

AXDRAFT QuickDocs in a Nutshell

OVERVIEW

Customer service is not always the strongest part of legal operations. Especially when there's an agreement to be signed. 30 minutes spent on contract processing, signing, and delivery can turn into hours thanks to human-caused bottlenecks caused by minor change reviews.



And while this may negatively affect the mood of your client, there is a worse impact. Hours that a lawyer wasted on routine contract management could be spent on ensuring the legality of the company's new strategy, or on protecting the company's reputation. Imagine this situation: you need your client to sign an NDA. To get them to do it, all you need is to go make a cup of coffee, sit back, and wait for them to fill in the template. A few minutes later the document is in your storage.

You don't even need to e-sign it. It's all taken care of by the software.

Wouldn't that be neat?

Good news, self-service document automation turns this from make-believe to your everyday reality.

What is self-service document automation?

Quick background fact: over **60% of US customers** would give their preference to automated self-service for simple tasks.

What this means is that your clients actually expect more flexibility and less involvement of your team. The reason is simple: it gives them more control over the onboarding process and allows them to move forward at a pace they prefer, without any bottlenecks.

Setting up self-service document automation workflows means that your legal department does not need to get involved in contract drafting, review, or negotiation processes. That's what the software is for.

The name speaks for itself. Self-service contracts take care of your document workflow for you. All you need to do is set up a template, and let your clients take care of filling it with data. At the end, they get a signed agreement, and you get every piece of information your client filled in.

What is AXDRAFT QuickDocs?



AXDRAFT QuickDocs is a self-service document automation platform that allows you to go from 30 minutes on average to 0 minutes spent on drafting and signing simple contracts such as NDAs, DPAs, sales agreements, or SOC-2 report requests. The platform fully eliminates the need for lawyers to step into the workflow, and guarantees that your legal team receives **100% compliant, perfectly structured, and branded** legal documents.

Here's what the document drafting workflow will look like for your users:

1. A client gets a link to the template.
2. They fill in all the data, submit and sign the document.
3. They get a signed and approved contract sent through email seconds later.

As all your templates are pre-approved and signed on your end. The entire process takes less than 5 minutes and requires zero involvement from your legal function.

See how we set up QuickDocs for [Slack](#) and [Vimeo](#) Data Processing Agreements.

What makes QuickDocs unique?

The legal technology market is packed with plenty of amazing contract lifecycle management solutions, but only a few of them offer self service processes.

AXDRAFT QuickDocs is the only platform that provides the following features:

1. **Document storage and analytics.** Every contract that has ever been drafted is accessible for your team for as long as you need it, and can be easily found with in-text search or metadata.
2. **Document and form branding.** Both the template and your final documents will match the corporate style.
3. **Question-based drafting.** Your contract template can vary from client to client, and our software will automatically adjust the final look of your document based on the answers to the simple questions your client gives.
4. **Unlimited users and number of documents.** We don't charge for the volume of contracts you draft, or for the extra accounts.
5. **Public templates.** Just embed a link to the document on your website.



Superpowers unlocked by QuickDocs

Every company wants to think of their legal department as the team that never drops any balls. Sadly, sometimes the amount of work your lawyers get on their plates is so overwhelming that it becomes physically impossible to get everything done on time.

QuickDocs allows you to streamline legal operations and make sure your lawyers always have time to address high-value and more sophisticated tasks. By automating simple documents, you'll be able to:

- **Save time.** Drafting simple legal documents will no longer take up valuable time.
- **Reassess your workload.** You'll get more room for the tasks that have been sitting on your to-do lists for a while.
- **Cut legal costs.** QuickDocs saves you 30% worth of your lawyer's salary, and allows you to avoid hiring new talent for low-profile tasks.
- **Make data-driven business decisions.** With contract data at your fingertips, you won't miss any growth opportunities.
- **Provide unparalleled customer experience.** Your customers will be impressed by the ease of onboarding.
- **Make your legal team happier** with the value of the work they do. Let them put their talent to good use.

