



Introduction to the Kim Document Workspace

May 2022

Available from your browser or MS Teams

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

Business need

Kim Document is a forms, documents and records management productivity tool.

Use from your web browser or Microsoft Teams.

Create, share and collaborate internally and/or externally using web applications for compliance, insurance, legal, services and other business verticals.

Web applications



**Turn your documents into
web applications**

Web applications



Digitise Your Business
Because you create your own Applications menu, you can digitise your documents by business unit, function, document type, geography ... Whatever works for you

Subject	Activity	Note	Attachment	Version	Action
Kim Document Billing Statement(Invoices) Richard Yawn	May 1, 2022	Downloaded Document	0	1	⋮
Powers Inc New App 2(Legal) Richard Yawn	Apr 3, 2022	Downloaded Document	0	1	⋮
ICM LLC ISO(Sales) Richard Yawn	Apr 3, 2022	Downloaded PDF	0	1	⋮
Brown Industries One Way NDA(Legal) Richard Yawn	Apr 3, 2022	Previewed	0	1	⋮
Helping you start>Welcome) Richard Yawn		Downloaded	0	1	⋮
Kim Document Beta Test Beta Tester Application(Kim Document) Richard Yawn	Feb 16, 2022	Previewed	0	1	⋮
Adams Group One Way NDA(Legal) Richard Yawn	Nov 30, 2021	Downloaded PDF	0	1	⋮
Joetown Foundry One Way NDA(Legal) Richard Yawn	Nov 1, 2021	Updated attachment tes...	2	1	⋮
Beta Tester Feedback Beta Testers Feedback(Kim Document) Swapnil Parmar	Sep 22, 2021	Downloaded PDF	0	4	⋮
Beta Tester Feedback Beta Testers Feedback(Kim Document) Juan Berroa	Sep 13, 2021	Previewed	0	1	⋮
Beta Tester Feedback	Sep 10, 2021	Previewed	0	1	⋮

Web applications



The screenshot shows the Kim Document web application interface. The browser address bar displays "https://us.kimdocument.com/app". The page title is "Kim Document - The form, document and records management office productivity tool". The user is logged in as "Richard Yawn". The interface includes a sidebar with navigation options like "Get Started", "Quick Automation", "Applications", and "Settings". The main content area shows a list of records with columns for "Attachment", "Version", and "Action". A large blue circular overlay is centered on the screen, containing the text "Go from Manual to Automated" and a list of five bullet points.

Go from Manual to Automated

- Turn manual processes into automated Web Applications
- Turn document emailing, printing, faxing into Web Applications
- Turn compliance operations into Web Application Campaigns
- Eliminate rekeying and duplication
- Save money, increase efficiency, free time and reduce labor costs

Web applications



The screenshot displays the Kim Document web application interface. The top navigation bar includes the title "Kim Document - The form, document and records management office productivity tool", a "Help" link, and the user name "Richard Yawn". The left sidebar contains a menu with categories like "Get Started", "Quick Automation", "Applications", "Commercial", "Compliance", "Confidentiality Agreements", "eSign", "HR", "Invoices", "Kim Document", "Legal", "Negotiation Module", "Order Forms", "Sales", "Welcome", "Create New Application", and "Settings". The main content area shows a table of 75 records with columns for Subject, Activity, Note, Attachment, Version, and Action.

Subject	Activity	Note	Attachment	Version	Action
Kim Document Billing Statement(Invoices) Richard Yawn	May 1, 2022	Downloaded Document	0	1	⋮
Powers Inc New App 2(Legal) Richard Yawn	Apr 3, 2022	Downloaded Document	0	1	⋮
ICM LLC ISO(Sales) Richard Yawn	Apr 3, 2022	Downloaded PDF	0	2	⋮
Brown Industries One Way NDA(Legal) Richard Yawn	Apr 3, 2022	Previewed			
Kim Document Helping you start(Welcome) Richard Yawn	Mar 9, 2022	Downloaded Document			
Kim Document Beta Test Beta Tester Application(Kim Document) Richard Yawn	Feb 16, 2022	Previewed			
Adams Group One Way NDA(Legal) Richard Yawn	Nov 30, 2021	Downloaded PDF			
Joetown Foundry One Way NDA(Legal) Richard Yawn	Nov 1, 2021	Updated attachment tes...			
Beta Tester Feedback Beta Testers Feedback(Kim Document) Swapnil Parmar	Sep 22, 2021	Downloaded PDF			
Beta Tester Feedback Beta Testers Feedback(Kim Document) Juan Berroa	Sep 13, 2021	Previewed	0	1	⋮
Beta Tester Feedback	Sep 10, 2021	Previewed	0	1	⋮

Use Cases

We use Kim Document for proposals, reports, compliance, invoicing, support requests, contracts ... You can use Kim for any of your letters, forms, checklists, contracts, compliance records, campaigns ...

