



6 Key Benefits of Integrating Document Management with your Practice Management System

netdocuments®



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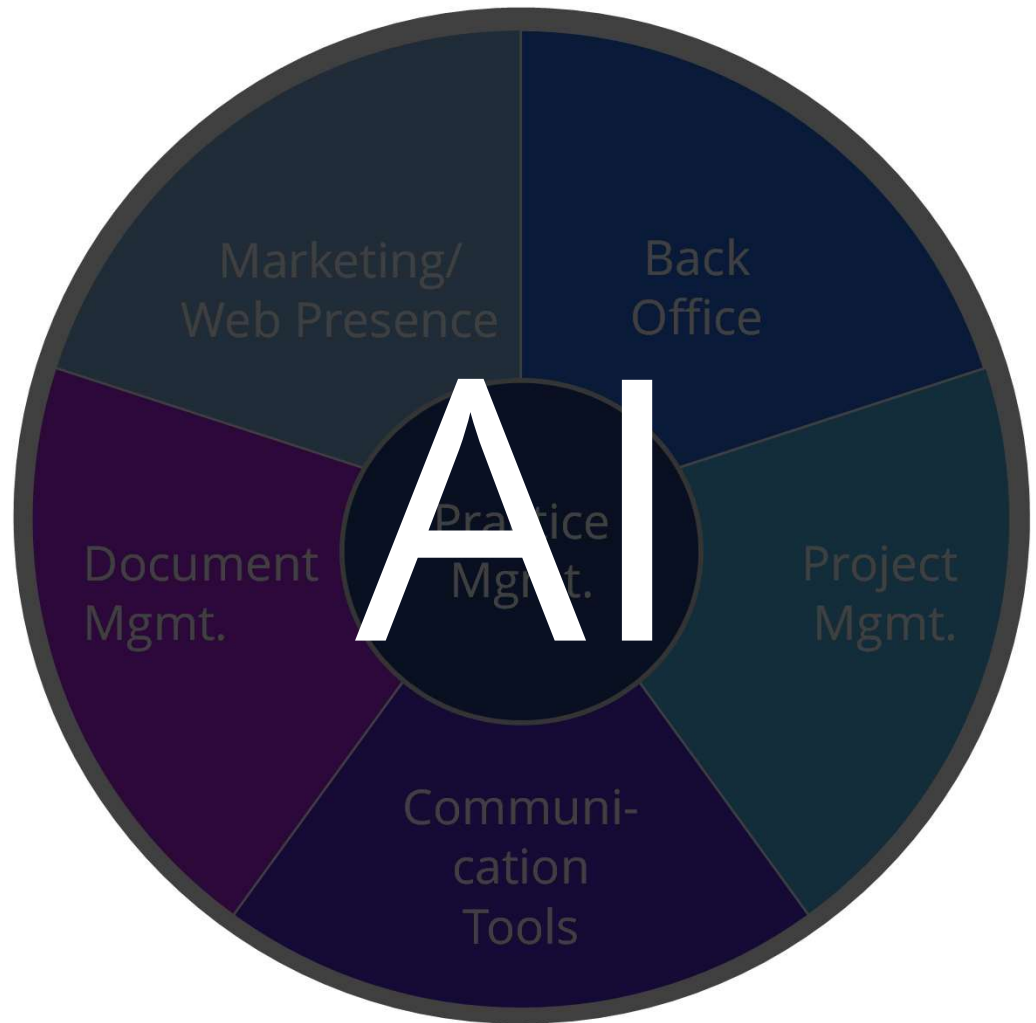


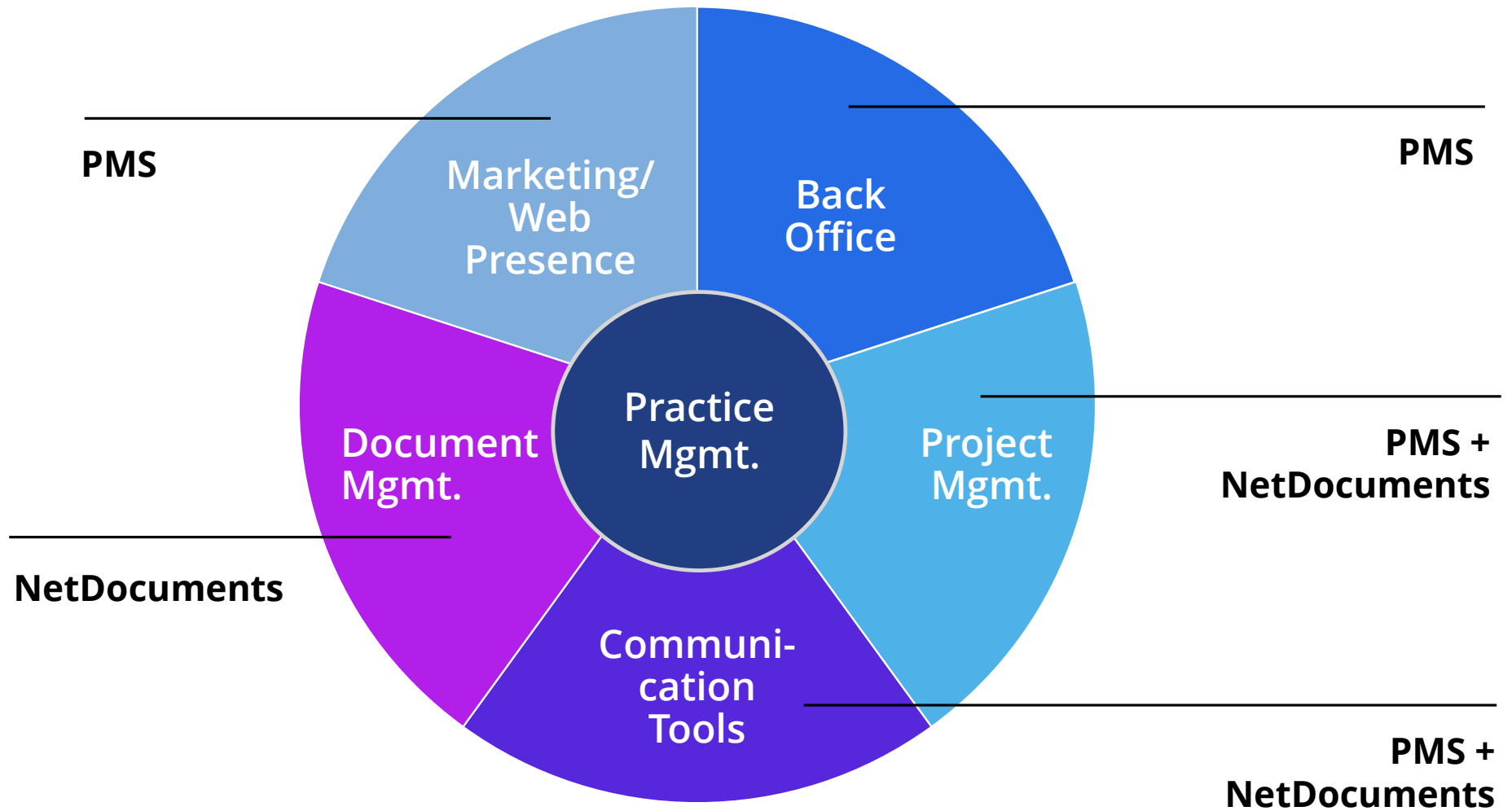
Jake Evans

Solutions Expert Team Lead

NetDocuments

Modern Law Firm Technology Stack





6 Key Advantages of Integrating Practice Management with Document Management



**ONE SYSTEM
OF RECORD**



**EASY-ACCESS
INFORMATION**



FASTER SEARCHES



**SMOOTHER DOCUMENT
WORKFLOWS**



**ONE-CLICK ACCESS
TO BOTH SYSTEMS**



AI + AUTOMATION



**One secure
system of record**

Easy File Navigation

The screenshot displays the NetDocuments web application interface. At the top, the Evans Kissell logo is on the left, and a search bar with the text 'Search Legal Matters' is in the center. To the right of the search bar are buttons for '+ Add' and a settings icon. The user's name 'Hi, Michelle' is in the top right corner. Below the header is a dark blue navigation bar with tabs for 'DOCUMENTS', 'MATTERS', 'MY TASKS', and 'APPS'. A 'Go to a matter...' button is on the right. The main content area is titled 'Legal Matters' and includes a welcome message: 'Welcome to the Client Vault. Contact the information governance team if you have questions or ideas.' The interface is organized into three columns: 'Important Documents', 'Templates', and 'Overviews'. Each column contains a list of items with star icons for favorites. The 'Important Documents' column lists items like 'Union county court', 'Advanced Matter Intake Form', 'SML Registry Settings', 'SMB - Demo Intro Deck Revised 2021', 'SetBuilder', 'SMB Presentation', 'Demo Keys', and 'Condensed Introduction'. The 'Templates' column lists 'Business Templates', 'Litigation Templates', 'Amended and Restated Senior Working Capital Rev...', and 'Emails Saved in the Last 30 days'. Below this is a 'PatternBuilder' section with 'D.R. Horton - Entrada Community Development - 1...', 'Studio Apps', and 'PatternBuilder Max Sample Documents'. The 'Overviews' column lists 'ndmail for Gmail Mac overview', 'eSign Overview', 'ndmail for Gmail PC overview', 'Administrative Analytics', 'Admin Console Sections', 'NetDocuments iPad Overview', 'Matter Analytics', and 'Tasks'.