Getting started with QuickDocs

It wouldn't make any sense if we were rooting for quick and simple onboarding, and made this a bumpy ride for you, right? =)

To get QuickDocs up and running, you only need to go through a few simple steps.

First, you need to let us know which document templates you'd like to automate. **Estimated time: 30 minutes.**



Second, you drop us these templates. **Estimated time: 15 minutes.**

Third, we analyze these templates for patterns and prepare one automated template for each document type. **Estimated time: >3 days.**

Fourth, you make small tweaks to the workflow and the look of your documents and emails sent with QuickDocs. **Estimated time: 15 minutes.**

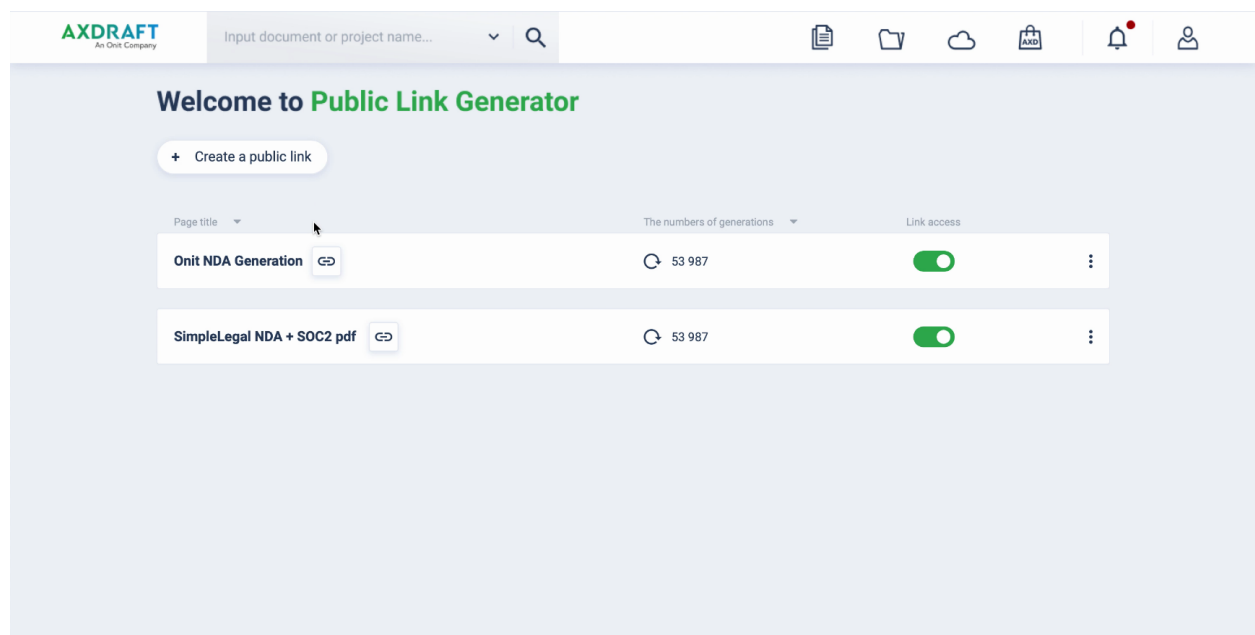
Finally, you start sharing these templates via messaging your clients a link directly, or simply adding a public link to your website. **Estimated time: >1 minute.**

Adding up, you'll get a ready-to-use automated legal document template in 3 days and 1 hour if you're new to AXDRAFT. If you already have an AXDRAFT account, it will only take about 30 minutes.

Below, we'll walk you through the basic setup actions you'll need to take to get started with QuickDocs through the admin panel.

First, navigate to **Profile ->Public link Generator**.

There you'll see a list of all self-service templates available for you to use. You'll either have them set up by our team, or you can turn any existing AXDRAFT template into the self-service document template.



You can enable or disable them via toggling the Link access box. When enabled, this template will be available to anyone with the link. If disabled, it will only be visible to you.

