Six Collaboration Methods in Kim Document

MS Teams, Email, Share, Send Link, Campaigns, Publish Webform Link

May 2022

Available from your browser or MS Teams

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Business need

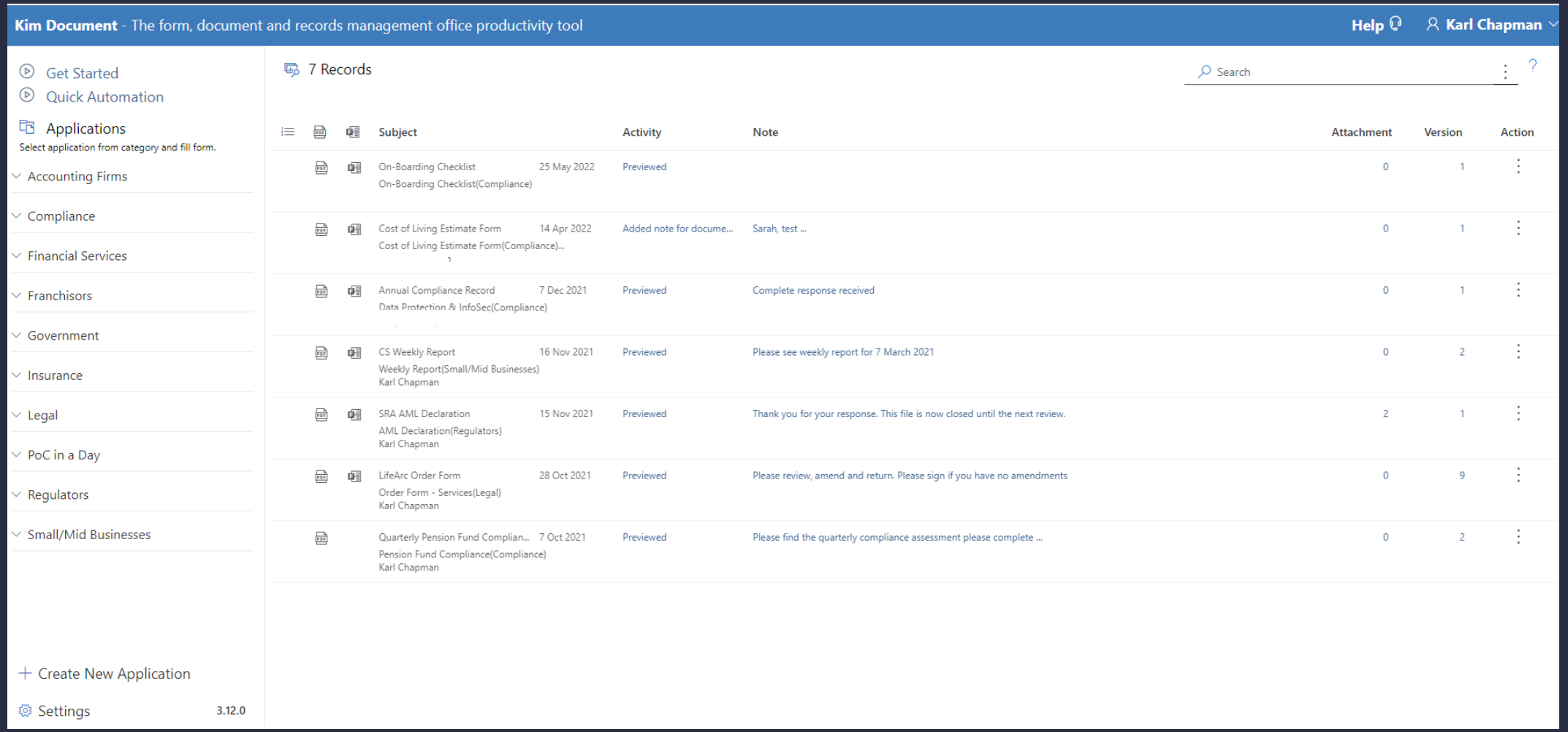
Whatever the letter, form, checklist, compliance record or contract we have automated, we want a tool that allows us to collaborate internally and/or externally. Managing all the records, versions and data extraction/analysis in one place. We want a tool that can:

- send documents via email;
- share the document and allow editing and version control;
- be sent as a web link so that a recipient simply completes the form and submits it;
- be used as campaign and sent to multiple recipients at the same time, managing the responses;
- create a published webform link (URL) that can be embedded on our internal systems or publicly facing websites for Users to access and complete; and that
- we can use seamlessly in MS Teams

Welcome to Kim Document!