Unified Workspace

Introduction to the Workspace

1. Applications
2. Records
3. Create Application
4. Search
5. Settings

Unified workspace



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

Help Richard Yawn

75 Records

Search

Applications

Subject	Activity	Note	Attachment	Version	Action
Kim Document Billing Statement(Invoices) Richard Yawn	May 1, 2022	Downloaded Document	0	1	
Powers Inc New App 2(Legal) Richard Yawn	Apr 3, 2022	Downloaded Document	0	1	
ICM LLC ISO(Sales) Richard Yawn	Apr 3, 2022	Downloaded PDF	0	2	
Brown Industries One Way NDA(Legal) Richard Yawn	Apr 3, 2022	Previewed			
Kim Document Helping you start>Welcome) Richard Yawn	Mar 9, 2022	Downloaded			
Kim Document Beta Test Beta Tester Application(Kim Document) Richard Yawn	Feb 16, 2022	Previewed			
Adams Group One Way NDA(Legal) Richard Yawn	Nov 30, 2021	Downloaded			
Joetown Foundry One Way NDA(Legal) Richard Yawn	Nov 1, 2021	Uploaded			
Beta Tester Feedback Beta Testers Feedback(Kim Document) Swapnil Parmar	Sep 22, 2021	Downloaded			
Beta Tester Feedback Beta Testers Feedback(Kim Document) Juan Berroa	Sep 13, 2021	Previewed			
Beta Tester Feedback	Sep 10, 2021	Previewed			

+ Create New Application

Settings

Unified Workspace

1. Applications (for Users to create documents)
2. Records (the Documents created that Users can action)
3. Create Application (so Users can create new applications)
4. Search (so Users can find what they need)
5. Settings (so you can provide Usage rights)

1. Applications

The screenshot shows the Kim Document web application interface. The browser address bar displays <https://us.kimdocument.com/app>. The page title is "Kim Document - The form, document and records management office productivity tool". The user is logged in as "Richard Yawn".

The left sidebar menu is highlighted with a red box and includes the following items:

- Get Started
- Quick Automation
- Applications** (highlighted with a red box)
 - Select application from category and fill form.
 - Commercial
 - Compliance
 - Confidentiality Agreements
 - eSign
 - HR
 - Invoices
 - Kim Document
 - Legal
 - One Way NDA
 - SoW
 - Negotiation Module
 - Order Forms
 - Sales
- Welcome
- + Create New Application
- Settings

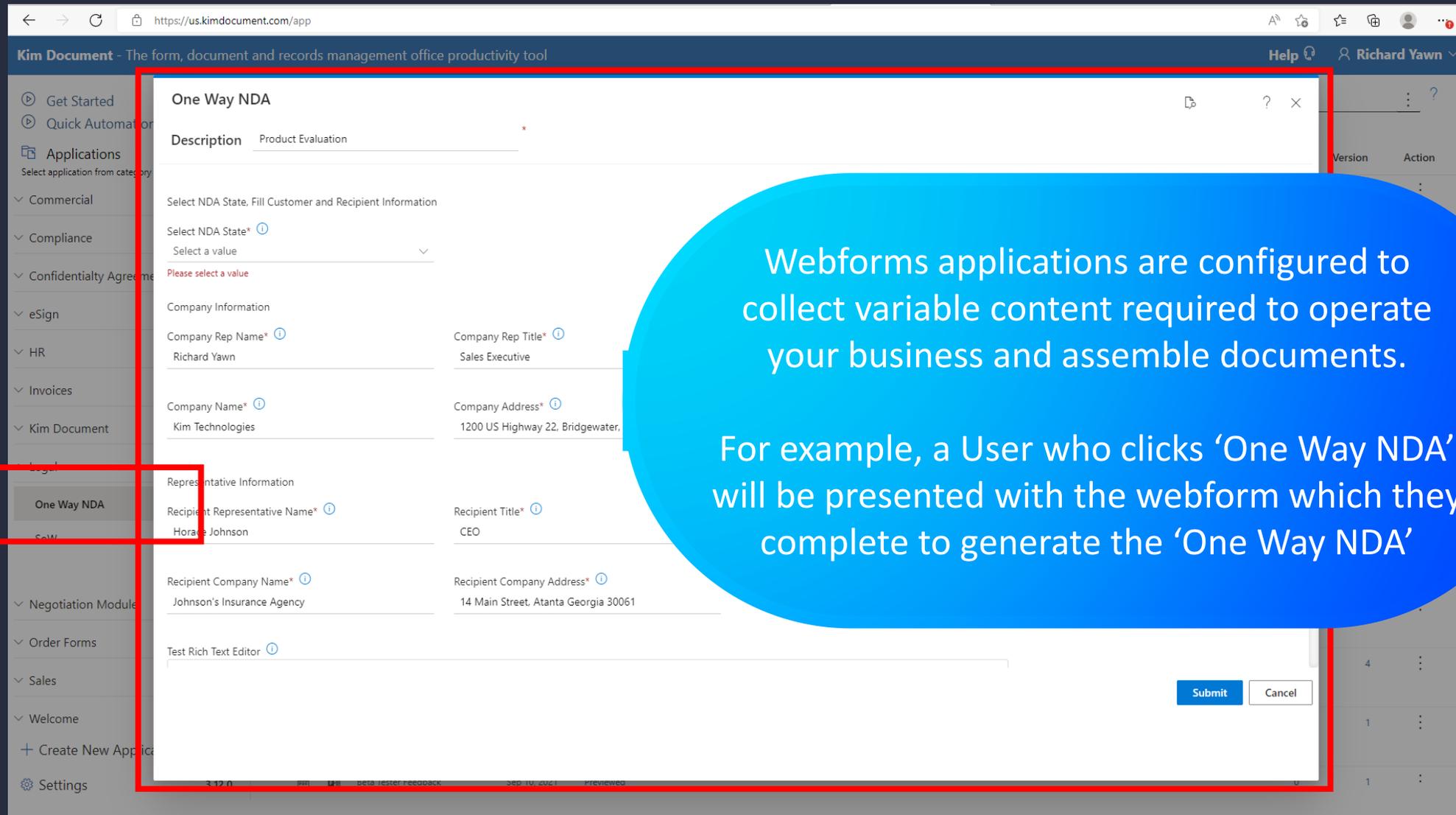
The main content area displays a table of applications. A blue tooltip titled "Applications" is overlaid on the table, providing instructions: "Applications are either created by or shared with you. Expand category to list applications. Clicking the application link opens the webform. Click the menu to manage the application." A "More info" button is visible in the tooltip.