To copy the link, just click the icon next to the document name.

You can edit the existing public-facing template, or create a new one by clicking '**Create a public link**'.

Let's go through the steps to create a new public link. You'll be taken to the following screen:

v 1.1 Add document owner

AXDRAFT
An Onit Company

Input document or project name...

[Return to list](#)

Generating a new public link

Public access to document generation allows any user to generate the selected document without access to axdraft. You can add a signature, customize an email that the user will receive, or even attach an additional file in the appropriate sections.

Page title *
Recommended using titles that can easily determine the context of use.

Public NDA generation

Main message
Message in first screen. Use it to inform users about next steps, conditions or other information

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc id tortor rhoncus, venenatis risus in, aliquam metus. Fusce a aliquam tortor. Pellentesque fermentum egestas quam at molestie.

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Add document's owner *
All generated files are linked to particular person linked below

George Nelson

☐ Do not index this page in Google

If you have any difficulties with creating a link, please contact our team at help@axdraft.com and we will help you figure it out

Step 1 Template setup

Choose template

Axdraft Startup - Founders Agreement

Continue Cancel

Step 2 Workflow setup

Step 3 Email Customization

Step 3 Attached file

Step 4 Link generation

Create public link

Notice: The link will be generated in the off state. It must be activated on the list page

To your left, you will see the **Page title** and **Main message** fields. The page title is the name of your template that will be visible for your clients or counterparties.

You will also get a checkbox that allows you to **remove the page from Google index**. By default, your public template can be crawled by Google search engine and displayed in the search results. If you'd like to make it private, check this box and the page will not be visible for anyone who googles it.

On this page, you can set up the **owner of the document** from the list of your company members. The document will be saved in that person's AXDRAFT storage.

The page title is the name of your template that will be visible for your clients or counterparties.

AXD Onit - NDA

[Back to questions](#)

Type in your company legal name example: ACME LLC ACME LLC Type in your company type example: a New York LLC New York LLC Type in date of NDA 03/07/2021 Describe the purpose of entering into NDA	NON-DISCLOSURE AGREEMENT This non-disclosure agreement ("agreement") is made on 03/07/2021, between: ACME LLC New York LLC ("Company") and the other party named on the signature page below ("Other Party") to protect certain confidential information being disclosed between Company and the Other Party solely for the purpose of Performing security audit of server infrastructure ("Purpose"). Company and Other Party may be referred to in this agreement individually as a "party" and collectively as "parties". 1. Confidential Information. "Confidential Information" means the proprietary information exchanged between parties, which includes, without limitation, information (tangible or intangible) regarding a party's technology, software code, software source documents, techniques, research, know-how, specifications, product plans, pricing, customer
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The main message will be displayed on the loading screen, while the document is being prepared by AXDRAFT.



Constructing a page

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc id tortor rhoncus, venenatis risus in, aliquam metus. Fusce a aliquam tortor. Pellentesque fermentum egestas quam at molestie.

[Got it](#)

You can add any name and any descriptive text to these fields.

To your right, you will see a separate section that allows you to set up a workflow for the new self service template.

Step 1. At this point, you'll need to select the template that you want to make public. It will be taken from the list of all templates that are available inside your account.

Step 1

Template setup

Choose template

Select...

▼

Continue

Cancel

Step 2

Workflow setup

Step 3

Email Customization

Step 3

Attached file

Step 4

Link generation

Create public link

Notice:

The link will be generated in the off state. It must be activated on the list page

Step 2. At this step, you select whether you want the clients to be able to draft the document, or draft and e-sign.

If you choose ‘Draft only’, you’ll be automatically taken to Step 6. If you choose ‘Draft and sign’, a few extra steps will be added.

Step 1

Template setup

Edit 

Step 2

Workflow setup

☒ Draft only

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras convallis lectus et semper congue.

☐ Draft and sign

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras convallis lectus et semper congue.

