Subscriber & User Support Guide

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Smart content. Smart business.

Subscribing to and Using HotDocs Market Templates

A HotDocs Market subscriber's guide for accessing templates, managing your Subscriber Account and getting the most out of your HotDocs Market subscriptions

SUBSCRIBER SUPPORT GUIDE

support@hotdocsmarket.com

Introduction

What is Market

Welcome to HotDocs Market - a unique ecommerce platform offering expertly crafted legal templates published by bar associations and other legal industry experts. Templates are automated using HotDocs technology!

Using HotDocs Market you can:

- Complete and deliver contracts in minutes instead of hours!
- Receive ongoing updates from publishers instead of having to install a CD-ROM on your desktop!
- Enjoy flexible pricing options for your practice!

Easy to Use

HotDocs Market allows you to take advantage of proven, existing templates that are easy to use. It helps you avoid spending unnecessary time and money creating your own templates. And it's easy – select your product, choose the pricing option that works for you, and checkout. Products are immediately accessible in your HotDocs Market account.

Expert Content

Publishers on HotDocs Market bring a wealth of industry knowledge and expertise; organizations, range from bar associations to commercial publishers to specialists from niche practice areas. They offer valuable court forms and state-specific documentation. Updates will be made by publishers as needed and these changes are automatically available through your HotDocs Market account for convenience.
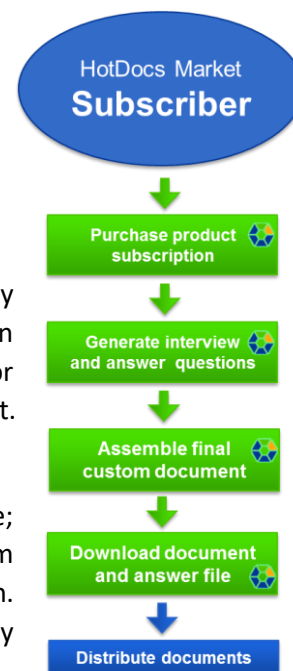
Accessibility

Because HotDocs Market is cloud-based, you can access your account from anywhere at any time on any browser-enabled device.
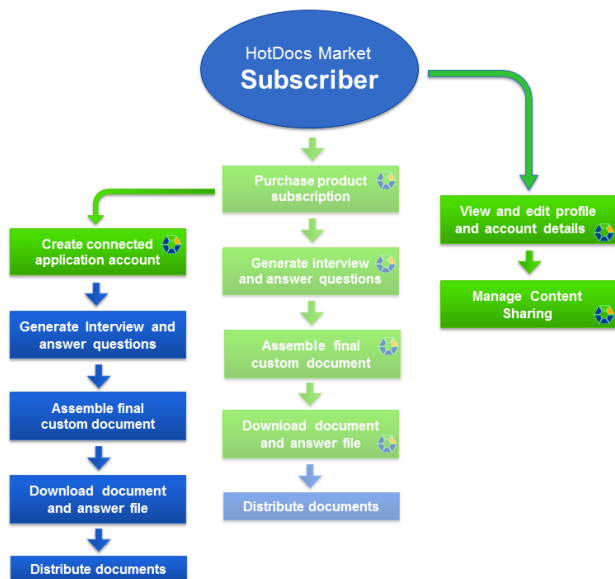
You can use the connection application feature to receive free access to a basic HotDocs Document Services account, with the option to upgrade to a premium Document Services account. You can also connect to third-party applications.

If you have existing Document Services accounts registered to your email address, HotDocs unified login system automatically connects these addresses with HotDocs Market. You can use the workflow in Document Services to manage the templates you gain access to when you subscribe to a product in HotDocs Market.

Support

Customer Support is available for any questions you might have about your account or experience with HotDocs Market. Please visit HotDocs Support for further details.

Getting Started

Become familiar with the **subscriber experience** – account setup through the product subscription process, to generating and completing an interview, to assembling, saving, and downloading your finished custom document.

