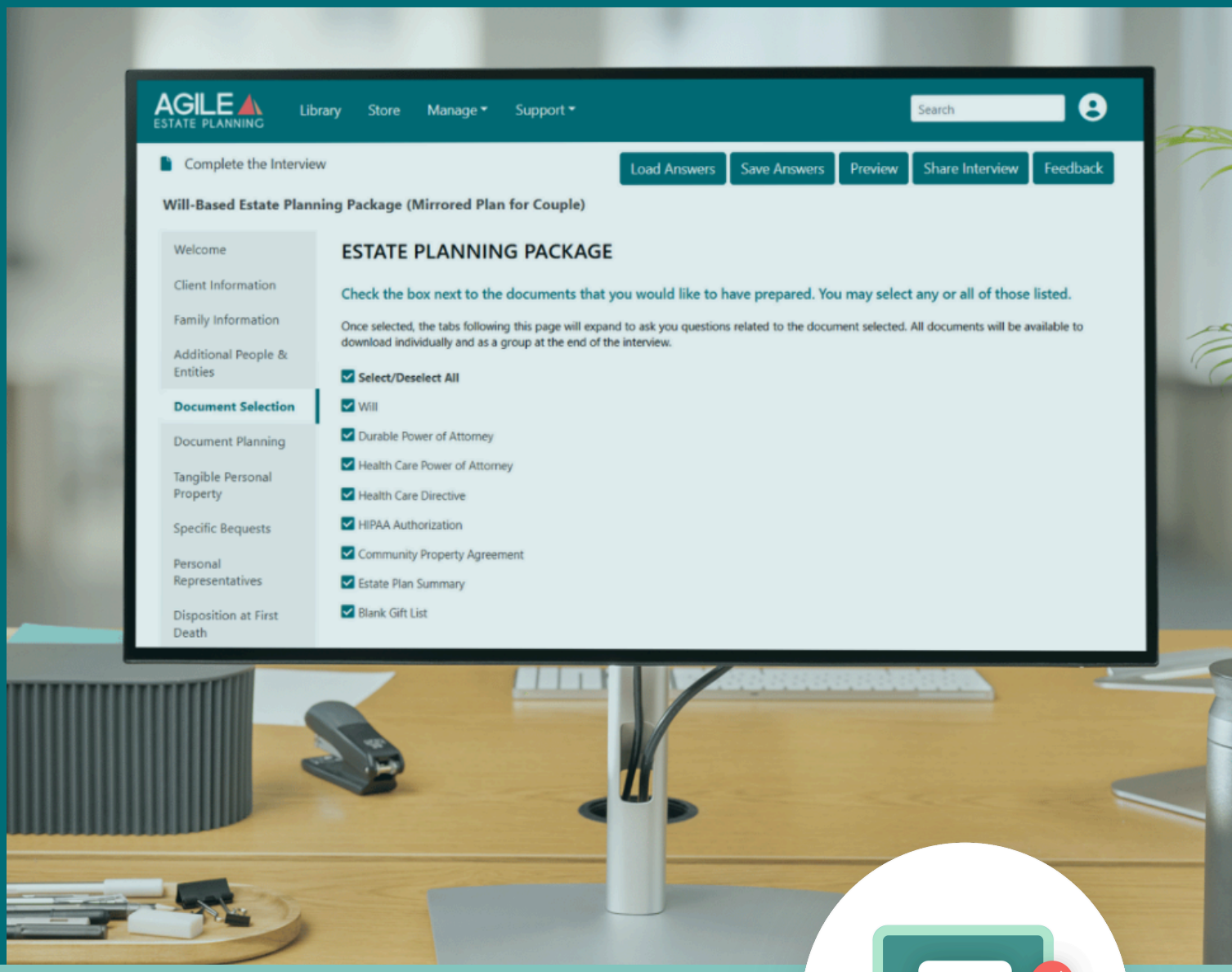
Key workflows, tips, and support resources

Agile Estate Planning User Guide



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Section 01

Purpose and Scope of This Guide

What This Guide Covers

In this guide, you will learn:

- How our software is structured and how to navigate the system
- How your subscriptions determine what products and templates you see
- How drafting works from start to finish, from selecting a template to saving your work
- Core concepts that explain why the system works the way it does

The goal is not only to show you where things are, but to help you understand how our software is meant to be used in practice.

