



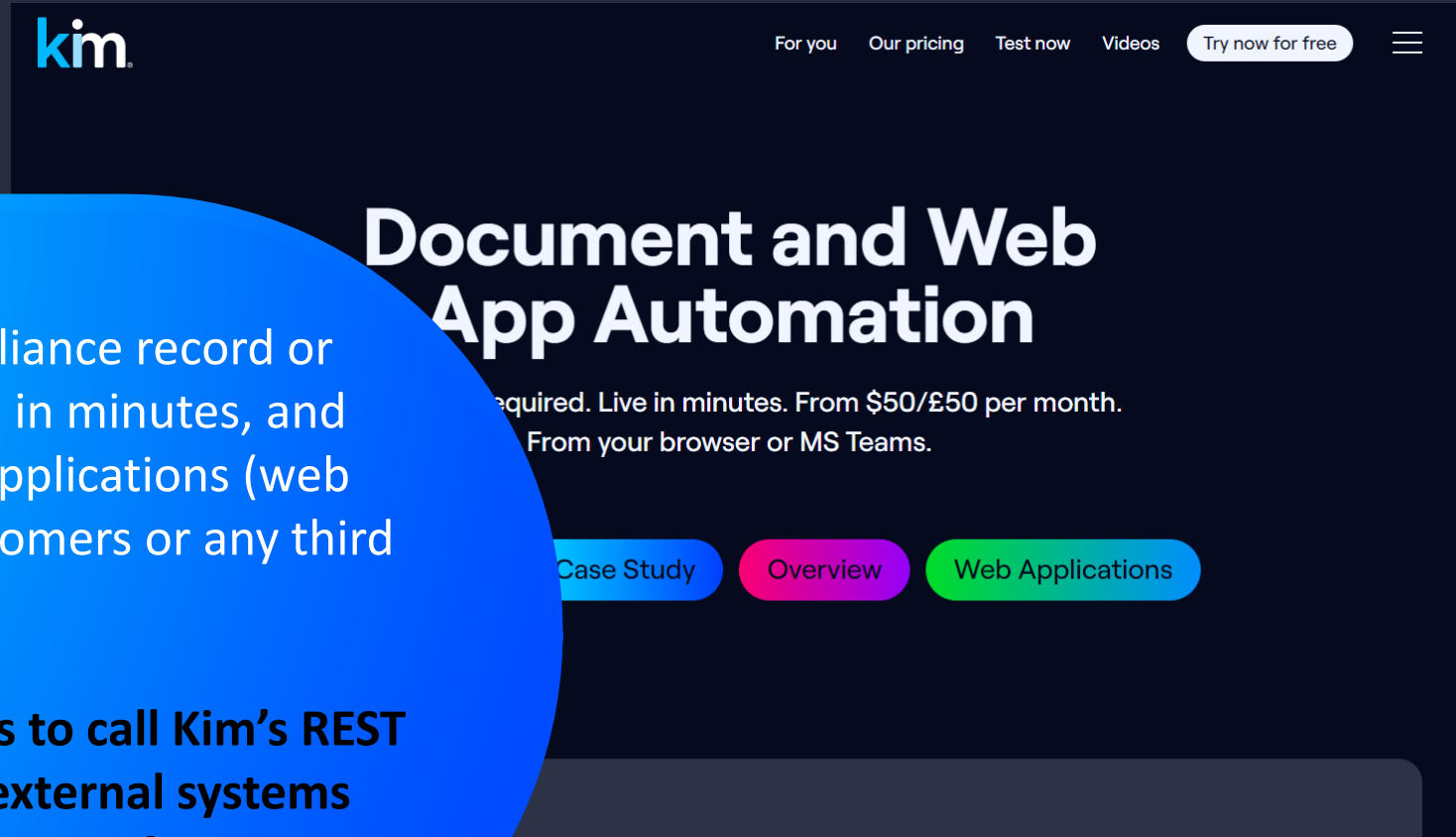
Kim Document APIs

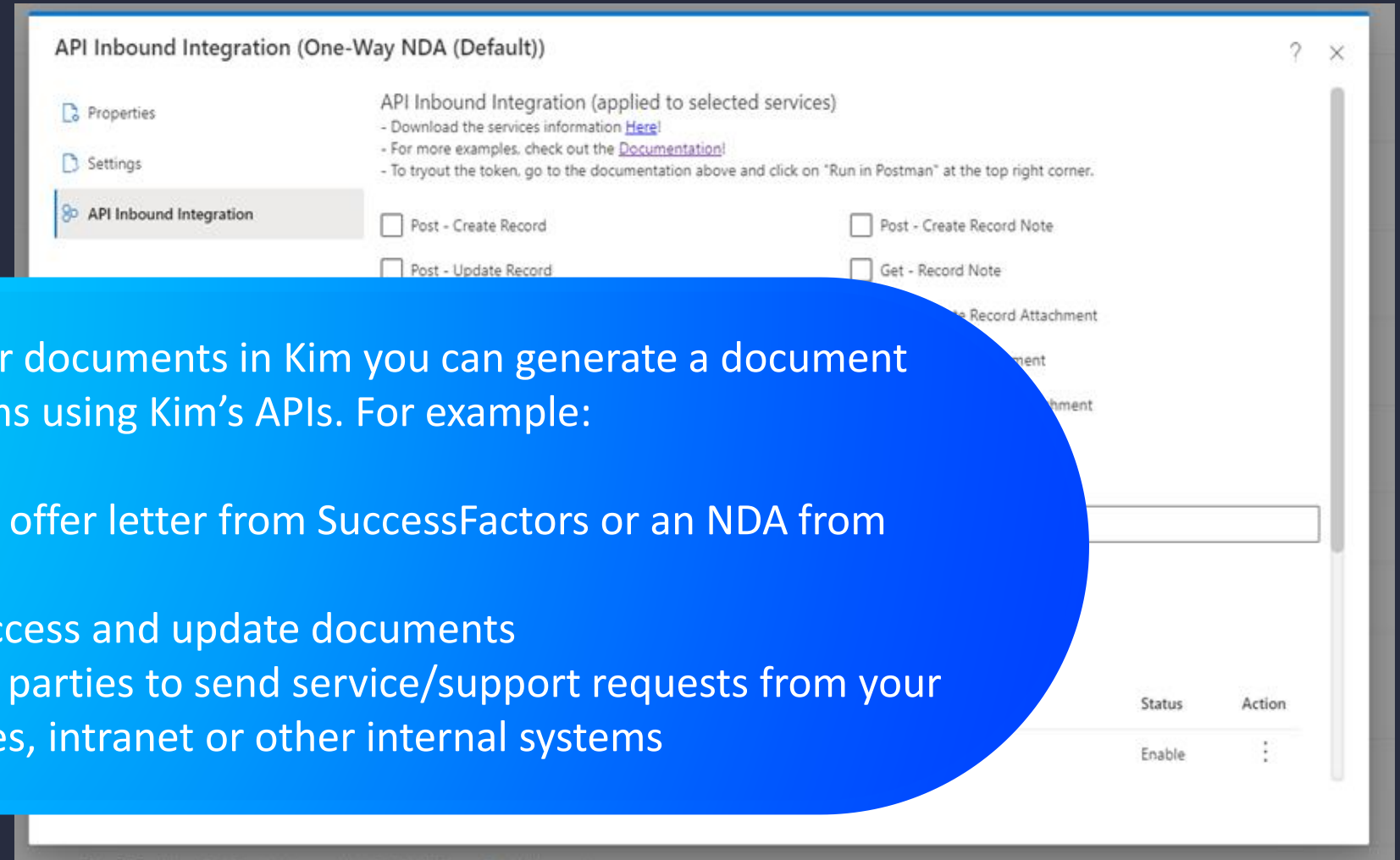
June 2022

Available from your browser or MS Teams

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 and ...

... you can also use Kim's Inbound APIs to call Kim's REST Services. These services are used for external systems to Create, Update and Retrieve information from Kim without using the User Interface (UI).





Having automated one of your documents in Kim you can generate a document from one of your other systems using Kim's APIs. For example:

- (i) generating an employment offer letter from SuccessFactors or an NDA from Salesforce
- (ii) allowing a third party to access and update documents
- (iii) allowing internal/external parties to send service/support requests from your website or your accounts, sales, intranet or other internal systems

APIs

To achieve this all you do is, from the left-hand menu select the document you want to apply the APIs to, select the three dots and from the menu select 'Properties'. From here select 'API Inbound Integration'

The screenshot shows the Kim Document application interface. On the left, there is a navigation menu with categories like Accounting Firms, Compliance, Financial Services, Franchisors, Government, Insurance, and Legal. A red box highlights the 'Data Protection & InfoSec' section. In the center, a document titled 'On-Boarding Checklist' is selected, and a context menu is open over it. The 'Properties' option in the menu is highlighted, and a red arrow points to it. Below the menu, a tooltip says 'Edit Application Properties.'

