

## Overview

The NetDocuments integration for LegalConnect streamlines the movement of documents for eFiling orders between the two systems.

### What is NetDocuments?

NetDocuments is a Document Management System (DMS) that helps Law Firms manage all the documents created and used by the firm. It provides document version control, access control, collaboration, and many other features. Their website is: <https://www.netdocuments.com/>

### Key Benefits

The integration streamlines the movement of documents in two ways:

1. When placing an eFiling order, documents can be loaded into the LegalConnect workflow directly from NetDocuments. This saves time by eliminating the need to download a document from NetDocuments to the local computer first before uploading it to LegalConnect.
2. When an eFiling order is completed by the court clerk, returned documents are automatically saved into the NetDocuments system in the proper Client and Matter folder.

## Activating and Using the LegalConnect and NetDocuments Integration

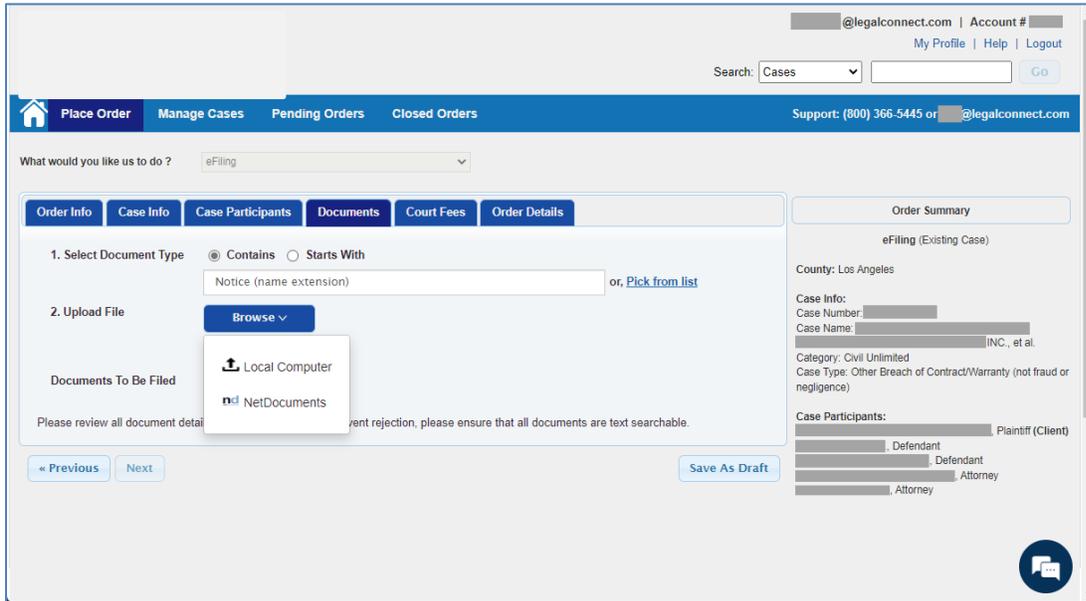
### Enabled for Service Providers

The NetDocuments integration must be enabled for a Service Provider's LegalConnect portal. Once enabled, all customers who log in to that Service Provider's portal will see the NetDocuments option when uploading a document to an eFiling order, but only customers who have a NetDocuments account will be able to make the connection and use the integration.