What This Guide Does Not Cover

This guide does not:

- Teach estate planning law or provide legal advice
- Replace jurisdiction-specific drafting instructions
- Document every feature or configuration option in detail

More detailed explanations of specific templates, planning packages, and jurisdictional differences are available on our website in the Help Center.

How to Think About Agile Estate Planning

Agile Estate Planning (Agile EP) is a document drafting system, not a client or matter management platform. Drafting always begins with the documents, not with a client or matter.

Agile EP's purpose is to produce accurate, consistent estate planning and probate documents through structured drafting workflows. Keeping this document-first approach in mind will make the system easier to understand and use effectively.

Section 02

How Agile EP Is Organized

System Structure

Agile EP is organized around five core concepts:

1. Accounts
2. The Store
3. Product Subscriptions
4. The Library
5. Templates Used for Drafting

Each layer builds on the one before it. If something is missing or unavailable, the explanation can almost always be found by tracing back through this structure.

Accounts

An account represents your firm.

- All accounts have an administrator, a firm contact, and at least one user
- All users belong to an account
- User permissions and roles are managed at the account level by the administrator
- Product access and billing are tied to the account and controlled by the administrator

When you log in, everything you see and do in the system, regardless of your role, happens within the context of your account.

The Store

Every account has a Store. The Store is where you manage what products your account has access to. It is not where you draft documents or work with clients. In the Store, you can:

- View available products
- Start or manage free trials
- Subscribe to products

When a product is marked *Free Trial Active* in the Store, your account has temporary access to that product without being billed.

Section 02

How Agile EP Is Organized (Cont.)

Product Subscriptions

A product subscription unlocks a defined set of templates, typically organized by jurisdiction and practice area. Subscriptions do not themselves contain documents or questionnaires. Instead, they determine what appears in the **Library**.

The Library

The **Library** is where the templates in a subscribed product become visible and usable. When your account has an active product subscription, that product automatically appears in the Library. If a product is not subscribed, it will not appear in the Library at all.

Each subscribed product appears as its own entry in the Library. Selecting a product takes you into its templates.

If you do not see something in the Library, the first thing to check is whether the relevant product subscription is active in the Store.

Templates and Drafting Packages

Within each product subscription are **templates**, which are the actual drafting tools you use. Templates are organized into folders that reflect how they are used in practice.

Templates may be:

- Single-document templates (such as a deed), or
- Drafting packages, which assemble multiple coordinated documents into a single workflow.

Drafting packages are commonly used for estate planning and probate, and are designed to ensure that related documents—such as wills or trusts, powers of attorney, and health care documents—are internally consistent and drafted together.

Client Data

Client information entered into the drafting interview of a template is saved in an answer file. Answer files allow you to reuse client data across drafting sessions and templates.

Section 03

First Time Account Setup

Setting up your Agile EP account consists of creating your firm account and then purchasing and assigning the appropriate product subscriptions to account users.

Create the Firm Account

To begin, go to our drafting platform - **https://agile.xpressdox.com**

Create a new account using your firm information and the email address of the person setting up the account. Once the account is created and you log in, you will be directed to the **Store**.

Select a Product: Free Trial or Paid Subscription

Access to Agile EP drafting templates is controlled through product subscriptions. From the **Store**, you may either begin with a **free trial** or purchase a subscription immediately. Functionally, both options provide the same access and setup capabilities—the only difference is **when payment is required**.

Add Additional Users (If Applicable)

If more than one person at your firm will draft documents, you will need to add them as users.

- Navigate to **Manage > My Users**.
- Click **Add User**.
- Enter the user's name and email address and then click save.
- Leave the External ID field blank (it is not required).

The new user will receive an email from Agile EP prompting them to set a password for their own access to the account. Repeat these steps for each additional drafting user.

