



Turning your documents into Web Applications in minutes

June 2022

Available from your browser or MS Teams

Web applications in minutes



Whatever letter, form, checklist, compliance record or contract you automate in Kim you can, in minutes, and with no training, turn them into web applications (web forms) for easy use by colleagues, customers or any third party

[For you](#) [Our pricing](#) [Test now](#) [Videos](#) [Try now for free](#)



Document and forms automation

No training required. From \$50/£50 per month. Live in minutes.
From your browser or MS Teams.

[Try now for free](#)

[PoC in a Day](#)

[Case Study](#)

[Overview](#)

Web applications in minutes



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

Help Karl Chapman

7 Records

Search

Subject	Activity	Note	Attachment	Version	Action
On-Boarding Checklist On-Boarding Checklist(Compliance) Sarah Sheehan	25 May 2022 Previewed		0	1	
Cost of Living Estimate Form Cost of Living Estimate Form(Compliance)... Marianne Mason	14 Apr 2022 Added note for docume...	Sarah, test ...			
Annual Compliance Record Data Protection & InfoSec(Compliance) Jacqueline Aquino	7 Dec 2021 Previewed	Complete			
CS Weekly Report Weekly Report(Small/Mid Businesses) Karl Chapman	16 Nov 2021 Previewed	Pl			
SRA AML Declaration AML Declaration(Regulators) Karl Chapman	15 Nov 2021 Previewed	T			
LifeArc Order Form Order Form - Services(Legal) Karl Chapman	28 Oct 2021 Previewed	Pl			
Quarterly Pension Fund Complian... Pension Fund Compliance(Compliance) Karl Chapman	7 Oct 2021 Previewed	Please fin			

+ Create New Application

Settings 3.12.0

Web applications make it easy for Users to:

- (i) create documents or provide information; or
- (ii) track responses and analyse data; and
- (iii) access the web forms from locations that they typically use/visit every day (email, SharePoint, Teams, website ...)

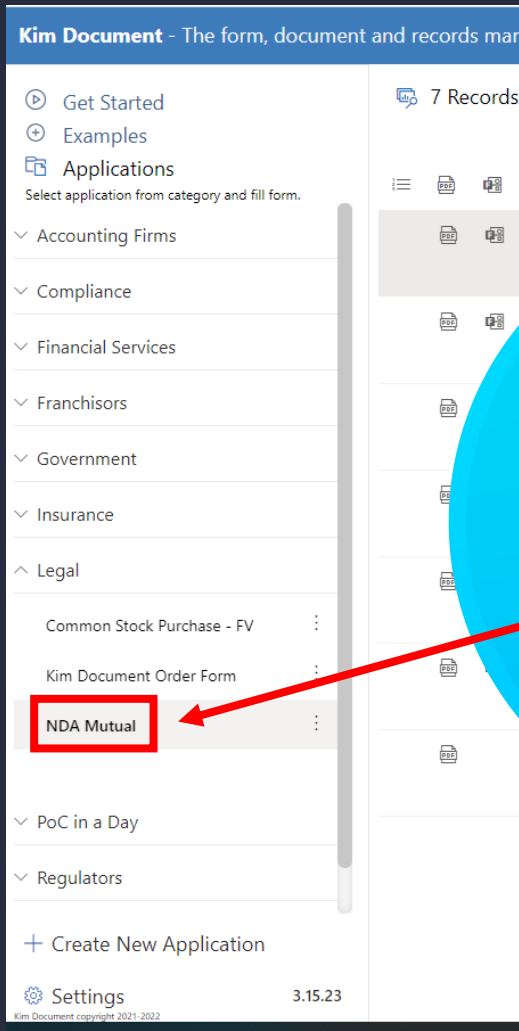
Making User lives easier



Having used Kim to automate your documents you can make web applications in four ways:

1. **sharing** the document enabling editing and version control;
2. sending a **web link** so that a recipient simply completes the form and submits it;
3. creating a **campaign** which can be sent to up to 2000 recipients at the same time; and
4. creating a **webform link** (URL) that can be embedded on your internal systems or publicly facing websites for Users to access and complete.

Web applications - Share



In my organization I have been given access to some letters, forms, checklists, compliance records, contracts (NOTE: you control User rights and access through enabling documents by Category and Audience).

I select 'NDA Mutual' from my list of options in my left hand menu. The web form appears and in three steps I am ready to Share internally or externally (see next slide) ...

Web applications - Share



NDA Mutual 1. Complete the web form

Description ABC Pharma Mutual NDA

MUTUAL NDA - ENGLAND & WALES GOVERNING LAW

1. OUR DETAILS

Our Contracting Entity Company Name* Country Of Registration* Company Number*

Kim Technologies Limited England England 09687973

Registered Office*

One Central Boulevard Blythe Valley Park Solihull West Midlands B90 8BG

Kim Signatory* Kim Signature Date*

Karl Chapman CEO June 10, 2022

2. COUNTERPARTY DETAILS

Counterparty Name* Counterparty Address*

ABC Pharma Inc ABC House, Cambridge

Document Preview

2. Preview the document that is generated

Confidentiality Agreement Mutual

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

- Kim Technologies Limited incorporated and registered in England with company number England 09687973 whose registered office is at One Central Boulevard Blythe Valley Park Solihull West Midlands B90 8BG; and
- ABC Pharma Inc whose registered office is at ABC House, Cambridge, England, Europe

(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.

