



How to use "Prefill Campaign" functionality

Send forms to users with prepopulated data that you want them to confirm, update and / or add to.

This Video



Kim's "Campaign" functionality lets you set up data capture Webforms for one-to-many distribution. It is designed for easy capture of new data.

"Prefill Campaign" functionality enables you to pre-populate the campaign Webforms with existing data you hold in other systems.

Rather than sending blank Webforms and asking users to add data, you can now send Webforms with data you already have and ask recipients to confirm, amend, or add data to the Webform.

Kim Document

demo.kimdocument.com

HelpTegan Phillips

Get Started

Examples

Applications

Prefill Campaign

HR Update Form

Welcome

HR Update Form

Set up your Application in the normal way.

Update Your HR Record

As we transition to a new HR system, we want to make sure that there is no interruption to your salary being paid to your account. We are also taking the opportunity to make sure that you are added correctly to all our core systems, from HR to compliance, and that we have all your contact details in case of an emergency. Please provide the details below. This information is treated by Kim as sensitive and strictly confidential. It is managed in line with our data security and privacy policies (please see the company handbook). If you have any questions, please contact hrsystems@kimtechnologies.com

1. Your Name

(i) First Name

(ii) Middle Name or Initial

(iii) Last Name

2. Your Address

(i) House No, / Name

(ii) Street

(iii) City

(iv) Zip / Post Code

Submit

Cancel

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Get Started
Examples
Applications
Select an Application and fill out the form

Assigned 0 Records Draft

Search

Subject Activity Note Attachment Version Action

^ Prefill Campaign

HR Update Form

Campaign

Clone
Delete
Download
Export
Properties
Publish Webform Link
Update
Version
Wizard

+ kim 3 New Appli...
Settings

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Select "Campaign" from the Application's action menu.

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Applications
Select an Application from the category and fill out the form.

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kim New Appli...
Settings 8.1.3

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Campaign List

Create new campaign

New Campaign

+ Campaign Configuration Kim Document Email Integration

Name	Description	Begin Date	End Date	Respondent...	Active	Date Created	Action
HR Update Form	Transition to n...	11 Mar 2024	31 Mar 2024	0%	<input checked="" type="checkbox"/>	11 Mar 2024	⋮

Click "New Campaign."

Close

Fill out the fields and tailor your initial and reminder emails, activate and "Update Campaign" (see separate 'Create Campaign' video).

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Edit Campaign

☒ Please activate this campaign by (i) ticking the box and (ii) selecting 'Update Campaign' at the bottom

General

Campaign Name *
HR Update Form

Campaign Description *
Transition to new HR system

Campaign Email Owner *
tegan.phillips@kimtechnologies.com

Campaign Start Date (Optional)
11 March 2024

Campaign End Date (Optional)
31 March 2024

Return URL (Optional - see tooltip for more information)
[https:// info.kimdocument.com/digital-transformation](https://info.kimdocument.com/digital-transformation)

Initial Email Subject *
Update Your HR Record - Kim Confidential CUSTOMER EXAMPLE

Buttons: Update Campaign, Send Reminders, Restart Campaign, Close

Click "Prefill Campaign."

?

×

General

Respondents/Status

Prefill Campaign

Campaign Description *

Transition to new HR system

Campaign Email Owner *

tegan.phillips@kimtechnologies.com

Campaign Start Date (Optional)

11 March 2024

Campaign End Date (Optional)

31 March 2024

Return URL (Optional - see tooltip for more information)

https://info.kimdocument.com/digital-transformation

Initial Email Subject *

HR Record - Kim Confidential CUSTOMER EXAMPLE

Body (Important - Do not remove [\$tags])*

Default Email

B

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🔗

🌟

Normal

↶

↷

Hello [\$userFirstName],

Update Campaign

Send Reminders

Restart Campaign

Close

The screenshot shows the 'Edit Campaign' window in the Kim Document application. The left sidebar contains a menu with 'General', 'Respondents/Status', and 'Prefill Campaign' (which is selected). The main content area is titled 'Prefill Campaign' and contains a 'Get Specification' button highlighted with a yellow box. A yellow arrow points from the callout box to this button. The background shows the main application interface with a top navigation bar and a sidebar.

