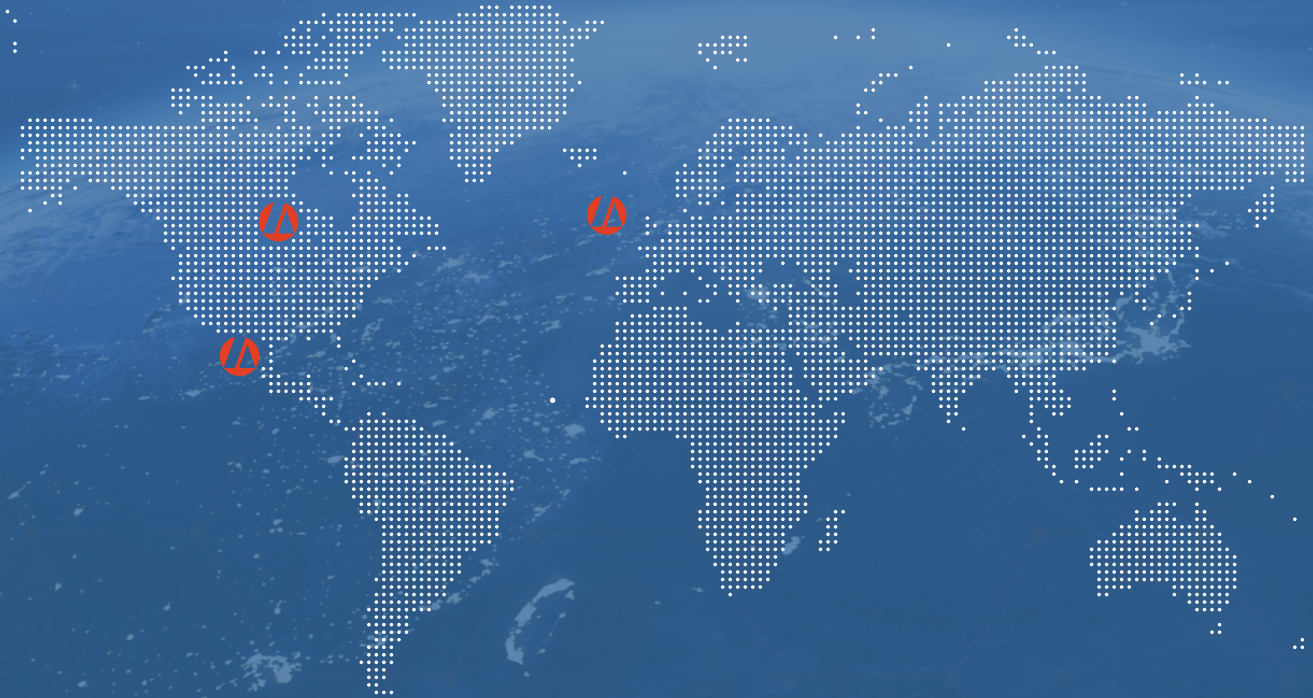




HOTdocs

LEGAL

HOTDOCS.COM



ABOUT HOTDOCS AND ABACUSNEXT

HotDocs pioneered document automation technology more than 30 years ago and is now the global market leader. We've spent decades fine-tuning our technology and today provide solutions to tens of thousands of law firms and legal professionals throughout the globe.

The company was acquired in 2017 by AbacusNext, the largest Technology-as-a-Service (TaaS) provider for professional services, creating the most compelling products and services portfolio in the industry.

AbacusNext is headquartered in San Diego, CA with offices and data centres located across the UK and Canada.



WHAT IS DOCUMENT AUTOMATION?

In the simplest terms, document automation (also known as document assembly) is technology that enables the transformation of frequently used documents or forms into dynamic templates. These templates can then be used to easily generate documents via intuitive and responsive interviews.

Create operational efficiencies and control your documents by removing manual processes including cutting and pasting, finding and replacing, and lengthy review processes.

