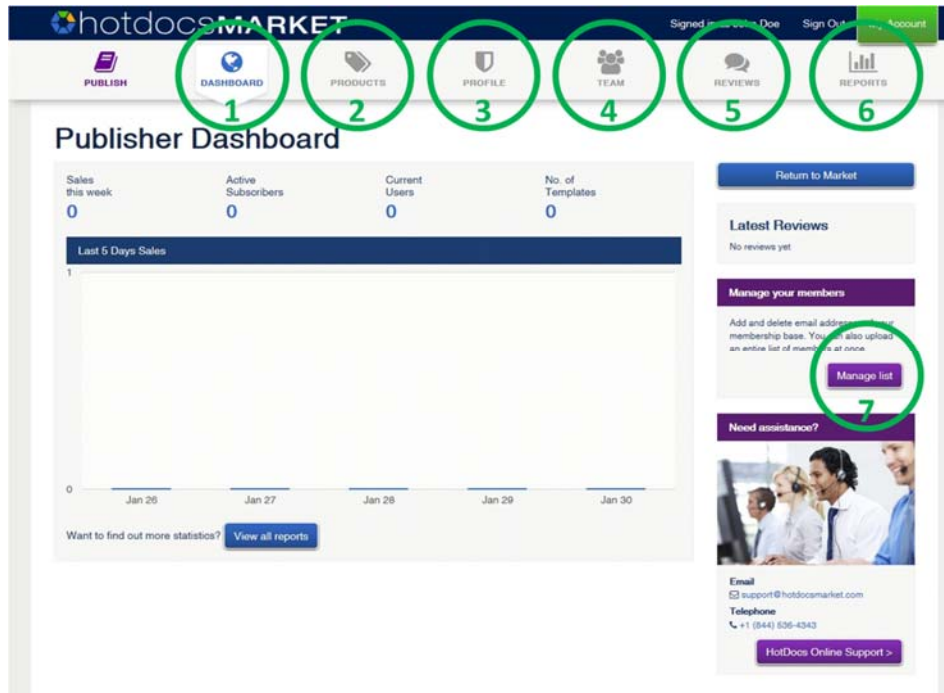
This support guide explains the HotDocs Market publisher experience – from publishing your product to tracking and managing your subscriber activity. Our Customer Support team is available to assist both publishers and subscribers with any questions Monday - Friday from 9am - 8pm (EST/EDT) at 1 (844) 536-4343 or by email at [support@hotdocsmarket.com](mailto:support@hotdocsmarket.com).

You may also find our subscriber support useful as you launch your products on Market and engage both current and new customers. A Subscriber Onboarding Kit is also available for you to access and share with end users.



## Getting Started, Publisher Portal

Accessing the HotDocs Market website is easy; simply navigate to: [www.hotdocsmarket.com](http://www.hotdocsmarket.com). When you sign into HotDocs Market as a publisher, you are brought to the dedicated Publisher Portal. This portal provides you with access to a comprehensive range of features, including managing your products, updating your publisher profile, organizing your publisher team, and tracking your products through user reviews and usage reports.



### 1-Dashboard

The Publisher dashboard page is the default landing page within our dedicated Publisher Portal. This Dashboard provides you with a snapshot of statistics for your product(s): number of active subscribers, current users, and the number of templates available. It even shows you your most popular product and template.

### 2-Products

The Product page provides a list of all your products within Market. By clicking a product name, you are shown individual product detail pages that detail your subscribers, pricing information, product description, and user reviews.

### 3-Profile

The Profile page enables you to manage the information you share about your organization. You can update your public profile, phone number and website details – and even add URLs to your organization’s home page. This is also where you can make changes to private details about your organization that are shared only with HotDocs.

### 4-Team

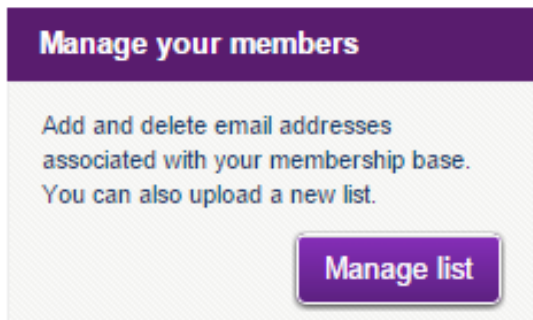
Many publishers have more than one person administering / supporting their products. You can add and remove Team Members within HotDocs Market to conduct business and publishing activities on behalf of your organization.

