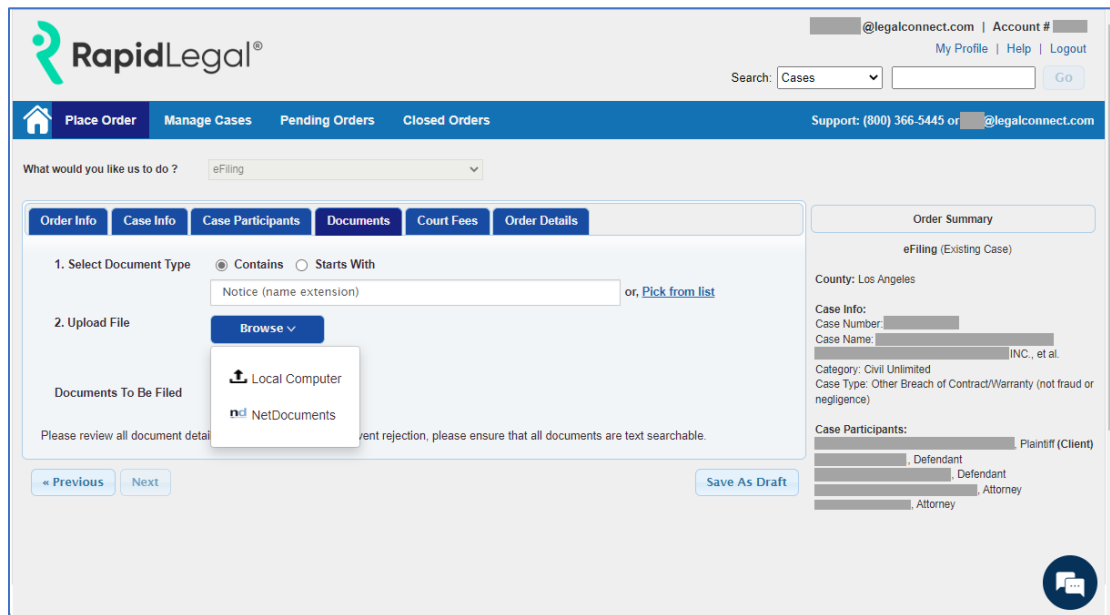# Activating and using NetDocuments in your Rapid Legal Account

When the NetDocuments integration is enabled, you will see the NetDocuments option on the Documents tab when placing an eFiling order.

(Please note: Only Rapid Legal customers who have a NetDocuments account will be able to make the connection and use the integration.)
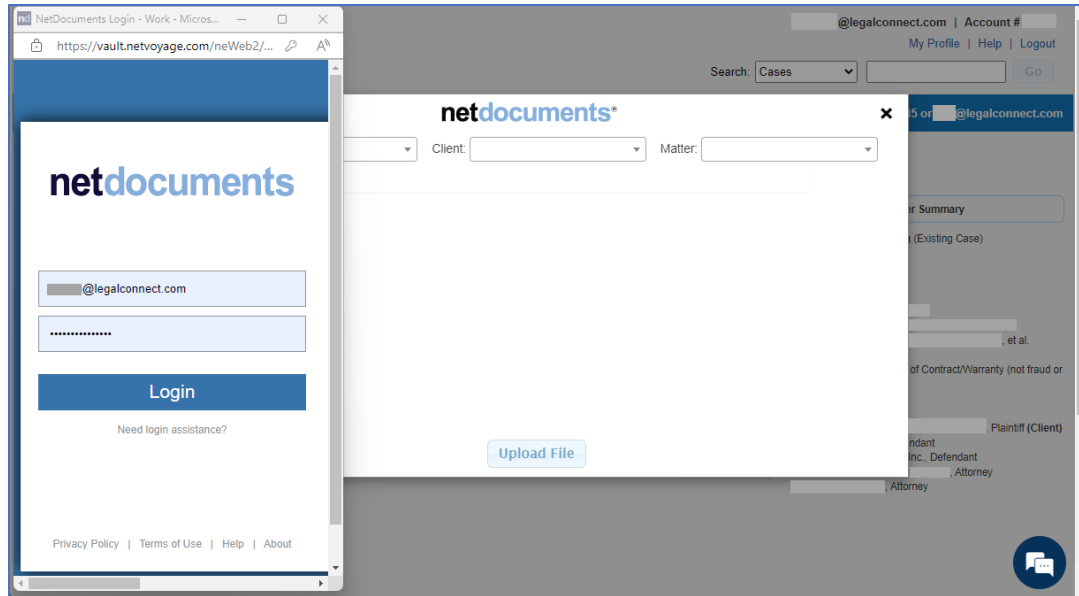
After selecting to upload a file from NetDocuments, the user will be prompted to make the connection.

