How to Create and Manage Audiences

The “Audiences” functionality is, at its core, the permissions capability within Kim Document. It defines who can see, access, and edit applications and/or records.

Creating an Audience

- From your Workspace click on 'Settings' at the bottom of the left navigation menu and then select 'My Audiences'.

- Click on 'Add Audience', enter the relevant audience’s name, the description and click on ‘Add’.

- It is important to note that the:

  - **Default Audience** is created automatically when a user registers with Kim Document. The default audience cannot be deleted except in instances when a user deletes their account.

  - **Audience for a record** includes the user who created that record, any application audience owners and co-owners, and any users that have been invited from the ‘Share’ action on the record’s menu.

Managing an Audience

- A user who is added to an audience needs to be assigned one or more of the following roles within the audience group:

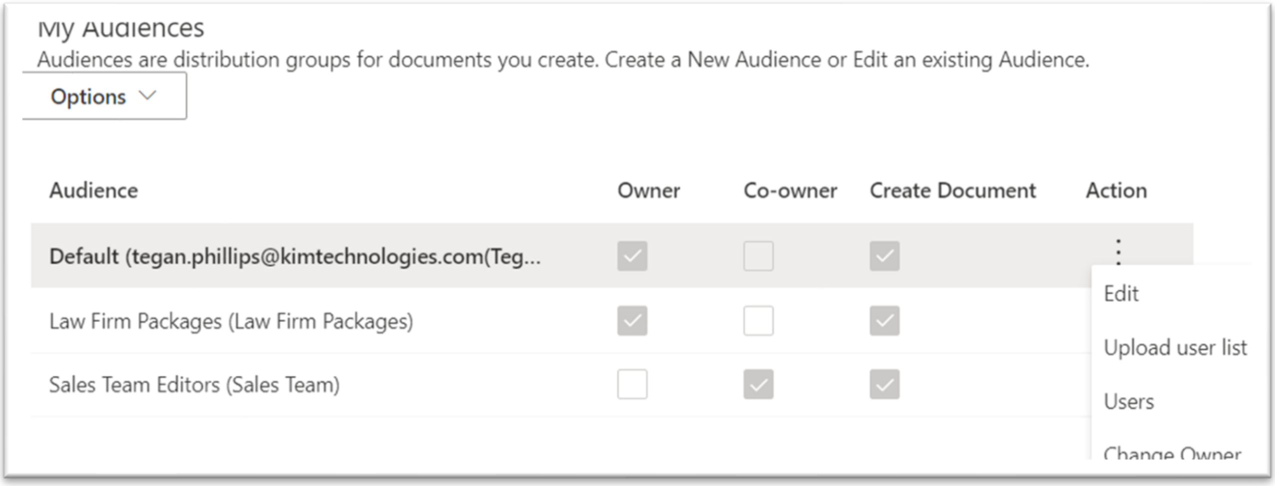
  1) “**Co-owners**” - Audience members who can fully manage an application (upload, update, delete etc.), upload lists, manage signatures and other aspects of an application.

  2) “**Create Document**” are those members who are granted the ability to fill in the

documents/forms that have been created by the Owner or Co-owners and can manage the records that have been created.

3) “**Owner**” is applied automatically for a user who created the application and gives them full access abilities.

- By clicking on the 3 dots under the Action column, you can carry out various actions for each audience including editing the audience, uploading a user list for the audience, editing users, and changing ownership:

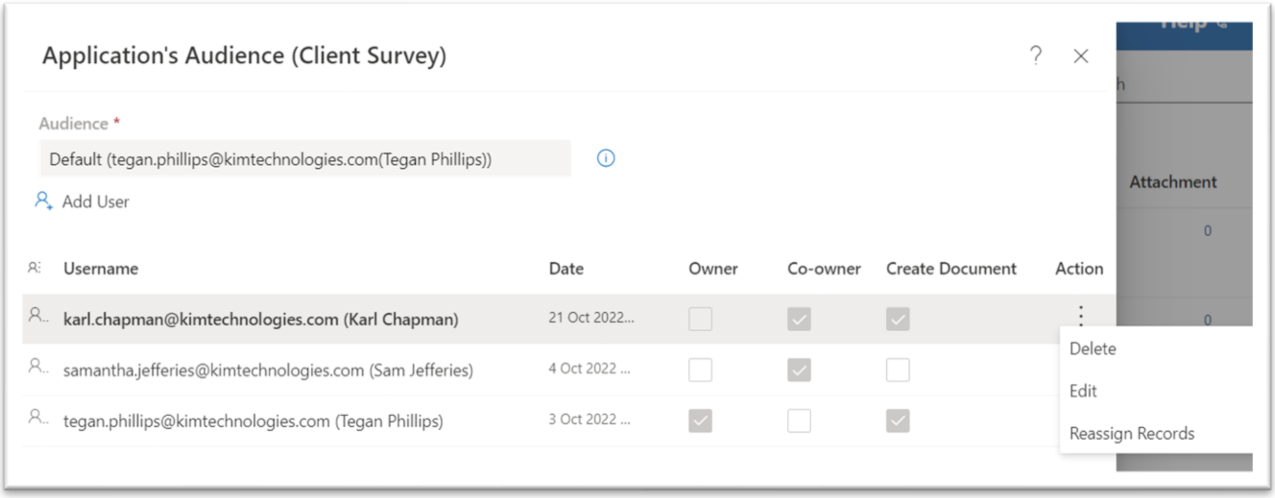


Setting an Applications Audience

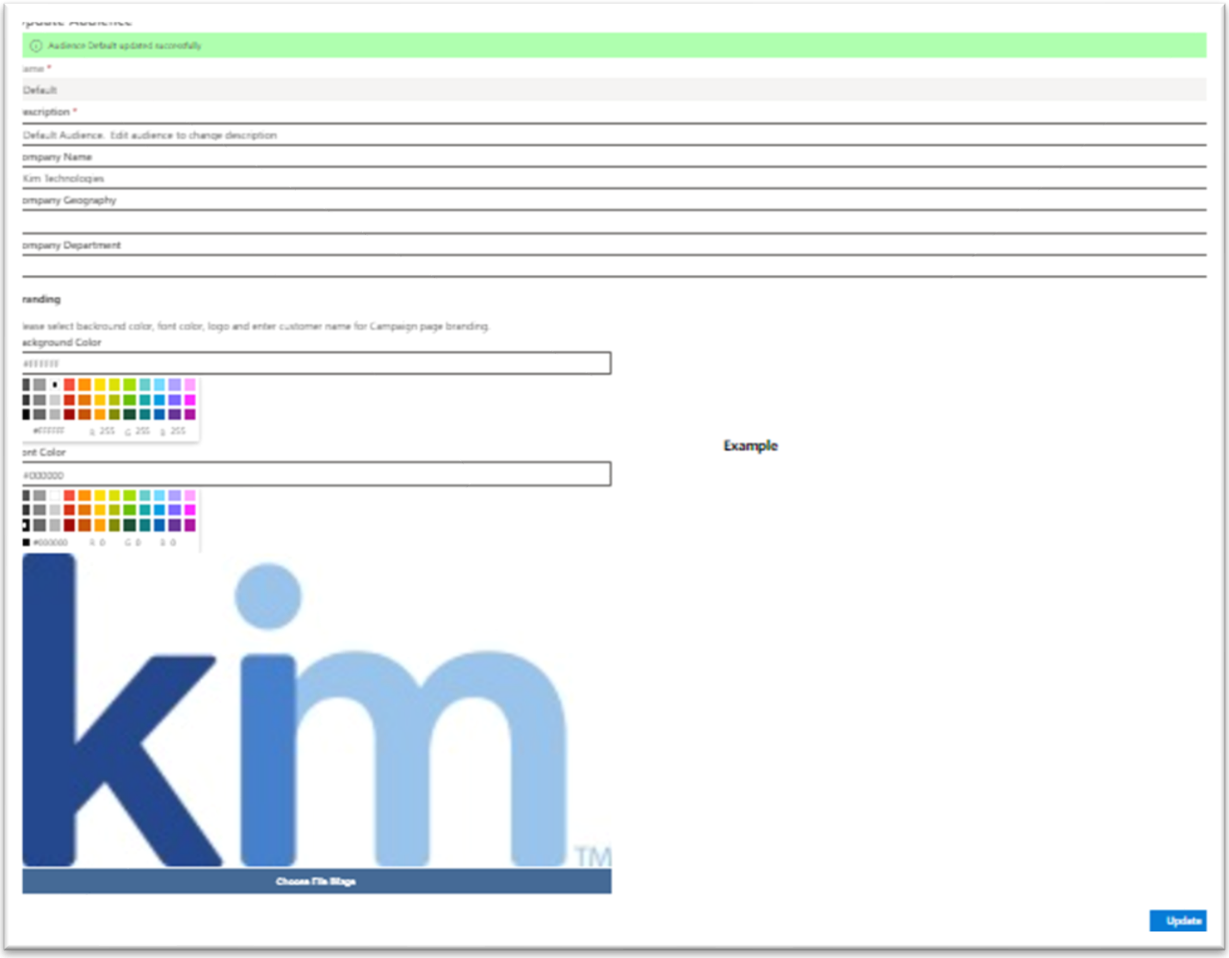
Each application that is created must have a corresponding audience applied to it. Upon creation of an application, you will be prompted (as detailed in the Help Guide) to confirm the relevant audience.