## 5-Reviews

Users who have active subscriptions are able to post product reviews. From the Reviews page you can see all reviews for your products. You can also reply to subscriber reviews.

## 6-Reports

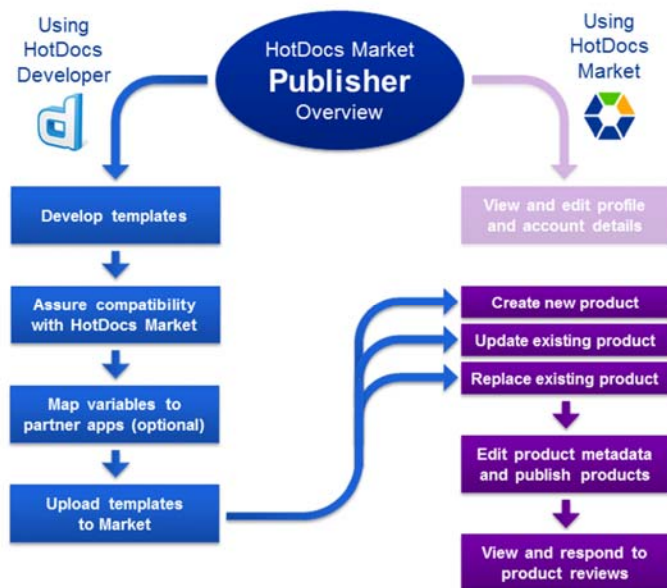
On the Reports page, you can select from your list of products, and then dive into the details for a specific product. If you do not see the reporting combinations you are looking for, please contact us to let us know what you would like to see.



## 7-Members

For organizations that have a membership base (e.g. State Bar Association), we enable you to identify your members using their email address. You can upload a list of email addresses for your members either from the dashboard or on your profile page, at the 'Manage your members' prompt on the right hand side of the screen, click **Manage list**.

## Publishing Overview



HotDocs has made it easy to create, load and publish HotDocs templates from your HotDocs Developer account. Here's how:

### Connecting with Market

1. Sign into HotDocs Market with your Publisher email address and password (which are sent to you once the license agreement is signed) to access the Publisher Portal.

**Create a new product**

You need to use the HotDocs Developer upload plugin to upload a product to the HotDocs Market.

After you download the configuration file, open HotDocs Developer and right click on the template you want to turn into a HotDocs Market product.

Click on Upload and click on HotDocs Market. Follow the instructions in the upload window and your new product is available under the New tab in the Product List when you finish.

[Download Configuration File](#)

2. Download the HotDocs Developer Configuration File. Go to the **PRODUCTS** tab of the Publisher Portal, look for the 'Create a new product' section on the right hand side of the page. Click **Download Configuration File** and follow the instruction in the browser window.

3. Once your templates are ready, you can use HotDocs Developer to upload your completed template(s) to HotDocs Market.

## Prepare a Template for Upload

By default, templates you create in HotDocs Developer are enabled only for desktop use. You need to enable your templates for online use before you upload them to the HotDocs Market.

### *To enable a template for Market*

1. Open HotDocs Developer on your computer.
2. Right click on the template you want to enable.
3. Select **Test in Browser** then select **JavaScript**.
4. If a warning message appears, then the template is not yet web-enabled. Click **Enable**.

**Note:** If the template has already been enabled, the Enable window does not appear; click **Cancel**.

5. On the Answer File dialog, choose a new or existing answer file then click **OK**.
6. Test that the interview is running as expected and assemble a test document.

After you upload a product to HotDocs Market, you should always test the templates in HotDocs Market to make sure they are working as expected.



