HOTDOCS DOCUMENT SERVICES

Getting Started in the Cloud

AT A GLANCE

- Sign up for *HotDocs Document Services*
- Receive contract order confirmation email
- Install or ensure installation of *HotDocs Developer 10.2*
- Receive firm provisioning email from *HotDocs Document Services* containing links and credentials to sign in
- Firm Admin signs into the application to set up the firm account under the Settings tab
    - Must agree to the terms of use
    - Firm general settings should be applied to allow firm branding / identification
    - Assign template taxonomies if you so choose
    - Understand that charges may be incurred for Client Interviews and Users
        - Accept responsibility and ensure number of users allowed for the firm
        - Determine if Client Interviews or Template Links will be used for your firm
    - Firm Users need to be added – any additional firm Administrators can be assigned at the same time
- Firm Admin can download the HotDocs Configuration File for one-click template upload from Developer 10.2
- Place Templates in customized Taxonomies for faster search results
- Download the component file if you would like to customize Templates to prepopulate and synchronize with online Client Interviews
- Create automated emails to Clients using 'Tokens'
- Enable your Templates to work on *HotDocs Server* and test assemble in Silverlight or JavaScript
- Upload server enabled Templates from *HotDocs Developer 10.2* to *HotDocs Document Services*
- Create new Clients
- Create new Documents for Clients
- 'Request Client Interviews' facilitates Client intake through email links
- Allow and place 'Template Links' on external web sites and social media pages to reach more clientele

Note: This Documentation has been created during development. All screenshots and steps may be slightly different from the product design that you see.

SETTING UP

- After your site is created within *HotDocs Document Services*, the Admin user will receive an email with a URL with your site name and a 'temporary' password to sign in to the new website. We recommend that you change this password after sign in.
- To sign in and configure your site settings, sign in with the Admin username (email) and the password provided in the email.
- If your site is ever unavailable, contact support@hdDocumentservices.com or, during business hours, call: 877.201.0150.
- The application is designed to direct Client correspondence to your firm. Only members of your firm, as HotDocs customers, can utilize our support for technical difficulties. 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 sign in password, click the sign in link: 'I forgot my password' which will allow for 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, task bars, panel areas, main content, and the footer.

BANNER BAR

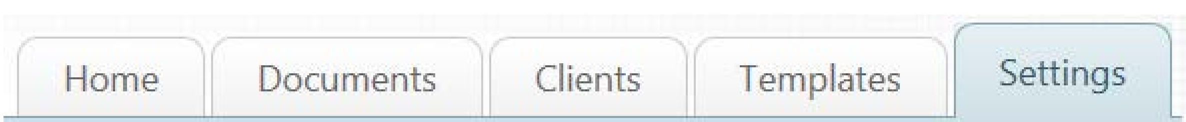
The banner bar is set to provide quick access to the Help menu and current user settings.

Help Menu - The help menu offers relevant content to the page where help is selected. The Help page will open in its own window 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 sign out and change account settings, including your password, and update user information.

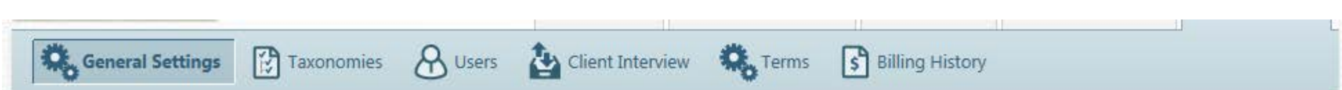
NAVIGATION TABS

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 only visible to Administrators.



TASK BARS

Task Bars 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 page, for example, consists of the following Administrative areas: **General Settings**, **Taxonomies**, **Users**, **Client Interview**, **Terms**, and **Billing History**.



PANEL AREAS

Panel Areas are sidebars designed to provide an overview or quick access to available links or filters for that page.

MAIN CONTENT

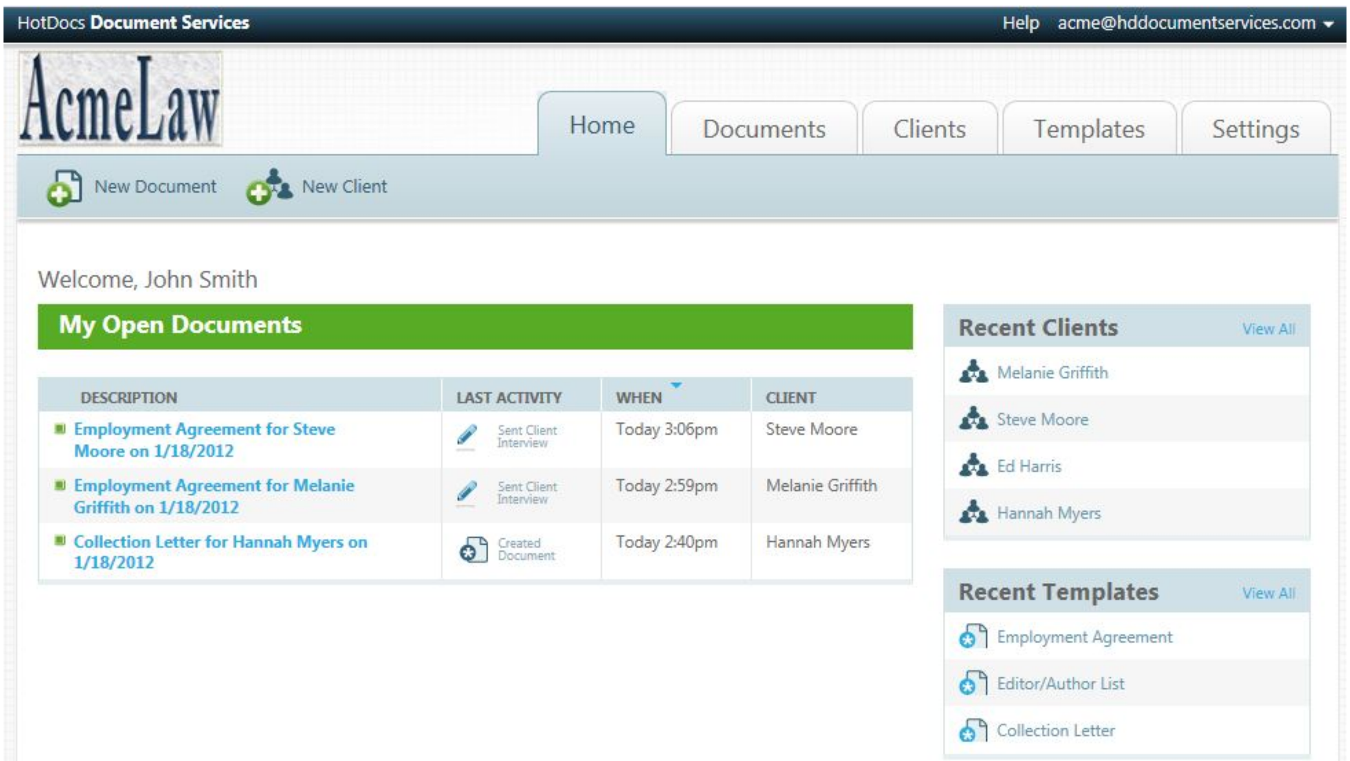
The **Main Content** area provides a detailed list of the prominent feature for the active page.

PAGE FOOTER

The **Footer** identifies copyright information, **'Powered by HotDocs'**, and **'Contact Us'** link for technical support.

HOME PAGE

The **Home** tab is the first page to appear once the sign in process is complete. It acts as a dashboard of site activity for the user currently signed in, allowing quick access to the most recently accessed Documents, Clients, and Templates.



HOME TASK BAR

The 'Task Bar' for the Home page provides quick creation of a **New Document** or a **New Client**.

HOME MAIN CONTENT AREA

The main content 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. Selecting the Document '**Description'** (Title) takes you to the 'Edit Document' page which allows, among other things, a Firm User to run interviews or request that a 'Client Interview' be sent.

RECENT CLIENTS PANEL

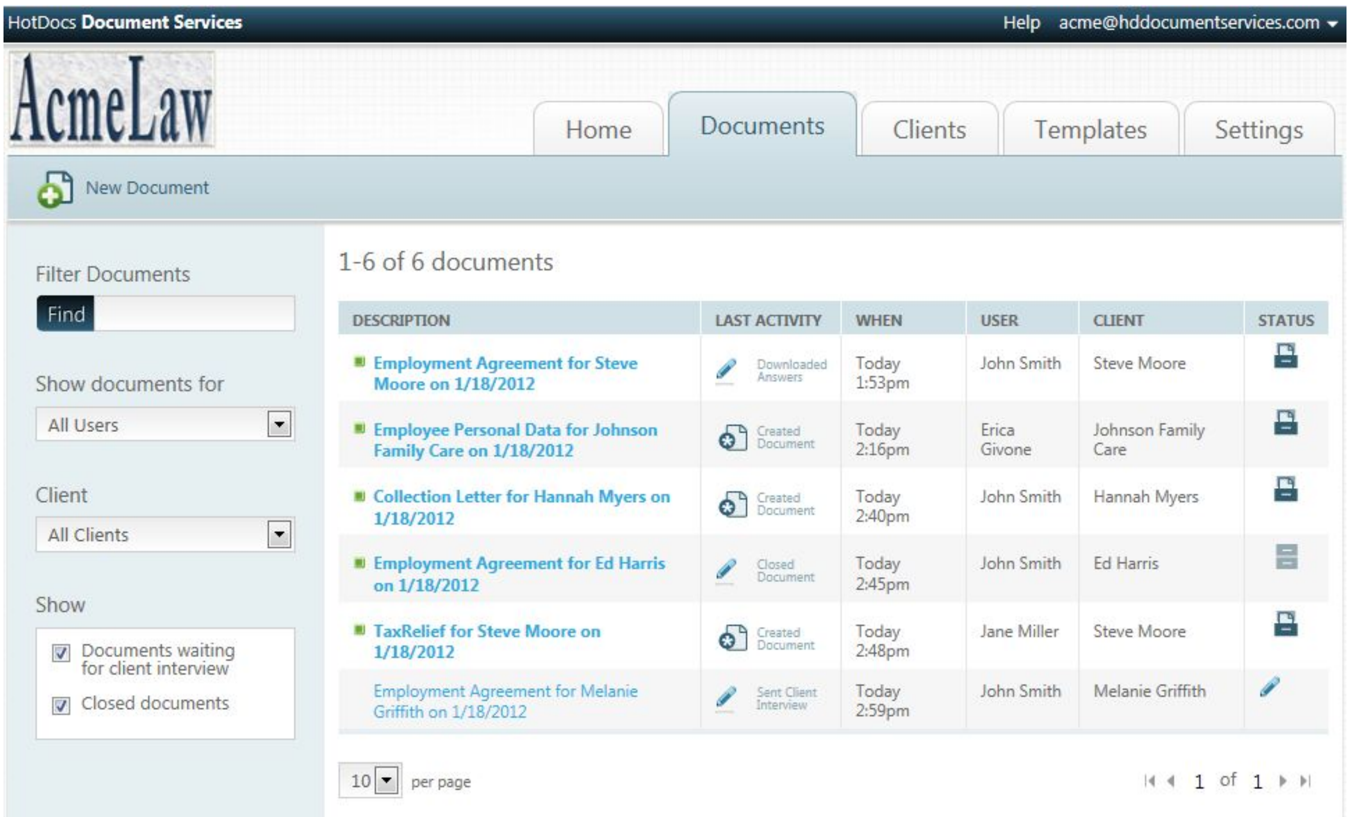
This panel contains a list of the most recently accessed Clients. The 'View All' link opens the **Clients** tab.

