

netdocuments®  
**CUSTOMER WELCOME GUIDE**





# WELCOME TO NETDOCUMENTS

On behalf of all of us at NetDocuments, welcome! We look forward to partnering with you to provide your **cloud-first, cloud-only** content management platform where you can secure, organise, and collaborate on everything that matters to you.

In this document you'll find various links and information to maximise adoption amongst your users and information on how you can best contact support should you need to reach us for any reason.

I invite you to utilise the various links and information included within this document. They are here to assist you in further adopting the platform, receiving assistance when required and having access to the latest information regarding our company and products.

Sincerely,

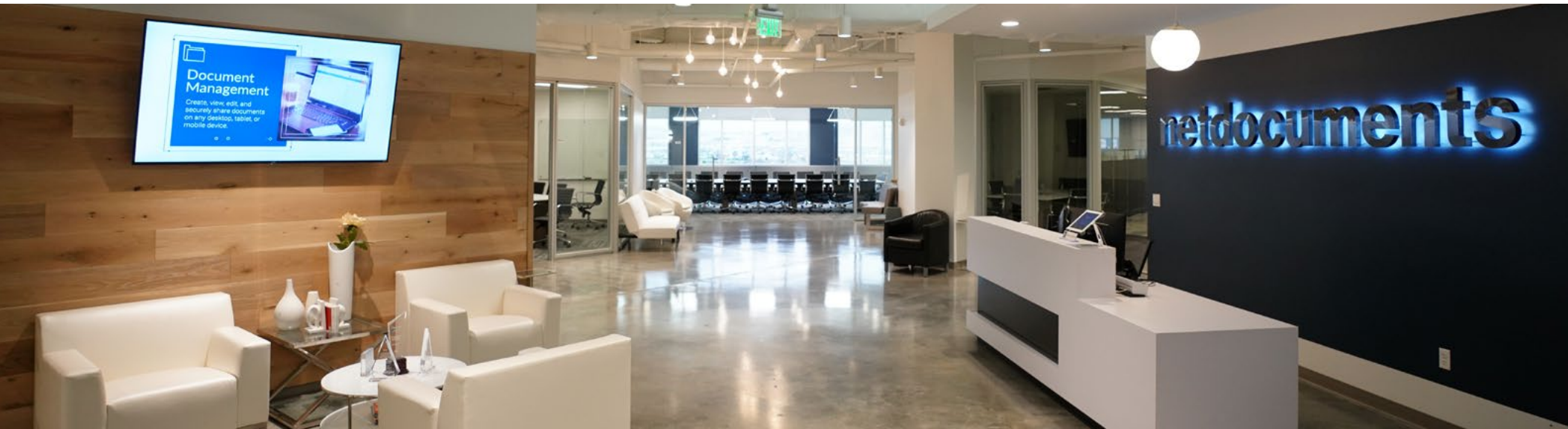
A handwritten signature in black ink that reads "Brandon Russell". The script is fluid and cursive, with the first letters of "Brandon" and "Russell" being capitalized and prominent.

**BRANDON RUSSELL**

Vice President, Customer Success



# ABOUT US



Born in the Silicon Slopes tech corridor just outside of Salt Lake City, NetDocuments was founded by Ken Duncan, Lee Duncan, and Alvin Tedjamulia as one of the first Software-as-a-Service (SaaS) companies in the world. The industry visionaries who founded NetDocuments started the company with a singular cloud-first vision to make collaboration between offices, clients, and geographies a reality.

For more than 20 years, NetDocuments has delivered security innovation through a world-class content services platform that has been deemed safe, ready, and proven by more than 2,850 professional services firms and corporate legal departments across the globe.

*Dedicated to helping individuals, teams, and firms Work Inspired™.*

We started with secure document management, but realized there were other challenges professionals were facing that we could solve. Now, NetDocuments is a multi-product platform offering a robust document management system solutions that lets users easily collaborate, share, and manage documents directly in the applications they use most.

Our simple and secure content services platform provides a single source of truth for document management and creation, enabling organizations across the globe to improve workplace productivity while ensuring sensitive information is never lost or in the wrong hands.

# GET STARTED WITH NETDOCUMENTS

We invite you to utilize the various links and information included in this document. Administrators can learn how to set up, administer, and troubleshoot NetDocuments. Administrators can also review the most frequently asked “How-to” questions that NetDocuments Support receives from customers. Users can learn to use NetDocuments and additional add-in products.

