



PatternBuilder™

# Your expertise amplified.

Take your repetitive legal processes and document creation tasks — and **automate them.**

## Generate complex documents with the click of a button.

You've spent years developing your expert content. Why not use it to provide documents to clients **faster**, with **greater accuracy**, while doing **less repetitive work**?

**PatternBuilder** from NetDocuments empowers legal professionals to replicate and automate their unique templates and processes, so they're done the right way — your way — every time.

Using your expertise, forms, data, and built-in logic rules the no-code PatternBuilder tool makes it **easy to create and update automations** without the help of software developers or IT professionals.

Enable enterprise-grade automation with the ability to automatically run background processes, **extract and store data in built-in databases**, and send emails, which are needed to support complex workflows and status reporting.

## With PatternBuilder, you can:



### Embed Document Assembly Directly into Your DMS

Go beyond “find and replace” with custom automations that populate user inputs into your Word and PDF documents straight from intake and automatically save those documents in the folder or workspace of your choosing with consistent naming — all in a matter of seconds. With PatternBuilder, input data can also be stored in data tables for reuse with multiple apps over time and across multiple matters, if needed.



### Support Complex Logic and Rules

With its robust tools, PatternBuilder can automate your practice area's most unique rules and bespoke complex logic needs, automatically replacing entire sections or documents on the fly based on inputs or groups of entries. Looping allows as many entries as needed to gather all the data at one time, so nothing gets missed.



### Create Customized, Error-Free Documents at Scale

Smooth out multipart processes like approvals and reviews with automatic background processes using bulk data and leveraging built-in data extraction tools and data tables for data storage and reuse. You can even upload or download data via CSV files. In PatternBuilder, you've got all the tools to do enterprise-grade document generation, including automated status updates via email to keep work flowing.



### Innovate While Remaining Compliant

Where many automation solutions don't measure up to the security and compliance requirements of law firms, highly regulated industries, and the public sector, PatternBuilder comes with NetDocuments' sophisticated multilayer security and compliance certifications that thousands of similar organizations already trust with their most important data.

## Interested in adding AI? Accomplish even more with PatternBuilder MAX.



# PatternBuilder MAX™

## Automation + AI is your new superpower.







Go beyond chatbots with AI-powered features that enable full end-to-end workflows.

### AUTOMATE COMMON LEGAL TASKS WITH GENERATIVE AI

**PatternBuilder MAX** takes automation to new levels with advanced generative AI capabilities to build perfectly customized, reusable generative AI prompts containing variables and matter information. Leverage your documents to ground prompts, **improve results, and eliminate hallucinations.**

And **your confidential information stays safe**, because PatternBuilder MAX inherits your firm's security, compliance, and best practices — and integrates seamlessly with the NetDocuments workflows and productivity tools that organizations rely on every day. This is more than just a chatbot!

### With the addition of PatternBuilder MAX, you can:

-  Generate branded and formatted draft documents based on internal precedents and playbooks
-  Instantly summarize documents like depositions and automatically save the summary to the correct workspace
-  Extract information from documents and save extracted data to a built-in database
-  Quickly build out customized scripts for questioning witnesses in depositions or at trial
-  Compare third-party contracts against your firm's clauses and best practices for inconsistencies and omissions
-  Ask plain-language questions about the information in your documents and get back clear answers

### INCLUDES STUDIO APPS

PatternBuilder MAX includes our growing suite of Studio Apps that you can **begin using immediately**. Additionally, the PatternBuilder framework enables customization of these apps to build bespoke apps with your full workflows around them. **Based on common legal use cases**, some of the Studio Apps included with PatternBuilder MAX help with drafting, summarizing, translations, contract playbooks, timelines, and so much more!

**Want to see PatternBuilder in action?**

**REQUEST A DEMO**

NetDocuments is the world's #1 trusted cloud-based content management and productivity platform that helps legal professionals do their best work. Backed by 25 years of experience in cloud innovation, NetDocuments offers a complete end-to-end platform for document and email organization and management, including award-winning automation and AI capabilities; robust security, collaboration, and search technologies; seamless integrations with other tools professionals use daily; and a suite of large language model AI-powered solutions with the security and guardrails to manage AI responsibly. NetDocuments supports over 7,000+ law firms, corporate legal departments, and public sector entities globally. Learn more at [netdocuments.com](https://netdocuments.com) or call us at (866) 638-3627.