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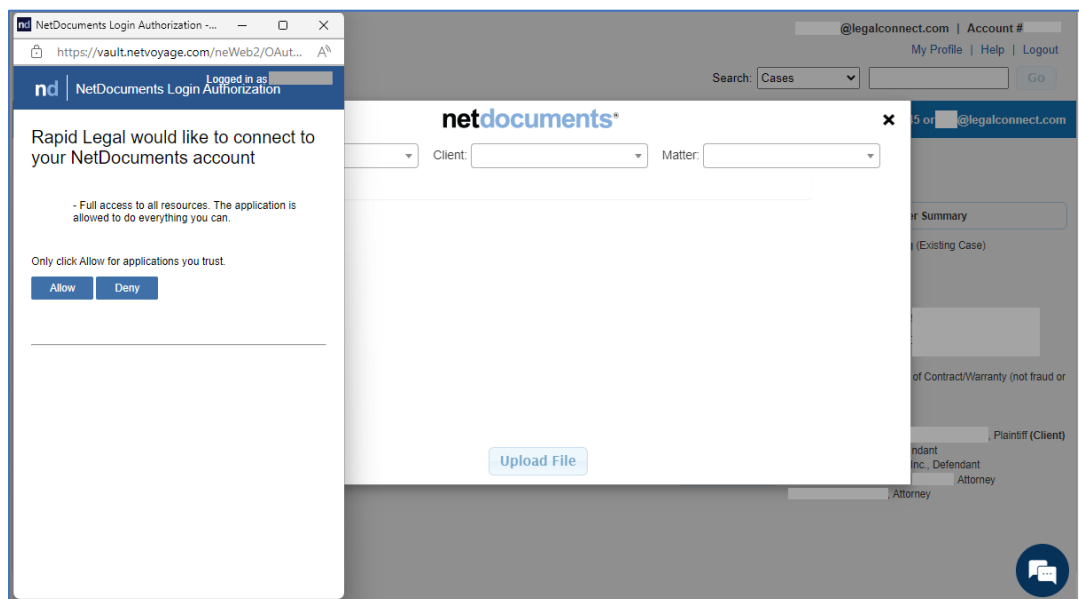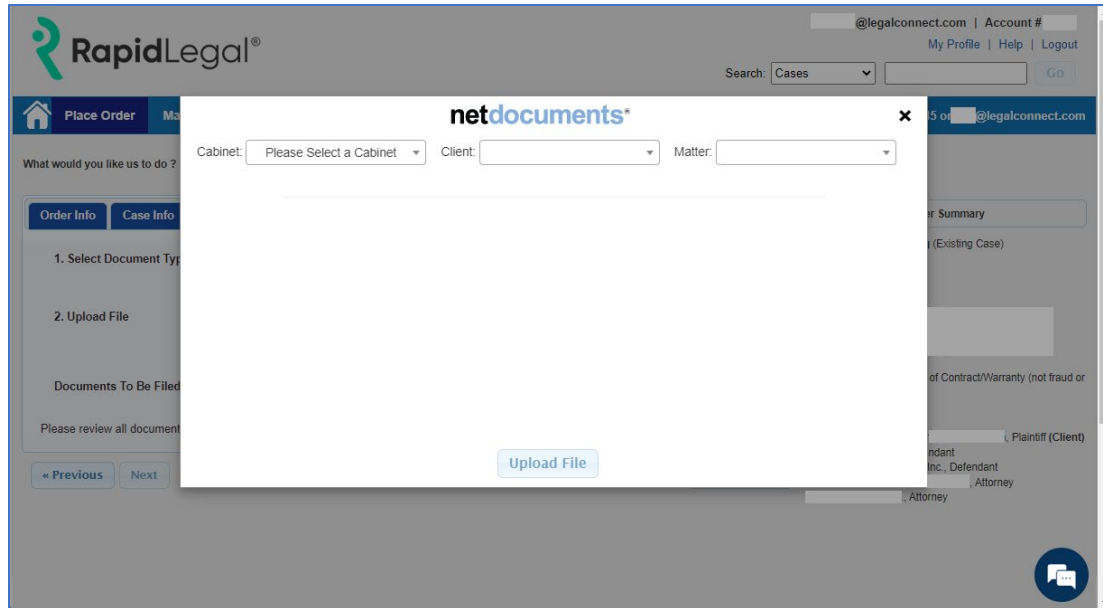


