Quick Start Guide

Logging In

1. Visit: https://companyname.thoughttrace.com/land/.
2. Enter Username and Password.
3. Click **Log In**.

Tip: Be sure to substitute your company name in the URL above.

Uploading Documents

1. Click **Upload** in the top navigation bar.
2. Drag and drop file(s) or click to browse for file(s).
3. Click **Submit**.
4. Select a Document Type.
5. Add Tags and/or populate Attributes.
6. Click **Save**.

Reviewing Documents

1. Click **Review** in the top navigation bar.
2. Click the **Ready for Review** button.
3. Click an entity in the provision panel to view provision text.

Tips: Click the ✚ icon in the provision panel to expand entities list.
Click the ℹ icon next to an entity to view a description.

Editing Provision Text

1. Click on the text you wish to edit.
2. Type revisions.
3. Click the icon to save.

Adding Remarks

1. Click the icon.
2. Type remarks and click the **Add** button.

Tips: Remarks can be placed at the document level or the entity level.
Remarks can only be added to populated data fields.

Using Provision Search

1. Click **Search** in the top navigation bar and select **Provision Search**.
2. Select a **Document Type**.
3. Click **+** to expand entity.
4. Select provisions and/or fields.

Tip: Use search bar to apply a text filter.

Using Saved Queries in Document Search

1. Click **Search** in the top navigation bar and select **Document Search**.
2. Click on **Select a Query** (next to Search button).
3. Select the appropriate query from the drop-down list.
4. Click the **Search** button.

Tips: It is possible to modify shared queries or create your own query.
*Click **Clear** before starting a new search.*
*Click **+ Filter** to add an "AND" filter to your search.*
*Click **+ Group** to add an "OR" filter to your search.*

Exporting Search Results

1. Click **Search** in the top navigation bar and select **Document Search**.
2. Select a shared query or create your own.
3. Click the **Search** button.
4. Scroll down to search results and click **Export Results** button.
5. Select **One Line Export** or **Data Export**.

Tip: Hover over the Exports icon to see the status of the export.

Getting Help

1. Click the button in the top navigation bar.
2. Select the appropriate resource from the drop-down menu:
   - **Support**: Support, product updates and knowledge base
   - **ThoughtTrace Academy**: Free online training and webinars
   - **Community**: User discussions and enhancement requests