

AI DOCUMENTS

Your first document

SUMMARY:

This document describes how you can create new documents, such as employment contracts, in Ubidogy.

It is a basic document in which many functionalities are not described.

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Ubidogy A/S

Written by: Søren Agerbo Frydensbjerg



 **UBIDOLOGY**

Klamsagervej 358230

Åbyhøj

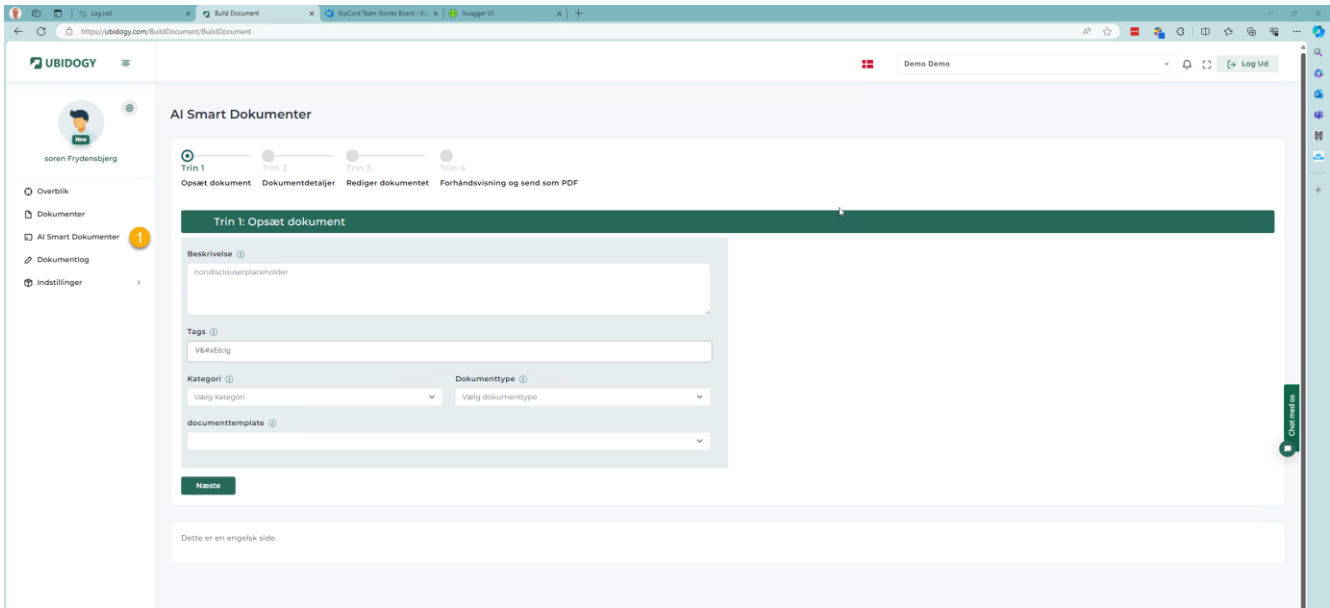
info@ubidogy.com

ubidogy.com

Background

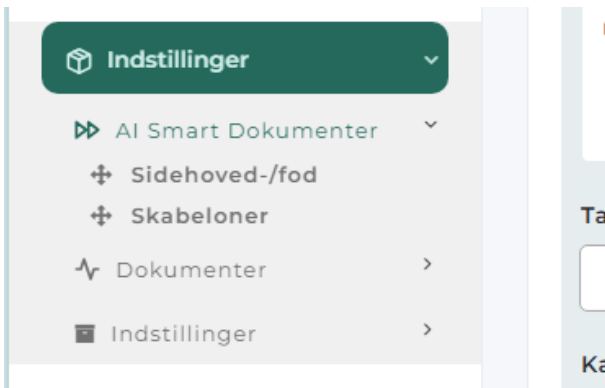
With AI Smart Documents, you can build pdf documents for signature.