RECENT TEMPLATES PANEL

This panel lists Templates recently accessed. The 'View All' link opens the **Templates** tab.

DOCUMENTS PAGE

The purpose of the Documents page is to display Documents that have been created. It is the hub for viewing and managing Documents created from uploaded Templates. Documents can be created by Firm Users or from a Client Initiated Template Link. Conceptually, Documents are similar to 'work items' or 'matters' with the goal being completed document generation.



DOCUMENTS TASK BAR

The task bar for the Documents page provides quick creation of a **New Document** for a given template, user, and Client.

DOCUMENT PANEL

The main content of the Documents page provides an overview of Documents including: description; last activity performed on the Document; when the activity took place; the User assigned to the Document; the Client to whom the Document is attributed; and the current status ('Waiting for Client Interview', 'Open', and 'Closed').

FILTERING DOCUMENTS

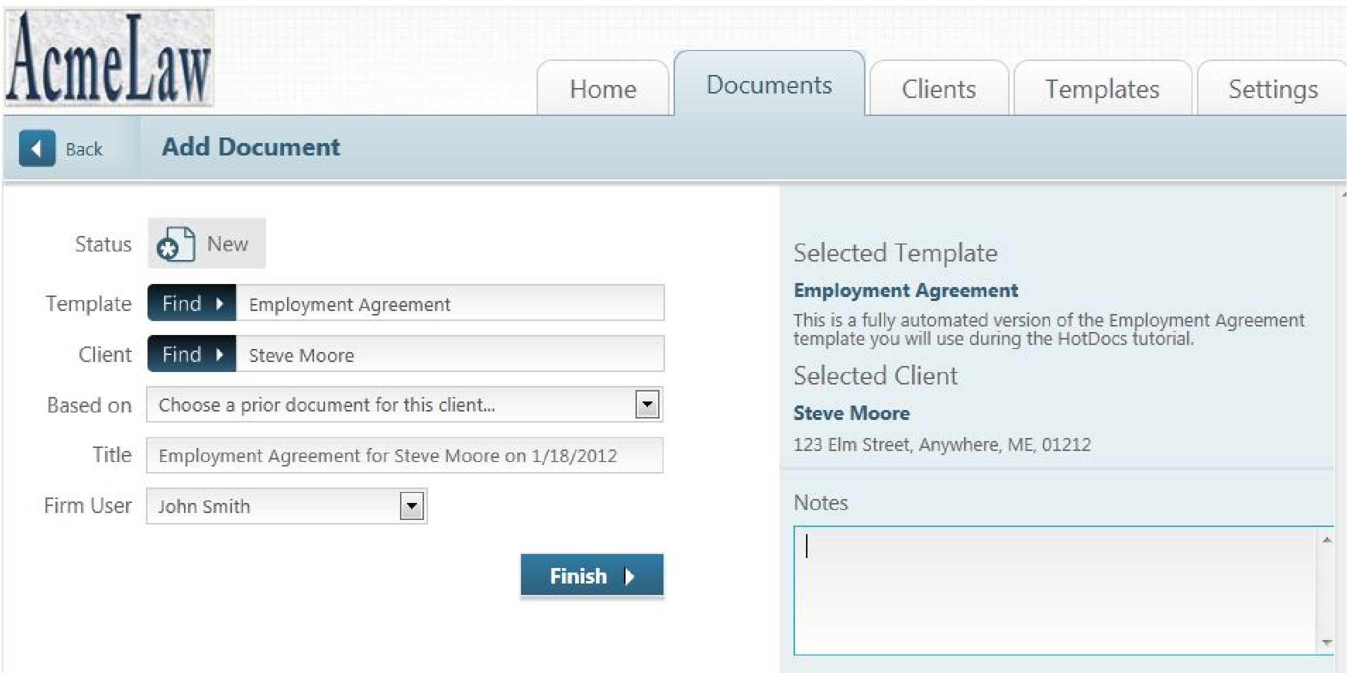
'Filter Documents' - enables items to be searched by keywords. When entering text into the 'Find' input box, the main Documents panel will be filtered automatically as the search criteria is entered.

'Show Documents for' - allows Document filtering by User and will be set by default to the currently signed in user.

'Client' -filter will limit Documents to just the selected Client or the default is to show Documents for all Clients.

'Show' - filters Documents by those waiting for a Client Interview and allows for the display of closed Documents.

CREATING A NEW DOCUMENT

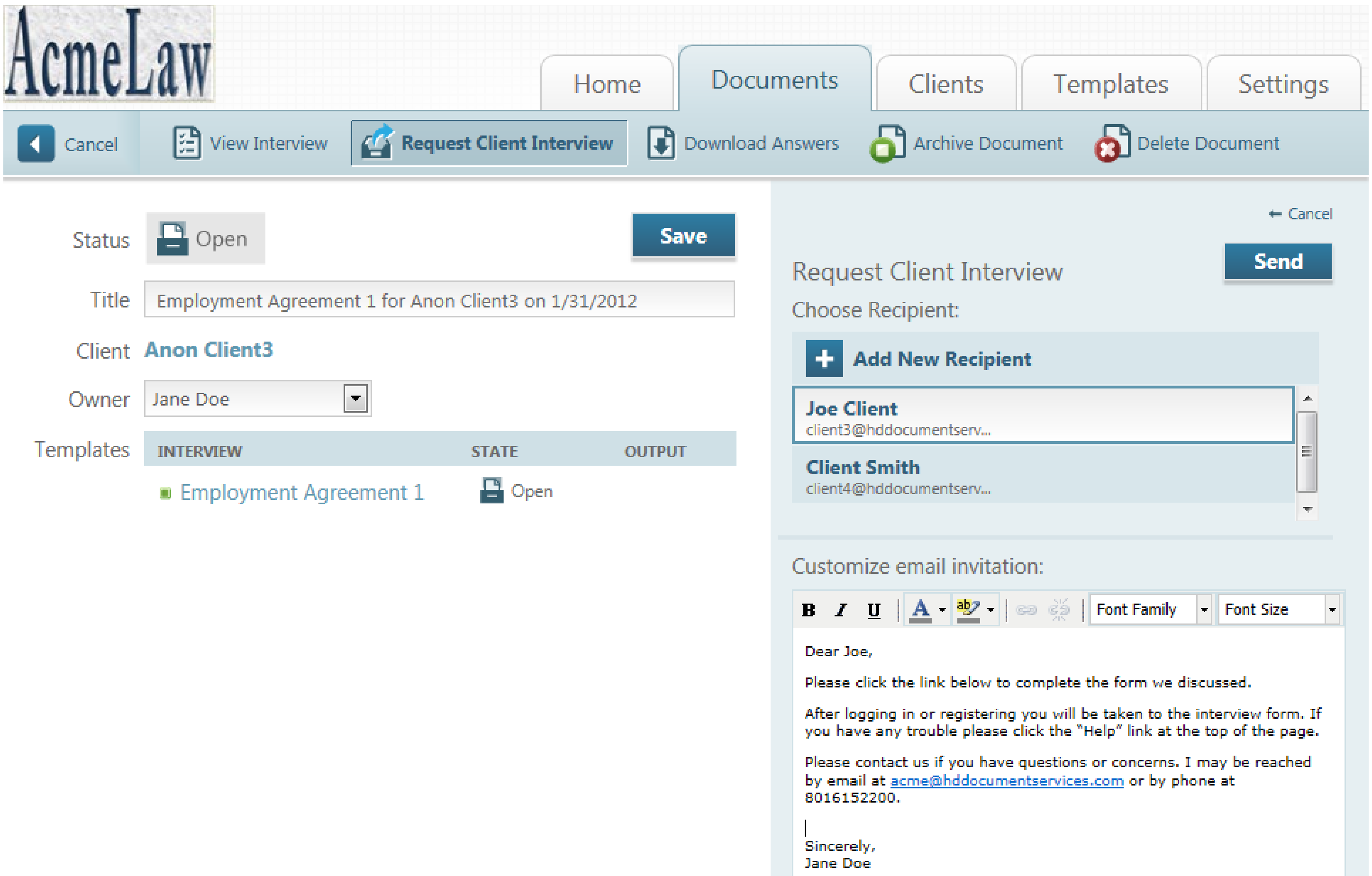


- A Template must be selected to create a new Document. Select an uploaded Template or search with part of the template name in the '**Find**' field. If Taxonomies have been created, a left arrow will appear to assist with filtering template results. Click the left arrow and filter by one or more taxonomy tags for the template sought. New taxonomies can be created by a Firm Admin to tailor your searches accordingly. Selecting 'Clear All' will remove all taxonomy filters applied.
- The '**Client**' field must be filled to create a new Document. A Client can be selected from the Client list displayed on the right or you can choose to '**Add New Client'.**
- The '**Based On**' field allows a new Document to have components prepopulated with a previously used Document for that Client. Alternatively, you can select '**Upload Answer File**' to populate the interview answers from a previous HotDocs Answer file.
- **Title** will be generated automatically from the selected template and Client names however; this can be changed simply by editing within the title field.
- **Firm User** is set by default to the currently signed in user, however this can be set to another Firm User.

