Getting Started

First time login, User Experience and using the Examples to create your first Application

June 2022

Available from your browser or MS Teams

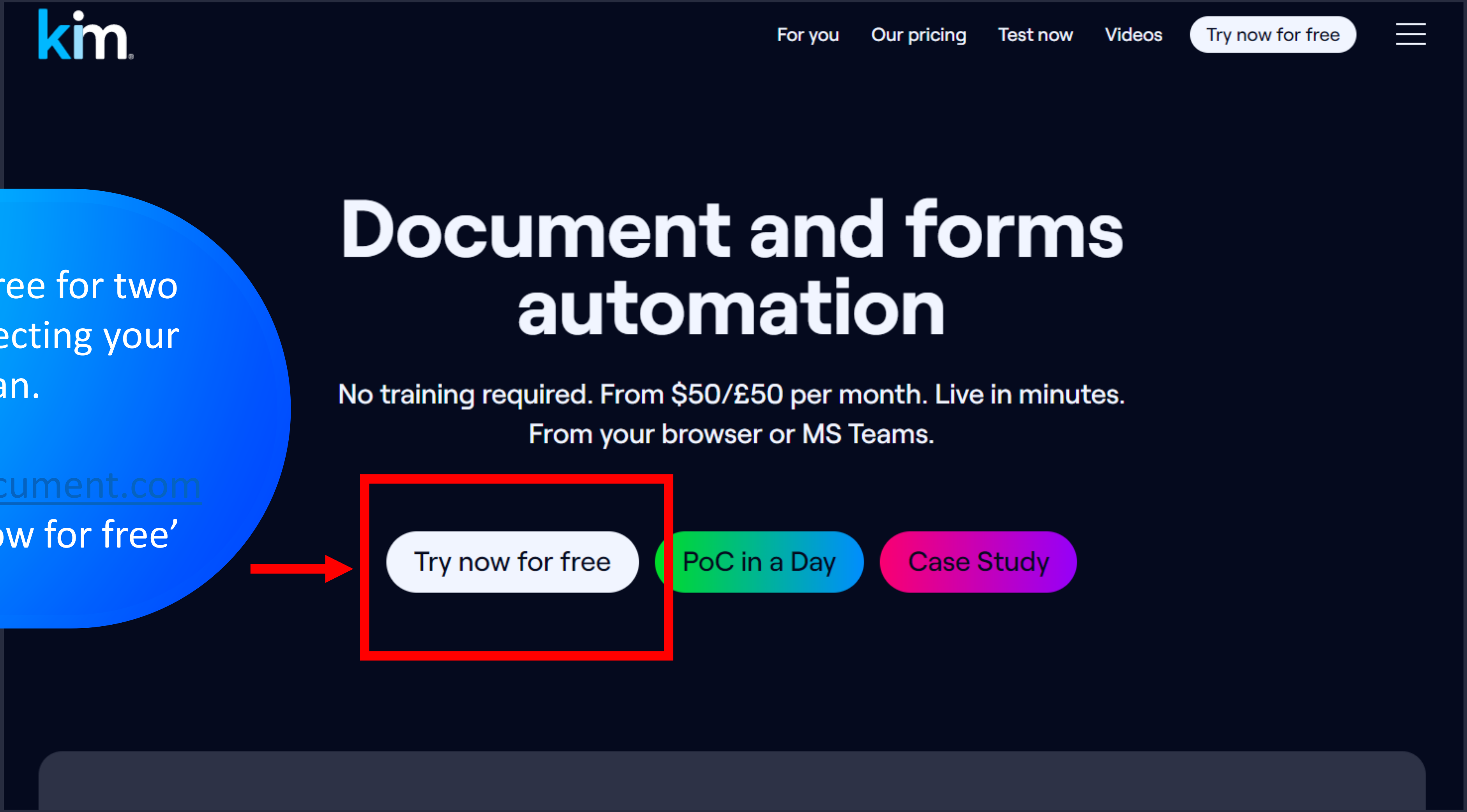
Using this guide

If you have already registered for Kim please skip to slide 10 (slides 3-9 cover the initial registration process)

www.kimdocument.com

You can try Kim free for two weeks before selecting your billing plan.

Go to www.kimdocument.com and select ‘Try now for free’