The functionality can be found under the menu item AI Smart documents



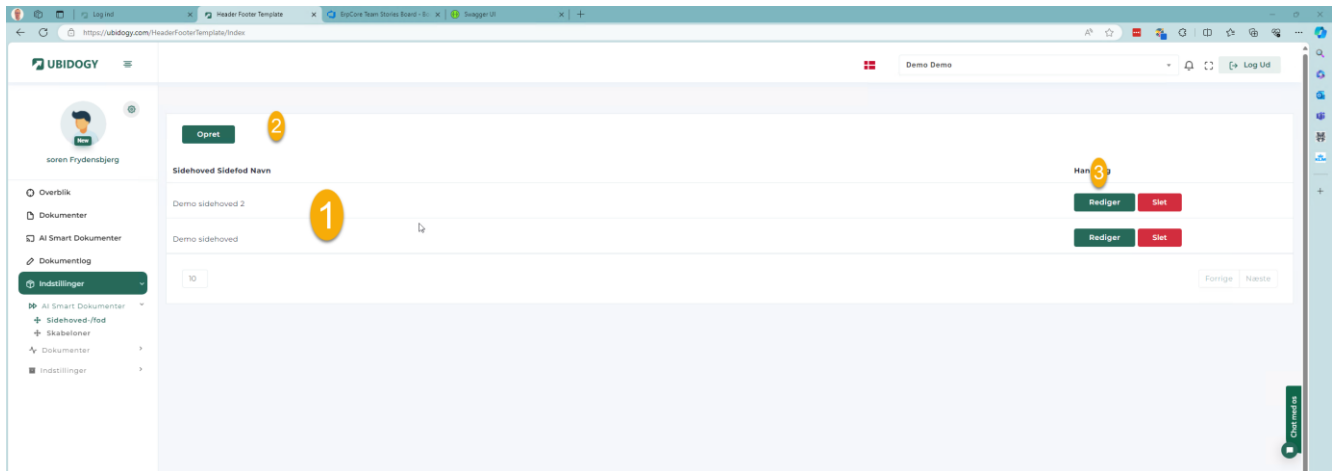
Before this is done, we look at the things that need to be configured once to get started.

Required setup



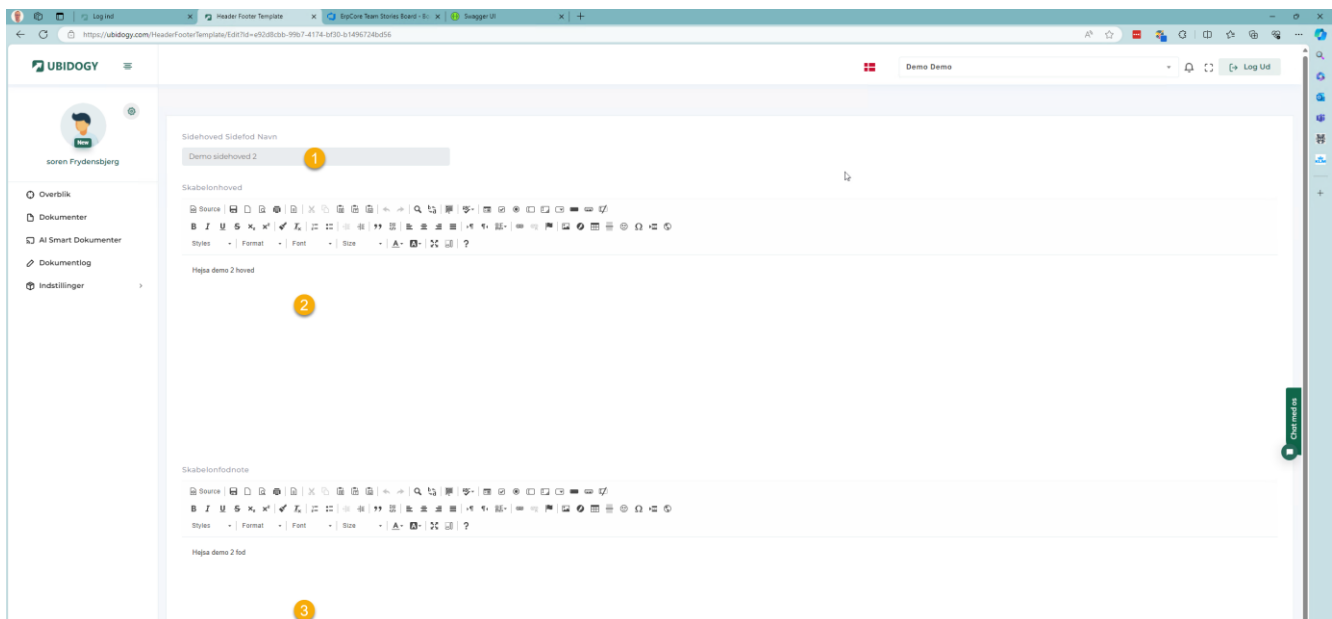
Under settings → AI Smart Documents, you can create header/footer and templates.