HOW CAN WE IMPROVE THE PRODUCTION OF LEGAL DOCUMENTS?

Incorporating our leading document automation solution gives law firms and legal departments greater control over their document production approval processes. Automating the assembly of legal documents makes it possible to:



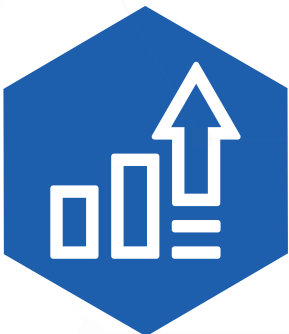
ENHANCE COMPLIANCE

- ✦ Adhere to approved business rules set by internal or industry authorities
- ✦ Enable template version control to ensure all users or systems that produce documents use the latest, most compliant version of your document template
- ✦ Promotes standardisation ensuring that all assembled documents comply with internal brand guidelines



INCREASE EFFICIENCY & IMPROVE CUSTOMER SERVICE

- ✦ Improve productivity by speeding up the document creation process by automating repetitive work
- ✦ Improve efficiency by reducing time spent by staff manually creating first drafts of standard legal documents
- ✦ Ensure faster turnaround times for approvals and document packages
- ✦ Integrate with leading practice management systems to streamline workflows



MITIGATE RISK, INCREASE QUALITY & REDUCE COSTS

- ✦ Eliminate human errors that can creep into manual processes while reducing wasted time and associated costs
- ✦ Protect against legal issues stemming from inaccurate, non-compliant content
- ✦ Ensure global standardisation by centralising all aspects of template creation
- ✦ Improve document quality

TYPES OF DOCUMENTS

HotDocs allows firms to automate the generation of legal documents - anything from standard correspondence to complex wills, trusts, and contracts. Almost any legal document can be drafted and assembled with HotDocs.

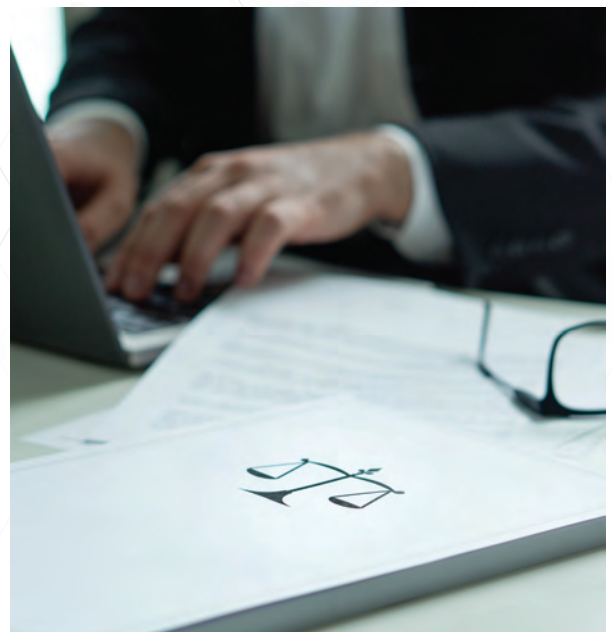


THE CONNECTED EXPERIENCE OF ENTERPRISE APIs

In addition to offering document automation out-of-the-box, powerful HotDocs APIs (application programming interfaces) facilitate integrations with other key line of business systems.

These integrations allow for the realisation of even greater value by allowing other systems to generate documents automatically, pull data into the document assembly process, or allow users to save documents into their preferred document management systems. Legal workflow technologies can significantly increase efficiency by streamlining client intake processes, with HotDocs assembling all the relevant documentation during their processes.

Enhanced APIs allow simple porting between on-premise and Abacus Private Cloud (APC) deployments of HotDocs.