The table lists various applications with columns for Activity, Note, Attachment, Version, and Action. A red arrow points to the "Kim Document" application entry in the table.

Activity	Note	Attachment	Version	Action	
1, 2022	Downloaded Document	0	1	⋮	
3, 2022	Downloaded Document	0	1	⋮	
New App 2(Legal) Richard Yawn					
ICM LLC ISO(Sales) Richard Yawn	Apr 3, 2022	Downloaded PDF			
Brown Industries One Way NDA(Legal) Richard Yawn	Apr 3, 2022	Previewed			
Kim Document Helping you start(Welcome) Richard Yawn	Mar 9, 2022	Downloaded			
Kim Document Beta Test Beta Tester Application(Kim Document) Richard Yawn	Feb 16, 2022	Previewed			
Adams Group One Way NDA(Legal) Richard Yawn	Nov 30, 2021	Downloaded PDF			
Joetown Foundry One Way NDA(Legal) Richard Yawn	Nov 1, 2021	Updated attachment tes...	2	1	⋮
Beta Tester Feedback Beta Testers Feedback(Kim Document) Swapnil Parmar	Sep 22, 2021	Downloaded PDF	0	4	⋮
Beta Tester Feedback Beta Testers Feedback(Kim Document) Juan Berroa	Sep 13, 2021	Previewed	0	1	⋮
Beta Tester Feedback	Sep 10, 2021	Previewed	0	1	⋮

Digitise Your Business
Because you create your own Applications menu, you can digitise your documents by business unit, function, document type, geography ... Whatever works for you

1. Applications



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

Help Richard Yawn

One Way NDA

Description Product Evaluation

Select NDA State, Fill Customer and Recipient Information

Select NDA State*
Select a value
Please select a value

Company Information

Company Rep Name* Richard Yawn
Company Rep Title* Sales Executive

Company Name* Kim Technologies
Company Address* 1200 US Highway 22, Bridgewater,

Representative Information

Recipient Representative Name* Horace Johnson
Recipient Title* CEO

Recipient Company Name* Johnson's Insurance Agency
Recipient Company Address* 14 Main Street, Atanta Georgia 30061

Test Rich Text Editor

Submit Cancel

Webforms applications are configured to collect variable content required to operate your business and assemble documents.

For example, a User who clicks 'One Way NDA' will be presented with the webform which they complete to generate the 'One Way NDA'

1. Applications



The screenshot displays the Kim Document web application. The browser address bar shows the URL <https://us.kimdocument.com/app>. The page title is "Kim Document - The form, document and records management office productivity tool". The user is logged in as "Richard Yawn". A "Document Preview" window is open, showing a document titled "NON-DISCLOSURE AGREEMENT". The document text includes the following:

NON-DISCLOSURE AGREEMENT

between, Richard Yawn a Kim Technologies corporation having its principal place of business in Water, NJ 08807 ("Company") and, Horace Johnson a Johnson's Insurance Agency corporation located at 14 Main Street, Atlanta Georgia 30061 ("Recipient").