If you first select the header/footer, you will get the following screen:



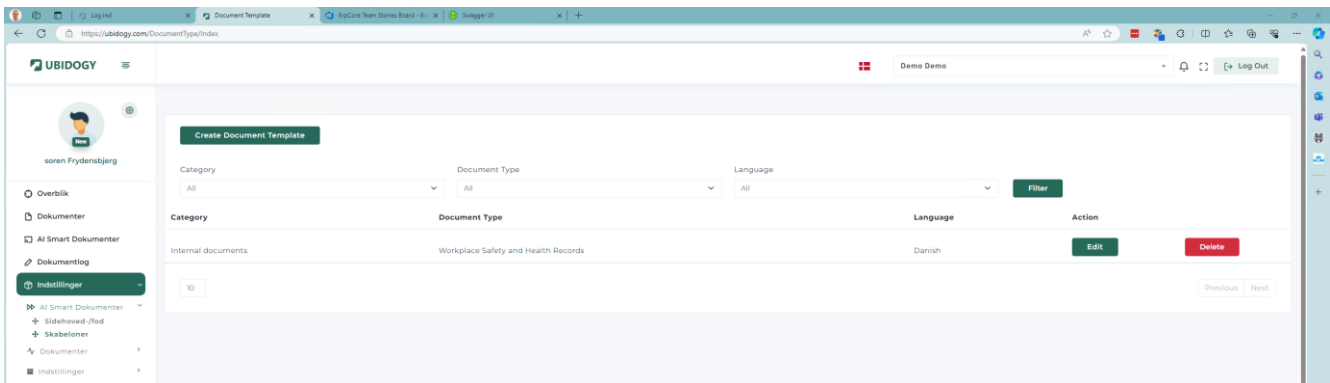
- 1) Headers you've created
- 2) If you want to create other headers/footers
- 3) Edit an existing header/footer.

When you create a new one or edit, you get the following screen:

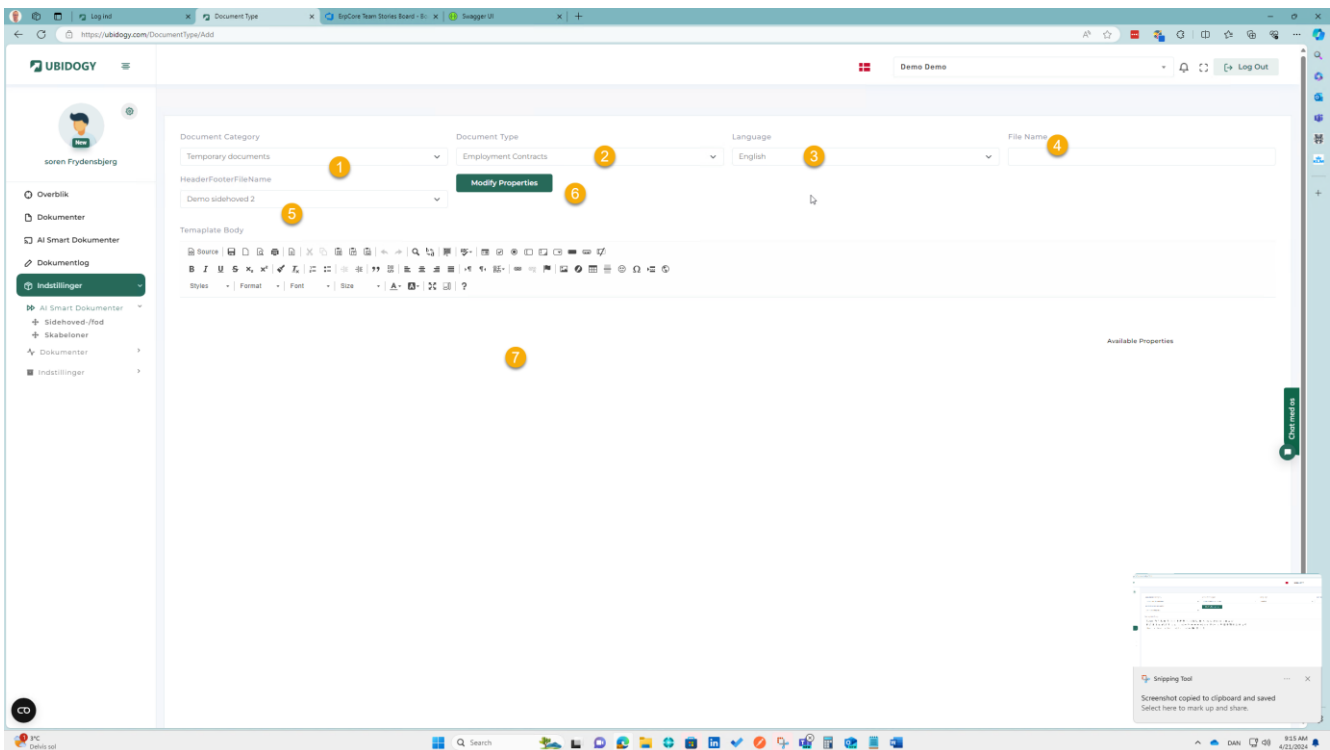


- 1) Name. Can only be changed upon creation.
- 2) HTML editor to create header
- 3) HTML editor to create footer.

If you choose Templates instead of Header/Footer, the following screen appears:



Select Create or edit to work with a document.



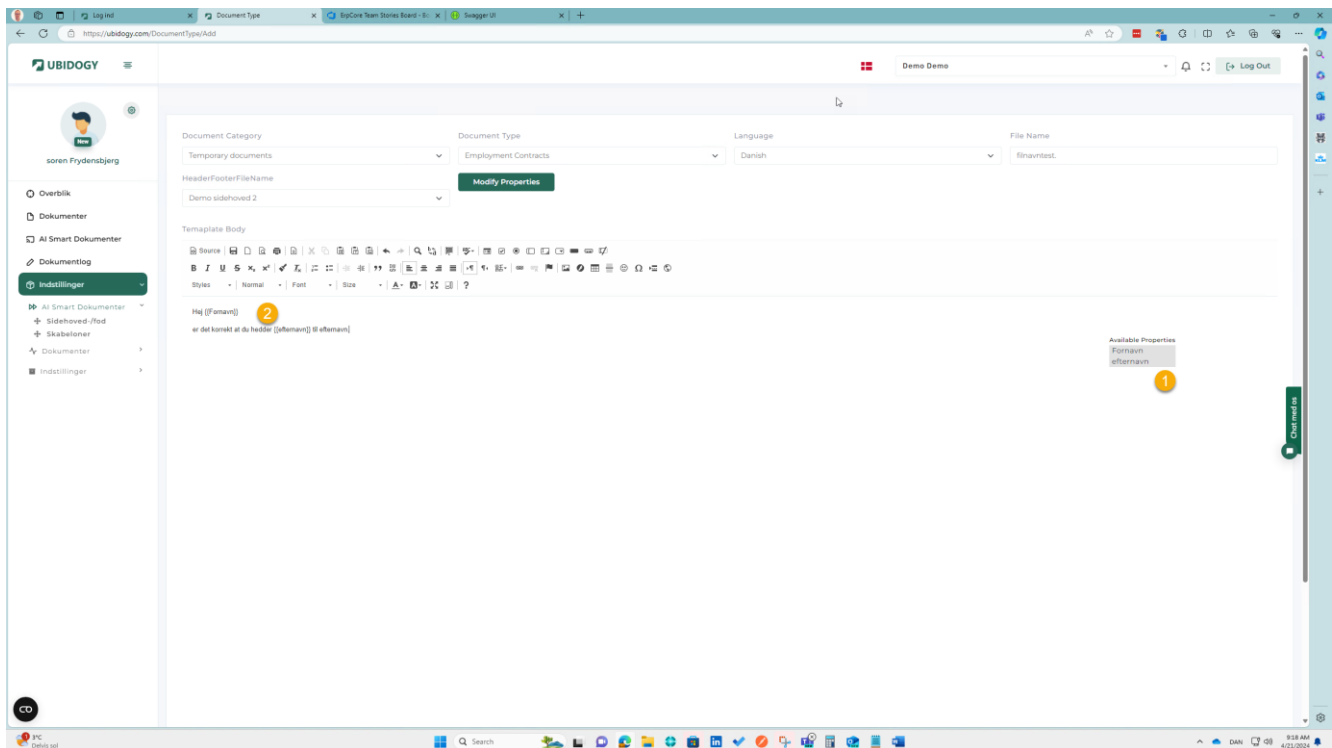
- 1) Fill in Document Category
- 2) Fill in the Document type
- 3) Fill in Language
- 4) Set a file name to send
- 5) Select the header (the ones you just made now).
- 6) Create Properties
- 7) Fill in text.