- **Click the Finish button** to generate the new Document. Once a Document is created, it will be set to 'Open" in the Document Edit page.

DOCUMENTS EDIT PAGE

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



DOCUMENTS EDIT TASK BAR

The task bar for editing a Document provides quick access to the following buttons: **View Interview**, **Request Client Interview, Download Answers, Archive Document, and Delete Document**.

VIEW INTERVIEW

'View Interview' allows a firm user to preview the template, assigned to the selected Document, in an interview format.

REQUEST CLIENT INTERVIEW

'Request Client Interview' opens an email invitation to send an interview link to a Client or other Recipient for easy, online submittal.

DOWNLOAD ANSWERS

'Download Answers' prompts for an answer file to be saved locally to a PC, storage, or network location.

ARCHIVE DOCUMENT / REOPEN DOCUMENT

Selecting '**Archive Document**' will set the status of the Document to 'Closed', disable the option to send a 'Request Client Interview', and switch the Archive Document button to read 'Reopen Document' as its option.

If '**Reopen Document**' is pressed, it will reset the status of the current Document to 'Open', enable the option to 'Request Client Interview' and switch the text of the button to "Archive Document'.

DELETE DOCUMENT

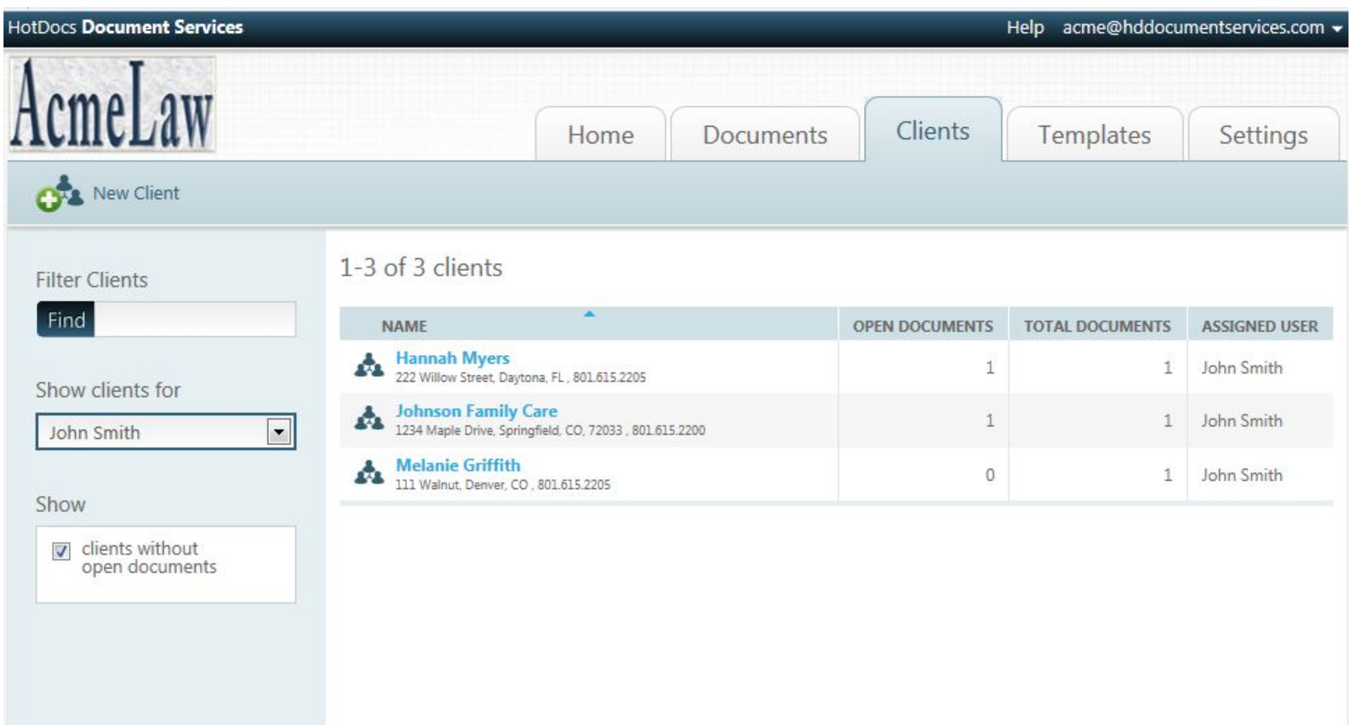
'Delete Document' allows for a Document to be removed from the online database.

DOCUMENT HISTORY

The 'Document History' panel shows all activities or transactions conducted with the document, to include the User that did them.

CLIENTS PAGE

The Clients page contains a list of Clients which identifies the number of Documents and the filter panel.



CLIENTS TASK BAR

The task bar under the Clients tab allows for quick creation of **'New Client'**.

THE CLIENT LIST

The main panel displays Clients for the currently signed in user. This can be changed in the filter panel. The Clients list shows the **Name**, a snapshot of the Client, the number of **Open Documents**, **Total Documents**, and the **Assigned User**.

FILTERING CLIENTS

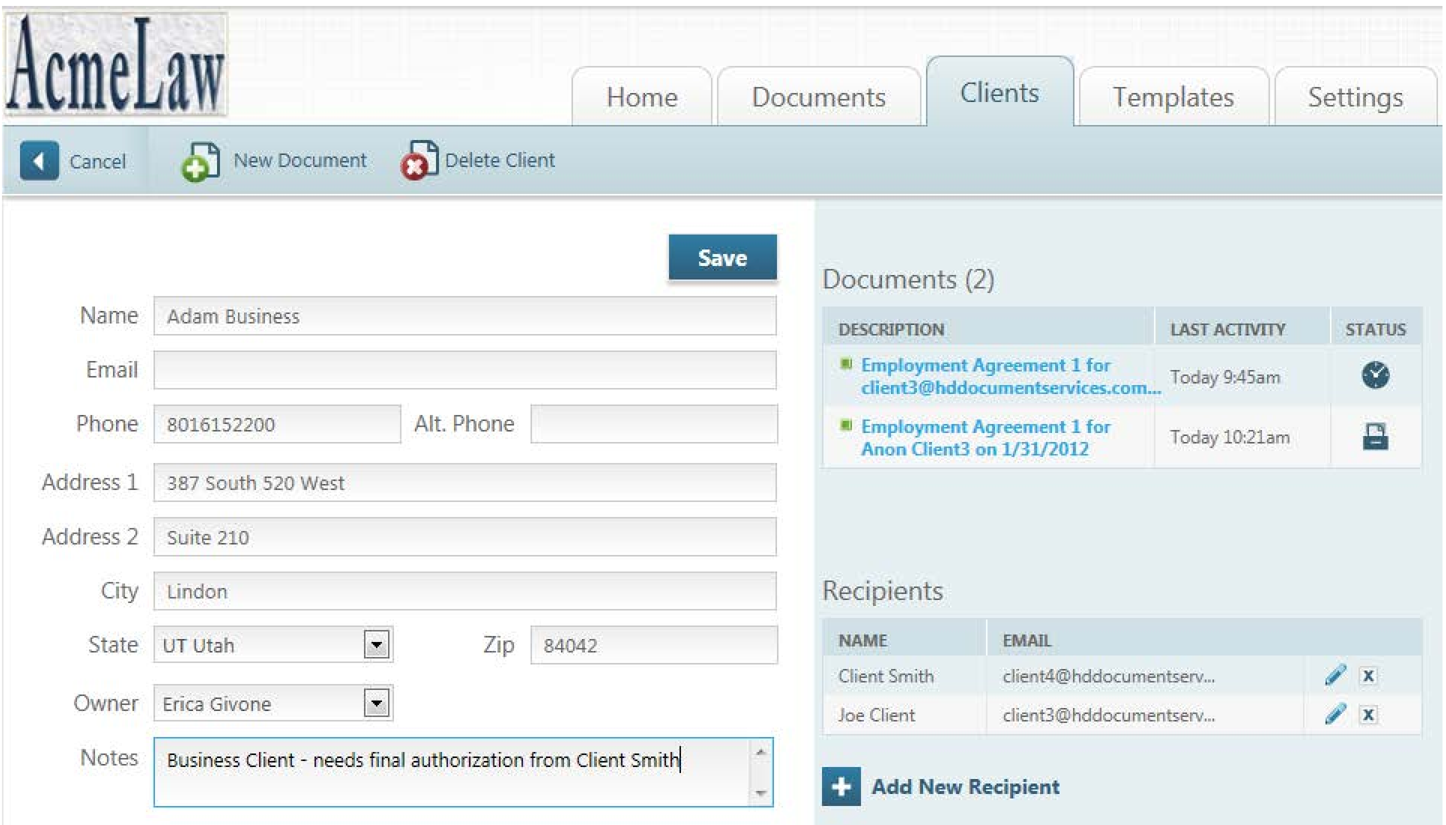
'Filter Clients' - enables Clients to be searched by keywords. When entering text into the 'Find' input box, the Client list in the main panel will be filtered automatically as the search criteria is entered.

'Show Clients for' – allows the option to view all Clients for all Firm Users.

'Show' - this checkbox enables the list to also show Clients whose Documents are not with a status of 'open'

NEW CLIENT PAGE / EDIT CLIENTS PAGE

Selecting **'New Client'** from the Clients task bar will open the 'Client Edit Page'. Selecting '**Name**' from the current Client, will open the 'Client Edit Page' to view Documents assigned, waiting, or completed for the Client. Additionally, if a Client is a business or other entity that requires multiple contacts to collaborate on interviews, you can view, edit, or add **Recipients** to a Client, thereby assigning the Document a sequential interview process.