Seamless in MS Teams

This is Kim Document accessed via your browser

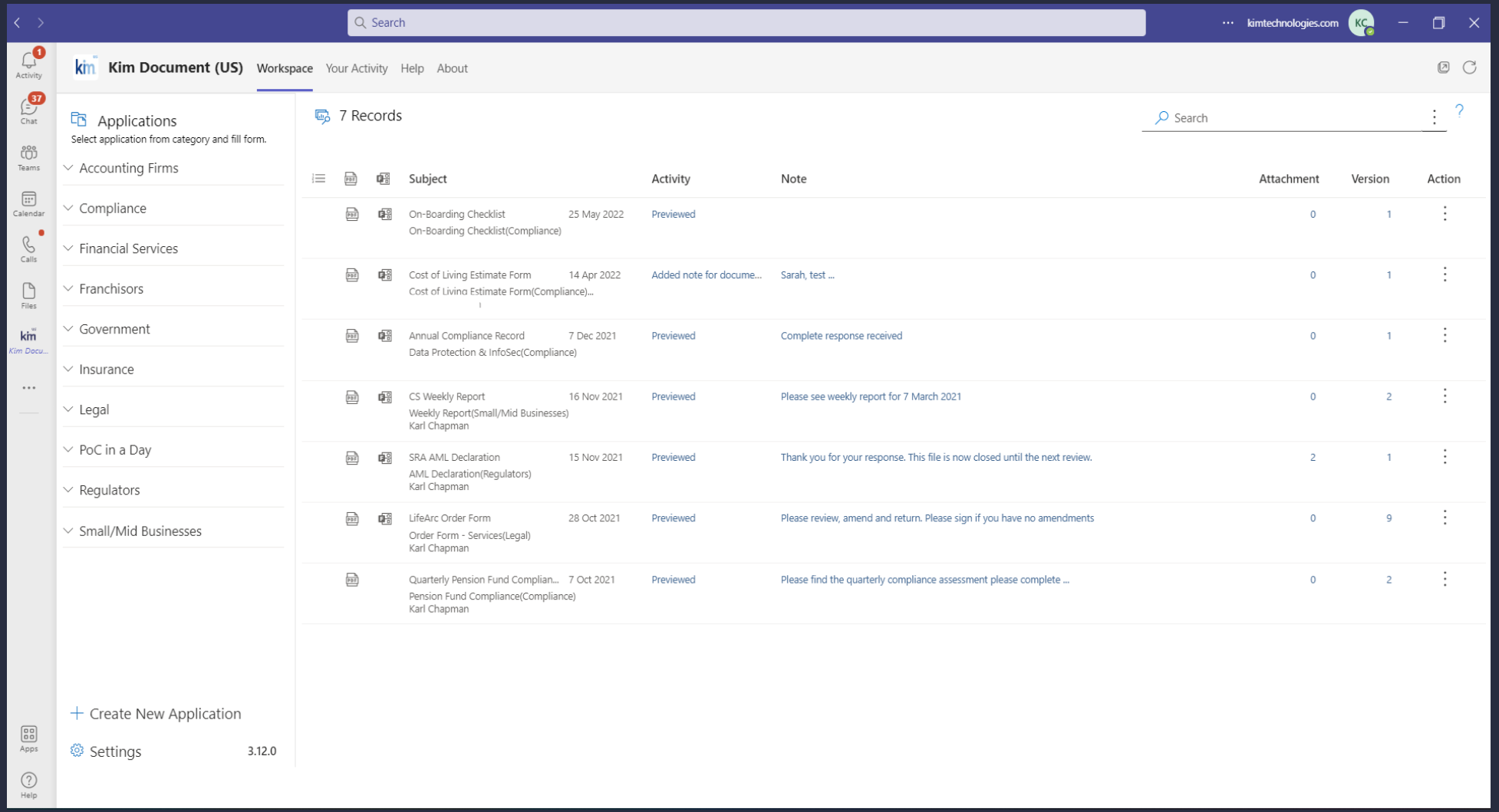


www.kimdocument.com

Seamless in MS Teams

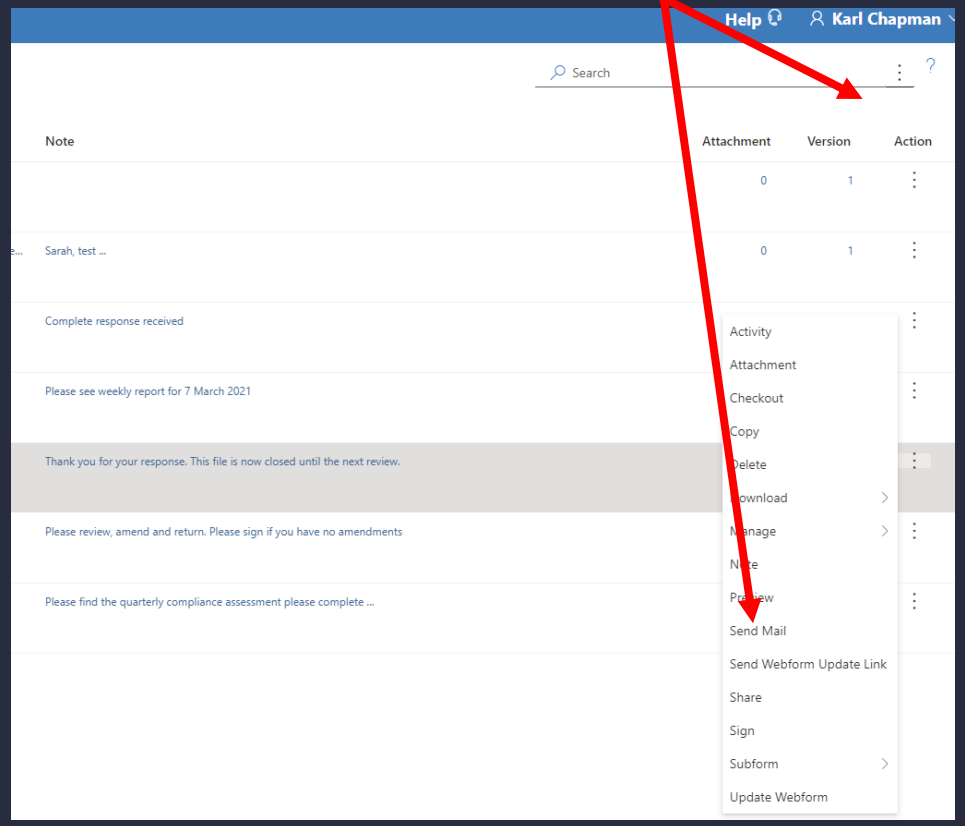
This is Kim Document in MS Teams

You have all Kim Document's functionality without leaving MS Teams

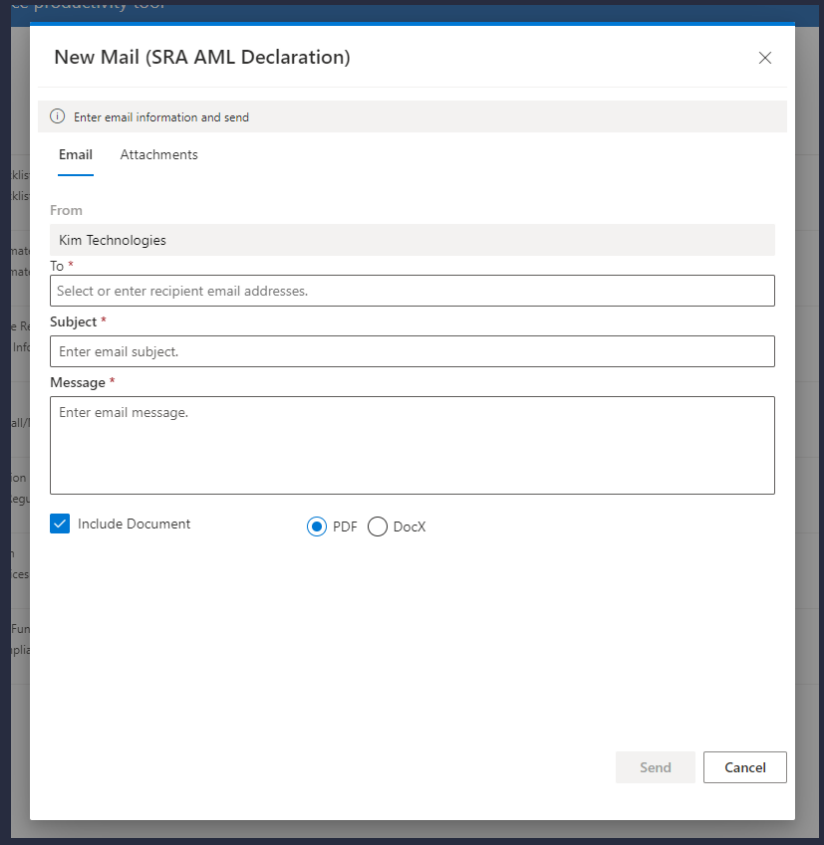


Email

1. Having created a document you want to ‘Email’, simply select ‘Action’, ‘Send Mail’

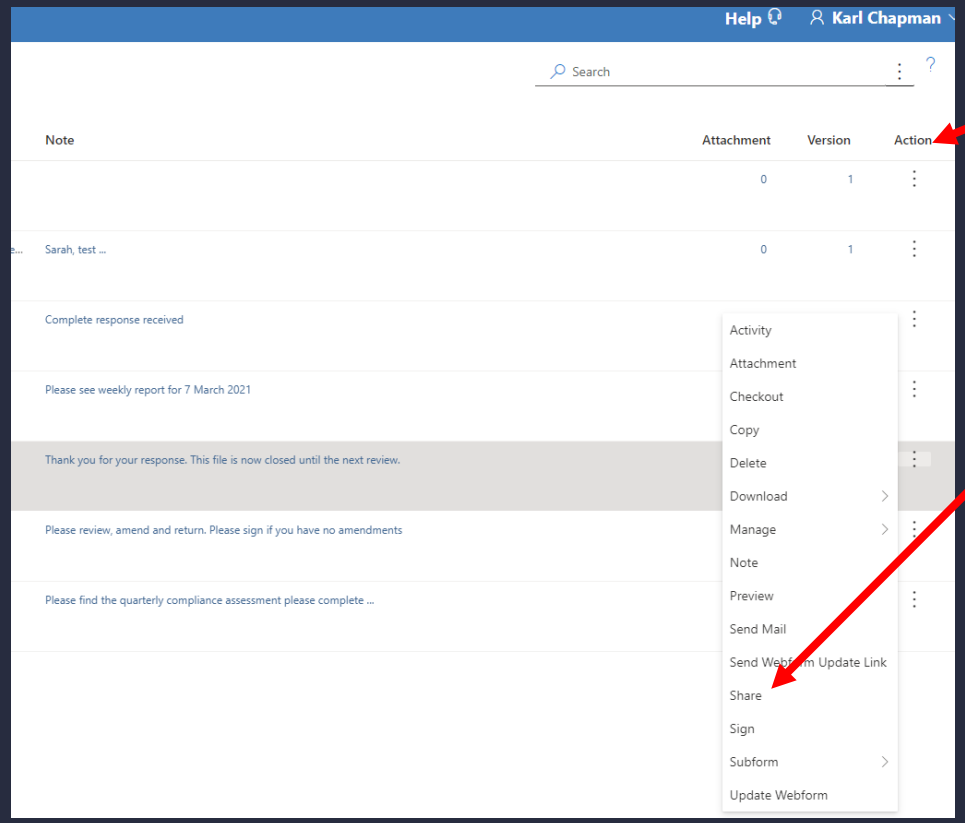


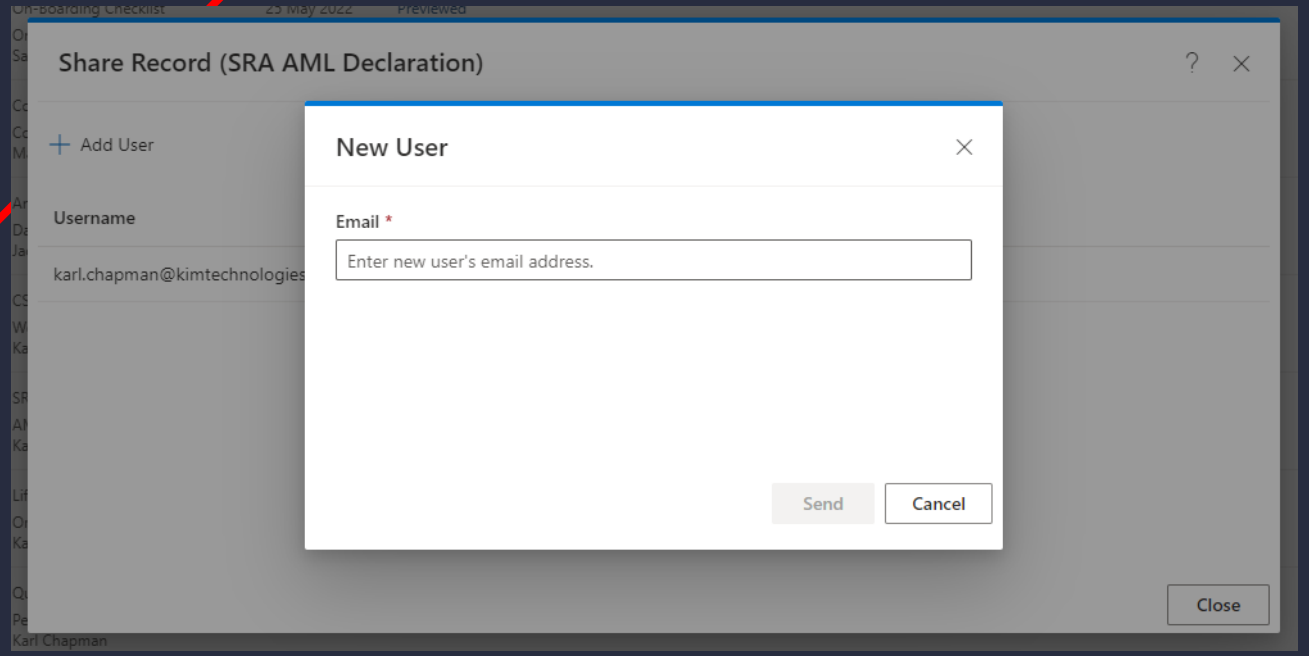
2. Add recipient details and the format of the document you want and ‘Send’. You are finished.