Read the guidance and click "Get Specification". This will download the XLS with all the data points for the selected Application.

Edit Campaign

- General
- Respondents/Status
- Prefill Campaign**

Prefill Campaign

This functionality allows you to use data from other systems (e.g. Salesforce, Workday, SAP, ServiceNow ...) to prefill the campaign forms that you send out to individuals so that they can confirm that the data is accurate and/or so that they can update it and/or add new information. Simply:

Get Specification xls

1. Use the **'Get Specification'** button to download the data points (in xls format) for the form that you have set-up in Campaigns.
2. Complete the xls with the data that you want an individual recipient to confirm, update and/or, add to (**NOTE** Column B (Description) is optional and you may not have all the data for an individual recipient and if not, there will be data gaps in this xls which is not an issue).
3. Use the **'Upload'** button upload the completed xls.

+ Upload User xls

4. Select **'Respondents/Status'** from the left-hand menu.
5. Select **'+ Upload User List'** and download the 'Example List' xls.
6. Populate the **'Example List'** xls with the email addresses and first and last names of recipients that were contained in the **'Get Specification'** xls in step 2 above - 'Phone Number' is optional (**NOTE** you may want to provide this xls to any colleague that is filling in the 'Get Specification' xls so they can complete both).
7. Upload the xls via the 'Choose File' (**NOTE when you upload this xls the Campaign will be sent out so only complete this step when all other elements of the campaign are set up**).

The screenshot shows a web browser window displaying a spreadsheet application. The interface includes a top toolbar with various icons for editing and formatting, such as 'Paste', 'Clipboard', 'Font' (with options for Bold, Italic, Underline, and text color), 'Alignment' (with options for text alignment and 'Merge & Center'), and 'Number' (with a percentage icon). Below the toolbar is a formula bar with a dropdown menu showing 'H5' and a formula input field. The main area of the browser displays a table with the following data:

FirstName	MiddleNameorInitial	LastName	HouseNoName	AddressStreet	AddressCity	AddressZipPostCode	State	Country
Tegan	A	Phillips	1	The Street	Ontario	KOJ 9Z9	Central	Canada
Karl	B	Chapman	2	The Road	Cambridge	CA3 4ZZ	Cambridgeshire	England
Sam	C	Jefferies	3	The Lane	London	SW4 6GN	Middlesex	England

At the bottom of the spreadsheet, there is a yellow box containing the following text:

Populate the data fields in the XLS and save the document. Please note that 'Description' is an optional field.

Once you have entered the required data in the XLS, click "Upload."

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Prefill Campaign

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2. Complete the xls with the data that you want an individual recipient to confirm, update and/or, add to (**NOTE** Column B (Description) is optional and you may not have all the data for an individual recipient and if not, there will be data gaps in this xls which is not an issue).
3. Use the 'Upload' button to upload the completed xls.

Number' is optional (**NOTE** you may want to provide this xls to any colleague that is filling in the 'Get Specification' xls so they can complete both).

7. Upload the xls via the 'Choose File' (**NOTE when you upload this xls the Campaign will be sent out so only complete this step when all other elements of the campaign are set up**).

Campaign Specification file downloaded successfully!

Upload Download

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Edit Campaign

General

Respondents/Status

Prefill Campaign

Get Specification

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filling in the 'Get Specification' xls so they can complete both).

7. Upload the xls via the 'Choose File' (**NOTE** when you upload this xls the Campaign will be sent out so only complete this step when all other elements of the campaign are set up).

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Once you have uploaded your Specifications under "Prefill Campaign", click "Respondent/Status" to upload your campaign recipient XLS list.

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Examples
Applications
Select an Application from the category and fill out the form.

^ Prefill Campaign
HR Update Form

^ Welcome

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Edit Campaign

General Respondents/Status Prefill Campaign

Upload User List + Add + Delete Respondents

Search

☒ All ☐ Incomplete ☐ Complete

Username	Name	Phone(Optional)	Date Completed	Date Sent	Action
----------	------	-----------------	----------------	-----------	--------

Click "Upload User List."