## Upload a New Product

1. Open HotDocs Developer on your computer.
2. Select the template or group of templates you wish to upload as a product. You can also do this by selecting the parent folder of the folder structure, if you have your templates saved this way.
3. Right click and click: **Upload>HotDocs Market**.
4. Click **Upload**.
5. Click **Create Product**.
6. Type a product name, summary and description then click **Create Product**.
7. Click **Close window**.
8. Return to HotDocs Market in your browser. The product is now in under the **New** tab of your Product List.

### Fix Template ID Conflicts

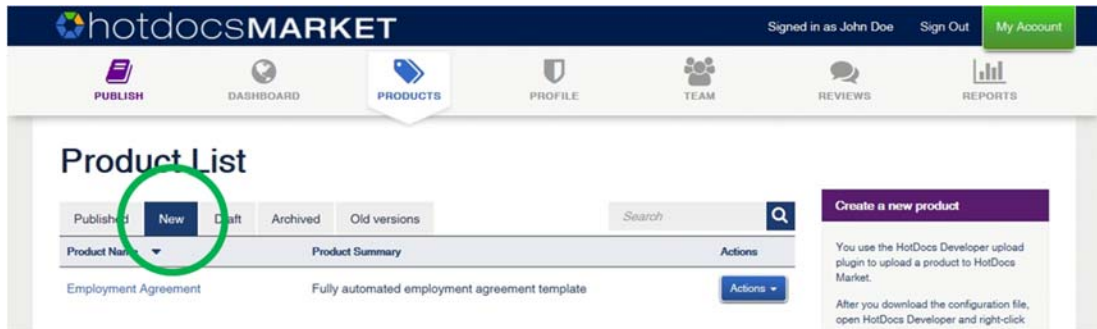
When you use the HotDocs Market upload plug-in to upload a template to HotDocs Market, you may encounter an issue with duplicate template IDs. If two or more templates on the HotDocs Market share the same template ID, HotDocs generates an error message alerting you to the problem, and specifying the templates that are in conflict.

#### **To resolve a duplicated template identifier**

1. In the HotDocs Developer library, select the template whose ID you want to change.
2. On the right side of the toolbar at the top of the library, click  Component Manager; then just below the Save icon, click  Component File Properties.
3. On the General tab, to the right of the Template Identifier box, click **New**. This updates the template ID.
4. Once you have addressed all the templates with duplicate identifiers you will need to Replace the library of the product on HotDocs Market.
5. You can then return to the HotDocs Market to publish the product.

## Publish a New Product

1. Go to the **PRODUCTS** tab of the Publisher Portal.



2. Click the **New** tab of the Product List.
3. Click **Actions** next to the new product you wish to publish.
4. Click **Edit**.
5. At the DETAILS page you can do the following actions, when complete click **Save Changes**, then **Next Step**:
  - a. Edit the text in Name, Summary and Description fields.
  - b. **Upload an icon for your template:** Click **Choose File** next to Icon and browse for the image on your computer. Click **Open**.
  - c. **Upload a splash screen for the interview:** Click **Choose File** next to Splash and browse for the image on your computer. Click **Open**.

1. DETAILS    2. PRICE    3. GALLERY    4. DESKTOP FORMAT    PUBLISH

Manage pricing for your product

Previous Step    Next Step >

**Pricing Options**

Subscription Renewal Period: Both

Annual Price: \$ 425.00

Monthly Price: \$ 45.00

How do I set the price?  Whole numbers only

**Pricing**

HotDocs will take a 30% royalty share of each sale, subject to a minimum fee of \$50.00 for annual subscriptions and \$5.00 for monthly subscriptions. If you set a price such that the minimum fee will be greater than 30% this will mean that you will receive less than your usual 70% share, and you will see a royalty warning icon beside the price. You cannot set a price below the minimum fee.

User Range	Annual Price (per user)	Monthly Price (per user)	Annual Price Preferred (per user)	Monthly Price Preferred (per user)
1	\$ 425.00	\$ 45.00	\$ 403.75	\$ 44.88
2 - 6	\$ 403.75	\$ 44.88	\$ 383.58	\$ 42.62
7 - 11	\$ 382.50	\$ 42.60	\$ 363.38	\$ 40.38
12 - 16	\$ 361.25	\$ 40.14	\$ 343.19	\$ 38.13
17 +	\$ 340.00	\$ 37.78	\$ 323.00	\$ 35.89

Add Tier    Remove Tier

Note: Prices and User Ranges can be individually customized.