Share

Rather than email the document you want to ‘Share’ it with a recipient so that they can review, amend and/or sign it. Select the document you want to share’ and simply select ‘Action’, ‘Share’ and add the recipients email address





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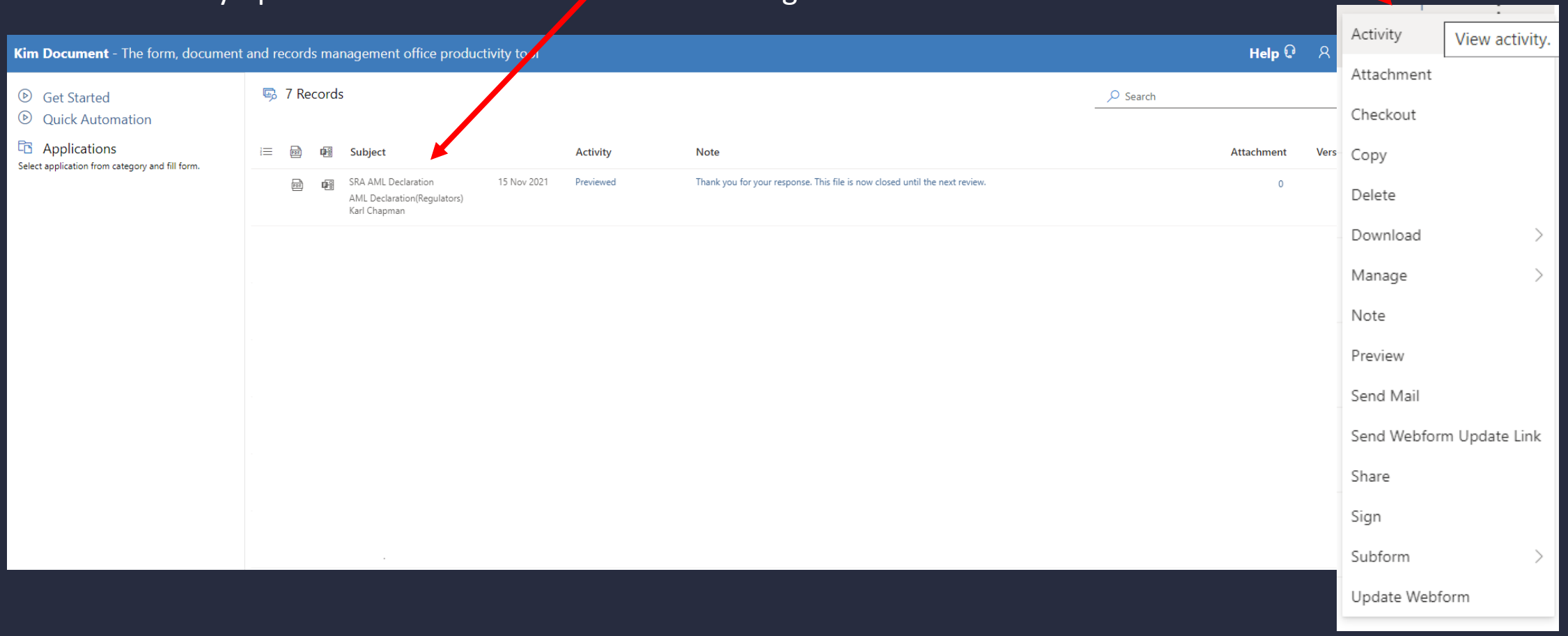
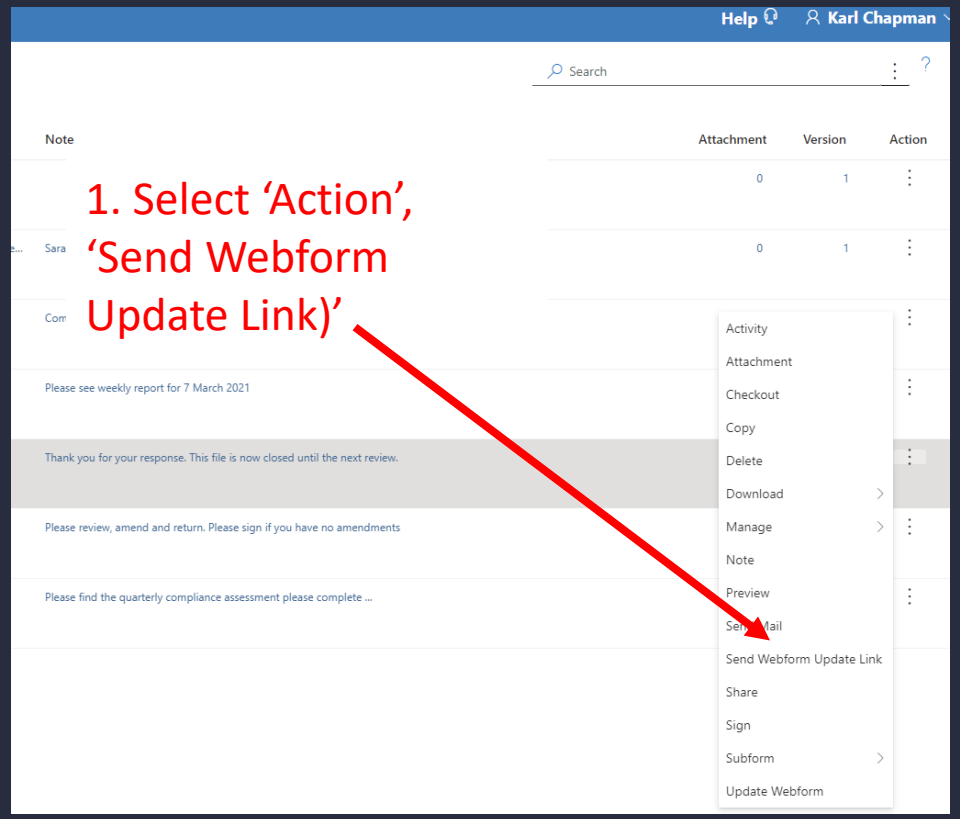
Share

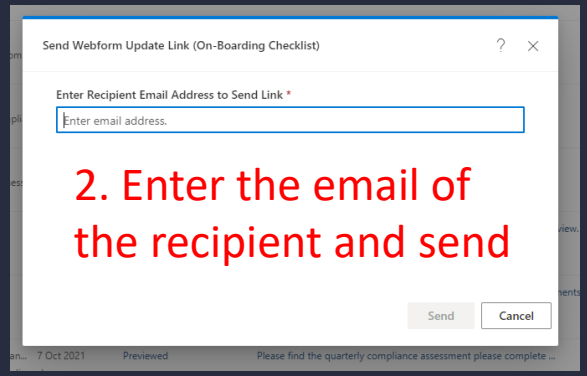
The recipient receives the email and validates the link and, without downloading any software, is presented with the Kim Document screen with only their record in it. They then have a series of different actions – preview, checkout (and check in), sign … - enabling full collaboration and version control. When a User responds it automatically updates both instances. Collaborating via 'Share'.

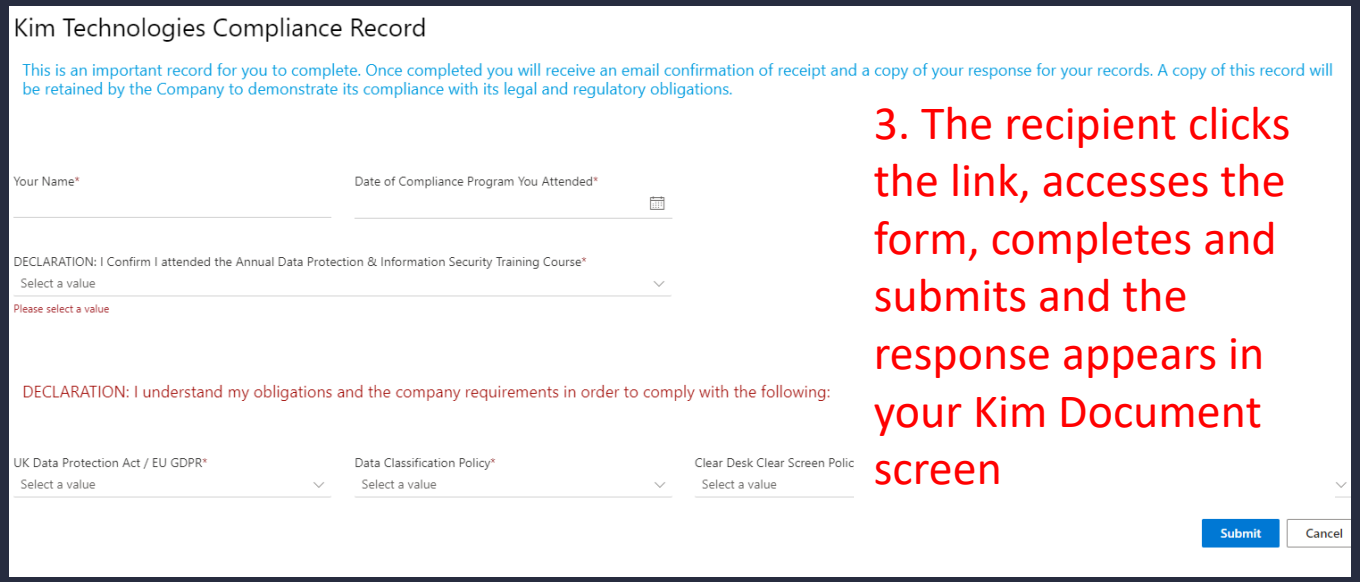


Web Link

Rather than ‘Email’ or ‘Share’ you want to simply capture some information from an internal or external party. So, having created the document (or using one you have already created) just send them a ‘Web Link’ to access and complete the form:

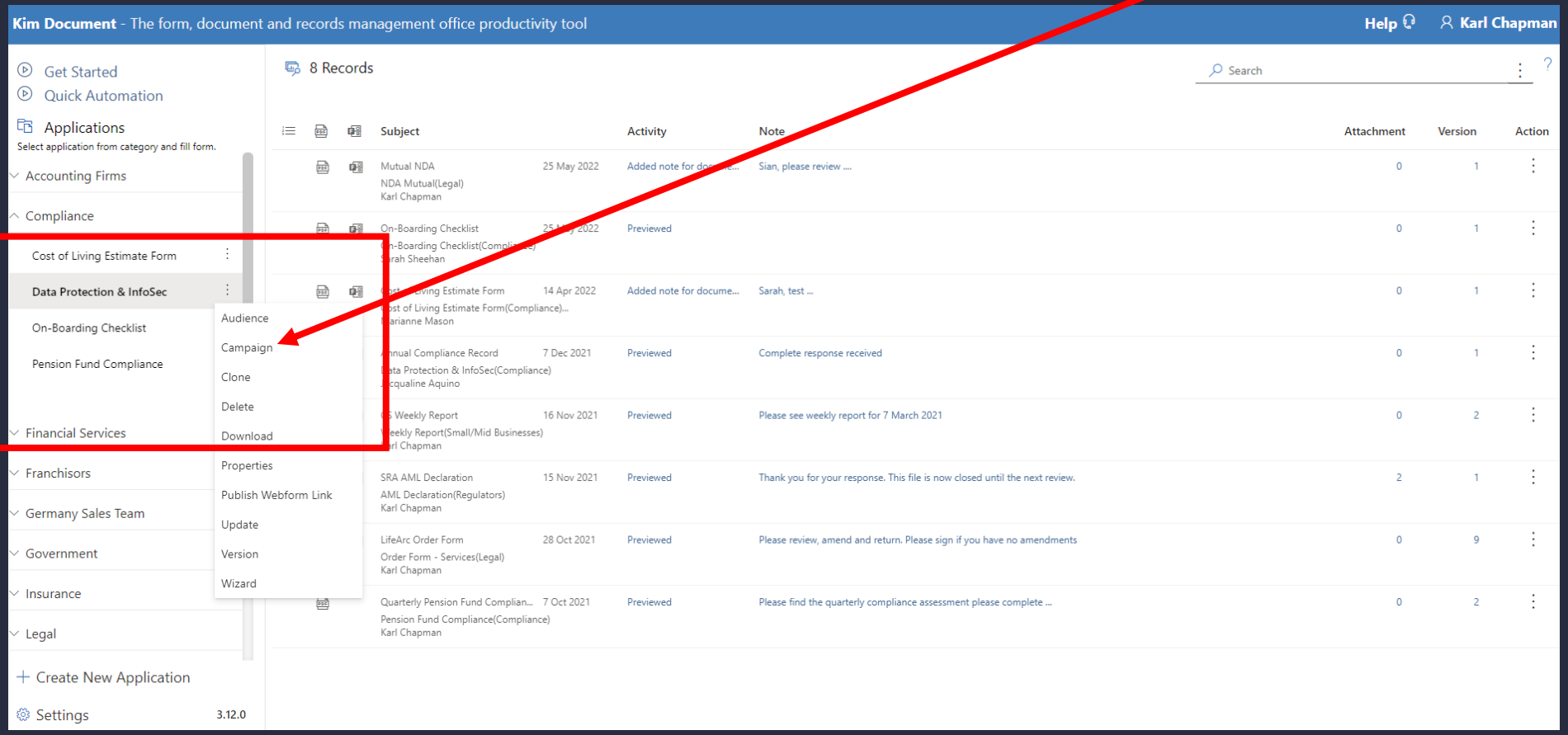






Campaign

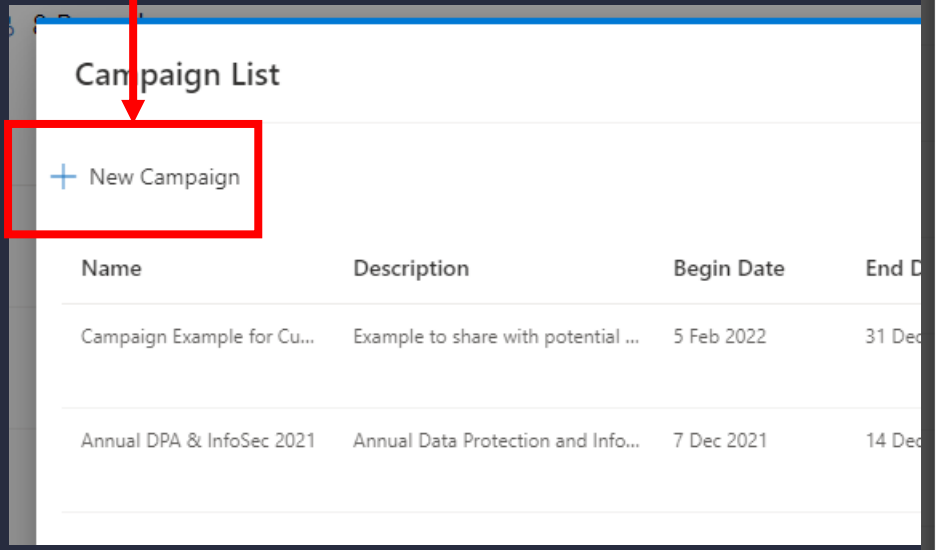
Rather than ‘email’, ‘share’ or ‘send webform update link’ your Use case is that you need to send a form to many 10’s or 100’s of Users at the same time, with the ability to track responses, send reminders, analyse the data and store the records. Having created your form, checklist or whatever it is, select ‘Campaign’

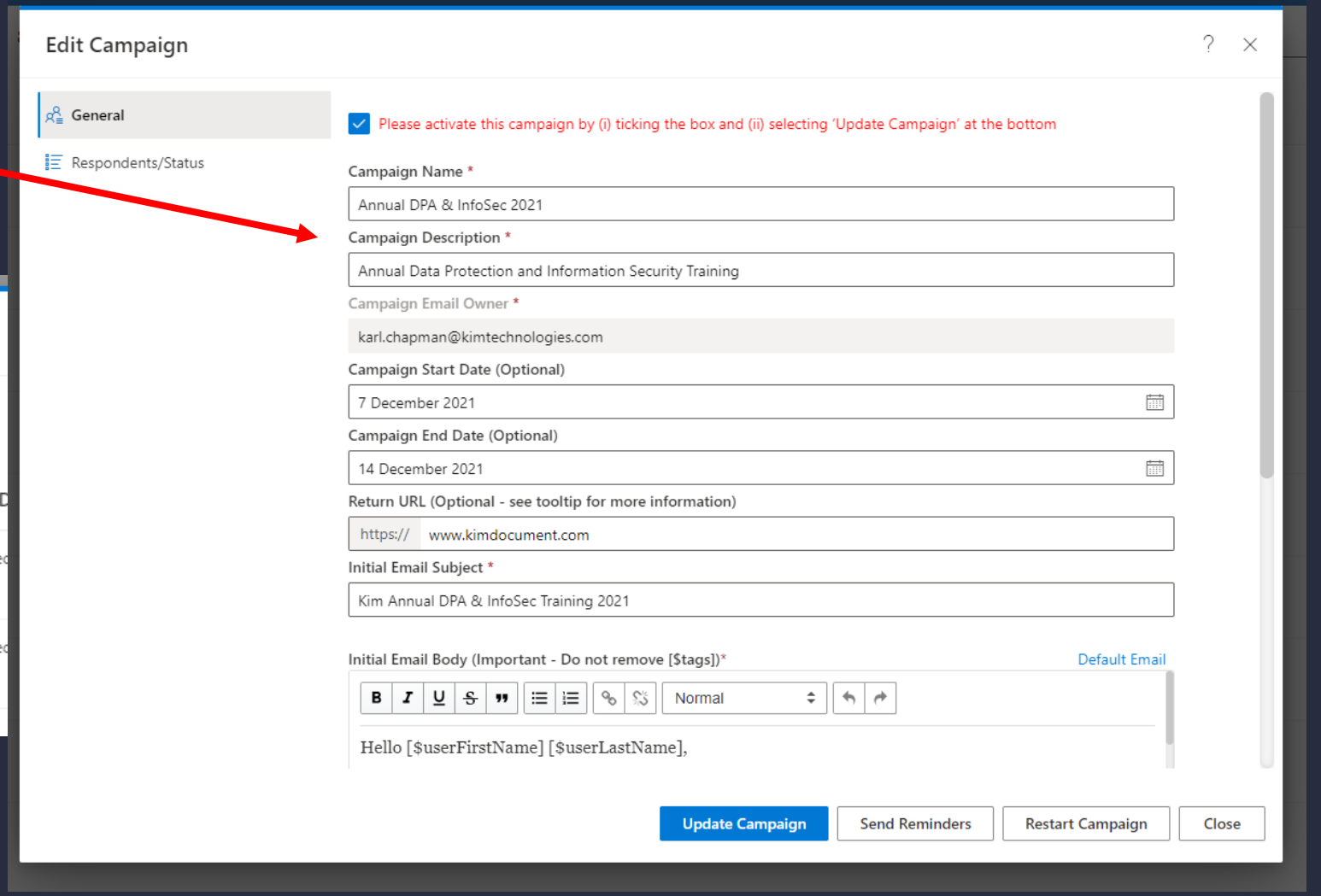


Campaign

Select '+ New Campaign'

Add campaign details





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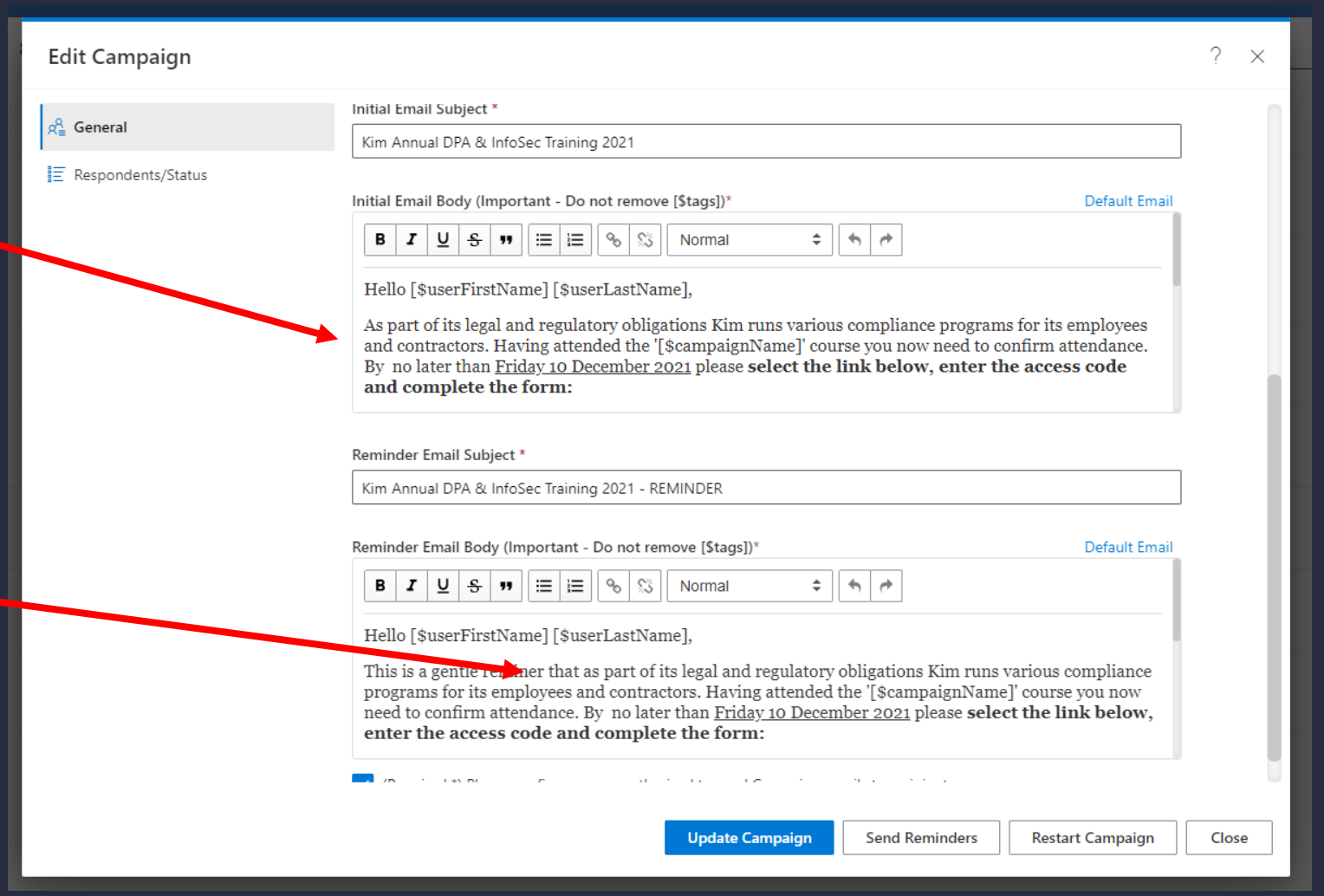
Campaign