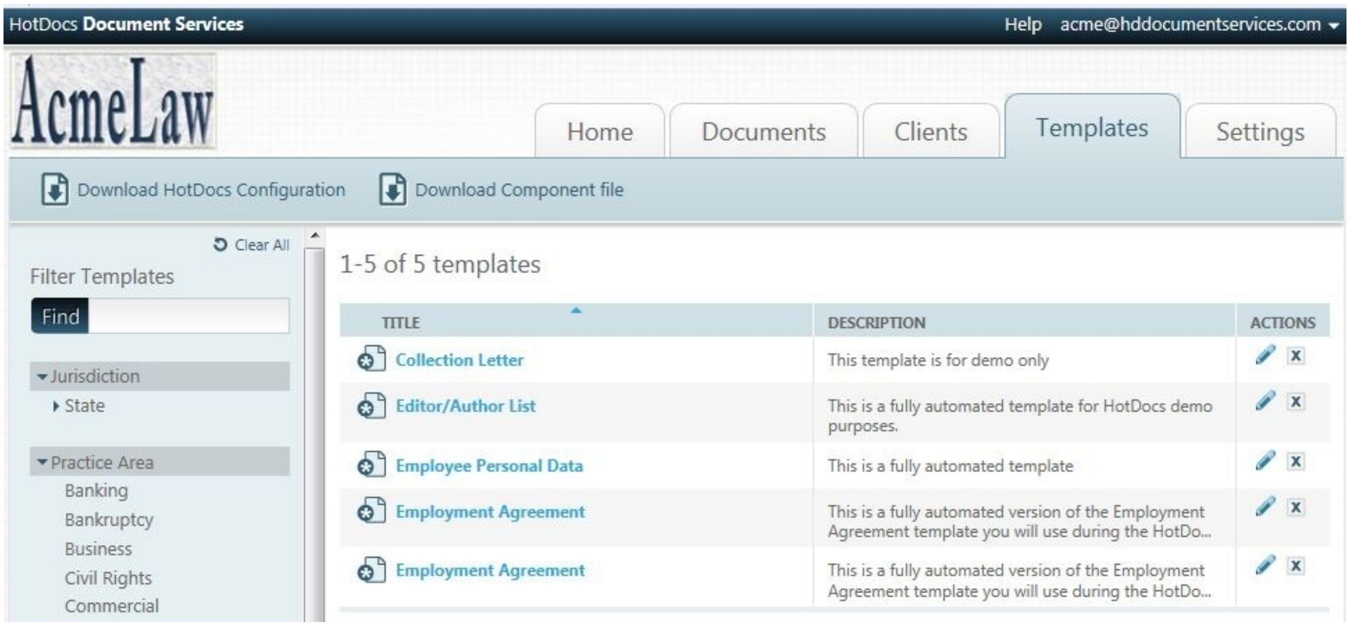


The Firm User attributed to the Client will be defaulted to the currently signed in user, however this can be changed by selecting another user from the dropdown list.

NOTE: DON'T FORGET TO CLICK THE SAVE BUTTON ONCE THE CLIENT DETAILS HAVE BEEN ENTERED.

TEMPLATES PAGE

The Templates page allows the user to search, edit, and view the Templates to which they have access. Templates are made available online to *HotDocs Document Services* by upload through *HotDocs Developer 10.2*.



TEMPLATES TASK BAR

The task bar under the Templates tab allows for quick access to '**Download HotDocs Configuration'** and '**Download Component File'**.

FILTERING TEMPLATES

The 'Find' field filters the template list by title, automatically, as search criteria is entered into the find box.

Taxonomy tags can also be used to filter Templates in the main content area. 'Clear All' will remove all filters and display all Templates.

THE TEMPLATES LIST

The main panel of the Templates page lists the Title, Descriptions 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.

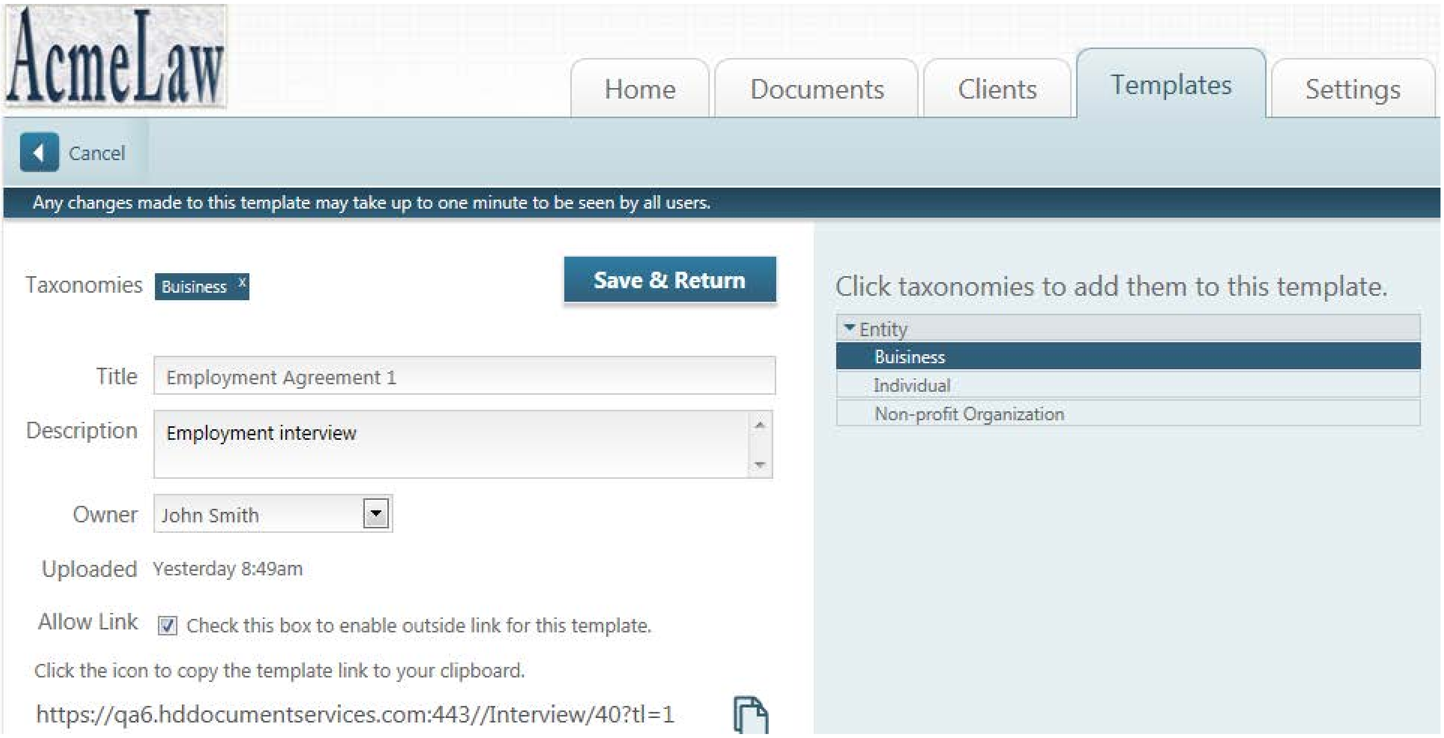
Delete Template - Caution - This action will delete the template for all users.

EDITING TEMPLATES

Template edits include: Taxonomy changes, Title, Descriptions, and Firm User assigned. '**Uploaded**' shows when the template was added to the site.

If 'Template Links' have been enabled by the site Administrator, the **Allow Link** can checked to display the URL to the template. Click the copy icon to place the template link on the clipboard to be placed on an external website or social media page. 'Save & Return'

NOTE: DON'T FORGET TO CLICK 'SAVE & RETURN'



TEMPLATE TAXONOMY

Templates can have a Taxonomy applied to them which facilitates searches and filters for a large number of Templates. If taxonomies have been created, they can be assigned when a template is first uploaded or a firm Administrator can apply taxonomy tags to Templates after they have been uploaded. See Settings / Taxonomies for more information on creating customized taxonomies.

ENABLE TEMPLATES FOR ONLINE SERVER

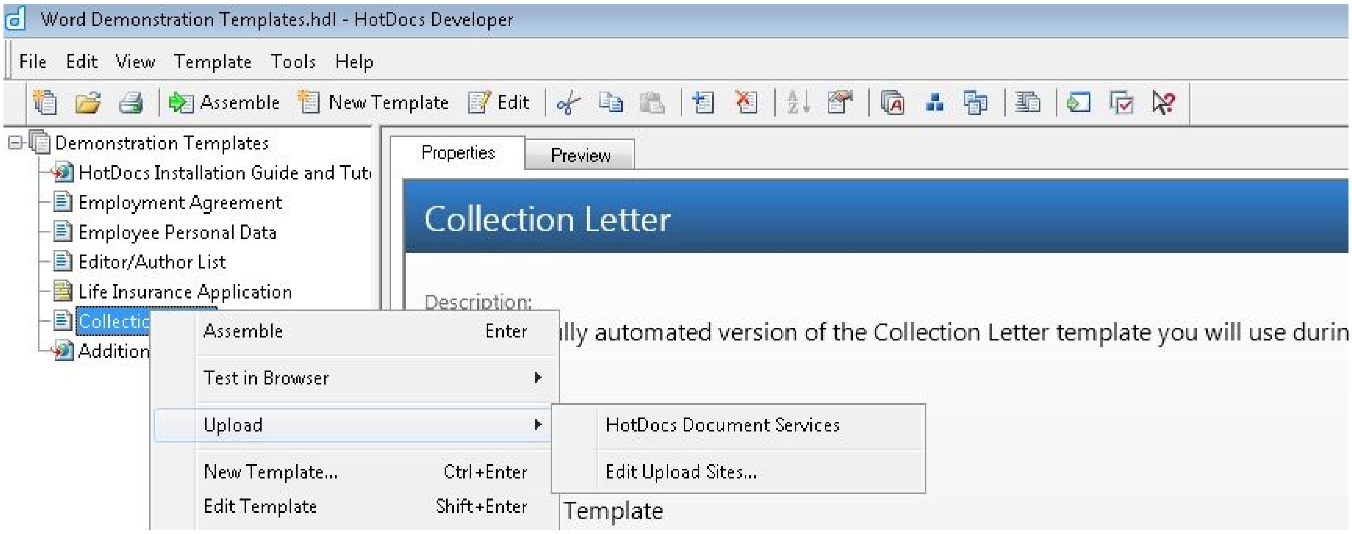
In order to upload Templates to *HotDocs Document Services*, they must first be enabled for *HotDocs Server*. It's best practice to test assemble in a browser to ensure that all functionality built into your Templates will be available on supported browsers.

