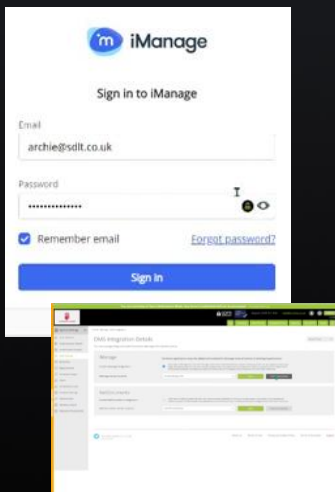**FormEvo** — Evolutionary Legal Forms

FormEvo

NetDocs

iManage

Seamless integration with iManage & NetDocuments

The integration will allow users to 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 OAuth 2.0 flow used by server-hosted integrations to obtain an access token. This means the benefits of using FormEvo cloud-based legal forms along with iManage or NetDocuments are:

Protected User Information

No concerns around which staff, have access to what, as this information barrier concept is directly reflected from DMS into FormEvo

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"

Two types of DMS Record

The integration delivers 2 types of "DMS record". A single source of truth clickable URL; to either a DRAFT or a finalised form and a snapshot at a moment in time of the draft as it builds in content terms.
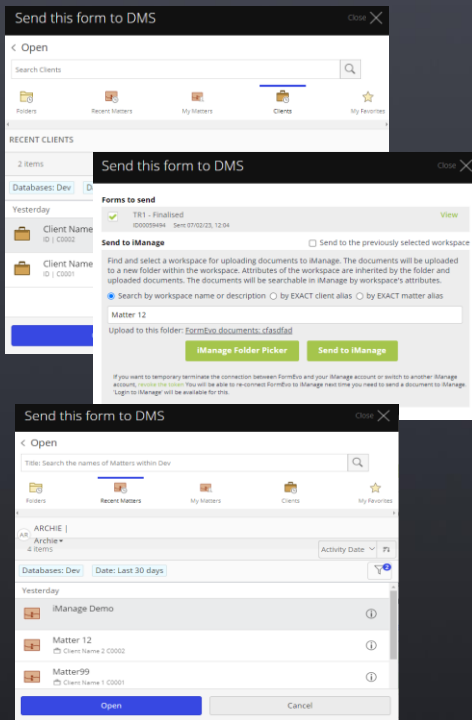
Snapshot PDF

A snapshot PDF is a totally open source, always available irrespective of its generating source, a long-life milk version of a PDF. There is "no lock-in of your firm" to maintain a current FormEvo account in order to use the PDF within DMS. Once a form is finalised, we then save a link/PDF of the completed form

Version control

Version control is visualised in the naming convention used by the PDF and/or URL which makes reviewing by file name easily consumable by any user and captures multiple versions of a form and, track all amendments made.

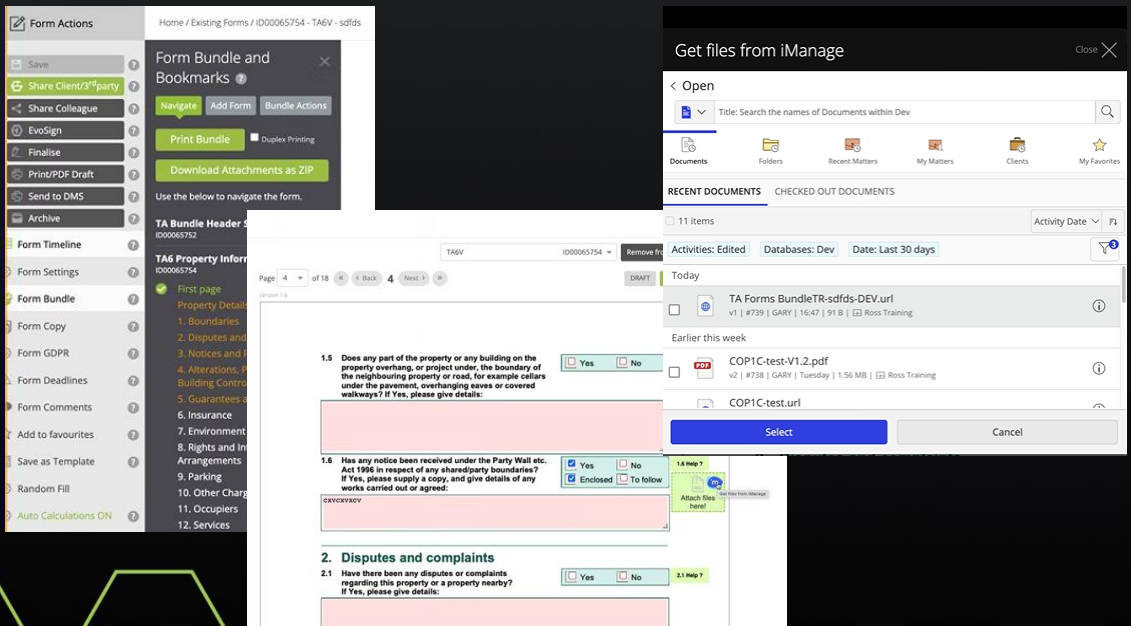Users can access draft and finalised forms from their DMS using the folder picker

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.

"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."

Additional / New features making your life easier -

Legal Tech Buyers Guide Supplier of the Year 2023