



The original All-in-One®  
Software Suite for  
Case and Financial Management

Front Office Product Sheet 



## webDMS

### Product Features

- Merge forms and Document Assembly
- Works with Adobe® Acrobat®, Microsoft® Word®, Excel®, and WordPerfect®
- Sent emails are automatically saved in the DMS
- Advanced full text and metadata searches
- Versioning and red-lining
- Creates and respects Active Directory security permissions even during import/export operations
- Mass Drag and Drop import via the Windows® multi-file select gesture
- Access documents from anywhere with full featured browser based mobile access
- Works Offline without internet connectivity
- Automatically captures billable time
- Restructure shared and personal folder directories via Drag and Drop gestures, just like Windows
- Preview any document instantly in the Cloud before downloading regardless of format

webDMS is totally new; it was designed and programmed from the ground up for fast mobile and cloud performance using the latest Microsoft® browser technologies.

webDMS is an outgrowth of PerfectLaw's Attorney Information Manager, AIM®. It incorporates all the creation, search, and retrieval features AIM® users are accustomed too, along with seamless integration with Microsoft® Office365®.

webDMS' unique architecture addresses many security, performance, and integration issues affecting law firms. Perhaps the most important are

- Security issues such as Ransomware,
- Performance issues when working remotely,
- Clumsiness coupled with a steep learning curve,
- Poor integration with Windows®, Office® and PDFs, especially with respect to security and Drag and Drop functionality,
- Limited searching capability,
- Shaky vendor syndrome where the vendor has been sold recently or goes out of business and the product goes on life support.

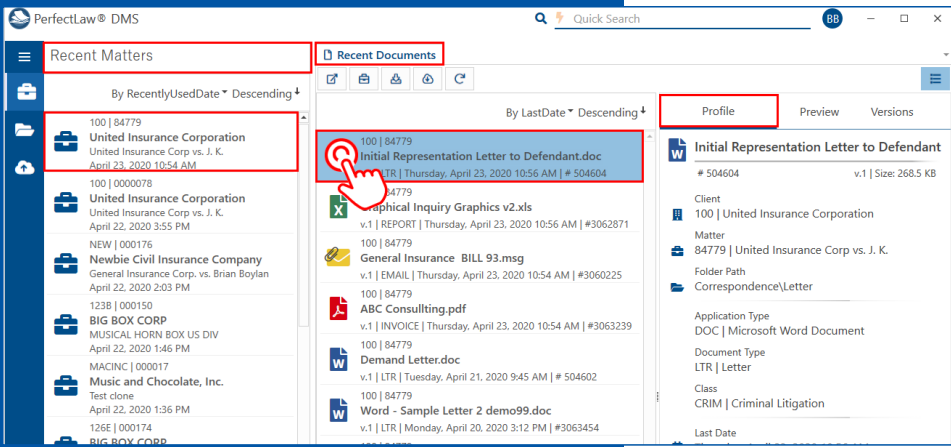
With webDMS, users will enjoy collaborating with one another, creating documents, profiles, versions using drag and drop gestures to move, copy and link documents into custom folders. Working with webDMS is much like working with Microsoft® Windows®, helping attorneys transition to the cloud in little to no time at all.

### Benefits

- Avoid the latency associated with terminal server, Citrix® and VMware® via faster technology both inside and outside the firm's office
- Avoid security issues such as malware and ransomware
- Recover lost or deleted documents days after they went missing
- Promote Knowledge base collaboration through efficient document sharing
- Ensure business continuity and disaster recovery via Microsoft® Azure®
- Enhance security with high level encryption
- Increase efficiency; almost all document searches using metadata and full text take less than 1-2 seconds per million documents.