Within *HotDocs Developer 10.2*, select the template you'd like to upload. Right click > **Test in Browser > Silverlight**. Testing a template with this method ensures functionality within the browser and enables it for *HotDocs Server*. If a template does not assemble correctly during a desktop browser test, it will not function properly when uploaded to *HotDocs Document Services*.

To learn how to make all new Templates enabled for *HotDocs Server*, within *HotDocs Developer*, go to: **Help > Home > All About... > Setting HotDocs Options > Template Development > Enable All New Templates for Use with HotDocs Server**

DOWNLOAD HOTDOCS CONFIGURATION

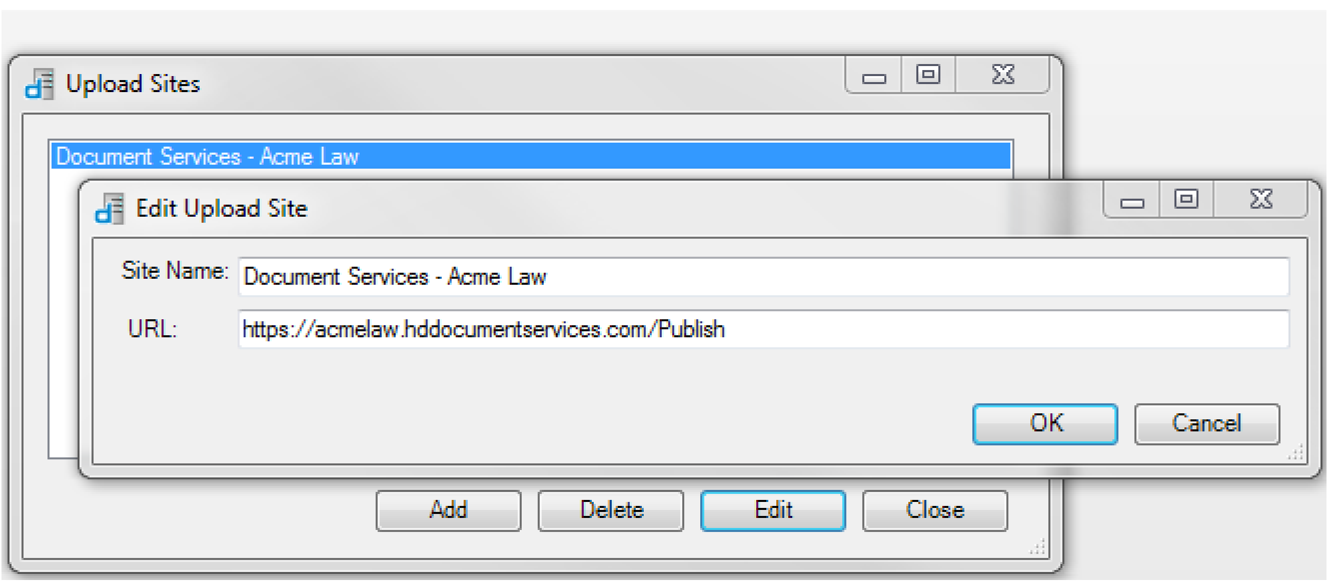
'Download HotDocs Configuration' will initiate a download file that configures *HotDocs Developer* for one-click connection to upload HotDocs Templates from *HotDocs Developer 10.2* template library to your *Document Services* site.



Once the configuration file has been installed, right click on a template(s) to upload and select the appropriate *Document Services* site. You will need to provide sign in credentials to upload a template to your site. Only firm Administrators can add Templates.

MANUALLY CONFIGURE TEMPLATE UPLOAD SETTINGS

To manually configure site settings for upload, right click any template and select **Upload>Edit Upload Sites…** Select **Add** and then give a name to the site. In the URL, type the full secure site name 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**



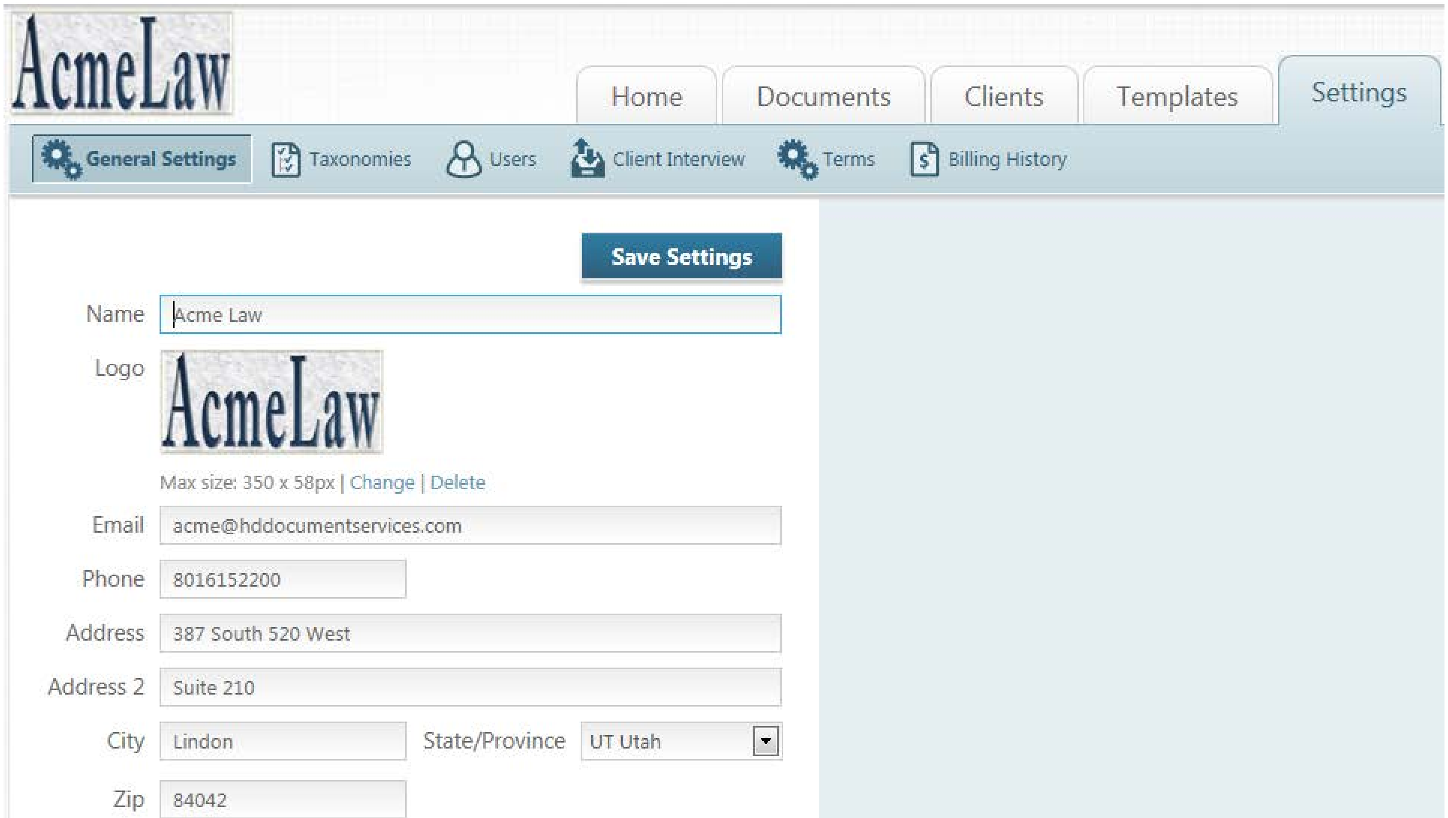
DOWNLOADING COMPONENT FILE

The component file download consists of specific *HotDocs Document Services* component fields. Create new Templates with these fields or modify existing Templates with these components to enable interviews to maintain continuity and be prepopulated with applicable data.

Note: Only site Administrators can download component files.

SETTINGS PAGE

The Settings page allows Site Admin to modify firm details; customize taxonomies; add, edit, and delete Users; modify Client Interview settings; view Terms; and see the current Billing History. The settings tab is only available to Firm Admin.



SETTINGS TASK BAR

The task bar allows quick access to **General Settings, Taxonomies, Users, Client Interview, Terms**, and **Billing History**

GENERAL SETTINGS

'General Settings' allow 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 will be used in place of the logo. Only site Administrators can modify 'General Settings'.

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

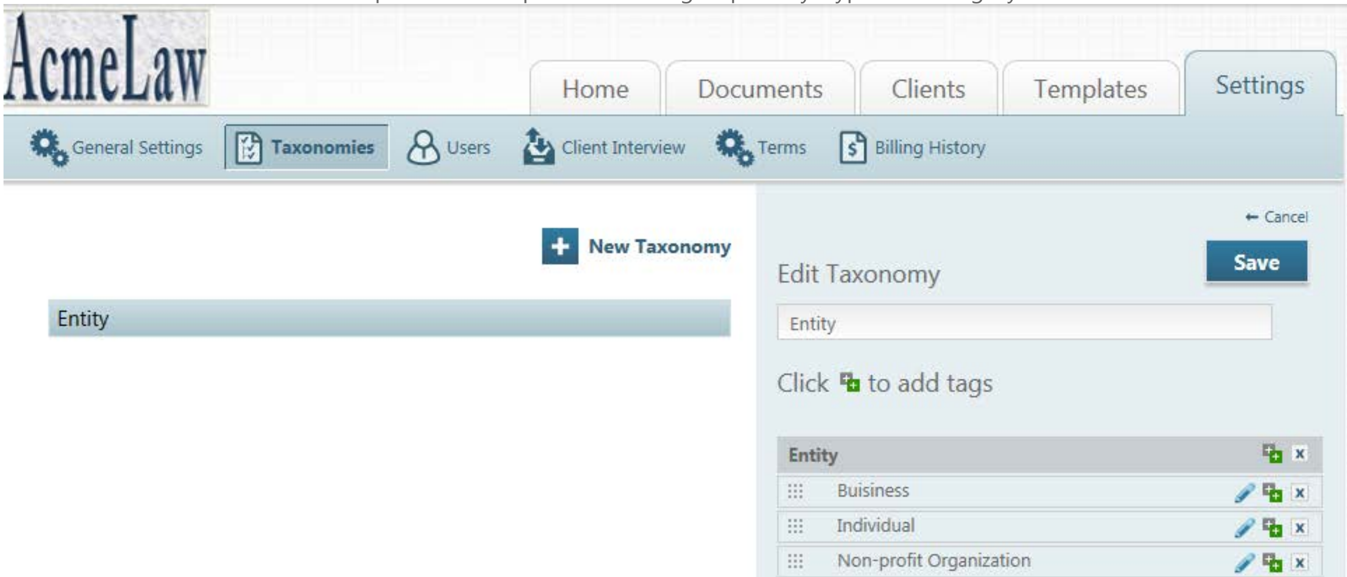
- Name - Enter the name of the firm. **
- Logo – Select your firm logo image file.
- Contact Email - Enter the contact email of the firm. **
- Phone - Enter the phone number of the firm.
- Address/Address 2 - Enter the address of the firm.
- City - Enter the city the firm is located.