When accessing “Audience” via the application (by clicking on the applications 3 action dots), you can carry out various actions including:

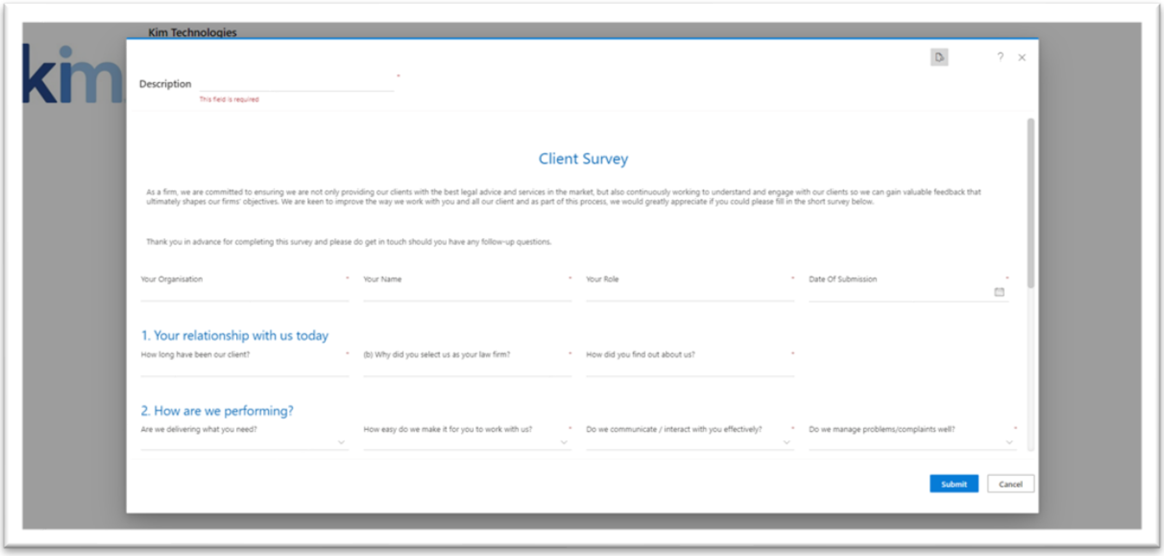
- Adding a new audience member;
- Setting of Owner, Co-Owner, Create Document status;
- Deleting users;
- Editing users;
- Reassigning records; and
- Configuring the Audiences brand settings (See below for further details).



- When the information button is clicked on next to the Audience name above, the following page appears:



Here you can edit the details of the audience but also upload a logo or any other form of branding. This will populate the branding in the background page of forms that have been sent via links through campaigns or emails.


Kim Technologies
Description
This field is required
Client Survey
As a firm, we are committed to ensuring we are not only providing our clients with the best legal advice and services in the market, but also continuously working to understand and engage with our clients so we can gain valuable feedback that ultimately shapes our firms' objectives. We are keen to improve the way we work with you and all our client and as part of this process, we would greatly appreciate if you could please fill in the short survey below.
Thank you in advance for completing this survey and please do get in touch should you have any follow-up questions.
Your Organisation
Your Name
Your Role
Date Of Submission
1. Your relationship with us today
How long have been our client?
(b) Why did you select us as your law firm?
How did you find out about us?
2. How are we performing?
Are we delivering what you need?
How easy do we make it for you to work with us?
Do we communicate / interact with you effectively?
Do we manage problems/complaints well?
Submit
Cancel