Assign Subscriptions to Users

After users have been added, subscriptions must be assigned in order to access templates in the Library.

- Navigate to **Manage > Subscriptions**.
- Locate the subscribed product and click **Assign Users**.
- Select the user from the dropdown menu to add them to the subscription.

Section 04

Required Account Settings

Before you begin drafting documents or sending questionnaires to clients, there are a few required account settings you must complete. These settings affect how questionnaires appear to clients and how documents are assembled.

Enter Firm Information and Document Settings

As an **initial step**, you should enter your **Firm Information**, including, for example, the firm's attorneys, offices and staff information. This information is used throughout the system and appears in many client-facing and assembled documents.

You can also set **optional document defaults** that apply to all documents created through your account. These settings prefill common staff, notary, witness, and page numbering details to reduce manual editing and ensure consistency across your firm's documents.

To access Firm Information, go to **Manage > Firm Information** and follow instructions on the page.

Configure Firm Account Settings

Navigate to **Manage > Settings** and complete the settings that control how data is saved, how questionnaires are shared with clients, and how your firm's branding appears in client-facing materials.

- **Allow Cloud Storage:** Check this box to enable cloud storage for all answer files
- **Enable Shared Interviews:** Check the box to be able to send online questionnaires

Both of these settings **must be enabled** for normal client-facing questionnaire workflows.

- **Choose Firm's Primary Color:** Enter a hex color code that aligns with your firm's branding for various client facing items
- **Add Firm's Logo:** Upload your firm's logo in PNG format. The logo appears in shared interviews and in assembled questionnaire outputs.

We recommend testing a questionnaire by sending it internally to confirm the look of your logo and chosen color.

Section 05

Document Drafting in Agile EP

Document drafting in Agile EP is an interactive process that begins with template selection and continues through interview completion, document preview, and document assembly. This section explains how to move through that process efficiently and intentionally.

The Drafting Workflow

Drafting in Agile EP always begins by selecting a drafting template from the **Library**. While the specific folders and templates you see depend on the products you have subscribed to, the overall approach to drafting is consistent across the system. To **begin drafting:**

- Go to the **Library**
- Select a **product** (for example, an Estate Planning product for a specific jurisdiction)
- Open the **appropriate folder**
- Select the **drafting template or package**
- If template is a package, **select documents** to draft
- **Answer** interview questions
- **Preview** documents (if desired)
- **Assemble** documents
- Revise and re-assemble as needed

All drafting interviews are dynamic. The most effective drafting approach is to work through them deliberately and in order.

Previewing Documents While Drafting

Agile EP allows you to preview documents during drafting, before final assembly. At various points in the interview, you may use the **Preview** button to:

- See how current answers affect document language
- Confirm that planning decisions are reflected as expected
- Identify missing or incomplete information early

Previewing documents requires that your **browser allow pop-ups**. If previews do not open, check your browser's pop-up settings.

Previews are an aid to drafting and review; they do not replace formal document assembly.

Section 05

Document Drafting in Agile EP (Cont.)

Assembling Documents

Document assembly is the step where Agile EP uses an answer file to generate final documents. **Documents are not assembled automatically as you answer questions.** Assembly occurs only when you choose to generate documents at the end of the drafting interview.

Step 1: Save Your Answer File
The answer file stores all interview responses for this estate plan and is required for document assembly.
On the **Assemble Documents** tab:

- Enter a File Name (a recommended name is provided and may be edited).
- Save the answer file using one of the following:
  - Click **Save Answers** on this page, or
  - Save the answer file from the Answer File Section on the **Assembled Documents** screen (**Save to Disk** or **Save to Cloud**).

Important: If the answer file is not saved here, it must be saved on the **Assembled Documents** screen to avoid losing responses.

Step 2 (Optional): Preview Documents as described above

Step 3: Assemble Documents
To generate final documents, click **Assemble Your Documents**. Agile EP generates all documents included in the selected package using the saved answer file.

After assembly:

- The **Assembled Documents** screen displays the generated documents.
- Documents may be downloaded individually or as a complete set.
- If documents do not open or download, check browser permissions.