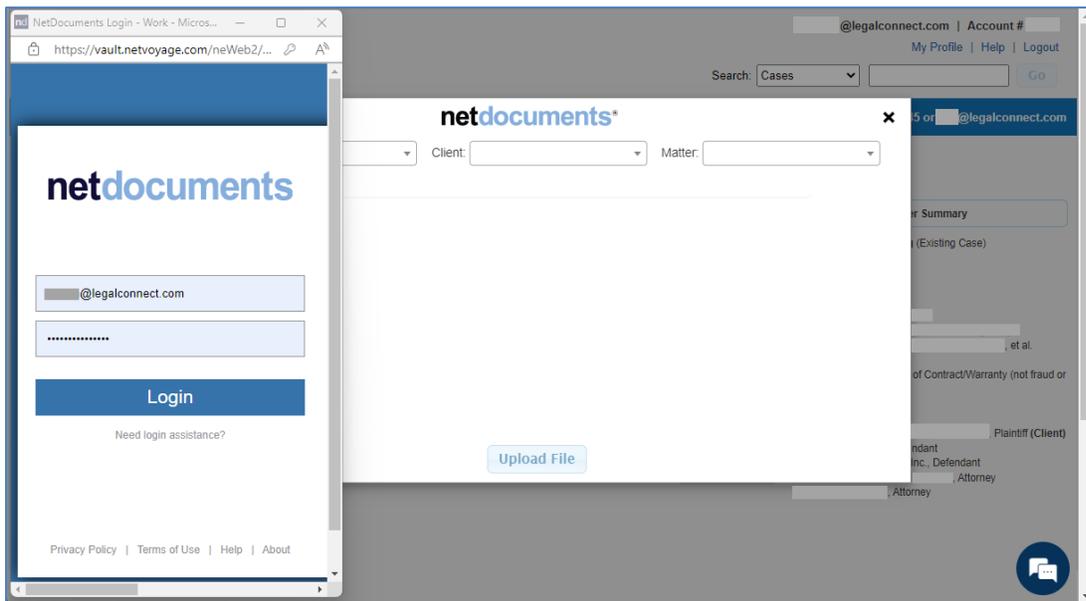
### Connecting NetDocuments to LegalConnect

When the NetDocuments integration is enabled, customers placing an eFiling order will see the option on the Documents tab. After selecting to upload a file from NetDocuments, the user will be prompted to make the connection.

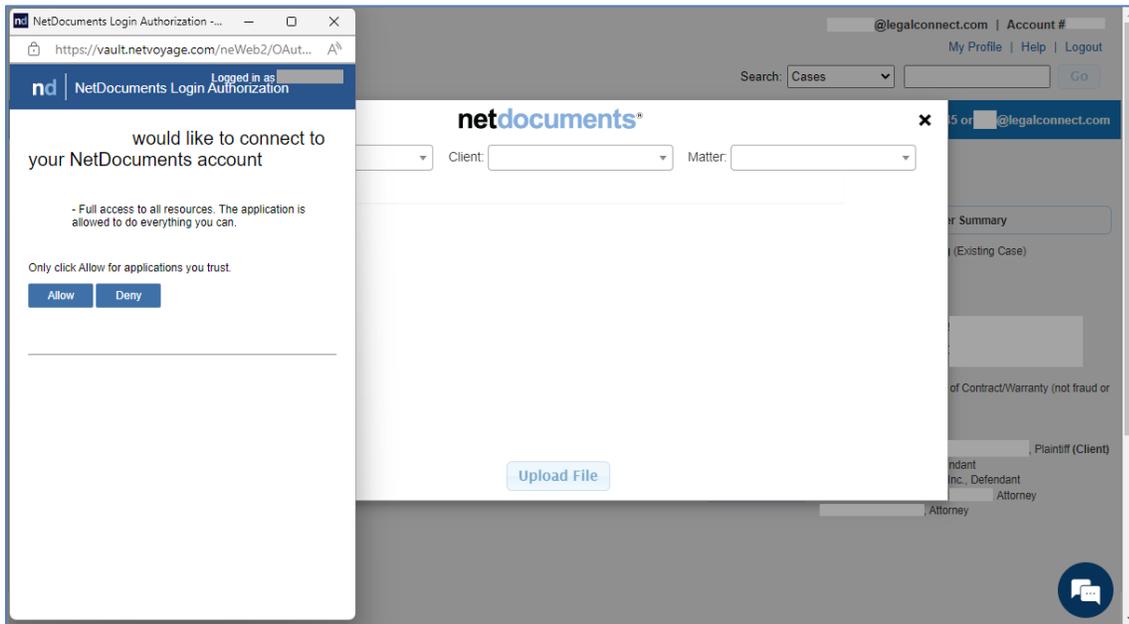
1. From the "Documents" tab of an eFiling order, after selecting a Document Type, click the "Browse" button then "NetDocuments".