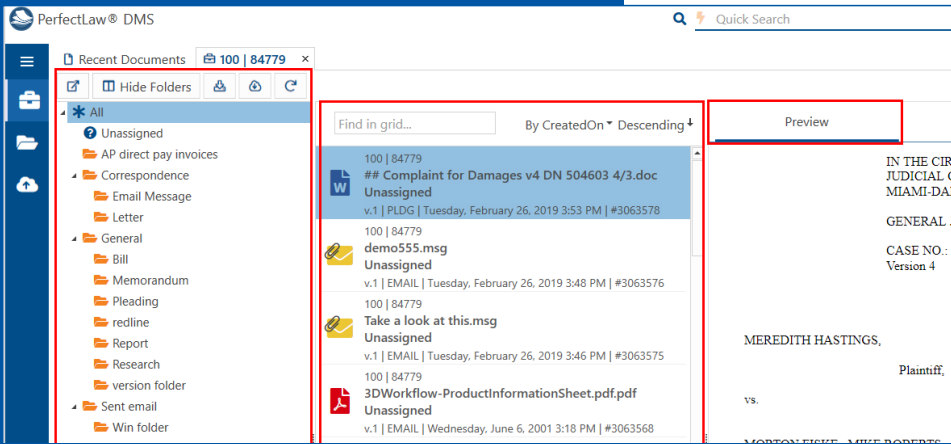
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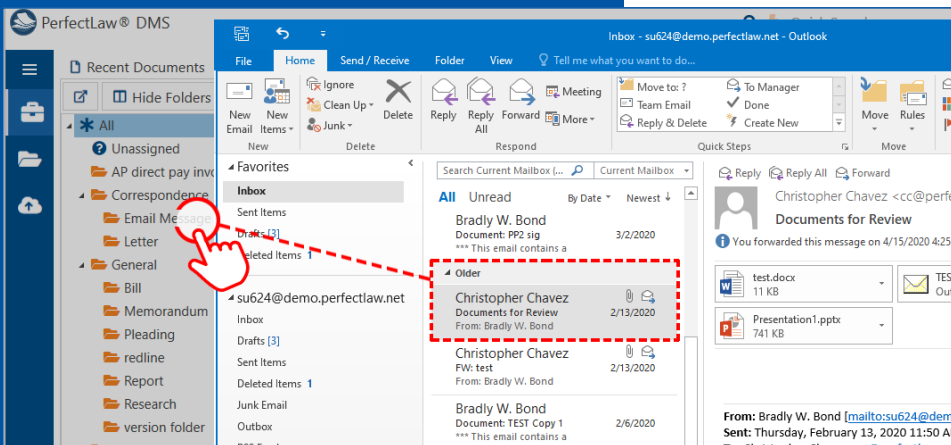
### Recent Matters & Documents View

Get a fast start each morning finding and opening recent documents or matters quickly. Using the first panel, the users can spot and open recent matters. Using the second panel, users can spot and open a recent document or email just as quickly.



### Matter Folders & Documents with Preview

Organize your matters using Matter Folders just like Windows® to find documents.



Importing emails is as easy as Drag and Drop. After users review their INBOX emails or their attachments they simply drag them to an appropriate matter folder as shown in panel 1 to save and profile. Panel 1 can be toggled to show either RECENT or Personal folders.

## Functions

- Saves and profiles documents in a sharable centralized database
- Automatically adds metadata to each document profile record including all names, dates, notes, keywords, location, document and version number, plus full text
- Compares and red-lines documents or versions
- Maintains audit trail history for all document creation, access, and update operations
- Syncs webDMS access permissions with Active Directory to enforce DMS integrated file security across all applications and users on the network
- Allows mass import or export of documents via drag-drop
- Perform move, copy, or link functions on one or more documents using the DMS or Windows® folders

## Synergy

- webDMS takes advantage of PerfectLaw's All-in-One® strategy to create synergies within its product line, to increase both production and efficiency
- Billable time and charges expended during DMS operations are recorded and appended to the billing file
- Bills and accounting reports are saved and secured automatically by webDMS, so they are always accessible
- webDMS saves and manages emails and documents created during the AIM document assembly process
- PerfectLaw's patented Paperless Workflow® software scans paper documents and converts them to popular formats such as DOC and PDF, so they can be integrated with webDMS

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