******Answer File Reminder******
If **Save Answers** was not selected on the **Assemble Documents** tab, save the answer file on the Assembled Documents screen (using **Save to Disk** or **Save to Cloud**).

Section 06

Saving and Managing Client Data

As you work through a drafting interview in Agile EP, the information you enter is stored in answer files. Answer files are the data source used to generate documents and are central to how drafting, revision, and reuse work in the system.

Saving answers allows you to pause drafting, return later, maintain multiple versions, or separate plans by client or planning scenario. Agile EP includes a built-in **File Explorer** that lets you intentionally save, organize, and overwrite answer files.

When a client completes questionnaire, their answers also create an answer file. Access to and use of an answer file **created by a client** (instead of internally as a part of a drafting interview) is addressed in Section 08.

The File Explorer

When you click **Save Answers**, and have "Cloud Storage" enabled under **Manage > Settings**, the **File Explorer** opens. The File Explorer functions like a standard folder system and supports:

- Multiple parent folders and subfolders
- User-based organization (by checking the "**Show only my files** option")

Folder Structure

The **File Explorer** is used to organize answer files.

- Locations are the highest-level folders. Parent folders are created by highlighting **Location** and clicking the add folder icon. Each Location typically represents a firm, office, user, or other top-level organizational unit.
- **Subfolders** are created within a Location or within another subfolder.
    - To add a subfolder, select the parent folder and click the **Add Folder** icon.
- Subfolders may be nested to support additional organization.

Answer files are saved inside folders and follow the folder structure in which they are stored.

Section 06

Saving and Managing Client Data (Cont.)

Saving a New Answer File

To save a new answer file:

1. **Click Save Answers** while in the drafting interview
2. Select the highest-level folder or any folder where the file should be stored - **Do not select an existing file**
3. Enter **a name** for the new answer file when prompted
4. Click **Save**

This creates a new, standalone answer file without affecting any existing files.

Saving a new file is recommended when:

- Saving an initial draft
- Saving separate plans (for example, each spouse)
- Preserving a prior version before making changes

Overwriting an Existing Answer File

To overwrite an existing answer file:

1. **Click Save Answers** while in the drafting interview
2. Click directly on the **existing file name** in the File Explorer
3. Select **Save**
4. Confirm the overwrite when prompted

Overwriting replaces the contents of the selected file with the current interview answers.

Use overwriting when:

- Continuing work on the same plan
- Making incremental updates to an existing draft
- You are certain the prior version is no longer needed

Best Practices for Saving Answers

- Save early and often during drafting. The system will resume where you left off, but it's safer to save regularly.
- After assembling a template (document or package), **save the answer file to the cloud**. By default, downloading all assembled documents includes a copy of the answer file in the .zip file, allowing you to save it locally with the documents.

Section 07

Using Answer Files for Drafting

Existing answer files are loaded **after** you select a drafting template. Loading answers allows you to reuse previously saved client information instead of re-entering data.

How to Load an Answer File

To load an answer file:

1. Go to the **Library**
2. Select the appropriate product, folder, and drafting template
3. Choose the option to **Load Answers**
4. Select the desired answer file from the File Explorer

Once loaded, the interview will be populated with the saved responses. You may review, edit, or supplement the information as needed.

Compatibility and Loading Answers

Answer files load data only where questions are compatible.

- Matching questions are populated automatically
- Non-applicable questions are ignored
- New or template-specific questions remain unanswered

Loading an answer file does not force data into incompatible fields or alter the structure of the selected template.

Using Answer Files Across Templates

Answer files may be reused across multiple templates when the planning structure is compatible.

For example:

- A client's core information may be used in an estate planning package and then reused in a deed
- Separate answer files may be used for different estate planning scenarios or probate phase packages

If you are switching between substantially different planning structures (like a Will Plan to a Joint Revocable Trust Plan), **review loaded answers carefully** to ensure they still reflect the intended plan.

Section 08

Client Questionnaires

Client questionnaires in Agile EP are started **from their own templates** in the **Library**. They are not launched from drafting templates and do not require you to begin a document draft first.

