

Overview

The NetDocuments integration with First Legal's eFiling portal 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 portal 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 the portal.
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.

Connecting NetDocuments to LegalConnect

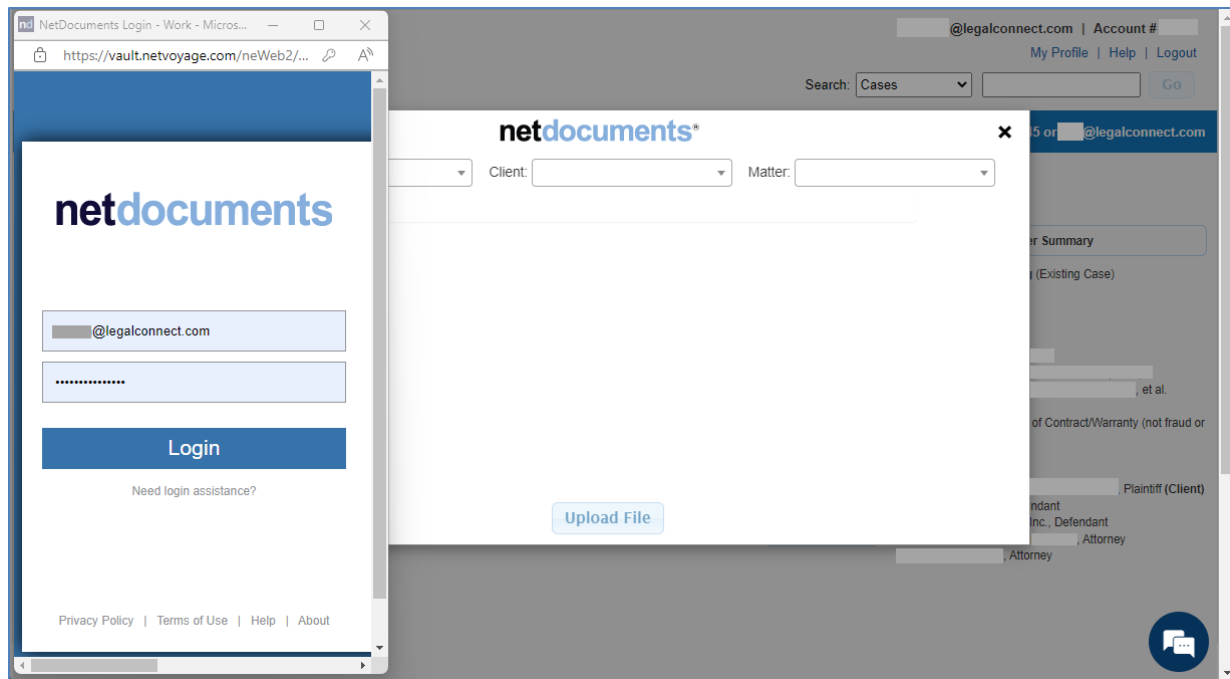
Customers placing an eFiling order will see the option on the Documents tab. After selecting to upload a file from NetDocuments, the user will be prompted to make the connection. Note: Only customers who have a NetDocuments account will be able to make the connection and use the integration

1. From the "Documents" tab of an eFiling order, after selecting a Document Type, click the down arrow next to the "Upload from Computer" button then "NetDocuments".