- 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);
- was available to the Recipient on a non-confidential basis prior to disclosure by the Disclosing Party;
- 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

Attachment	Version	Action
	0	Delete
	0	Download
	0	Manage
	2	Note
	2	Preview
	0	Send Mail
	0	Send Webform Update Link
	0	Share
	0	Sign
		Subform
		Update Webform
		Executed

3. Share as required with the recipient(s) who can now review, amend, sign ...

Web applications - Sending a web link



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

Help Karl Chapman

7 Records

Subject	Activity	Note	Attachment	Version	Action	
ABC Pharma Mutual NDA NDA Mutual(Legal) Karl Chapman	10 Jun 2022	Added note for docume...	Sarah, please review and amend or simply sign. Thank you, Karl.	0	1	Activity Attachment Checkout Copy Delete Download Manage Note Preview Send Mail Send Webform Update Link Share Sign Subform Update Webform Executed
On-Boarding Checklist On-Boarding Checklist(Compliance)	25 May 2022	Downloaded Document		0		
Quarterly Pension Fund Complian... Pension Fund Compliance(Compliance) Karl Chapman	7 Oct 2021	Previewed	Please find the quarterly compliance assessment please complete ...	0		

Having created a document, rather than 'Share' you can use the **Send Webform Update Link** option to send a link to a recipient so that they just receive the web form to update and submit whether the web form is a letter, form, checklist, compliance record, contract ...(see next slide)

Web applications - Sending a web link



Send Webform Update Link (ABC Pharma Mutual NDA)

Enter Recipient Email Address to Send Link *

1. Select 'Send Webform Update Link', enter email and Send

NDA Mutual (ABC Pharma Mutual NDA)

MUTUAL NDA - ENGLAND & WALES GOVERNING LAW

1. OUR DETAILS

Our Contracting Entity Company Name*	Country Of Registration*	Company Number*
Kim Technologies Limited	England	England 09687973

Registered Office*

One Central Boulevard Blythe Valley Park Solihull West Midlands B90 8BG

Kim Signatory*	Kim Signature Date*
Karl Chapman CEO	10 June 2022

2. COUNTERPARTY DETAILS

Counterparty Name*	Counterparty Address*
ABC Pharma Inc	ABC House, Cambridge, England, Europe

Submit Cancel

3. Web form appears, recipient completes and submits

7 Oct 2

Reply Reply all Forward Arc

'ABC Pharma Mutual NDA' Link

Kim NDA <share@kimdocument.com>
15:33

To: karlchapmanassociates@outlook.com

This link is being sent to you from Karl Chapman (karl.chapman@kimtechnologies.com). Select [\('ABC Pharma Mutual NDA'\)](#) to review and edit information.

2. Recipient receives email and clicks link

Web applications - Sending a web link



Confirmed receipt of



share@kimdocu

15:36

4. Recipient receives confirmation email with copy of response

To: karlchapmanassociates@c



ABC Pharma Mutual NDA.pdf

Dear Karl Chapman (karl.chapman@kimtechnologies.com),

Thank you for submitting your response.

We confirm receipt of your submission and attach a copy of your

Please retain this email and the attached document for your records.

Thank you.

Management office productivity tool

Help Karl Chapman

7 Records

Subject	Activity	Note	Attachment	Version	Action
ABC Pharma Mutual NDA Mutual(Legal) Karl Chapman	10 Jun 2022 Email sent	Sarah, please review and amend or simply sign. Thank you, Karl.	0	2	
On-Boarding Checklist On-Boarding Checklist(Compliance)	25 May 2022 Downloaded Document		0	1	
			0	1	
			0	2	
			2	1	
			0	9	
			0	2	

5. Recipient response automatically tracked back into Kim and version control initiated – now version 2

Web applications - Campaign



Rather than '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'

The screenshot displays the 'Kim Document' interface, titled 'The form, document and records management office productivity tool'. The top navigation bar includes 'Help' and the user name 'Karl Chapman'. The left sidebar shows a tree view of applications, with 'Data Protection & InfoSec' selected. A context menu is open over this application, listing options: Audience, Campaign, Clone, Delete, Download, Properties, Publish Webform Link, Update, Version, and Wizard. A red arrow points to the 'Campaign' option. The main area shows a table of 8 records with columns for Subject, Activity, Note, Attachment, Version, and Action.

Subject	Activity	Note	Attachment	Version	Action	
Mutual NDA NDA Mutual(Legal) Karl Chapman	25 May 2022	Added note for document...	Sian, please review ...	0	1	⋮
On-Boarding Checklist On-Boarding Checklist(Compliance) Sarah Sheehan	25 May 2022	Previewed		0	1	⋮
Cost of Living Estimate Form Cost of Living Estimate Form(Compliance) Arianne Mason	14 Apr 2022	Added note for document...	Sarah, test ...	0	1	⋮
Annual Compliance Record Data Protection & InfoSec(Compliance) Aqualine Aquino	7 Dec 2021	Previewed	Complete response received	0	1	⋮
Weekly Report Weekly Report(Small/Mid Businesses) Karl Chapman	16 Nov 2021	Previewed	Please see weekly report for 7 March 2021	0	2	⋮
SRA AML Declaration AML Declaration(Regulators) Karl Chapman	15 Nov 2021	Previewed	Thank you for your response. This file is now closed until the next review.	2	1	⋮
LifeArc Order Form Order Form - Services(Legal) Karl Chapman	28 Oct 2021	Previewed	Please review, amend and return. Please sign if you have no amendments	0	9	⋮
Quarterly Pension Fund Compliance Pension Fund Compliance(Compliance) Karl Chapman	7 Oct 2021	Previewed	Please find the quarterly compliance assessment please complete ...	0	2	⋮