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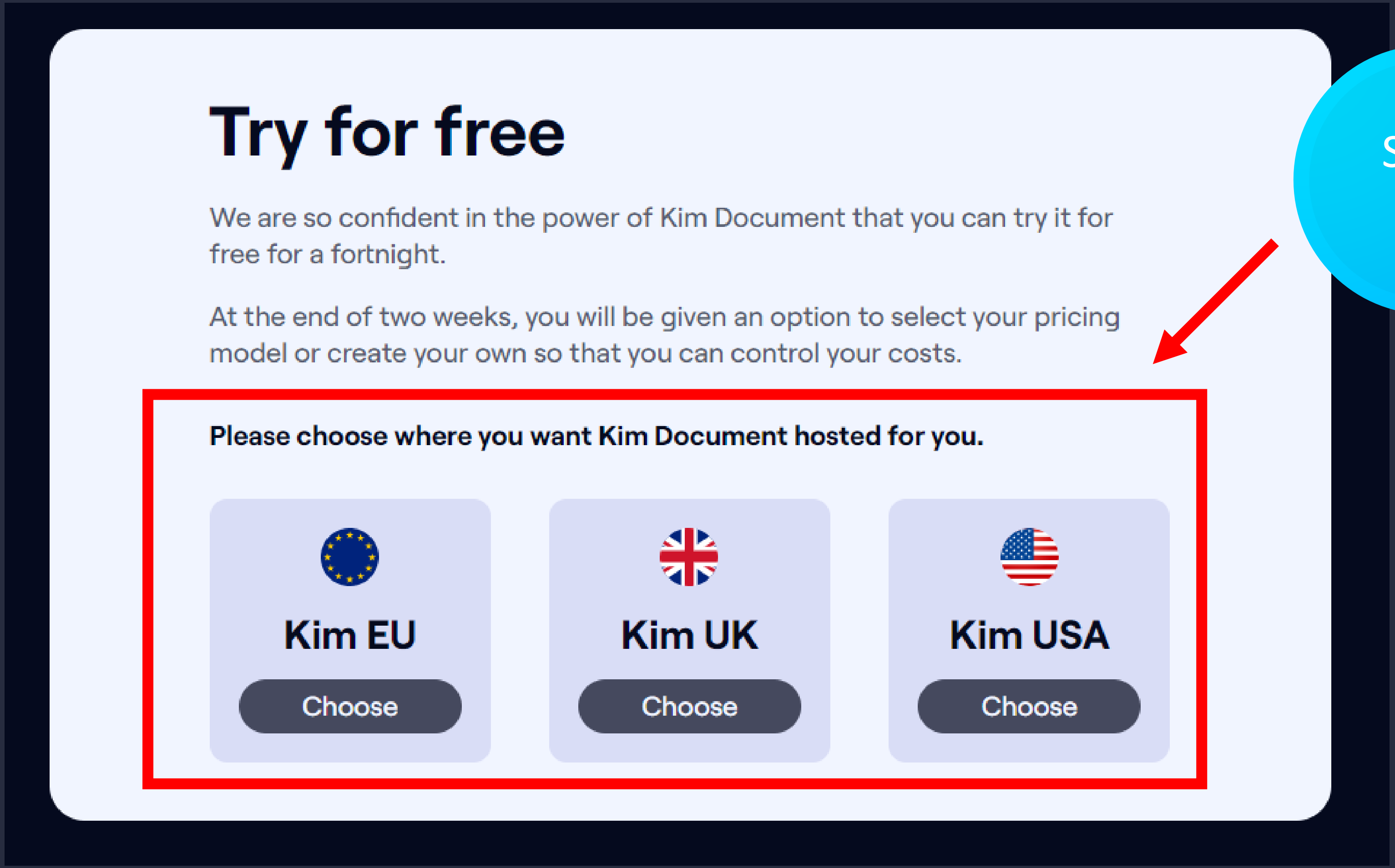
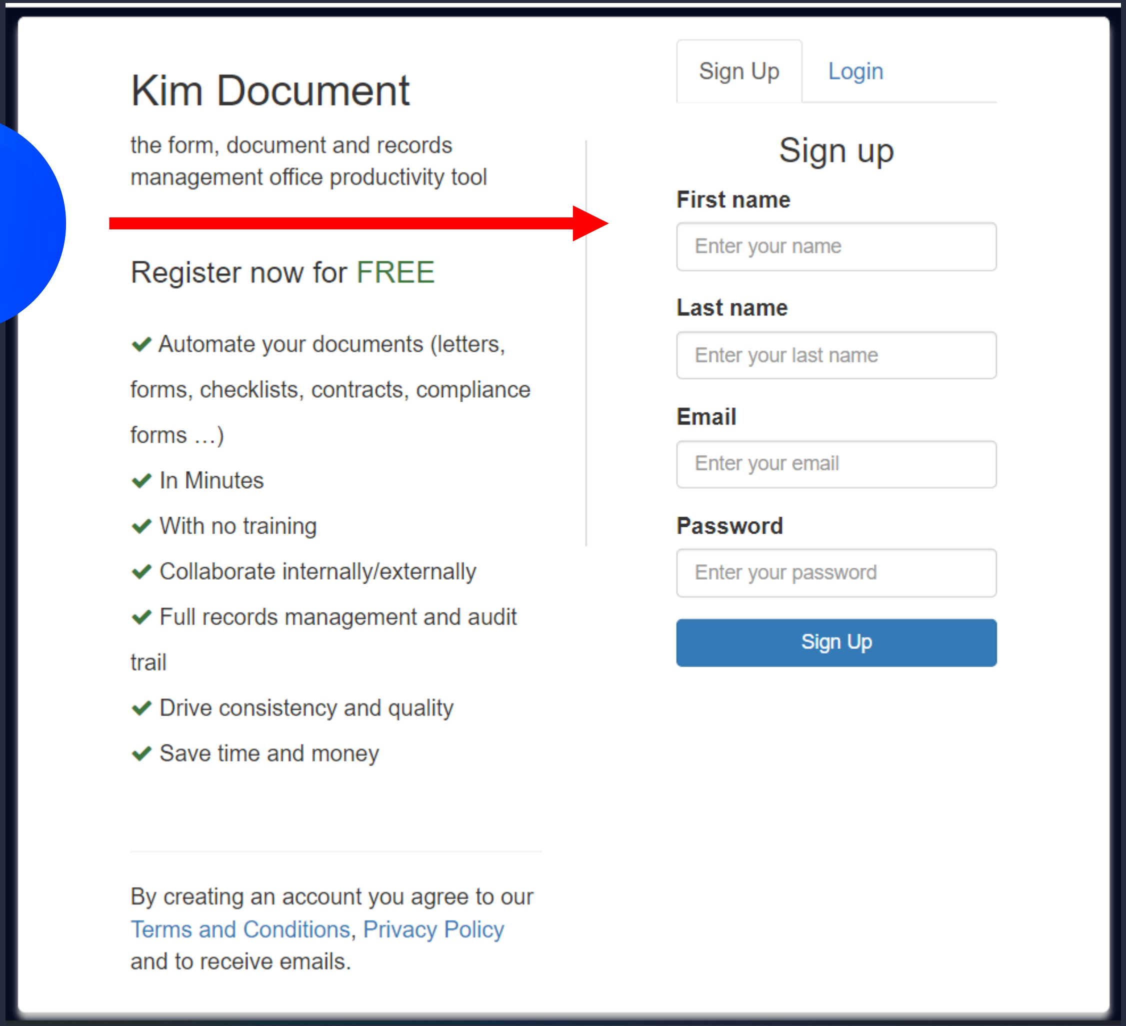


Select where you want your Kim Document instance hosted

www.kimdocument.com

Enter your details via Sign Up or …



Sign Up Login

Kim Document

the form, document and records management office productivity tool

Register now for FREE

- ✔ Automate your documents (letters, forms, checklists, contracts, compliance forms …)
- ✔ In Minutes
- ✔ With no training
- ✔ Collaborate internally/externally
- ✔ Full records management and audit trail
- ✔ Drive consistency and quality
- ✔ Save time and money

By creating an account you agree to our Terms and Conditions, Privacy Policy and to receive emails.

