HotDocs Document Services

User'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).

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HotDocs Document Services
User's Guide

Welcome to Document Services

Welcome to the Document Services Users Guide. Document Services is a HotDocs Software-as-a-Service application (SaaS) hosted in Microsoft's Azure Cloud. Document Services enables you to assemble the templates your firm creates in HotDocs Developer and store documents 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 you 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.

Getting Started

Once your firm's Administrator has created your user area on your Document Services site you will receive your site address and log in details. The first time you log in you will be able to take a virtual tour of the site. You can re-take this tour anytime by clicking on the link in your account settings page.

Navigating Around Your Site

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

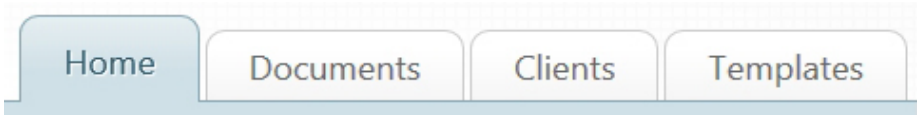
Banner Bar

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.



Taskbars

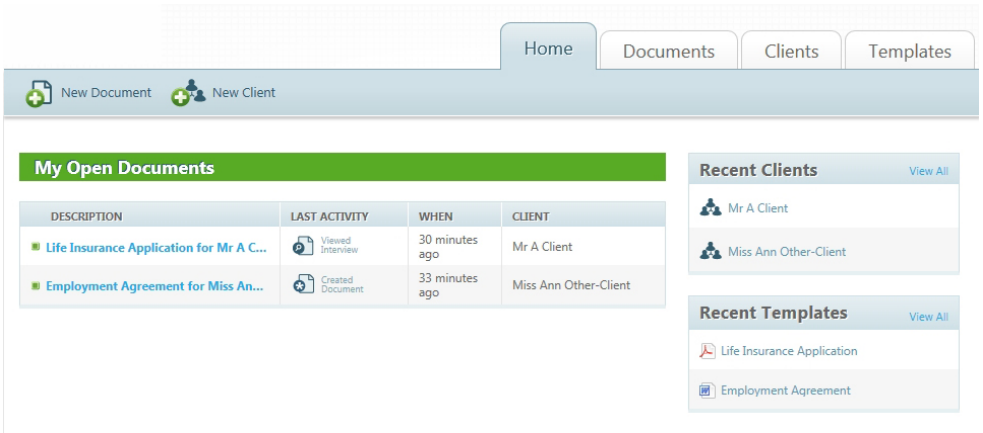
Taskbars provide a submenu to functions available on the active page, such as the ability to create a new user or document. The submenu of the Clients tab, for example, consists of the following options: **New Client** and **Import Clients**.

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.

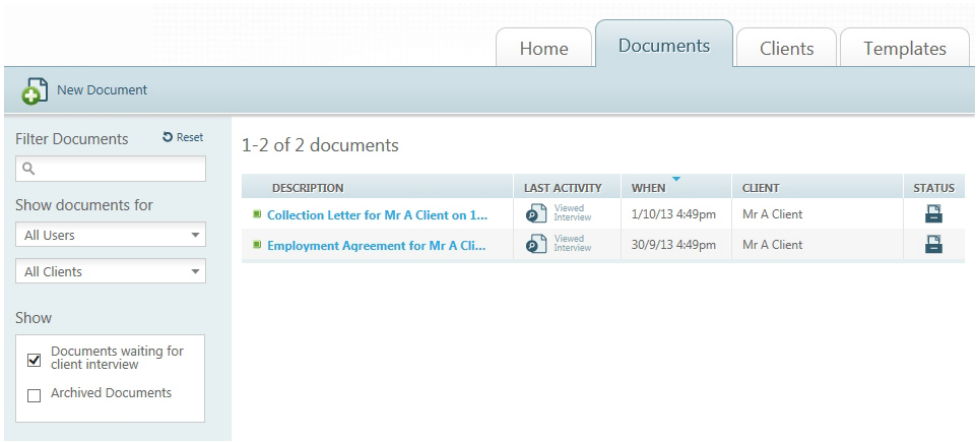
Documents Tab

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 12), 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 9).

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**).