Getting on to the HotDocs Market website is easy; simply go to: www.hotdocsmarket.com

As a subscriber to HotDocs Market, you can avoid spending unnecessary time and money crafting your own templates using the following steps:

1. **Register** for a HotDocs Market account and **Browse HotDocs Market** to select a product for purchase.
2. Choose the pricing option that works for you and **subscribe to a product**.
3. Once you subscribe, access and **use your products to create documents** and answer files by generating an interview (data gathering session); then answering the questions in the interview.
4. After you **complete the interview**, wait while Market assembles a final document for you to download.
5. **Download the final document** and distribute it as you like.

How do I create an account?

You set up a HotDocs Market subscriber account by navigating to www.hotdocsmarket.com and registering as a first time user; alternatively, if you received an email invitation from another Market user, you can click the link in the invitation.
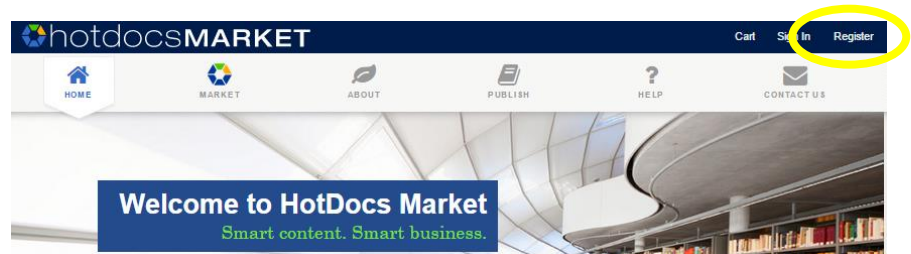
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If you have received an **email invitation** from HotDocs Market, click on the link in the email and follow the instructions; otherwise, navigate to the [HotDocs Market website](#); then in the top right hand corner of the page, click **Register**.

> **Important:** Be sure to register using the *same email address that the email invitation was sent to*. If you have an existing Document Services account associated with the email address in the invitation, you can sign in to Market using your Document Services credentials.

You will be able to add additional email addresses to your account later to associate with bar associations, existing Document Services accounts, and any partner organizations.

To register **without an email invitation**, click Register in the top right hand corner of the Market window. Follow these steps:

1. Type in your details and type in the CAPTCHA information.
2. Check the box to accept the terms and conditions.
3. Click **Create Account** to finish.

You can edit your details later by clicking **My Account** at the top right corner of the page, and opening the **My Details** tab.

If you have **existing Document Services accounts** registered to your email address, HotDocs unified login system automatically connects these addresses with HotDocs Market. You can use Document Services to manage the templates you gain access to when you subscribe to a product in HotDocs Market.

Browsing HotDocs Market

You can browse HotDocs Market both before and after logging in. **Click on the 'Market' logo** in the navigation bar to begin browsing the list of HotDocs Publishers and Products available for subscription.

Search for products by entering key words into the text box on the right side of the page. Market will return tiers of products, highlighting templates that align with the search terms you have used.

Select a product by clicking on it to find out more information about the publishers, what templates are included in the product set, and reviews posted by other users. Go to the Library tab to view all the templates available as part of this product.

On the right-hand side of the screen, you will see Publisher information. You can click View full profile to go to a page with additional details about the publisher, as well as other products they may have available.

Subscribing to Products

After you locate a product you want to use, you purchase a monthly or annual subscription to that product, depending on what the publisher offers. You can purchase multiple licenses to the product and share the subscription with other members of your team or company.

At the top right of each product page, there is a **blue box with pricing and subscription options**. Below this box you may see additional information about volume discounts or member preferred pricing.

You can select the pricing dial for the option you prefer and click the **Add to Cart** button to purchase one license. If you would like to purchase more than one license, click the text below the blue box and explore volume discounts that may meet your needs.

