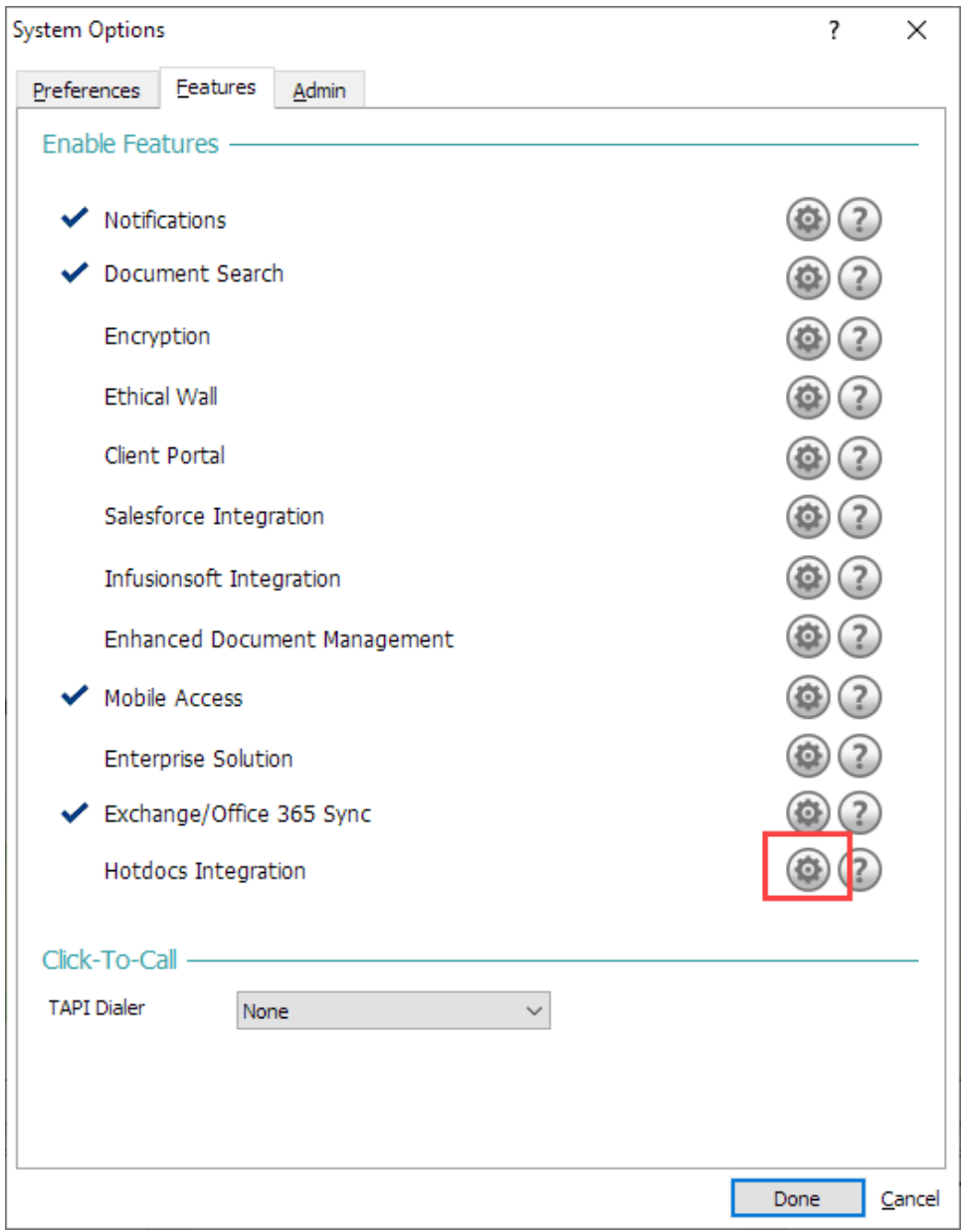


# HotDocs Integration Setup

HotDocs integration requires a 64-bit operating system.

1. Ensure that the HotDocs Integration practice pack is purchased and registered.
2. Select **File > Setup > System Options**.
3. The **System Options** window opens. Select the **Features** tab.
4. Select the **Hotdocs Integration** setup button.



5. The **Hotdocs Integration Setup** window appears. Do the following:

- a. Check **Enable Hotdocs Integration**.
- b. Enter the email address and password for initial setup. The password must be 10 characters long and have at least one uppercase letter, one lowercase letter, and no more than 2 identical characters in a row. The initial setup email address and password are used for **HotDocs** tasks, like logging in to **HotDocs** and uploading templates. Record them for later use.
- c. Enter the first and last name for initial setup.
- d. **Principal Name** is auto-filled and cannot be changed.
- e. Enter the principal password. This password must be 12 characters long and have at least one uppercase letter, one lowercase letter, one number, and one special character. The same principal password must be provided if **HotDocs Integration** needs to be set up again (e.g., in a second database) in the future. Record the password for later use.
- f. For **Moniker** enter a nickname for your **HotDocs** provision. A common nickname might be your lawfirm name, for example, smithandsmith. The moniker is used in the URL to access the tenancy. It must be 3 to 32 characters long and can only contain lowercase alphanumeric characters and dashes. Spaces are not allowed.
- g. Click **Done**.