Write the initial email that the User will receive (which will also include the link to the form that you have created)

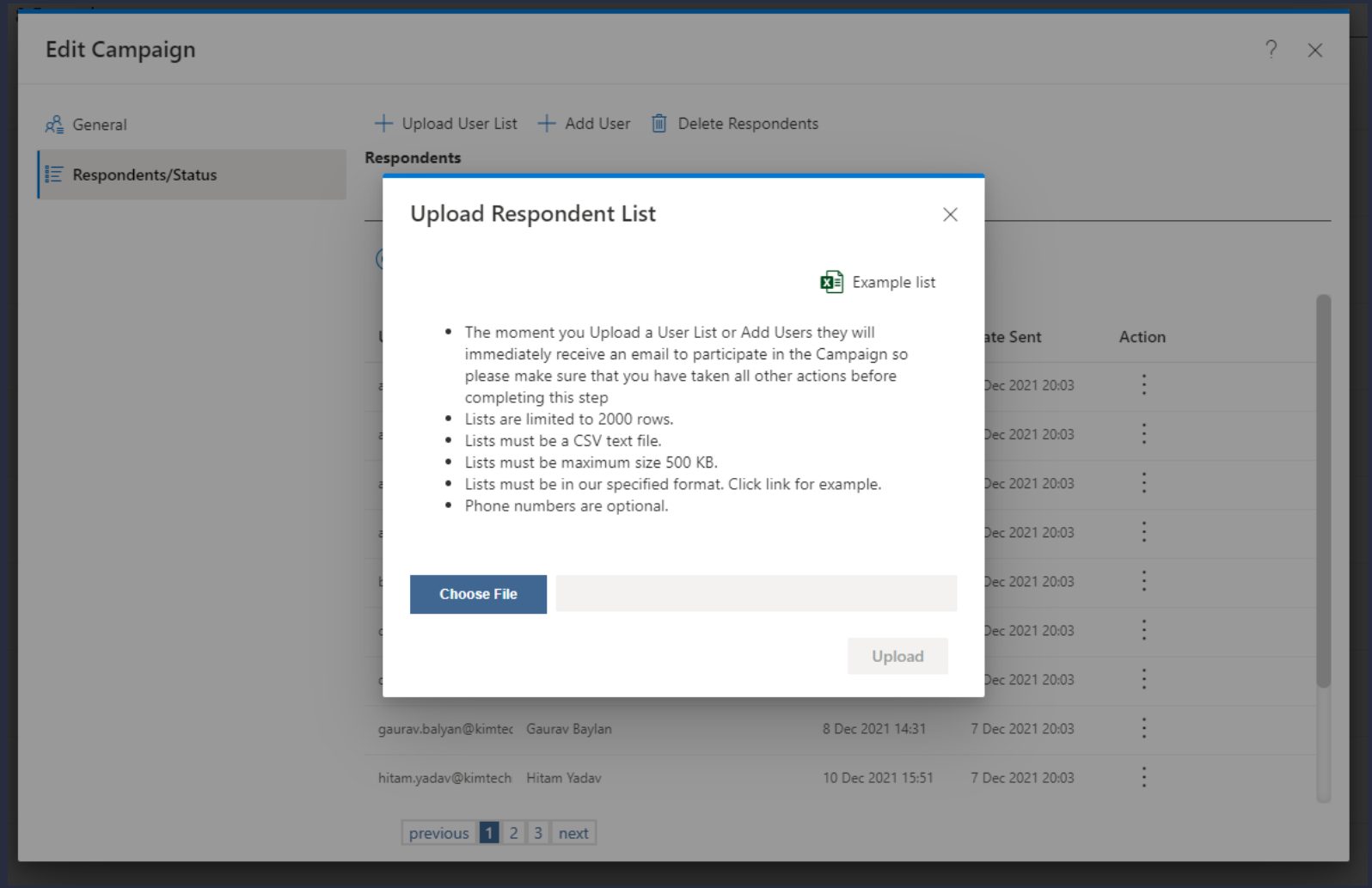
Also write the reminder email that can be sent when Users have not responded



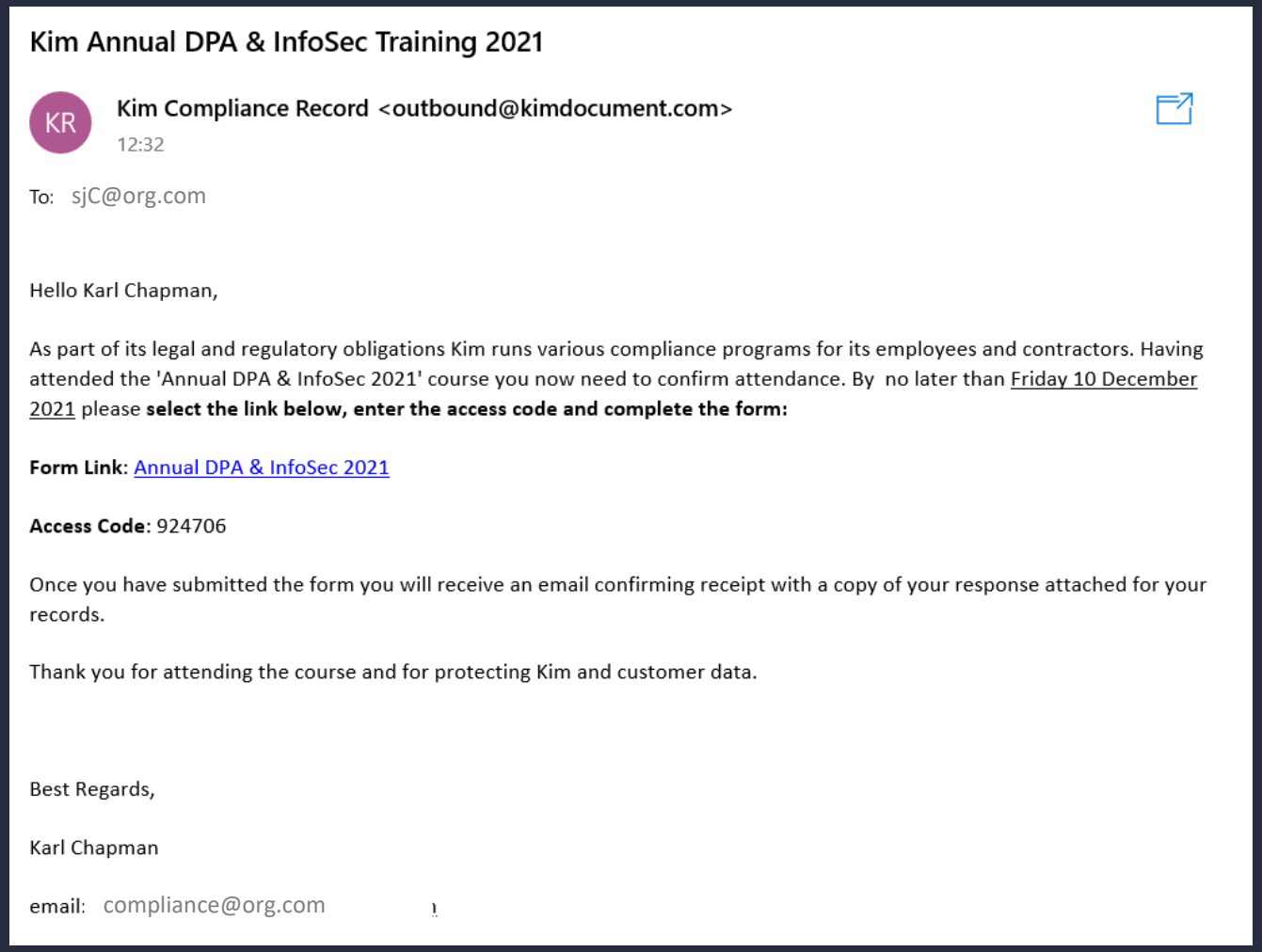
Campaign

Either upload a list of the recipients of the campaign email and link, or add recipients manually

Send Campaign!



Campaign



Kim Annual DPA & InfoSec Training 2021

KR

Kim Compliance Record <outbound@kimdocument.com>

12:32

To: sjC@org.com

Hello Karl Chapman,

As part of its legal and regulatory obligations Kim runs various compliance programs for its employees and contractors. Having attended the 'Annual DPA & InfoSec 2021' course you now need to confirm attendance. By no later than Friday 10 December 2021 please **select the link below, enter the access code and complete the form:**

Form Link: Annual DPA & InfoSec 2021

Access Code: 924706

Once you have submitted the form you will receive an email confirming receipt with a copy of your response attached for your records.