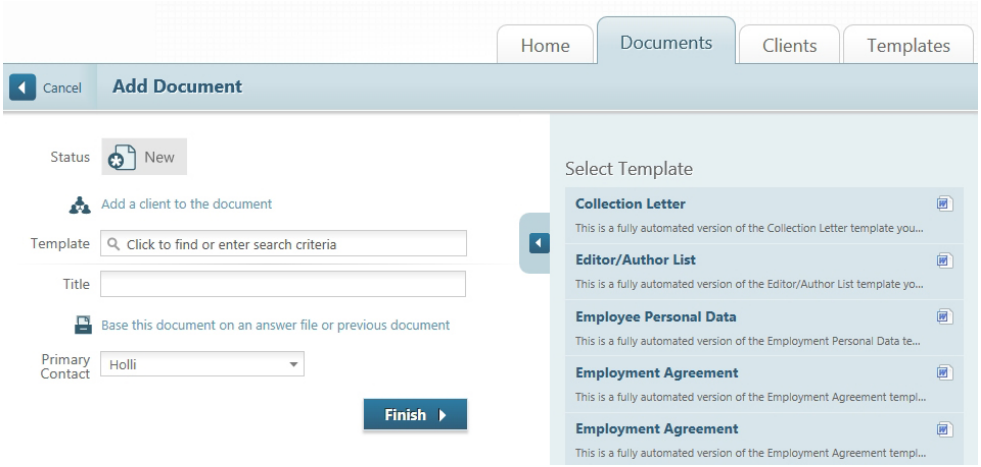
Filtering Documents Panel

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.



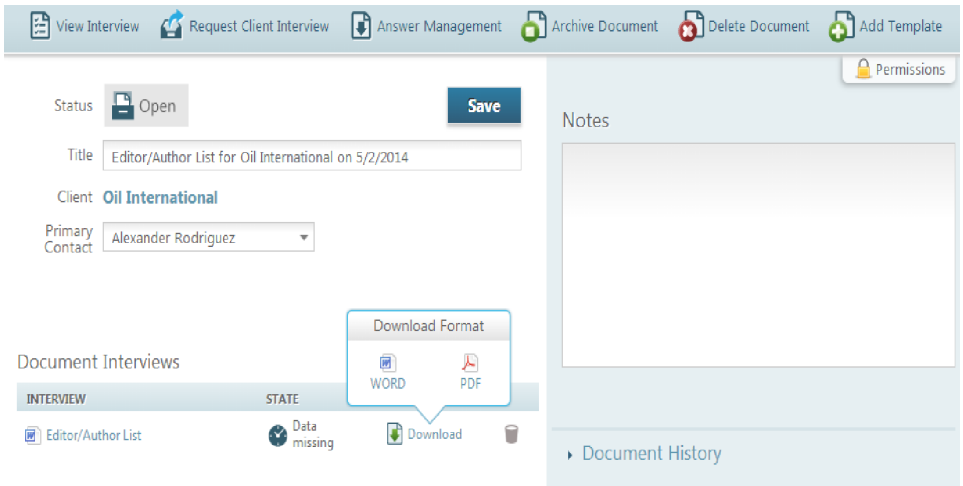
To create a new document:

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**.

Documents Tab Edit Page

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



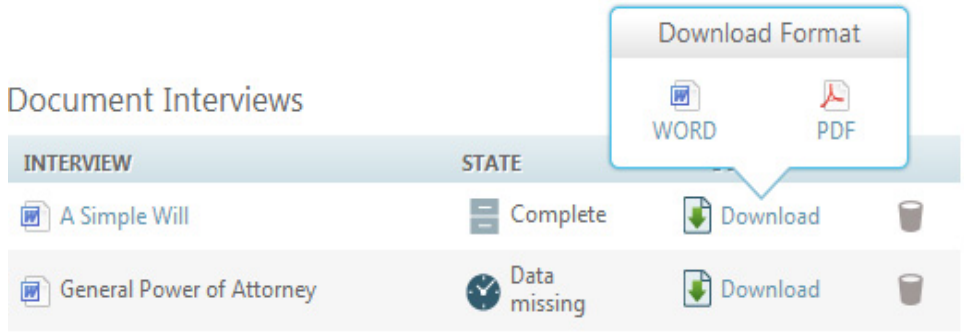
The Document Edit page provides several means to edit the data associated with a document. You can:

- 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 your native MS Word format, your Site Administrator may choose to restrict the download format for an individual document to PDF.

- 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** (if this feature has been enabled by your site Administrator), **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

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.

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.