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Edit Campaign

General
Respondents/Status
Prefill Campaign

Upload Respondent List

Example list

- The moment you Upload a User List or Add Users they will immediately receive an email to participate in the Campaign so please make sure that you have taken all other actions before completing this step
- Lists are limited to 2000 rows.
- Lists must be a CSV text file.
- Lists must be maximum size 500 KB.
- Lists must be in our specified format. Click link for example.
- Phone numbers are optional.

Choose File

Date Sent Action

Attachment Version Action

Download the "Example list" in XLS format containing the data points you need to input.

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Populate the data fields in the XLS and save the document. Please note that the Phone Number data field is optional.

	A	B	C	D
1	Username	FirstName	LastName	PhoneNumber
2	tegan.phillips@kimtechnologies.com	Tegan	Phillips	0207 123 4567
3	karl.chapman@kimtechnologies.com	Karl	Chapman	0207 234 5678
4				
5				
6				
7				

Once you have entered the required data into the XLS, click "Choose File" and upload the XLS.

The screenshot shows the 'Kim Document' web application interface. The main page is titled 'Edit Campaign' and has a sidebar with 'Get Started', 'Examples', and 'Applications'. A modal window titled 'Upload Respondent List' is open in the center. It contains a green notification bar at the top stating 'Example successfully downloaded. Please check Downloads folder!'. Below this is a section titled 'Example list' with a list of instructions: 'The moment you Upload a User List or Add Users they will immediately receive an email to participate in the Campaign so please make sure that you have taken all other actions before completing this step', 'Lists are limited to 2000 rows.', 'Lists must be a CSV text file.', 'Lists must be maximum size 500 KB.', 'Lists must be in our specified format. Click link for example.', and 'Phone numbers are optional.' At the bottom of the modal, there is a 'Choose File' button highlighted with a yellow box and an 'Upload' button. A yellow arrow points from the 'Choose File' button to the 'Example list' section. The background interface includes a top navigation bar with 'Help' and 'Tegan Phillips', and a bottom status bar with 'Kim Document - Copyright 2024'.

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Get Started

Examples

Applications

Select an Application from the category and fill out the form.

Edit Campaign

General

Respondents/Status

Upload Respondent List

Example successfully downloaded. Please check Downloads folder!

Example list

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Choose File

Upload

Date Sent

Action

Attachment

Version

Action

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Edit Campaign

General
Respondents/Status
Prefill Campaign

Upload Respondent List

Example list

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- Lists are limited to 2000 rows.
- Lists must be a CSV text file.
- Lists must be maximum size 500 KB.
- Lists must be in our specified format. Click link for example.
- Phone numbers are optional.

Choose File Example (2).csv Upload

Click "Upload."
Please note that uploading the file will automatically trigger the first campaign email to the recipients if the campaign is active.

Recipients receive the email you tailored in Kim. After authenticating (via an access code sent separately or SSO) the user sees their Webform with their data. They review, amend and/or add as required and submit.

make sure that you are added correctly to all our core systems, from HR to compliance, and that we have all your contact details in case of an emergency. Please provide the details below. This information is treated by Kim as sensitive and strictly confidential. It is managed in line with our data security and privacy policies (please see the company handbook). If you have any questions, please contact hrsystems@kimtechnologies.com

1. Your Name

(i) First Name

Tegan

(ii) Middle Name or Initial

A

(iii) Last Name

Phillips

2. Your Address

(i) House No. / Name

1

(ii) Street

The Street

(iii) City

Ontario

(iv) Zip / Post Code

KOJ 9Z9

(v) State / County

Central

(vi) Country

Canada



Submit

Cancel

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Get Started
Examples
Applications
Select an Application from the category and fill out the form.

▼ Prefill Campaign
▼ Welcome

Assigned 1 Records Draft

Search

Subject	Activity	Note	Attachment	Version	Action
 New Record HR Update Form Prefill Campaign - HR Update Form Tegan Phillips Mar 11, 2024	Created document		0	1	

The submitter receives an email confirmation that their response has been received. You will receive each Record in your Kim Workspace.