Thank you for attending the course and for protecting Kim and customer data.

Best Regards,

Karl Chapman

email: compliance@org.com

All recipients receive a personalised email (with the content you entered when you set up the campaign)

In the email there is a link with an individual verification code

Campaign

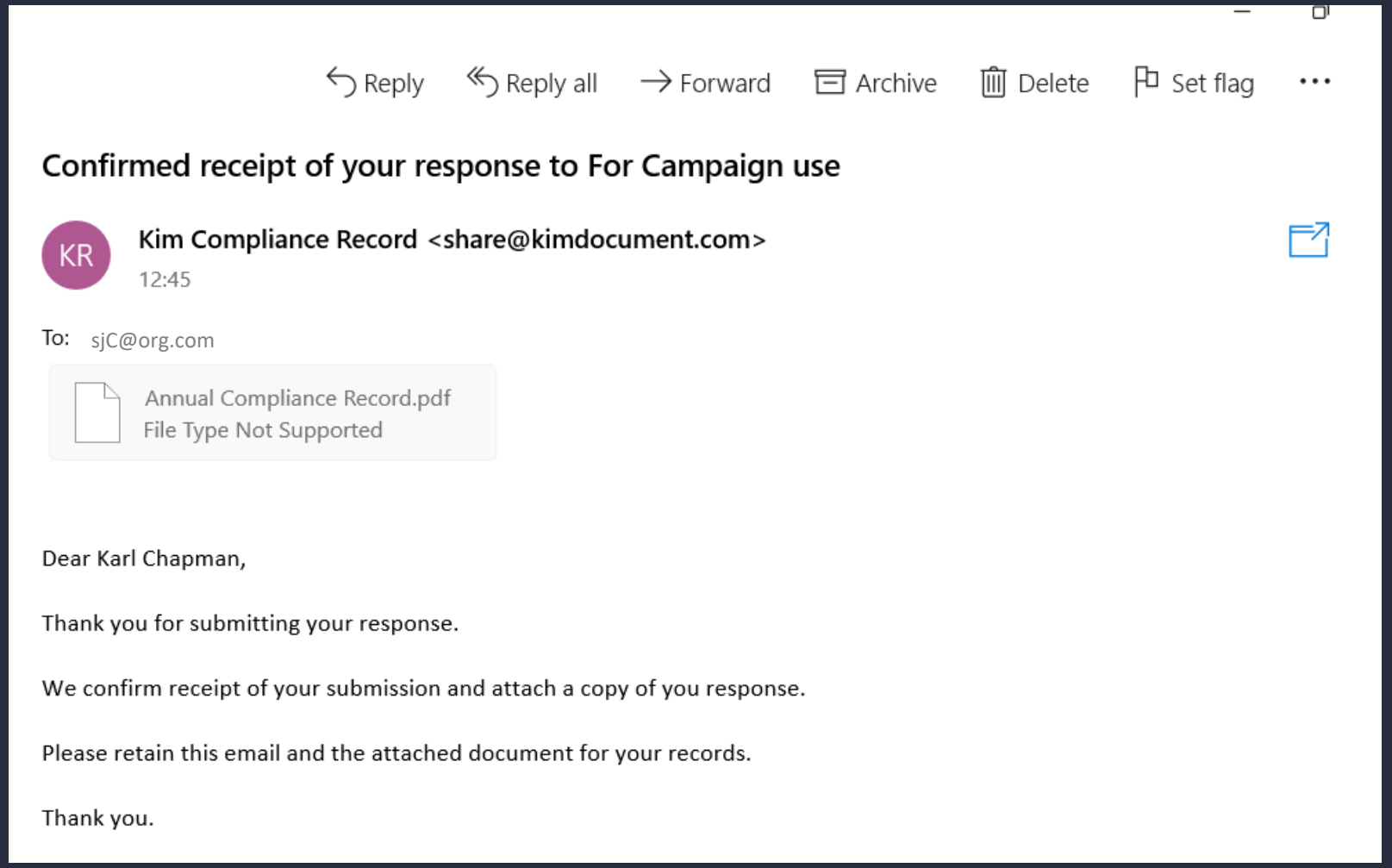
When a recipient clicks the link and enters their validation code they are presented with the compliance record form

The User completes the form and submits

Fields can be made mandatory (*) or optional

Campaign

Having submitted the form recipients receive an email confirming receipt with a pdf copy of their response for their records