EVANS KISSELL
O'NEAL & PUGH

Search Legal Matters

...

Hi, Michelle

DOCUMENTS MATTERS MY TASKS APPS

Go to a matter...

Home > Legal Matters

Legal Matters

Welcome to the Client Vault. Contact the information governance team if you have questions or ideas.

Important Documents

- Union county court
- Advanced Matter Intake Form
- SML Registry Settings
- SMB - Demo Intro Deck Revised 2021
- SetBuilder
- SMB Presentation
- Demo Keys
- Condensed Introduction

Templates

- Business Templates
- Litigation Templates
- Amended and Restated Senior Working Capital Rev...
- Emails Saved in the Last 30 days

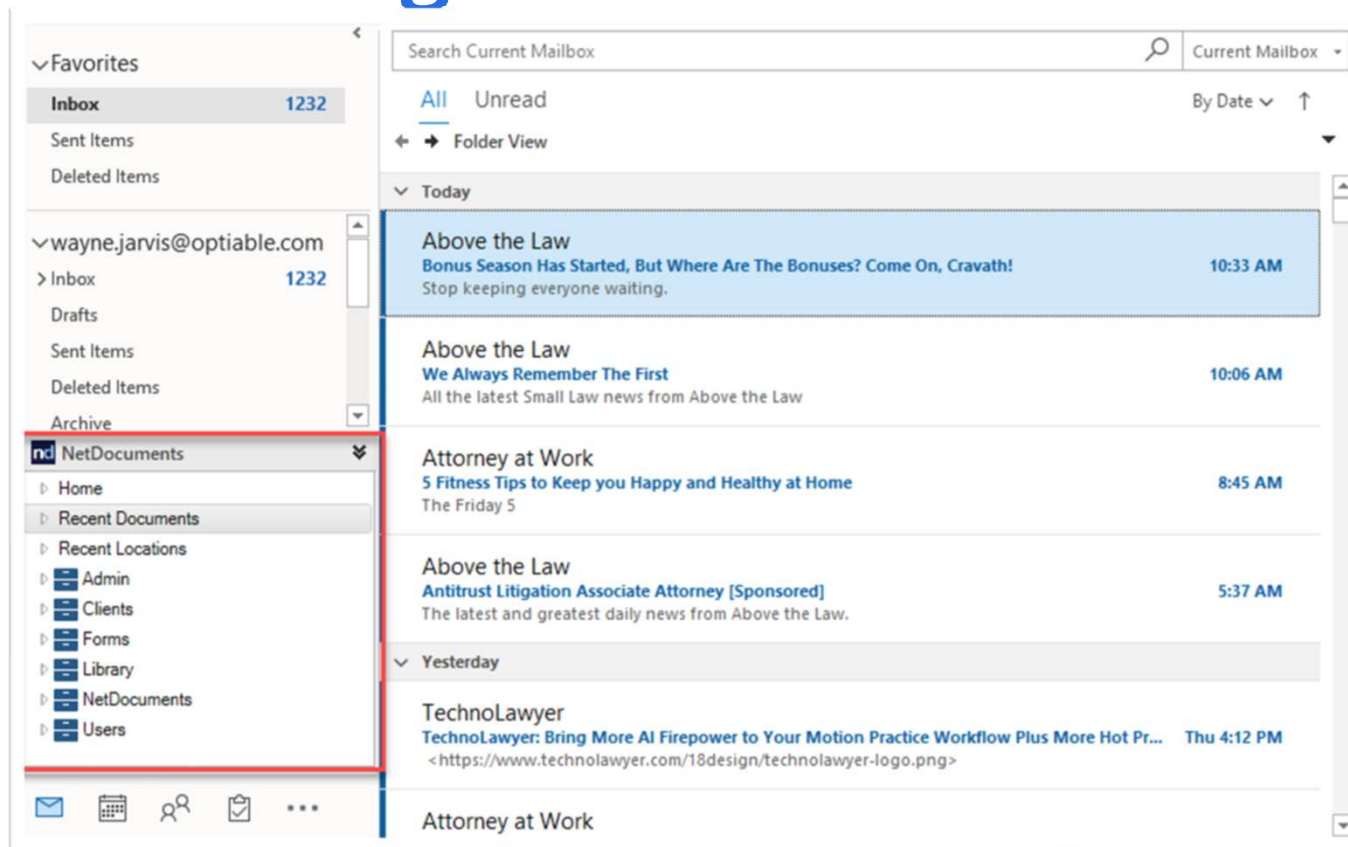
PatternBuilder

- D.R. Horton - Entrada Community Development - 1...
- Studio Apps
- PatternBuilder Max Sample Documents

Overviews

- ndmail for Gmail Mac overview
- eSign Overview
- ndmail for Gmail PC overview
- Administrative Analytics
- Admin Console Sections
- NetDocuments iPad Overview
- Matter Analytics
- Tasks

NetDocuments Email Management in Outlook



Email Management

The screenshot displays the NetDocuments email management interface. The main window shows a list of emails in the 'Today' group, including messages from Ellen Ripley, Denise Bauer, Brad Chase, and Bob Brown. The 'Attach' dialog is open, showing a workspace view with folders like 'Legal Matters', 'Recent Workspaces', and 'Favorite Workspaces'. The 'Pleadings' folder is selected, displaying a list of legal documents. The 'Edit Attachments' dialog is also open, showing a list of attachments with checkboxes for renaming, reordering, and converting to PDF. The 'Insert as' options are set to 'Link'.

NetDocuments Email Management Interface

Top Bar: View, Add-ins, Help, ndMail, DocsCorp, Tell me what you want to do

Quick Steps: Reply, Reply All, Forward, Meeting, More, Respond, ND Save, Save, ND Save, Quick Steps, Move, Rules, Assign Policy, Unread/Read, Categorize, Follow Up, Search People, Address Book, Filter Email

Search Current Mailbox: Search by Name/Subject...

Folder View: All, Unread, By Date, Folder View

Email List:

From	Subject	Received	ND
Ellen Ripley	Procedures for Incremental Em...	Mon 4/13/2020 6:58 AM	
Denise Bauer	Retention Agreement	Mon 4/13/2020 6:52 AM	
Denise Bauer	Korea Office Expansion	Mon 4/13/2020 6:51 AM	
Brad Chase	Lexis-Nexis Trainings: Housto...	Mon 4/13/2020 6:47 AM	
Brad Chase	Transport Proposal for TW o...	Mon 4/13/2020 6:44 AM	
Bob Brown	Spreadsheet for Review - Ne...	Mon 4/13/2020 6:42 AM	
Bob Brown	Updated - Approval Authoriz...	Mon 4/13/2020 6:41 AM	

Attach Dialog:

Legal Matters ▶ FreshMart Supermarket, Inc. - John Doe Slip and Fall Litigation - 5556.00001 ▶ Pleadings

Document Add Folder Go to Workspace

Legal Matters

- Recent Workspaces
- Favorite Workspaces
- Add a workspace
- FreshMart Supermarket, Inc. - John Doe Slip and Fall Litigation - 5556.00001
- Attorney Note
- Client Portal
- Correspondence
- Discovery
- Pleadings

Name/Subject

- Plaintiff's Complaint
- Defendant's Original Answer
- Court Order Denying Summary Judgment
- Defendant's Reply to Plaintiff's Response to Defendant's Motion for Summary Judgment
- Plaintiff's Response to Defendant's Motion for Summary Judgment
- Defendant's Reply to Plaintiff's Response to Plaintiff's Motion for Summary Judgment
- Plaintiff's Motion for Summary Judgment

PROFILE DETAILS Edit

Created by: Michelle Spencer 10/11/2024...

