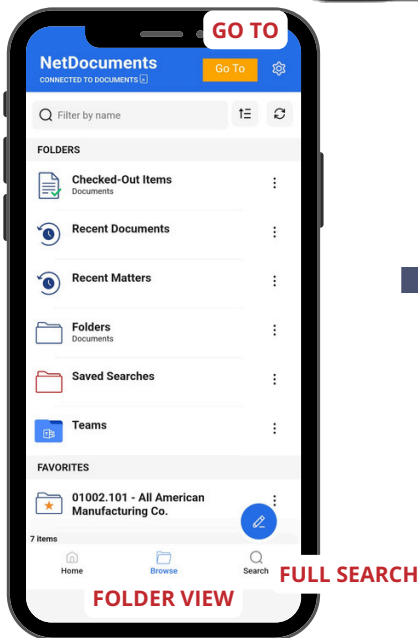
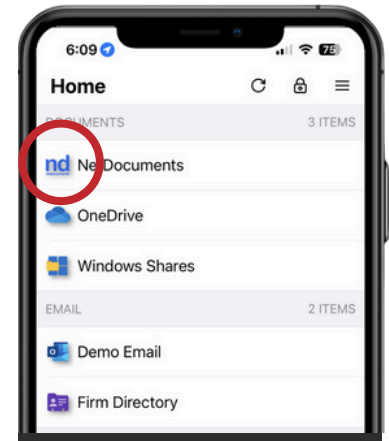
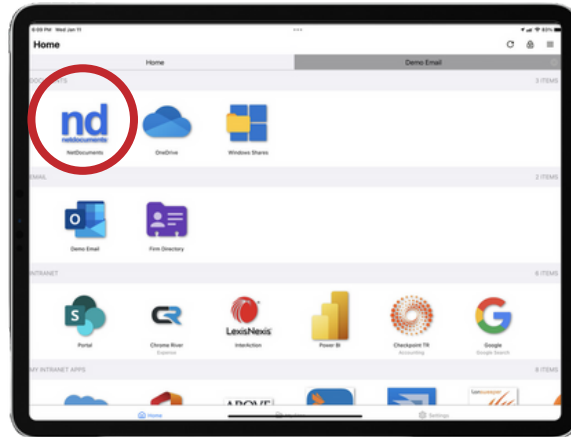


# LINK App Quick Start Guide

Workflows with NetDocuments and Email

## Access NetDocuments DMS

Tap the  
NetDocuments  
Tile

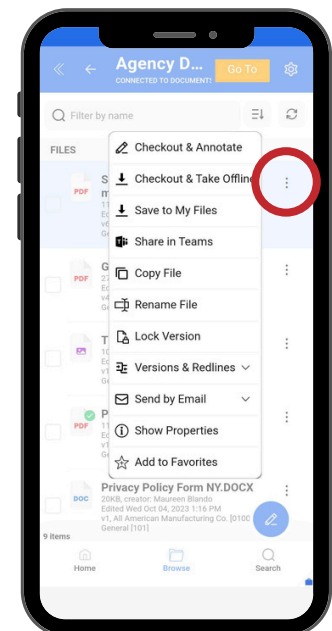


## Navigate & Search DMS

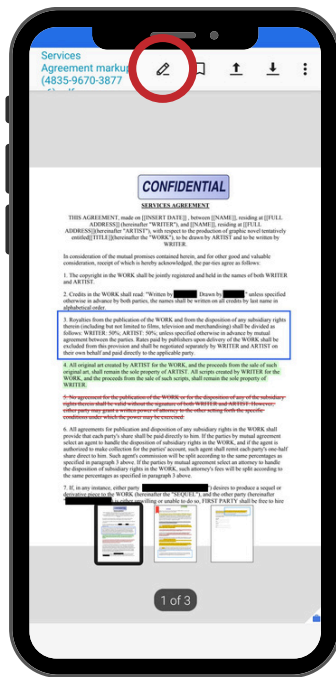
- Tap folders to navigate
- Go To:
  - Search for Client
  - Workspace or Doc ID
- Full Search:
  - Search Glass icon

Tap Ellipsis for File Action Menu,  
including:

- Checkout & Edit
- Accept Redlines & View Clean
- Save to My Files in LINK
- Versions & Redlines: Compare Versions
- Send by Email: Email Copy, Link, or PDF
- Show Properties



## Annotate



Learn More: [Watch a Video on Annotation](#)