Web applications - Campaign

Select '+ New Campaign'

Add campaign details

Campaign List

Name	Description	Begin Date	End Date
Campaign Example for Cu...	Example to share with potential ...	5 Feb 2022	31 Dec
Annual DPA & InfoSec 2021	Annual Data Protection and Info...	7 Dec 2021	14 Dec

Edit Campaign

Please activate this campaign by (i) ticking the box and (ii) selecting 'Update Campaign' at the bottom

Campaign Name *
Annual DPA & InfoSec 2021

Campaign Description *
Annual Data Protection and Information Security Training

Campaign Email Owner *
karl.chapman@kimtechnologies.com

Campaign Start Date (Optional)
7 December 2021

Campaign End Date (Optional)
14 December 2021

Return URL (Optional - see tooltip for more information)
https:// www.kimdocument.com

Initial Email Subject *
Kim Annual DPA & InfoSec Training 2021

Initial Email Body (Important - Do not remove [\$tags])* Default Email
Hello [\$userFirstName] [\$userLastName],

Update Campaign Send Reminders Restart Campaign Close

Web applications - 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

Edit Campaign

General

Respondents/Status

Initial Email Subject *
Kim Annual DPA & InfoSec Training 2021

Initial Email Body (Important - Do not remove [\$tags])* Default Email

B I U S " [List Icons] Normal

Hello [UserFirstName] [UserLastName],

As part of its legal and regulatory obligations Kim runs various compliance programs for its employees and contractors. Having attended the '[CampaignName]' 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:**

Reminder Email Subject *
Kim Annual DPA & InfoSec Training 2021 - REMINDER

Reminder Email Body (Important - Do not remove [\$tags])* Default Email

B I U S " [List Icons] Normal

Hello [UserFirstName] [UserLastName],

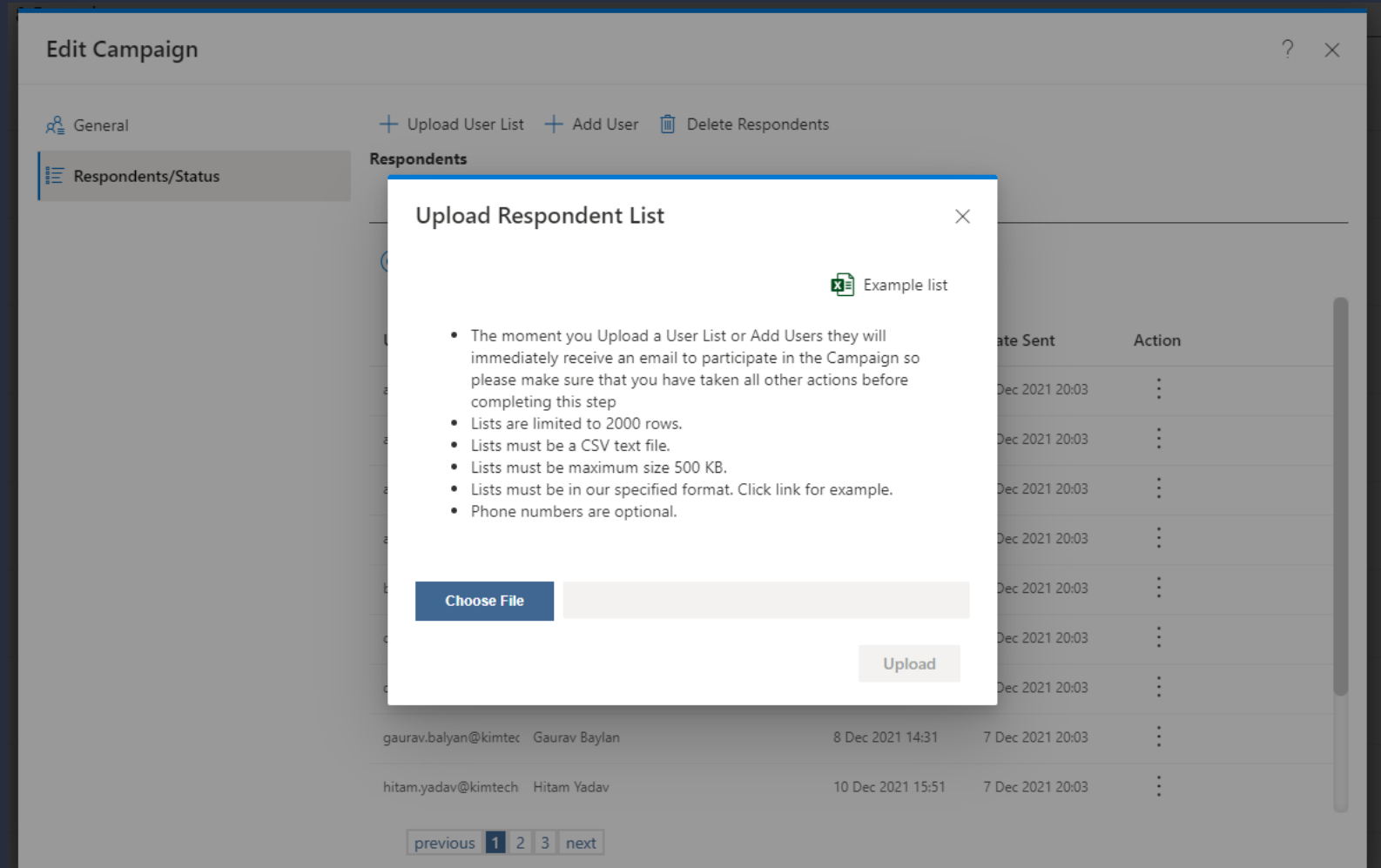
This is a gentle reminder that as part of its legal and regulatory obligations Kim runs various compliance programs for its employees and contractors. Having attended the '[CampaignName]' course you now need to confirm attendance. By no later than Friday 10 December 2021 please **select the link below, enter the access code and complete the form:**

Update Campaign **Send Reminders** **Restart Campaign** **Close**

Web applications - Campaign

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

Send Campaign!