Sign up

First name

Enter your name

Last name

Enter your last name

Email

Enter your email

Password

Enter your password

Sign Up

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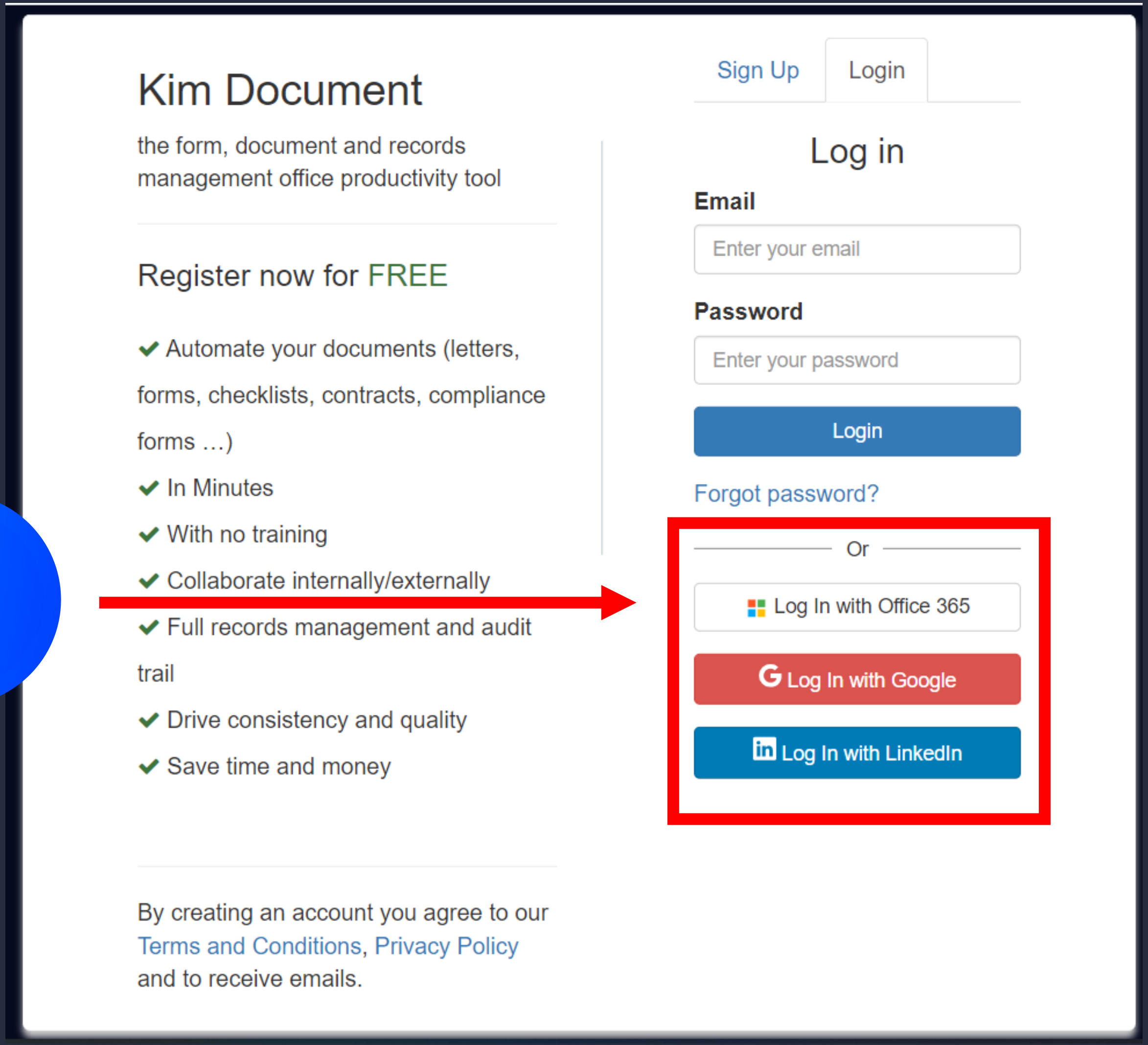
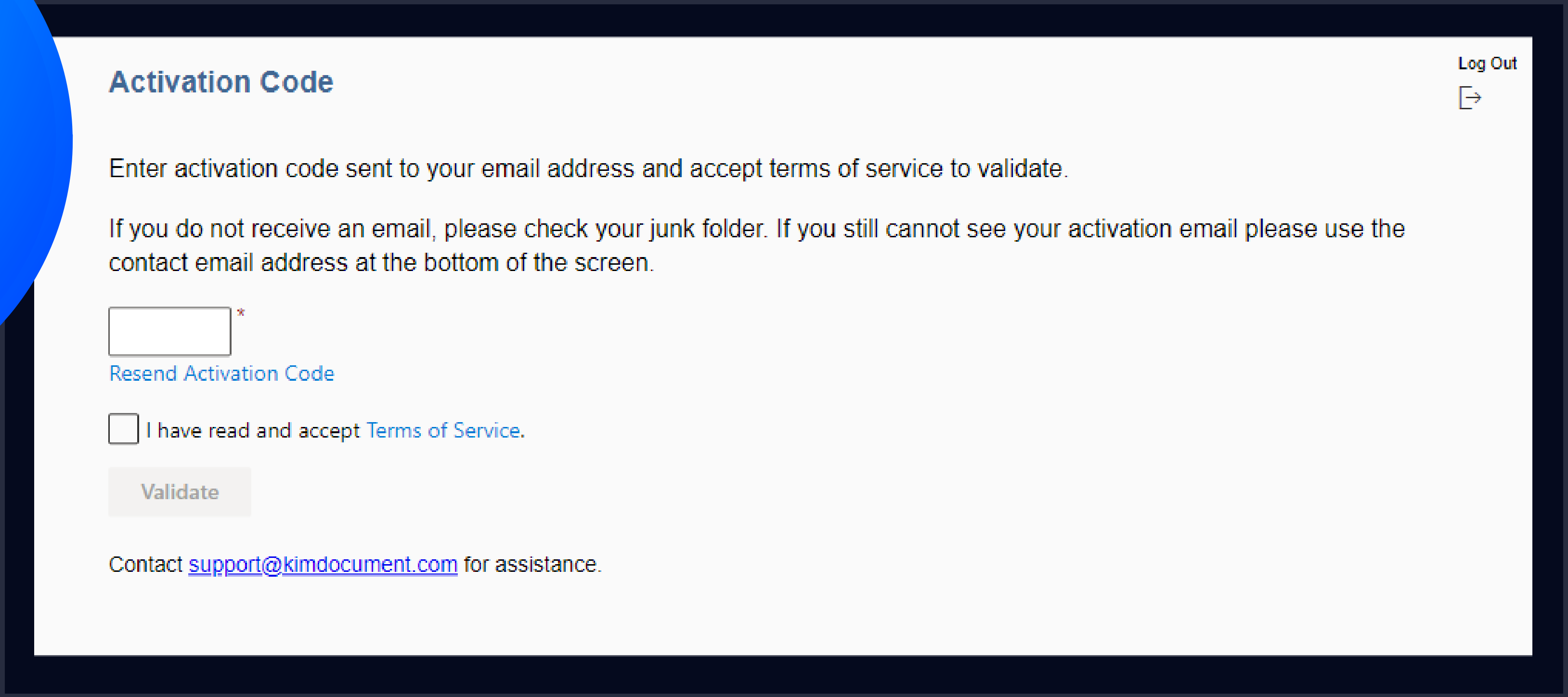


… use Login to access via O365, Google or LinkedIn

www.kimdocument.com

After you Sign Up or Login you will be presented with the following screen and an email will be sent to you with your Activation Code



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Copy the Activation Code and enter it into the field in the previous screen

Kim Document Activation

From: "Kim Document" <admin@kimtechnologies.com>
Date: 2022-06-03 11:42:24

PLAIN HTML SOURCE

Hi Karl,

Please copy the activation code below and paste it into the Kim Documents Registration Wizard to activate your account. Please note there is no charge to register.

