



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)

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

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

The screenshot shows the kim website homepage. At the top left is the 'kim.' logo. To its right are navigation links: 'For you', 'Our pricing', 'Test now', 'Videos', and a 'Try now for free' button. A hamburger menu icon is on the far right. The main heading is 'Document and forms automation'. Below it is the text 'No training required. From \$50/£50 per month. Live in minutes. From your browser or MS Teams.' At the bottom of the main content area are three buttons: 'Try now for free' (white), 'PoC in a Day' (green), and 'Case Study' (purple). A red box highlights the 'Try now for free' button, and a red arrow points from the blue callout box to it.

Try for free

We are so confident in the power of Kim Document that you can try it for free for a fortnight.

At the end of two weeks, you will be given an option to select your pricing model or create your own so that you can control your costs.

Please choose where you want Kim Document hosted for you.



Kim EU
Choose



Kim UK
Choose



Kim USA
Choose

Select where you want your Kim Document instance hosted

Enter your details via
Sign Up or ...

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 Login

Sign up

First name
Enter your name

Last name
Enter your last name

Email
Enter your email

Password
Enter your password

Sign Up

... use Login to access via O365, Google or LinkedIn

Kim Document
the form, document and records management office productivity tool

[Sign Up](#) [Login](#)

Log in

Email
Enter your email

Password
Enter your password

[Login](#)

[Forgot password?](#)

Or

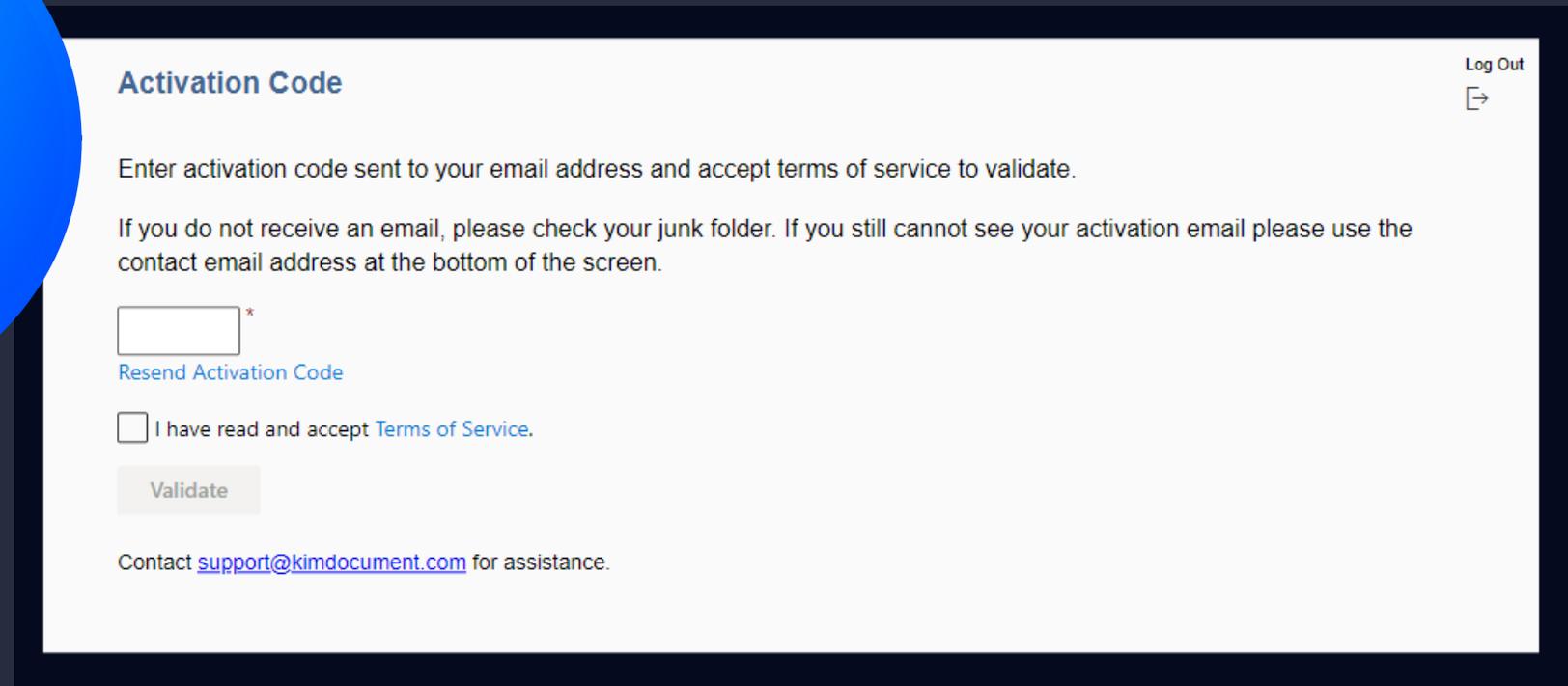
- Log In with Office 365
- Log In with Google
- Log In with LinkedIn