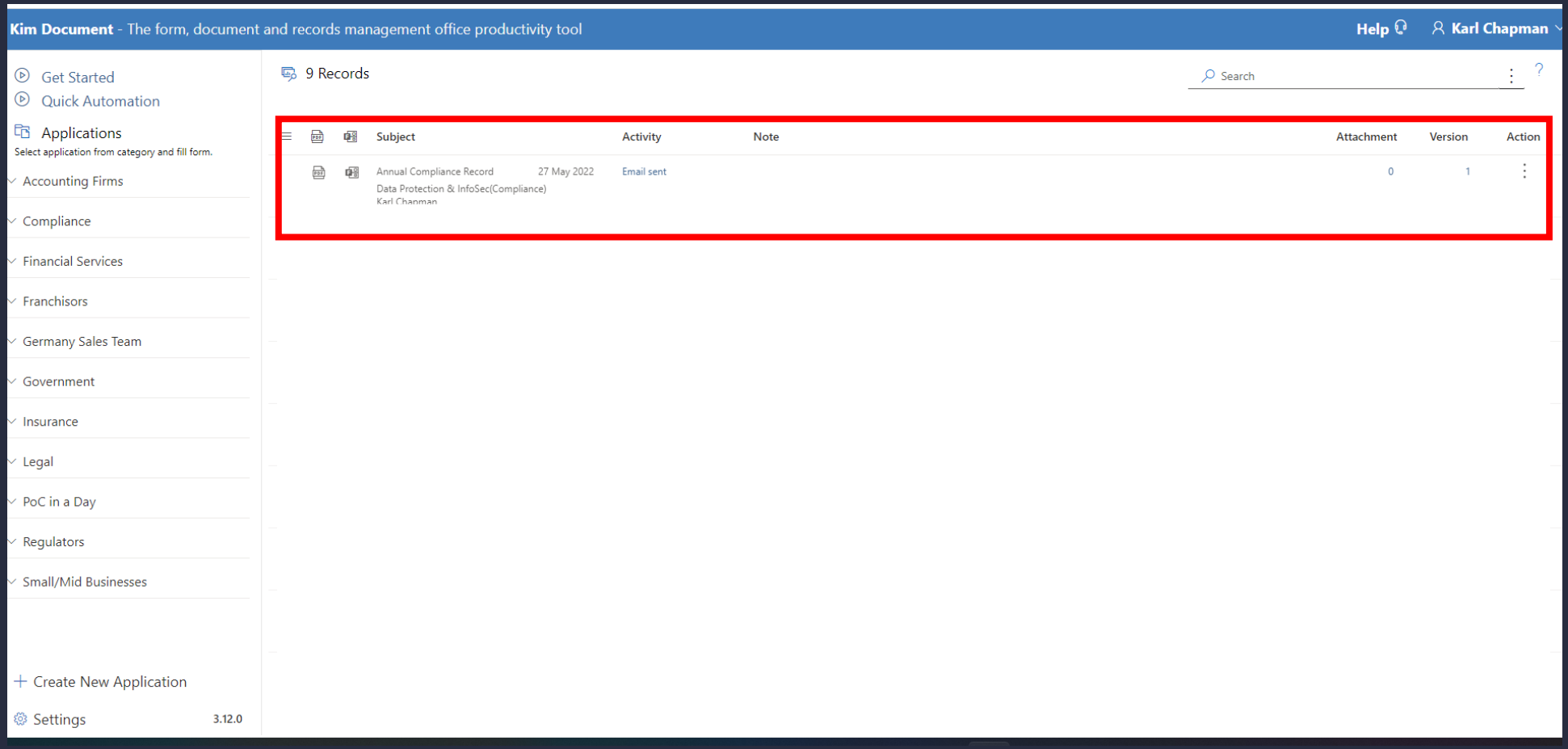


Campaign

Analyze Results

All recipient responses come back into Kim

Full version control is automatically managed



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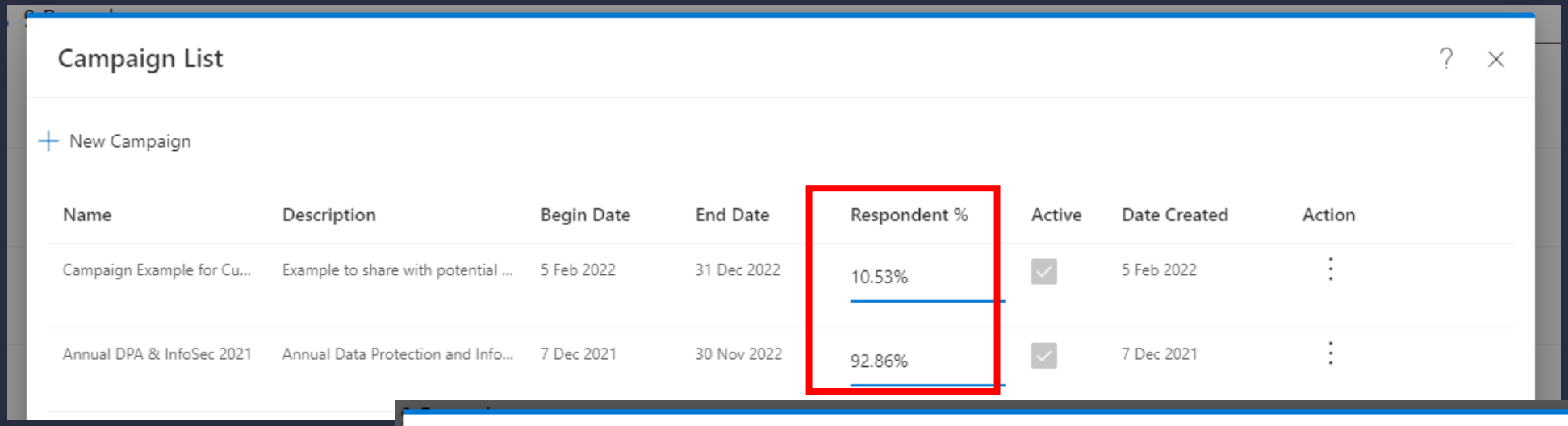
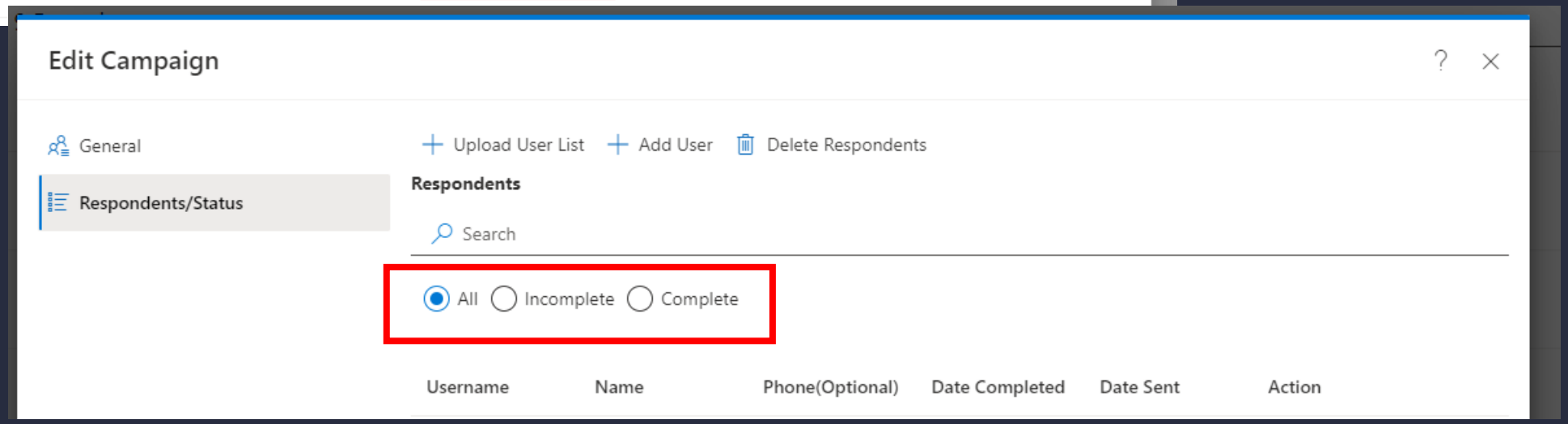
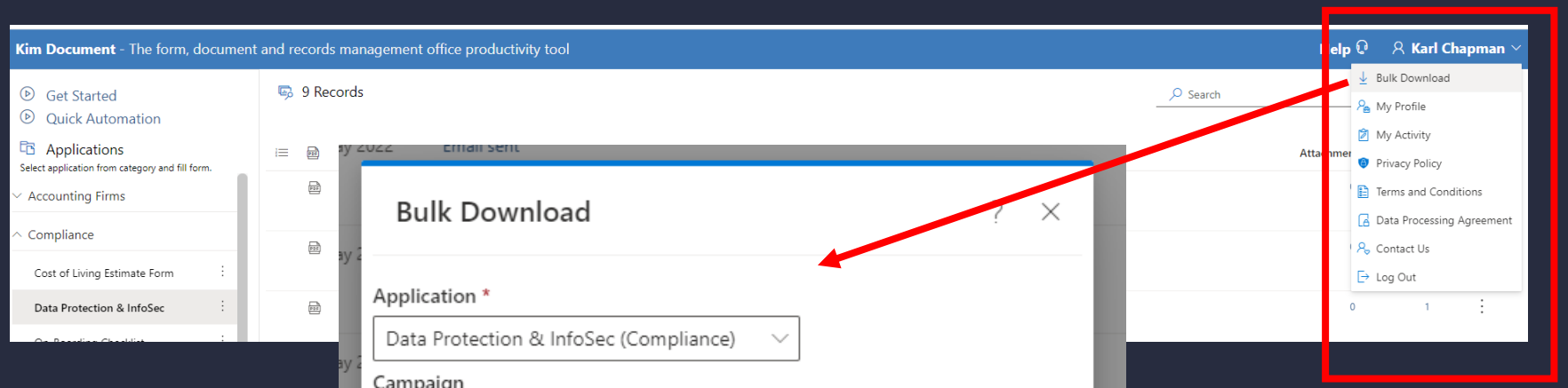
Campaign

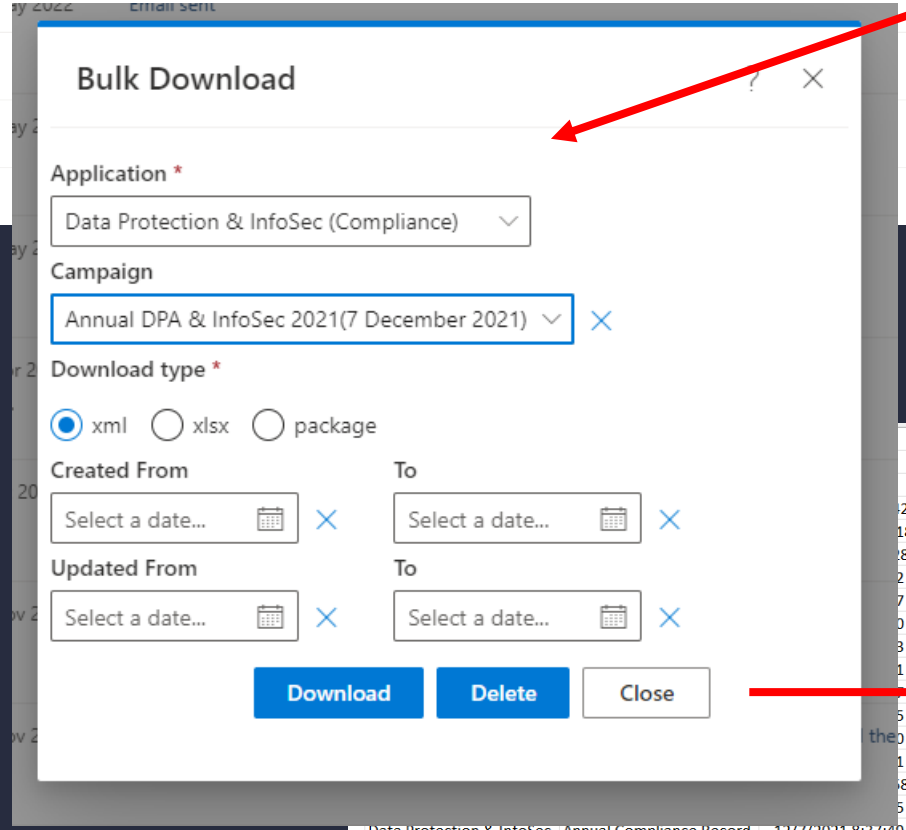


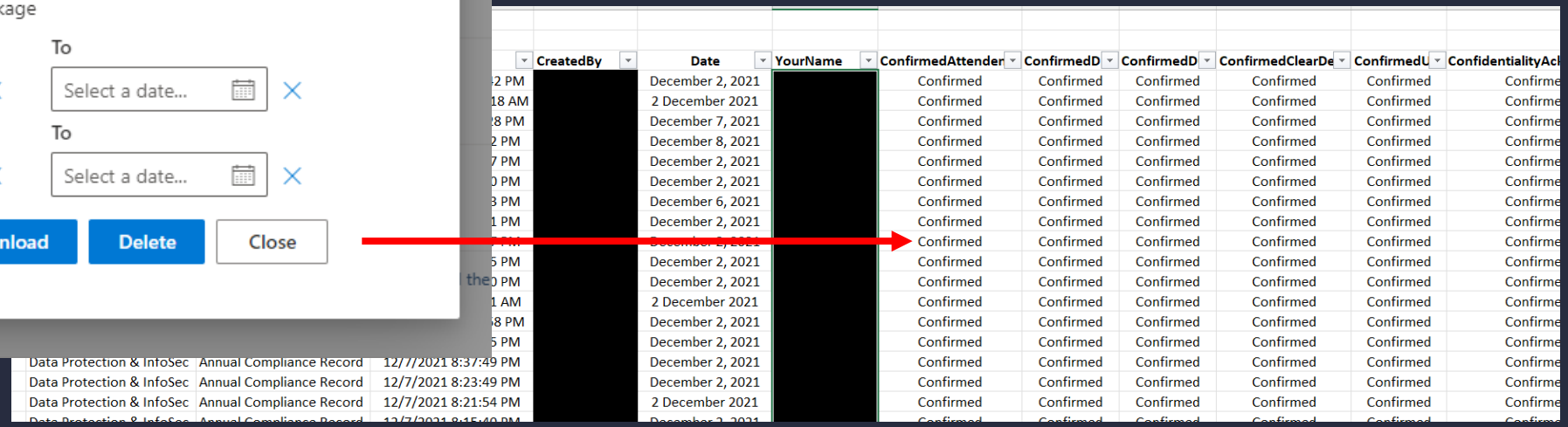


You can review overall response rates and track who has not responded and send out reminders