**Actions**

Saved

Enable Sliders

**Availability**

Product Availability: Members preferred pricing

Note: There are active non-member subscriptions, so this product cannot be made Members Only.

Member discount: % 5

**Volume Discounts**

Enable  What is volume discount?

Tier Model:  User  Site (Block)

No. of Tiers: 5

No. of Users per Tier: 5

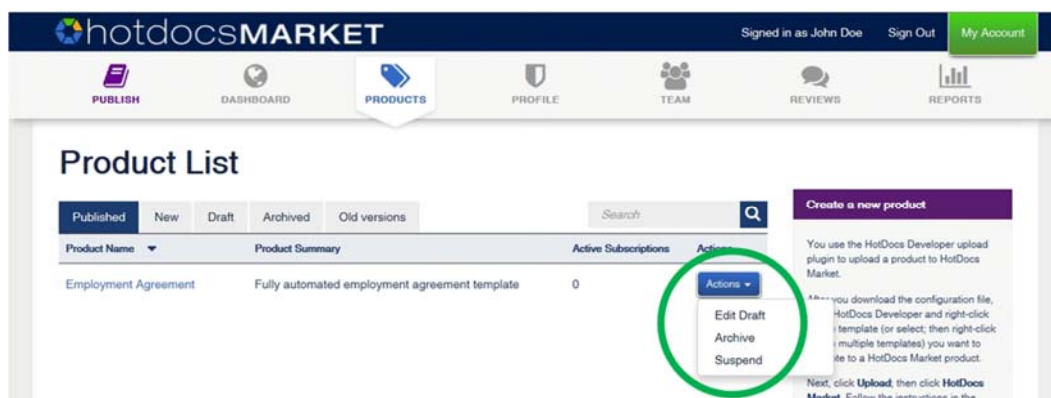
% Discount per Tier: % 5



6. On the **PRICE** page there are a variety of options / combinations available to you to set price and subscription volumes that properly capture the value of your templates.
  - a. **Set Pricing Options:** Use the **Subscription Renewal Period** drop-down list to choose between **Monthly, Annual** or **Both** pricing and then enter the prices using the sliders or number fields.
  - b. **Set Product Availability:** Use the **Product Availability** drop-down list to make the product **Available to all, Members only, or Members preferred pricing.**
  - c. **Set Volume Discounts:** In the Volume Discounts panel, check the box next to **Enable**. You then determine the tier model (i.e. offer subscriptions to your product by user or by block of users), the number of tiers, the number of users per tier, and the percentage discount per tier.
  - d. When complete, click **Save**, then **Next Step**.
  - e.

**Note:** For those publishers with subscribers to existing HotDocs-enabled products (e.g. CD-ROM), we recommend that the pricing tiers for your product offering in HotDocs Market be consistent with your current arrangement (e.g. if you are currently offering a 3-seat license for a subscription to the desktop product, then offer a 3-seat license for the same product on HotDocs Market.) This pricing practice will avoid customer confusion. For more detailed help on setting your product price, contact your HotDocs Publishing Partner representative.

7. At the **GALLERY** page you can do the following actions, when complete click **Save Changes**, then **Next Step**:
  - a. **Upload product collateral:** Click **Choose File** and browse for the image on your computer. Click **Open**.
8. At the **PUBLISH** page you can review your product for publishing.
9. Click "**Publish**" to make your product formally available for subscription to end users on HotDocs Market and to appear in the Published tab of the Product List in the Publisher Portal.
10. You can **edit** the product at any time by clicking **Actions**, then **Edit Draft** and following the same steps as above to work through the publishing options.



11. On the **PUBLISH** page, when editing a published template, you will need to add a Product Update title and description for the RSS feed and to email customers to inform them of the updates before you click **Publish**.

## Update a Product Library

To update a template within a published product library, use the Update Product method to overwrite the existing template with the updated version.