- State/Province - Enter the state the firm is located.
- Zip - Enter the Zip Code.

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.

TAXONOMIES SETTINGS

The taxonomies feature allows uploaded Templates to be grouped by type or category to facilitate searches for site users.



Taxonomies created for your site will be located in the main content panel. Taxonomies can be collapsed or expanded to view the various tags assigned to them. Taxonomies are for convenience only and do not need to be assigned to any Templates.

ADD A NEW TAXONOMY FOR TEMPLATES

To add a new Taxonomy, click the plus button **New Taxonomy** in the main content area and then enter the taxonomy name you wish to use in the Edit Taxonomy panel. Click **Save**. The new Taxonomy should appear in the main content area.

ADD TAXONOMY TAGS

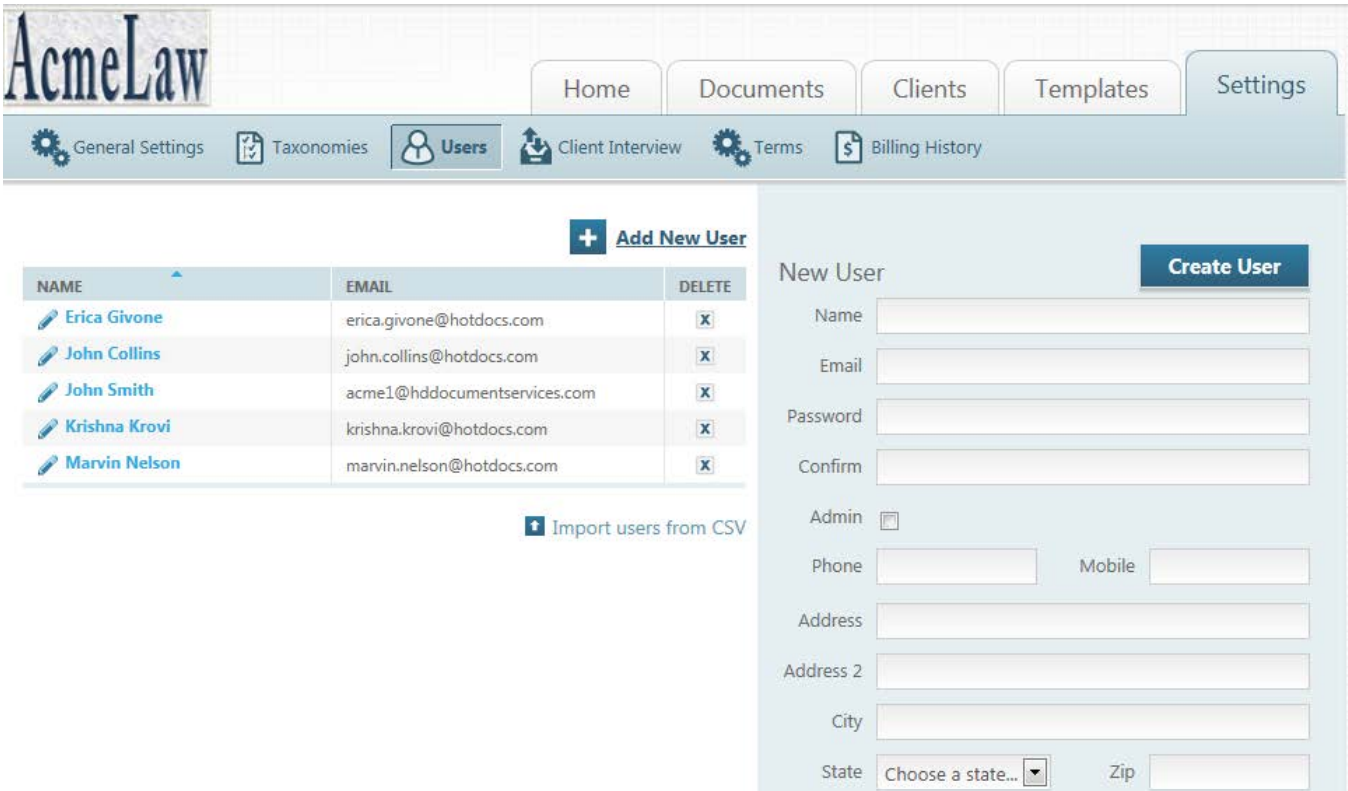
Taxonomy tags further refine the taxonomy category. To add a tag, click on the taxonomy name and in the 'Edit Taxonomy' panel, click the plus-plus button to the right of the taxonomy name. A text box will appear, enter the tag name and click the plus button. The tag will be added to the taxonomy group.

REMOVE A TAXONOMY

To remove a Taxonomy or Taxonomy Tag; select the applicable Taxonomy or Tag, click on the [x] button to delete. A prompt will appear asking for confirmation to delete the selected taxonomy.

USERS SETTINGS

The Users page provides the site Administrator with the option to add and remove site users.



TWO TYPES OF FIRM USERS

1. **Site User:** This is the standard user type with access to basic application functionality. All access to 'Settings' will be unavailable to Site Users. Unless elevated settings are required, most users should be of this type.
2. **Site Admin User:** This is the Administrator for the application. An Admin user has access to modify all available settings for the application, accepts terms of use, add users, and can enable configurations that can affect service charges incurred by the firm.

ADD A NEW USER

Click Add New User - the user information form will appear on the right of the screen. Enter the relevant user details into the fields provided. If the user being created is a Firm Admin User, tick the Admin checkbox. To finish the process, click Create User.

NOTE: *Not all details must be entered to create a new user. Only the Name, Email and password fields are mandatory however, it is recommended that all fields are entered. The User fields have tokens that can be set within default email text.*

When an Administrator creates a new user account, your organization may incur additional charges for the new user if the number of users exceeds the contracted number of users. A cautionary popup window will appear to serve as a reminder. To authorize additional charges, if applicable, click yes. The User will be added to the application.

ADD / IMPORT USERS FROM CSV FILE

If you have a large number of users to add, you have the ability to upload users from a CSV file:

1. The CSV file structure must be as follows:

a. **First row/line:** column headings (*name, *email, Admin, password, phone, mobile, address, address2, city, state, zip)

   * = required

b. **Other rows/lines** – one line/row per user to import.

c. File format: CSV (comma spaced values)

2. Click the link, '**Import Users from CSV**', the import setting will be displayed.
3. Click **browse** to locate the CSV file that contains the user details.
4. Click Submit.
5. The additional charges confirmation will display.
6. To accept these conditions click yes.

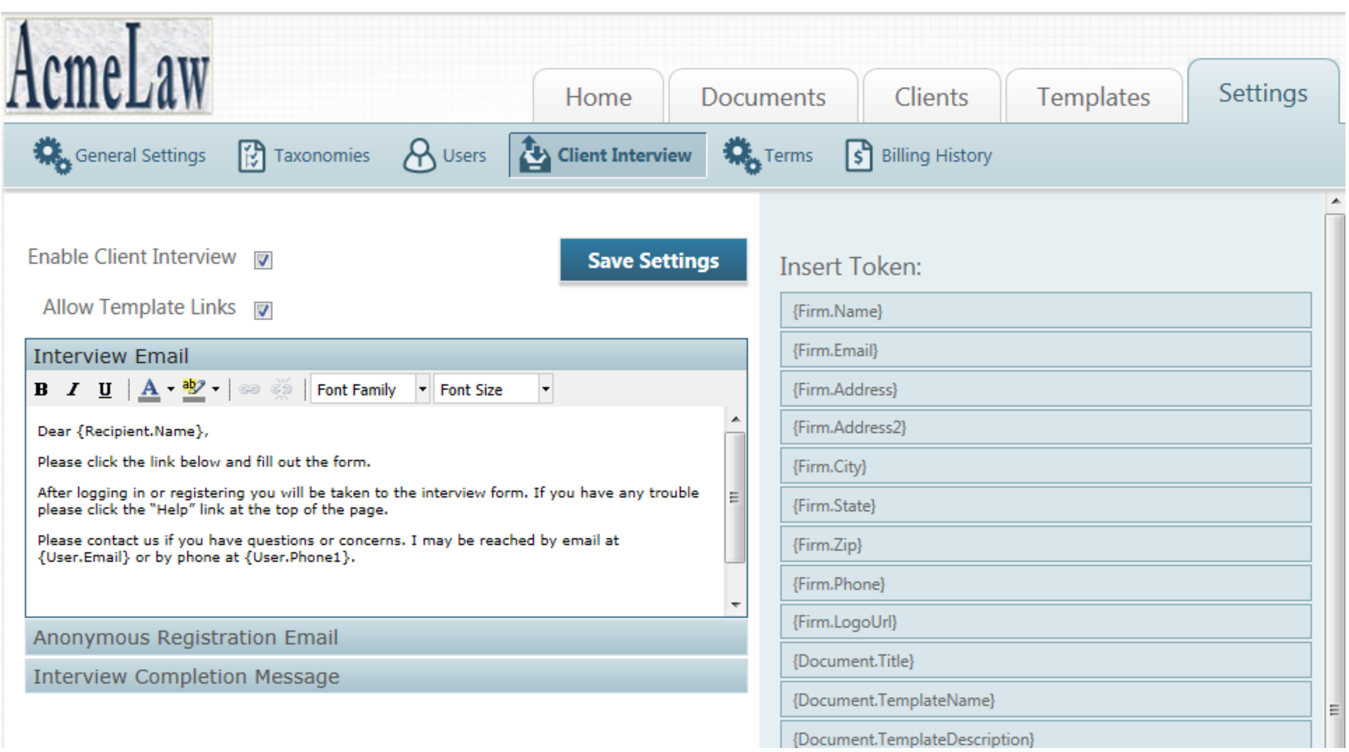
Edit user details: Click on the user's name, the user details will appear on the right of the screen. Any of the user detail fields may be edited. To change the user's password, click the change link. Password boxes will appear. Enter the new password, confirm it and then click Save. The password will be updated.

