

## CONTRACT EXPRESS

### How to

# Export Documents to NetDocuments

#### Overview

With Contract Express, you can export generated documents to NetDocuments as part of your drafting workflow.

The guide outlines the steps to export documents, including selecting the export location and defining document properties, and how to work with documents after export.



Your Contract Express Administrator must configure the connection to NetDocuments before you can export documents to it.

#### 1. Create a Document in Contract Express

To create a document, navigate to the **Documents** tab and click the **New Document** button.

Select your desired Template and answer all questions in the questionnaire.

**Note:** Documents can only be exported when they have a status of *Ready* or *Executed*. However, your Contract Express Administrator may have configured your site to permit this action for other statuses.



Documents will have a Ready status when the questionnaire is considered complete. This means all questions have been answered and there are no pending approvals.

Documents will have an Executed status after successful completion of the electronic signature process or after the document owner has uploaded a signed copy of the contract and manually marked it as executed.

#### 2. Export to NetDocuments

You must have Write or Full sharing permissions to export documents to NetDocuments.

##### Export a single Contract Express Document

The steps below outline how to export files to the same NetDocuments folder(s).

##### Choose the export location

- From the **Documents** tab, navigate to the Document you wish to export.
- Click on **Export Documents** at bottom right of page.



The first time you click *Export Documents*, you will be taken to the NetDocuments login page where you must enter valid credentials and allow the connection to Contract Express.

You will not be prompted for credentials again, unless you revoke the NetDocuments token on your *My Account* page.

- Select the files to be exported to the same folder.
- Click the **Select Location** button.
- Select the NetDocuments cabinet and destination folder(s).
- Click the **Save** button.
- To export the files to additional workspaces repeat steps 3-6.



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## Review the document properties

Document properties are the metadata parameters of documents that are stored in NetDocuments.

1. Click on **Manage properties**.
2. Review and amend the properties, if desired.
3. Click the **Save** button.

## Initiate export



Ensure you have selected export locations for all files that you need to export. The Export action can be performed only once.

Once all the files you need to export are listed in the Export files section, click the **Export** button.

Export files			EXPORT
Name	Properties	Location	
NDA for Jane Doe	Default	> 1 folder	:

After export, the files will be available in NetDocuments in the folder(s) selected during export.

The screenshot shows the 'netdocuments' interface. At the top, there's a search bar labeled 'Search Folder10'. Below it, a blue header bar says 'DOCUMENTS'. Underneath, a breadcrumb navigation shows 'Home > Documents > Cabinet Inbox > Folder10'. The main area displays a list of items: 'Folder10' (with a star icon), '6 items | 0 selected', and two specific documents: 'NDA for Jane Doe' and 'NDA for Mickey Mouse'.

## Export multiple Contract Express Documents

The steps for exporting multiple Documents are similar to those for exporting a single Document.

1. From the **Documents** tab, select the checkboxes for the Documents you wish to export.
2. Click the **Export Documents** button.

My documents	All documents	Shared documents
<input type="button" value="DELETE"/>	<input type="button" value="MOVE"/>	<input type="button" value="DOWNLOAD AS ZIP"/>
<input type="button" value="EXPORT DOCUMENTS"/>		
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Name		Status ▾
<input checked="" type="checkbox"/> <input type="checkbox"/> NDA for Jane Doe		● Executed
<input checked="" type="checkbox"/> <input type="checkbox"/> NDA for Mickey Mouse		● Executed

The files for each Document are grouped together on the export page.

The screenshot shows a list of documents for export. It includes 'NDA for Jane Doe' (status: Executed) and 'Assembled contract.jpg'. Below these, there's a section for 'NDA for Mickey Mouse' which is checked. A 'SELECT LOCATION' button is at the top right.

Continue with the steps for exporting a single Document to select the export locations, review document properties and initiate export.

## 3. Work with exported Documents in Contract Express

Once a Document has been exported to NetDocuments, it is stored in Contract Express with a status of *Exported* and can no longer be edited.



Exported Documents can be cloned to create a new Document with the same questionnaire answers.

You can then update the questionnaire answers as needed and export the cloned Document to NetDocuments.

## Deletion of Documents after export

Your Contract Express Administrator may have configured automatic deletion of Documents after export. If this configured, you will see the following message when preparing Documents for export:

*Your Document(s) will be deleted from Contract Express after export. If you want to keep your Documents after export, cancel the export process and contact your Contract Express Administrator.*

## View the export location of Documents

The export location is saved to the Document record in Contract Express during the export process.

To view the export location, go to the Document page and click on **View Folder(s)**, bottom right of page.

The screenshot shows a 'Exported documents' section. It lists 'NDA for Jane Doe' and provides the export details: 'exported to: Documents/Cabinet Inbox/Folder10 12:11:51'.