The screenshot shows the 'Edit Campaign' interface with the 'Respondents' tab selected. A modal dialog titled 'Upload Respondent List' is open, displaying instructions and a file upload field. The background shows a table of respondents with columns for 'Name', 'Email', 'Date Sent', and 'Action'.

Upload Respondent List

Example list

- The moment you Upload a User List or Add Users they will immediately receive an email to participate in the Campaign so please make sure that you have taken all other actions before completing this step
- Lists are limited to 2000 rows.
- Lists must be a CSV text file.
- Lists must be maximum size 500 KB.
- Lists must be in our specified format. Click link for example.
- Phone numbers are optional.

Choose File

Upload

Name	Email	Date Sent	Action
Gaurav Balyan	gaurav.balyan@kimtec	8 Dec 2021 14:31	7 Dec 2021 20:03
Hitam Yadav	hitam.yadav@kimtech	10 Dec 2021 15:51	7 Dec 2021 20:03

previous 1 2 3 next

Web applications - Campaign



Kim Annual DPA & InfoSec Training 2021



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

Web applications - 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

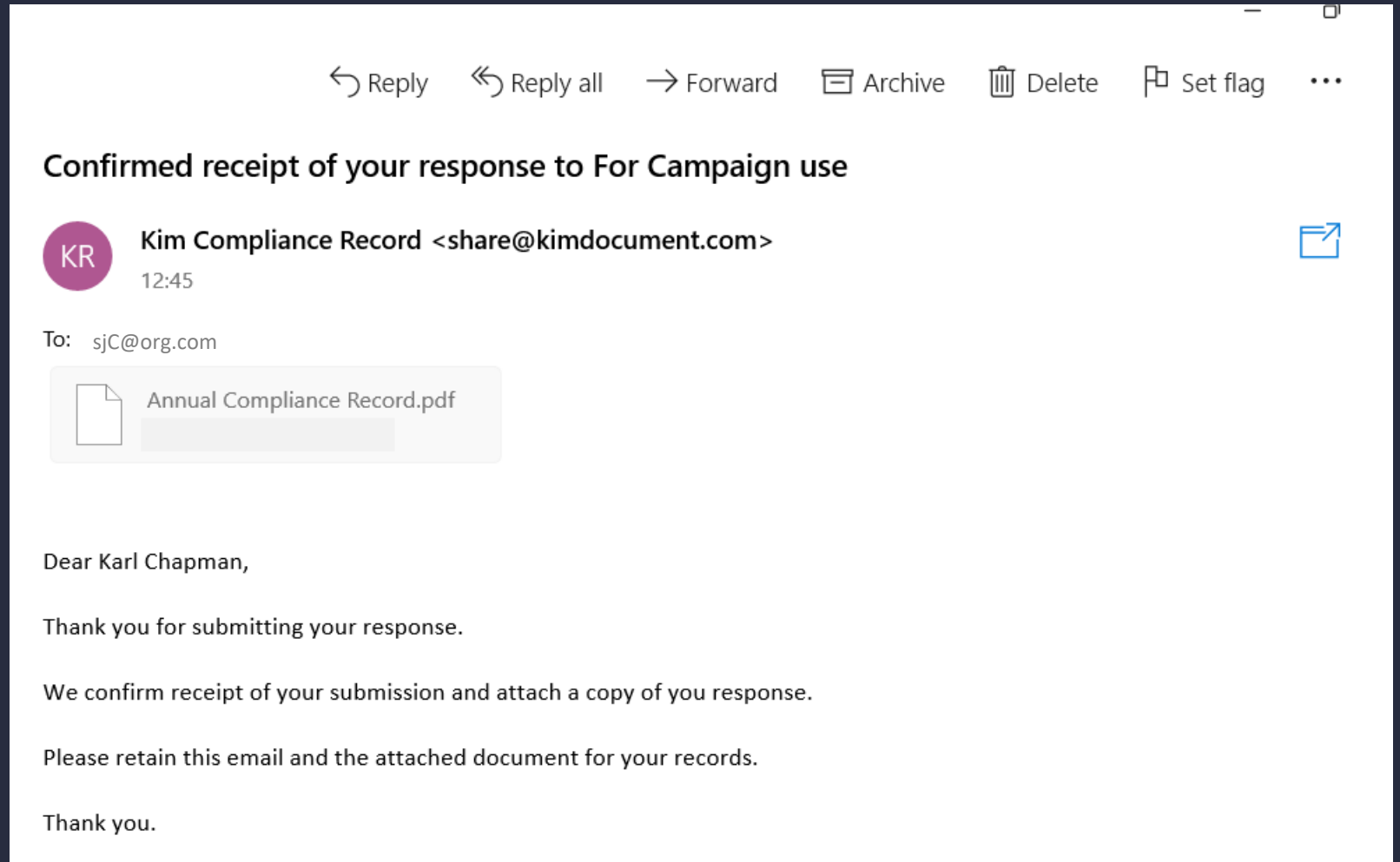
Fields can be made mandatory (*) or optional