Use the steps above to add multiple products to your cart until you complete your shopping. You can access your shopping cart at any time by clicking **Cart** at the top of the Market website. Once you are ready to complete the purchase process, click **Proceed to Checkout**.

Buying Multiple Licenses

At Checkout you will see the number of licenses for your product (as set by the publisher) to your subscription. You can purchase more licenses if needed using the drop down arrow; the new price – and any discounts will be automatically calculated. You then enter your credit card information and once processed – you have successfully subscribed and can start using the product right away!
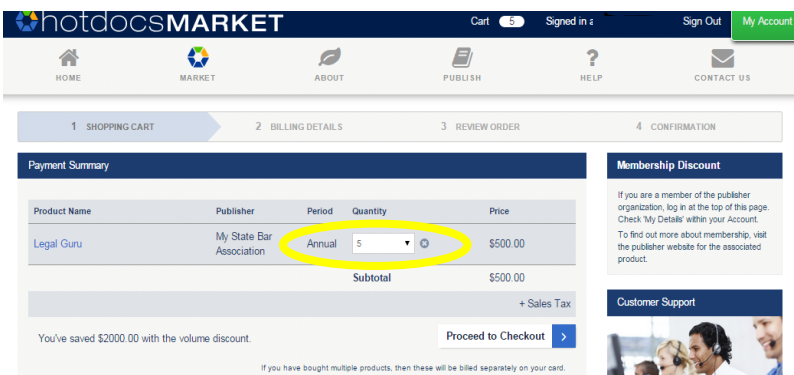
To purchase additional licenses for other people at your firm and ensure you are able to take full advantage of volume discounts available, select My Account and from the My Subscriptions table click License Options next to your chosen product. Select Purchase more users from the drop-down list. Add the product to your cart and continue through the purchasing method as before.

Using Your Products

If you have an existing account, you can sign in and go directly to **My Account**. All of your existing subscriptions and working sessions will be available on your dashboard (tab titled My Subscriptions within My Account).
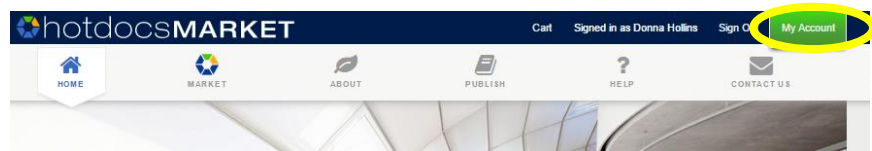
Subscriber Portal and Your Dashboard

Once you have signed in, you are taken to the 'My Subscriptions' tab of the Subscriber Portal. Here you will see the most recent Working Sessions, as well as the HotDocs Market Products to which you currently subscribe, 'My Subscriptions'.

You decide if you want to:

- **Open an existing Working Session**, either In Progress or Completed.
- **Start a new Working Session** with one of the templates in 'My Subscriptions'.
- **Select a template** and then upload an existing Answer File for a Working Session.
- **Subscribe to new products** through the available products in Market (for example, 'Legal Guru').
- **Update your Account Details** through the My Details tab. This includes contact information, a link to update the credit card associated with your subscriptions, and communication preferences.
- **Share licenses** within the Content Sharing tab, if you have subscribed to multiple licenses for a product.
- **View past transactions** under the Transaction History tab, which includes itemized information on your purchases, as well as active and past subscriptions. You can also update your credit card details.
- **Access Document Services** either from your Dashboard if you already have a DS account, or through the Connected Applications page if you would like to create a free basic account.

Using My Subscriptions and My Account

Subscriptions and Working Sessions

After signing in through the 'My Account' button at the top right, you are taken to the 'My Subscriptions' tab of the Subscriber Portal. This is the main subscriber dashboard.

In the upper section of the page you will see **'Working Sessions'** which include all of your previous work. Each Working Session includes answer files and templates that have been previously created or associated with that session.

You will see a list of **products you've subscribed to** (or which have been shared with you) **under 'My Subscriptions'** which is below Working Sessions on your Dashboard. When you click on the product name you are taken to a list of templates (e.g. 'Employment Letter') from which you can start a Working Session.