Confidentiality. As used in this Agreement, "Confidential Information" refers to any information that is either (i) technical information, including patent, copyright, trade secret, and other information, techniques, sketches, drawings, models, inventions, know-how, processes, apparatus, equipment, software programs, software source documents, and formulae related to the current, future and proposed products and services of Company, or (ii) non-technical information relating to Company's products, including without limitation pricing, margins, merchandising plans and strategies, finances, financial and accounting data and information, suppliers, customers, customer lists, purchasing data, sales and marketing plans, future business plans and any other information which is proprietary and confidential to Company.

When a User completes the webform it automatically generates the NDA (**NOTE** you can apply your logo and your brand guidelines to any documents you upload into Kim)

1. Applications

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

Help Richard Yawn

76 Records

Subject	Activity	Note	Attachment	Version	Action
Product Evaluation One Way NDA(Legal) Richard Yawn	May 26, 2022	Created document	0	1	⋮
Kim Document Billing Statement(Invoices) Richard Yawn	May 1, 2022	Downloaded Document	0	1	⋮
Powers Inc New App 2(Legal) Richard Yawn	Apr 3, 2022	Downloaded Document	0	1	⋮
			0	2	⋮
			0	2	⋮
			0	1	⋮
			0	1	⋮
			1	2	⋮
			2	1	⋮
Beta Tester Feedback Beta Testers Feedback(Kim Document) Swapnil Parmar	Sep 22, 2021	Downloaded PDF	0	4	⋮
Beta Tester Feedback	Sep 13, 2021	Previewed	0	1	⋮

Record Created
Having completed and submitted the form the One Way NDA is created (this could have been any document – SoW, Order Form, Compliance Document, Contract, Sales Agreement ...)

3.12.0

1. Applications

The screenshot shows the Kim Document web application interface. The top navigation bar includes the title "Kim Document - The form, document and records management office productivity tool" and the user name "Richard Yawn". The left sidebar contains a navigation menu with categories like "Get Started", "Quick Automation", "Applications", "Commercial", "Compliance", "Confidentiality Agreements", "eSign", "HR", "Invoices", "Kim Document", "Legal", "Negotiation", "Order Forms", "Sales", and "Welcome". The main content area displays a table of records with columns for "Subject", "Activity", and "Note". A red callout bubble is overlaid on the table, containing the text: "Record Created Having created the record a User now has numerous ways of collaborating with internal and external parties via the Actions menu (see the separate 'Collaboration' deck for full details)". A red arrow points from this bubble to a context menu that is open over one of the records. The context menu is enclosed in a red rectangular box and lists various actions: Activity (with a sub-menu "View activity"), Attachment, Checkout, Copy, Delete, Download, Manage, Note, Preview, Send Mail, Send Webform Update Link, Share, Sign, Subform, and Update Webform.

Subject	Activity	Note
Product Evaluation One Way NDA(Legal) Richard Yawn	May 26, 2022 Created document	
Kim Document Billing Statement(Invoices) Richard Yawn	May 1, 2022 Downloaded Document	
Powers Inc New App 2(Legal) Richard Yawn	Apr 3, 2022 Downloaded Document	

Record Created
Having created the record a User now has numerous ways of collaborating with internal and external parties via the Actions menu (see the separate 'Collaboration' deck for full details)

- Activity (View activity)
- Attachment
- Checkout
- Copy
- Delete
- Download
- Manage
- Note
- Preview
- Send Mail
- Send Webform Update Link
- Share
- Sign
- Subform
- Update Webform

2. Records



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

Help Richard Yawn

75 Records

Search

Records

When selecting an application, the form wizard appears. Fill form wizard and submit to create record with document in your Workspace. Records other users share with you are displayed in the Workspace, too. You can share your records with other users to be displayed in their Workspace.

Notes and attachments may be added as needed. Each action on your record is recorded in Activity. Limit or expand records displayed in your Workspace using Search. Electronic signing of documents is also available.

[More info](#)

Activity	Note	Attachment	Version	Action
Downloaded Document		0	1	⋮
Downloaded Document		0	1	⋮
Downloaded PDF		0	2	⋮
Previewed		0	2	⋮
Downloaded Document	Kim Document Helping you start(Welcome) Richard Yawn	0	1	⋮
Previewed	Kim Document Beta Test Beta Tester Application(Kim Document) Richard Yawn			⋮
Downloaded PDF	Adams Group One Way NDA(Legal) Richard Yawn			⋮
Updated attachment tes...	Joetown Foundry One Way NDA(Legal) Richard Yawn			⋮
Downloaded PDF	Beta Tester Feedback Beta Testers Feedback(Kim Document) Swapnil Parmar	0	4	⋮
Previewed	Beta Tester Feedback Beta Testers Feedback(Kim Document) Juan Berroa	0	1	⋮
Previewed	Beta Tester Feedback	0	1	⋮