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.

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



The screenshot shows a web page titled "Activation Code" with a "Log Out" link in the top right corner. The main content area contains the following text: "Enter activation code sent to your email address and accept terms of service to validate." followed by "If you do not receive an email, please check your junk folder. If you still cannot see your activation email please use the contact email address at the bottom of the screen." Below this is a text input field with an asterisk, a "Resend Activation Code" link, a checkbox labeled "I have read and accept Terms of Service.", and a "Validate" button. At the bottom, it says "Contact support@kimdocument.com for assistance."

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 - Examples

Example Applications

In addition to automating any of your existing documents, if you want to get started quickly just use one of the examples below. Simply

- Select your example
- Select 'Action' and then 'Create'
- The example will appear in the left-hand menu under its 'Category' heading
- Click the Category and then click the document in the drop-down list
- Complete the form, generate the document and use as you want to (if you want to add your branding, add/delete questions you can do so).

When you have automated your letters, forms, checklists, contracts and/or compliance records it will be this easy for your users. We regularly add to this 'Examples' section so please revisit when thinking about creating a new automation, we may have one that will help you.

Application Type
Business

Category	Description	Action
Business Development	Use this to create a pursuit record and then update it through to win/lose	⋮
Confidentiality Agreements	Mutual NDA for when both parties are disclosing data	⋮
HR	A joint checklist to help Line Managers and new recruits manage the on-boarding process successfully	⋮
Surveys	To help us improve our service to customers	⋮

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

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



Example Applications

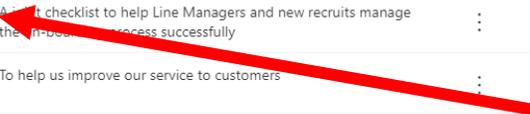
In addition to automating any of your existing documents, if you want to get started quickly just use one of the examples below. Simply

- Select your example
- Select 'Action' and then 'Create'
- The example will appear in the left-hand menu under its 'Category' heading
- Click the Category and then click the document in the drop-down list
- Complete the form, generate the document and use as you want to (if you want to add your branding, add/delete questions you can do so).

When you have automated your letters, forms, checklists, contracts and/or compliance records it will be this easy for your users. We regularly add to this 'Examples' section so please revisit when thinking about creating a new automation, we may have one that will help you.

