

# ACTEC Software Survey

## Technology in the Practice Committee

**Reviewer Name**

Lois Ann Stanton

**Date (mm/dd/yyyy)**

02/05/2018

**Operating System**

Windows 10

**Software being reviewed:**

HotDocs

**Version Number, if any:**

11.2.1

**Vendor Name:**

AbacusNext

**Vendor URL:**

www.hotdocs.com

**How long have you used the software?**

	Demo only	Less than 1 year	1-3 years	4-6 years	7-9 years	10+ years
Software usage	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**How satisfied are you with the software?**

	Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
Quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Customer support	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ease of Use	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

**Overall, does this software meet your needs?**

- Yes  
 Somewhat  
 No

**Have you used any software in the same category? If so, please include name:**

HotDocs is our firm's first venture to document automated assembly software. Prior to this time we had used "search and replace" features in Word.

**Please provide a substantive review of this software below.**

Our firm hired Affinity Consulting Group as our programmer to take our core documents and feed them into HotDocs. I worked closely with the programmer to identify the variables, the questions that our lawyers and/or assistants would answer to assemble the correct document. We did not do the actual programming so I cannot speak to how easy or hard that part of the journey may be.

We did write our questions and identify our variables with the programmer. After the initial product we conducted a few months of testing with a limited group to identify areas where the assimilation process was not pulling the correct language. This test period, in my opinion, is critical as you cannot identify where the problems are until you use real tests.

The questionnaire is a Word document and is accordingly easy to change as you identify areas where your initial question didn't quite make sense to others. You can either answer the questions on screen or you can do it hard copy and have someone else enter the answers. The questions you see expand and contract based on your answers as you go through the process.

You enter the key family information (or important person/entity information) one time and it is then used for all of your estate planning, trust and disability documents.

I rated Customer Support as neutral because our programming company dealt directly with HotDocs so I do not have personal information about it.

HotDocs does not work well inside ProLaw which is our document management system. We generate the HotDocs Word document outside ProLaw and drag the Word document into ProLaw. It works very efficiently that way.

We are very pleased with the program and continue to add documents to our library.

Please return your completed survey to  
Karen Stockmal at [karen.stockmal@kmslawoffices.com](mailto:karen.stockmal@kmslawoffices.com).

All surveys will be reviewed before being submitted  
for publication on the private side the ACTEC website, [www.actec.org](http://www.actec.org).