How to Send a Questionnaire

To start a questionnaire:

1. Go to the **Library**
2. Select the appropriate **product**
3. Open the **Client Questionnaires** folder
4. Select the questionnaire **template** you want to use

Depending on the product, you may see multiple questionnaire options. These typically vary based on how much information you want to collect from the client.

Sending a Questionnaire to a Client

After selecting a questionnaire template, you will be taken into the questionnaire interview. This interview includes both internal setup steps and the client-facing questionnaire.

Choose Preferences on the Getting Started Tab

Begin on the **Getting Started** tab and follow the instructions provided. Once complete, you can click **Share Interview**.

The setup steps described on the **Getting Started** tab are for your internal use only and are not visible to the client.

Configure Recipient and Access Settings

After clicking the **Share Interview** button, you will be taken to a screen where you configure how the questionnaire is delivered and accessed. The settings on this screen apply only to this singular, shared interview.

Choose Email Method

Choose how the questionnaire is sent:

- **XpressDox Email** sends the questionnaire directly from the Agile EP system.
- **Outlook** opens a pre-populated email you can review and send.

After the questionnaire is sent, no further action is required until the client completes it.

Section 08

Client Questionnaires (Cont.)

Customize the Client "Invitation Email"

After configuring recipient, email method, and access settings, you will be taken to the **Invitation Email Message** screen. This screen controls the content of the email used to deliver the questionnaire link to the client. You may use the default email template or make your own.

Customize Email Templates

You may edit the email text directly for each questionnaire, save text as a reusable template, or create multiple saved templates for different client scenarios.

Available actions include:

- **Save Template** – Save changes to the current template
- **New Template** – Create a new email template
- **Delete Template** – Remove an unused template

The colored link in the message is the secure questionnaire link the client will use.

It is **very important** that when editing your email templates, you **do not** remove the colored link from the email template. This link is unique and generated each time you share an interview.

Configure the "Result Page" Message

Next, you will see the **Result Page Message** screen. This controls what the client sees after they submit the questionnaire.

You may:

- Use the default confirmation message, or
- Customize the message to reflect your firm's tone and next steps

This page typically thanks the client for completing the questionnaire and sets expectations for what happens next (for example, that your firm will follow up). Like the invitation email, result page messages can be saved, reused, and customized using templates.

Last Step – Click Send Questionnaire!

Section 08

Client Questionnaires (Cont.)

Accessing and Saving the Client's Answer File

Once the questionnaire is submitted by your client:

- The completed answer file is available in your Agile EP account
- You may also receive an emailed copy of the client's completed questionnaire depending upon your preference selections.

To use the client's answer file for drafting:

- Go to **Manage > Shared Interviews**
- **Highlight** the client whose information you want to use (it will turn grey)
- Click the **three-dot menu** on the highlighted row
- Click **Download Saved Data**
- Go to **Manage > File Explorer**
- Drag the downloaded answer file into the appropriate folder in the **File Explorer** (Location or subfolder)

The saved answer file can then be loaded into drafting interviews and reused for compatible templates.

Alternatively, you can also open the template you want to draft with → click Load Answers → when the file window opens, drag in the saved answer file (or browse to your Desktop and select it) → click the file to load.

Other Menu Options (Quick Reference)

Here are the other menu options (per interview sent) that you may use in **Manage > Shared Interviews**, along with what each one does:

- **View Interview** – Opens the questionnaire interview so you can review it
- **Go To Folder** – Jumps to the template folder for that questionnaire
- **View History** – Shows when a questionnaire was shared, viewed, or completed (helpful for troubleshooting)
- **Download Document** – Downloads a copy of the generated questionnaire in PDF form (not the answer file used for drafting)
- **Resend** – Sends the questionnaire link again if the client can't find it
- **Deactivate** – Turns off the link so it can't be used anymore
- **Delete** – Removes the interview from the system entirely (use with caution)

Section 09

Questionnaires – What the Client Sees

When a client receives and opens a shared questionnaire link, they are taken to a secure, browser-based interview. Your client does not need a login or Agile EP account.

