

How to Sell HotDocs Advance with Integration to AbacusLaw

We'll start off with the rules:

- 1) The number of HD Integration users must meet or exceed the number of AbacusLaw users, and all subscriptions must start with the 5 pack bundle just like HD Advance.
 - For example a 3 user AbacusLaw Client would be required to purchase the **HD Advance Int Starter Pack** including up to 5 users.
 - For Example a 25 user AbacusLaw client would be required to purchase 1 x **HD Advance Int Starter Pack** and 20 x **HD Advance Int License** = Total of 25 Users. They may not purchase less than 25 HD Int Licenses!
- 2) If a client already has HotDocs, you will need to remove the old licenses with an addendum matching their current billing price at negative quantity, replacing them with the proper number of HD Advance Integration Users. It may also be done using an original contract to re-tier them into the new configuration and superseding the old contract.
- 3) HD Classic is not currently an option for AL integration.

FYI: You can't manually add bundles to an existing quote, you must create a new quote using the updated templates in Quosal. The search will not find Bundles.

To Quote via Addendum:

- 1) Start an addendum quote as you normally would from the templates in Quosal. Verify the number of AbacusLaw users the client has in NetSuite and any HD Users.
- 2) On the 3rd tab labeled HotDocs, select the bundle "**HD Advance Int Starter Pack**" – all new orders must start with this SKU (Or APC Variant in APC).
- 3) If the client has more than 5 AbacusLaw users, add additional "**HD Advance Int License**" SKU's as needed to equal the total number of AbacusLaw Users.
- 4) Remove by negative Quantity (positive price, matching the current subscription cost) any HotDocs users the client currently has.


To Quote via Original Contract (coterminous or new term):

- 1) Start an Original Contract as you normally would for a re-tier, renewal, or new client - selecting coterminous for an existing term, or a term of 12,24, 36, or 60 months for a new client or renewal.
- 2) Add all software users, integrations (other than HD), Rules, PAL's, and or Forms the client needs. Add APX, and any OP MS Licenses, etc. This will supersede any previous items and the client will only receive what you put on this contract.
- 3) Under the HotDocs tab, add the "**HD Advance Int Starter Pack**" covering up to 5 users, add any additional users with "**HD Advance Int License**" to equal the **SAME** number of users when over 5.

Finding the items in Quosal:

1) AbacusLaw		2) Additional Software & Services		3) HotDocs		4) Activation Fee		5) Professional Services		6) Additional Terms & Conditions		+	
Thumbnail	Manufacturer Part Number	Product Description		Quantity	QuoteItemPrice	Recurring Amount		Exten					
	HD Advance Int Starter Pack	HotDocs Advance integration user pack for AbacusLaw. Provides up to		0.00	\$0.00	\$109.00							
	HD Advance Int License	HotDocs integration user for AbacusLaw. Provides 1 HotDocs Advance		0.00	\$0.00	\$35.00							
	HOTDOCS CLASSIC DESKTOP - DEV USEI	Desktop document automation software which integrates with Microsof		0.00	\$0.00	\$70.00							
	HOTDOCS CLASSIC DESKTOP - USER	Desktop document automation software which integrates with Microsof		0.00	\$0.00	\$70.00							
	HD Advance License-5	HD Advance Starter Pack, Includes up to 5 HD Advance licenses and Ad		0.00	\$0.00	\$125.00							
	HD Advance License	HotDoc Subscription User License per user, configurable permissions. N		0.00	\$0.00	\$40.00							

Here is what a 6 user Abacus Law Quote will look like with no additional add-ons:



4850 Eastgate Mall
San Diego, CA 92121
<https://www.abacusnext.com>
(800) 726-3339

AbacusLaw

Description	Recurring	Qty	Ext. Recurring
ABACUSLAW BDL USER AbacusLaw User (On-Prem), AL User Includes DB Secure, Document Management, Accounting, Mobile App, Client Portal, APX, Integrations, and 1 PAK/PAL/Rule.	\$69.99	6	\$419.94
APX Abacus Payment Exchange (APX) integration	\$0.00	1	\$0.00
Monthly Subtotal:			\$419.94

HotDocs

Description	Recurring	Qty	Ext. Recurring
HD Advance Int Starter Pack HotDocs Advance integration user pack for AbacusLaw. Provides up to 5 HotDocs Advance Users with AL integration.	\$109.00	1	\$109.00
HD Advance Int License HotDocs integration user for AbacusLaw. Provides 1 HotDocs Advance user with integration.	\$35.00	1	\$35.00
Monthly Subtotal:			\$144.00

Disclosure: We may quote this configuration today but are still working on the backend processing. As a result, there may be a delay in processing orders until they can be fulfilled.