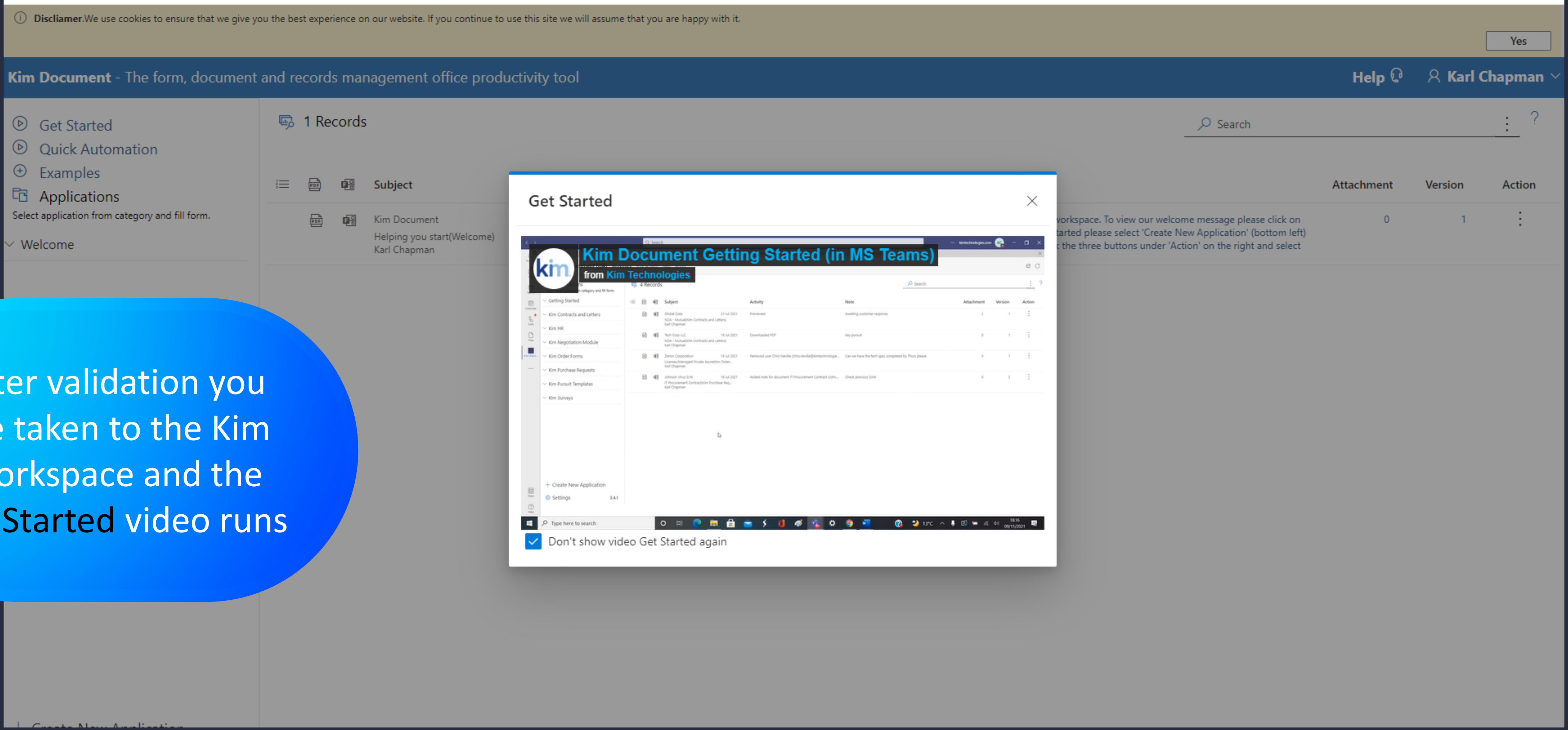
Activation code : Code Hidden

We hope you enjoy using Kim Document.

The Kim Document Team

Find out how you can use Kim Document by automating your frequently used documents to make your business more efficient by visiting https://www.kimdocument.com

Getting started - Video



After validation you are taken to the Kim Workspace and the Get Started video runs

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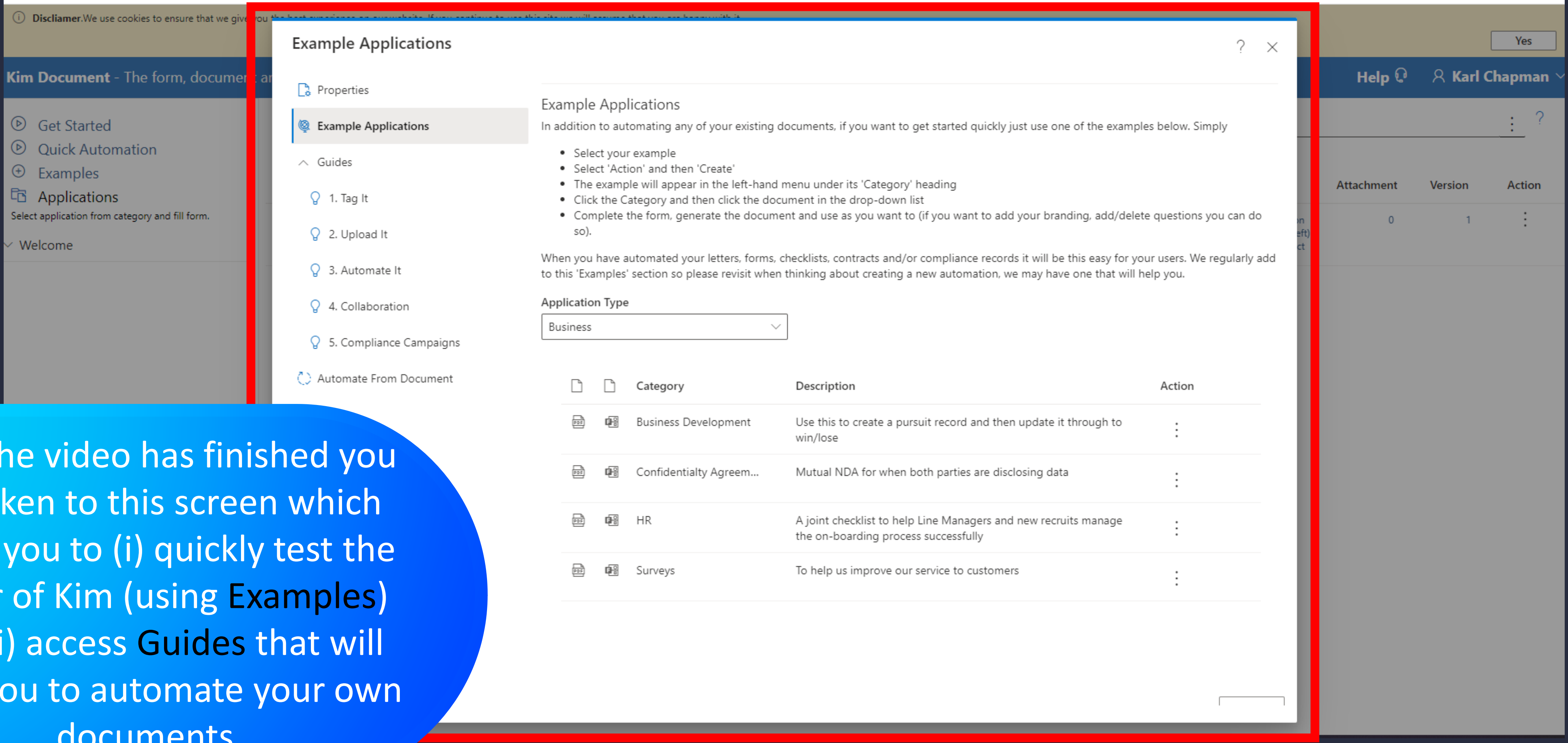
Getting started - Examples



After the video has finished you are taken to this screen which allows you to (i) quickly test the power of Kim (using **Examples**) and (ii) access **Guides** that will allow you to automate your own documents