The screenshot shows the 'API Inbound Integration (Data Protection & InfoSec)' configuration window. It has a sidebar with 'Properties' and 'Settings' tabs, and 'API Inbound Integration' is selected. The main area contains a list of API endpoints with checkboxes for each. Below the list is a 'Token Name' field with a 'Generate Token' button. At the bottom, there is a table with columns for Name, Token, Status, and Action.

Name	Token	Status	Action
------	-------	--------	--------

API Inbound Integration (One-Way NDA (Default))

API Inbound Integration (applied to selected services)

- Download the services information [Here!](#)
- For more examples, check out the [Documentation!](#)
- To tryout the token, go to the documentation above and click on "Run in Postman" at the top right corner.

<input type="checkbox"/> Post - Create Record	<input type="checkbox"/> Post - Create Record Note
<input type="checkbox"/> Post - Update Record	<input type="checkbox"/> Get - Record Note
<input type="checkbox"/> Post - Retrive Bulk Download	<input type="checkbox"/> Post - Create Record Attachment
<input type="checkbox"/> Get - Record Status	<input type="checkbox"/> Get - Record Attachment
<input type="checkbox"/> Post - Enterprise Search Record	<input type="checkbox"/> Get - Delete Record Attachment

Token Name (Max. 50 characters) *

Example: Demo Token

Generate Token

Name	Token
Jarvis Consulting Widgets Enablement	Show

Now simply (i) check the actions you want to allow (i.e. 'Post - Create Record', 'Post - Update Record' ...), (ii) give the Token a name, (iii) generate the token and (iv) provide it to your IT team to do the rest.

For example, you have uploaded a 'Support Request Form' to Kim. You now want this Request Form to be filled from your sales, finance or HR system or from your intranet site:

(i) check the required boxes.
(ii) name the integration (Token) and click 'Generate Token'.

API Inbound Integration (Data Protection & InfoSec)

API Inbound Integration (applied to selected services)

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- For more examples, check out the [Documentation!](#)
- To tryout the token, go to the documentation above and click on "Run in Postman" at the top right corner.

<input checked="" type="checkbox"/> Post - Create Record	<input type="checkbox"/> Post - Create Record Note
<input checked="" type="checkbox"/> Post - Update Record	<input type="checkbox"/> Get - Record Note
<input type="checkbox"/> Post - Retrive Bulk Download	<input checked="" type="checkbox"/> Post - Create Record Attachment
<input type="checkbox"/> Get - Record Status	<input type="checkbox"/> Get - Record Attachment
<input type="checkbox"/> Post - Enterprise Search Record	<input type="checkbox"/> Get - Delete Record Attachment

Token Name (Max. 50 characters) *

ABC Support Request Form

Generate Token

Name	Token	Status	Action
------	-------	--------	--------

Applications

Select application from category and fill form.

- HR
- IT
- Kim Contracts and Letters
- Kim Order Forms

API Inbound Integration (One-Way NDA (Default))

Properties

Settings

API Inbound Integration (applied to selected services)

- Download the services information [Here!](#)
- For more examples, check out the [Documentation!](#)
- To tryout the token, go to the documentation above and click on "Run in Postman" at the