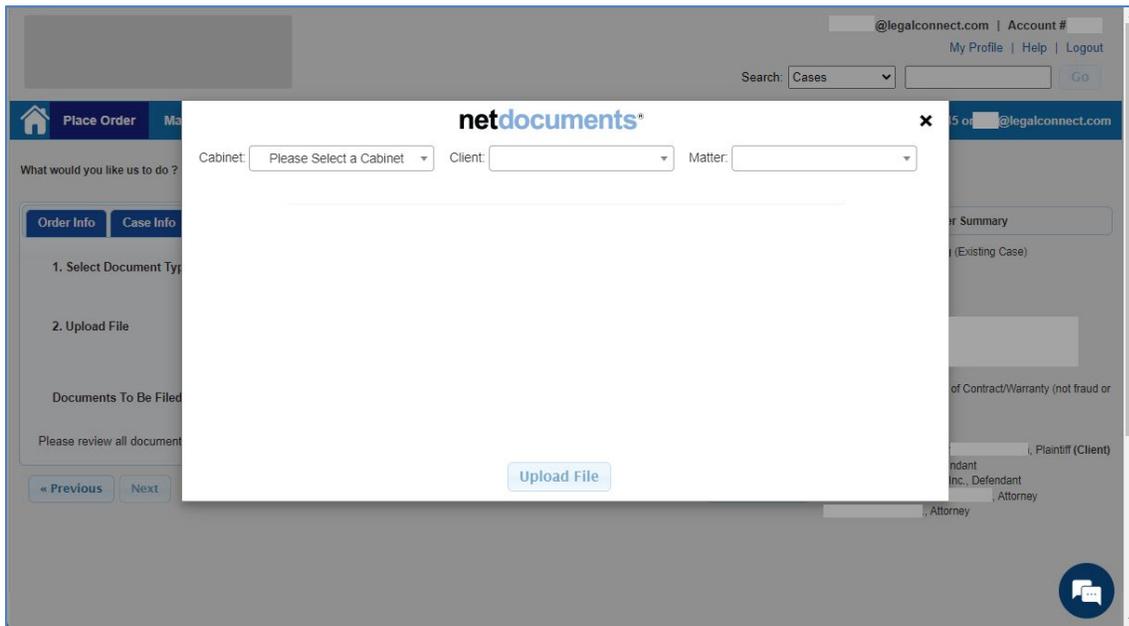
2. A pop-up window will open asking the user to enter their NetDocuments credentials.



3. After providing their NetDocuments credentials, the user will be asked to allow the connection to their NetDocuments account.

