

The 123s of SetBuilder

Digital document binders — plan, compile, and deliver in minutes.

- ⓘ **Before you begin:** SetBuilder must be enabled at the repository level. If you're unsure whether it's been set up, reach out to your L2 contact before getting started.



WHAT IS SETBUILDER?

SetBuilder is a NetDocuments add-on that lets you digitally organize documents into sets or binders — eliminating the need for physical closing rooms, manual labeling, and printed materials. It lives directly within your NetDocuments workspace, so you can plan, assemble, and distribute polished document packages without ever leaving your DMS.

HOW IT WORKS

1

Plan Your Set

- › Open the Sets tab and click *Add New Set*
- › Drag and drop files (Word, Excel, PDF) or link existing NetDocuments items
- › Build an outline with headers and placeholders for pending documents
- › Clone a previous set from the Set Library to use as a starting template

2

Organize & Customize

- › Rearrange documents, rename entries, and add numbering in your preferred format
- › Link documents instead of copying to avoid duplicates and stay in sync
- › Use placeholders to track what's missing and hand off with a clear checklist
- › Preview documents directly within the set without downloading or opening them

3

Generate & Deliver

- › Click *Generate Binder* to compile into a hyperlinked PDF or ZIP
- › Share via secure NetDocuments link or download for digital delivery
- › Add an optional cover page and table of contents for a polished result
- › Use bulk download to export an entire section as a ZIP for partial delivery

KEY BENEFITS



Save Time & Money

Reduce hours of manual work to minutes. Organizations report savings of **nearly \$1,500 per transaction.**



Standardize Processes

Clone completed sets as templates so every transaction follows the same structure and nothing gets missed.



Collaborate Securely

Work entirely within NetDocuments — no printing, no physical closing rooms, no risk of information breach.



Deliver Professionally

Generate polished, bookmarked PDFs or organized ZIP files for fast digital delivery to clients.