Application Type
Business

Category	Description	Action
Business Development	Use this to create a pursuit record and then update it through to win/lose	⋮
Confidentiality Agreements	Mutual NDA for when both parties are disclosing data	⋮
HR	HR checklist to help Line Managers and new recruits manage the on-boarding process successfully	⋮
Surveys	To help us improve our service to customers	⋮



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

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**

Category	Description	Action
Business Development	Use this to create a pursuit record and then update it through to win/lose	⋮ Create
Compliance	Use this to create a compliance record and then update it through to win/lose	⋮ Create
Contract Management	Use this to create a contract record and then update it through to win/lose	⋮ Create
Dispute Resolution	Use this to create a dispute record and then update it through to win/lose	⋮ Create
Employment	Use this to create an employment record and then update it through to win/lose	⋮ Create
Finance	Use this to create a finance record and then update it through to win/lose	⋮ Create
Human Resources	Use this to create a human resources record and then update it through to win/lose	⋮ Create
Insurance	Use this to create an insurance record and then update it through to win/lose	⋮ Create
Intellectual Property	Use this to create an intellectual property record and then update it through to win/lose	⋮ Create
Legal	Use this to create a legal record and then update it through to win/lose	⋮ Create
Marketing	Use this to create a marketing record and then update it through to win/lose	⋮ Create
Operations	Use this to create an operations record and then update it through to win/lose	⋮ Create
Real Estate	Use this to create a real estate record and then update it through to win/lose	⋮ Create
Technology	Use this to create a technology record and then update it through to win/lose	⋮ Create
Transportation	Use this to create a transportation record and then update it through to win/lose	⋮ Create
Utilities	Use this to create a utilities record and then update it through to win/lose	⋮ Create
Manufacturing	Use this to create a manufacturing record and then update it through to win/lose	⋮ Create
Healthcare	Use this to create a healthcare record and then update it through to win/lose	⋮ Create
Education	Use this to create an education record and then update it through to win/lose	⋮ Create
Government	Use this to create a government record and then update it through to win/lose	⋮ Create
Non-Profit	Use this to create a non-profit record and then update it through to win/lose	⋮ Create
Other	Use this to create an other record and then update it through to win/lose	⋮ Create

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

Example Applications

Properties

Example Applications

Guides

- 1. Tag It
- 2. Upload It
- 3. Automate
- 4. Collaboration
- 5. Compliance Campaigns

Automate From Document

Example Applications

In addition to automating...

- Select your example
- Select 'Action' and then 'Create'
- The example will appear in the left-hand menu under its 'Category' heading
- Click the Category and then click the document in the drop-down list
- Complete the form, generate the document and use as you want to (if you want to add your branding, add/delete questions you can do so).

When you have automated your letters, forms, checklists, contracts and/or compliance records it will be this easy for your users. We regularly add to this 'Examples' section so please revisit when thinking about creating a new automation, we may have one that will help you.

Template NDA Mutual has been added to your applications. Expand Confidentiality Agreements to view.

Application Type

Business

Category	Description	Action
Business Development	Use this to create a pursuit record and then update it through to win/lose	⋮
Confidentiality Agreements	Mutual NDA for when both parties are disclosing data	⋮

Getting started - Examples

The screenshot shows the Kim Document application interface. The top navigation bar includes 'Kim Document - The form, document and records management office productivity tool', 'Help', and the user 'Karl Chapman'. The left sidebar contains navigation items: 'Get Started', 'Quick Automation', 'Examples', 'Applications', 'Confidentiality Agreements', and 'Welcome'. The 'Applications' item is highlighted with a red box. Below it, under 'Confidentiality Agreements', the 'NDA Mutual' link is visible. The main content area shows '1 Records' with a search bar and a table of records. The table has columns for Subject, Activity, Note, Attachment, Version, and Action. A single record is listed with the subject 'Kim Document' and a note explaining the record's purpose. A red arrow points from a blue callout box to the 'NDA Mutual' link.

