

Using NetDocuments with Direct Legal Support

If your firm uses NetDocuments, you can connect it to the Direct Legal Support portal when you place an eFiling order. Pick your documents straight from NetDocuments instead of downloading and uploading them. When the court returns your filing, the documents are saved to the right client and matter in NetDocuments.

Start here

LOG IN TO THE PORTAL →

Or go to directlegal.legalconnect.com and log in. The NetDocuments option is on the **Documents** tab of an eFiling order. New to eFiling? See our eFiling guides for new and existing cases.

What you will need

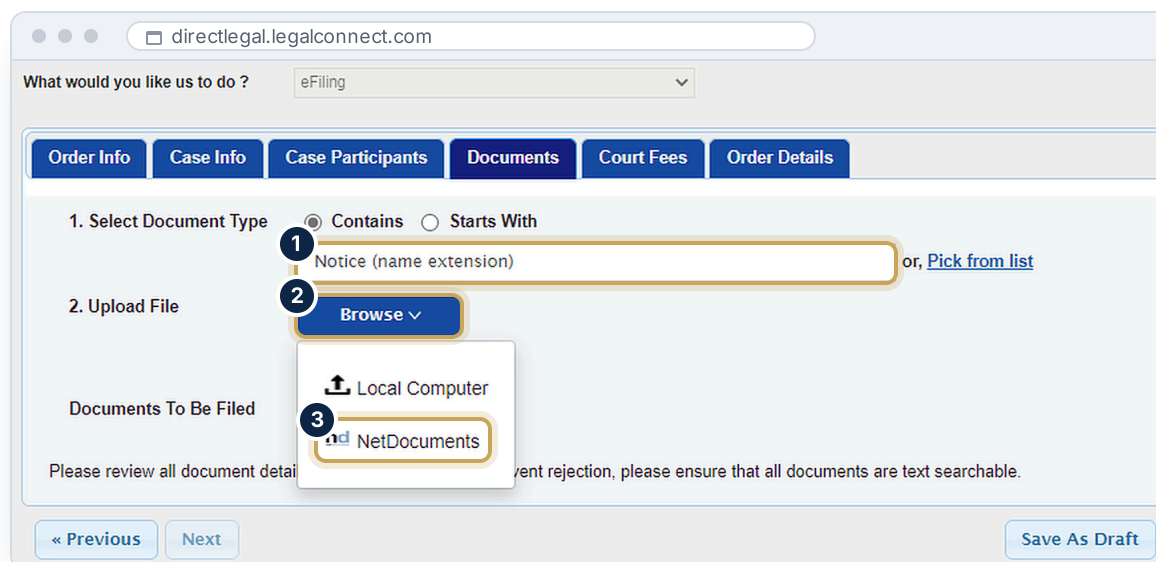
- ✓ A NetDocuments account, and its email address and password
- ✓ Your documents saved in NetDocuments under the right client and matter
- ✓ An eFiling order started in the portal

Connect NetDocuments to your eFiling order

1

Choose NetDocuments on the Documents tab

Start an eFiling order and go to the **Documents** tab. Choose the document type under **Select Document Type**, then click **Browse** and choose **NetDocuments**.



directlegal.legalconnect.com

What would you like us to do ? eFiling

Order Info **Case Info** **Case Participants** **Documents** **Court Fees** **Order Details**

1. Select Document Type ☒ Contains ☐ Starts With

1 Notice (name extension) or, [Pick from list](#)

2. Upload File

2 Browse ▾

Documents To Be Filed

3 Local Computer

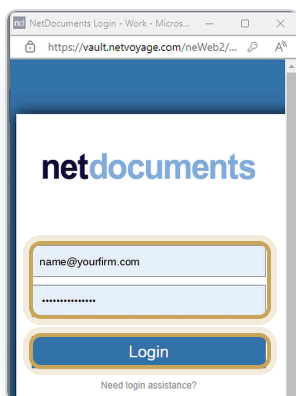
NetDocuments

Please review all document details before filing. To prevent rejection, please ensure that all documents are text searchable.