Campaign







You can bulk download and analyse all responses

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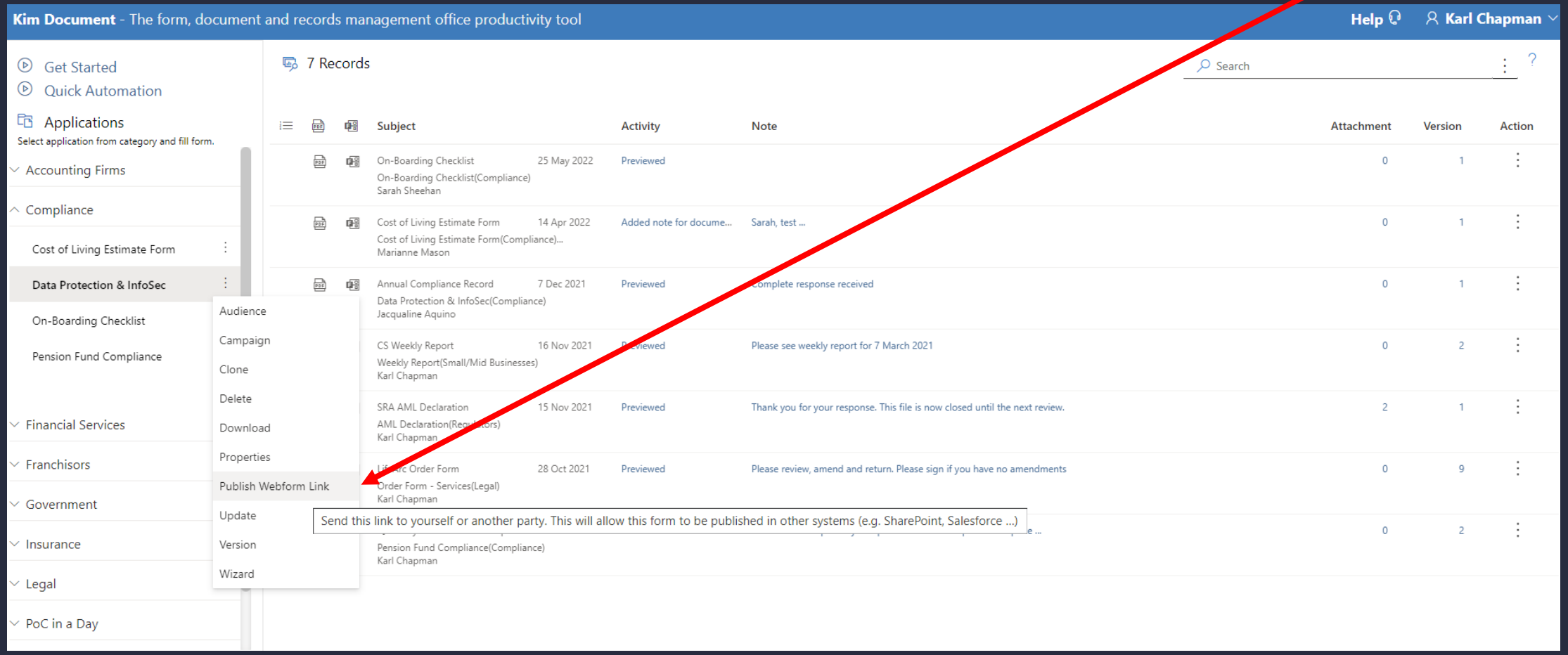
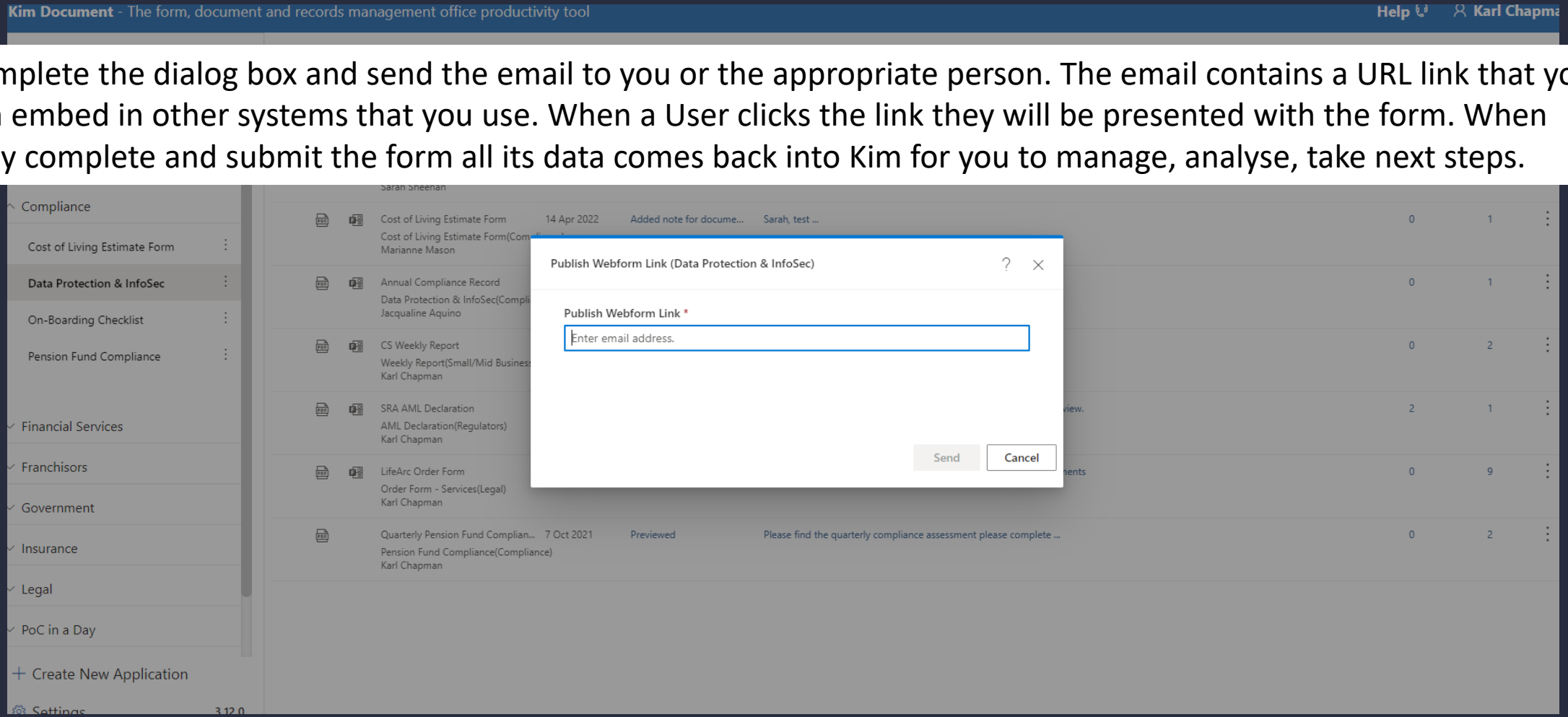
Publish Webform Link

Your Use case is that you want to make the form, checklist, compliance document (whatever document you have automated) available to all your colleagues via Salesforce, Sharepoint … etc. Simply select ‘Publish Webform Link’



Publish Webform Link

Complete the dialog box and send the email to you or the appropriate person. The email contains a URL link that you can embed in other systems that you use. When a User clicks the link they will be presented with the form. When they complete and submit the form all its data comes back into Kim for you to manage, analyse, take next steps.



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Welcome to Kim Document!

Document automation at the speed of light

Tag it

Upload it

Automate it

Activate it

Share it

Analyze it

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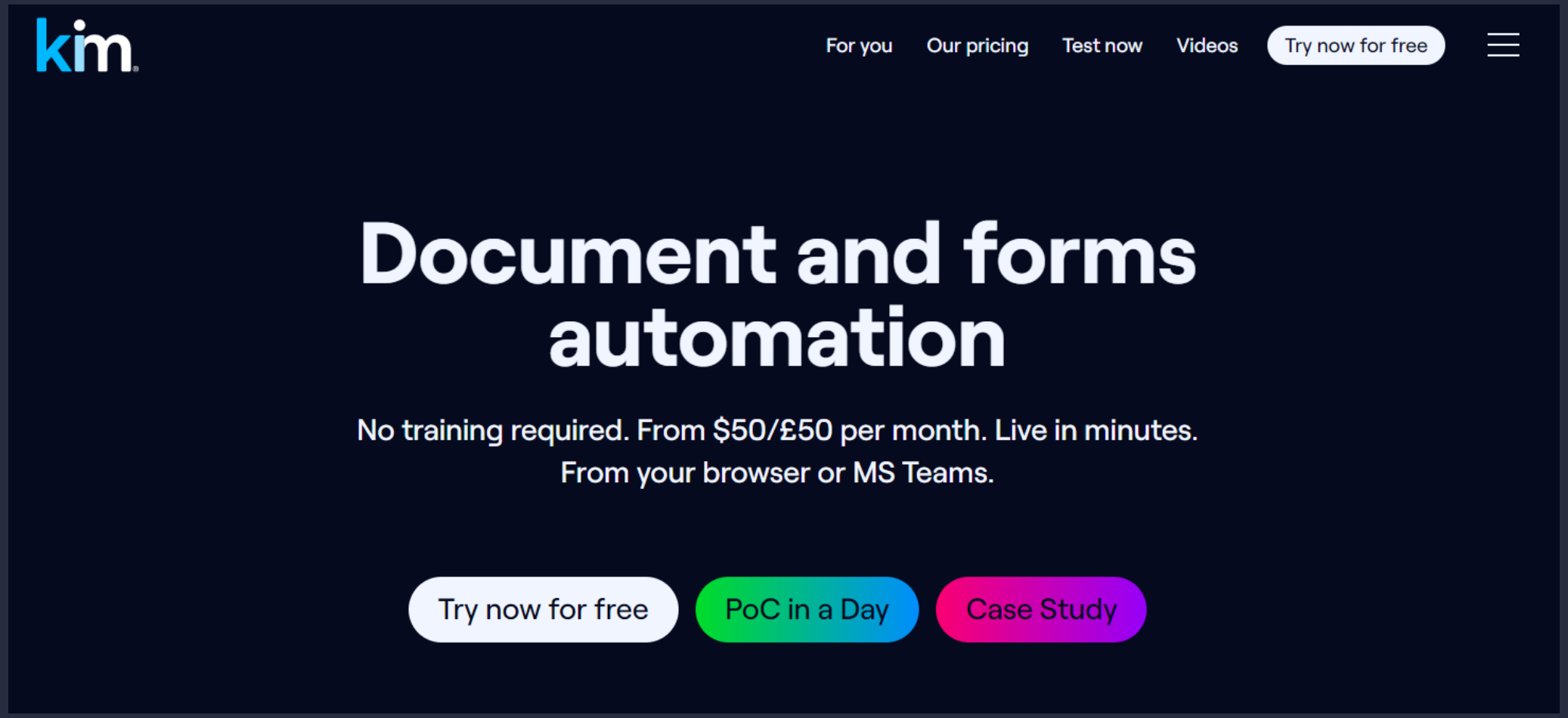

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