The Client Experience

From the client's perspective:

- The questionnaire opens in a clean, guided interview format
- The interface displays your **firm's logo and primary color**
- Questions are presented one section at a time
- Progress is saved as they move through the interview

Clients see only the questionnaire sections intended for them. Internal setup steps and configuration screens are not visible to the client.

Navigation and Completion

Clients:

- Navigate through the questionnaire using **Next** and **Back**
- Complete sections such as personal information, assets, and liabilities
- Submit the questionnaire when finished

Throughout the questionnaire, **help links** provide access to support pages with question-specific guidance and **related estate planning topics**.

If a questionnaire link includes:

- **Password protection**, you will email the client a system-generated **PIN**
- **An expiration period**, the link stops working after that time
- **Deactivation after completion**, the link becomes inactive once submitted

After Submission

After the client **submits** the questionnaire:

- They see the completion message (result page) you configured
- They cannot change their responses unless you resend a new link
- Their information is securely returned to your Agile EP account as an answer file.

Section 09

Questionnaires – Client Sees (Cont.)

Estate Planning Topics in the Questionnaire

As clients work through the estate planning questionnaire, they may see links to **Estate Planning Topics** on certain interview screens. These topics are short, general explanations meant to give clients helpful context as they answer the questionnaire.

What Clients See

The **Estate Planning Topics** are:

- Brief, plain-language overviews of common estate planning concepts
- Optional reference links that clients can open at any time
- Designed for education and orientation—not decision-making

They're there to help clients understand what a question means, especially when it uses unfamiliar terms.

Why These Topics Are Included

Many clients are encountering estate planning concepts for the first time. The topics provide just enough background to help clients feel comfortable answering questions about things like:

- Wills and revocable trusts
- Fiduciaries and guardians
- Health care and end-of-life preferences
- Property characterization and digital assets

The content is intentionally basic and general. It does not provide legal advice or replace guidance from the attorney.

How This Supports the Questionnaire

Clients can open a topic, get oriented, and return right back to the questionnaire without losing their place. By offering simple explanations at the moment they're needed, the questionnaire feels more approachable and easier to complete—while keeping all substantive planning decisions with the attorney.

Section 10

Managing Your Subscription

Firm administrators can manage subscriptions directly within Agile EP. Go to **Manage > Subscriptions**. This opens the **Agile Estate Planning Customer Portal**, where billing and subscription changes are handled.

Updating a Subscription

On the **Subscriptions** page, you can see your firm's active product information. Use **Update Subscription** to make limited changes to an existing subscription. From this screen, you can:

1. Change the number of users
2. Switch between monthly and annual billing
3. Cancel the current subscription

Products cannot be added or swapped from this screen.

Adding a New Product

To add a new product to your account go to the **Store**, find the product you want to add and select Subscribe next to that product.

Changing to a Different Product

If you want to move from one product to another (for example, from a Washington-only product to a multi-state product):

1. Go to **Manage > Subscriptions**.
2. Select **Update Subscription** for the current product.
3. Cancel the existing subscription.
4. Go to the **Store** and subscribe to the new product.

Your client data remains in Agile EP and is not tied to a specific product, so no client information is lost when changing products.

Canceling a Subscription

When you cancel a product subscription:

- Access continues through the end of the current billing period.
- The subscription is marked as canceling, with the end date clearly shown.

If you change your mind before the billing period ends, you can select **Don't cancel subscription** to immediately restore the subscription with no interruption.

Section 11

Help Resources

Need Help?

If you have questions or run into an issue, Agile EP Support is here to help:

- **Email:** support@agile-ep.com
- **FAQs + Help Center:** visit agile-ep.com to access FAQs, Help Center articles, and User Forums
- **Meet with us:** you can also schedule a virtual meeting with our team through our website or the Help Center

We Welcome Your Feedback!

We love hearing from our users—whether it's a typo, a question, or a feature you'd like to see. Please email us anytime, or click the **Feedback** button on any drafting interview to send a message directly to Support.