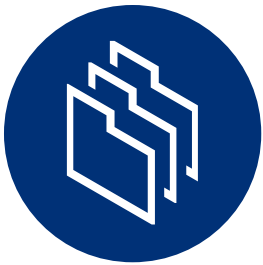


**When your documents stop
playing hide and seek.**

That's Work Inspired™



The **ORGANIZE**
Solution



netdocuments®



ORGANIZE

ORGANIZE includes the core capabilities you need to reach new levels of productivity—including document management, email management, and OCR. With ORGANIZE, you can replace generic, inflexible, off-the-shelf document products with a best-in-class, cloud-based solution that is built specifically for the legal profession.

Core Technology Includes:

NetDocuments

Use the industry's leading cloud-based document management system to increase productivity, collaboration, organization, and security.

NetDocuments provides a reliable and secure way to create, edit, store, locate, and collaborate on documents anywhere using any device, so you can stay focused on clients and outcomes.

This includes workspaces that are designed around your matters and projects, flexible metadata, document versioning, and unrivaled searchability—all working to make your documents more useful and productive.

ndMail

Take control of your inbox and keep all your communications secure and organized.

ndMail uses predictive filing—powered by artificial intelligence—to make your inbox more collaborative and efficient.

With ndMail, you can file emails quickly and accurately, see emails that other members of your organization have filed, and dramatically reduce the time you spend organizing and sharing emails—all directly from your Microsoft Outlook or Gmail inbox.

Optical Character Recognition (OCR)*

Make your document searches smarter and more efficient by digitizing and indexing content from scanned documents or photos.

With NetDocuments OCR, you gain the peace of mind that comes from knowing every search will yield complete results. The system works behind the scenes 24/7 to automatically digitize content, so it becomes a fully integrated, easily searchable piece of your collective knowledge.

Microsoft Power Automate

Automate time-consuming manual processes by adding UI flows and robotic process automation to your NetDocuments solution.

The NetDocuments Connector for Power Automate provides access to 58 NetDocuments API calls. This allows Power Automate flows to take actions on the workspaces, folders documents, users, and groups in your NetDocuments repository.

With this tool, you can create WorkSpaces and CollabSpaces, add users to a repository, create groups, add to a cabinet, and more.

NetDocuments Integration with DocuSign eSignature

Send, receive, and track e-signatures easily and efficiently.

With NetDocuments' integration with DocuSign eSignature, the undisputed world leader in electronic signatures, you can request and obtain e-signatures more efficiently and securely from directly inside NetDocuments. Plus, you have full visibility of the e-signature process from start to finish with easy status tracking, which means greater productivity and accelerated agreement completion.

Add On Technology Options:

ndSync

Enable your remote workers with two-way file syncing between NetDocuments content and your users' local machines.

*OCR Backlog is not included with this offering



NetDocuments

NetDocuments meets your teams where they work—by making the industry's leading document management capabilities available directly through the applications they use every day. With this proven cloud-based solution, you gain all the advantages of seamless user experiences, easy access, and superior encryption and security, so your teams can stay safe, connected, and organized.

Increase productivity, collaboration, organization, and security:

- **Organize for Productivity**

NetDocuments includes Workspaces, which makes it easy to organize your work by matter or project. It's a safe digital space you can use to collaborate, access information, and share resources.

- **Locate Documents Quickly**

Make finding NetDocuments content as fast and easy as a web search. With its powerful search capabilities and a customizable personal homepage, NetDocuments will help you locate documents quickly using straightforward filters, key words, favorites, and more.

- **Securely Share Content**

Whether it's a single file or a collection of documents, NetDocuments provides the tools you need to share information securely. This includes the ability to quickly convert Word documents to PDFs, zip groups of files together, and securely share NetDocuments content over email—all without impacting the original files.

- **Work Anywhere**

Confidently access your work anywhere you have internet access using a laptop, desktop, or smartphone (iPhone and Android)—all while taking advantage of NetDocuments' award-winning security.

- **Reduce Workflow Disruptions**

Keep working in the applications you already know and trust, thanks to NetDocuments' seamless integration with Microsoft Office, Outlook, Visio, Adobe Acrobat, and Adobe Reader.