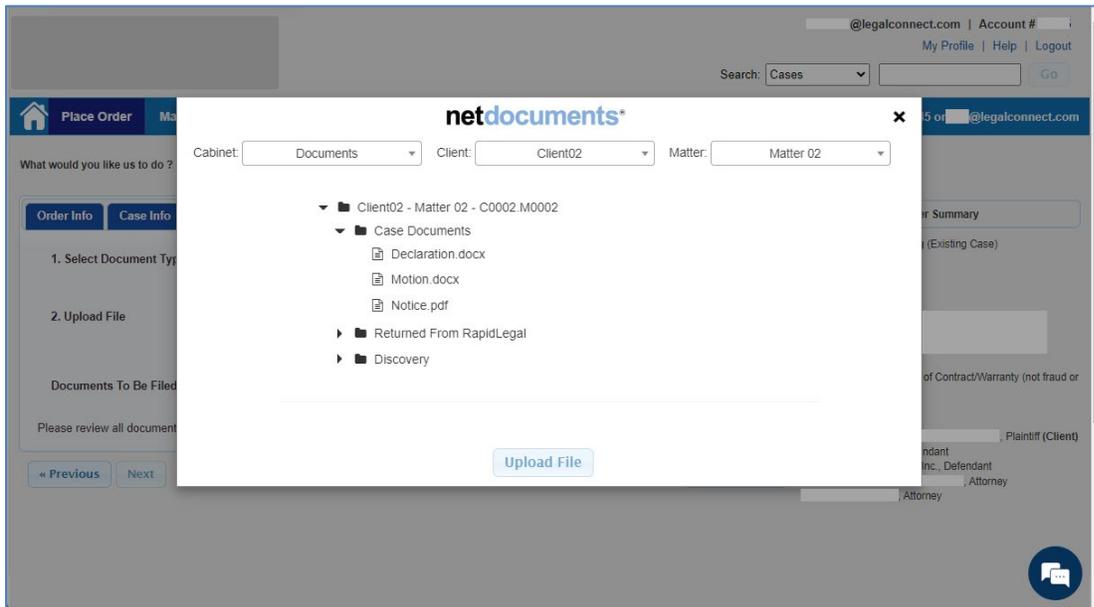


- Once the connection is allowed, the pop-up window closes, and the user returns to the LegalConnect order workflow and sees the NetDocuments file selection window.

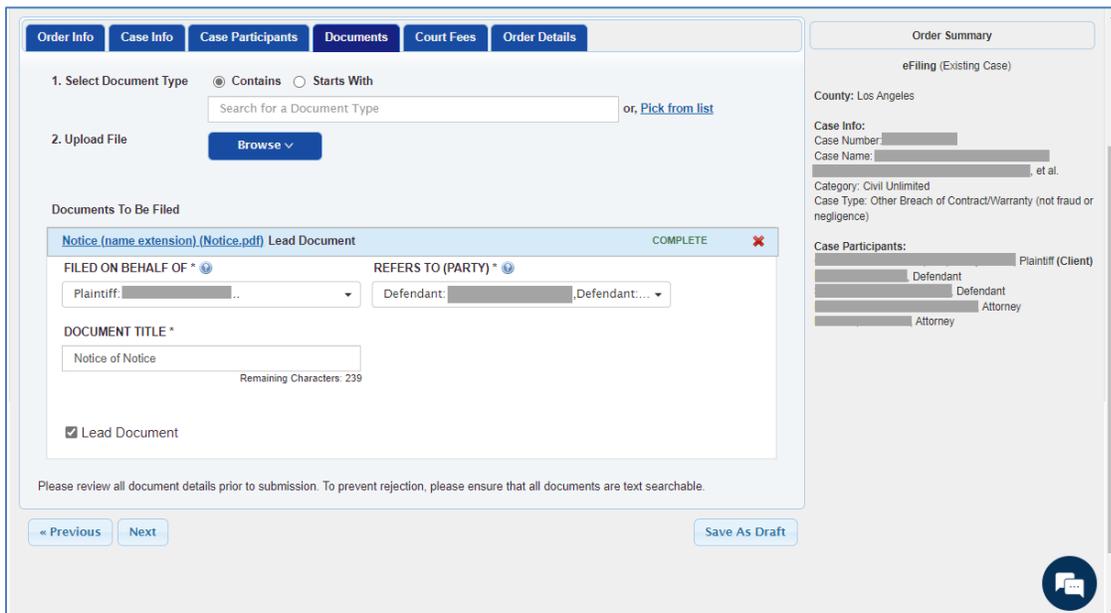


Uploading a Document to LegalConnect from NetDocuments

- After establishing the connection between LegalConnect and NetDocuments, the user can browse to a NetDocuments Cabinet, Client, and Matter and see the folders and files.



6. After selecting a file and clicking the “Upload File” button, the document is pulled directly from NetDocuments into LegalConnect, added to the order, and appears in the “Documents To Be Filed” section. **PLEASE NOTE:** All document PDFs must conform to court rules for submission. A password-protected, or fillable pdf document will cause an error message to be displayed.
7. From this point the eFiling order workflow continues with no other changes.