Begin a Working Session

- **Start a new Working Session:** Clicking 'Create New Session' starts an interview for your chosen template and currently defaults to the name of the template. You have the option of renaming the form at this time (e.g. Client's last name, first name). Complete the interview questions following the on-screen instructions.
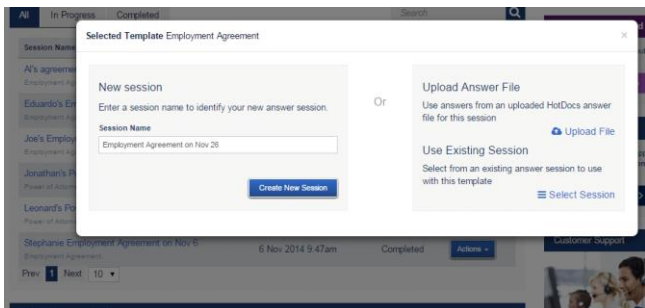
- **Upload an answer file to create a Working Session:** Click Upload File to browse to select an existing HotDocs answer file (.anx) from your own files to populate the answer fields of the interview. Currently, HotDocs Market enables answer files to be uploaded one at a time. Once you have selected a HotDocs answer file, click 'Begin Interview' to check your uploaded answers and add any additional information.

Access an Existing Working Session

Your options to access or update an existing Working Session from the main dashboard:

- **Open an existing Working Session** and/or **generate a completed Document:** Click the name of the Working Session to choose the previously saved session you want to re-open. Complete the interview as desired and click 'Finish'. HotDocs Market assembles your document(s) and provides you with a screen which allows you to download the appropriate document(s) and/or answer file; you then have thirty minutes to download the finished document. If you miss this window for downloading, you can always reopen the Working Session.

- **Rename a session:** From the Actions drop-down list, choose Rename. Select the existing title, then type a new session title. Click 'OK'.

- **Open a session and access specific template:** If there are multiple templates associated with the session, go to the Actions drop-down list and choose Select Template... Click the name of the template you would like to access. If you are already within the Interview page, you can switch templates by clicking 'Use Another Template' button at the top right of the interview area. HotDocs Market assembles your document; you then have thirty minutes to download the finished document.

- **Download an Answer File:** Locate the session you want within the Working Sessions in your dashboard. From the Actions drop-down list, select Download Answer File.
- **Delete a session:** From the Working Sessions, locate the session you want to work with. From the Actions drop-down list, choose Delete. Click 'OK'. **Note:** If you **delete a session, it is not possible to recover** the Answer File or any of your associated work.

Saving Your Work

HotDocs Market offers an auto-save feature to help avoid the frustration of losing your work. After 30 seconds the interview **automatically saves your answers** and you are able to return to it as a working session if you leave the page. You can also save your answers at any point by clicking Save Answers.

To access a saved session, at the top of the page click **My Account**. On the Overview tab you can see the Latest Working Sessions table. This table shows the templates you have recently worked on. Choose from All, In Progress, or Completed sessions. Click on a session name to continue an interview or visit a completed interview to assemble another document. Alternatively, click Actions to: Open and re-start the interview from where you saved your answers previously, Delete the existing session, or Rename the existing session.

> **Note:** You can choose to stop HotDocs Market from saving your Working Sessions. At the top of the page click My Account. On the **My Details** tab, in the **Preferences** box on the right-hand side, click **Interview Options** and de-select Enable interview answer save feature. Click Save to confirm the change.
>
> *It is important to understand that this approach cancels the auto-save functionality.* You will need to manually save and download your answer file each and every time you want to save your work, otherwise your session answers are permanently lost. At your direction, HotDocs will not have any information saved.

Saving completed documents: Once your document is completed, you can save it to your desktop or to a free, basic HotDocs Document Services account [see 'Connected Applications'].