Post - Create Record

Post - Update Record

Post - Create

Get - Record f

The Token is generated. If you provide this Token to your internal IT team they will use it to set up the integration. Use the Service Description option

```
Apintegration (7).txt - Notepad
File Edit Format View Help
Get Started!
For more examples, check out the documentation at https://documenter.getpostman.com/view/21048320/Uz5F3bfc
To tryout the endpoints, go to the documentation above and click on "Run in Postman".

Get Template
Method: GET
Url: https://kim-document-teams.azurewebsites.net/ApiIntegration/TemplateXml?Format={{format}}
Authorization: eyJhbGciOiJIc3EiLCJ1bmMiOiJBMjU2Q0JDLUhTNTYiIiwidHlwIjois1dUIiwiaWF0IjoiS1dUIn0..bUqs1V_JfPgI5Z2vJNEaKg.rXjYyr_VPSZyRXV7z_Hap36ExYNBr3v1qFGGL0rN
Url Parameters:
{
  format: string
}

Get Record
Method: GET
Url: https://kim-document-teams.azurewebsites.net/ApiIntegration/Document?DocumentId={{documentId}}
Authorization: eyJhbGciOiJIc3EiLCJ1bmMiOiJBMjU2Q0JDLUhTNTYiIiwidHlwIjois1dUIn0..bUqs1V_JfPgI5Z2vJNEaKg.rXjYyr_VPSZyRXV7z_Hap36ExYNBr3v1qFGGL0rN
Url Parameters: {
  documentId: string
}

Create Record
Method: POST
Url: https://kim-document-teams.azurewebsites.net/ApiIntegration/CreateDocument
Authorization: eyJhbGciOiJIc3EiLCJ1bmMiOiJBMjU2Q0JDLUhTNTYiIiwidHlwIjois1dUIn0..bUqs1V_JfPgI5Z2vJNEaKg.rXjYyr_VPSZyRXV7z_Hap36ExYNBr3v1qFGGL0rN
Content-Type: application/json
```

Status	Action
Enable	<ul style="list-style-type: none">ServicesService DescriptionDisable Service DescriptionDelete

POSTMAN

ENVIRONMENT QA-ApiIntegration LAYOUT Double Column LANGUAGE cURL

KIM DOCUMENT - API INTEGRATION

Introduction

- Token
 - GET GetTemplateXml
 - POST CreateDocument
 - GET GetDocument
 - POST UpdateDocument
 - POST BulkDownload
 - GET DocumentOnlyStatus
 - POST AdvanceSearch
 - POST DocumentOnlyAddNote
 - GET DocumentOnlyNote
 - POST DocumentAttachment
 - GET DocumentOnlyAttachment
 - GET DeleteDocumentOnlyAttachment

Token

Demo

POST CreateToken

`https://kim-document-teams.azurewebsites.net/ApiIntegration/Token`

Creates a token for the Api Integration Services

TokenStateManagement:

- Name: string - Token Name displayed on the application.
- IsActive: boolean - Token Status (Enable/Disable)
- Methods: Array - List of Services:

- 0 - Create_Record
- 1 - Update_Record
- 2 - Retrieve_Bulk_Download
- 3 - Record_Status
- 4 - Enterprise_Search_Record
- 5 - Create_Record_Note
- 6 - Record_Note
- 7 - Create_Record_Attachment
- 8 - Record_Attachment
- 9 - Delete_Record_Attachment

HEADERS

Authorization: Basic //kim-document.token\

Public Run in Postman

Your IT team can test Kim's APIs by visiting our publicly available Postman link at <https://documenter.getpostman.com/view/21048320/Uz5FJbfc>

APIs



From Postman your IT team can call 'CreateDocument' service to create "Record Create From Postman" record in the Kim Document workspace.

The screenshot shows the Postman interface for a workspace named 'Kim Document'. The active request is a POST to 'https://kim-document-teams.azurewebsites.net/ApIntegrat.../CreateDocument'. The body is raw XML. The response is a JSON object indicating success.

```
POST https://kim-document-teams.azurewebsites.net/ApIntegrat.../CreateDocument
```

Body (raw):

```
1 <?xml version="1.0" encoding="utf-8" ?>
2 <!-- TemplateXml: --><root><field CompanyRepresentative="Joan Smith"><structure dataType="string" culture="en-US" checkedValues=""/></field><field CompanyName="Quick Enterprises"><structure
  dataType="string" culture="en-US" checkedValues=""/></field><field CompanyAddress="2 Main Street"><structure dataType="string" culture="en-US" checkedValues=""/></field><field
  RecipientRepresentative="Phil Simmons"><structure dataType="string" culture="en-US" checkedValues=""/></field><field RecipientCompanyName="Widgets Intl"><structure dataType="string"
  culture="en-US" checkedValues=""/></field><field RecipientCompanyAddress="3 Main Street"><structure dataType="string" culture="en-US" checkedValues=""/></field><field AnotherTag="Test
  Value"><structure dataType="string" culture="en-US" checkedValues=""/></field><field NDASState="Texas"><structure dataType="string" culture="en-US" checkedValues=""/></field><field NewTag="
  [value]"><structure dataType="string" culture="en-US" checkedValues=""/></field><field CompanyRepresentativeTitle="CEO"><structure dataType="string" culture="en-US" checkedValues=""/></
  field><field RecipientTitle="CEO"><structure dataType="string" culture="en-US" checkedValues=""/></field><ccs><cc type="2" tag="CompanyRepresentative"/><cc type="2"
  tag="CompanyName"/><cc type="2" tag="CompanyAddress"/><cc type="2" tag="RecipientRepresentative"/><cc type="2" tag="RecipientCompanyName"/><cc type="2"
  tag="RecipientCompanyAddress"/><cc type="2" tag="AnotherTag"/><cc type="2" tag="NDASState"/><cc type="2" tag="NewTag"/><cc type="2" tag="CompanyRepresentativeTitle"/
  ><cc type="2" tag="RecipientTitle"/></ccs></root>,
3 <!-- Description: "Record Create From Postman",
4 <!-- TargetCulture: "en-US",
5 <!-- OnBehalfUser: "richard.yawn@kimtechnologies.com"
6 </pre>
```