1. In HotDocs Developer, select the template or group of templates you wish to update.
2. Right click and click: **Upload>HotDocs Market**.
3. Click **Upload** and log in if required.
4. Click **Update Product** and click **Update this product** to choose an existing product to update.
5. Click **Close this window** and return to HotDocs Market in your browser and locate the updated product in the Product List.
6. Click **Actions>Edit Draft**.
7. Make any further changes needed to the publishing options.
8. At the PUBLISH page, when editing a published template, you will need to add a Product Update title and description for the RSS feed and to email customers to inform them of the update before you click **Publish**.

## Replace a Product Library

To add or remove templates from a published product library, use the Replace Product method to overwrite the entire product with new content.

1. In HotDocs Developer, select the template or group of templates you wish to update.
2. Right click and click: **Upload>HotDocs Market**.
3. Click **Upload** and log in if required.
4. Click **Replace Product** and click **Update this product** to choose an existing product to replace.
5. Click **Close this window**. Return to HotDocs Market in your browser and locate the product in the Product List.
6. Click **Actions>Edit Draft**.
7. Make any further changes needed to the publishing options.
8. At the PUBLISH page, when editing a published template, you need to add a Product Update title and description for the RSS feed and to email customers with an update before you click **Publish**.

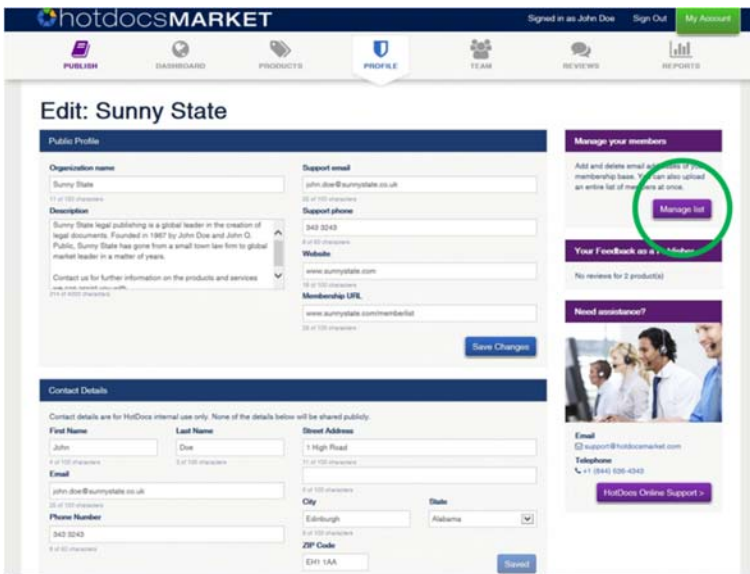
## Testing Template Interviews

You can view a template interview in the publisher portal to experience using the product as a subscriber would, this can help you to catch any template development issues.

1. Go to the **PRODUCTS** tab of the Publisher Portal. From the Product List, click a Product Name.
2. Navigate the library and click on the template name.
3. If you want to upload an answer file to test this template with, click **Upload answer file** then click **Choose File**. Select a file from your computer and click **Open**, then click **Begin Interview**.
4. Otherwise, click **Go to Interview**.

# Publisher Profile

## Manage Your Information



The Publisher Profile Page enables you to provide additional details about your company. You can provide the appropriate phone number and email address for Customer Support calls, as well as links to your website. HotDocs Market customers have access to this information and can contact your organization accordingly.

This is also where you designate your organization's main contact person. This is not public data, but instead represents the primary point of contact at your organization for HotDocs to communicate with regarding your publication(s) on HotDocs Market.

## Upload a Member List

Publishers who are also membership organizations have the ability to manage a list of email addresses. HotDocs Market uses this list to validate a user's membership status with your organization. To enable this feature:

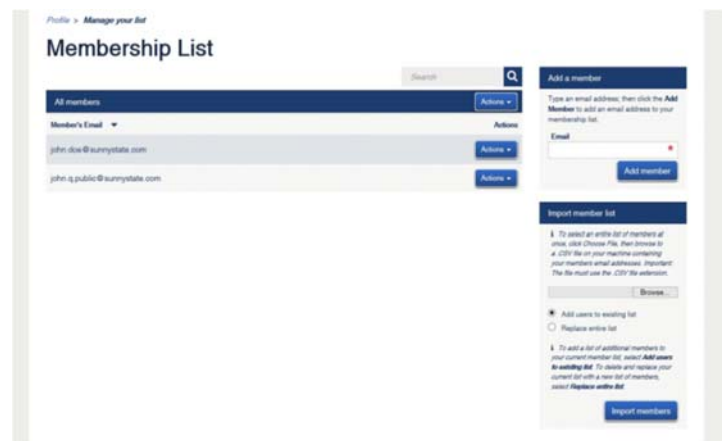
1. Create a .csv file of all the members email addresses you wish to upload.
2. Go to the **PROFILE** tab of the Publisher Portal and click **Manage your list**.
3. At the 'Import member list box, click **Browse** and locate the .csv file on your computer. Click **Open**.
4. Choose between **Add users to existing list** and **Replace entire list**.
5. Click **Import members**.

## Add a Single Member

1. Go to the **PROFILE** tab of the Publisher Portal.
2. Type in the member email address within the 'Add a member' box on the right, and then click **Add member**.

## Delete a Single Member

Use the search box above the membership list to type in the email address of the member you wish to delete. Once that email address appears, use the **Actions** drop down box and select **Remove Member**.



## Creating Templates for HotDocs Market

HotDocs Market uses the HotDocs Cloud Services technology to present interviews and assemble finished documents within a web browser. As such, certain desktop template features are either [not available](#) or [work differently](#) in browser-based interviews. A list of these features is available in the HotDocs Developer Help file.

As you develop templates for your products on HotDocs Market, you will need to:

- **Use the HotDocs Developer features specific to HotDocs Server and Cloud Services.** This ensures that all template features work within the browser-based context in which Market delivers them to your customers
- **[Enable your templates for browser-based deployment](#)**—so you can upload your templates to HotDocs Market
- **Use the [Test in Browser](#) feature** of HotDocs Developer prior to uploading your templates to HotDocs Market to approximate your template interviews running in a web browser.

For more information on developing templates for HotDocs Market, contact your HotDocs Market representative who will be happy to provide you with the latest guide.

## Supported Software

Before uploading a template to HotDocs Market, you should also be aware of which versions of HotDocs Developer are supported by HotDocs Market, as well as which browsers your customers can use to access your final products.

HotDocs Market is compatible with: **HotDocs Developer 11.0.2 and later**. For optimal performance, use the latest version of HotDocs Developer.

**Tip:** HotDocs 11.1 introduced new features you may find useful in creating templates for your Market products, such as the capability to use INSERT instructions within computations.

## Web Browser Support

HotDocs Market currently supports the following browsers:

- Microsoft® Internet Explorer® 8.0 or later
- Google Chrome (Latest Version)
- Firefox (Latest Version)
- Safari (Mac, Latest Version)
- Safari for iOS (iPad, Latest Version)

You can use these same browsers to administer and maintain your products within HotDocs Market.

Contact your HotDocs representative for a copy of the Technical Requirements document for HotDocs Market publishers.

## Customer Engagement

### Visitor (pre-purchase)

HotDocsMarket.com is a public domain. Visitors may be directed to the site through marketing materials, online searches or learn about it through other sources. While the website is publicly available, the context of the service is meant to support business-to-business relationships. Visitors can to browse the site and visit the following pages without an account:

- **HOME** – view the site home page
- **MARKET** – select and view products
- **ABOUT** – an overview of the site
- **PUBLISH** – an overview of publishing
- **HELP** – FAQs
- **CONTACT US** – send a message to customer support
- **Sign In** or **Go to My Subscriptions** – view the Sign In page and link to the Register page
- **Register** – directly access Register page; completing this action turns a visitor into a user

### Subscribers and Users, Registration

Once a visitor makes a purchase they become a Subscriber. Alternatively, someone may receive an invitation to join a subscription that has been paid for; these customers are called Users (or Licensed Users). Regardless of whether the individual directly makes a purchase, everyone must complete the registration process.

#### *Register:*

1. Click **Register** and fill in details required.
2. Type the characters and numbers from the CAPTCHA image.
3. Check the box to accept terms and conditions.
4. Click **Create Account**.