Subject	Activity	Note	Attachment	Version	Action
Kim Document Helping you start(Welcome) Karl Chapman	3 Jun 2022	Added note for docume...	Thank you for registering. This is a simple example of a record in your workspace. To view our welcome message please click on the three buttons under 'Action' (top right) and then 'Preview'. To get started please select 'Create New Application' (bottom left) and review the three 'Guides'. If a record has been shared with you click the three buttons under 'Action' on the right and select	0	1

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

Getting started - Examples

Kim Document - The form, document and records management office productivity tool

Get Started
Quick Automation
Examples
Applications
Confidentialty Agreements
NDA Mutual
Welcome

NDA Mutual

Description Kim Technologies Mutual NDA

MUTUAL NDA - ENGLAND & WALES GOVERNING LAW

1. OUR DETAILS

Our Contracting Entity Company Name*	Country Of Registration*	Registered Office*
Test Inc	USA	1200 Manhattan 22 Suite 9 New York,
Company Number*	Our Signatory Name*	Signatory Role*
1234567	Ann Simpkinson	CEO

2. COUNTERPARTY DETAILS

Counterparty Name*	Counterparty Address*
Kim Technologies Limited	1200 US Highway 22 Suite 4 Bridgewater, NJ 08807

Submit Cancel

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

Getting started - Examples

Kim Document - The form, document and records management office productivity tool

- Get Started
- Quick Automate
- Examples
- Applications
- Confidentiality Agreements
- NDA Mutual
- Welcome

Document Preview

252%

Confidentiality Agreement Mutual

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

1. Test Inc i incorporated and registered in USA with company number 1234567 whose 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)

+ Create New Ap

Getting started - Examples

The screenshot shows the Kim Document interface. At the top, it says "Kim Document - The form, document and records management office productivity tool" and "Help Karl Chapman". On the left, there is a navigation menu with "Get Started", "Quick Automation", "Examples", and "Applications". Below "Applications", there are sections for "Confidentialty Agreements" and "NDA Mutual". The main area shows a table with 2 records. The first record is highlighted with a red box and has a red arrow pointing to an "Action" menu on the right. The "Action" menu is also highlighted with a red box and contains the following options: Activity, Attachment, Checkout, Copy, Delete, Download, Manage, Note, Preview, Send Mail, Send Webform Update Link, Share, Update Webform, and Executed. A blue callout bubble is overlaid on the screenshot, containing the text: "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)".

Subject	Activity	Note	Attachment	Version	Action
Kim Technologies Mutual NDA NDA Mutual(Confidentialty Agreements) Karl Chapman	3 Jun 2022 Created document			1	
Kim Document Helping you start(Welcome) Karl Chapman	3 Jun 2022 Added note for document	Thank you for registering. This is a simple example of a record in the workspace. To view our welcome message please click on the three buttons under 'Action' (top right) and then 'Preview'. To get started please select 'Create New Application' (bottom left) and review the three 'Guides'. If a record has been shared with you click the three buttons under 'Action' on the right and select			

