

Populate Documents in OneDrive and iSolved

Created By
Rachel Hollander

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Microsoft OneDrive

1

- A. Click in Partner Legal Name field
- B. Type HR Butler

2

- A. Click on Date field
- B. Type today's date

3

- A. Click on Name field
- B. Click on AddOnAgreement2026 (3).pdf
- C. Type Courtney Adgate

A. Click on Phone Number field
B. Type 6149234000

3 of 9

A. Click on Email field
B. Type cadgate@hrbutler.com

3 of 9

A. Click on Address field
B. Type 5115 Parkcenter Avenue

[illegible]

7

- A. Click on City, State, Zipcode
- B. Type Dublin, OH, 43017

8

- Checkmark LMS with Content Library

9

- A. Click on Client Name field
- B. Drag highlighted element
- C. Type Client Name

10

- A. Click on Client Address field
- B. Type Client Business Address

A screenshot of a web form titled "All of the following information is REQUIRED to complete your order." The form contains several fields. A blue rectangular box highlights the "Client Address" field, which currently contains the text "506 McConnell Street". Other visible fields include "Client Name" (Testing 123), "Contact Name" (Allison Early), "Contact Email" (aearly@signaturecontract.com), "City, State, Zip" (Loveland, OH 45140), "Contact Phone Number" (613-815-5900), "Company ID" (610401), "Number of Employees" (8), "Company Website (URL)", and "Isolated Use Only Sales Consultant Name".

11

- A. Click on City, State, Zipcode fields
- B. Type client City, State, and Zipcode

A screenshot of the same web form as in step 10. A blue rectangular box highlights the "City, State, Zip" field, which now contains the text "Clover, SC 29710". The "Client Address" field remains "506 McConnell Street". Other fields are the same as in the previous screenshot.

12

- A. Click on Company ID
- B. Type client code from isolated

A screenshot of the same web form as in step 11. A blue rectangular box highlights the "Company ID" field, which now contains the text "CA01". The "City, State, Zip" field remains "Clover, SC 29710". Other fields are the same as in the previous screenshot.

13

- A. Click on Contact Name field
- B. Type primary contact name

All of the following information is REQUIRED to complete your order.

Client Name	Testing 123	Contact Name	Courtney Adgate
Client Address	506 McConnell Street	Contact Email	asadgate@hrbutler.com
City, State, Zip	Clover, SC 29710	Contact Phone Number	615-815-5900
Company ID	CA01	Number of Employees	8
Company Website (URL)			
iSolved Use Only			
Sales Consultant Name			

14

- A. Click on Contact Email field
- B. Type primary contact email address

All of the following information is REQUIRED to complete your order.

Client Name	Testing 123	Contact Name	Courtney Adgate
Client Address	506 McConnell Street	Contact Email	asadgate@hrbutler.com
City, State, Zip	Clover, SC 29710	Contact Phone Number	615-815-5900
Company ID	CA01	Number of Employees	8
Company Website (URL)			
iSolved Use Only			
Sales Consultant Name			

15

- A. Click on Contact Phone Number field
- B. Type primary contact phone number

All of the following information is REQUIRED to complete your order.

Client Name	Testing 123	Contact Name	Courtney Adgate
Client Address	506 McConnell Street	Contact Email	asadgate@hrbutler.com
City, State, Zip	Clover, SC 29710	Contact Phone Number	7049410281
Company ID	CA01	Number of Employees	8
Company Website (URL)			
iSolved Use Only			
Sales Consultant Name			

16

- A. Click on Number of Employees field
- B. Type number of employees within isolved

All of the following information is REQUIRED to complete your order.

Client Name	Testing 123	Contact Name	Courtney Adgate
Client Address	505 McConnell Street	Contact Email	cadgate@hrbutler.com
City/State/Zip	Clover, SC 29710	Contact Phone Number	704.9410261
Company ID	CA01	Number of Employees	
Company Website (URL)			

Isolved Use Only
Sales Consultant Name



hrbutler.myisolved.com/default.aspx

17

- Type your client name or number within the search

Client ID	Client Name	Legal ID	Legal Name	DBA Name	Federal ID	Legal Status	State Code
CA001	CA Hopes and Dre...	CA001	CA Hopes and Dre...		12-1456789	Active	SC
CA002	Courtney Copy Tes...	CA01	CA Hopes and Dre...		12-1456789	Commission	SC
CA003	Courtney Copy Tes...	CA03	CA Hopes and Dre...		12-1456789	Commission	SC
CA004	Courtney Testing 2	CA04	CA Hopes and Dre...		12-1456789	Commission	SC