- **Connect Your Favorite Tools**

Use the robust NetDocuments App Directory to build and configure a solution that perfectly matches your team's requirements. This includes integrating billing, matter management, and other essential capabilities.

Technology That Doesn't Stifle Creativity

Innovation and creativity are the secrets to groundbreaking legal work. But when the software you depend on is clunky and outdated, it's easy to get lost in the frustration of completing simple everyday tasks. NetDocuments **transforms your work by removing the barriers that slow productivity and limit collaboration**—including insightful features, legal-centric document organization, and innovative software integrations that keep the technology out of your way, so you can **focus on getting results for your clients**.



ndMail

Email is where most lawyers live and breathe, but email applications were never intended to handle the rigors and nuances of legal work. All too often, this leaves law firms with inefficient workflows that slow them down and create too much room for error.

ndMail transforms your inbox into an efficient and productive engine for legal work. With ndMail, you can access core NetDocuments' capabilities directly from Outlook or Gmail, so you can maintain a complete work file, seamlessly store emails and conversations in specific project files, and more.

Keep every communication organized with these intelligent features:

- **File with a Single Click**

ndMail uses AI technology to predict and recommend filing locations for emails based on group and individual behaviors.

In most cases, that means filing an email is as simple as clicking to confirm the suggested location.

- **Automatically File Replies**

With Conversation Filing, NetDocuments automatically stores replies and forwarded emails in the same location as the original message.

- **Work from Anywhere**

If you can access Outlook or Gmail, you can take advantage of ndMail's document management capabilities. That makes it easy to keep working and stay productive anywhere—even when you're offline.

- **Keep Your Flow**

If you regularly file emails to a limited number of locations, you can use ndMail's Folder Mapping and Pinning to gain quick access to frequently used documents and file emails with a simple drag and drop.

- **Avoid Duplicate Filings**

With ndMail's Global Filing Indicator, everyone on your team receives an Outlook alert every time an email gets filed in NetDocuments. This makes it easy to avoid duplicate filings and keep everyone on the same page.

- **Save Emails with Confidence**

When you file emails in NetDocuments, they receive the same protections and safeguards as all of your other NetDocuments content, including multi-layered encryption, dual-custody, geo-aware storage, and more.

Take Control of the Inbox

Legal professionals have zero time to waste. ndMail saves time and keeps everyone on your team productive with personalized **time-saving features** that **keep your momentum going**. With predictive filing, folder mapping, and a global filing indicator, ndMail redefines what it means to "work out of your inbox" by increasing the speed and accuracy of your entire legal team.



Optical Character Recognition*

You simply don't have time to manually sift through multiple folders and file collections to find the one specific document you're looking for. With Optical Character Recognition (OCR) from NetDocuments, you'll never have to.

OCR works behind the scenes 24/7 to automatically digitize and index scanned documents and photos, which makes their detailed contents fully searchable from within NetDocuments. With OCR, you can feel confident that every search is returning complete results. And you can stop creating lists with the locations and exact titles of important documents—and start using that time for more important tasks.

Take advantage of these powerful features to search with confidence:

- **Automatically Index Content**

NetDocuments OCR actively monitors NetDocuments for new file uploads, scans and digitizes those files behind the scenes, and securely stores the now fully searchable content for future use.

- **Compress Documents**

OCR automatically compresses every document it scans to make content more accessible and easier to download—no matter where you are or what device you're using.

- **Manage Legacy Content**

With NetDocuments OCR, you can prioritize your legacy content and take advantage of a "backlog mode" to make sure your most important documents and images get scanned and indexed first.



How does NetDocuments OCR work?

NetDocuments OCR uses sophisticated technology to transform static documents into fully searchable sources of information. This starts with **Content Grouping** technology that automatically evaluates files and determines whether they are readable by the system. Next, OCR performs a detailed **Structural Analysis** of the document to divide it into logical pages, words, and characters, which are then isolated and compared to pattern sets. Finally, the system uses advanced **Character Matching** technology—which combines pattern analysis and dictionary matching—to create a high-quality, fully searchable text version of the static document image.

*OCR Backlog is not included with this offering



Microsoft Power Automate Connector

How much time does your IT team spend creating workspaces, updating repository users, and creating new groups within cabinets? The NetDocuments Microsoft Power Automate Connector (formerly Microsoft Flow) simplifies and automates these mundane processes to the point where your **legal teams can easily perform this work themselves without involving IT.**

By creating automated workflows between your organization's favorite apps and services, your IT team can **empower users** to synchronize files, get notifications, collect data, and more.