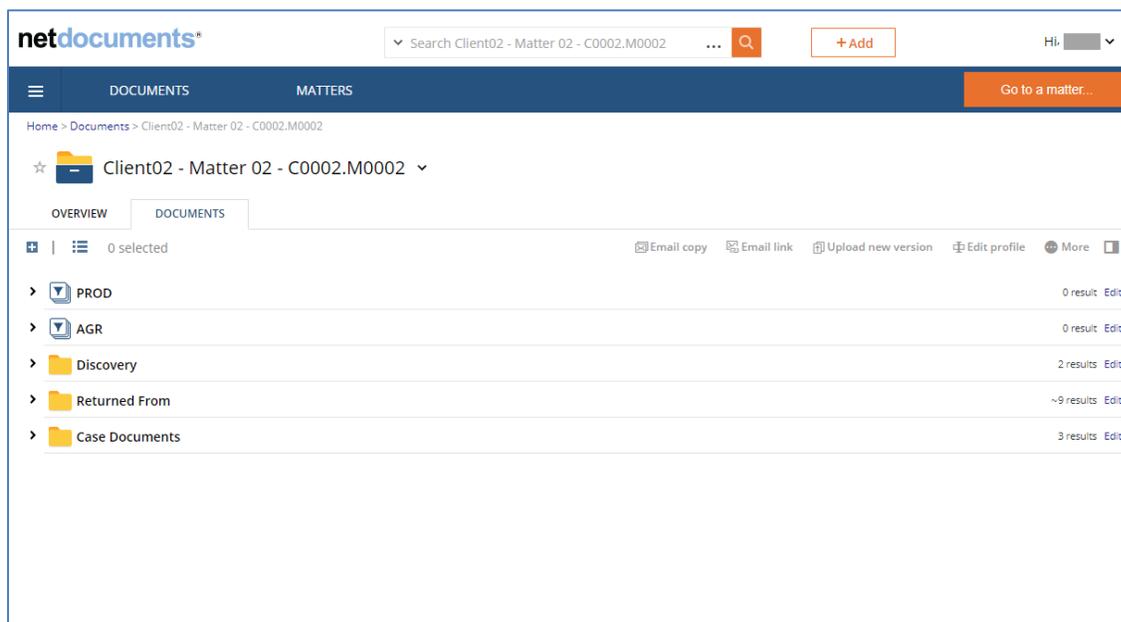


## Viewing Documents Returned from the Court

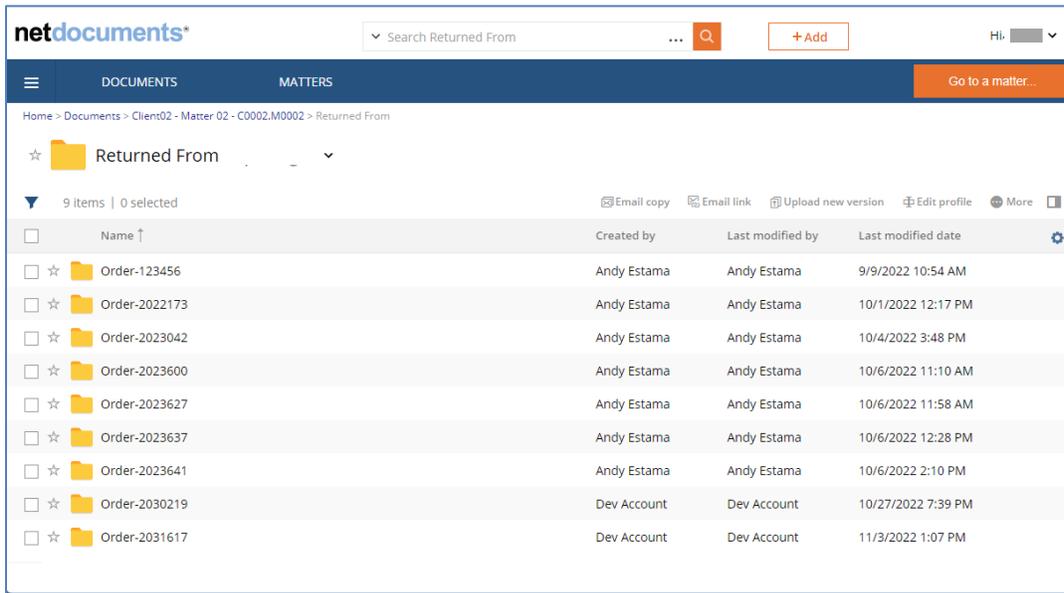
When utilizing the integration between NetDocuments and LegalConnect, all standard LegalConnect functionality for court returned documents is still available. Court returned documents will be viewable in the “Deliverables” tab of the LegalConnect order, and you will receive the email from LegalConnect indicating whether your eFiling order was Accepted, Rejected, or Partially Accepted along with links to download the documents.

