

AXDRAFT

An Onit Company

Metadata

Storage

Analytics

Features Inside **AXDRAFT**

OVERVIEW

One of the principal rules of management says:

”

Until we can manage time, we can manage nothing else.

At AXDRAFT, we know how much time goes down the drain due to a lack of efficiency. Let's say you need to copy and paste a bunch of data between your contracts, or find the document across 47 shared folders.

What seems like a 5-minute job and looks like nothing, adds up to hours by the end of the day. Hours spent on work that brings marginal value, and has little visibility.

By implementing productivity features, such as **Storage**, **Metadata**, and productivity tracking with AXDRAFT **Analytix**, that's one problem we are helping lawyers solve with our platform.

We won't say how much faster your workflows will get, and how much time you'll be saving a month or a year. You'll see it for yourself, right on the dashboard inside AXDRAFT.

Metadata

Contract metadata

Based on (i) variable clauses picked by the user/negotiated by a third party, (ii) data inputs typed in or auto-completed by the user through integrations, AXDRAFT can record metadata for your contract

The screenshot displays the AXDRAFT web application interface. On the left, there are four filter sections: 'Company name', 'Renewal terms', 'Company email', and 'Contract type'. Each section has a 'Contains' button (highlighted in blue), 'Doesn't contain', and 'Equals' options, followed by an 'Input value' text box. At the bottom of the filters is a '+ Add filter' button. The main area features a search bar with the placeholder 'Search for document or project...' and a magnifying glass icon. Below the search bar, it indicates 'Search result 10 of 31 documents'. A table lists the search results, each with a status, a date, an AXDRAFT logo, and a document title.

Status	Date	AXDRAFT	Document Title
Approving	27/01/2021	AXD	MSA
Approving	27/01/2021	AXD	Bylaws-test-01/20/2021
Approving	27/01/2021	AXD	Employee PIIA-test
Approving	27/08/2020	AXD	NDA
Approving	27/08/2020	AXD	NDA
Draft	15/07/2020	AXD	NDA
Approving	09/06/2020	AXD	AXDRAFT - Акт - ФОП

Add custom metadata

You can configure metadata separately for specific documents, or certain customers

Custom setup

The number and type of metadata fields are tailor-made for each customer

The screenshot displays the AXDRAFT web application interface. In the background, the 'Document storage' page is visible, featuring a search bar, filters, and a list of documents. A modal window is open in the foreground, titled 'Choose metadata you want to set:'. This modal contains a grid of metadata fields, each with a plus icon to add it and a minus icon to remove it. The fields include:

- Agreement date (selected)
- Company name
- Company type
- Company signatory
- Contract type
- Contract subject
- Term
- Automatic renewal
- Governing law
- Liability provisions
- Amount
- Expiration date (selected)
- Document type
- GST/HST number
- Currency
- Shipping terms (selected)
- Company address
- Company email
- Company phone
- Payment terms
- Prepared by
- Company code

At the bottom of the modal are two buttons: 'Set value' and 'Cancel'.

Assign **metadata**

AXDRAFT supports importing legacy contracts and labelling them with metadata upon request

Document storage

You can use **smart search to find** documents or **upload** an external document.

Storage View

Report View

Search

By name

In text

By tag

nda

×

Upload file

⬆

.pdf or .docx file

Search result 5 of 5 documents

Approving 27/08/2020	AXD NDA	⌵	⋮
Document info			
Renewal terms	One year	Add data + Edit data ✎	
Add new +			

CONDITIONAL approval flows

You can build custom approval chains triggered by certain metadata types (e.g. when the Governing law is set for California). When the condition is met, the flow will be automatically assigned to the document

The screenshot displays the AXDRAFT Approval Designer interface. On the left, a sidebar lists teams: Sales (2 users), Marketing (2 users), Development (3 users), Legal (2 users), and Mike's Team (2 users). A 'Create team' button is at the top of this list. The main area is titled 'Welcome to Approval Designer' and includes a 'Create new flow' button. Below this is a table of existing approval flows.

Title	Approval priority	Usage
Sales Approval	Parallel approval	1 documents use this flow
Approval Flow WITHOUT condition	Parallel approval	1 documents use this flow
Approval Flow WITH condition	Parallel approval	1 documents use this flow
Another approval flow WITH condition	Parallel approval	1 documents use this flow
MSA Approval	Parallel approval	1 documents use this flow

Auto-fill

Users can save data from input fields as metadata to use across other documents later

☒ Send for approval

☐ Send document to email

☒ Save all data from document

☐ Send data request

☐ Sign the document

Create a project in order to be able to re-use this data in other similar documents automatically.