## FOR ADMINISTRATORS



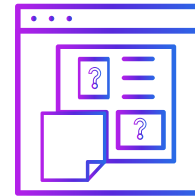
Get Started:  
Administrators



Direct Download  
Links



Compliance  
Materials



FAQs for  
Administrators



Administration  
Overview

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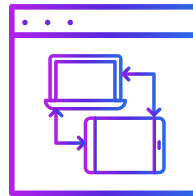
## FOR USERS



Get Started:  
Users



Overview and  
Navigation



2023 Web  
Refreshes



Update  
Process



Add-in  
Guides



# SUPPORT

Submit support requests at [support.netdocuments.com](https://support.netdocuments.com). You can also call our Technical Support Team using the phone numbers below:

**US** (866) 638-3627  
**UK & Europe** +44 (0) 203 129 9324  
**AU** +61 2 8310 4319

Telephone Support is provided with no additional charge. Cases can be submitted online 24 hours a day.

## ADDITIONAL RESOURCES



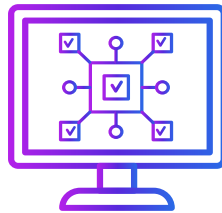
Customer Idea Portal



Support Escalation  
Procedures



Service Status



Tips for Submitting  
Support Requests



# NETDOCUMENTS SOLUTIONS

Building on our core technology pillars that have been enabling inspired work for the last twenty-one years, we're delivering 5 new solutions—**ORGANIZE**, **PROTECT**, **PLAN**, **DELIVER**, and **LEARN**—that create structure and provide the framework required for legal professionals to create new habits that lead to consistent, positive outcomes.

## *WORK INSPIRED™*

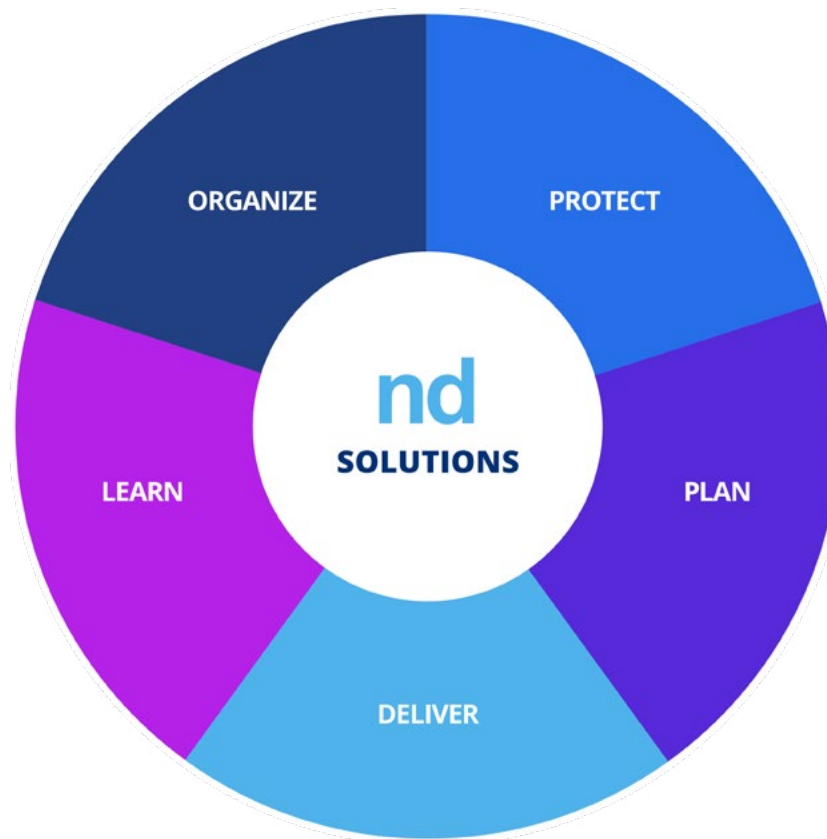
When you can spend less time searching and more time doing, That's Work Inspired.

### **ORGANIZE**

Replace inflexible, generic document and email management tools with a best-in-class, cloud-based solution that inspires your best work.

### **PROTECT**

Add advanced security capabilities to your core NetDocuments solution that provide the extra confidence and control you need to work inspired.



### **PLAN**

Reduce inbox congestion, keep lines of communication open, and streamline workflows to improve productivity and inspire your teams' best work.

### **DELIVER**

Safely organize, package, and share content with clients, customers, outside counsel, and other internal and external groups.

### **LEARN**

Unlock insights in your documents that will boost efficiency, increase productivity, and drive better outcomes and inspired work across your organization.

# CONTACT US



For immediate assistance, please contact your NetDocuments Account Manager.

For questions related to billing, please contact our Billing Department at **[accounts-receivable@netdocuments.com](mailto:accounts-receivable@netdocuments.com)**

For other questions, please contact our Customer Success Team at **[customersuccess@netdocuments.com](mailto:customersuccess@netdocuments.com)**

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