IowaDocs® Account Setup & Professional Configuration Guide

ACCOUNT SETUP PROCESS

Follow the steps below to access the IowaDocs® platform and begin firm configuration.

- Navigate to https://iowadocs.xpressdox.com/ to log in to the IowaDocs® portal.
- For administrators: Navigate to **Manage → Firm Information**.
- Complete the Firm Information page with all required company details before proceeding.

PROFESSIONALS CONFIGURATION

After completing Firm Information, add attorneys and preparers who will be needed for selection when filling out templates within the IowaDocs® library. The table below summarizes the available role and designation options:

Role / Option	Description
Attorney	Licensed Iowa attorney authorized to use IowaDocs® forms for client matters.
Preparer	Staff member who prepares documents on behalf of an attorney.
Both (Attorney & Preparer)	Assign both roles to a single professional if applicable.
Individual Preparer	Designates the preparer as a specific named individual.
Corporate Preparer	Designates the preparer as a firm or corporate entity.
Office Location Identifier	Labels such as “Des Moines office” or “Cedar Rapids office” to identify the professional’s location.

To add professionals to the system, follow these steps:

1. Select the appropriate role for the professional: Attorney, Preparer, or both.
2. Add an office location identifier if the firm has multiple offices (e.g., “Des Moines office,” “Cedar Rapids office”).
3. Choose the preparer designation: Individual or Corporate, as applicable.
4. Click “Confirm” to save a single entry, or “Confirm and Next” to immediately add another professional.

💡 Tip: You may return to the firm configuration at any time to modify existing professional profiles or add additional attorneys and preparers as your firm grows.

FINAL SETUP STEPS

Once all professionals have been added, complete the setup process using the following steps:

1. Click on the **Save Firm Information button** after all professionals are entered.
2. Click "OK" to confirm and complete the setup process.
3. Return to the form library by clicking Library in the top navigation bar.
4. All users can now access IowaDocs® forms with pre-configured attorney and preparer information automatically populated.

ACTION ITEMS

1. Distribute this guide to firm administrators and IT staff responsible for initial platform configuration.
2. Verify that all attorneys and preparers have been added and that firm information is complete before members begin using the platform.

⚠️ Note: This document is based on the IowaDocs® demonstration YouTube video "Setting up your Firm Information (attorneys and preparers) in XpressDox." Contact IowaDocs® Support if you require additional assistance with platform setup.