The screenshot shows a web application window titled "Data Protection & InfoSec". The form is titled "Kim Technologies Compliance Record" and includes a description: "This is an important record for you to complete. Once completed you will receive an email confirmation of receipt and a copy of your response for your records. A copy of this record will be retained by the Company to demonstrate its compliance with its legal and regulatory obligations." The form contains several fields: "Your Name*" (mandatory), "Date of Compliance Program You Attended*" (mandatory, with a calendar icon), a dropdown menu for "DECLARATION: I Confirm I attended the Annual Data Protection & Information Security Training Course*" (mandatory, with a red error message "Please select a value"), and four dropdown menus for "DECLARATION: I understand my obligations and the company requirements in order to comply with the following:" (UK Data Protection Act / EU GDPR*, Data Classification Policy*, Clear Desk Clear Screen Policy*, and Acceptable Use Policy*, all mandatory). The form ends with "Submit" and "Cancel" buttons.

Web applications - Campaign



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



Web applications - Campaign



Analyze Results

All recipient responses come back into Kim

Full version control is automatically managed

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", a "Help" icon, and the user name "Karl Chapman". The left sidebar contains a menu with options like "Get Started", "Quick Automation", "Applications", and various industry categories such as "Accounting Firms", "Compliance", "Financial Services", etc. The main content area displays a table titled "9 Records". A red box highlights a specific record in the table.

Subject	Activity	Note	Attachment	Version	Action
Annual Compliance Record Data Protection & InfoSec(Compliance) Karl Chanman	27 May 2022	Email sent	0	1	

Web applications - Campaign

Campaign List

+ New Campaign

Name	Description	Begin Date	End Date	Respondent %	Active	Date Created	Action
Campaign Example for Cu...	Example to share with potential ...	5 Feb 2022	31 Dec 2022	10.53%	<input checked="" type="checkbox"/>	5 Feb 2022	⋮
Annual DPA & InfoSec 2021	Annual Data Protection and Info...	7 Dec 2021	30 Nov 2022	92.86%	<input checked="" type="checkbox"/>	7 Dec 2021	⋮

Edit Campaign

General + Upload User List + Add User Delete Respondents

Respondents/Status

Respondents

Search

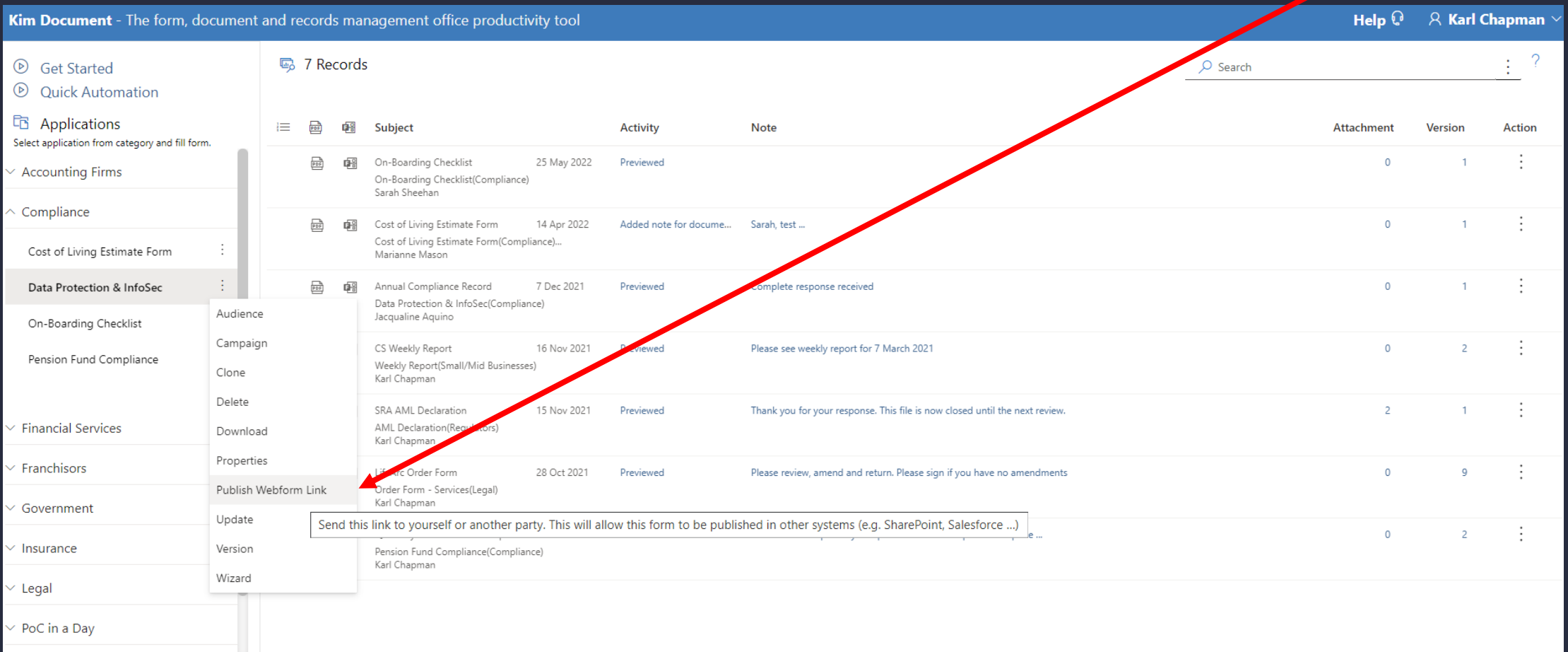
All Incomplete Complete

Username	Name	Phone(Optional)	Date Completed	Date Sent	Action
----------	------	-----------------	----------------	-----------	--------