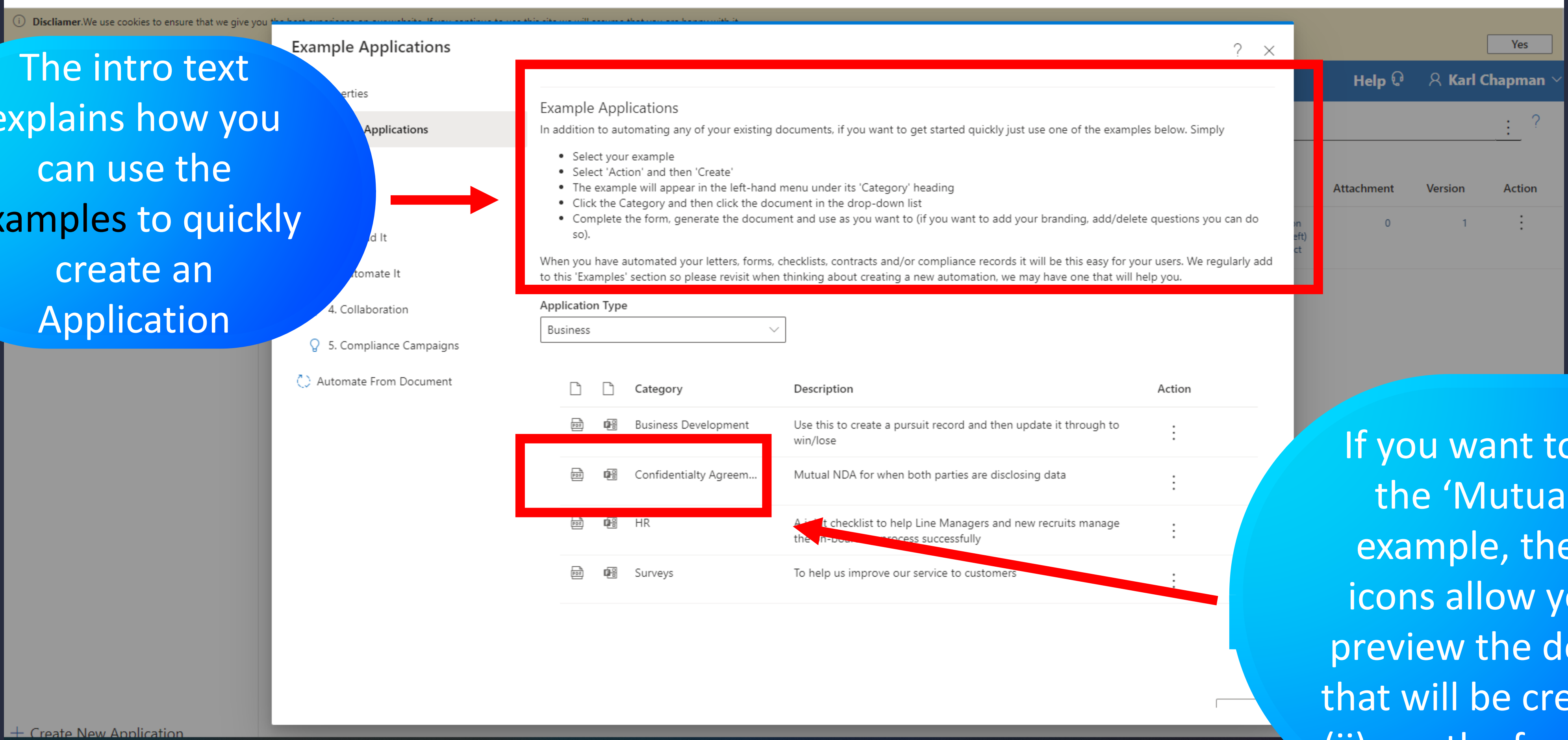
Getting started - Examples

From the Examples menu we will now use the 'NDA Mutual' to show:

- how quickly you can take an automation live; and
- show some of the core elements of Kim

Getting started - Examples

The intro text explains how you can use the Examples to quickly create an Application



If you want to review the 'Mutual NDA' example, these two icons allow you to (i) preview the document that will be created and (ii) see the form Wizard

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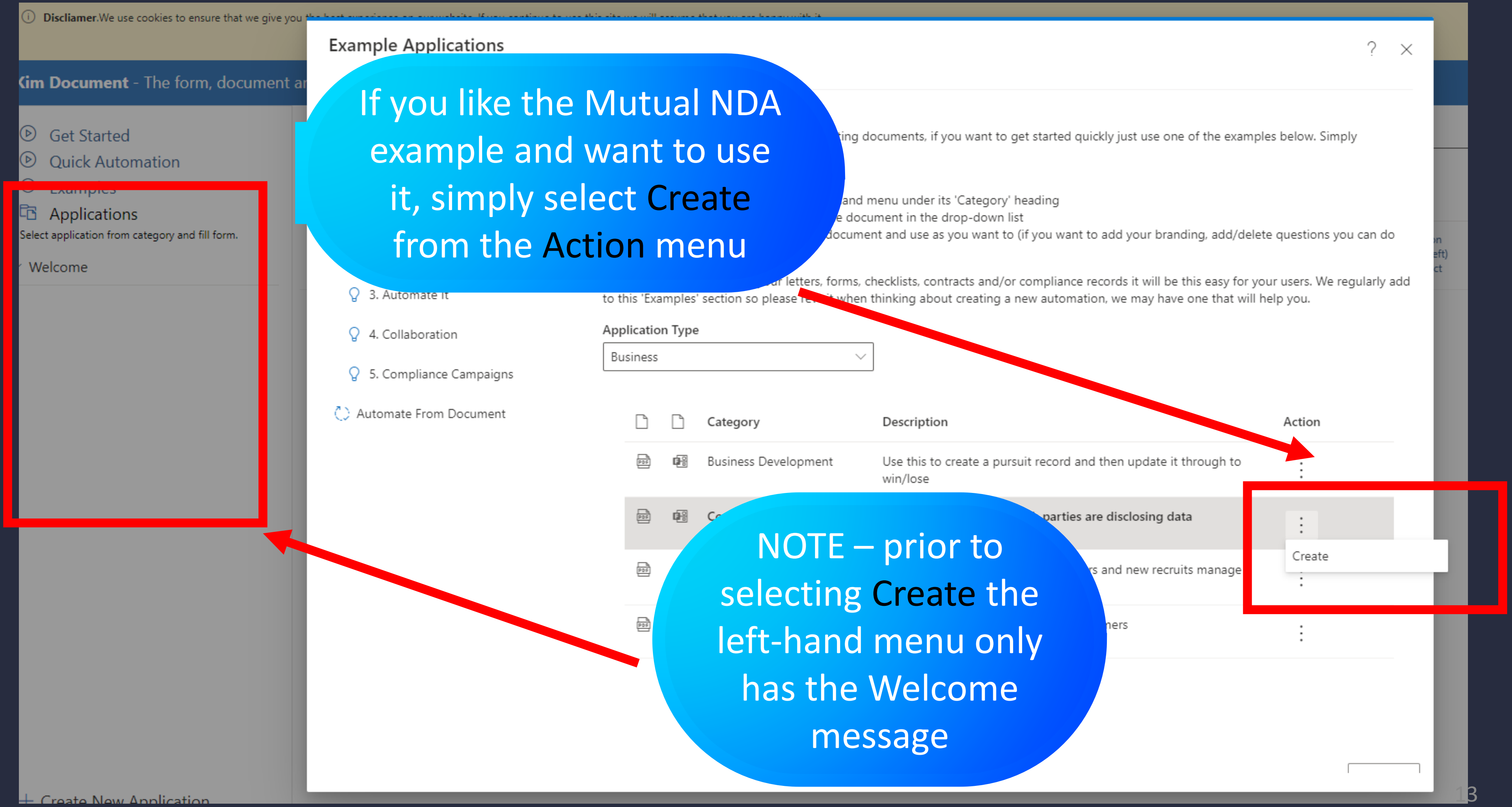
Getting started - Examples

