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6 BENEFITS OF INTEGRATING
Document Management with your
Practice Management System

Practice management (PM) software is a valuable tool for law firms. When you add the power of document management to the mix, everything fee earners need for working on a matter is right at their fingertips.

A PM system provides an important foundation for managing the practice, including organising administrative tasks, streamlining processes and workflows and simplifying invoicing and billing. But where do your fee earners spend the majority of their day? In documents — making an intelligent document management system (DMS) like NetDocuments the perfect companion tool to your PM software.

The Best Technology Supports Your Best Work
Here are six key advantages your firm can enjoy when you integrate a PM system and DMS.

1. **One confirmed source of truth.** If your documents are scattered and there are multiple places you have to go to understand what is happening on a matter, you are wasting time and introducing a level of risk that is unnecessary.

   When your DMS is the single source of truth for all matter-related documents and emails — and chats within Microsoft Teams — your DMS becomes the one place you go to find and collaborate on exactly what you need. Have confidence that you're always working on the correct version in the most secure way.

2. **Easy access to everything you need.** Digital files in your PM system take the place of paper files in so many ways — contact information, identifying the roles people play on a matter, calendar information, matter-specific information, time and billing records and so much more.

> We've got one version of the truth now. Our practice management solution and document management solution are completely integrated, so you're always talking on the same base of data with everyone. And it's version-controlled with the right security and access.
>
> — John Turner, Chief Operating Officer,
> *Ellisons Solicitors*

When you integrate your PM and DMS, documents and emails related to a matter are organised, easy to find and secure. With NetDocuments, the native-cloud platform allows people to work where they want — whether in email, documents or web browsers. It's all connected in your once source of truth.

3. **Create documents faster.** Document templates make it possible to skip the re-work of document formatting or remembering where you saved a recent version. This increases productivity. When combined, practice management and document management software make it easy to leverage these templates to your advantage. For example, you can set up templates to automatically pull matter information in, ensuring documents are created even more quickly, before saving final files in NetDocuments. (Remember, this all happens seamlessly, without having to jump from system to system.)

4. **Find exactly what you need quickly.** How much time is wasted searching for the right document or email? With NetDocuments search, you can use wildcards, AND/OR/NOT operators, criteria such as "within five words" and quotes to find exactly what you are looking for in your document repository. And you can filter your searches by date, document type, client/matter and author and then flag files as Favorites and see your recently used documents.

5. **Log time with a single click.** When you integrate practice management and document management systems, logging time can be as easy as clicking a button. For example, documents stored in NetDocuments can be listed directly within your PM system — and a time entry for the work spent drafting, finalizing or reviewing a document is one click away. This can help ensure your timekeepers can efficiently log their hours to the matter.

6. **Unlock the power of automation and AI.** Law firms are discovering the strategic differentiators that come with leveraging AI, but it's critical to invest in the right tools. With the NetDocuments intelligent DMS, automation and AI are built in, so legal teams can ask conversational questions of their documents and get instant answers, run pre-built AI apps for common tasks like reviewing contracts, and customize AI apps for a firm's unique workflows.

Better Together

Leveraging technology to think differently about how work gets done comes with many rewards, and leaders in legal are realizing how document management can help level-up their legal practice. Together, the benefits of a PM system with an intelligent DMS platform like NetDocuments gives people the tools they need to do their best work and provide clients with secure, high-quality work product.

Ready to see what combining the power of a PM and DMS can do for your firm? Book a demo at **netdocuments.com/demo**.

NetDocuments is trusted by 7,000+ legal teams around the world for intelligent document management with seamless AI and automation, powerful workflows with deep Microsoft 365 integrations (including Copilot) and a user-friendly experience.