As a User works, individual records are created

2. Records - Options

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

Help Richard Yawn

76 Records

Subject	Activity	Note	Attachment	Version	Action
Product Evaluation One Way NDA(Legal) Richard Yawn	May 26, 2022 Created document		0	1	⋮
Kim Document Billing Statement(Invoices) Richard Yawn	May 1, 2022 Downloaded Document		0	1	⋮
Powers Inc New App 2(Legal) Richard Yawn	Apr 3, 2022 Downloaded Document		0	1	⋮
ICM LLC ISO(Sales) Richard Yawn	Apr 3, 2022 Downloaded PDF		0	2	⋮
Brown Inc One Way NDA(Legal) Richard Yawn				2	⋮
Kim Document Helping Richard Yawn				1	⋮
Kim Document Beta Tester Application(Kim Document) Richard Yawn				1	⋮
Adams Group One Way NDA(Legal) Richard Yawn	Nov 30, 2021 Downloaded PDF		1	2	⋮
Joetown Foundry One Way NDA(Legal) Richard Yawn	Nov 1, 2021 Updated attachment tes...		2	1	⋮
Beta Tester Feedback Beta Testers Feedback(Kim Document) Swapnil Parmar	Sep 22, 2021 Downloaded PDF		0	4	⋮
Beta Tester Feedback	Sep 13, 2021 Previewed		0	1	⋮

For each record a User can view Activity, create a Note, Attach documents, manage Version control and take numerous Actions

2. Records - Activity



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

76 Records

Subject	Activity	Note	Attachment	Version	Action	
Product Evaluation One Way NDA(Legal)	May 26, 2022	Added note for docume...	Joe, could you evaluate this NDA and determine if you'd like to sign on our behalf?	0	1	⋮
Activity (Product Evaluation)						
Created	Username	Activity				
Thu, May 26, 2022 4:32 PM	Richard Yawn	Added note for document One Way NDA (Product Evaluation) by user Richard Yawn (richard.yawn@kimtechnologies.com)				
Thu, May 26, 2022 3:54 PM	Richard Yawn	Created document 'Product Evaluation' by User Richard Yawn (richard.yawn@kimtechnologies.com)				
Joetown Foundry One Way NDA(Legal) Richard Yawn						
Beta Tester Feedback Beta Testers Feedback(Kim Document)	Sep 22, 2021	Downloaded PDF		0	4	⋮
Beta Tester Feedback	Sep 13, 2021	Previewed		0	1	⋮

Activity provides the full audit trail related to a record

2. Records - Notes



You can add a **Note** at any time. These notes can be marked private or be available for all who have access to the record to see

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

76 Records

Search

Subject	Activity	Note	Attachment	Version	Action	
Product Evaluation	New Record	May 26, 2022	Created document	0	1	⋮
				0	1	⋮
				0	1	⋮
				0	2	⋮
				0	2	⋮
				0	1	⋮
				0	1	⋮
				1	2	⋮
				2	1	⋮
				0	4	⋮
				0	1	⋮

Note (Product Evaluation)

Go back to list

Note

Joe, could you evaluate this NDA and determine if you'd like to sign on our behalf?

Private

Save

2. Records - Attachments



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

76 Records

Subject	Activity	Note	Attachment	Version	Action	
Product Evaluation One Way NDA(Legal)	May 26, 2022	Attachment Invoice.pdf (...)	Joe, could you evaluate this NDA and determine if you'd like to sign on our behalf?	1	1	⋮
				0	1	⋮
				0	1	⋮
				0	2	⋮
				0	2	⋮
				0	1	⋮
				0	1	⋮
Joetown Foundry One Way NDA(Legal) Richard Yawn	Nov 1, 2021	Updated attachment tes...				
Beta Tester Feedback Beta Testers Feedback(Kim Document) Swapnil Parmar	Sep 22, 2021	Downloaded PDF				
Beta Tester Feedback	Sep 13, 2021	Previewed				

Attachment (Product Evaluation)

Add Attachment

Attachment Name	Created	Username	Description	Private	Action
Invoice.pdf	Thu, May 26, 2022 4:39 PM	Richard Yawn (richard.yawn@ki...	Invoice arrangement	<input type="checkbox"/>	⋮

You can add Attachments at any time to support the record.

2. Records – Version control



Whenever a new document is created on a record it is automatically tracked as a new (latest) Version

The screenshot shows the Kim Document web application interface. The main area displays a list of 76 records. A popup window titled "Version (Product Evaluation)" is open, showing a table of document versions.

Created	Username	Version	Action
Thu, May 26, 2022 4:44 PM	Richard Yawn	2	Current
Thu, May 26, 2022 4:44 PM	Richard Yawn	1	

The background record list includes columns for Subject, Activity, Note, Attachment, Version, and Action. The first record is "Product Evaluation" with a note about changing the state from Georgia to Florida.