2. A pop-up window will open asking you to enter your NetDocuments credentials.

3. After providing your NetDocuments credentials, you will be asked to allow the connection to your NetDocuments account.



4. Once the connection is allowed, the pop-up window closes, and you will be returned to the Rapid Legal order process and see the NetDocuments file selection window.
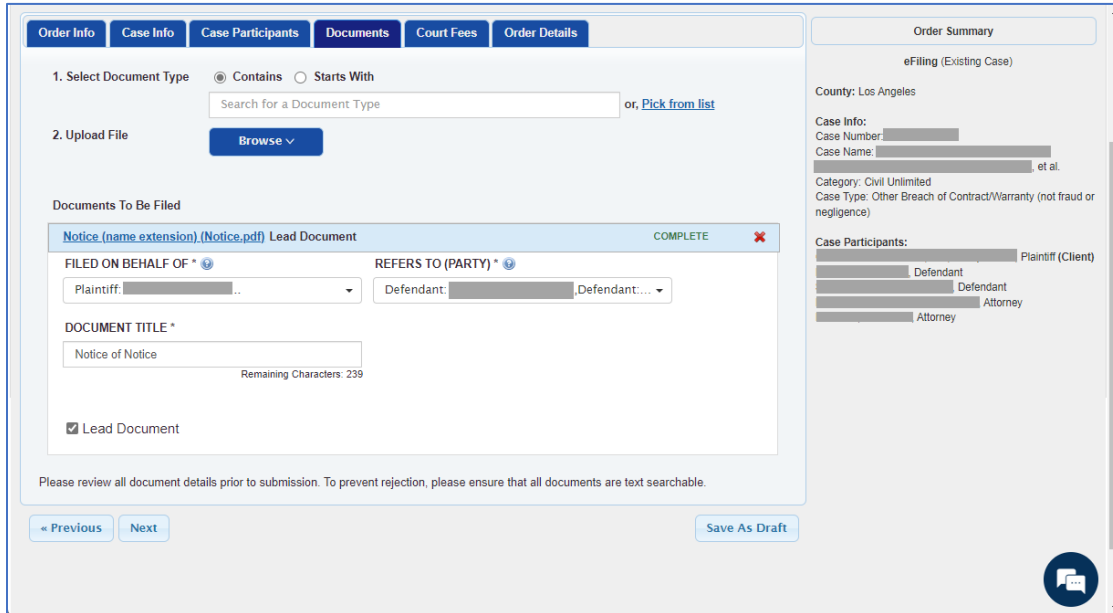
## Uploading a Document to Rapid Legal from NetDocuments