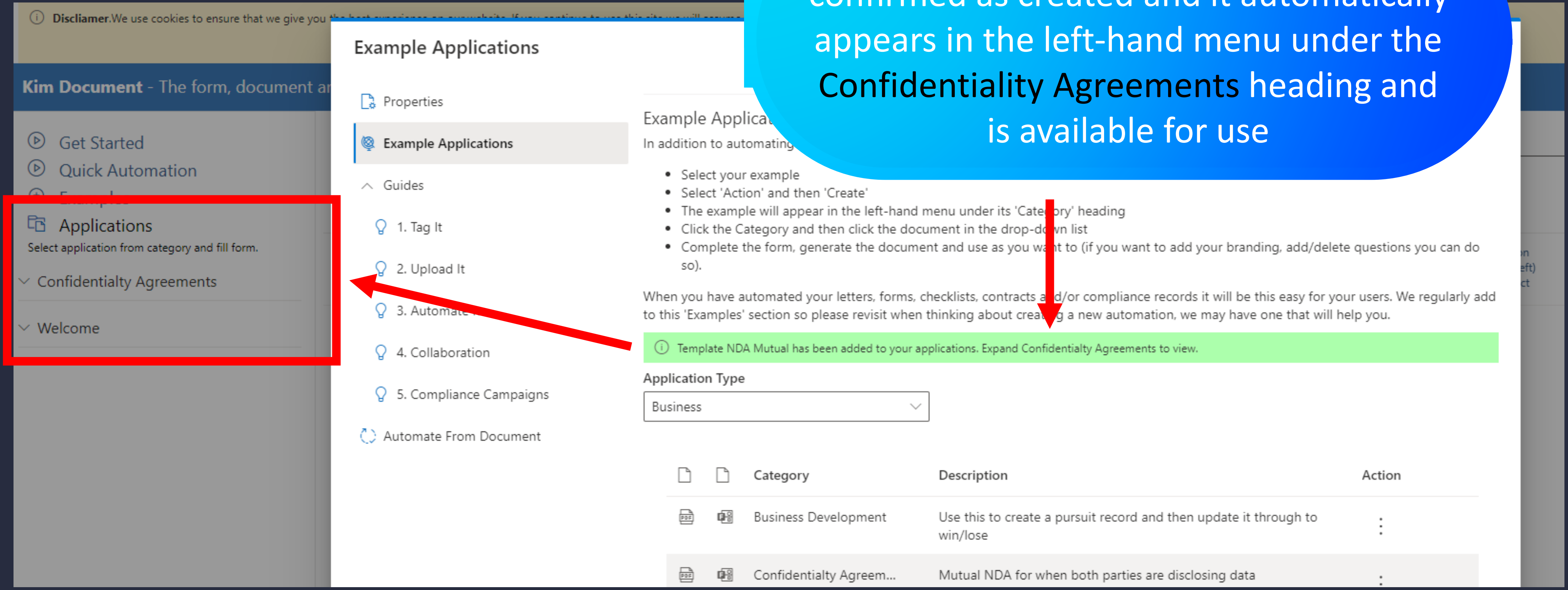


If you like the Mutual NDA example and want to use it, simply select Create from the Action menu

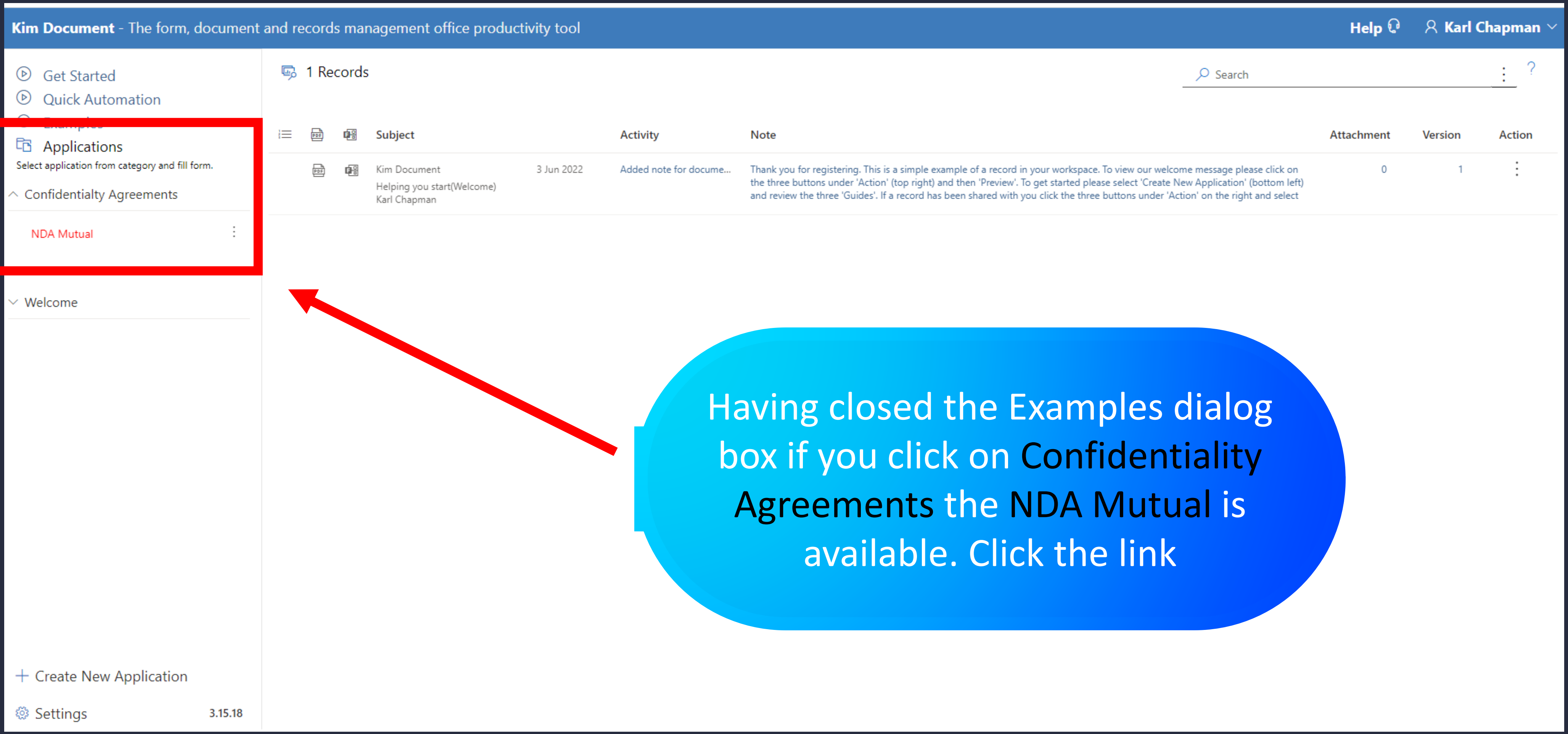
NOTE – prior to selecting Create the left-hand menu only has the Welcome message

Getting started - Examples

Having selected Create the Mutual NDA is confirmed as created and it automatically appears in the left-hand menu under the Confidentiality Agreements heading and is available for use