2. Records – Sub-records



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

Help Richard Yawn

76 Records

Subject	Activity	Note	Attachment	Version	Action
Product Evaluation One Way NDA(Legal) Richard Yawn	May 26, 2022 Downloaded PDF	Joe, they want to do business out of Florida instead of Georgia. We had to change the state.	1	2	Activity Attachment
Kim Document Billing Statement(Invoices) Richard Yawn	May 1, 2022 Downloaded Document		0		
Powers Inc New App 2(Legal) Richard Yawn	Apr 3, 2022 Downloaded Document				
ICM LLC ISO(Sales) Richard Yawn	Apr 3, 2022 Downloaded PDF				
Brown Industries One Way NDA(Legal) Richard Yawn	Apr 3, 2022 Previewed				
Kim Document Helping you start(Welcome) Richard Yawn	Mar 9, 2022 Downloaded Document				
Kim Document Beta Test Beta Tester Application(Kim Document) Richard Yawn	Feb 16, 2022 Previewed				
Adams Group One Way NDA(Legal) Richard Yawn	Nov 30, 2021 Downloaded PDF				
Joetown Foundry One Way NDA(Legal) Richard Yawn	Nov 1, 2021 Updated attachment tes...				
Beta Tester Feedback Beta Testers Feedback(Kim Document) Swapnil Parmar	Sep 22, 2021 Downloaded PDF		0	4	
Beta Tester Feedback	Sep 13, 2021 Previewed		0	1	

Kim also has the concept of sub-records. Sub records are family members directly associated to lead record. For instance, a lead record that is a 'Contract Request Form' could have NDAs, Orders and Contracts created from the 'Contract Request Form'.

3. Create applications



Create an application

**Turn your documents into
web applications**

3. Create application

Create Application

There are three steps to creating a new application. Take your existing Word document (letter, form, checklist, contract, compliance record ...) and simply



Tag it

Upload it

Automate it



3. Create application – Tag it

Tag it

Take your existing Word document and tag the variable fields with [\$TagName]. For example if you want a User to add Counterparty Name use the tag [\$CounterpartyName]

Confidentiality Agreement M...



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

1. KIM TECHNOLOGIES LIMITED incorporated and registered in England and Wales with company number 09687973 whose registered office is at One Central Boulevard, Blyth Valley Park, Solihull, West Midlands, B90 8BG, United Kingdom; and
2. [\$CounterpartyName] whose registered office is at [\$CounterpartyAddress]

(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

3. Create application – Tag it

Tag it

Take your existing Word document and tag the variable fields with [\$TagName]. For example if you want a User to add Counterparty Name use the tag [\$CounterpartyName]

Confidentiality Agreement M...



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

1. KIM TECHNOLOGIES LIMITED incorporated and registered in England and Wales with company number 09687973 whose registered office is at One Central Boulevard, Blyth Valley Park, Solihull, West Midlands, B90 8BG, United Kingdom; and
2. [\$CounterpartyName] whose registered office is at [\$CounterpartyAddress]

(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.

If you are not familiar with the term 'tag', then think of it as a way of indicating something that is going to be automated. For example, if you write the word 'date' in a word document, that is just a word. But if we 'tag' it, using the dollar sign and square brackets (i.e. [\$Date]), then Kim recognises it and changes it from a simple word into an active element (or field). When Kim sees this in a document, it translates it into a field which prompts Users to enter the necessary information, generate the document, enabling data analysis.

c) from a person who, to the Recipient's knowledge, is not bound by a

3. Create application – Upload it

Upload it
In Kim select 'Create New Application'
Fill in the document details

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

Help Karl Chapman

7 Records

Create New Application

Properties

- Example Applications
- Guides
 - 1. Tag It
 - 2. Upload It
 - 3. Automate It
 - 4. Collaboration
 - 5. Compliance Campaigns
- Automate From Document

Properties

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.) *

Audience (the Users who will be able to access this application.)

Create Cancel

+ Create New Application

3. Create application – Upload it

The screenshot shows a web application interface for creating a document application. An 'Open' file dialog is overlaid on the left, showing a list of files. A red box highlights the 'Choose File' button in the application form. Red arrows point from the 'Choose File' button to the file list and from a blue callout bubble to the 'Choose File' button.

Name	Date modified	Type
Kim Doc Template for Marketing Trainin...	29/05/2022 09:09	Mi
Kim Document Work Applications	29/05/2022 09:03	Mi
Kim Document Workspace June 2022	02/06/2022 15:04	Mi

File name: All Files

Open Cancel

1. Tag It

2. Upload It

3. Automate It

4. Collaboration

5. Compliance Campaigns

Automate From Document

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.) *

Audience (the Users who will be able to access this application.)

Culture*
English (United States) - [en-US] X

Choose File

Create Cancel

Upload it
Select the document that you have tagged and upload it.

3. Create application - Automate it

Tags

All the tags from the document you uploaded automatically appear in the menu.