5.  After establishing the connection between Rapid Legal and NetDocuments, you can browse to a NetDocuments Cabinet, Client, and Matter and see the folders and files.
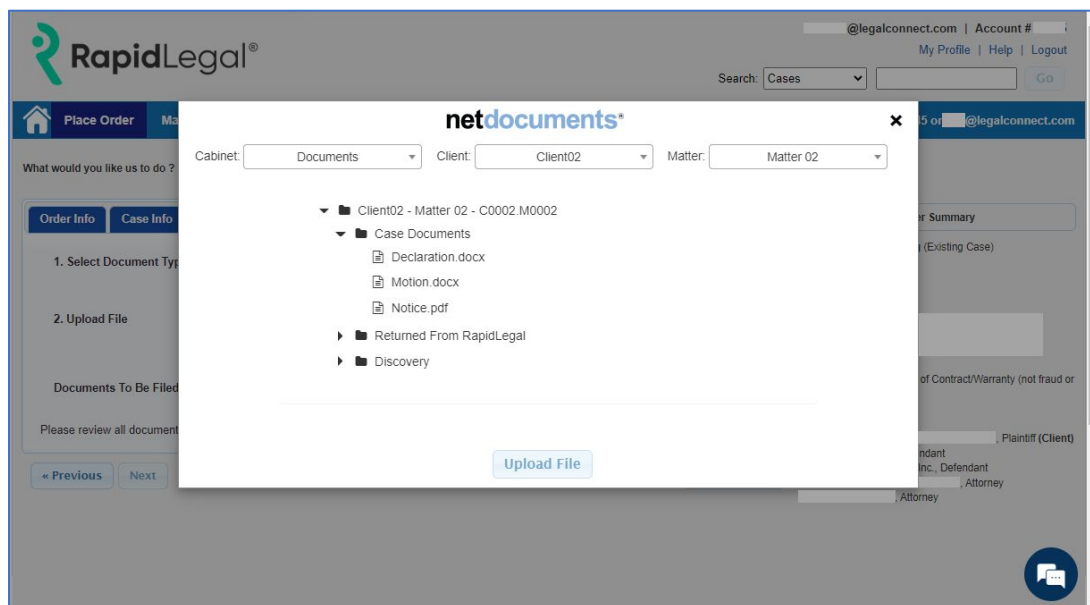
6. After selecting a file and clicking the "Upload File" button, the document is pulled directly from NetDocuments into Rapid Legal, added to your order, and appears in the "Documents To Be Filed" section. **PLEASE NOTE:** All document PDFs must conform to court rules for submission. A password-protected, or fillable pdf document will cause an error message to be displayed.
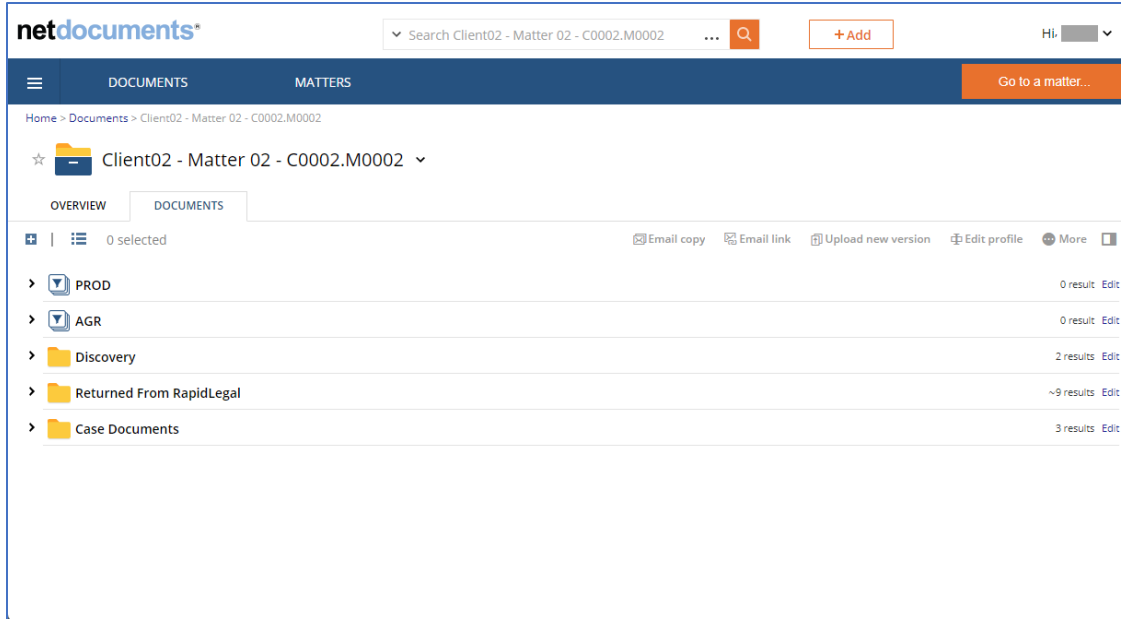