Registration is often completed during the course of a purchase. Any licensed user can become a subscriber by purchasing a product subscription:

#### *Purchase a Subscription:*

1. Click **MARKET**.
2. Select a product from the list and view product details and marketing materials, then click **Add to Cart**.
3. Check quantity needed and click **Proceed to Checkout**.
4. Type details for business and billing address.
5. Type in payment details.
6. Click **Review and Approve**.
7. Check the box to accept Market subscription terms and conditions then click **Complete Payment**.
8. The user is now a Subscriber. To begin using your templates, click **Go to My Subscriptions**.

## Subscription Renewal

Subscriptions are on a monthly or yearly basis and are normally automatically renewed using the credit card details from the original purchase. When a subscription is about to expire, HotDocs sends a series of emails to the Subscriber to let them know the details of the renewal. HotDocs Market sends the following emails:

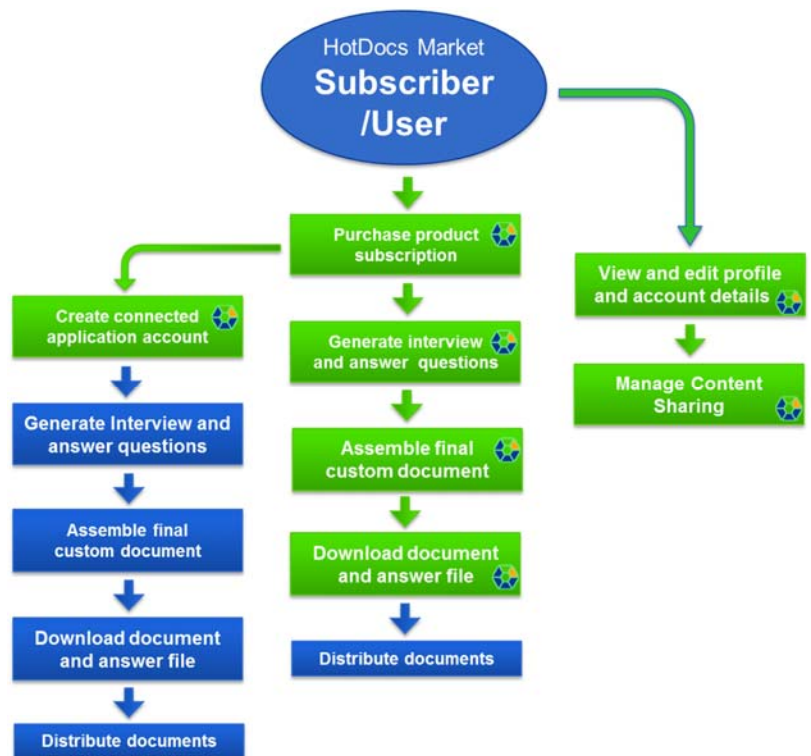
- **14 days before expiry:** The email informs the Subscriber of the amount and date of the renewal charge for the product; HotDocs Market contact information and links are also included.
- **7 days before expiry:** The email informs the Subscriber of the amount and date of the renewal charge for the product; HotDocs Market contact information and links are also included.
- **Upon expiry (if payment not completed):** The email informs the Subscriber that their subscription has now expired due to a payment error and they are now unable to access the product. The email informs the subscriber that they still have access to answer files from previous sessions but are unable to generate new documents until they make a payment. The subscriber is also given a link to update their billing information and complete the payment. If they are not the primary subscriber, the email does not give the option to complete the payment for this subscription; instead, they are instructed to contact the primary subscriber with any questions or purchase a new subscription from the Market; HotDocs Market contact information and links are also provided.

## Subscribers and Users, Account Actions

The primary difference between a Subscriber and a User is that **only the Subscriber may see the financial details associated with the subscriptions they have purchased**. A User that has received an invitation to share in a subscription (purchased by someone else) does not have access to any of the financial information of the purchase.

It is important recognize that someone can be both a 'Subscriber' on a product they have directly purchased, and a 'User' on a product that someone else has purchased and shared with them.