You are now ready to use Kim's automation wizard to create the form a User will complete

Version	Action
2	⋮
1	⋮
1	⋮
2	⋮
	⋮
1	⋮
2	⋮
1	⋮
4	⋮
1	⋮

3. Create application – Automate it



Wizard

You can drag-and-drop the tags from the left-hand menu to create the layout you want

Application (Sales Service Mutual NDA)

Drag controls from the left panel onto the palette where you want them located. Use the gear icon to set the controls properties. (When you have finalised the Wizard slide to blue so that it can be accessed by Users and Save)

General Informat...
NDAState
Supplier
CompanyName
CompanyRepresentative
SectionHeader4
RecipientCompanyName
RecipientRepresentative

CompanyAddress
CompanyRepresentativeTitle
RecipientCom
RecipientTitle

Properties

NDAState

Field Label
NDAState

Field Type
Drop Down List

Tooltip Text

Tooltip Url

Control Column Span
1

Required
Static List

Item list(separate each item with a comma):

Apply

Properties

For each tag you can use properties to specify labels, whether a field is mandatory (required) ...

3. Create application – Automate it

Preview
At any time you can preview the layout before you finalise the look and feel of the form

3. Create application – Automate it

Application (One Way NDA)

Drag controls from the left panel onto the palette where you want them located. Use the gear icon to set the controls properties. (When you have finalised the Wizard slide to blue so that it can be accessed by Users and Save)

NewTag

Select NDA State, Fill Customer and Recipient Information

*Select NDA State

Drop Down List

*Company Inform...

*Company Rep Name

*Company Rep Title

*Company Name

*Company Address

Representative I...

*Recipient Representative Name

*Recipient Title

*Recipient Company Name

*Recipient Company Address

Test Rich Text Editor

Richard Yawn

Version	Action
2	⋮
1	⋮
4	⋮
1	⋮

1

Save and Release
When you are happy with the form save and release it, and it will be visible in the left-hand menu to the Users (Audiences) you have made it available to

3. Create application - Guides

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

7 Records

Create New Application

- Properties
- Example Applications
 - Guides**
 - 1. Tag It
 - 2. Upload It
 - 3. Automate It
 - 4. Collaboration
 - 5. Compliance Campaigns
 - Automate From Document

Description (the purpose of the document)

Default Form Wizard Description (this value d

Email From Friendly Name (name that will appear From em

Category (the section in the sidebar that the document will be listed under.) *

Audience (the Users who will be able to access this application.)

Culture*
English (United States) - [en-US] X

Choose File

Create Cancel

4. Search

A large, rounded rectangular button with a horizontal gradient from pink on the left to purple on the right. The word 'Search' is centered on the button in a white, sans-serif font.

Search

4. Search

Search
You can search your records via the search box or select the three dots and open Advanced Search

The screenshot shows the Kim Document interface with a search bar at the top right. A red box highlights the search bar and the three dots menu. A red arrow points from the three dots menu to the Advanced Search dialog box. The dialog box contains the following fields:

- Content Include Attachments
- Username: Enter email address
- Created From: Select a date... (calendar icon) ×
- To: Select a date... (calendar icon) ×
- Updated From: Select a date... (calendar icon) ×
- To: Select a date... (calendar icon) ×
- Subject: [Text input]
- Notes: [Text input]
- Application: Select an option (dropdown) ×
- Campaign: [Text input] ×
- Activity: [Text input]
- Include Closed

Buttons: Search, Close

Subject	Activity	Note	Attachment	Version	Action
On-Boarding Checklist On-Boarding Checklist(Compliance)	25 May 2022	Downloaded Document	0	1	⋮
On-Boarding Checklist On-Boarding Checklist(Compliance) Sarah Sheehan			0	1	⋮
Cost of Living Estimate Form Cost of Living Estimate Form(Compliance)... Marianne Mason	14 Apr 2022		0	1	⋮
Annual Compliance Record Data Protection & InfoSec(Compliance) Jacqueline Aquino	7 Dec 2021		0	1	⋮
Weekly Report Weekly Report(Small/Mid Businesses) Karl Chapman	16 Nov 2021		0	2	⋮
ML Declaration ML Declaration(Regulators) Karl Chapman	15 Nov 2021		2	1	⋮
Arc Order Form Order Form - Services(Legal) Karl Chapman	28 Oct 2021		0	9	⋮
Quarterly Pension Fund Complian... Pension Fund Compliance(Compliance) Karl Chapman	7 Oct 2021		0	2	⋮

5. Settings



Settings

5. Settings

The screenshot displays the Kim Document application interface. At the top, the title bar reads "Kim Document - The form, document and records management office productivity tool" with a "Help" icon on the right. Below the title bar, there is a navigation menu on the left with categories like "Get Started", "Quick Automation", "Examples", and "Applications". A "7 Records" indicator is visible in the top right of the main content area. A "Settings" modal window is open, showing a list of settings options: "My Audiences", "My Categories", "My Lists", "My Signatures", "My Billing Plan", and "My Billing Status". The "My Audiences" option is selected, and the main content area displays the "My Audiences" settings page. This page includes a title "My Audiences", a description "Audiences are distribution groups for documents you create. Create a New Audience or Edit an Existing Audience", and an "Options" dropdown menu. Below this, there is a table of audiences with columns for "Audience" and "Options". The table lists several audiences: "First Time Users (First Time Users)", "Default (karl.chapman@kimtechnologies.com(Karl Chapman))", "All Users (All Users)", "Kim Compliance Respondents (Attendance at Compliance)", and "Doc Management Team (Can edit wizards)".