Project name

AXDRAFT - English Demo (27/05/2021 10:32:23)

Storage

AXDRAFT storage

Keep all your documents inside AXDRAFT cloud, or connect your own cloud system

The screenshot displays the AXDRAFT storage management interface. On the left, a 'Filters' sidebar allows users to refine results by Status, Agreement date (Before, After, On, Between), and Company name (Contains, Doesn't contain, Equals). The main area, titled 'Document storage', includes a search bar and a table of documents. A table with 6 rows shows document details like status, date, and name, each with an 'AXDRAFT' tag and a dropdown menu. An 'Upload file' button is visible on the right.

Filters

- Status**: Select...
- Agreement date**: Before, After, On, Between. Set date.
- Company name**: Contains, Doesn't contain, Equals. Input value.
- + Add filter
- Apply

Document storage

You can use **smart search** to find documents or **upload** an external document.

Search

By name | In text | By tag

Enter text you want to find

Upload file
 .pdf or .docx file

Search result 10 of 31 documents

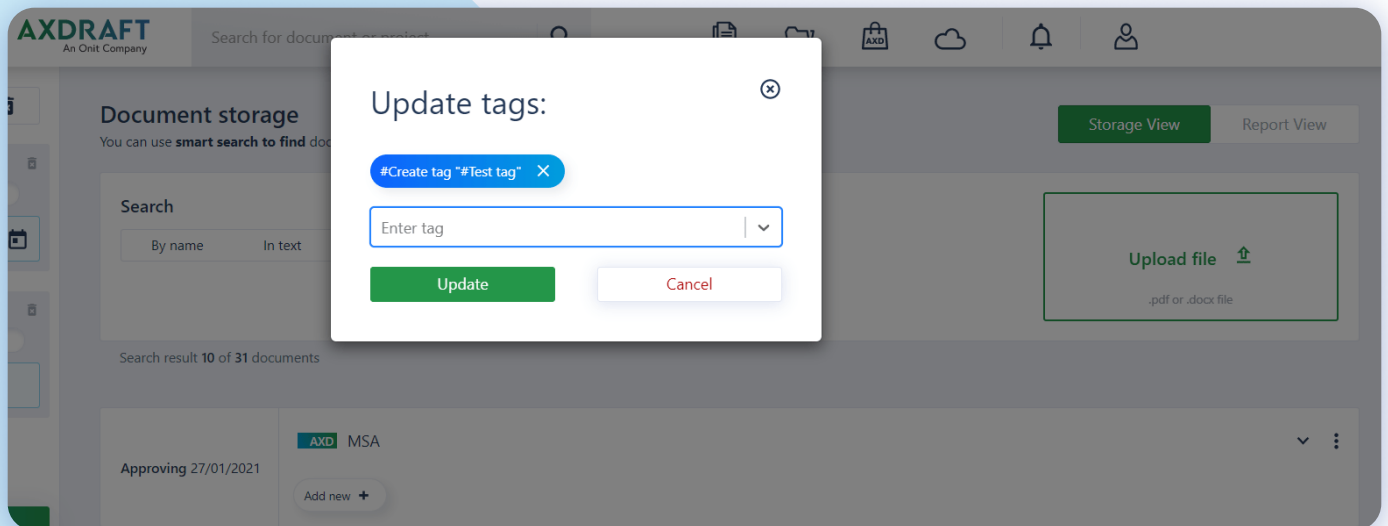
Bulk edit >

Approving 27/01/2021	AXDRAFT MSA	▼ ⋮
Approving 27/01/2021	AXDRAFT Bylaws-test-01/20/2021	▼ ⋮
Approving 27/01/2021	AXDRAFT Employee PIIA-test	Add data + ▼ ⋮
Approving 27/08/2020	AXDRAFT NDA	▼ ⋮
Approving 27/08/2020	AXDRAFT NDA	▼ ⋮
Draft 15/07/2020	AXDRAFT NDA	▼ ⋮

< Hide section

Custom tags

Build your own document categorization with custom tags that you can manually assign to any number of documents



Smart Search

Quickly find the necessary contract with search based on metadata fields, tags, document name, or document text

Document storage

You can use **smart search** to find documents or **upload** an external document.