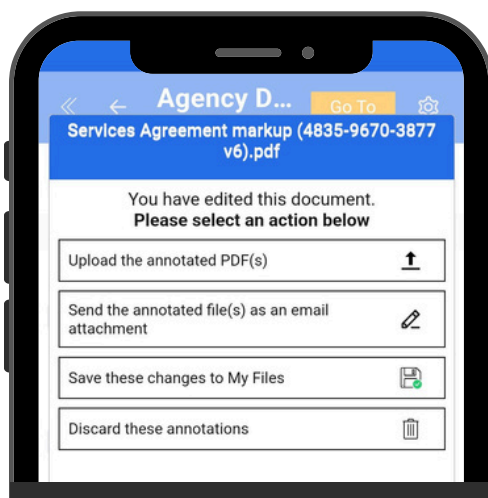
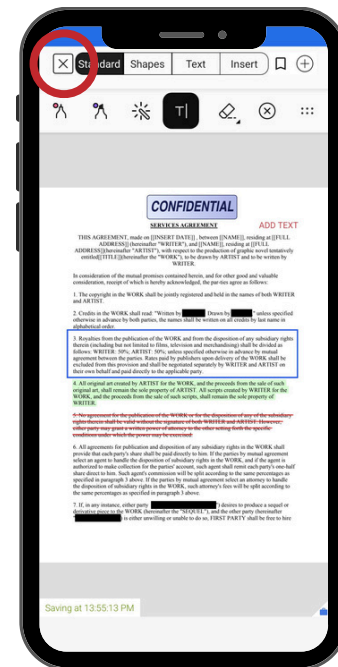
## From an Open File, Tap Pencil Icon

- For a PDF, Annotation menu will appear as below
- For a Word file, select Edit or Annotate

*Note: Editing is not enabled at all firms.*

## Annotate the File

- Use the Annotation menu to highlight, underline, add text, write free-hand, sign, and more
- After annotations are complete, tap the "X" in the upper left to display the action menu below.



## Annotation Action Menu

Select:

1. Upload to NetDocuments (check-in)
2. Send as email attachment
3. Save to My Files in LINK
4. Discard annotations

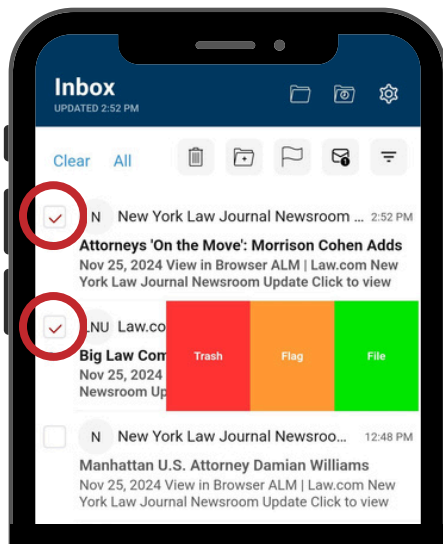
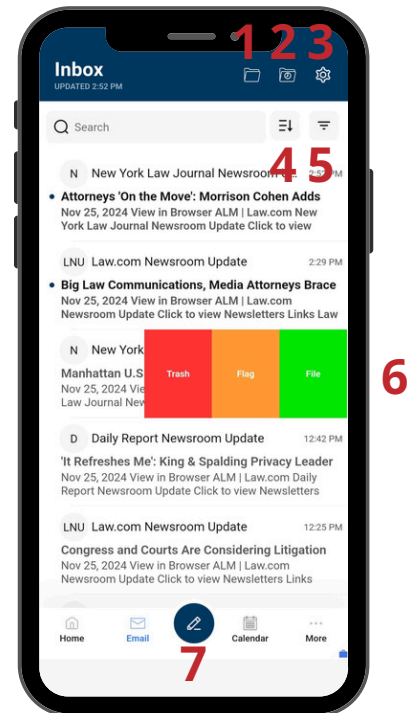
## Email

### Inbox Actions

1. Go to Outlook folders
2. Filing History
3. Settings (gear): Set Swipe Menus, Inbox Preview, Font Size, more
4. Sort
5. Filter
6. Swipe Menus: Configure in Settings (gear)
7. Compose Email: Pencil



**Learn More: Read a Quick Tip on Email Settings**



### Multi-Select: File, Flag, Delete

- Tap multiple “radio buttons”
- Swipe, then tap File or other
- Set swipe options in Settings (gear)



**Learn More: Watch a Video on Filing Email**

### Compose Email & Send

1. Paperclip: Attach files or photos
2. Mark Urgent
3. Turn on Send-and-File
4. Tap Paper Airplane to Send



**Learn More: Watch a Video on Composing an Email**