Sharing a Subscription

If you have purchased multiple subscriptions to a product, you can share the additional subscriptions with other people. At 'My Account' click on 'Content Sharing'. Next to the product you want to share, click 'Manage Sharing'. Type in the email address of the person you want to receive your additional subscription and HotDocs Market sends an email stating you are sharing HotDocs content and instructing them to log into the Market using this email address.

The Manage Sharing dialog also provides you the following options:

- **Cancel invitation:** Until the invited user accepts your invitation, in the Invited users that have not yet accepted table, you can cancel the invite by clicking **Cancel invitation** (to the right of the user's email address).
- **Revoke a user license:** Once a user accepts an invite, in the Active Users of Partner Profiles table, you can remove that user's rights to the license by clicking **Revoke** (to the right of the user's email address).
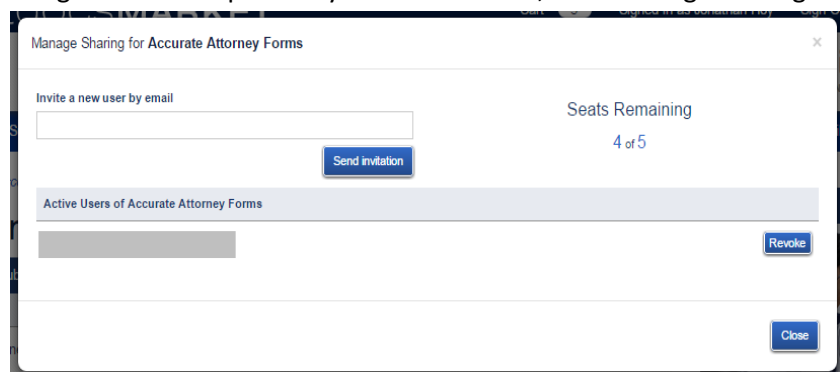
Using HotDocs Desktop Format (HDI)

HotDocs Market is browser-based (i.e. you can use your subscription on any device with browser access). If there is an HDI download available with your product, you also have the option to subscribe to products on HotDocs Market and use them on your desktop provided HotDocs Player is installed. HotDocs Player 11 can be downloaded from your HotDocs Market account on the 'My Account' page.

Key differences about using the **desktop format vs. browser access** are as follows:

- Browser working sessions are automatically saved every 30 seconds; desktop sessions need to be saved manually by the user.
- Working sessions created through the browser can be accessed through the website from any device with browser access (i.e. you can start a working session on one device, and then continue a working session from another device; physical location or proximity of the devices is not relevant); desktop sessions are only accessible from the computer with the downloaded HDI file and the installed HotDocs Player.
- Product updates made by the publisher are automatically incorporated into templates available in HotDocs Market and the Subscriber portal; users accessing templates through an HDI file will need to re-download the HDI file every time a publisher makes an update, as with current procedures for installing updates.

To download a HotDocs Desktop Format (HDI) file

1. Click **My Account**.
2. From the My Subscriptions table, select the product you want to download.
3. On the right of the template list, click **Download Desktop Version (HDI)**.
4. When prompted choose to save this file on your computer.
5. To use the product in HotDocs Player, double click the saved file in your documents.

Transaction History

Active Subscriptions

You can view your active subscriptions by going to My Account and selecting the 'Transaction History' tab. Active Subscriptions appear at the top of the page. Links enable you to view purchase details as well as renewal information.

To view subscription details

1. Click **My Account**; then at the top of the page, click **Transaction History**.
2. Click **Purchase details** next to the subscription you want to look at.
3. Click **Show Order** to view your order form.
4. Click **Close** to exit.

Past Transactions

Transactions that have occurred in the past include subscriptions which are no longer active or transactions which occur only once and are not part of a renewal cycle. This section appears below the Active Subscriptions area, on the Transaction History tab of My Account.