Response (pretty):

```
1 {"Success":true,"Result":"Document created","CaseNumber":"Record Create From Postman","Id":"28575","ExceptionMessage":"","ResponseType":0}
```

APIs

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

1626 Records Search

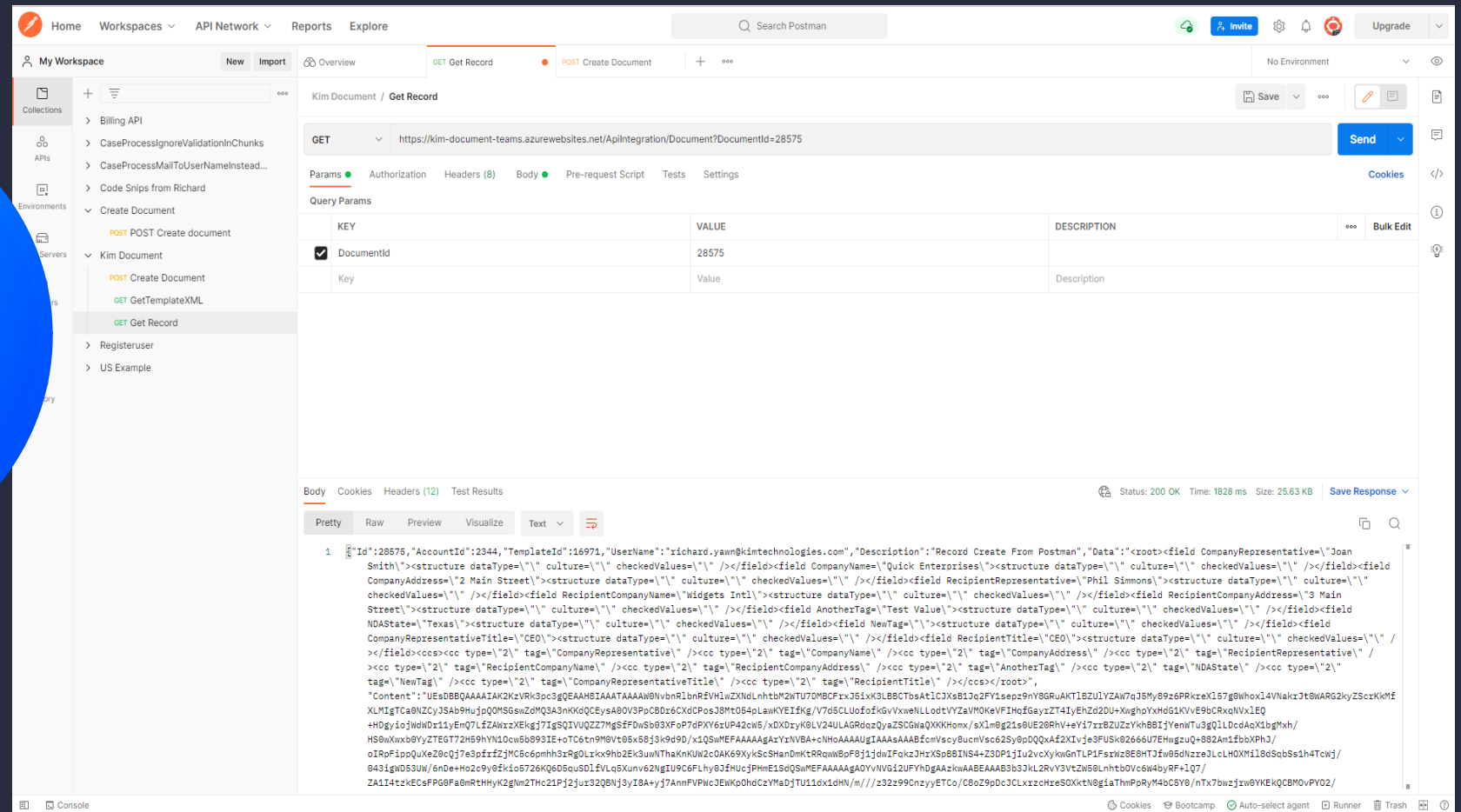
Subject	Activity	Note	Attachment	Version	Action
Record Create From Postman <small>New Record</small> One-Way NDA (Default)(Personal Documents... A Yawn	Created document		0	1	
New NDA One-Way NDA (Default)(Personal Documents... A Yawn	Attachment Tracking Tec...			1	
Evaluate Billing One-Way NDA (Default)(Personal Documents... A Yawn	Updated document				
Nelson Test Campaign Accumulator Application01(CategoryFEB) A Yawn	Previewed				
test 3 One-Way NDA(Personal Documents)	Previewed		0	1	
Kim and [Enter Other Party] <small>Updated</small> One-Way NDA(Personal Documents)	Attachment Kim Docum...		2	2	
Nelson Test Campaign Accumulator <small>New Record</small>	Created document		0	1	

