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DOCUMENT MANAGEMENT, ASSEMBLY & PDF TOOLS

BUYERS GUIDE: 2021 EDITION



HOTdocs™

Automate Your Document Creation Process While Reducing Complexity and Minimizing Risks

“AbacusNext’s HotDocs Advance is for any organization that needs to produce documents repeatedly and consistently as part of their business processes and work product.”

Company Name Brand
AbacusNext

Product Name Brands
HotDocs, AbacusLaw, Amicus Attorney, Amicus Online

Latest Developments and Updates

- Add placeholder fields to templates for users to upload images in interviews.
- Create custom events in interviews with the interview event dialog element.
- Populate templates with default answers using HotDocs Advance workgroup settings.
- HotDocs API downloads answer sets in XML and JASON format to quickly pass them to a persistent memory program.

Building a Better Document

There’s a dangerous and risky action that takes place in law firms every day. When someone needs to create a document, they will often open an old document and tediously attempt to replace the names, dates, and pronouns in order to create a new document with Save As instead of Save. Inevitably, something will be missed, resulting in an embarrassing and potential blunder that could easily have been

avoided through the use of document automation software.

AbacusNext’s **HotDocs Advance** is for any organization that needs to produce documents repeatedly and consistently as part of their business processes and work product. The HotDocs document assembly platform generates complicated and customer-specific documents for law firms and other organizations. It transforms frequently used forms into reusable templates allowing you to create accurate, customized documents in Microsoft Word and PDF format.

The document assembly platform from AbacusNext comes in two parts: HotDocs Author and HotDocs Advance. HotDocs Author is a Microsoft Windows application that comes with a Word add-in to create new templates or to use existing Word documents. HotDocs also supports plain text (.ttx) and answer intake templates (.hdint). Templates have associated configuration and component files. HotDocs Author is typically utilized by select users who are responsible for editing templates and creating document structures. See *Figure 1*.

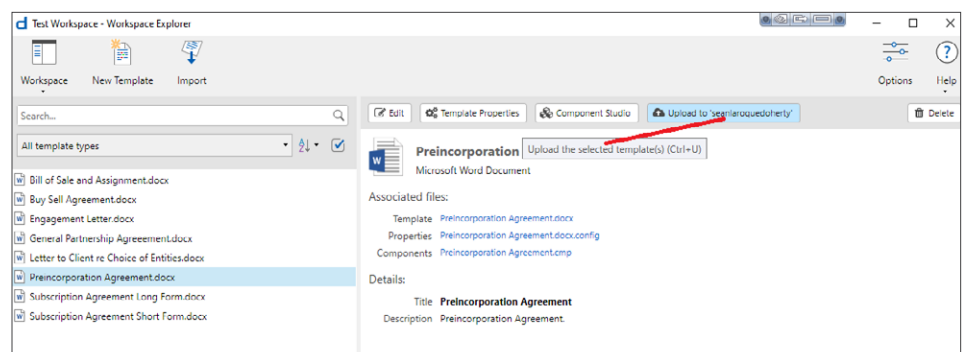


Figure 1: After installing HotDocs Author, you can launch the application to the Workplace Explorer to create new templates and transform Word documents into editable templates. Then you can upload the templates to HotDocs Advance.

“HotDocs virtual client interviews give you the capabilities to use web-based interviews to capture data.”

HotDocs Author

In HotDocs Author, you identify changeable text in existing documents such as dates, names, addresses, etc. (e.g. information that varies each time you reuse a form). Use HotDocs Author's Field Editor to create a placeholder for the identified changeable text. Placeholders link to variables inserted into the document, replacing the changeable text. Placeholders and variables trigger questions in an interview. You can use different variables depending on the question and its answers such as text, number, date, yes-no, or a drop-down to select from a predetermined list of answers.

When you set up a variable in the HotDocs Author tool, you can declare its type. Variable types include text, numbers, dates, images, and calculations. HotDocs consists of a scripting language that formats and manipulates text and performs date calculations, complex logical checks, and mathematics. A Computational Editor lets you calculate complex formulas such as commissions, salaries, and bonuses. After selecting the variable type, name the variable, edit its parameters, and choose to substitute one or all matching text items with the placeholder. To maximize efficiency and reduce risk, replace all the same text with the variable. *See Figure 2.*

The Component Studio

HotDocs presents interviews based on the variable names. Interview answers link to the placeholders and insert the variables in the document. Although some variables such as dates can be straightforward, others may need more explicit prompts to

generate correct answers. You can change the prompt with the Component Studio.