Hotdocs Integration Setup

The information provided here will be used to setup the Hotdocs Provisioning required to be able run form generation using Hotdocs templates from within Abacus Law.

Enable Hotdocs Integration for 22340446

Email address for initial setup: shaworth@abacusnext.com

Password for initial setup: ●●●●●●●●

First name for initial setup: Susan

Last name for initial setup: Haworth

Principal Name: al22340446\_sp

Principal Password: ●●●●●●●●

Moniker: susanhaworth

Done Cancel

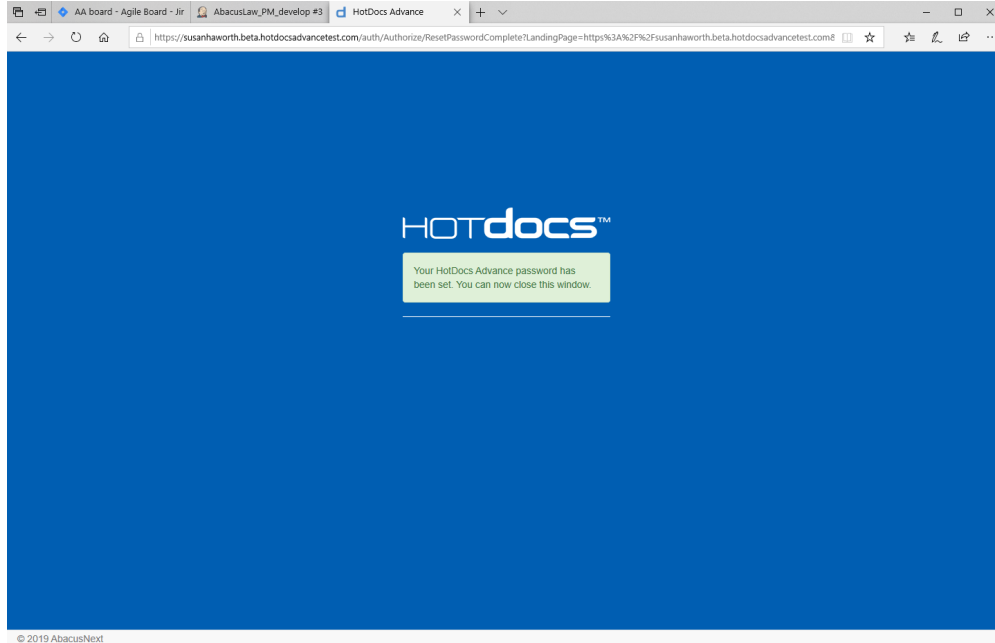
6. Setup begins.

The screenshot shows a dialog box titled "Hotdocs Integration Setup". The text inside reads: "The information provided here will be used to setup the Hotdocs Provisioning required to be able run form generation using Hotdocs templates from within Abacus Law." Below this, there is a checked checkbox labeled "Enable Hotdocs Integration for 22340446". A large white box with the text "Contacting cloud service..." is overlaid on the "Email address" and "Password" fields. Below the overlay, the "First name" field is empty. The "Last name for initial setup:" field contains "Haworth". The "Principal Name:" field contains "al22340446\_sp". The "Principal Password:" field is filled with 12 black dots. The "Moniker:" field contains "susanhaworth". At the bottom right, there are "Done" and "Cancel" buttons.

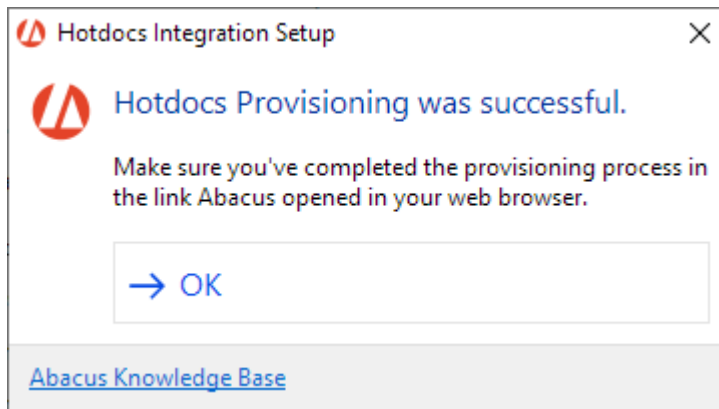
7. The Internet browser opens. Enter the initial setup password twice in the boxes provided and click **Submit**.

The screenshot shows a web browser window with the URL "https://susanhaworth.beta.hotdocsadvancetest.com/auth/Authorize/ResetPassword?verificationToken=SLQNZETMSNRWBM468&landingPage=http%3a%2f%2fsusanhaworth...". The page has a blue background and the "HOTdocs™" logo. Below the logo, it says "Enter a new password for your account". There are two password input fields, each containing 12 black dots. A "Submit" button is located below the second field. At the bottom left, there is a copyright notice: "© 2019 AbacusNext".

8. When the setup is complete a notification message appears and the browser can be closed.



9. A notification message in AbacusLaw also shows you that **HotDocs** is set up. Click **OK** to close the window.



10. Confirm that once **HotDocs** is set up, the **HotDocs** button appears in the main toolbar.