In order to make an AI Smart document vivid and useful, some properties need to be created.

I've chosen Modify, and then I've created two properties (First Name and Last Name):



I select close, and now I can see the two properties made in the document.

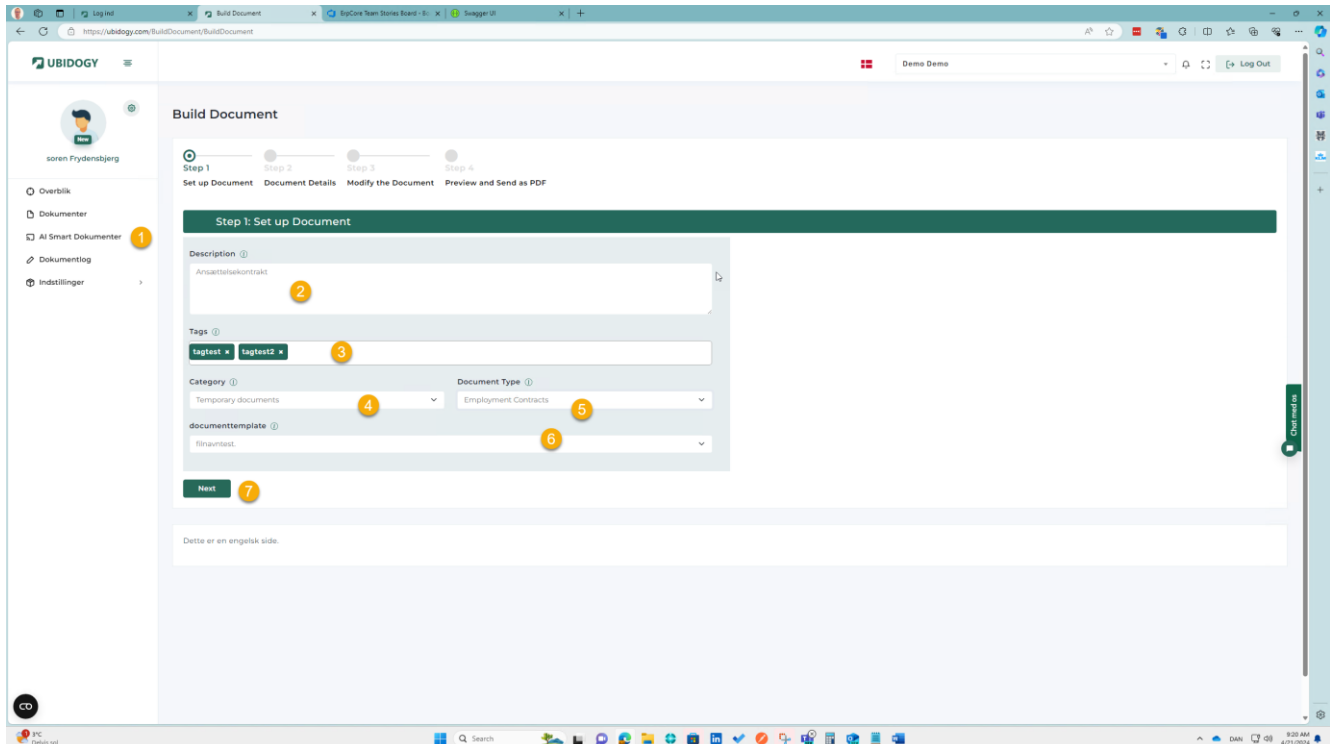


I insert them into the document by pressing them with the mouse.