Edit Attachments

Click to rename, drag to reorder, check to convert to PDF

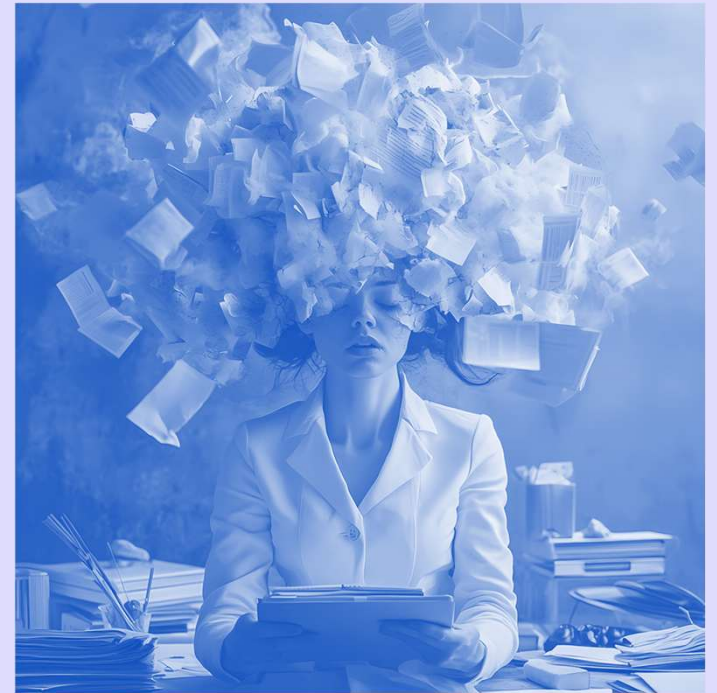
Attachment	Convert to PDF
Background Apps_Auto-Profiling_Launch Planning.docx	☐
Legalweek 2025 Takeaways and Insights.docx	☐

Insert as: ☐ Attachment ☒ Link ☐ Both

OK Cancel

When do you need a modern DMS?

- Already have a legacy DMS
- Over 10 users
- Issues with compliance
- Have over 1M documents
- Remote Workers





**Easy access to
everything you need**

netdocuments®

NetDocuments Workspace

The screenshot displays the NetDocuments Workspace interface for the law firm McArthur Shook Nieves Smart & Hanson. The user is logged in as Brian. The interface shows a navigation bar with 'DOCUMENTS', 'MATTERS', and 'MY TASKS'. The current view is 'DOCUMENTS' for the matter 'Ironsides Works - John Doe v. Ironsides Works - 15000.1502'. A blue box highlights the 'Email' folder, which contains a list of documents. The 'Email' folder is expanded, showing a list of documents with checkboxes, star icons, and document details. The documents listed are:

- Ironsides Client Files (V1) Email From Kyle Kissell (kkissell@demo-netdocs.com) on 4/7/2021 Document ID: 4830-4276-1188
- ND2 (V1) Email From Keith Schneider (keith@netdocuments.com) on 9/9/2010 Document ID: 4819-8507-6827
- Alan's Request for Production (V1) Email From Alan Landes (alandes@netdocuments.com) on 9/9/2010 Document ID: 4816-4953-2507
- When Terrorism Met Golf (V1) Email From Global Golf Post (globalgolfpost@texterity.com) on 9/6/2010 Document ID: 4813-4754-2619
- Documents needed (V1) Email From Marc Duncan (marc@netdocuments.com) on 8/25/2010 Document ID: 4845-1837-0907

Below the 'Email' folder, the 'Correspondence' folder is also expanded, showing a list of documents:

- Client (Last modified by Brian Aiken on 5/6/2021 Document ID: 4815-9479-7288)
- Nathan Correspondence (V2) Last modified by Joshua Vallem on 5/12/2021 Document ID: 4823-9533-0025
- new doc (V2) Last modified by Julie Kavner on 2/4/2020 Document ID: 4848-6114-2963
- Will File Index - Margaret Dittman SPDF (V2) Last modified by Ty Everton on 5/24/2019 Document ID: 4833-7771-6827
- 5 Year Third Amended and Restated Revolving Credit Agreement dated as of November 12 2015 - The Bank of Tokyo-Mitsubishi UFJ, LTD. (V3) Last modified by Ty Everton on 3/19/2019 Document ID: 4841-3502-1709

On the right side, the 'Agreement' and 'Forms & Templates' folders are also expanded, showing their respective document lists. The 'Agreement' folder contains documents like 'Thomas Jacobs Notes', 'Name this document', 'Formation Template', 'Tys New Client', and 'Tys New Document for Demo'. The 'Forms & Templates' folder contains documents like 'Motion & Response Templates', 'Client Invoice Template', 'KD Dowlen 444, Inc. BY-LAWS', 'Form 13-7 (Form PTO-1390)', and 'Form 13-7 (Form PTO-1390)'.

Working with Documents

The screenshot displays the NetDocuments web interface. At the top, there's a navigation bar with 'DOCUMENTS', 'AREAS', 'MY TASKS', and 'APPS'. A search bar labeled 'Search ND Corporate' and a '+ Add' button are also present. The user is logged in as 'Michelle'. Below the navigation bar, the 'Recent Documents' section is visible, showing a list of documents with columns for 'Name', 'Total Versions', and 'Created by'. A context menu is open over the first document, 'SML Edition - The Secret to Cha...', listing actions like 'Open in', 'Check in', 'Download', 'Edit profile', 'Email copy', 'Email link', 'Deliver a secured link', 'Share externally', 'Go to workspace', 'View document URL', 'Modify access', 'Move/Copy', 'Print', 'Rename', 'Send to application', 'View in browser', and 'Customize menu'. The 'Email link' option is highlighted. To the right, a 'VERSION DETAILS' panel for the selected document shows 'VERSION HISTORY (1)' with a version 'V1' dated '9/9/2021 11:08 AM' and an 'Official' status.

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Search ND Corporate

+ Add

Hi, Michelle

DOCUMENTS AREAS MY TASKS APPS

Go to an area...

Home > Recent Documents

Recent Documents

Show: All 40 items | 1 selected

Open in
Check in
Download
Edit profile
Email copy
Email link
Deliver a secured link
Share externally
Go to workspace
View document URL
Modify access
Move/Copy
Print
Rename
Send to application
View in browser
Customize menu

40 items | 1 selected

Total Versions

Created by

Michelle Chandler
Michelle Spencer
Michelle Spencer
Michelle Spencer
Reid Cram
Michelle Spencer
Reid Cram
Reid Cram

SML Edition - The Secret to Cha...