The Component Studio lets you group similar variables into dialogues or conversations to improve the user experience and make for a more engaging interview. In the Component Studio, you can create a conversation by dragging and dropping existing variables or creating new ones to present to users together in a region. *See Figure 3 on the next page.*

You can show or hide any document part or variable depending on an interview answer such as a yes/no question. You can also use other data input from a related database like a matter or customer relationship management (CRM) database. HotDocs encapsulates the dependent text in an If-Then statement with optional If-Then-Else logic to make one template applicable to many situations and users.

Testing Your Templates

After you've created placeholders and substituted variables for changeable text, you can test the form using the Test button in the HotDocs ribbon. The Test function generates a HotDocs interview in a separate window. The Test interview window displays an outline with a list of dialogues associated with one or more questions. Answer the questions presented with new information and review the document in the Preview tab. The Answer Summary tab displays the answers you typed. Close the Test interview to generate a customized Microsoft Word document.

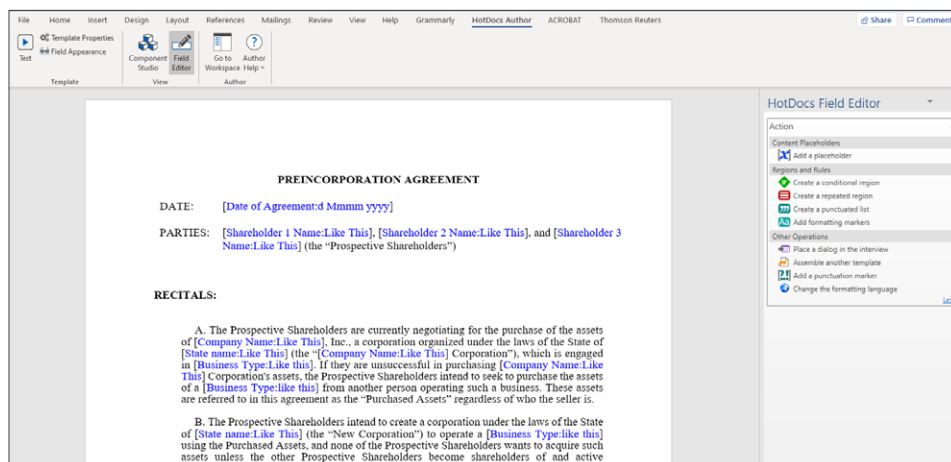


Figure 2: Use the toolset available in HotDocs Author and the Microsoft Word ribbon, including the Field Editor and the Component Studio, to create templates from scratch or transform existing Word documents.

“HotDocs Advance integrates with AbacusLaw, Amicus Attorney, and other databases to pull field data into HotDocs Author to create placeholders and variables and fill them with data.”

HotDocs Advance

When you're ready to deploy templates, upload them to HotDocs Advance, where you can create workgroups with Work Items associated with templates. You have options to upload answer files to populate templates and package templates together with common variables that use one master interview to generate multiple documents. *See Figure 4 on the next page.*

You can use HotDocs Advance to make templates available to users and you can conduct interviews that gather data. The HotDocs Advance platform assembles documents with the data from completed interviews and makes the final versions available for download. There is no need to create different versions of templates. A single template can generate several individualized documents.

Users associated with workgroups log in to HotDocs Advance using a web browser where they can select Work Items and answer the interview questions. When complete, the cloud-based assembly engine offers the document for download. The website maintains an audit log of templates for you to review, including version information. Default reports include template usage, document assembly activity, and client interviews.

HotDocs virtual client interviews give you the capabilities to use web-based

interviews to capture data. You can send users a secure link to an interview via email. The recipient clicks the link, completes the interview, and HotDocs captures the data to generate documents. Reports identify who received a client interview, whether they accessed it, and if their access was revoked. The links are active for 72 hours.

You can manage HotDocs Advance users through Microsoft Active Directory and configure website workflow options. After you upload templates, you can require approval before making them available. You can share Work Items by default or restrict them to the owner until released. You can also limit the ability to download answer files and the ability to use client interviews.

HotDocs Advance integrates with AbacusLaw, Amicus Attorney, and other databases to pull field data into HotDocs Author to create placeholders and variables and fill them with data. HotDocs can capture and transmit information to third-party databases using an API or webhooks, with notifications containing information about events in the interview process. You can import legacy versions of HotDocs templates into Author. Before version 11, RTF files must be converted to Word format. HotDocs Author integrates with Microsoft Word for document comparison and applying the Unicode Standard to create multi-lingual documents.