## Viewing Documents Returned from the Court

Court-returned documents will be viewable in the "Deliverables" tab of your Rapid Legal order. You will receive an email from Rapid 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. To access, log into your NetDocuments account and navigate to the Client and Matter you selected when submitting the eFiling order in Rapid Legal. Locate the folder named "Returned from *Rapid Legal*," whose portal you used to submit the eFiling order.
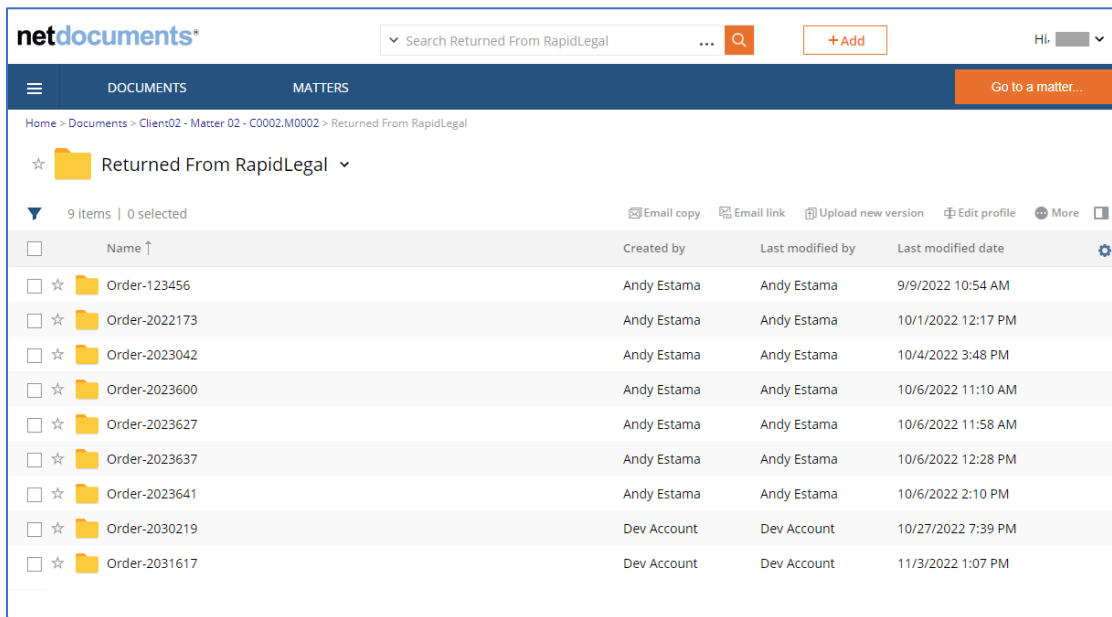
2. In the "Returned from *Rapid Legal*" folder, you will see a list of all Rapid Legal orders submitted under this Client and Matter. Locate the proper folder by matching the Order Number assigned when the eFiling order was submitted in Rapid Legal.



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 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 Rapid 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 Rapid 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 Rapid Legal in an eFiling order?**

a. Yes. Multiple documents can be loaded into Rapid Legal 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 Rapid Legal convert my Microsoft Word files to PDF?**
   a. All document types currently supported by Rapid 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 Rapid Legal before being submitted to the court.