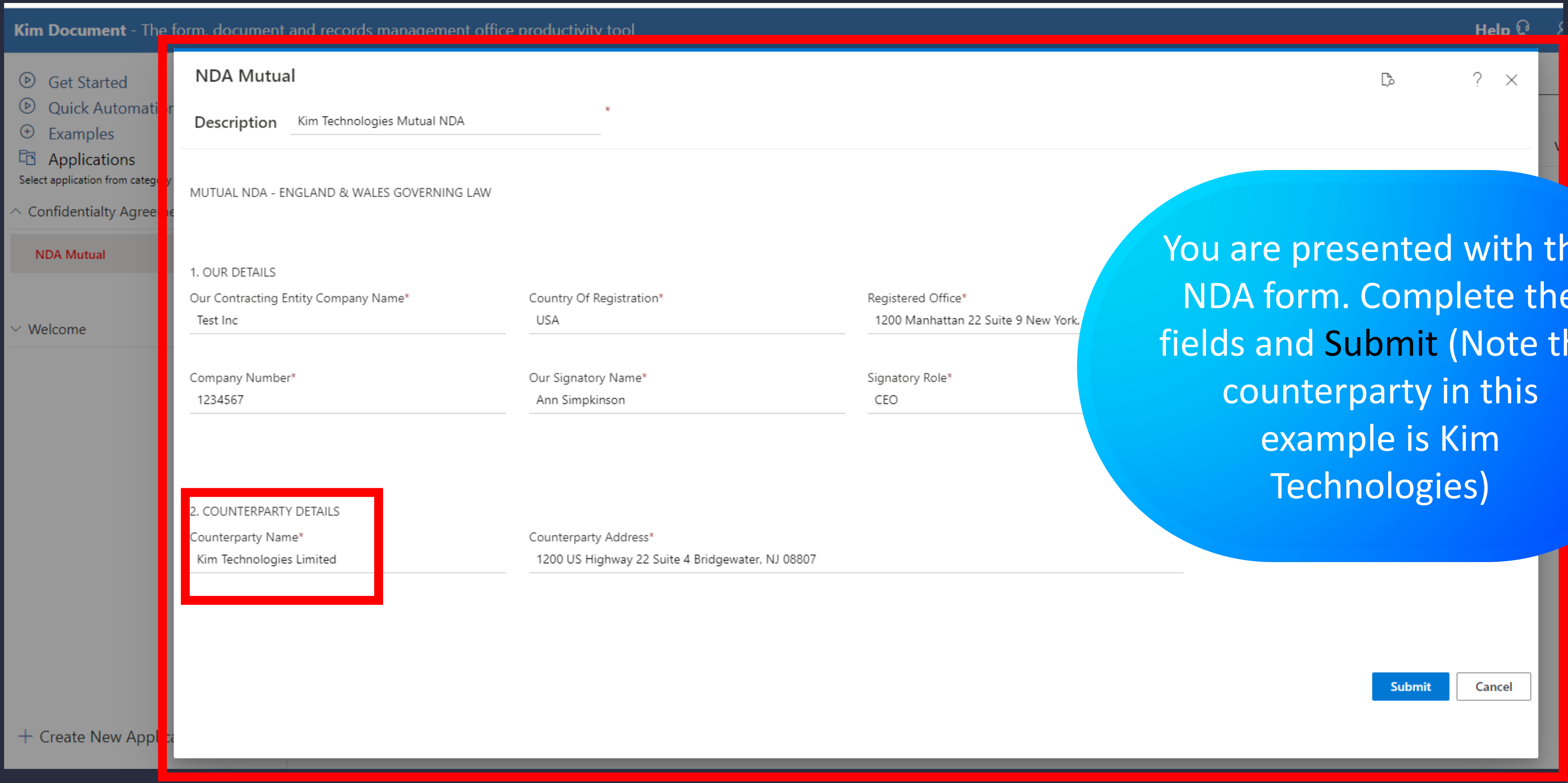


Getting started - Examples



Having closed the Examples dialog box if you click on Confidentiality Agreements the NDA Mutual is available. Click the link

Getting started - Examples



You are presented with the NDA form. Complete the fields and Submit (Note the counterparty in this example is Kim Technologies)

Getting started - Examples

Confidentiality Agreement Mutual

This Agreement is made on the date of last signature of this Agreement between:

1. Test Inc i corporated and registered in USA with company numbe 1234567 hose registered office is a 1200 Manhattan 22 Suite 9 New York, NY
2. Kim Technologies Limited whose registered office is at 1200 US Highway 22 Suite 4 Bridgewater, NJ 08807

(each a "**Party**" and together, the "**Parties**").

BACKGROUND

Each Party wishes to disclose Confidential Information to the other Party in connection with the Purpose. Each Party wants to ensure that the other Party maintains the confidentiality of the Confidential Information. In consideration of the benefits to the Parties of disclosing and receiving the Confidential Information, the Parties have agreed to comply with the following terms in connection with the use and disclosure of Confidential Information.

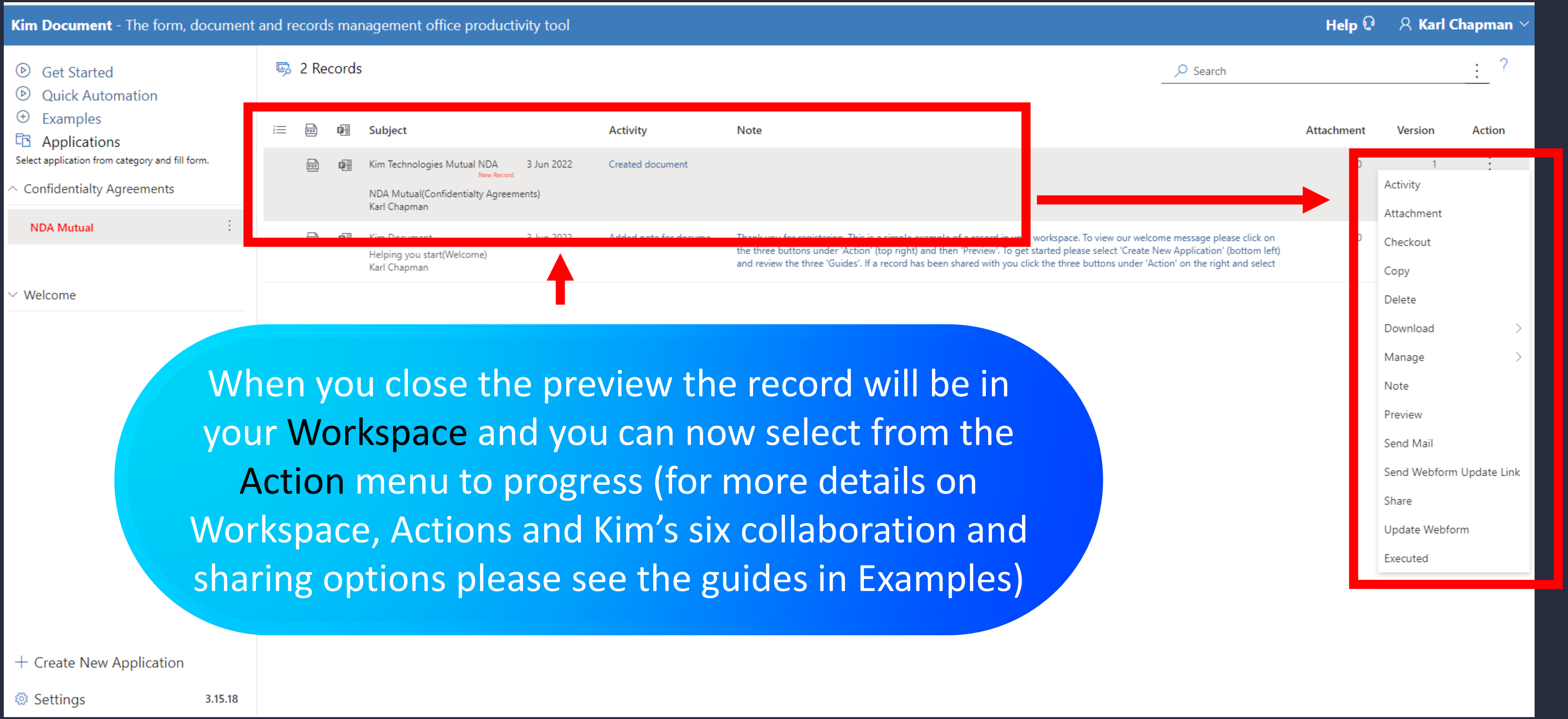
a) is or becomes generally available to the public (other than as a result of its disclosure by the Recipient or its Representatives in breach of this Agreement);