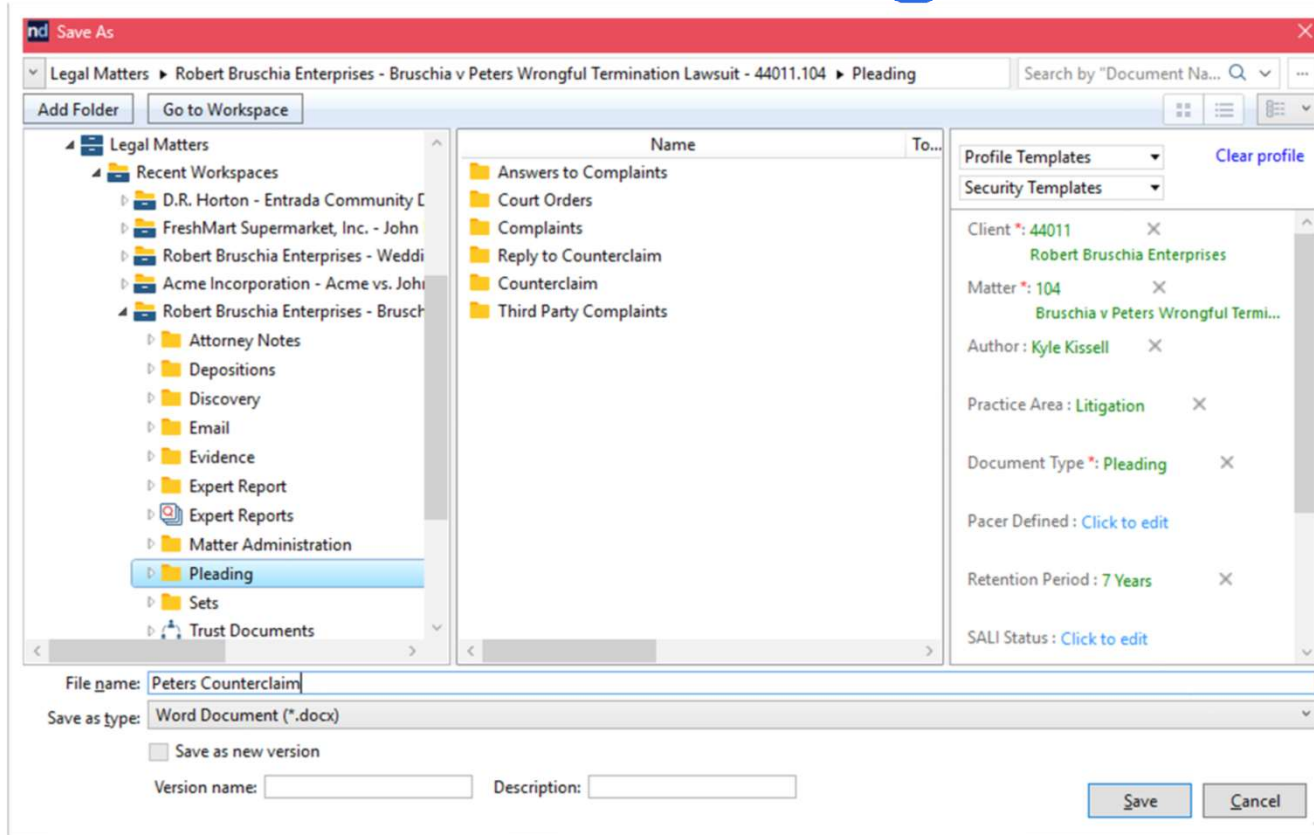
Full View

VERSION DETAILS

VERSION HISTORY (1)

V1
9/9/2021 11:08 AM
Official

M365/GSuite Integration



NetDocuments Embedded in Teams

The screenshot illustrates the NetDocuments integration within a Microsoft Teams environment. On the left, the Teams sidebar shows a list of teams, with 'Test' selected. The main pane displays the 'General' channel of the 'Test' team, which is integrated with NetDocuments. The NetDocuments interface shows a search bar and tabs for 'DOCUMENTS', 'MATTERS', and 'MY TASKS'. The 'DOCUMENTS' tab is active, displaying a list of documents for the 'Diayo Corp - Logan Inc Acquisition (01234-56789)' matter. The document list includes files such as 'Law around the world - January 2022 -- LD', 'Anchor Text Test Agreement', 'Test Signature - Anchor', 'legal-contract-docx', 'PDFTRON_about', and 'Another Signed Document'. An inset shows a chat conversation where a NetDocuments document titled 'Mutual Confidentiality Agreement (Signed)' is shared. The document metadata includes 'Created By: Amanda Brady', 'Last Modified By: Amanda Brady - 4/20/22', 'Version: 2 of 2', and 'Type: PDF'. Action buttons 'Preview', 'View in Netdocuments', and 'Check Out' are visible.

3



**Find exactly what
you need quickly.**

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NetDocuments Home Page

The screenshot shows the NetDocuments Home Page interface. A blue navigation bar at the top contains the NetDocuments logo, a search bar labeled "Search ND Corporate", a "+ Add" button, and a user greeting "Hi, Michelle". Below the navigation bar, a dark blue sidebar on the left features a menu with "DOCUMENTS" and "AREAS" highlighted. A dropdown menu is open under "DOCUMENTS", showing "RECENT" and "FAVORITE" options. To the right of the sidebar, a list of "Favorite Items" is displayed, including "Marketing - General", "Marketing - Go-To-Market Plans", "Marketing - Message Frameworks", "Marketing - Project Briefs & Content Reviews", "Marketing - Marketing Admin", "Marketing - Analysts", "Marketing - Competitive Intelligence", "Marketing - Product Training", "Marketing - Research", and "Marketing - Sales Enablement Work in Progress". Further right, a section titled "Product and Other Workspaces" lists various workspaces such as "Product Management - General", "Product Management - Documentation", "Product Management - Products", "Product Management - UX", "Engineering - SetBuilder Team", "Partner Program - General", "Partner Program - Training", and "Michelle Spencer's Personal Workspace". At the bottom right, a "Sales Workspaces" section lists "Sales - Sales Enablement". A blue box highlights the "DOCUMENTS" menu and its dropdown. Another blue box highlights the "Go to an area..." button in the top right corner. A third blue box highlights the search bar. The footer contains copyright information: "Copyright © 1996-2023 NetDocuments Software Inc. All rights reserved. | Terms of Use | Privacy Policy".

netdocuments®

Search ND Corporate

+ Add

Hi, Michelle

DOCUMENTS AREAS MY TASKS APPS

RECENT

FAVORITE

Go to an area...

Favorite Items

- ★ SML Edition - The Secret to Change Management_H...
- ★ Slide Decks
- ★ Small Market Task Force Deck
- ★ NetDocuments Slide Deck - Full Bank of Slides
- ★ Webinars
- ★ Inspire 2023
- ★ ILTACON 2023
- ★ ILTACON 2023 Show Plan
- ★ SetBuilder Bugs
- ★ Webinars

Product and Other Workspaces

- ★ Product Management - General
- ★ Product Management - Documentation
- ★ Product Management - Products
- ★ Product Management - UX
- ★ Engineering - SetBuilder Team
- ★ Partner Program - General
- ★ Partner Program - Training
- ★ Michelle Spencer's Personal Workspace

Sales Workspaces

- ★ Sales - Sales Enablement

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Advanced Search

Page Layout

DocumentsEmailAll

Cabinet(s)

Evans ONeal & Pugh Legal Matters ✕

Folder

Research

☒

Search subfolders

☒

Document ID

Everything

Search versions

☐

Name / Subject

Search version names

☐

Client

{1013}

...

Matter

{101}

...

Practice Area

...

Document Type

...

Author

...

Jurisdiction

...

Office

...

Confidential Data

...

Comments

Created / Imported by

Me

Created / Imported date

-

▼

Modified / Sent by

Me

Modified / Sent date

-

▼

File extension

Cancel

Search

Search by 12-digit document ID. Valid formats are 1234-1234-1234 or 123412341234. Separate multiple IDs with a space. All other fields are ignored when using this field.
[Clear this field](#) to use the other search fields.

Version Control

The screenshot displays the NetDocuments interface. On the left, a table lists documents with their names and total version counts. The document 'Bahama Bucks Contract Agreement' is selected, showing it has 5 versions. On the right, a sidebar titled 'VERSION DETAILS' for the 'Bahama Bucks Contract Agreement' shows a list of versions. A red rounded rectangle highlights the 'VERSION HISTORY' section, which includes a settings gear icon and a list of five versions (V2 to V5) with their respective dates, times, and status labels like 'Official'.