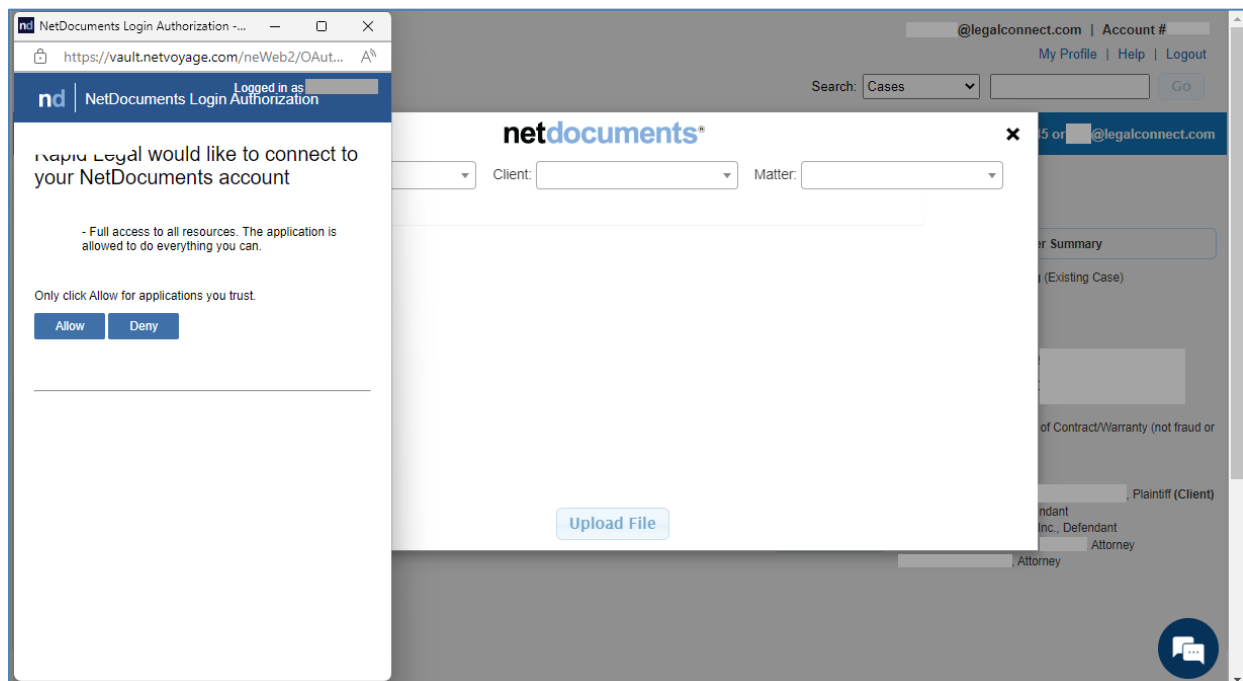
The screenshot displays the First Legal eFiling portal interface. At the top, the 'FIRSTLEGAL Development' logo is on the left, and account information (Account #, My Profile, Logout) is on the right. A search bar is also present. Below the header, a navigation bar includes 'Place Order', 'Manage Cases', 'Pending Orders', and 'Closed Orders'. The main content area is titled 'What would you like us to do?' with a dropdown menu set to 'eFiling'. The 'Documents' tab is selected, showing a form with two main sections: '1. Select Document Type' and '2. Upload File'. In the 'Select Document Type' section, the 'Contains' radio button is selected, and a search box for document types is visible. In the 'Upload File' section, the 'Upload from Computer' button has a dropdown menu open, showing the 'NetDocuments' option. To the right of the main form is an 'Order Summary' panel for an 'eFiling (Existing Case)', displaying details like County (Los Angeles), Case Info (Case Number, Case Name), Category (Civil Unlimited), and Case Type (Other Breach of Contract/Warranty). At the bottom of the form, there are 'Previous', 'Next', and 'Save As Draft' buttons.