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

Web applications - 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'



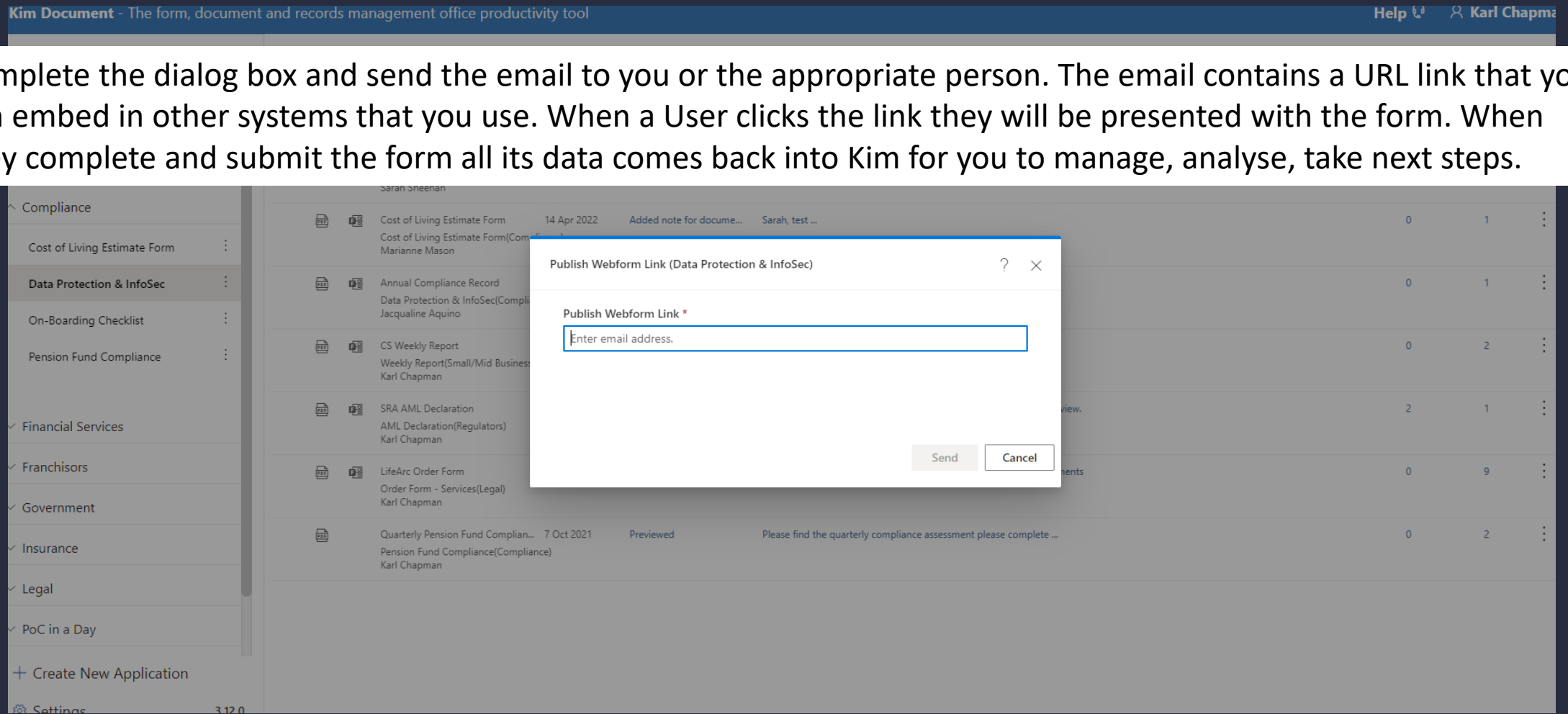
The screenshot displays the Kim Document interface. The top navigation bar includes 'Kim Document - The form, document and records management office productivity tool', 'Help', and the user 'Karl Chapman'. The left sidebar shows a navigation menu with categories like 'Get Started', 'Quick Automation', 'Applications', and various industry-specific sections such as 'Accounting Firms', 'Compliance', 'Data Protection & InfoSec', 'Financial Services', etc.

The main content area shows a table of 7 records. A context menu is open over the 'Publish Webform Link' option for the record 'Order Form - Services(Legal)'. A red arrow points from the text above to this menu item. A tooltip for the 'Publish Webform Link' option reads: 'Send this link to yourself or another party. This will allow this form to be published in other systems (e.g. SharePoint, Salesforce ...)'.

Subject	Activity	Note	Attachment	Version	Action
On-Boarding Checklist On-Boarding Checklist(Compliance) Sarah Sheehan	25 May 2022 Reviewed		0	1	
Cost of Living Estimate Form Cost of Living Estimate Form(Compliance) ... Marianne Mason	14 Apr 2022 Added note for docume...	Sarah, test ...	0	1	
Annual Compliance Record Data Protection & InfoSec(Compliance) Jacqueline Aquino	7 Dec 2021 Reviewed	Complete response received	0	1	
CS Weekly Report Weekly Report(Small/Mid Businesses) Karl Chapman	16 Nov 2021 Reviewed	Please see weekly report for 7 March 2021	0	2	
SRA AML Declaration AML Declaration(Regulators) Karl Chapman	15 Nov 2021 Reviewed	Thank you for your response. This file is now closed until the next review.	2	1	
Life and Order Form Order Form - Services(Legal) Karl Chapman	28 Oct 2021 Reviewed	Please review, amend and return. Please sign if you have no amendments	0	9	
Pension Fund Compliance(Compliance) Karl Chapman			0	2	

Web applications - 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.