+ kim 24 New Appli...
Settings 8.1.3

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▼ Prefill Campaign
▼ Welcome

Assigned 1 Records Draft

Search

Subject	Activity	Note	Attachment	Version	Action
 New Record HR Update Form Prefill Campaign - HR Update Form Tegan Phillips Mar 11, 2024	Created document				<div>Activity Attachment Copy Delete Download Manage Preview Renewals & Alerts (Override) Send Mail Send Webform Update Link Share Update Webform</div>

Various actions can be carried out for each record, including the ability to preview the document by clicking on "Preview" from the Record's action menu.

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Kim Document

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Help

Tegan Phillips

Get Started

Examples

Applications

Prefill Campaigns

Welcome

Document Preview (HR Update Form)

Preview of the document.

200%

1 / 2

emergency.

Please provide the details below. This information is treated by Kim as sensitive and strictly confidential. It is managed in line with our data security and privacy policies (please see the company handbook).

If you have any questions, please contact lisa.giacone@kimtechnologies.com

Information required	Response
1. Your Name	
First name	Tegan
Middle name or initial	A
Last name	Phillips
2. Your Address	
House number / name	1
Street	The Street
City	Ontario
Zip/Post Code	K0L 0Z0


kim

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Settings



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Get Started
Examples
Applications
Select an Application from the category and fill out the form.

▼ Prefill Campaign
▼ Welcome


Assigned  1 Records  Draft

Search


Subject Activity Note Attachments

0

You can also download all the data entered for the Application. Select "Bulk Download" under your profile.



My Billing Plan
My Profile
My Activity
Privacy Policy
Terms and Conditions
Data Processing Agreement
Get Support/Contact Us
Log Out

+  ²⁸ New Appli...
Settings 8.1.3

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Select the relevant campaign under "Campaign."

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Get Started Examples Applications

Select an Application from the category and fill out the form.

▼ Prefill Campaign

▼ Welcome

Subject

New Record

HR Update Form

Prefill Campaign - HR Update

Tegan Phillips

Mar 11, 2024

Attachment Version Action

0 1

Bulk Download

Application

Prefill Campaign - HR Update Form

Filter records by Campaign.

Campaign

HR Update Form(March 11, 2024)

Created from To

Select a date Select a date

Updated from To

Select a date Select a date

Download Delete Close

kim 32 New Appli...

Settings 8.1.3

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Enter the date, if required, and click "Download."

Bulk Download ? x

Application
Prefill Campaign - HR Update Form

Campaign
HR Update Form(March 11, 2024) x

Download type *
☐ xml ☒ xlsx ☐ package

Created from x **To** x

Updated from x **To** x

Download **Cancel** **Close**

Click "Yes" to proceed.

Bulk Download

Application
Prefill Campaign - HR Update Form

Excel request

The Excel file will be processed and will be emailed to 'tegan.phillips@kimtechnologies.com' when completed. Download is limited to 10,000 records. If more records are needed, please use API. Do you want to proceed?

Yes **No**

Select a date Select a date

Download **Delete** **Close**

Click "Accept" to accept the submission.

The screenshot shows the Kim Document web application interface. A yellow callout box at the top says "Click 'Accept' to accept the submission." In the background, a "Bulk Download" dialog is open, showing a table with columns "Attachment", "Version", and "Action". The table has one row with "0", "1", and a vertical ellipsis. In the foreground, an "Excel request" modal is displayed with the message "Thank you. Your request has been submitted." and a blue "Accept" button highlighted with a yellow border. A yellow arrow points from the "Accept" button in the modal to the "Accept" button in the background dialog. The background interface includes a sidebar with "Get Started", "Examples", and "Applications" sections, and a top navigation bar with "Help" and "Tegan Phillips" user information.