<< Previous Next Save As Draft

2

Sign in to NetDocuments

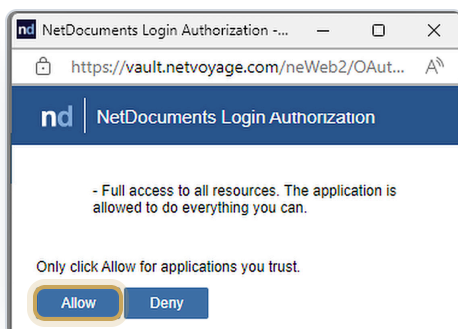


A NetDocuments window opens. Enter the email address and password for your NetDocuments account and click **Login**.

Which login? Use your NetDocuments email and password. They don't need to match your Direct Legal login. If your NetDocuments login is valid, the connection is made.

3

Allow the connection



NetDocuments asks you to allow the connection to your NetDocuments account. Click **Allow**.

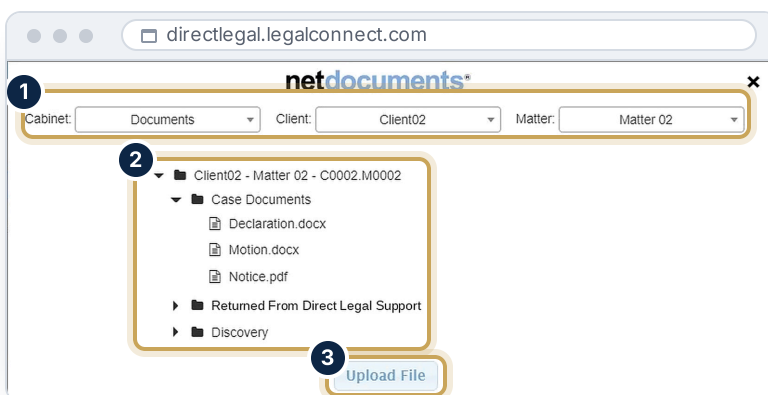
The window closes and you return to your order, where the NetDocuments file window opens.

Add documents from NetDocuments

4

Choose your document

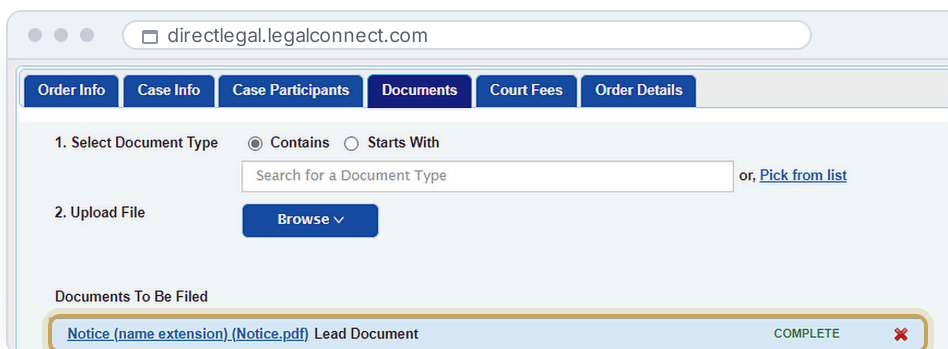
Use the lists at the top of the NetDocuments window to choose the **Cabinet**, **Client** and **Matter**. The matter's folders and files appear below. Open the folders, select your file and click **Upload File**.



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Check the document in your order

The document is pulled from NetDocuments into your order and appears under **Documents To Be Filed**. Fill in the details below it. Fields marked with an asterisk (*) are required, and the document shows **COMPLETE** when they are filled in.



To add more documents, repeat these steps for each one. Then your eFiling order continues as usual.

Before you submit: Your documents must follow the court's rules. A password-protected or fillable PDF causes an error. To prevent rejection, make sure every document is text searchable.