Name ↑	Total Versions
☐ ☆ PDF Approval of Stock Option Grants	1
☐ ☆ Aryanna Document	1
☐ ☆ Austin Client Intake	1
☒ ☆ Bahama Bucks Contract Agreement	5
☐ ☆ Bens agreement	4
☐ ☆ Berman Fink ASP pt 10 29 10	1
☐ ☆ PDF Bill-of-Sale	1
☐ ☆ Brandi Correspondence	1
☐ ☆ Bruschia Enterprises Escrow Agreement	1
☐ ☆ Carlin Smart - Engagement Letter	1
☐ ☆ Cease and Desist - Elon Musk	2

VERSION DETAILS

☐ VERSION HISTORY (5) ⚙️

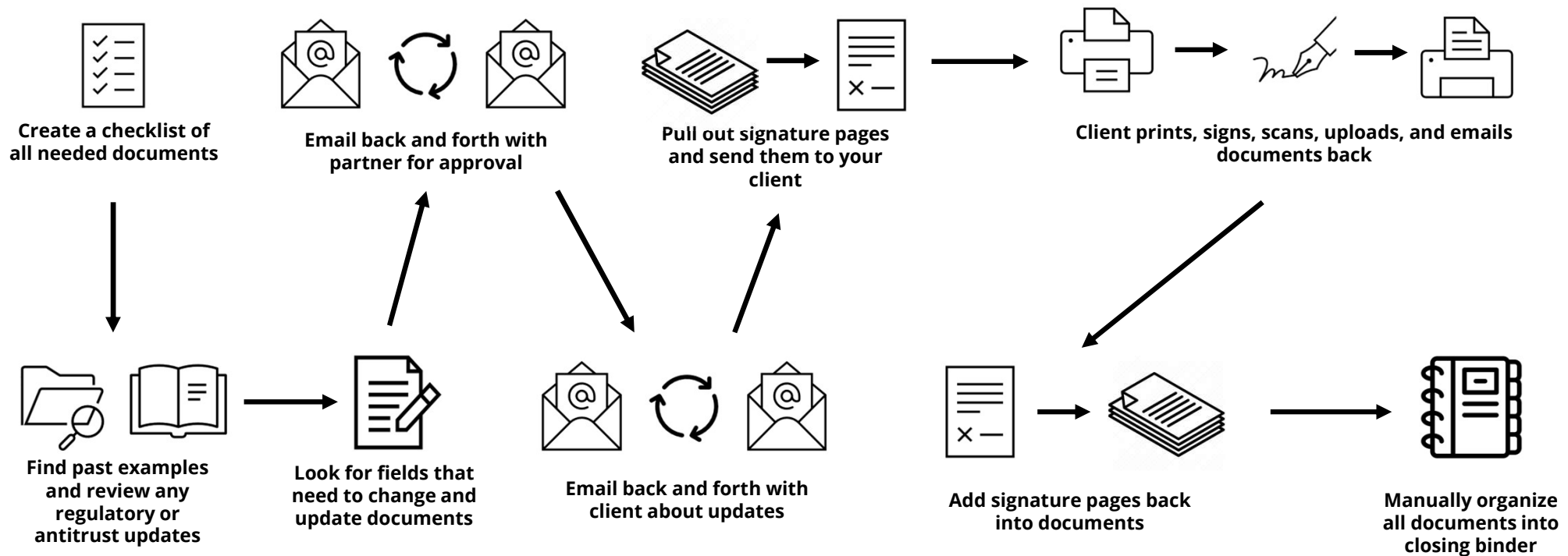
- ☐ V5 changed date to ... **Official** 3/13/2024 12:26 PM
- ☐ V4 Kyle's version 4/5/2023 3:25 PM
- ☐ V3 6/24/2020 12:16 PM
- ☐ V2 6/23/2020 4:29 PM



**Faster document
workflows.**

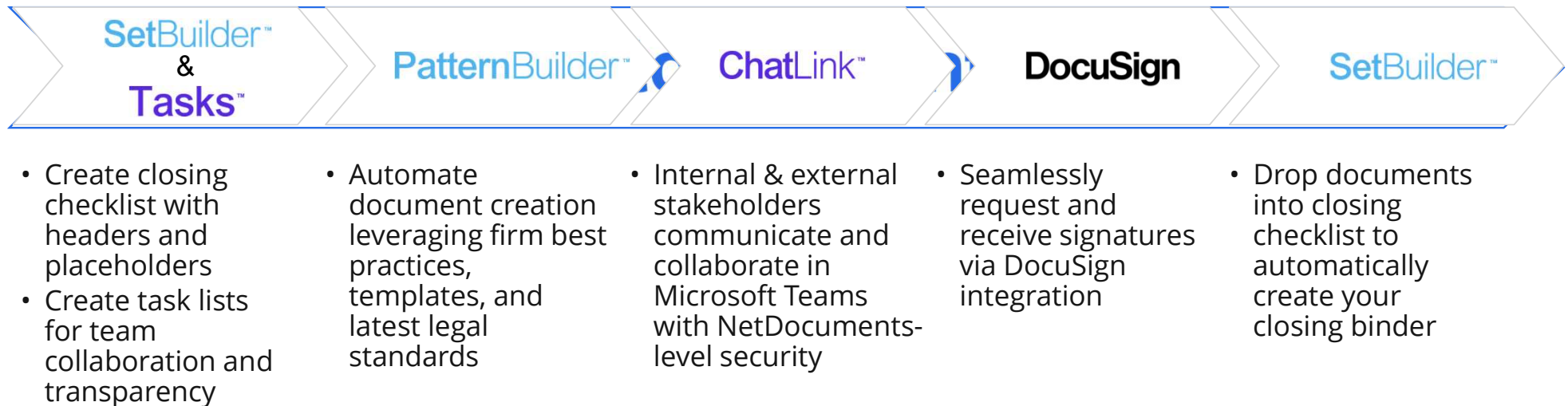
Traditional Transactional Workflow

Numerous manual steps, poor productivity, lack of visibility, disparate data sources