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Credit Card Details

The Transaction History tab in My Account provides access to update the credit card details associated with your Active Subscriptions. Please note that the billing information associated with your credit card must align with the billing details as listed on the My Details tab of My Account.

				Subscription type	Licenses	Unit price	Sales tax	Total price
Accurate Attorney Forms			Purchase details	Monthly	5	$15.60	$5.27	$83.27
Accurate Attorney Forms			Purchase details	Annual	5	$140.00	$47.25	$747.25

My Subscriptions · **Transaction History** · Content Sharing · Connected Applications · My Details

Home > My Account > Account History

Subscription History

Active Subscriptions

Product title ▼

Credit Card Details

Update the credit card information associated with your subscriptions

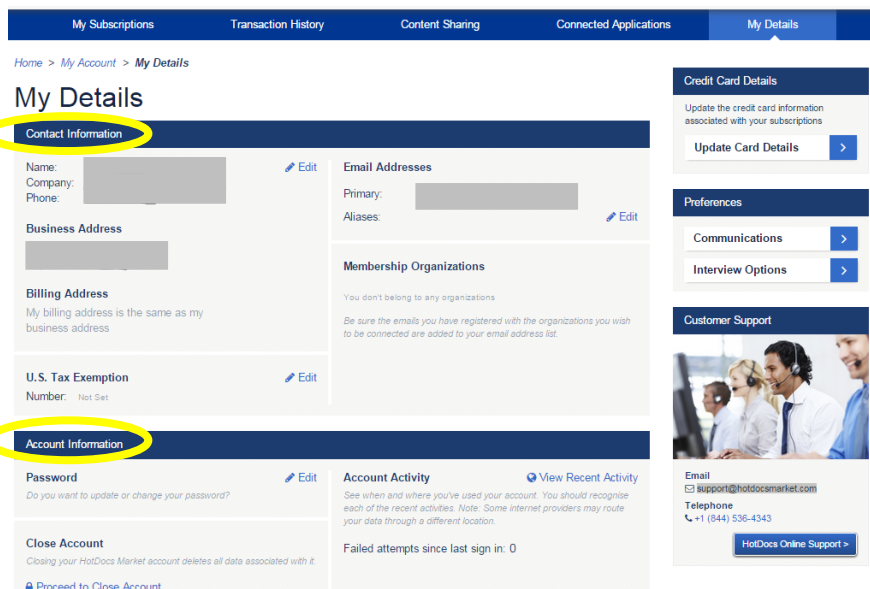**Update Card Details** ＞

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Managing My Details

Contact Information (Billing/ Business Address)

To access or update your contact details, go to My Account and select the My Details tab. This tab allows you to edit/update your billing and business address information (name, address, U.S. Tax exemption number, etc.). It's also where you can alias your other email accounts (home, work, etc.) with your primary HotDocs Market email address. For those subscribers who are also members of an organization, e.g. State Bar Association, the 'My Details' tab is where you will manage your email address associated with that organization.

To edit your contact information

1. Click **My Account**; then click **My Details**.
2. At the Contact Information panel, next to your name, click **Edit**.
3. Change any information you want; then click **Save**.

To edit your U.S. Tax Exemption code

1. Click **My Account**; then click **My Details**.
2. At the Contact Information panel, next to U.S. Tax Exemption, click **Edit**.
3. Edit the number; then click **Save**.

To edit your Email Addresses

1. Click **My Account**; then click **My Details**.
2. At the Contact Information panel, next to Email Addresses, click **Edit**.
3. Choose from the following actions:
   - **Add an alias:** Type an email address; then click **Add**.
   - **Remove an alias.** To the right of the alias email address you want to delete, click **Remove**.

To view your Membership Organizations

1. Click **My Account**; then click **My Details**.
2. At the Contact Information panel, in the Membership Organizations block, you can view any membership organizations you belong to.
3. Your 'membership' status for organization is automatically determined based on the email address(es) associated with your HotDocs Market account.