HOW HOTDOCS HAS HELPED CURRENT USERS

**AN AVERAGE
FIRM CAN
CREATE
THOUSANDS OF
DOCUMENTS
WEEKLY**

**TIME SPENT
GENERATING
DOCUMENTS
REDUCED BY 94%**

**SAVE HUNDREDS
EACH TIME A
DOCUMENT IS
CREATED**

CASE STUDY



CMS CAMERON MCKENNA

CMS Cameron McKenna, a long standing HotDocs customer, uses the market leading document assembly technology across a number of key departments to vastly reduce the time spent in the production of a wide range of legal documents.

Before HotDocs was implemented, the firm wanted to improve client service and competitiveness by increasing speed and accuracy of document drafting, potentially increasing profitability by reducing the amount of time spent by fee earners in producing the first draft and enhancing the quality and consistency of documentation.

The solution was purchasing and deploying HotDocs in a variety of ways, for example, utilising it for complex agreements of over 150+ pages, suites of around 20 simpler documents and some highly specialised usages in the practice areas of Banking & International Finance, Real Estate, Corporate, Tax, Energy Projects, and Construction.

In May 2014, Scottish-based Dundas & Wilson and CMS Cameron McKenna completed a merger which necessitated an increase in HotDocs User licences, bringing the total number of people creating legal documents via intelligent HotDocs interviews to 1,750. Peter Cole, Document Development Manager for CMS Cameron McKenna, said: "Since we commenced use of HotDocs 14 years ago, we have transformed several hundred frequently used documents into dynamic templates, which users complete via an intelligent interview to produce an accurate first draft of the legal document, or set of documents, required. The value of document automation to the firm is appreciable and has been evidenced in a variety of ways including controlling costs alongside improvements in quality and service."

He continued: "Automating the document production process with HotDocs has also helped us to manage risk and create efficiencies in how we carry out our day to day business."

The HotDocs consultancy team have worked with CMS Cameron McKenna to provide a software update aimed at further improving the quality of the documentation produced. HotDocs was tailored to complement CMS Cameron McKenna's Microsoft Office upgrade, providing a host of benefits, such as greater document stability. This solution also provides a range of features and benefits including supporting the DOCX format and the availability of parameter passing and local variables within computations – meaning that automating a document for output in multiple languages is now more dynamic and much easier.

HOTDOCS AUTHOR

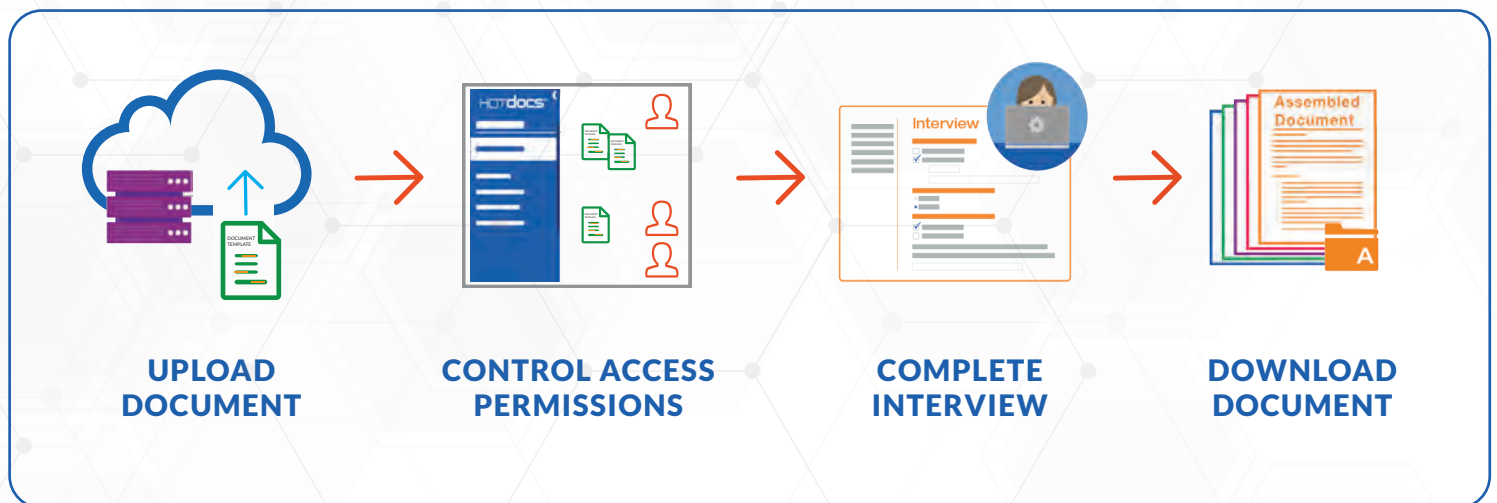
HotDocs Author is our latest product that gives you the ability to transform documents into powerful templates. HotDocs templates save time, money and yield better quality documents than the outdated cut-and-paste/search-and-replace methods.