Use Power Automate's libraries of templates and connectors to:

- **Boost Productivity**

Build time-saving workflows into everything from individual tasks to large-scale systems with seamless integrations that take advantage of hundreds of prebuilt connectors.

- **Put Intelligent Workflows to Work**

Automate time-consuming manual tasks with built-in AI capabilities, so you can free up more time to focus on strategic, high-value opportunities.

- **Quickly and Securely Automate—
at Scale**

Enable everyone to build secure workflows with a no-code guided experience that leverages cloud-based data loss prevention, identity, and access management services.

You Don't Need to Wait for IT

The NetDocuments Connector for Power Automate gives power users in your organization the ability to create Workspaces and CollabSpaces, add users to repositories, and take actions on Workspaces using more than 50 Power Automate flows—all without involving your NetDocuments admin. It's a powerful new tool your teams can use to save time, automate repetitive and tedious tasks, streamline processes, and get more done in less time.



NetDocuments Integration with DocuSign eSignature

Collecting signatures can be a time-consuming, logistical headache whether you distribute your documents physically or digitally. Even with electronic signature solutions, there are extra clicks in transferring documents from a DMS to an e-signature solution and back again, which can expose documents—and your firm—to risk.

With NetDocuments' integration with DocuSign eSignature, you can harness the power of the world's #1 e-signature platform built directly into the DMS. You can streamline workflows, save valuable time, and avoid the cumbersome challenges of a typical signing process—without compromising on security.

Easily send, receive, and track e-signatures with these secure features:

- **Streamline Your Process**

Users can easily send, receive, and track e-signatures on documents inside NetDocuments—no printing, scanning, or exporting necessary.

- **Maintain Security and Governance**

Never having to download a local copy of a document means you no longer need to worry about governance or retention issues. Plus, you won't end up with multiple copies spread across disparate locations.

- **Request and Track Signatures**

With NetDocuments' integration with eSignature, you can efficiently mark areas of a document for signature and send signature requests via DocuSign's secure platform.

- **Automate the Final Product**

Once all signatures are obtained, a new document is automatically uploaded to NetDocuments with all signatures included.



Unmatched convenience, security, authenticity, and simplicity.

By partnering with DocuSign, the undisputed world leader in electronic signatures, to integrate this capability into NetDocuments, the signature process is even easier—and more secure. With NetDocuments' integration with DocuSign, requesting and obtaining e-signatures is more efficient and less complex for internal and external users alike. Say "hello" to greater productivity and accelerated agreement completion for transactions, NDAs, employment-related documents, and more.



ndSync

No internet connection? No problem. With ndSync, you can maintain secure, local access to the documents you need whether you're in the car, on a plane, or in some other location where you can't access the Internet. With ndSync, everyone on your team can manage their documents directly from their local computer, while still enjoying the benefits of secure document encryption and cloud sharing.



Bad luck doesn't stand a chance when you use ndSync to:

- **Synchronize Content Across Devices**

ndSync connects your local computer with the cloud, so you can access the specific files, folders, and workspaces you select directly from your local computer—even when you're offline.

- **Automate Offline File Syncs**

ndSync uploads new files you create offline as soon as you reconnect to the Internet, so you know you're always working with the latest versions of your files.

- **Stay Organized**

Define a folder structure locally on your computer that automatically syncs to the cloud. This allows you to maintain consistency and ease of use both on your own computer and in NetDocuments.

You're Always in Control

ndSync keeps you and your team productive and in control—regardless of circumstances—so you can meet deadlines, manage your documents, and stay productive no matter what happens.



When millions of documents become one source of truth.

That's Work Inspired™

Lawyers have enough on their plates without the constant drain of tedious administrative tasks or the endless hunt for important documents.

With the ORGANIZE solution, you can access your documents from anywhere, file emails automatically, and spend more time focusing on creating excellent client experiences and better legal outcomes.

Give your lawyers the tools they need to *Work Inspired*.

Get ORGANIZED today.

To learn more, visit
www.NetDocuments.com
or call **(866) 638-3627**.

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