In addition, the court returned documents will be automatically saved into your NetDocuments account under the Client and Matter you selected when submitting the order.

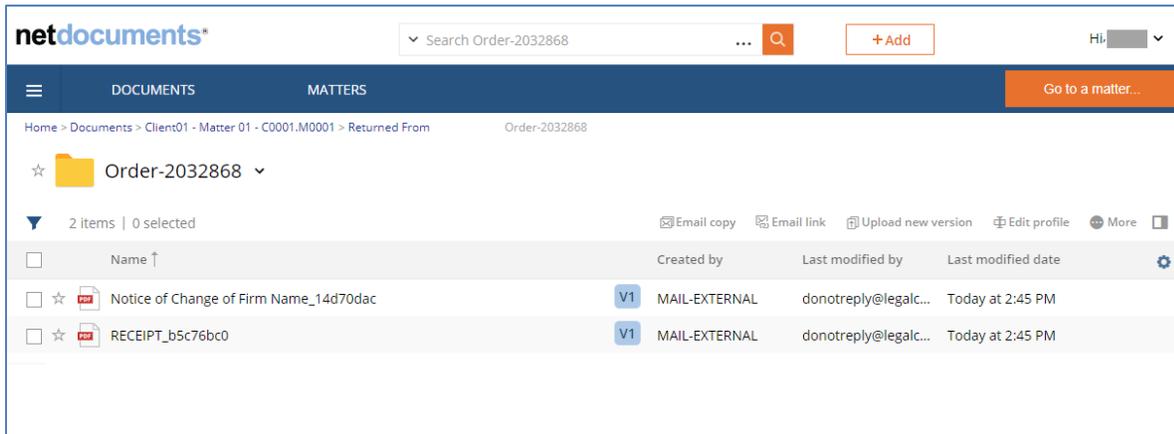
1. Log in to your NetDocuments account and navigate to the Client and Matter you selected when submitting the eFiling order in LegalConnect. Locate the folder named “Returned from *Service Provider*” where “*Service Provider*” is the name of the LegalConnect Service Provider whose portal you used to submit the eFiling order.



2. In the “Returned from *Service Provider*” folder you will see a list of all LegalConnect orders submitted under this Client and Matter. Locate the proper folder by matching the Order Number assigned when the eFiling order was submitted in LegalConnect.



- In the folder “Order-#####” you will see all documents returned from the court including stamped conformed copies, receipts, and notices as appropriate.



## Frequently Asked Questions

- How do I connect to my NetDocuments account?**
  - Click “Place Order” and start an eFiling order. When you arrive on the “Documents” tab, select a Document Type, and click the “Browse” button. You will see the option to select “NetDocuments”, select this option and a pop-up window will open where you enter your NetDocuments credentials and establish the connection.
- Do I have to enter my NetDocuments credentials every time I submit a new eFiling order?**
  - The length of time that the connection between LegalConnect and NetDocuments stays active is primarily dependent on NetDocuments. If you submit a second eFiling order immediately after the first one you likely will not have to re-enter your NetDocuments

credentials. However longer time periods may require you to allow the connection again. If your NetDocuments credentials are saved by your browser this will make the process quicker as they will automatically populate in the connection pop-up window.

- 3. Does the email address in my LegalConnect account need to match the email address in my NetDocuments account?**
  - a. No. Your NetDocuments email and password do not need to match your LegalConnect email and password. If your NetDocuments credentials are valid the connection will be established.
  
- 4. Can I upload more than 1 document from NetDocuments to LegalConnect in an eFiling order?**
  - a. Yes. Multiple documents can be loaded into LegalConnect from NetDocuments in the same way that you are able to upload multiple documents from your local computer.
  
- 5. What types of files are supported by the integration? Will LegalConnect convert my Microsoft Word files to PDF?**
  - a. All document types currently supported by LegalConnect for upload from your local computer are also supported for upload from NetDocuments including PDF, MS Word, Rich Text Files, and many others. Any file that is not a PDF will be automatically converted to PDF by LegalConnect before being submitted to the court.