Subscribers and Users can access all of the same pages as the Visitor above, as well as the Subscriber Portal which enables the following activities. Publishers can also access many of these options by clicking on My Account.



### View and Edit Details:

1. Click **My Account > My Details**.
2. From the My Details page, complete the following actions:
  - Edit your personal details (including adding a business and billing address)
  - Add a U.S. Tax Exemption number
  - Edit your email address and add additional email addresses
  - Change your password
  - View the number of failed attempts since last sign in and click **View Recent Activity** to see when and where the account has been accessed.
  - Click **Proceed to Close Account** to close your Market account
  - Click **Communications** to opt in or out of email communications
  - Click **Interview Options** to disable or enable the save answers feature in the interview

### *Accept or Decline a publishing team invite:*

1. Open invitation email and click the **HotDocs Market** link.
2. Log in.
3. Click **Accept** or **Decline**.
4. If you choose to accept, you have to then verify your email address.
5. Open the verification email and click the **HotDocs Market** link.
6. Click **here**.
7. Check the box to accept publisher terms and conditions, then click **Continue**.
8. The user is now a publisher.

## Subscribers and Users - Using Your Subscription

Both Subscribers and Users access subscriptions through the Subscriber Portal. The main dashboard provides direct links to your products and Working Sessions. Through this functionality, subscribers can access templates, fill in information, create documents, and download documents and answer files.

### *Assemble a Template:*

1. Click **My Account** and in the My Subscriptions table, click the product title you want to assemble a template from.
2. Expand library folders or search library to locate the template you want to assemble.
3. Click the template title.
4. Choose from the following options to open the interview:
  - a. **Start a new session:** Edit the Session Name if you want, then click **Create New Session**.
  - b. **Use an answer file:** Click **Upload File**, then **Choose File** to browse your computer for the HotDocs answer file. Select a file and click **Open**. Click **Begin Interview**.
  - c. **Use an existing answer session:** Click **Select Session**, then click **Continue Session** next to a previous answer session.
5. Complete the HotDocs interview.
6. Click the finish interview icon at the bottom right hand corner of the interview window.
7. You can then download the completed document, Export the answer file, Return to the interview or go to my account.

### *To assemble another template straight away:*

1. During the interview, or if you choose to return to the interview after downloading the assembled document, you can click **Use Another Template**.
2. Either select a template from the list or click **add a new template**.
3. Select another template from the product.
4. Complete the new interview as before.

**Note:** You must download the document or answers from the original interview before you choose to use another template. You cannot download either the document or answers from the original interview in the next interview.

### *Purchase more user licenses:*

1. At the My Subscriptions table of My Account, click **License Options** next to the product, and then click **Purchase more users**.



2. Click **Add to Cart** to continue purchase as before.

### *Manage Content Sharing:*

1. Click **My Account**, then click **Content Sharing**, and then click **Manage sharing**. You can then choose from the following options:
  - a. **Invite a new user:** Type in the user email address, then click **Send invitation**.
  - b. **Cancel invitation:** Until the invited user responds you can cancel the invite by clicking **Cancel invitation** next to their email address.
  - c. **Revoke a user license:** Click **Revoke** next to a user email address.

### *Accept or decline a license invite:*

1. A sharing invitation appears on the My Subscriptions tab of My Account.
2. Click **Accept** or **Decline** on the sharing invitation.
3. If you accept it appears in your My Subscriptions list and is available for assembly.

### *View Purchase details:*

1. Go to the **Transaction History** tab of My Account.
2. Click the Purchase details icon next to the item you want to look at.
3. Click **Show Order** to view order details.
4. Click **Close** when finished.

### *Connect to HotDocs Document Services:*

1. Go to the **Connected Applications** tab of My Account.
2. Click **Create a free account**.
3. Check the boxes for any users you want to share content with on your site.
4. Click **Create Account**.

## Subscribers and Users, Bar Membership

Bar membership is validated through email address (as submitted to HotDocs Market in a csv file). Subscribers are able to associate multiple email addresses with their account. They only need to add the email address that they have registered with the Bar Association to their HotDocs Market account, and they will automatically be associated with that Bar Association for product access and any pricing benefits.