Account Information (Password/ Preferences)

Under the Account Information bar, you can change your account password, view account activity and close your account [see FAQs for more information regarding closing your account].

Credit Card Details

The box on the right-hand side links to credit card details associated with your Active Subscriptions. Please note that the billing information associated with your credit card must align with the billing details as listed under 'Contact Information'.

Communication Preferences

The Preferences box on the right-hand side of the page provides access to opt-in or opt-out of email communications for activities such as updates to your subscriptions, changes to HotDocs Market and offers from Publishers. You are also able to edit your Interview Options, which changes the auto-save functionality associated with your Working Sessions.

Note: You can choose to stop HotDocs Market from saving your Working Sessions. In the Preferences box, click Interview Options and de-select Enable interview answer save feature. Click Save to confirm the change.

It is important to understand that this approach cancels the auto-save functionality.

You will need to manually save and download your answer file each and every time you want to save your work, otherwise your session answers are permanently lost. At your direction, HotDocs will not have any information saved.

Customer Support

HotDocs Market

Customer Support is available for any questions you might have about your account or experience with HotDocs Market. Please visit HotDocs Support for further details.

Publishers

Publishers are available to answer content- or product-specific questions you might have. Contact details for each publisher are available on the publisher profile page. From the main HotDocs Market site, click on the relevant product and at the right-hand side of the page you will see additional details about the publisher for that product.

If you aren't sure who to contact, the HotDocs Market Customer Support team welcomes all questions.

Frequently Asked Questions (FAQs)

How do I get access to Bar-Member-Only Products on HotDocs Market?

Your Bar Association maintains a list of members' email addresses which permits HotDocs Market subscriptions to member-only content. As long as you are a member of the bar association in good standing and have an email address on file with the bar association (which is also associated with your HotDocs Market email address), you should have the ability to subscribe to bar association content.

## Can I associate multiple email addresses with my HotDocs Market account?

Yes! Go to the 'My Details' tab and click on the 'Edit' icon to enter the email address(es) you wish to associate with your primary HotDocs Market email address.

Do I lose my Answer Set or Working Sessions if I cancel my subscription?

You do not lose your answer set if you cancel your HotDocs Market subscription. However, you are no longer able to generate new documents if your subscription is not active. You may re-subscribe to available products and will then be able to access existing answer sets within Working Sessions, and align them with your active templates.

After I've completed a form, how do I go back to my subscriptions?

You simply use the 'back' button on your browser to return to your list of subscriptions. You can also select My Account from either the pop-forward screen or the top left of the interview screen.
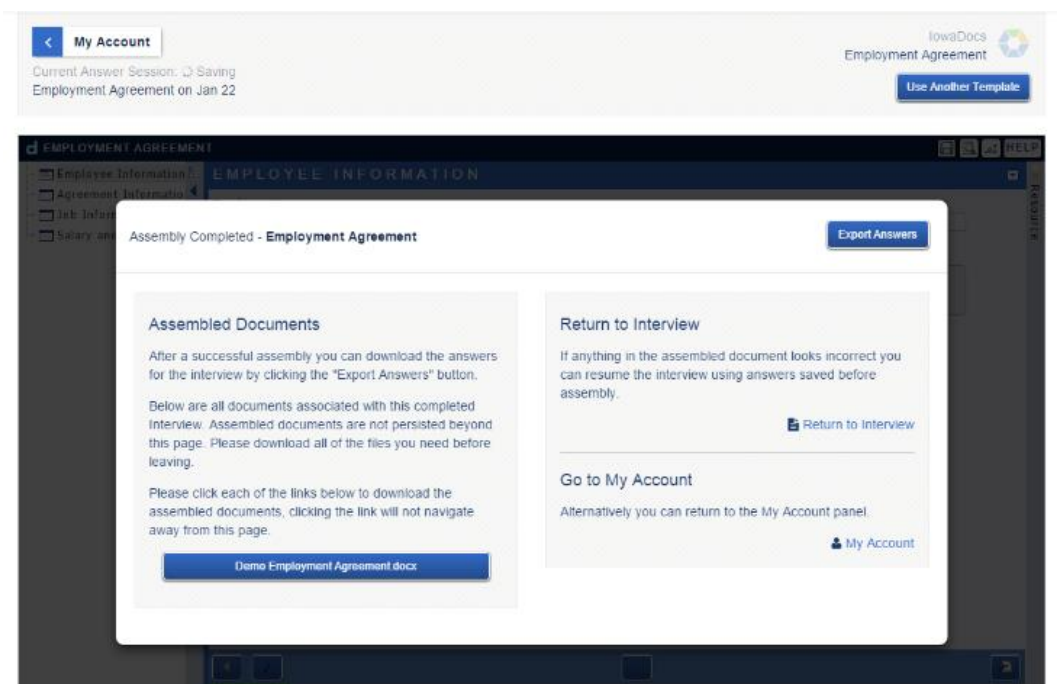
Appendix A: Bridge Subscriptions