Settings

Settings allow you to manage your Audiences (Users who can access which Applications), Categories (the way you group your Applications – by document, business unit, function, location ...), Lists (any lists you upload), eSignature and signing, your Billing Plan. You can also monitor your Billing Status

Document automation at the speed of light

Tag it



Upload it



Automate it



Activate it



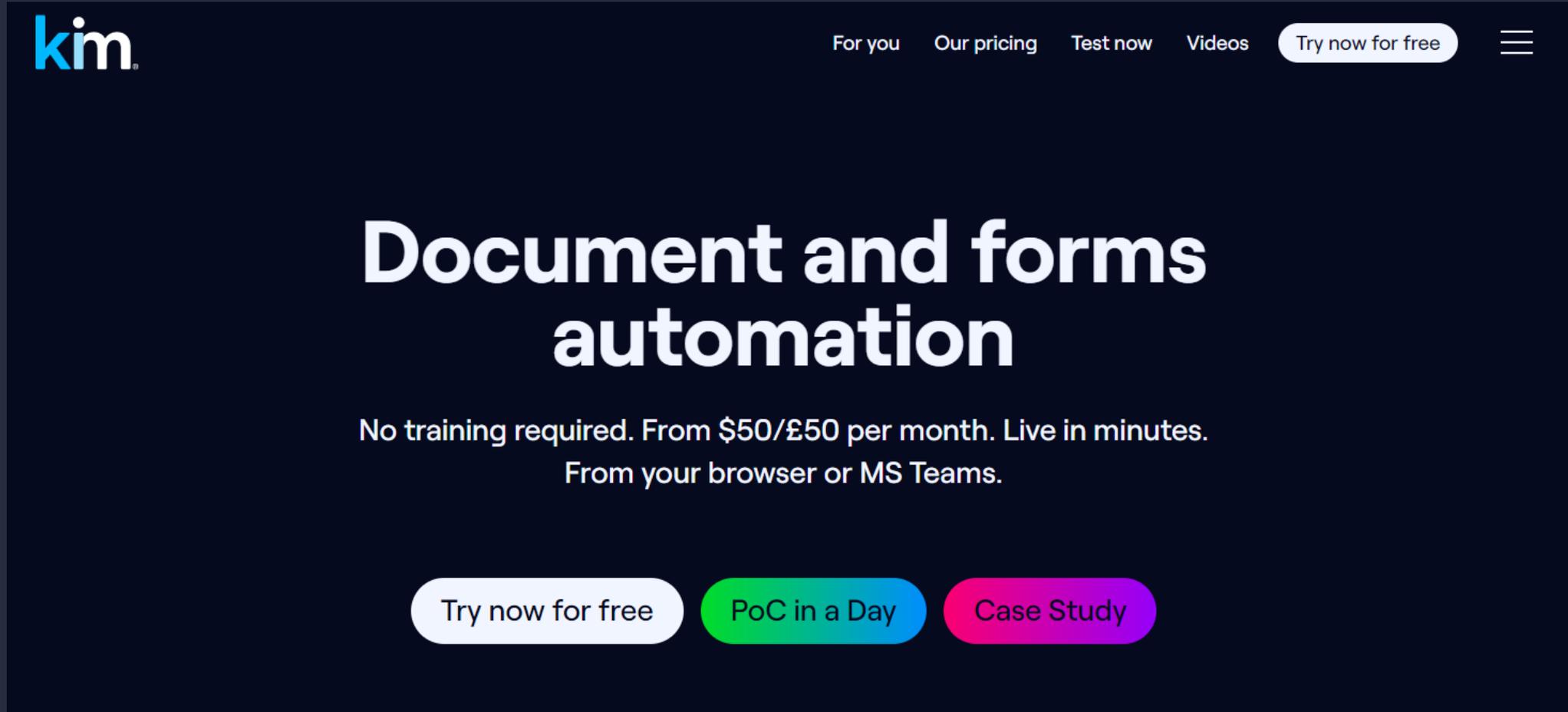
Share it



Analyze it



Sign up at www.kimdocument.com

A screenshot of the Kim Technologies website homepage. The page has a dark blue background. At the top left is the 'kim' logo. To the right of the logo are navigation links: 'For you', 'Our pricing', 'Test now', and 'Videos'. Further right is a white button with the text 'Try now for free' and a hamburger menu icon. The main content area features a large white heading 'Document and forms automation'. 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 buttons: 'Try now for free' (white), 'PoC in a Day' (green), and 'Case Study' (purple).

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