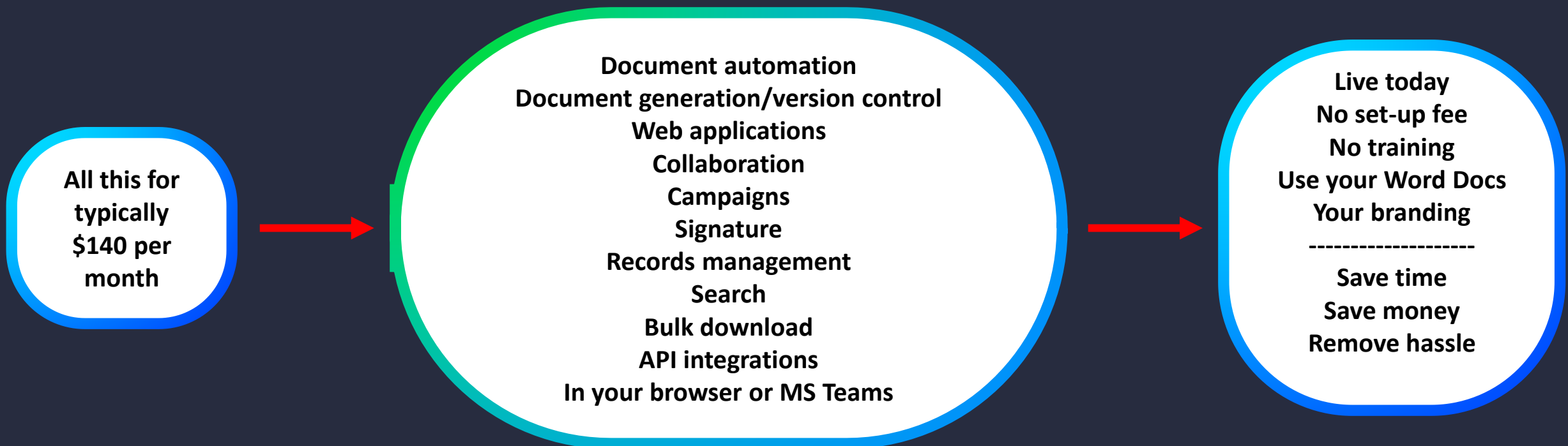
The screenshot shows the Kim Document interface. The top navigation bar includes 'Kim Document - The form, document and records management office productivity tool', 'Help', and the user name 'Karl Chapman'. A left-hand navigation menu lists categories such as Compliance, Data Protection & InfoSec, On-Boarding Checklist, Pension Fund Compliance, Financial Services, Franchisors, Government, Insurance, Legal, and PoC in a Day. The main area displays a list of documents with columns for document name, date, status, and other details. A modal dialog box titled 'Publish Webform Link (Data Protection & InfoSec)' is open in the foreground. The dialog has a title bar with a question mark and a close button. The main content of the dialog is 'Publish Webform Link *' followed by a text input field containing the placeholder text 'Enter email address.'. At the bottom right of the dialog are two buttons: 'Send' and 'Cancel'.

Document Name	Date	Status	Other Info	Count 1	Count 2
Cost of Living Estimate Form	14 Apr 2022	Added note for docume...	Sarah, test ...	0	1
Annual Compliance Record				0	1
CS Weekly Report				0	2
SRA AML Declaration				2	1
LifeArc Order Form				0	9
Quarterly Pension Fund Complian...	7 Oct 2021	Reviewed	Please find the quarterly compliance assessment please complete ...	0	2

Kim Document: A no-regrets decision



Why spend more? Why wait weeks when you can be live today? Why use developers when you can create web applications and automate your documents with no training?



Faster. Better. Cheaper

Simply take your existing letters, forms, checklists, compliance records, contracts and today ...

1. Tag it



2. Upload it



3. Automate it



4. Activate it



5. Share it



6. Analyze it



Faster. Better. Cheaper

Faster

1. Available now via your browser or MS Teams, no new software to download
2. Easy to use interface requiring no User training
3. Use your existing Word documents (or Kim Examples) and be live within 30-90 minutes
4. The Kim Wizard enables 'drag-and-drop' creation of User forms and data fields
5. Bulk download of all data facilitates easy analysis of responses / activity

Better

1. High User adoption because seamless in MS Teams and your browser
2. Quickly automate and 'Share' a document, internally and/or externally, with checkout and version control
3. Run 'Campaigns' for up to 2,000 recipients, track progress, bulk download and analyse results
4. Publish links to your documents on internal or publicly facing systems/sites for Users to complete

Cheaper

1. Only the individuals that automate and activate your documents pay a license fee. Colleagues and customers/third parties who consume the documents pay no fee
2. For example:
Person A automates your NDA. 10 Sales people in your organization send it to 100 customers. Only Person A pays Kim a license fee
3. From \$50/£50/Eur50 per month

Faster. Better. Cheaper



Some Key Features

1. A **SaaS** solution hosted in EU, UK & USA Kim managed MS Azure sites
2. Use your existing **Word** documents or Kim 'Examples'
3. Unified **Workspace** enabling all activity from one screen view
4. Kim '**Example**' documents (e.g. NDA, On-boarding Checklist ...)
5. Drag-and-drop automation '**Wizard**'
6. Extensive internal and external collaboration via '**Email**', '**Share**' and '**Send Webform Update Link**'