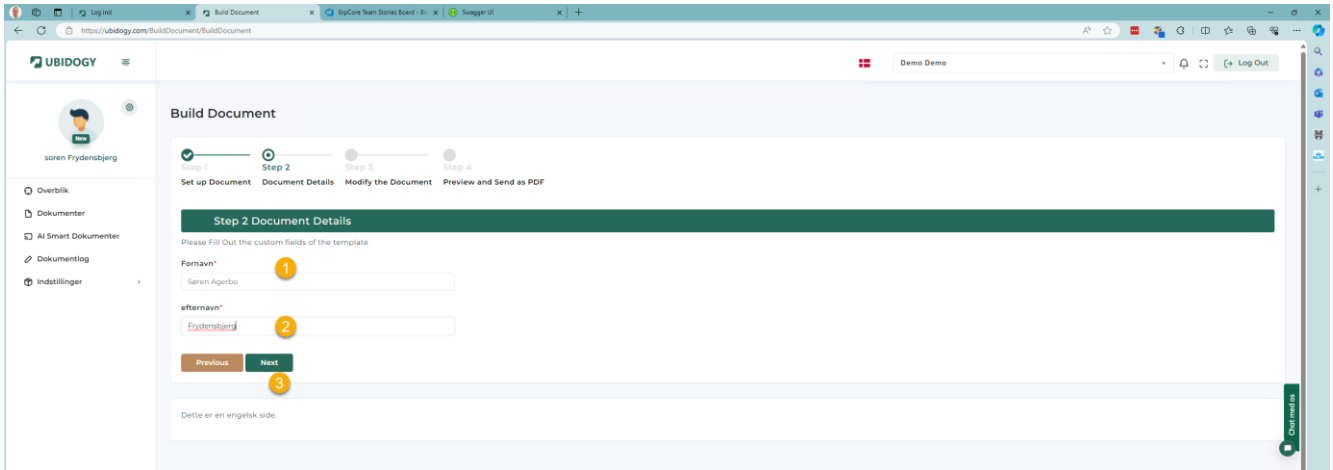
A head/footer template and template have now been created, and I am now ready to create a document.

Create AI Smart Document

Once the setup is done, you can create an AI Smart Document.



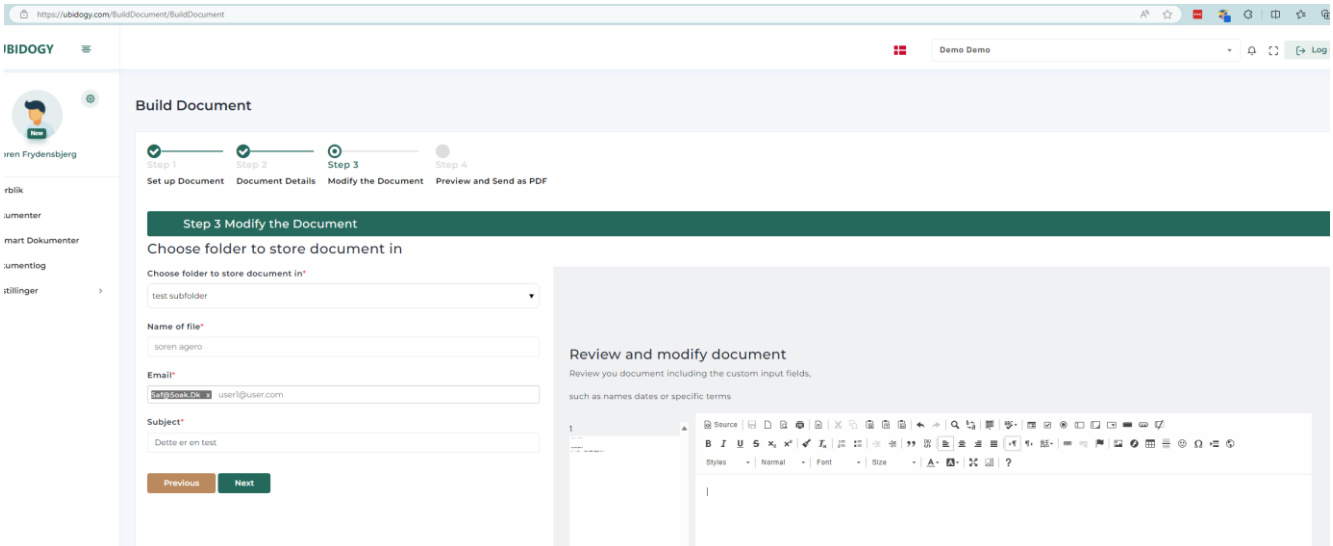
- 1) Select AI Smart Document
- 2) Make a short description
- 3) If necessary, attach tags
- 4) Select Category
- 5) Select Document type
- 6) Choose your template
- 7) Press Next.