Converting Existing Subscription to Payment through HotDocs Market

If you have been granted a HotDocs Market subscription (either purchased by someone else or connected to a prior purchase directly through a publisher), then there is a slightly different method for updating your credit card details and enabling auto-renewal.

Update Purchase Details

When your subscription period is coming to an end, you should edit the purchase details associated with that subscription so you can take over any future payments. To make sure you don't lose access to your templates, you can update your details using HotDocs Market.

1. Click **My Account**; then click **Transaction History**.
2. Click **Purchase details** next to the subscription you want to update in the table.
3. Click **Enter Payment Details**.
4. Update your payment details and accept the terms and conditions. Click **Submit Payment Details**.

If your subscription has already expired, rest assured that your work still remains within your account. All you have to do is make a new purchase of the product you need, and you will be able to continue generating documents.

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Appendix B: Connected Applications

Linking to 3rd Party Applications

Whether you use Actionstep, Amicus Attorney, Clio, SharePoint or any other business process management software within your company, your HotDocs Market templates can be used from within your chosen system to offer seamless document generation as part of a wider system. Data can be securely shared between a third party application and HotDocs, ensuring that any requirement for repeat data input is eliminated.

Document Services

When you subscribe to content within HotDocs Market there are a range of options for you to maximize the utility of the documents, forms and packs that you have purchased. As a subscriber to HotDocs Market, you have free access to a basic HotDocs Document Services account - an out-of-the-box document generation application running in the cloud. Here, you can store purchased templates and access them with the full realm of Document Services functionality.

HotDocs Document Services is a Software-as-a-Service (SaaS) application that provides innovative features to help you communicate with your clients more efficiently and effectively. You can use it to generate and manage documents, as well as manage clients and users - and it's accessible online from anywhere, on any device. Simply click on the 'Create a free account' tab on the Connected Applications to open an account.

> **Note:** This feature becomes available once you purchase a subscription to a product.

To create a Document Services account

1. Click **My Account**; then click **Content Sharing**.
2. Just below the first paragraph, click **Create a free account**.
3. Click **Create Account**.
4. Once the account creation process finishes, in the same place you clicked Create a free account, beneath Your Document Services Site, click the **link** to your new Document Services site. The URL takes the form of *yourbusinessname*.hddocumentservices.com
5. Review the Document Services Terms of Use, then at the bottom of the page, click **Click here to accept the Terms of Use**.

Document Services Premium

With Document Services premium upgrade, you will be able to upload new templates that you have created using [HotDocs Developer](#) allowing you to generate, store and access your own, bespoke automated documentation for use within your business. [see 'downloading the HotDocs Developer Configuration File']

Whether you use Actionstep, Amicus Attorney, Clio, SharePoint or any other business process management software within your company, HotDocs templates can be used from within your chosen system to offer seamless document generation as part of a wider system. Data can be securely shared between a third party application and HotDocs, ensuring that any requirement for repeat data input is eliminated.