Search

By name

In text

By tag

Upload file

.pdf or .docx file

Search result 10 of 31 documents

Approving 27/01/2021	AXD MSA	▼ ⋮
Approving 27/01/2021	AXD Bylaws-test-01/20/2021	▼ ⋮
Approving 27/01/2021	AXD Employee PIIA-test	Add data + ▼ ⋮
Approving 27/08/2020	AXD NDA	▼ ⋮

Export to PDF

All your documents can be exported to your device in PDF format

Filters

Drill down into your document database with condition-based metadata filtering. This feature will help you display contracts that meet the criteria you specify

The screenshot displays the AXDRAFT Document storage interface. On the left, a 'Filters' sidebar is highlighted with a red border. It includes sections for 'Status' (a dropdown menu), 'Agreement date' (with radio buttons for 'Before', 'After', 'On', and 'Between', and a 'Set date' field), and 'Company name' (with radio buttons for 'Contains', 'Doesn't contain', and 'Equals', and an 'Input value' field). There is an 'Add filter' button and an 'Apply' button at the bottom of the sidebar. The main area is titled 'Document storage' and includes a search bar, a 'Search' section with 'By name', 'In text', and 'By tag' options, and an 'Upload file' button. Below the search bar, it shows 'Search result 10 of 31 documents'. A table lists documents with columns for status, date, and name. The table has five rows of data. At the bottom of the sidebar, there is a 'Hide section' button.

Filters [Reset]

Status
Select...

Agreement date
Before After On Between
Set date

Company name
Contains Doesn't contain Equals
Input value
+ Add filter
Apply

Document storage
You can use smart search to find documents or upload an external document.

Search
By name In text By tag
Enter text you want to find
Search result 10 of 31 documents

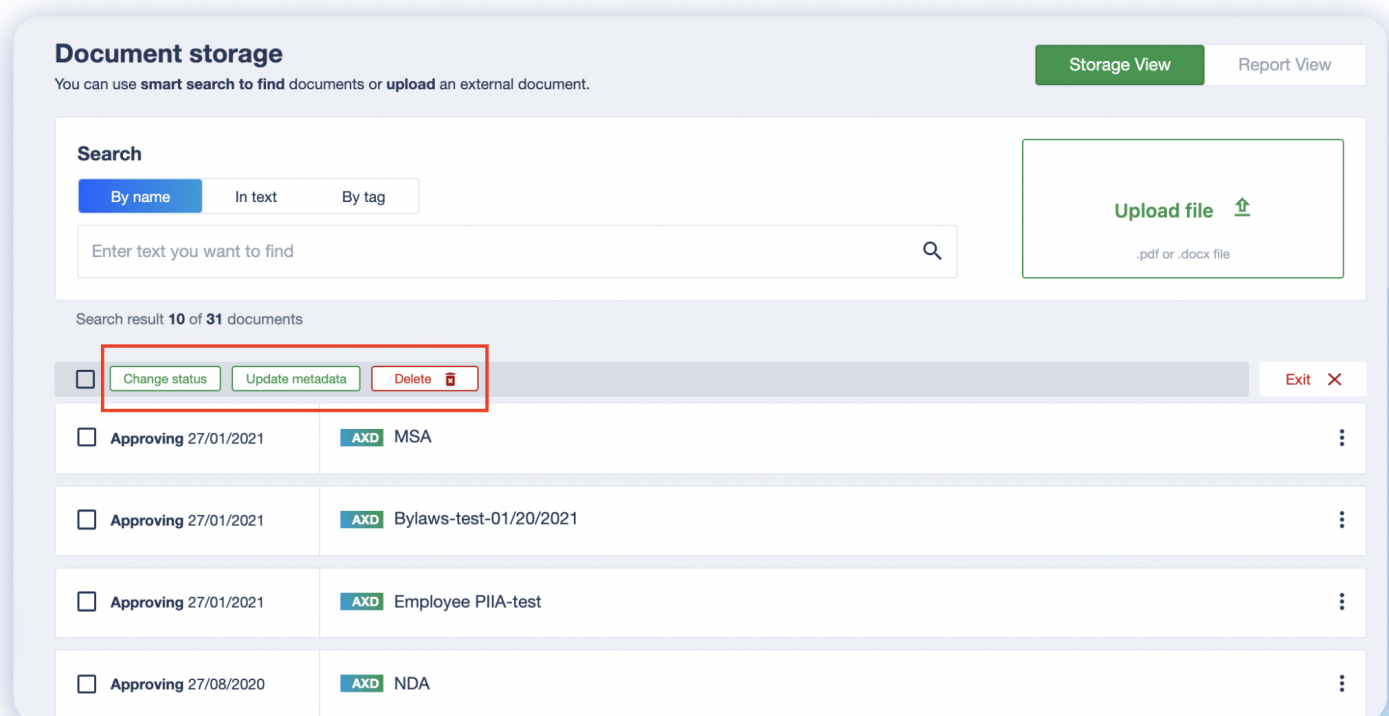
Upload file
.pdf or .docx file

Approving 27/01/2021	AXD MSA	
Approving 27/01/2021	AXD Bylaws-test-01/20/2021	
Approving 27/01/2021	AXD Employee PIIA-test	Add data +
Approving 27/08/2020	AXD NDA	
Approving 27/08/2020	AXD NDA	

< Hide section

SOC-2 protection

To avoid data breaches, AXDRAFT has received SOC-2 certification that ensures that customer data always remains intact, secured, and backed up



Status change

Manually assign the status of your documents to “Draft”, “Finished”, and “Signed.”