For text-based documents, HotDocs Author works inside your word processor. HotDocs Author utilises an easy to use select-and-click approach to inserting variables and embedding business logic into logic documents.



HOTDOCS ADVANCE

HotDocs Advance is an enterprise-grade, browser-based document automation solution that makes it easier than ever to implement HotDocs, regardless of an organisation's size. HotDocs Advance can be deployed on Cloud, Abacus Private Cloud, or On-Premise.



HOTDOCS ADVANCE FEATURES

ADMINISTRATIVE EXPERIENCE

Administrative tools

Powerful tools for administering IT, integrations, users, publishing, templates, and file management.

Cloud, Abacus Private Cloud and On-Premise solutions

Flexible options enable browser-based document generation both online and offline.

Integrations

Robust, secure, Service Oriented Architecture and industry-standard APIs enable simplified integrations with business applications such as BPM, CRM, DMS, ECM, database, and e-signature technologies

Template and file management

APIs support enhanced management of templates, work items, answer data, document generation, and completed documents. File repository available in cloud, Abacus Private Cloud, or on-premise.

Seamless integration between Author and Advance

Identical behaviour, functionality, and support for both desktop and browser-based interviews.

User management

Ability to efficiently manage end-users, groups, and permissions via built in user system and Active Directory.

Security

Cloud API security based on industry standards.

Multi-tenant support

Easily deploy HotDocs via multi-tenanted solutions or partner infrastructure.

Scalability

Flexible, proven, and scalable architecture that meets the needs of any organisation – regardless of size.

END-USER EXPERIENCE

Browser-based template interviews

Supports document generation on a variety of devices (PC, MAC, tablets).

Work items

End-users can more efficiently manage completed documents and answer files associated with each of their clients.

Full API suite

Enhanced APIs provide increased options for viewing, creating, and editing work items, documents, and data.

High performance

Users can expect only the best performance with the platform optimisations.

TEMPLATE AUTHORIZING EXPERIENCE

Simple, intuitive template creation

New authoring interface design makes it easier to handle even the most complex documents or document packages. Editing tools are easier to discover and learn. Field editor wizard guides template designers through each step of the authoring process.

Collaborative template development

Multiple template authors can easily coordinate their template design efforts.

Automatic error alerts

Template and scripting error alerts are displayed immediately during the template creation process to help authors identify mistakes prior to testing or publishing.

Powerful, local test assembly

Template functionality testing is available without the need for server upload or internet connectivity. Local tests conducted by the template author utilise the same interview code as those assembly sessions conducted in Advance. PDF post-assembly tests operate in a similar fashion. This functionality provides for more accurate interview testing.

Condensed field view

Hide HotDocs field text in Microsoft Word templates for a simplified template overview.

File conflict analysis

Files in the template library are continuously analysed in the background during template development to help identify conflicts between templates and files.

Simplified publishing and performance

The streamlined uploading and publishing process required to package a template is done automatically in the background providing for a faster publishing process. HotDocs Author is used to directly upload and manage published templates in Advance.

Increased language support

Documents and interviews support nearly any language or localisation requirement.



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