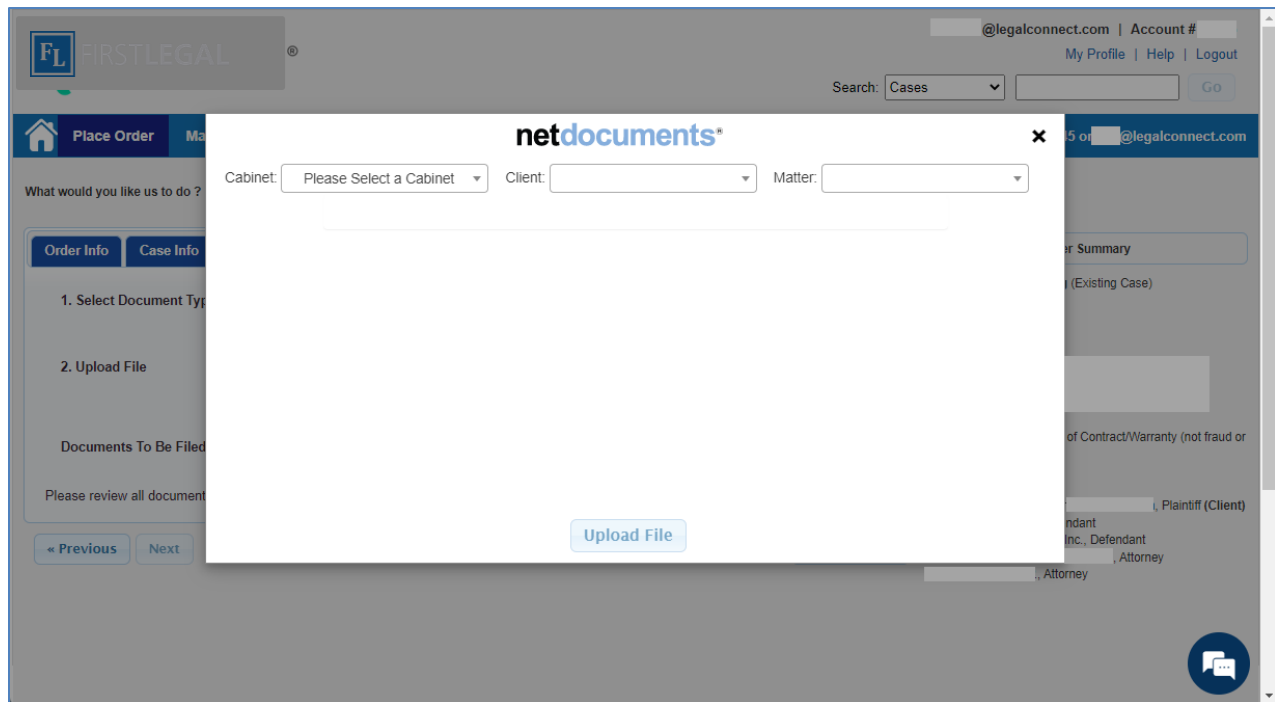
2. A pop-up window will open asking the user to enter their NetDocuments credentials.