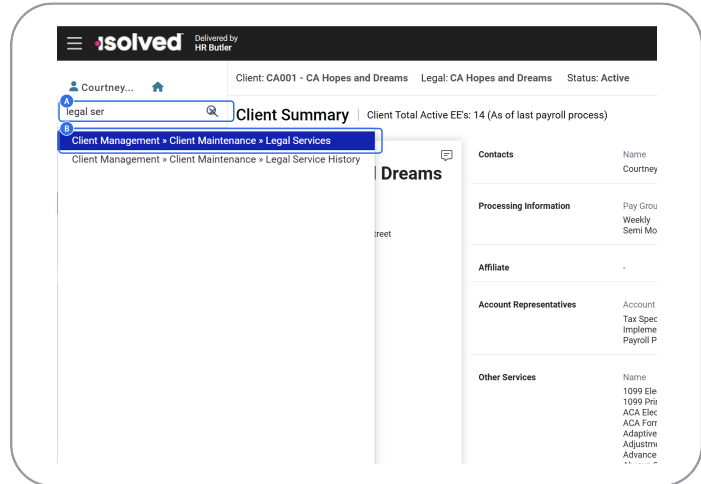
18

- Click on a client

Client ID	Client Name	Legal ID	Legal Name
CA001	CA Hopes and Dre...	CA001	CA Hopes a
CA002	Courtney Copy Tes...	CA01	CA Hopes a
CA003	Courtney Copy Tes...	CA03	CA Hopes a
CA004	Courtney Testing 2	CA04	CA Hopes a

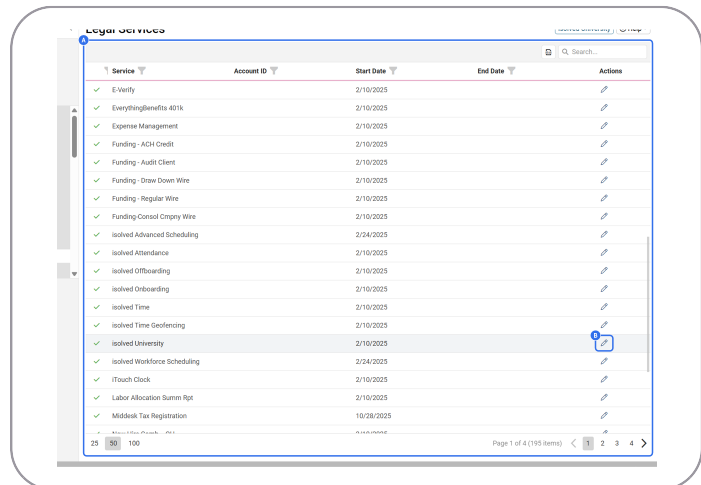
19

A. Type legal ser
B. Click on Client Management » Client Maintenance » Legal Services



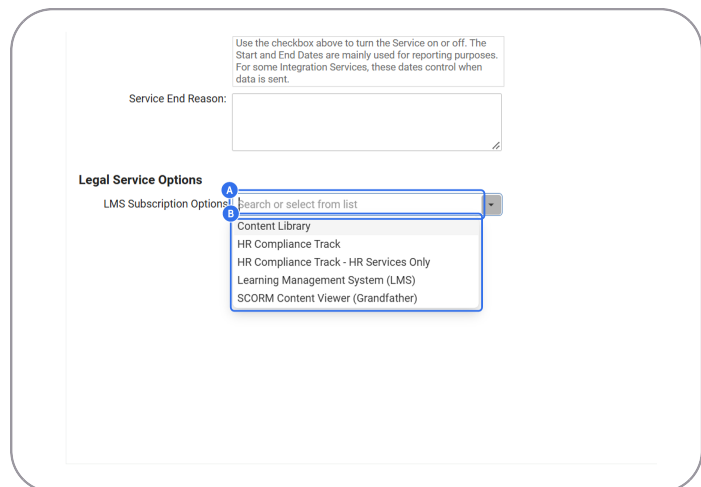
20

A. Click the pencil beside the iSolved University legal service
B. Click on Edit



21

A. Click on dropdown trigger for LMS Subscription Options
B. Select Content Library



22 Click on Save