The record is created.

APIs



Records content can be pulled by the API - data points, base64 image in the content and other records properties.





Kim Document A No-Regrets Decision!

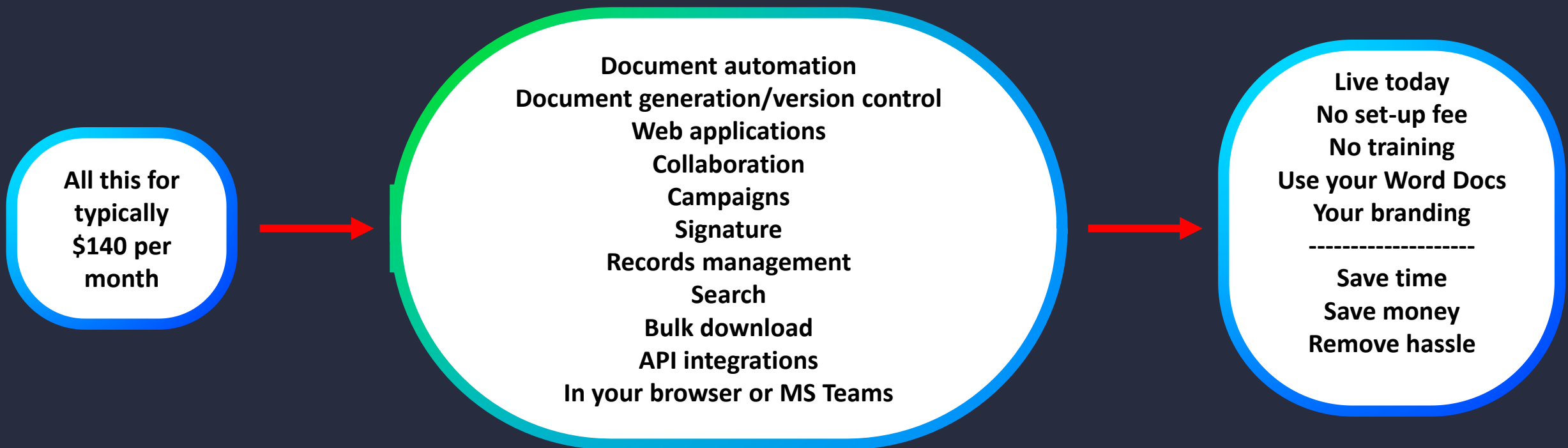
June 2022

Available from your browser or MS Teams

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



The screenshot shows the homepage of the Kim Technologies website. At the top left is the 'kim' logo. The top right navigation bar includes links for 'For you', 'Our pricing', 'Test now', and 'Videos', followed by a white button labeled 'Try now for free' and a hamburger menu icon. The main content area features a large white heading: 'Document and forms automation'. Below this is a sub-headline: 'No training required. From \$50/£50 per month. Live in minutes. From your browser or MS Teams.' At the bottom of the main content area are three buttons: 'Try now for free' (white), 'PoC in a Day' (green), and 'Case Study' (purple).

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www.kimdocument.com