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



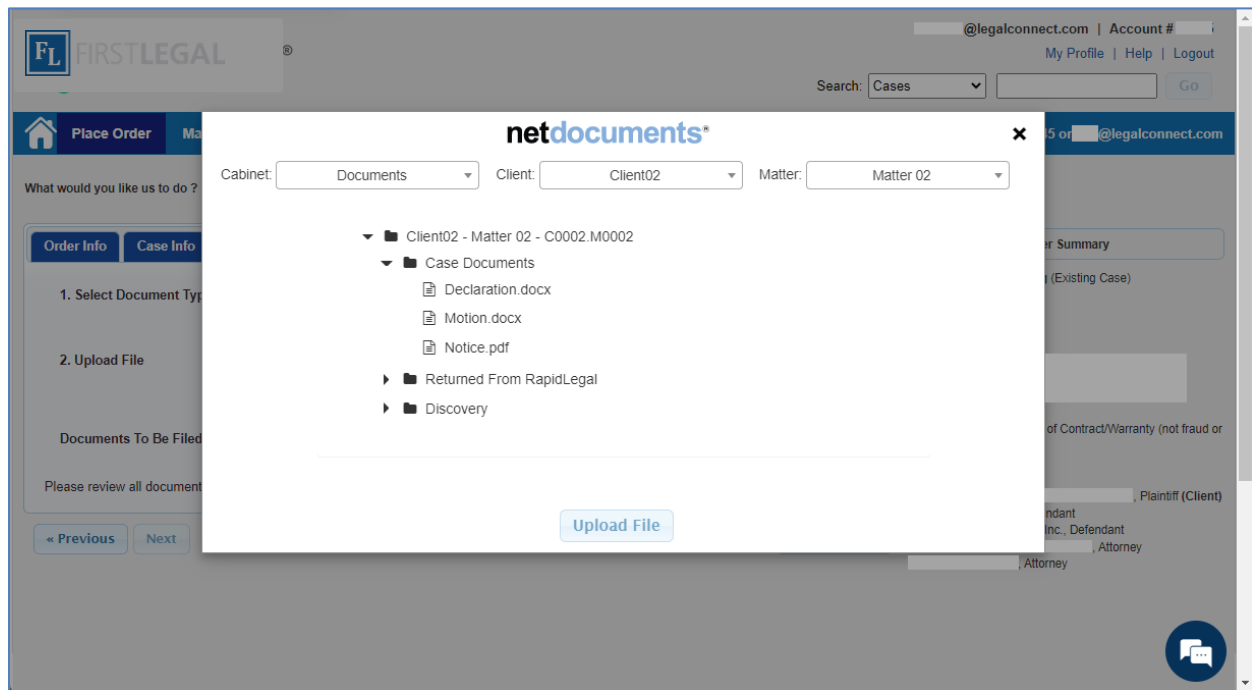
4. Once the connection is allowed, the pop-up window closes, and the user returns to the eFiling order workflow and sees the NetDocuments file selection window.



Uploading a Document to the eFiling Portal from NetDocuments

5. After establishing the connection between the portal 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 the portal, 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.

The screenshot displays the NetDocuments eFiling portal interface. At the top, there are tabs for 'Order Info', 'Case Info', 'Case Participants', 'Documents', 'Court Fees', and 'Order Details'. The 'Documents' tab is active.

1. Select Document Type
Radio buttons for 'Contains' (selected) and 'Starts With'. A search bar for 'Search for a Document Type' with a link 'or, Pick from list'.

2. Upload File
A 'Browse' button.

Documents To Be Filed

A document entry for 'Notice (name extension) (Notice.pdf) Lead Document' is shown, marked as 'COMPLETE' with a red 'X' icon.

FILED ON BEHALF OF *
Dropdown menu for 'Plaintiff: ...'.

REFERS TO (PARTY) *
Dropdown menu for 'Defendant: ...' and 'Defendant: ...'.

DOCUMENT TITLE *
Text input field containing 'Notice of Notice'. Below it, 'Remaining Characters: 239'.

☒ Lead Document

Please review all document details prior to submission. To prevent rejection, please ensure that all documents are text searchable.

Navigation buttons: '< Previous', 'Next', and 'Save As Draft'.

Order Summary
eFiling (Existing Case)
County: Los Angeles
Case Info:
Case Number: [redacted]
Case Name: [redacted], et al.
Category: Civil Unlimited
Case Type: Other Breach of Contract/Warranty (not fraud or negligence)
Case Participants:
[redacted] Plaintiff (Client)
[redacted] Defendant
[redacted] Defendant
[redacted] Attorney
[redacted] Attorney

Viewing Documents Returned from the Court

When utilizing the integration between NetDocuments and First Legal's eFiling portal, all standard functionality for court returned documents is still available. Court returned documents will be viewable in the "Deliverables" tab on the eFiling portal, and you will receive the email from First Legal 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 the portal. Locate the folder named "Returned from First Legal".



netdocuments®

Search Client02 - Matter 02 - C0002.M0002

+ Add

Hi. [User] ▾

DOCUMENTS MATTERS

Go to a matter...