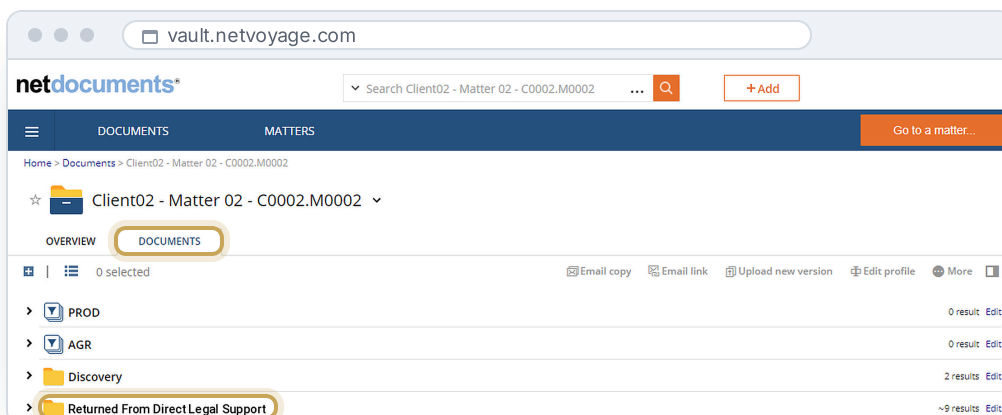
Find the court's returned documents in NetDocuments

When the court clerk processes your eFiling, you get an email saying whether it was Accepted, Rejected or Partially Accepted, with links to the documents. The documents are also on the order's **Deliverables** tab, and they are saved in NetDocuments automatically, under the client and matter you chose.

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Open the matter in NetDocuments

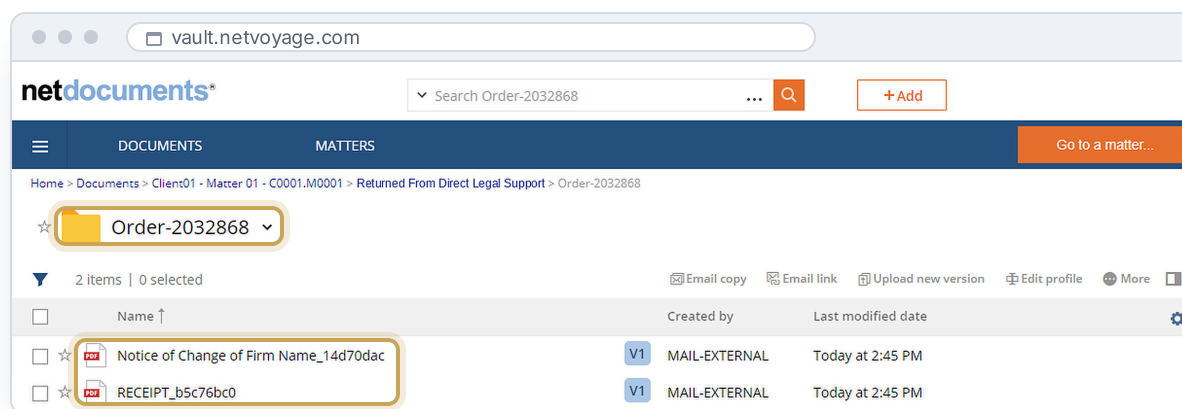
In NetDocuments, open the client and matter you chose for the order. On the **Documents** tab, open the folder named **Returned From** followed by our company name, Direct Legal Support.



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Open the folder for your order

The **Returned From** folder holds one folder for each eFiling order sent under this client and matter. Each one is named **Order-** followed by the order number. Open the one that matches the order number you got when you placed the order. Inside are the documents returned from the court, such as conformed copies, receipts and notices.



Staying connected

How long NetDocuments stays connected to the portal depends mostly on NetDocuments. If you place another eFiling order soon after the first, you probably won't need to sign in again. After a longer break, NetDocuments may ask you to sign in and allow the connection again. If your browser saves your NetDocuments login, it fills in for you.

Good to know

NetDocuments works with eFiling orders. The NetDocuments option appears when you upload documents to an eFiling order, and only customers with a NetDocuments account can connect.

File types. You can upload the same kinds of files from NetDocuments as from your computer, such as PDF, Word and Rich Text files. Files that aren't PDFs are converted to PDF before they go to the court.

Use Clio? See our guide, Using Clio with Direct Legal Support.

Questions? We're here to help.

Call our Litigation Division Monday to Friday, 8:30 a.m. to 5:00 p.m. Pacific, or email info@directlegal.com. Ready to order? [Log in to the portal](#).

(800) 675-5376