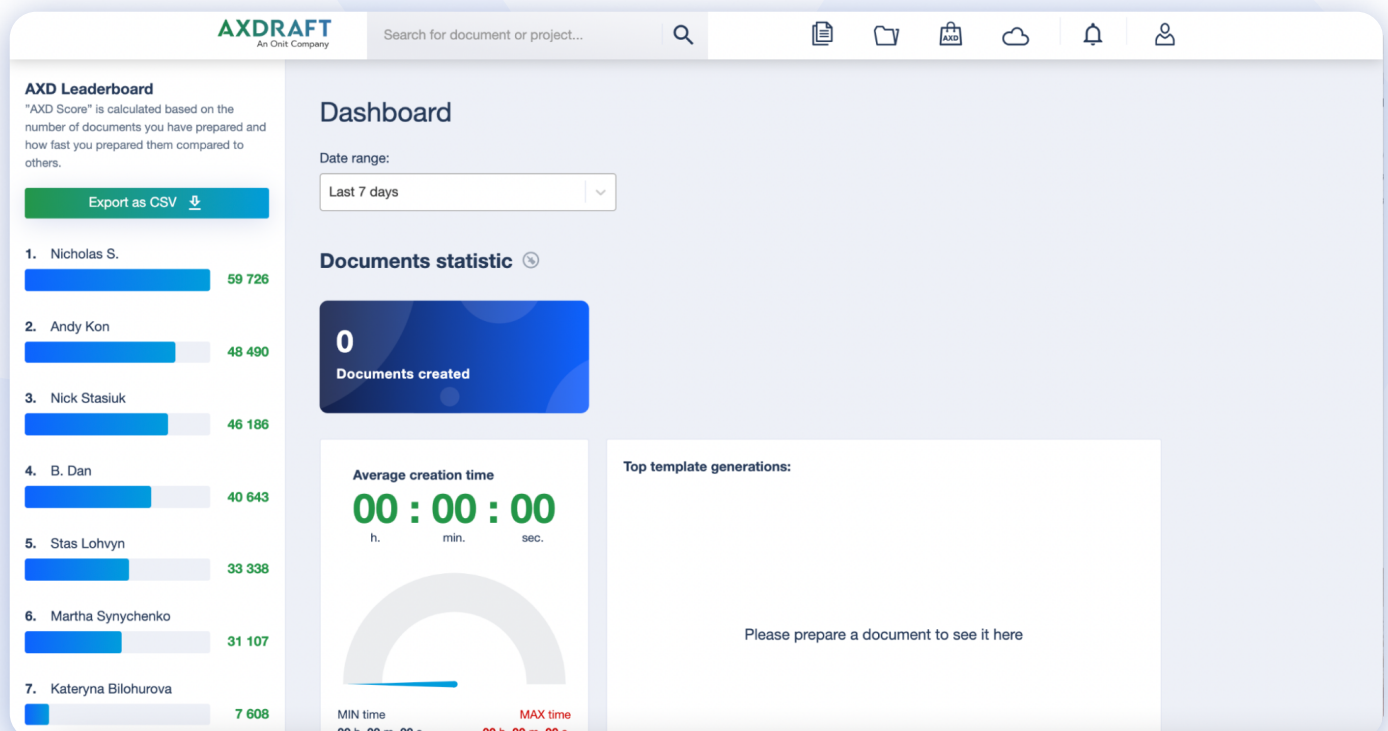
Bulk actions

Manually change the status of multiple documents at once by simply selecting the documents that need to be updated, or update the metadata in bulk

Analytics

Productivity tracking

AXDRAFT tracks and displays productivity stats for each user, including: number of documents prepared, average drafting time, and time saved with AXDRAFT.



Company-wide dashboard

Admin users can monitor the productivity of the entire team inside AXDRAFT by viewing data on each employee

Custom **reports**

Evaluate your contract performance by building reports based on your contract metadata and AXDRAFT's conditional-based logic

Reporting

Storage ViewReport View

Date range:

Last 30 days

Choose report:

Company name report

Conditions

Company name

All

✕

OR

AND

Currency

Contains

USD

✕

+

Add condition

Run report

A first-hand experience is worth a thousand words. Check out our **Instant Demo** to see our document drafting in action and get a perfect and ready-to-use NDA in **57 seconds!**

Or **book a live demo** and we'll show you all the ins and outs of AXDRAFT.

Send us a message:
sales@axdraft.com

Call us:
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