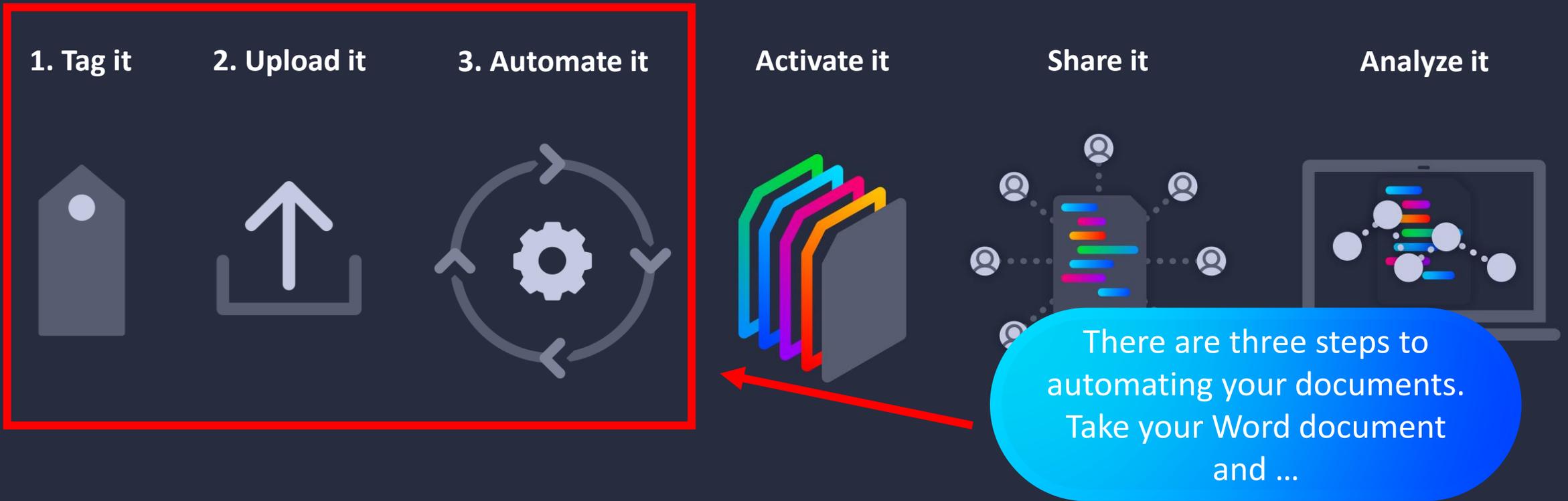
When you close the preview the record will be in your **Workspace** and you can now select from the **Action** menu to progress (for more details on **Workspace**, **Actions** and Kim's six collaboration and sharing options please see the guides in Examples)

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



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

The screenshot shows the Kim Document application interface. The main window is titled "Kim Document - The form, document and records management office productivity tool". The sidebar on the left contains navigation options: "Get Started", "Quick Automation", "Examples", "Applications", and "Confidentialty Agreements". The "Applications" section is expanded, showing "Create New Application" and "Settings". The "Create New Application" dialog box is open, displaying the "Properties" tab. The "Guides" section is highlighted with a red box, containing a list of guides: "1. Tag It", "2. Upload It", "3. Automate It", "4. Collaboration", "5. Compliance Campaigns", and "Automate From Document". The "Properties" tab on the right contains several input fields: "Display Name (the name for the document the User will see in the sidebar.) *", "Display Name Tooltip (a tip to help the User select the right document.) *", "Description (the purpose of the document or maybe the date it was created and by who.) *", "Default Form Wizard Description (this value displays on the wizard form's description when invoked)", "Email From Friendly Name (name that will appear From email instead of email address.) *", "Category (the section in the sidebar that the document will be listed under.) *", and "Audience (the Users who will be able to access this application.)". The "Create" and "Cancel" buttons are at the bottom right of the dialog box.

Getting started – Using your documents



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', think of it as something that is going to be automated. For example, in a word document, that's just a word. But if you use square brackets (i.e. [Date]), then Kim recognizes the word into an active element (or field if you will). When it sees this in a document, it translates it into a field and the necessary information, generate the document.

1

Open your Word document (letter, record, etc).
TIP 1: Before starting to tag make sure that you are working with your branding and style guide. The document will generate and use internally and/or with your 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 you to collaborate with colleagues or third parties.

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

0 Records

Subject

Sign up at www.kimdocument.com



The screenshot shows the homepage of the Kim Technologies website. At the top left is the 'kim' logo. The top right navigation bar includes links for 'For you', 'Our pricing', 'Test now', and 'Videos', followed by a 'Try now for free' button and a hamburger menu icon. The main content area features a large white heading 'Document and forms automation' on a dark blue background. Below the heading is a sub-headline: 'No training required. From \$50/£50 per month. Live in minutes. From your browser or MS Teams.' At the bottom of the main content area are three rounded buttons: 'Try now for free' (white), 'PoC in a Day' (green), and 'Case Study' (purple).

© Kim Technologies 2022 - Patents Granted: US 10,817,662 and 10,733,366

www.kimdocument.com