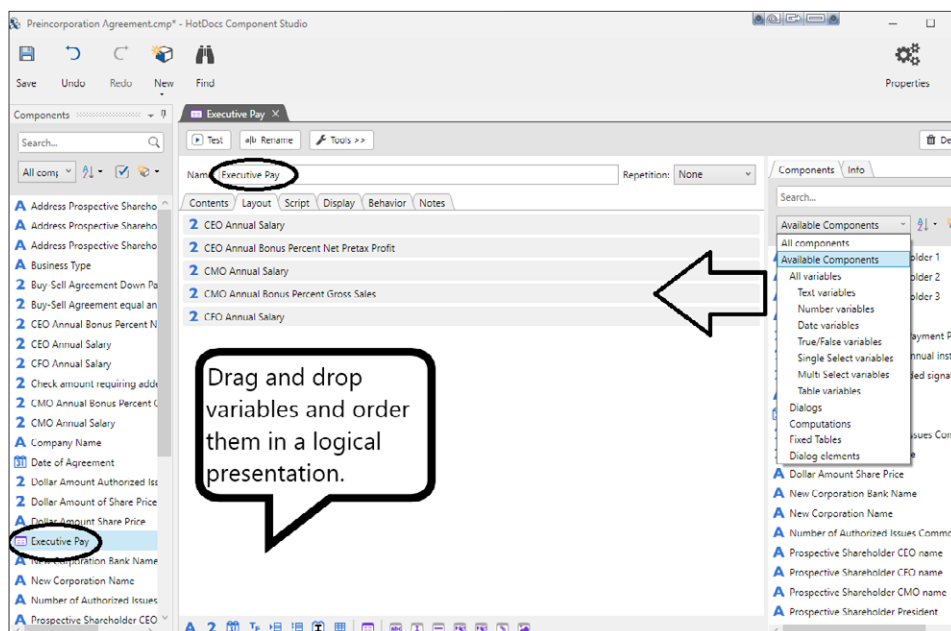


Figure 3: The Component Studio lets you create prompts for variable names and to group variables together in order to make an efficient dialog to create an engaging interview.

Pricing

AbacusNext licenses HotDocs Advance on a per-user per-month basis. User licenses grant permissions to authors, end users, and system administrators. Users can access a wide array of legal forms in the [HotDocs Market](#), a cloud-based document assembly service and an online marketplace.

Who is AbacusNext?

Founded in 1983, AbacusNext is a private California company. It is based in San Diego, California with offices in Toronto, Canada and Edinburgh, UK. In 2017, AbacusNext acquired HotDocs from Capsoft UK, which acquired it from LexisNexis in 2009. HotDocs has more than 1.5 million users in 60 countries across various industries including law, financial services, publishing, real estate, and retail. AbacusNext has 300 employees, one-half of whom work in development and engineering. Private equity from Providence Equity Partners helps to fuel the company's growth and acquisition.

Why Should You Consider HotDocs?

- HotDocs document automation minimizes compliance risk by replacing monotonous cut-and-paste operations that create new documents from old.
- Automated templates maximize quality and provide standardization in document parts such as branding, styles, headers, footers, and footnotes in addition to consistency in calculations and computations.
- Boosts efficiency by reducing the effort required to create new documents, reusing content, and customizing them to meet client requirements.
- Integrates with matter management and CRM databases to add client data into the interview process to generate customized documents.

See How HotDocs Works in Half An Hour or Less!

The best way to see the many benefits of HotDocs document automation software is to [schedule a live demo](#) with one of our product specialists.

The screenshot displays the HotDocs Advance web application interface. On the left is a blue sidebar with the 'HOTdocs' logo and a navigation menu under 'YOUR WORK GROUPS' including 'Example work group', 'ADMINISTRATION', 'Manage work groups', 'Manage quick groups', 'Manage templates', 'Manage users', 'Manage user groups', 'Site settings', and 'Reports'. The main content area is titled 'Example work group' and shows a table of 'Work Items' with columns 'Name' and 'Template'. The table lists three items: 'Preincorporation Agreement' (Preincorporation.), 'Employment Agreement' (Example employi...), and 'Buy Sell Agreement' (Buy Sell Agree...). A 'Create new work item' button is in the top right. A modal window titled 'Create new work item' is open, showing a 'Name' field, a 'Template' dropdown menu (with options like 'Bill of Sale and Assignment', 'Buy Sell Agreement', 'Example employment agreement', and 'Preincorporation Agreement'), and an 'Upload initial answer file' section with a file selection button. At the bottom of the modal are 'Launch', 'Save', and 'Cancel' buttons. A red arrow points to the 'Create new work item' button.

Figure 4: HotDocs Advance is a web-based application that makes templates available for users to complete an interview and generate a document for download.

Thank you for reading, let's keep in touch!

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