CLIENT INTERVIEW SETTINGS

The Client Interview page provides access for firm Administrators to **Enable Client Interview**, **Allow Template Links**, and provides the customization of Client correspondence. All communications can be customized through the text editor provided. Common text customizations include: Font, Size, Color, etc.

CLIENT INTERVIEWS

A Client Interview is a feature that allows a Firm User two (2) options to distribute interview links to one or more Clients. Interviews can be submitted by sending a Document via 'Request Client Interview' or a 'Template Link' can be copied to an external website.



ENABLE CLIENT INTERVIEW

Firm Administrators must first check the box to **Enable Client Interviews** in order for a request for a Client Interview to be sent.

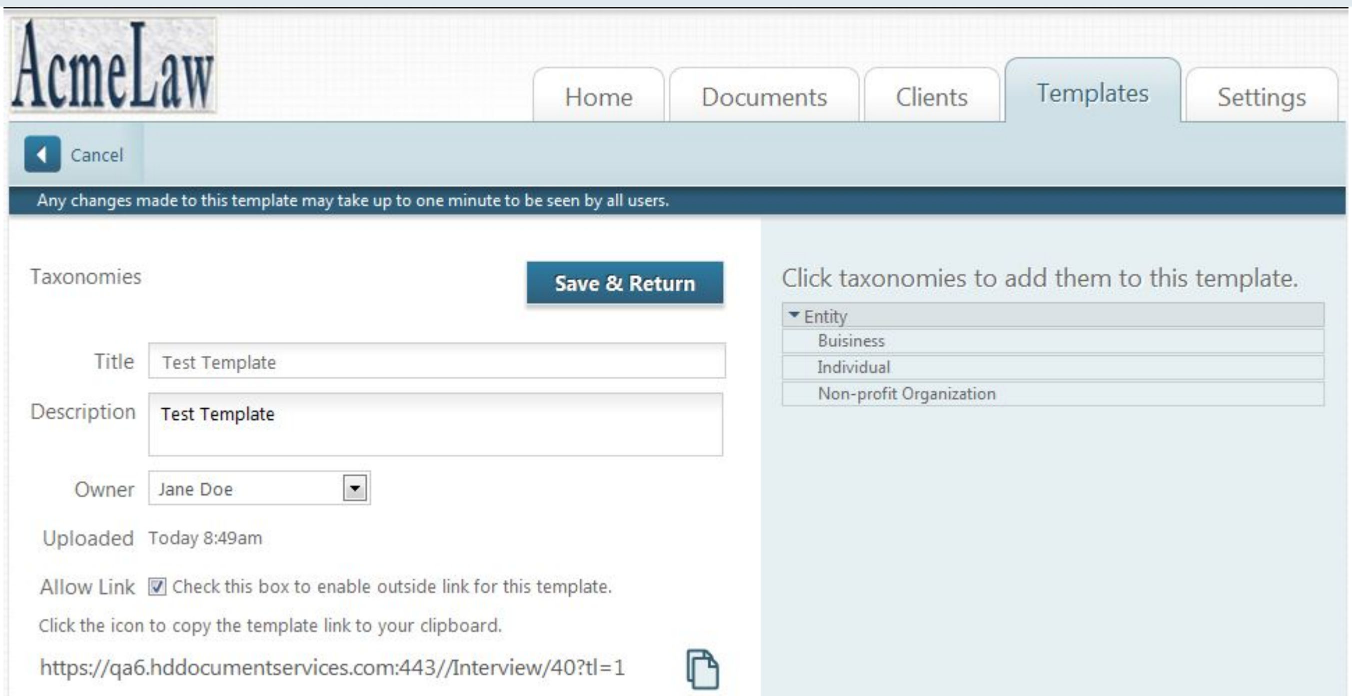
Client Interviews may incur additional Transaction charges to the firm and only firm Administrators can accept the terms and enable Client Interviews to be distributed. Please contact your HotDocs sales representative at 1-800-500-3627 or sales@hotdocs.com for questions about options and pricing.

To initiate a request for a Client Interview, you must first create a Document. From the Edit Document Page, select Request Client Interview and assign a recipient(s) to receive the email. The Client email address and name is selected by default but collaboration Firm Administrators must first check the box to **Enable Client Interviews** in order for a request for a Client Interview to be sent.

ALLOW TEMPLATE LINKS

A firm Admin can also choose to **Allow Template Links** which provides the opportunity for *Clients* to initiate the Document creation process. If the firm has a public facing website or social media site, links to interviews can be placed externally, whereby an anonymous / new Client can register with the firm and then complete an interview.

NOTE: Template Links may incur additional Transaction charges to the firm and only firm Administrators can accept the terms and Allow Template Links to be distributed. Please contact your HotDocs sales representative at 1-800-500-3627 or sales@hotdocs.com for questions about options and pricing.

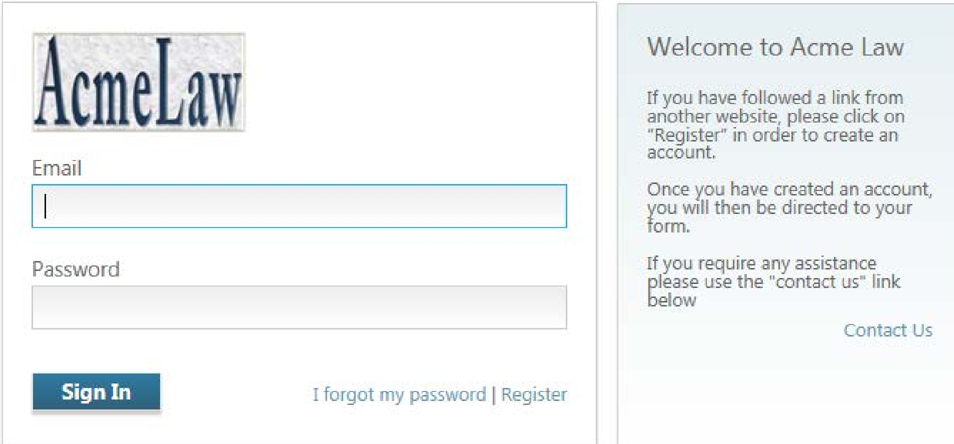


To create or copy a template link, open the Templates page and click edit for the template to which you'd like to provide a link. Place a check mark next to **Allow Link** and then click on the copy button to copy the link to the clipboard.

Note: you must click on Save & Return in order to save the setting that will Allow a Link for that template to be active.

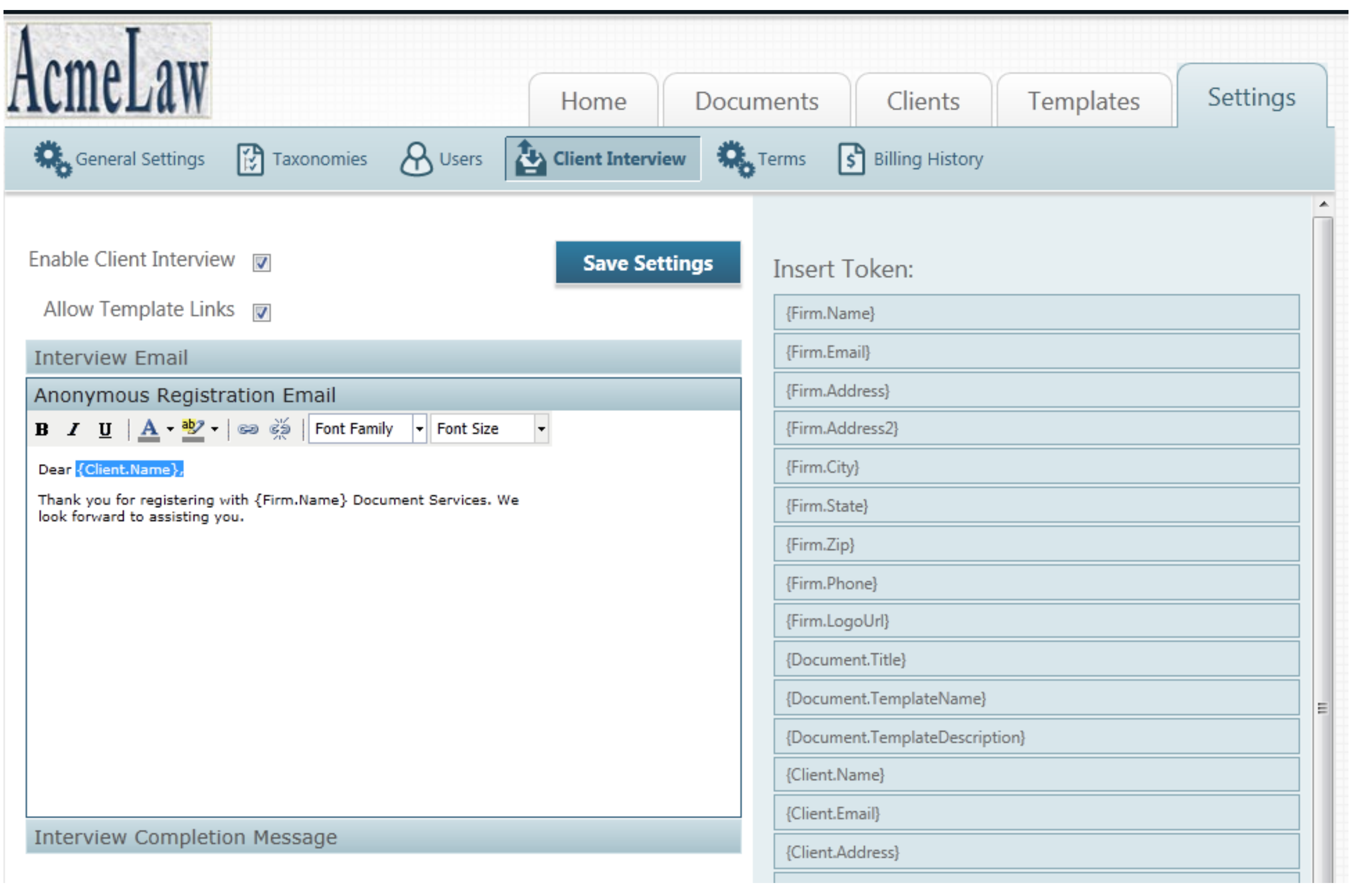
A confirmation window confirms that the interview link has been copied to the clipboard. Paste the link on an external website to allow Clients to register with your firm and run an interview. Transactions accrue for each submitted interview.