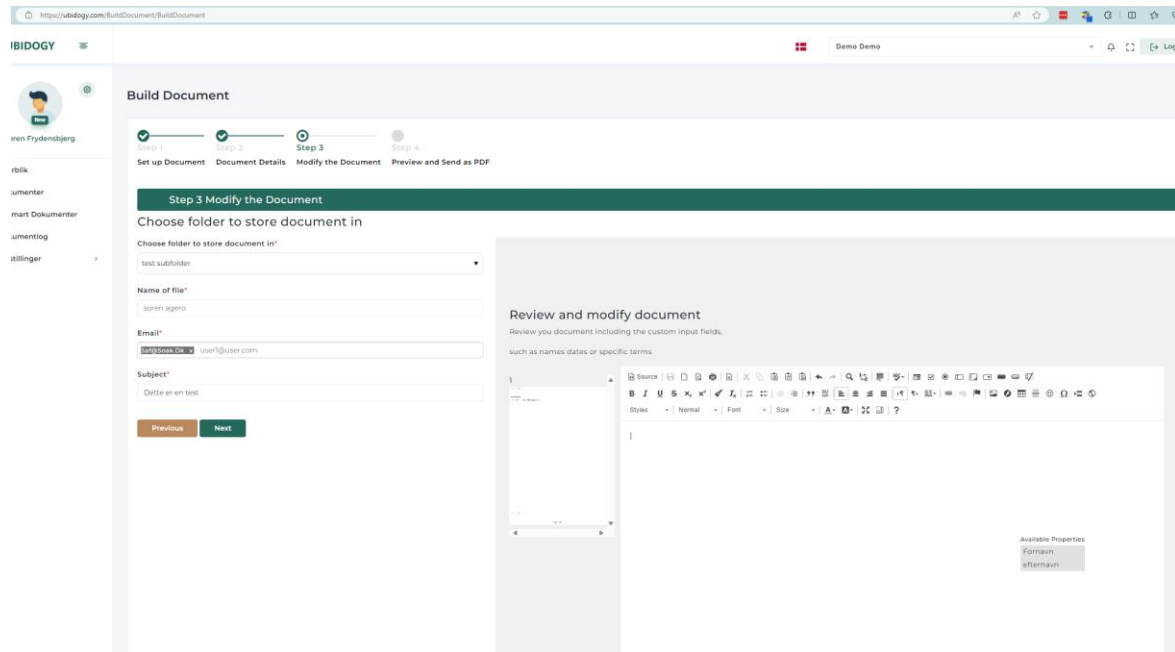
- 1) Fill in First Name
- 2) Fill in last name
- 3) Press Next

Note that the first name and last name will be different for those who use the system, as it depends on the template you have made.

You can now Review and tell where to place the document etc.



Press Next to get to View & Send as PDF.



Press send and you've created the first AI Smart document.

Then follow a normal signing process (after sending signing).