Benefits

Save time, money and hassle

1. Live in minutes, secure, no implementation fee
2. Use the documents you already have, make available internally and/or externally, realise benefits from day one
3. Easy User experience, everything in one place, few clicks, no training required
4. You can take a Kim example document, press 'Create' and you can use it internally/externally within minutes
5. Take your existing documents (content, layout, branding) upload into Kim and use the Wizard to quickly automate
6. Flexibility in how you choose to interact with colleagues/third parties with full records management

Faster. Better. Cheaper



Some Key Features

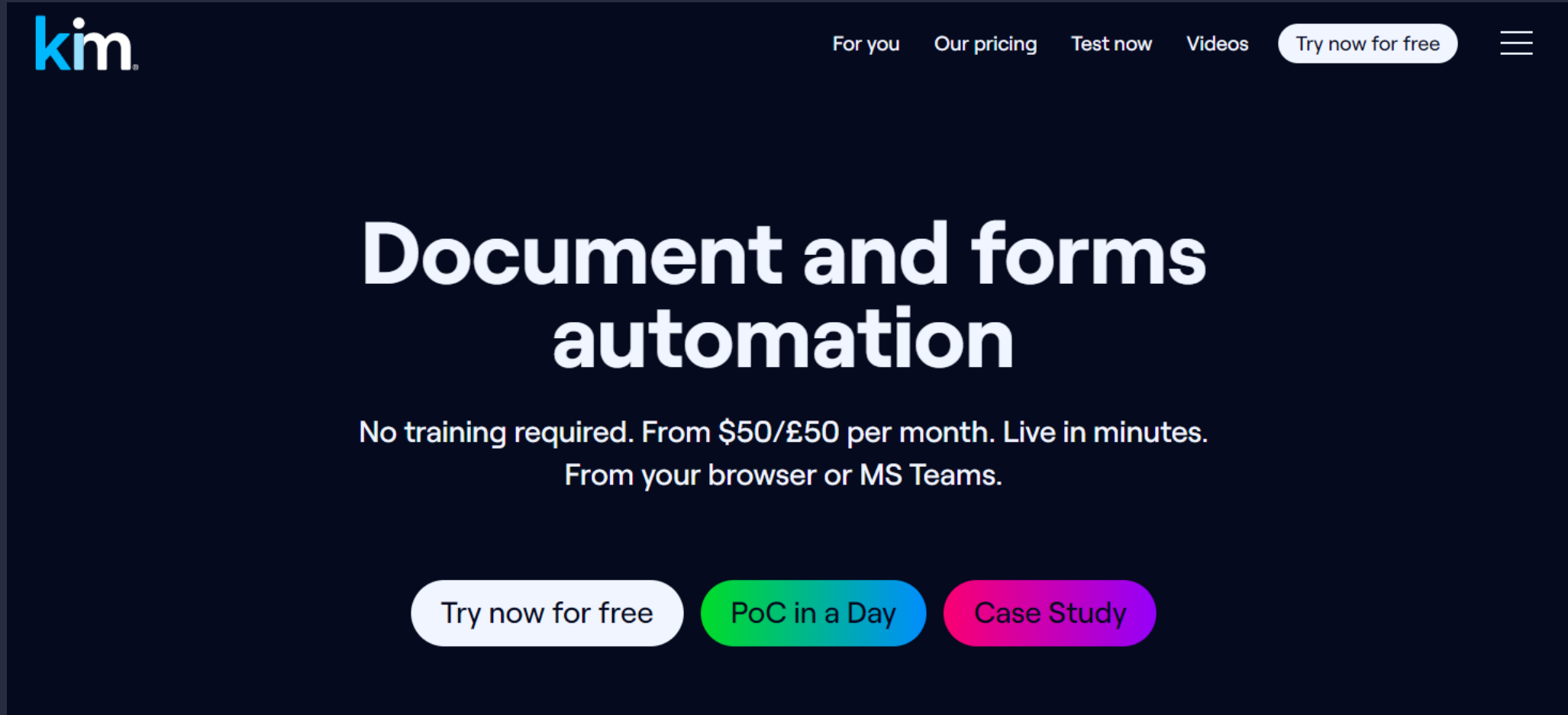
7. Send and manage **'Campaigns'** to up to 2,000 recipients
8. Create in Kim and **'Publish Webform Link'** that can be embedded on your other internal / publicly facing systems
9. Easy **'Bulk Download'** of all data
10. Enterprise **'Search'**
11. Ability to **'Checkout / Check-in'** document collaboration and full **'Version Control'**
12. Full **'Records management'**
13. Accessed via your browser or **MS Teams**
14. Integration via Kim **APIs**

Benefits

Save time, money and hassle

7. Upload once, distribute automatically to all recipients, track progress, send reminders analyse results
8. Meet your target audience where they are, by creating in Kim and publishing the link on systems people already use
9. Easy and quick analysis of all activity and data
10. Quick to find what you need using Search/Advanced Search
11. Easy collaboration and tracking of latest version, plus audit trail for all changes
12. Records management, audit trail and archiving
13. Drives User adoption
14. Enables wider deployment of Kim

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 heading is 'Document and forms automation' in large white text. Below the heading is the text 'No training required. From \$50/£50 per month. Live in minutes. From your browser or MS Teams.' At the bottom are three buttons: 'Try now for free' (white), 'PoC in a Day' (green), and 'Case Study' (purple).

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

www.kimdocument.com