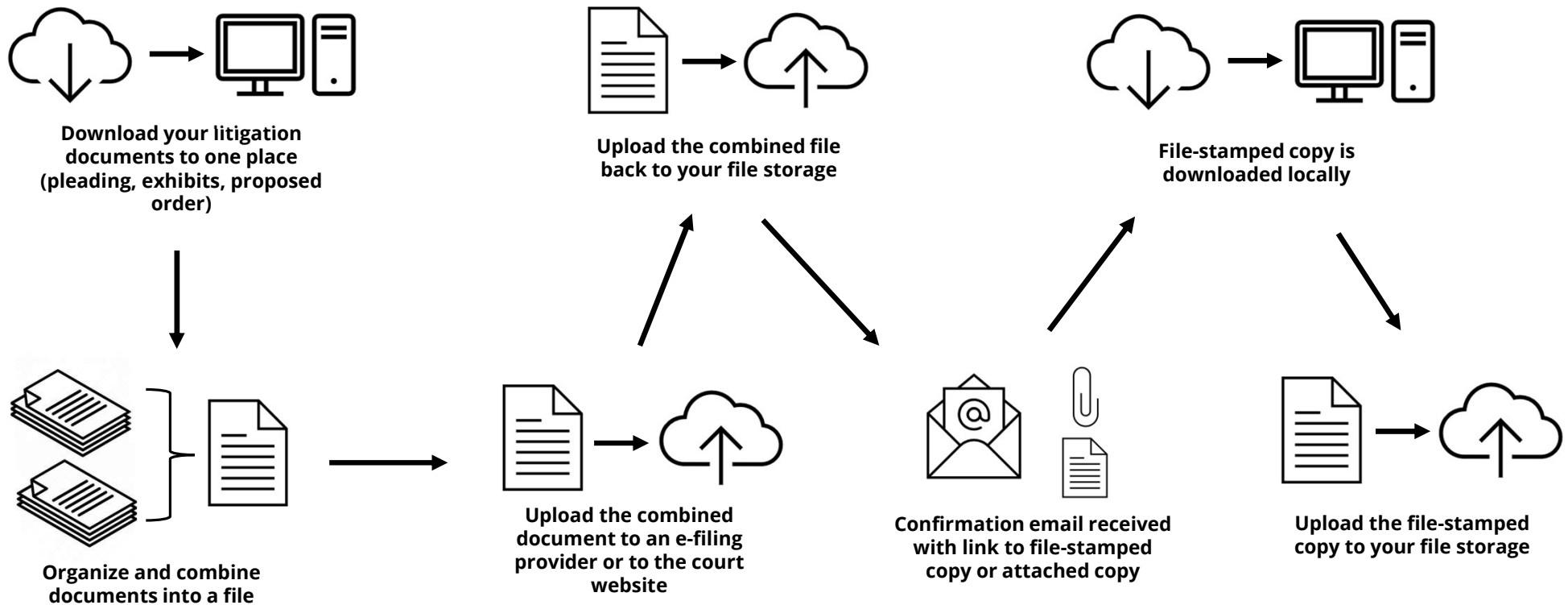
The NetDocuments Transactional Workflow

Increased speed and efficiency, greater oversight, secure and centralized data



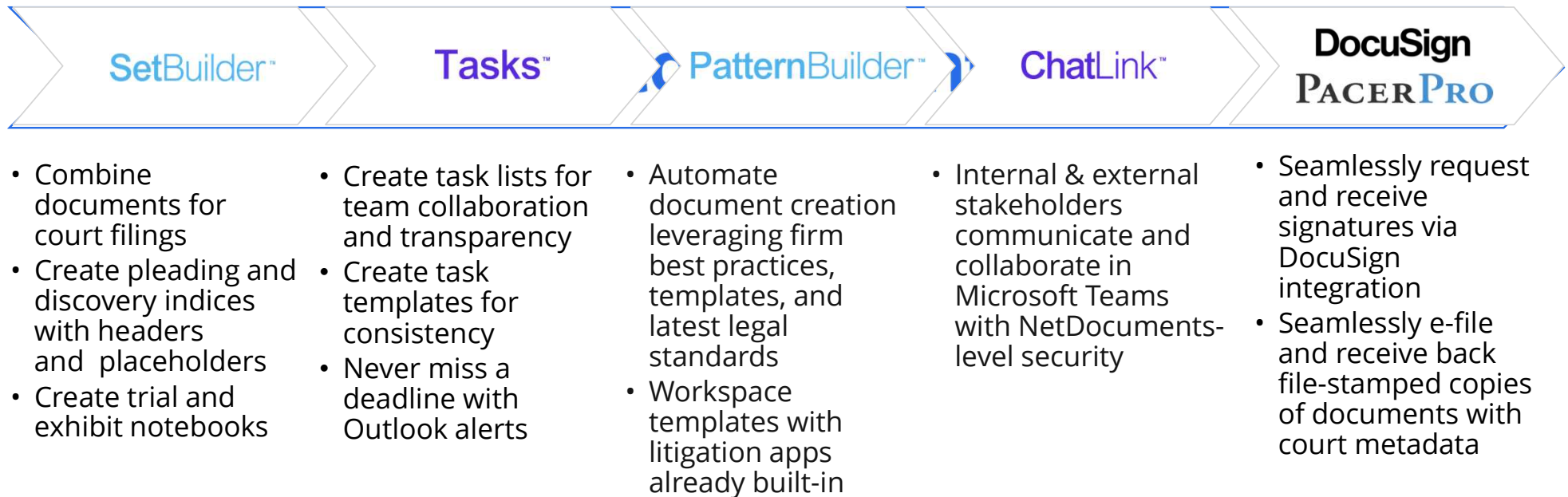
Traditional Litigation Workflow

Numerous manual steps, poor productivity, lack of visibility, disparate data sources



The NetDocuments Litigation Workflow

Increased speed and efficiency, greater oversight, secure and centralized data





**One-click access
to both systems.**

Pick Your LPMS Partner

Actionstep

CARET Legal

 Centerbase

 ZenCase
A SurePoint® Company

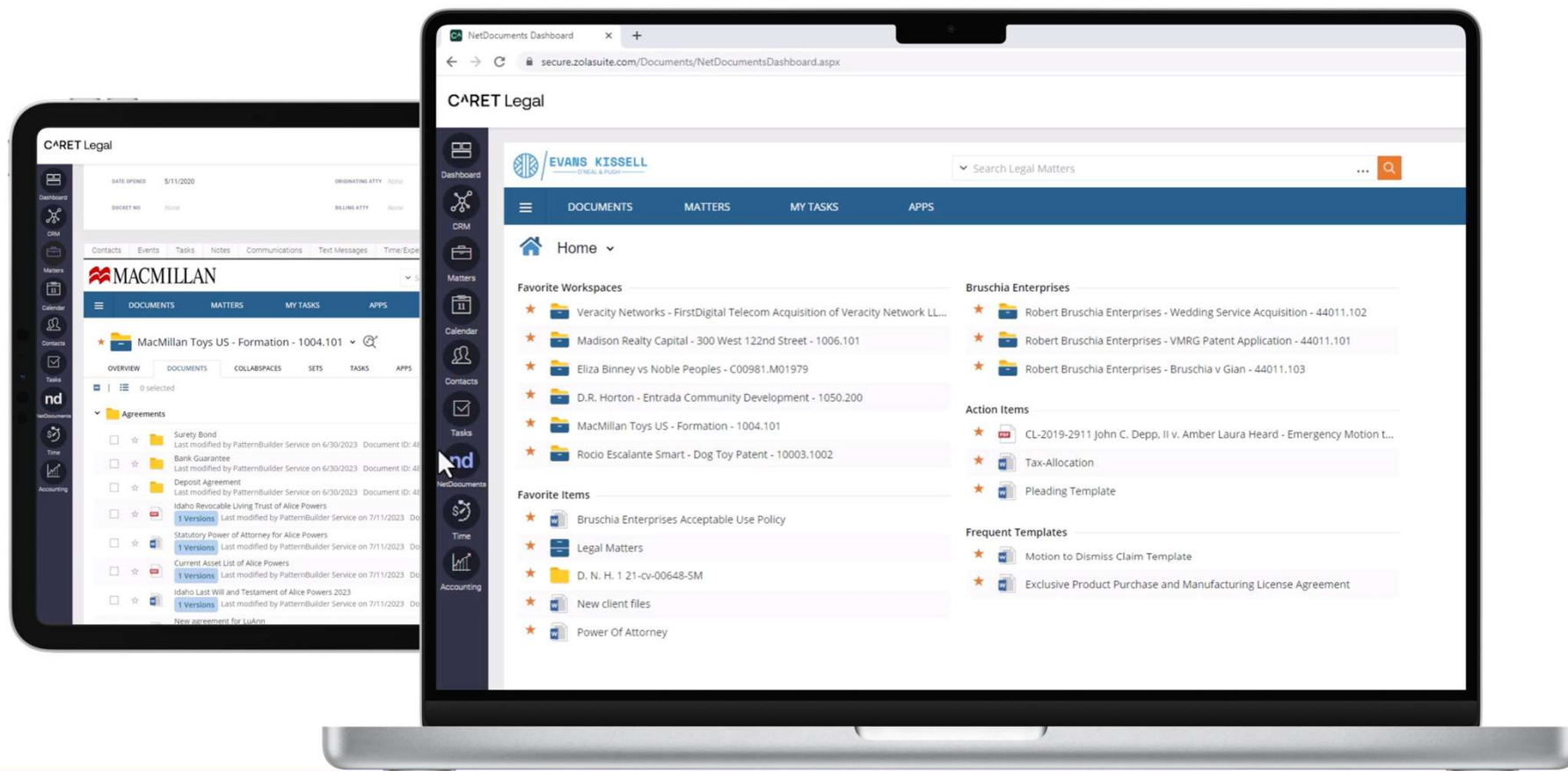
 Clio

 CosmoLex®
by √profitsolv

 Tabs3

netdocuments®

NetDocuments Embedded in CARET Legal



NetDocuments Embedded in Clio

The screenshot displays the Clio interface with the NetDocuments embed. The Clio sidebar on the left contains links to Dashboard, Calendar, Tasks, Matters, Contacts, Activities, Billing, Online payments, Accounts, Documents, Communications, Reports, App Integrations, and Settings. The main Clio header shows the matter name '162003-24-Adidas' and a 'Car accident' description. Below the header is a navigation bar with tabs for Dashboard, Custom Fields, Activities, Calendar, Communications, Notes, Documents, Tasks, Bills, Transactions, Clio for Co-Counsel, Medical Records, Damages, Settlement, and NetDocuments by Spring. The NetDocuments embed is a white box with a blue border, containing the NetDocuments logo, a search bar, a '+ Add' button, and a user profile 'Hi, Weston'. Below the header is a navigation bar with 'DOCUMENTS', 'MATTERS', 'MY TASKS', and 'APPS'. The main content area shows a breadcrumb 'Home > Documents > Adidas - 162003-24-Adidas - Car accident - 1959058175.1729064990' and a folder 'Adidas - 162003-24-Adidas - Car accident - 1959058175.1729064990'. Under the 'DOCUMENTS' tab, there are two sections: 'OVERVIEW' with '0 selected' and 'DOCUMENTS' with a list of folders: 'PROD' (0 result), 'POA' (0 result), 'Agreements' (0 result), and 'Correspondence' (0 result). Each folder has an 'Edit' link. Action icons like 'Email copy', 'Edit profile', 'Move/Copy', 'Email link', 'Check in', and 'More' are visible at the top of the document list.

NetDocuments Embedded in ZenCase/SurePoint

Matter: (522) General Matters

All Matters / General Matters

+ Add TagDelete

SETTINGSCONFIGURATIONSMEMBERSSECURITY GROUPSCUSTOM FIELDSINFOCUSTOM RECORDSDATA SETSINTEGRATIONSSYSTEMFILTERS

SETTINGS

HISTORY

netdocuments

NetDocuments

Manage your documents using NetDocuments.