Home > Documents > Client02 - Matter 02 - C0002.M0002

☆ Client02 - Matter 02 - C0002.M0002 ▾

OVERVIEW DOCUMENTS

0 selected

Email copy Email link Upload new version Edit profile More

- PROD 0 result Edit
- AGR 0 result Edit
- Discovery 2 results Edit
- Returned From RapidLegal ~9 results Edit
- Case Documents 3 results Edit

- In the “Returned from First Legal” folder you will see a list of all First Legal orders submitted under this Client and Matter. Locate the proper folder by matching the Order Number assigned when the eFiling order was submitted in the portal.

netdocuments®

Search Reti

+ Add

Hi. [User] ▾

DOCUMENTS MATTERS

Go to a matter...

Home > Documents > Client02 - Matter 02 - C0002.M0002 > Returned From

☆ Returned From ▾

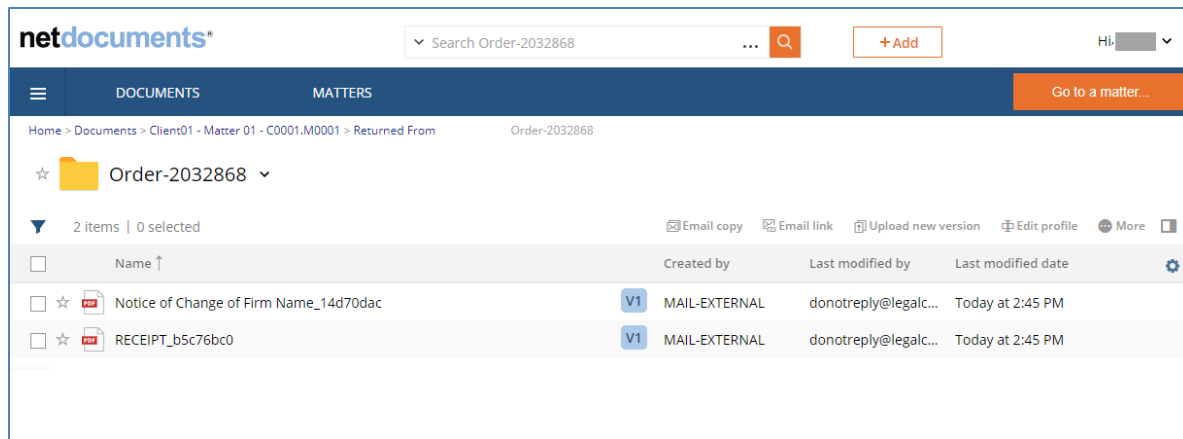
9 items | 0 selected

Email copy Email link Upload new version Edit profile More

<input type="checkbox"/>	Name ↑	Created by	Last modified by	Last modified date
<input type="checkbox"/>	☆ Order-123456			9/9/2022 10:54 AM
<input type="checkbox"/>	☆ Order-2022173			10/1/2022 12:17 PM
<input type="checkbox"/>	☆ Order-2023042			10/4/2022 3:48 PM
<input type="checkbox"/>	☆ Order-2023600			10/6/2022 11:10 AM
<input type="checkbox"/>	☆ Order-2023627			10/6/2022 11:58 AM
<input type="checkbox"/>	☆ Order-2023637			10/6/2022 12:28 PM
<input type="checkbox"/>	☆ Order-2023641			10/6/2022 2:10 PM
<input type="checkbox"/>	☆ Order-2030219			10/27/2022 7:39 PM
<input type="checkbox"/>	☆ Order-2031617			11/3/2022 1:07 PM



3. 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

1. How do I connect to my NetDocuments account?

- a. 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.

2. Do I have to enter my NetDocuments credentials every time I submit a new eFiling order?

- a. The length of time that the connection to 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 First Legal account need to match the email address in my NetDocuments account?

- a. No. Your NetDocuments email and password do not need to match your First Legal 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 the portal in an eFiling order?

- a. Yes. Multiple documents can be loaded 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 First Legal convert my Microsoft Word files to PDF?

- a. All document types currently supported by First Legal 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 the portal before being submitted to the court.