Attachment	Version	Action
0	1	⋮

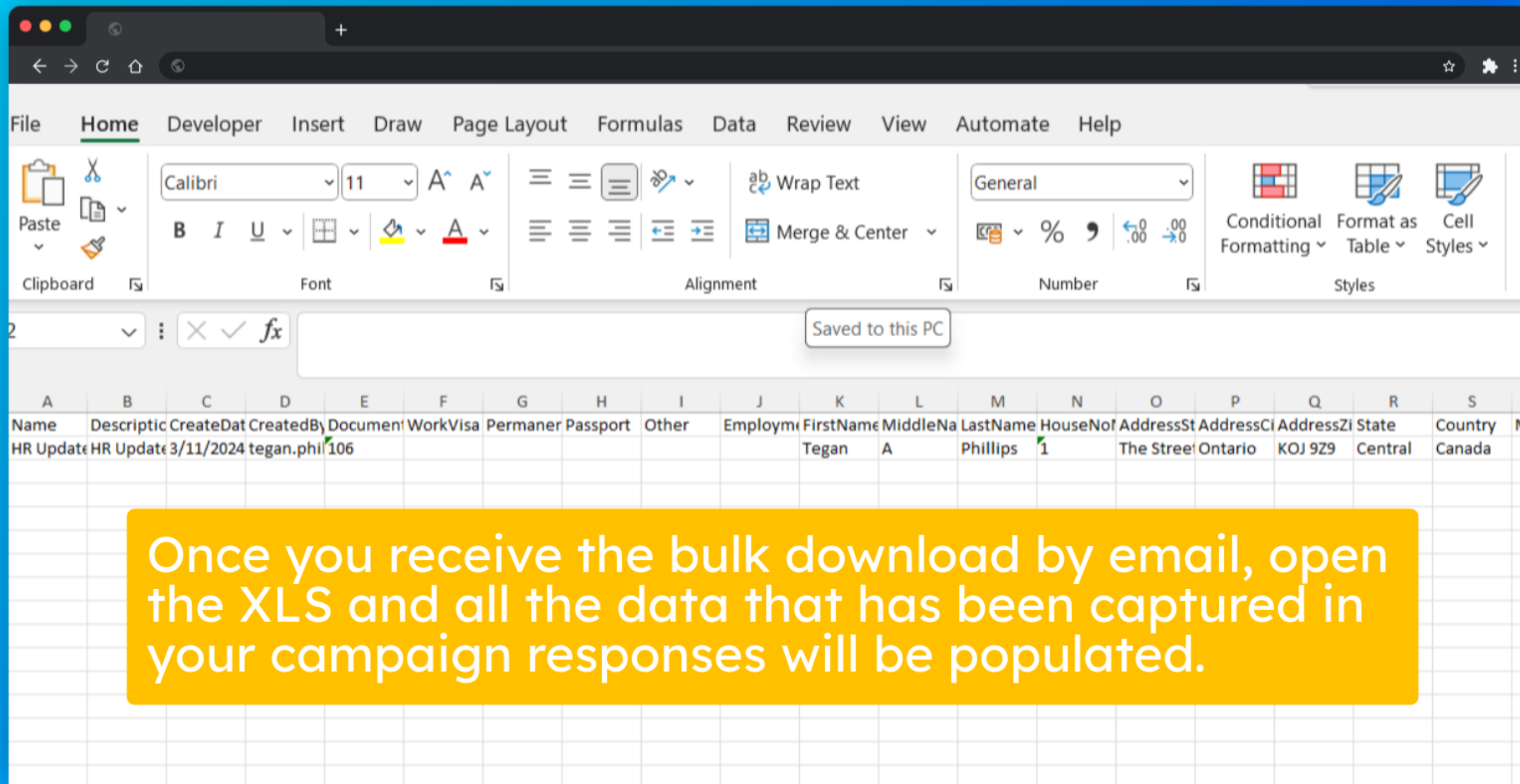
Excel request

Thank you. Your request has been submitted.

Accept

Updated from: Select a date To: Select a date

Download Delete Close



The screenshot shows the Microsoft Excel interface with the 'Home' tab selected. The ribbon includes options for Clipboard, Font, Alignment, Number, and Styles. The spreadsheet data is as follows:

Name	Descriptic	CreateDat	CreatedBy	Document	WorkVisa	Permaner	Passport	Other	Employe	FirstName	MiddleNa	LastName	HouseNo	AddressSt	AddressCi	AddressZi	State	Country	M
HR Update	HR Update	3/11/2024	tegan.phil	106						Tegan	A	Phillips	1	The Stree	Ontario	KOJ 9Z9	Central	Canada	

Once you receive the bulk download by email, open the XLS and all the data that has been captured in your campaign responses will be populated.

kim