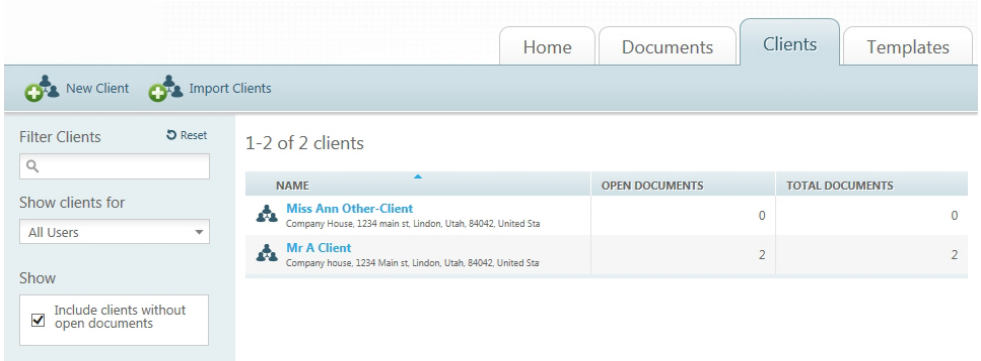
   You can also click the arrow to the left of the template list to expose the tag list panel where you can click to select a tag; otherwise, select a template directly from the template list.

   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

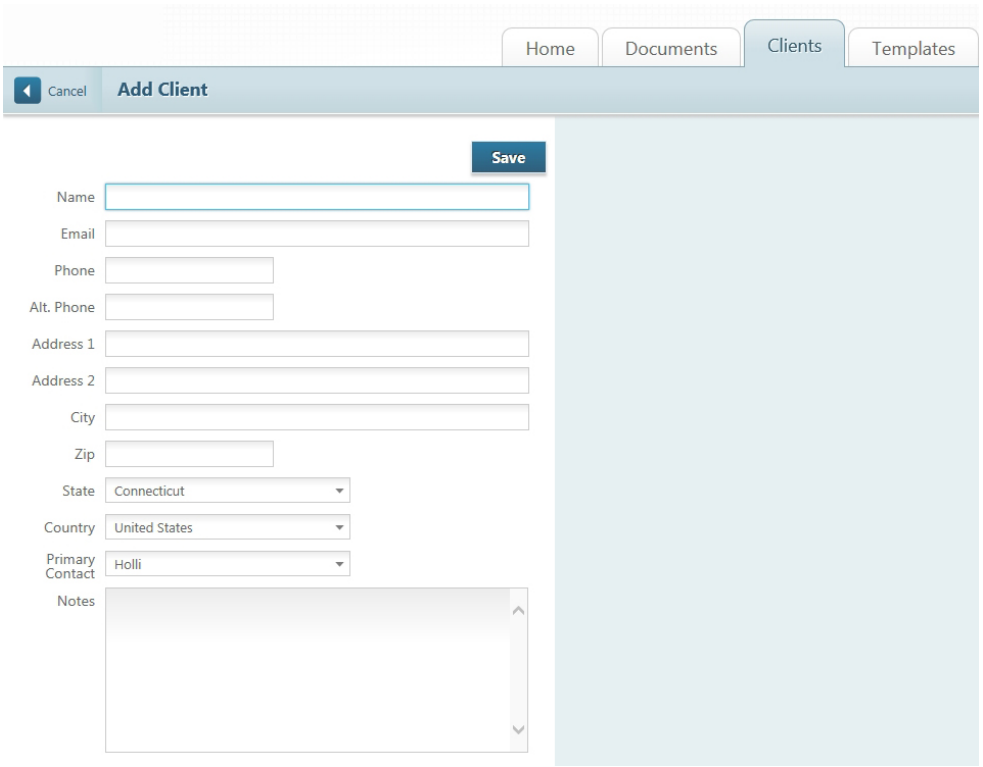
All of these components work interactively to arrive at a final display list. Changing your choice in any area affects the list displayed in the clients table.

Clients Tab Main Taskbar

The main taskbar under the Clients tab allows for creation of **New Clients** (below) or to **Import Clients** (page 15).

New Client Page

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

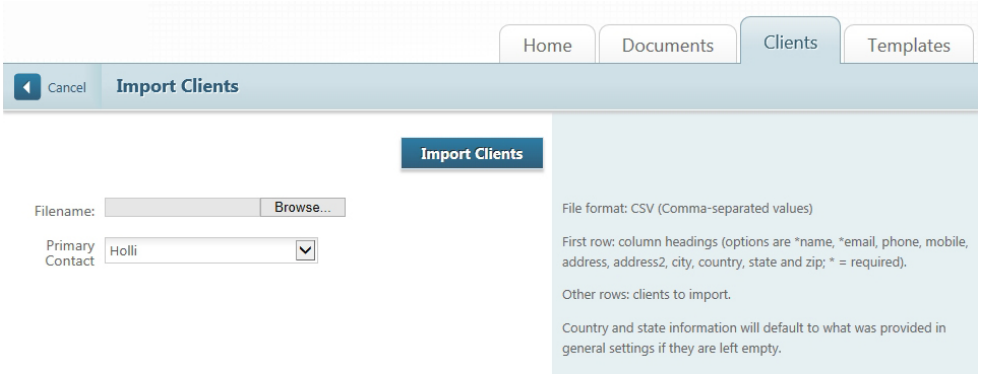


Type the client's details into the fields provided. The minimum details required are the **Name** and **Email** fields. The default **Primary Contact** for the client is the currently logged in user, however this can be changed by selecting another user from the drop-down list. Click **Save** once the 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:

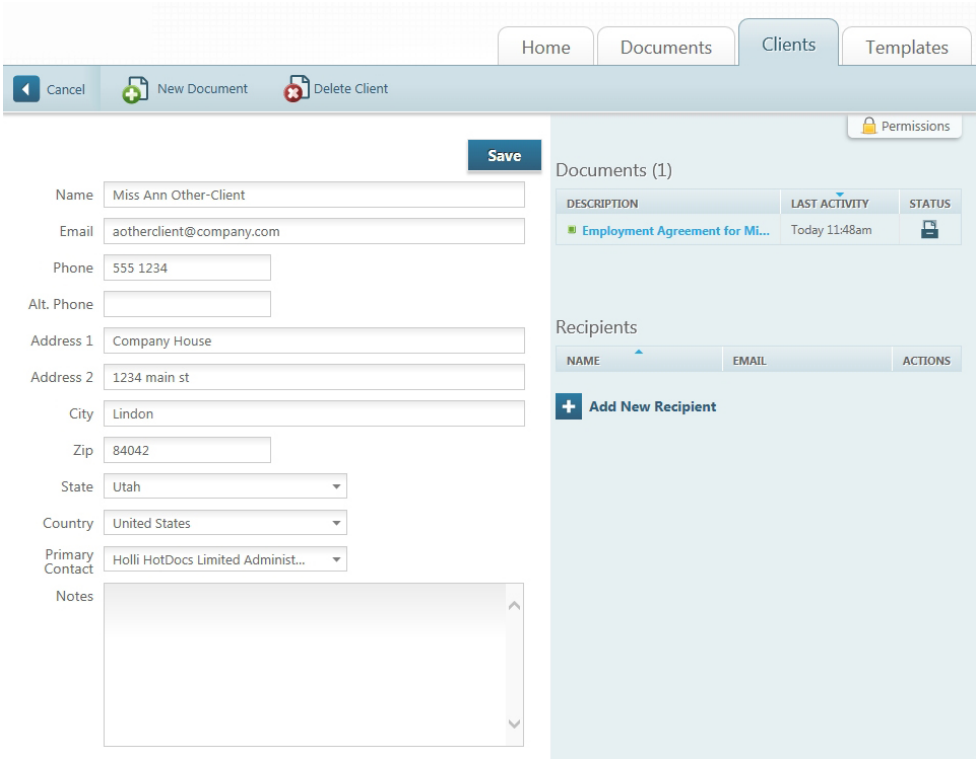
- **Description**—the title you supplied when you created the document

> **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.



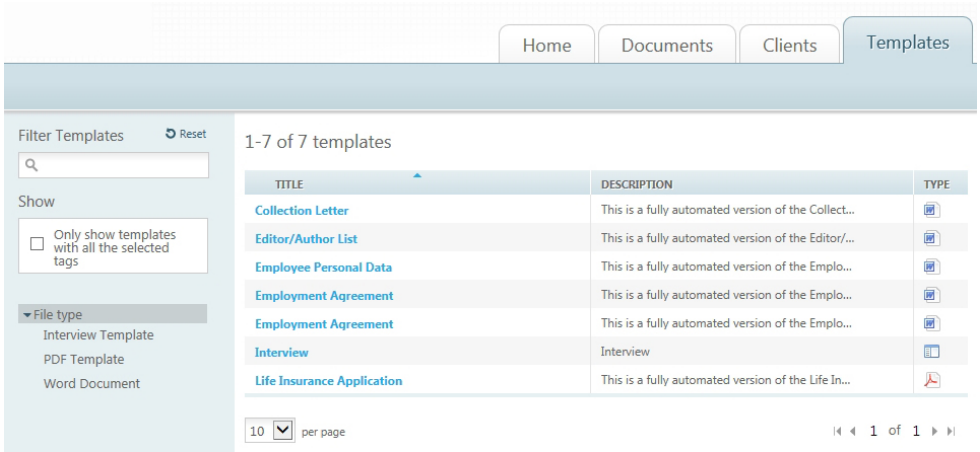
The **Recipients** are used in conjunction with the client interview feature. The recipient is the contact who can receive the client interview emails and will fill them out. Once a recipient has been added, their name and email information may be edited by clicking **Edit Recipient** in the **Actions** 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 9) 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**, and **Type**. Clicking on a template title in the Description column will open the New Document page with that template already selected.

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.

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 226 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.**