[Terms of Service](#) [Privacy Policy](#)

Remove Integration

Integration Settings

REPOSITORY/CABINET Zencase Demo/Demo Account for ND	CLIENT PROFILE ATTRIBUTE Client	MATTER PROFILE ATTRIBUTE Matter	MATTER TYPE PROFILE ATTRIBUTE Matter
MATTER SUB-TYPE PROFILE ATTRIBUTE Matter	JURISDICTION PROFILE ATTRIBUTE	SYNC REVIEWERS No	SEND MATTER CLOSED DATE No
COMBINE MATTER TYPE AND SUBTYPE No			

Edit

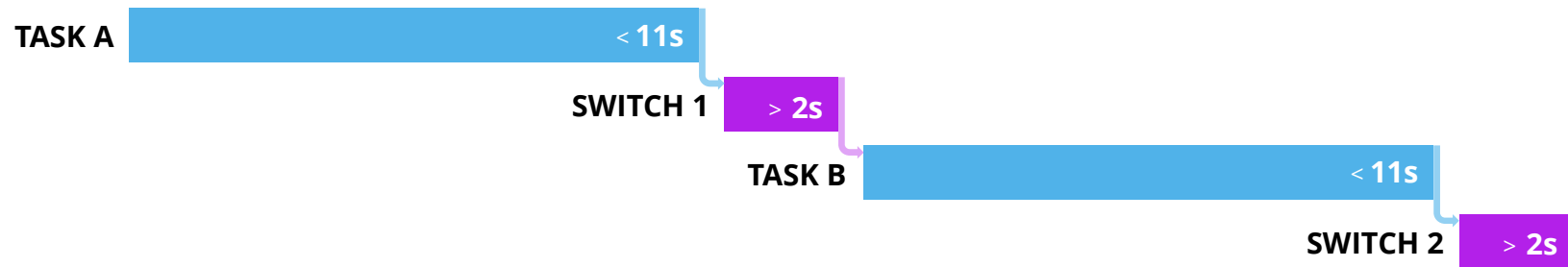
Demo of NetDocuments + PMS Integration



The Toggle Tax

Study: <https://hbr.org/2022/08/how-much-time-and-energy-do-we-waste-toggling-between-applications>

Is this just the cost of doing business in a digital environment?





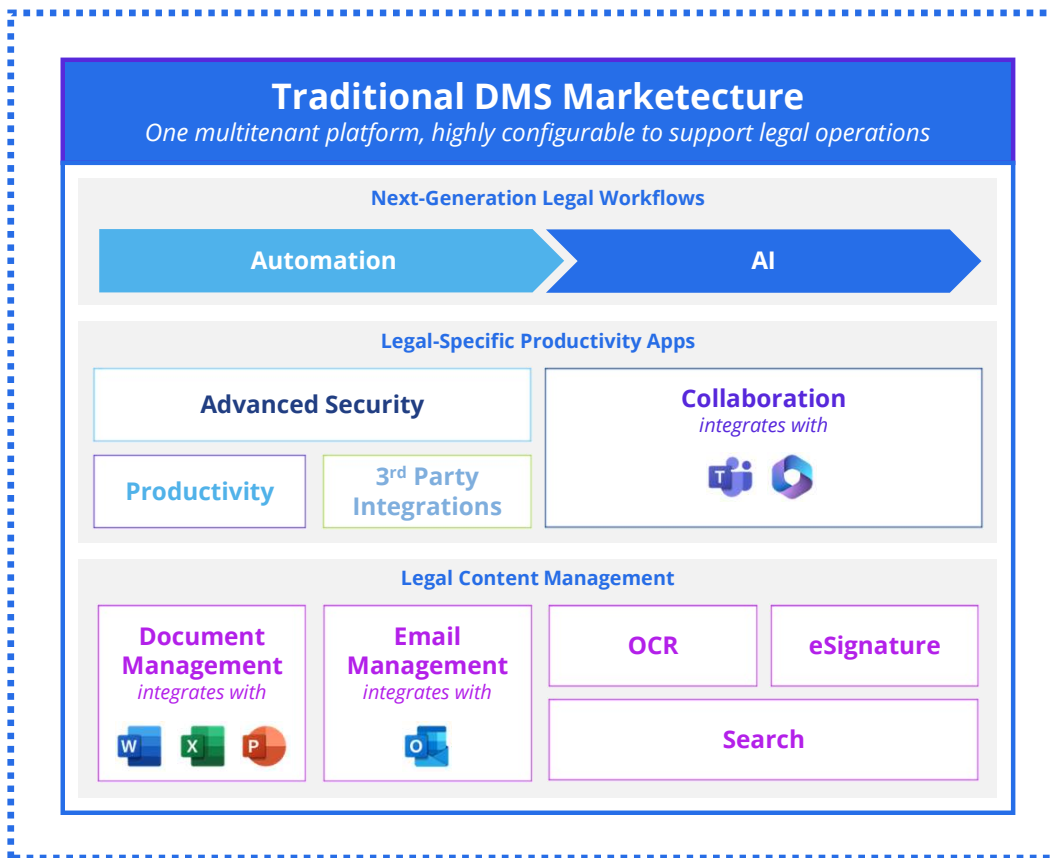
*“[P]eople operate in
“**swivel chair**” roles,
fetching and
transforming data . . .
into other systems.”*



**Unlock the power of
automation & AI.**

netdocuments®

AI Has Changed the DMS Forever



The Intelligent DMS



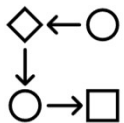
Bring AI to your content, not your content to AI –

Helps avoid data security risks and disrupting user workflows



AI sits on top of your knowledge like a lens –

Magnify, clarify, and extract key insights and answers



AI paired with workflow automation turns answers into actions – Go beyond knowing the answer to doing something with it

Legal AI Assistant

Improved Efficiency and Responsiveness

Purchase & Sales Agreements



"What are the remedies upon breach?"

"Is there a key man provision in the PSA?"

"What is the expert witness's educational background?"

Litigation Documents



"Construct a timeline from the facts presented in the selected documents."

"What are the non-compete and non-solicit provisions in this employment agreement?"

Employment Contracts



Government Procurement Contracts



Please list the performance obligations and where they occur."

"What clauses address data security requirements?"

ndMAX Legal AI Assistant

Search FreshMarket Superma...

+ Add

Hi, Jill

DOCUMENTS

MATTERS

APPS

Go to a matter...

Home > Demo Cabinet > FreshMarket Supermarket Inc - John Doe v FreshMart Supermarket Inc

FreshMarket Supermarket Inc - John Doe v FreshMart Supermarket Inc

OVERVIEW

DOCUMENTS

APPS

23 items | 1 selected

Ask AI

Email copy

Email link

Upload new version

Edit profile

More

	Name	Document	Party 1
☐	Pleading - 11 - Court Order Denying Summary Judgment	Motion for Summar...	
☐	Pleading - 10 - Defendant Reply to Plaintiff Response to Defendant Moti...	Reply	
☒	Pleading - 09 - Plaintiff Response to Defendant Motion for Summary Jud...	Reply	
☐	Pleading - 08 - Defendant Motion for Summary Judgment	Motion for Summar...	
☐	Pleading - 07 - Plaintiff Reply to Defendant Response to Plaintiff Motion ...	Reply	
☐	Pleading - 06 - Defendant Response to Plaintiff Motion for Summary Jud...	Motion for Summar...	
☐	Pleading - 05 - Plaintiff Motion for Summary Judgment	Motion for Summar...	
☐	Correspondence - 2 - Plf Counter Offer Letter - \$250,000	Settlement Agreeem...	
☐	Correspondence - 1 - Def Settlement Offer Letter - \$25,000	Settlement Agreeem...	
☐	Deposition - 4 - Fact - Witness, Mark_Thompson	Deposition	
☐	Deposition - 4 - Fact - Witness, Sarah Johnson	Deposition	

Assistant

Untitled Thread

1 Please summarize the pleadings in this case.

The pleadings in the case between John Doe and FreshMart Supermarket, Inc. emphasize the following key points:

1. **Plaintiff's Position:**

- John Doe claims he slipped and fell in the produce section of FreshMart due to water and vegetable debris on the floor. He argues that the lack of a 'Caution Wet Floor' sign and the supermarket's inadequate maintenance constituted a breach of duty by FreshMart, resulting in his injuries, including a fractured wrist and ankle sprain[1].

