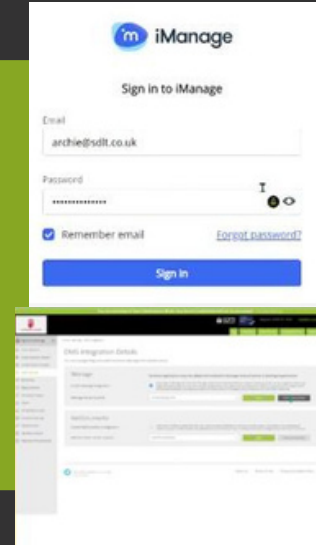
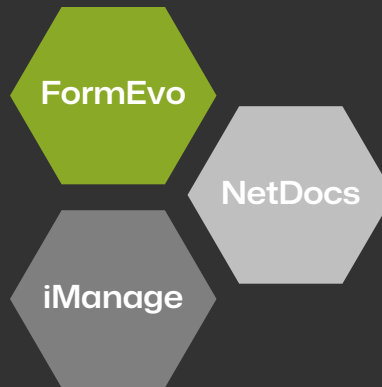


DMS Integration

Access documents directly in just two clicks.

Seamless integration with **iManage** and **NetDocs** meaning users access documents directly from the iManage or NetDocs DMS in just two clicks, saving a significant amount of time and administrative work for users



FormEvo's DMS Integration is now available with both iManage and NetDocuments.

FormEvo's DMS integration uses "Code Grant Authentication" which is an OAuth2.0 flow - an authorisation protocol used by server-hosted integrations to obtain an access token. Giving firms who use FormEvo cloud-based legal forms along with iManage or NetDocuments these key benefits:

Protected User Information

There are no concerns about which staff have access to specific information, as the information barrier settings are directly mirrored from the DMS into FormEvo.

Two types of DMS Record

The integration provides two types of DMS records:

- A single source-of-truth clickable URL linking to either a draft or finalised form
- A point-in-time snapshot of the draft as its content is being developed

Version Control

Version control is clearly reflected in the naming convention of the PDF and/or URL, making it easy for users to review files at a glance. This approach captures multiple versions of a form and allows all amendments to be tracked effectively.

Security

No security concerns over a 3rd party app holding access details to your data, should that 3rd party ever have a "data integrity question mark or worse yet, a data breach.

Snapshot PDF

A snapshot PDF is a fully open, self-contained document that remains accessible regardless of where it was generated—think of it as a long-life version of a PDF.

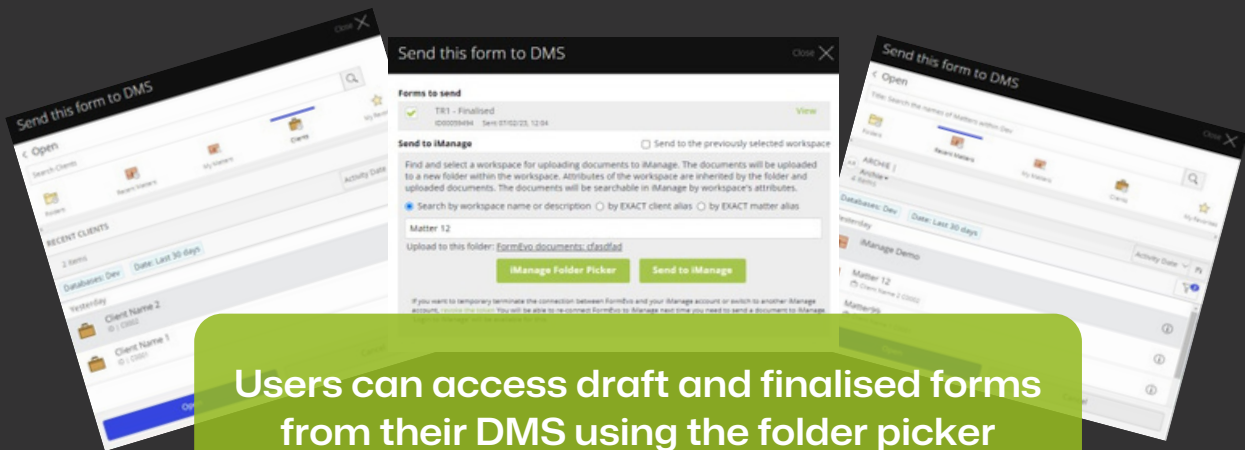
There is no dependency on maintaining an active FormEvo account to access or use the PDF within your DMS. Once a form is finalised, a link and/or PDF of the completed document is saved for future reference.

FormEvo Version Wizard

The FormEvo Version Wizard is an easy-to-use comparison tool which lets you upload and capture multiple versions of a form so you can track any amendments made along the way and by whom.

Seamless legal forms integration

FormEvo's cloud-based legal forms integration with iManage and NetDocuments means thousands of law firms can benefit from simpler and more efficient document production. For more information about how this technology could work for your firm, please contact FormEvo.



Take a closer look at how FormEvo keeps forms accurate

Request a demo or a sales quotation

Tel 0330 555 9341 Email sales@formevo.co.uk Web formevo.co.uk