Continue

Cancel

Step 3. If you select to sign the document, you'll need to set up an e-signature next. You can define who will need to sign the document: just the client, both you and the client, and you can also CC any other person involved (they don't necessarily have to be your company members).

By default, all documents will be signed with AXDRAFT sign, unless you select a different provider by clicking 'Change e-sign provider'.

The screenshot displays a web interface titled "Step 3 E-sign setup: AXDRAFT Sign". At the top, there is a button labeled "Change e-sign provider". Below this, the section "Set signing order" contains a vertical progress indicator with four steps: "1 Step 1", "2 Step 2", "CC", and "Completed".

- Step 1:** Shows a box for "External user" with a blue person icon and a three-dot menu.
- Step 2:** Shows a box for "Company user (you)" with a green person icon, a three-dot menu, and an "Edit" button with a pencil icon. Below this box is the text: "You can set specific signer or group of signors it this step."
- CC:** Includes a button with a plus sign and the text "Add copy".
- Completed:** Indicated by a green checkmark icon.

At the bottom of the interface are two buttons: a green "Continue" button and a white "Cancel" button with a red border.

Step 4. After that, you'll be asked to set up the look of the email that will be delivered to your clients with the document.

In this section, you can edit the text of the email, the call-to-action on the button, and the link on the button.

If you'd like to edit the style of the email, you'll need to navigate to the Preferences page, where you can set up the colors, the fonts, and the logo that will be included in the email.

Step 3 Email Customization

You can change text of email, CTA and footer. If you want to change logo or colors you can do it at [Preferences page](#)

Main text

Hello,

Please find the document Axdraft Startup - Founders Agreement attached.

If something does not work, please contact us at help@axdraft.com

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The presence of a call to action (CTA) ☒

CTA label

Label of your button

Go to AXDRAFT

CTA link

Where users go after clicking on the button

www.axdraft.com

Footer

Thanks for choosing us,
AXDRAFT Team

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Step 5. Next, you can select an external file that will be attached to the email. This can be any file, in any format. You can choose to attach multiple files to one email.

Step 5

Attached file (optional)

You can upload external documents as attachments. This attachments will be also added to email and send in the end of flow.

Upload file 

3 documents in attachment:

PDF

Employee Offer Letter



xlm

Employee Offer Letter



docx

Employee Offer Letter Employee Offer Letter ...



xlm

Employee Offer Letter

Continue

Cancel

Step 6. Finally, you'll be asked to choose the format of the link. This can be a branded link that includes your company name, or a short link.

Step 6

Link generation

☒ Brand link

We use company name and template name to form your URL

simplelegal.axdraft.com



☐ Short link

We use shortener algorithm to form your URL

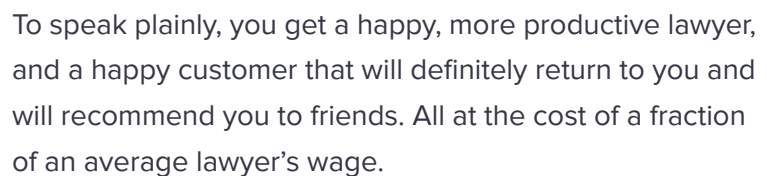
axdraft.com/ovAL5



When you're done with all of these steps, all you need to do is click 'Create public link' and you're all set!

You'll be taken back to the list of all public templates. Please note that by default your template will be disabled after you create it, so you'll need to enable it first.

Self-service document automation solutions give lawyers what they always lack--precious time to take care of important work. What they also provide is customer experience that your clients actually enjoy.



Focus on impactful work only, while self-service document automation software takes care of simple, time-consuming tasks for you, along with your clients.

See how self-service contracts can boost the efficiency of your legal team. Try [AXDRAFT Quickdocs](#), go from 30 minutes to 0 minutes on simple contract drafting. If you're ready to move



forward, just [book a live demo](#) and our team of legal and tech-savvy experts will help you set up self-service templates.

Contact us at sales@axdraft.com

Call us: 650-830-8140