2 **Defendant's Position:**

- FreshMart contends that they maintained

3

Selected files

What are the strengths and weakness of the plaintiff's case?

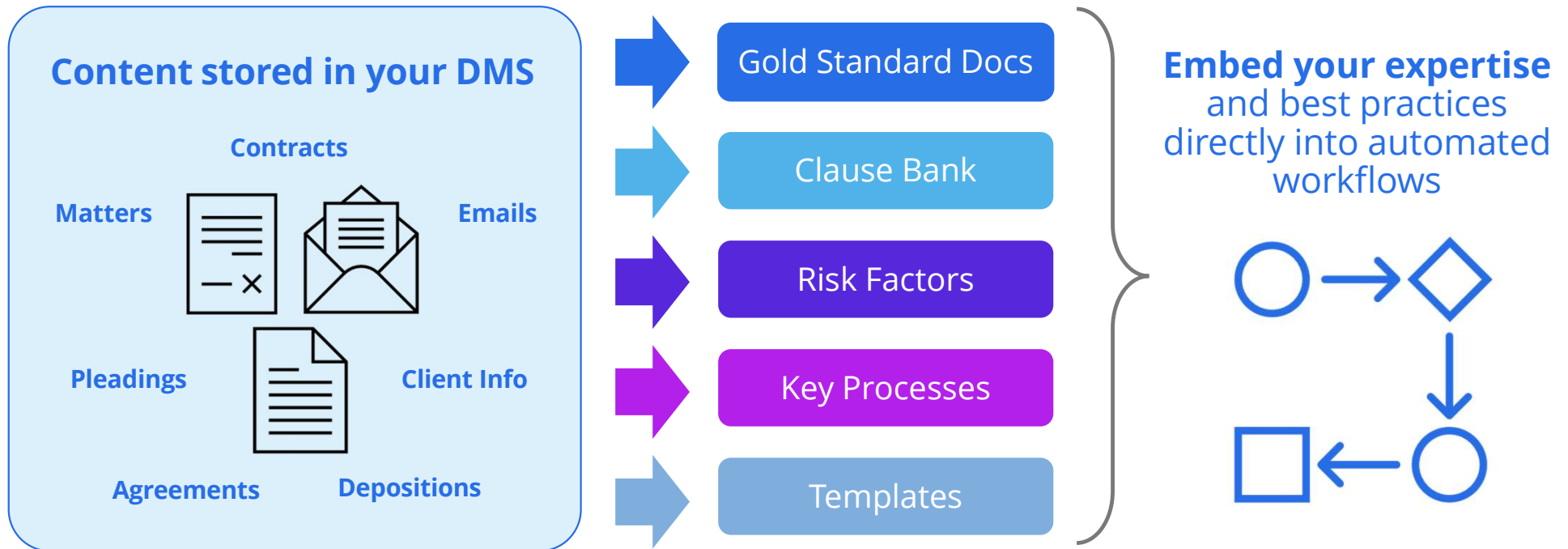
Ask a question

Get the answer

Ask a follow-up question

App Builder and Studio

What about Repeatable Workflows?



nd **MAX** *Legal App Examples*



Contract Playbook Generator

Leverage AI to analyze previous contracts, policies, and clauses, uncovering best practices to create an organizational playbook



Issues List Generator

Automatically identify and organize critical issues from case documents, creating a comprehensive issues list to support legal strategy.



Deposition Summarizer

With a click of button, AI will extract key information and summarize numerous depositions within minutes.

nd MAX Studio

- ✓ Legal Apps
- ✓ Prompt Templates
- ✓ AI Training and Educational Material

The screenshot displays the ndMAX Studio web application. At the top, the 'nd MAX' logo is on the left, and 'Legal Apps Prompt Engineering' is on the right. Below the header, the title 'ndMAX Studio' is prominently displayed. A descriptive paragraph states: 'Discover apps and prompt templates that apply generative AI to a wide range of legal uses cases. The library includes tailored examples for every sector of the legal industry, including law firms, in-house counsel, government agencies, and more.' A horizontal navigation bar contains tabs for 'In-House Counsel', 'Litigation', 'Transactional', 'Criminal', 'Employment', 'Immigration', and 'M&A'. The main content area is divided into three columns. The left column, titled 'IN-HOUSE COUNSEL TRANSACTIONAL', features a 'Compare' section with instructions to 'Compare the two documents selected below. The total length of the two documents selected cannot exceed 200,000 characters (approx. 300 double-spaced pages)'. It shows two document entries: 'Document #1' (In-house Co. - S&P - Offer 1) and 'Document #2' (In-house Co. - S&P - Offer 2). Below this is a 'Complete the following instructions' section with a text input field and a 'Submit' button. The middle column, also titled 'IN-HOUSE COUNSEL TRANSACTIONAL', shows a 'Continue Draft' section with instructions to 'Seamlessly generate suggested language to continue drafting legal documents within Microsoft Word.' and a 'Submit' button. The right column, titled 'TRANSACTIONAL M&A IN-HOUSE COUNSEL', features a 'Contract Risk Analysis' section with instructions to 'Assess contracts for risk based on user-defined criteria and generate a structured risk report.' and a 'Submit' button. Each column includes a user profile picture and name at the bottom: Jennifer Poon for the left and right columns, and Scott Kelly for the middle column. The bottom of the interface shows a navigation bar with tabs for 'LITIGATION CRIMINAL' and 'TRANSACTIONAL LITIGATION'.

nd **MAX** *for Scale*

AI-powered apps for intelligent workflows, deployed at scale

Foundational Capabilities

Extract | Summarize |
Timeline | Compare |
Draft | Translate

Legal Apps

Applied to high-value use
cases, powering
intelligent legal workflows

Background Apps

Actions trigger the
running of apps

ndMAX Studio for Day 1 and Ongoing Value

Turning Actions Into Insights

Enrichment via Background Apps



*Enrich Your **Content***
*Enrich Your **Processes***
*Enrich Your **Experiences***

Imagine if you could...

- Upload a document (or many!) and **automatically classify** and profile them
- Apply an **AI-powered contract playbook** to every document profiled as an NDA
- Automatically **calculate bespoke risk scores** on contracts as part of a due diligence
- Or **compile an ongoing case chronology** with each new document added to a workspace

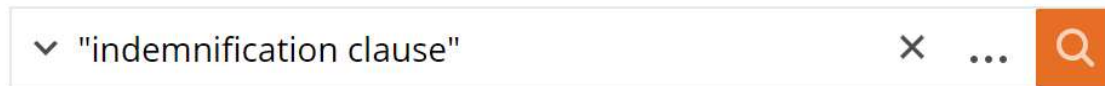
Semantic Search

Coming in 2025!

Lexical Search vs. Semantic Search

Lexical Search
finds what you
tell it to find.

Semantic Search
finds what you
meant to find.



Lexical Search:

- "Indemnification clause"
exact phrase search

Semantic Search:

Understands the concept of indemnification, including different phrases like **"liability protection"** or **"compensation for loss."**

Get Answers, Not Links

The screenshot displays a legal research platform. At the top, a search bar contains the query "changes to composition of Acme Co's board" (labeled 1). Below the search bar, the interface is divided into a left sidebar and a main content area. The sidebar includes "SEARCH CRITERIA" (Cabinet: Matters, Search For: Relevance, Query: How has the composition of Acme Co's board chan...) and a "FILTER" section with various filters like Profile, Client (1), Matter (1), Document Type (0), Area of Law (0), Venue (0), Case Number (0), Created by (3), Last modified by (3), File extension (2), Created date (6), and Last modified date (6). The main content area shows "Search Results" (labeled 2) for the query. It includes a summary of the search results, a list of sources (Acme Co - Bylaws and Certificate of Incorporation, Board Resolution - 2019, 2021 Annual Board Meeting Notes, 2-13-2022 - Resolution), and a list of 100 items. The first item, "Acme Co - Bylaws and Certificate of Incorporation" (labeled 3), is selected and its details are shown in a full view (labeled 4). The details include the document title, a 98% relevance score, and the text of Article XII - Named Board Members, which lists the board members and their roles.

1

2

3

4

Semantic Query

Smart Answer

Relevant Documents

Applicable Text



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