b) was available to the Recipient on a non-confidential basis prior to disclosure by the Disclosing Party;

c) was, is or becomes available to the Recipient on a non-confidential basis from a person who, to the Recipient's knowledge, is not bound by a

You will be presented with a preview of the NDA you have generated incorporating the data you entered in the form on the previous screen (e.g. Kim Technologies as the counterparty)

Getting started - Examples



When you close the preview the record will be in your Workspace and you can now select from the Action menu to progress (for more details on Workspace, Actions and Kim's six collaboration and sharing options please see the guides in Examples)

Getting started – Using your documents

Automating your own letters, forms, records, checklists, compliance records, contracts … rather than just using an Example

Getting started – Using your documents

1. Tag it
2. Upload it
3. Automate it

Activate it

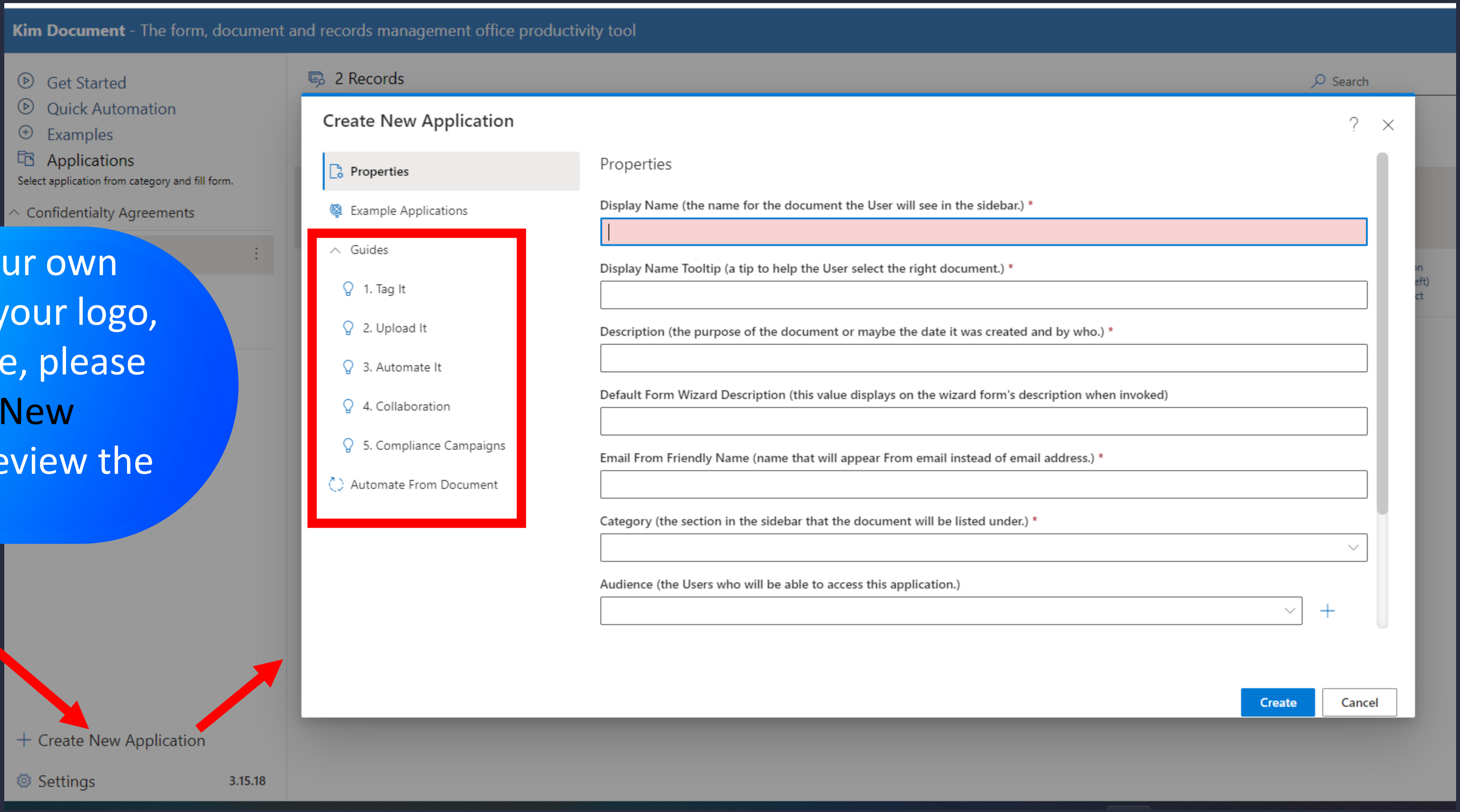
Share it

Analyze it

There are three steps to automating your documents. Take your Word document and …

Getting started – Using your documents

To automate your own documents, with your logo, in your style guide, please open Create New Application and review the Guides



Getting started – Using your documents

kim

1. Tag It - How to Tag a Document Ahead of Uploading and Automating it in Kim

If you are not familiar with the term 'tag', the
something that is going to be automated. Fo
in a word document, that's just a word. But i
square brackets (i.e. [$Date]), then Kim recog
word into an active element (or field if you w
sees this in a document, it translates it into c
the necessary information, generate the doc

1 Open your Word document (letter, record, ch
TIP 1: Before starting to tag make sure that t
with your branding and style guide. The docu
will generate and use internally and/or with
stakeholders.

2. Upload it - How to Upload a Document, Create an Application Category (Menu Item) and Create an 'Audience' (Who Has the Rights to Use a Document).

Having tagged your document (see 1. Tag It - How Tag A Document', this step-by-step shows you how to upload a document to Kim. It shows you how to create the 'Applications' (menu) that Users can select from. It also shows you how to create an 'Audience' (the people who have the rights to use the document').

1 When you initially access Kim to upload your first document you will see the following screen with (i) no 'Applications' in the left-hand menu and (ii) no

3. Automate It - How to Automate a Document

Having tagged and uploaded your document to Kim, this step-by-step will show you how easy it is to automate your document and enable the settings that allow
collaborate with colleagues or third parties.

ıded the document you want to automate. Select the
ınder (here it is 'UK Sales Team').

0 Records

Subject

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kim®