Clients that follow a template link, have the option to sign in if they are already a Client, or they can register as a new Client. If **Allow Link** was not saved, a permission error is encountered upon sign in.



TOKENS

Tokens are preset fields which can be added to the default text of emails. To add a token, place the curser where you wish the token to be displayed. Click the token from the token list panel on the right. The token will appear in curly brackets as a placeholder to be added to the Document with the actual content you wish to have included in the email and will be visible when the email or popup message is generated.



INTERVIEW EMAILS

Interview Emails are sent to a Client with the request to fill out an interview and contain three (3) key items:

1. The interview link that will automatically direct Clients to the site sign in page
2. The username is the email address to which the interview was sent
3. The temporary password for newly assigned Clients

ANONYMOUS REGISTRATION EMAIL

Anonymous registration Emails are sent to Clients when they register as a new Client on the site in order to complete an interview the first time.

INTERVIEW COMPLETION MESSAGE

Popup message that will be visible to a Client once they have completed a Client Interview.

TERMS

Terms of use are accepted by the first Admin to sign in to *HotDocs Document Services*.

BILLING HISTORY

Billing History provides an easy snapshot of the number of transactions that have been submitted by all clients and all users.

The logs display the number of Client Interviews that have been received from clients. This includes client-initiated interviews submitted from Template Links.

Logging history defaults to display all user transactions within the current month, but filters are available to facilitate client billing.

Note: Only the first 100 Client Interviews are free. Each additional interview submitted thereafter results in a transaction fee.

OTHER APPLICATION NOTES

COLLABORATION AND DOCUMENT RECIPIENTS

A collaboration feature exists for Client Interviews whereby various staff, of a business client, are required to provide input in order to finalize a Document. A Firm User can create a series of "Recipients" for a Client to assist in Document collaboration.

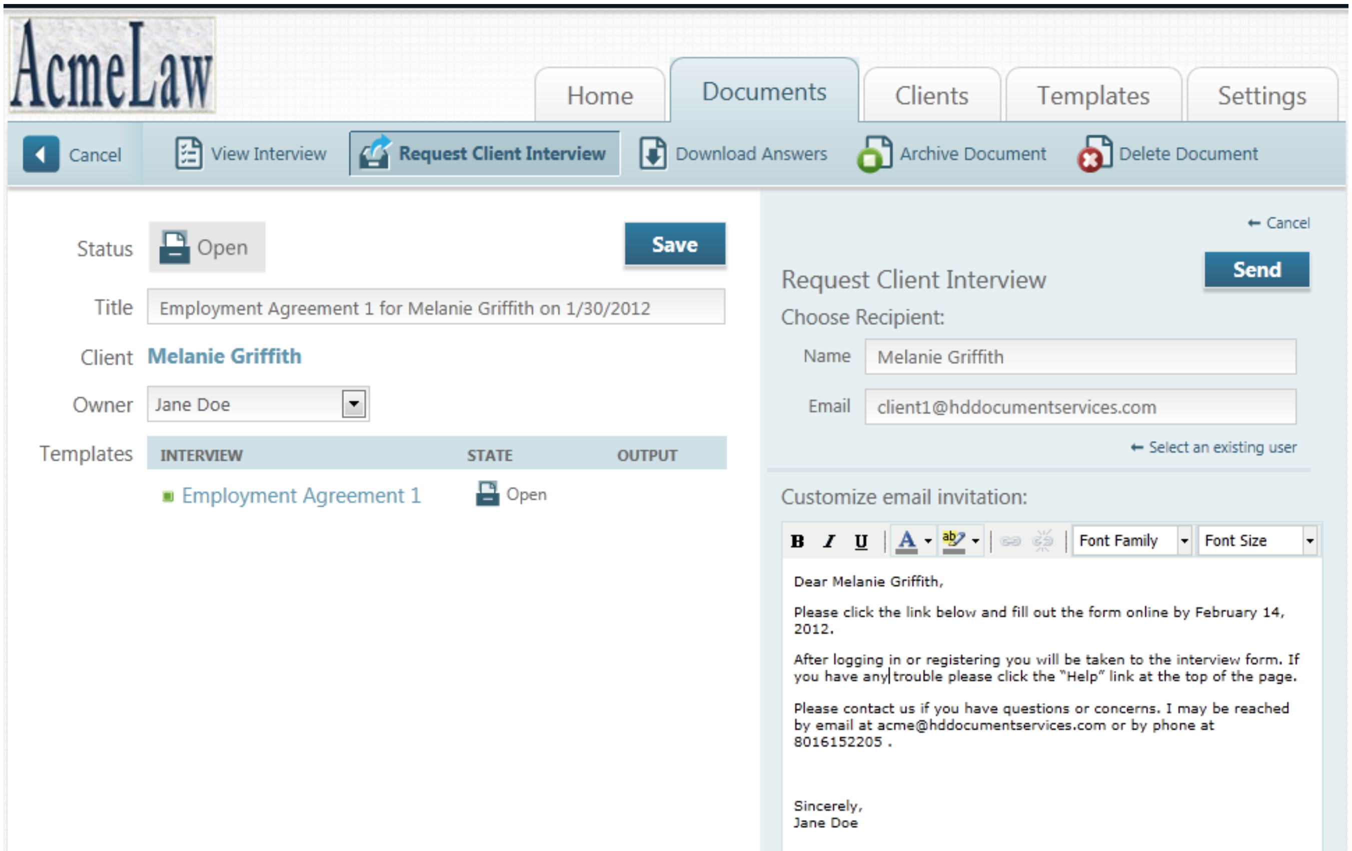
NOTE: THE FINAL RECIPIENT TO MAKE CHANGES WILL OVERWRITE ANY ANSWERS PROVIDED BY PREVIOUS RECIPIENTS. THIS WORKS BEST IN AN APPROVAL OR DECISION-MAKING WORKFLOW, WITH THE FINAL REVISION MADE BY THE LAST PERSON IN THE APPROVAL OR DECISION-MAKING PROCESS.

There is no versioning to the answers saved online within the application, therefore, unless answers are downloaded by previous recipients, any prior changes will be overwritten.

If unique answers are wanted for each client, then collaboration is not the feature to use. In that case you would create a separate document for each client.

REQUEST CLIENT INTERVIEW PROCESS

1. A Firm User initiates a 'Request Client Interview" from the Document Edits Page, selects a recipient of the Document which sends an email to the addressed Client with a link to the interview.



2. The Client receives the email from the Firm User which can be customized prior to delivery to contain specific instructions, Document details, and registration information for the Client.
3. The Client clicks on the embedded link within the email which takes them to the firm's sign in page for Client Interviews provided by HotDocs Document Services.
4. The Client can then sign in to the firm's site with the credentials provided by the firm.
5. Once signed into HotDocs Document Services, Clients are taken directly to the assigned interview.
6. Clients can save their work and return to the same interview with the same link from the initial email until the interview is submitted or until the Firm User, assigned to the Document, marks it as complete.
7. Once the Submit button is clicked at the end of the interview, the Firm User assigned to Document will receive a confirmation email.

CLIENT INTERVIEW EMAILS

When a Client Interview is sent to a Client, three key features of the email need to be noted: The URL or hyperlink to the Document created for that Client, the username is the email address to whom it was sent, and the temporary password that is generated for all new Clients and included under the Interview hyperlink.

After signing in with the username (email address) and the temporary password from the email, all Clients will be asked to create a new secure password.

Minimum requirements include: 7 characters long, at least 1 uppercase, 1 number character, and at least 1 special character.

The following is a sample email received by Client "Melanie Griffith":

Dear Melanie Griffith,

Please click the link below and fill out the form online by February 14, 2012.

After logging in or registering you will be taken to the interview form. If you have any trouble please click the "Help" link at the top of the page.

Please contact us if you have questions or concerns. I may be reached by email at acme@hddocumentservices.com or by phone at 8016152205 .

Sincerely,
Jane Doe

Click here to answer the interview questions:
https://qa6.hddocumentservices.com:443/HotDocs.Web.Assembly/ClientAssembly/Interview?interviewId=49

Your temporary password is: **3i:mT2l2xh**

To login use your email address as the username and the temporary password provided above. Once you login you will be prompted to change the password

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Terms of Use

The link will take you to the HotDocs Document Services website operated by HotDocs Corporation on behalf of Acme Law for the limited purpose of using Acme Law services and content. HotDocs Corporation is a Delaware Corporation with its principal place of business at 387 South 520 West, Suite 210, Lindon, Utah 84042, USA. You may use the website only on the strict condition that HotDocs Corporation disclaims all liability and duty of care to you in connection with your use (or loss of use) of the website, any data you upload using the website, and any materials created or downloaded from the website. This disclaimer does not affect the legal obligations between you and Acme Law.

SUPPORT

CONTACT US

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

Clients who utilize the Contact Us form will have their emails submitted to the Firm User assigned to the document or Template.

Firm Users 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, a 'I forgot my password' link, if they believe they are already a Client at the firm, and a 'Contact Us' link on the sign in screen to send a request for support from the firm.

ONLINE HELP

Available within the application, the **Help** link 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.