

Your job is to make things happen. You live and work to close deals, lead successful meetings, negotiate more business and strive for efficiency. Take control of the paper chase by fitting together, like a hand and glove, your CRM with a document management to securely organize, manage, share and access your document work, anytime, anywhere.



SaaS-based Document Management

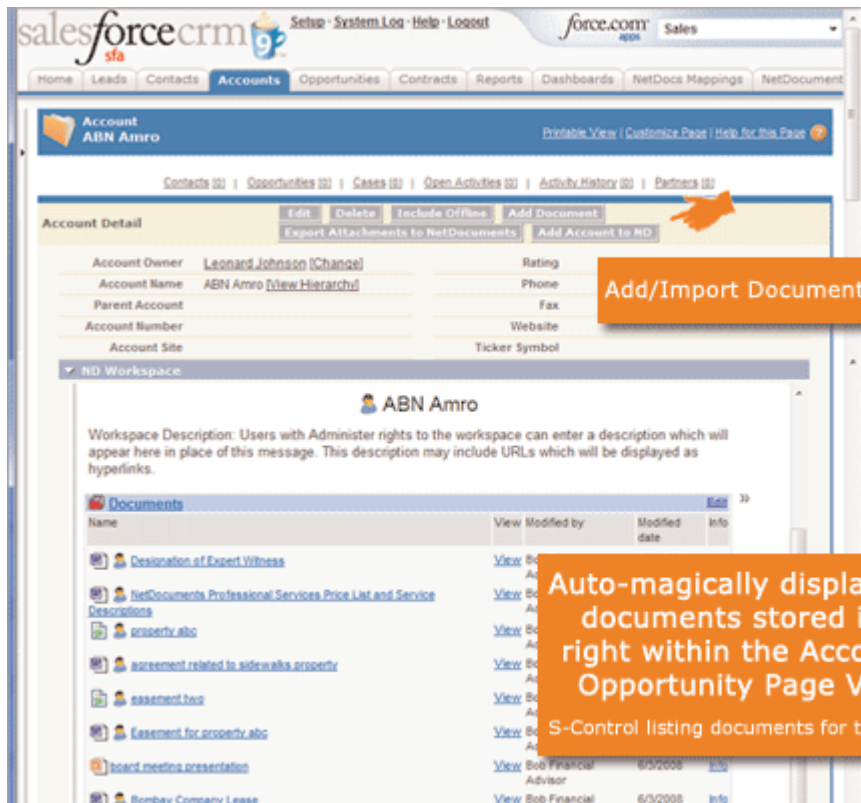
NetDocuments, a Web-hosted, Software-as-a-Service document, email and records management service, offers a feature-rich, easy-to-use, and customizable environment to fit the way you want to integrate and do your document work within Salesforce.

- > Store all types of documents and emails eliminating the high costs and limited storage space associated with Salesforce.
- > Powerful full-text searching helping you find what you need fast when you have that *client on the line* as well as the ability to search the content of documents across your entire document library.
- > Display and work with documents and emails directly within your Account, Contact, or Opportunity pages.

MOST ADVANCED APPEXCHANGE FUNCTIONALITY FOR DOCUMENT MANAGEMENT

NetDocuments has developed a sophisticated feature set that is easy to install and setup as an AppExchange package for what ever Salesforce Edition you may have. But you're not limited to what we've done. You may customize, integrate and design your setup of NetDocuments in many other ways. Our Customer Service team will assist you in designing the best fit for your business needs.

With two fully-featured SaaS applications fitted together like a hand and glove, you will unite with hundreds of other joint customers who are benefiting from a best-of-breed document management service that delivers compliance, security, powerful searching, client collaboration, document backup, retention policies, and universal access--all within Salesforce.



Add/Import Document Buttons

Auto-magically display your documents stored in ND right within the Account or Opportunity Page Views.

S-Control listing documents for this Account

USER FEATURES

Common login - NetDocuments works from within Salesforce without requiring the user to login to a separate application.

Account, Contact, Opportunity - Open, create, manage and edit any documents stored in NetDocuments and accessible from within your Salesforce Account, Contact or Opportunity detail pages.

Add Document Button - A set of Add Document buttons can be displayed on pages to initiate the creation of a new document, import existing documents from your PC, or establish a reference to a paper document, all filed in NetDocuments with corresponding attributes from Salesforce applied.

Anytime, Anywhere Document Management - Access your entire NetDocuments account and all documents by logging directly to NetDocuments anywhere, anytime. NetDocuments is a feature-rich Software-as-a-Service (SaaS) just like Salesforce.

Collaboration - Client-centric Portals - With NetDocuments you can securely extend NetDocuments Workspaces to your clients and external people—all included in the service and easy to create and manage.

ADMINISTRATIVE FEATURES

Field Mappings - To optimize the integration between Salesforce and NetDocuments by establishing the relationship of a NetDocuments attribute field with the Salesforce Account or Opportunity Name, ID or Number field. An *Add Account to ND* (NetDocuments) can be added for users, with admin rights, to simply update NetDocuments with the newly created Salesforce Account enabling the corresponding document list being dynamically created and activated within the newly created Account page.

S-Controls - Display a NetDocuments search result within the corresponding Salesforce pages (Account, Contact or Opportunity). This display may be a list of documents, list of emails, a NetDocuments folder tree or a NetDocuments Workspace.

Custom Links - Optionally add a custom link to open a new browser window or within Salesforce to view folders, workspaces or sets of documents related to the corresponding Salesforce page.

Search links - Customized saved searches can be created and linked within Salesforce automating queries within NetDocuments. A Search link on the Salesforce side bar can be added to open a NetDocuments Search window to perform powerful document content searches across all Accounts or Opportunities.

Export Attachments Button - Move notes, attachments, and emails from Salesforce to NetDocuments. They can be added to the Account, Case or Opportunity Details page. NetDocuments Profile values can be automatically passed from Salesforce to NetDocuments when documents are added to NetDocuments using the Export Attachments button or the Add Document button.

Customization - NetDocuments and Salesforce both support standard web services or SOAP-based API's for integrating and customizing the integrations beyond the standard AppExchange packaged feature set. Contact our Customer Service to explore ideas as to further integrations for your specific business.

SaaS benefits - NetDocuments, a Software-as-a-Service application, provides all the benefits of automatic updates, business continuity built-in, secured storage, backup and management in the Cloud. NetDocuments compliments all the underlying SaaS benefits of Salesforce for document and email management.

SERVICE REQUIREMENTS

Browser - NetDocuments supports Internet Explorer (IE) 6 or higher. Any other browsers or operating system other than Windows, NetDocuments will direct the user to its ND2 interface with limited functionality supporting all other Internet-connected devices. To benefit from the full list of features described above, IE is strongly recommended.

Salesforce Editions - NetDocuments supports any Salesforce Edition, e.g., Enterprise, Professional, Basic, that supports the install of an AppExchange package.

ADD, OPEN, EDIT, EMAIL, PRINT AND MUCH MORE

