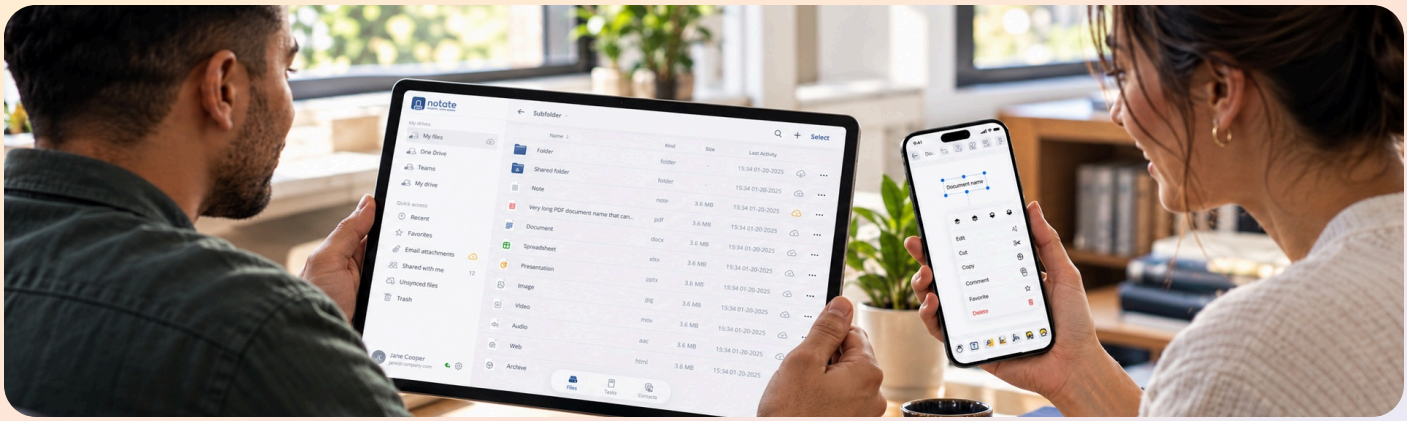
notate PDF | OVERVIEW

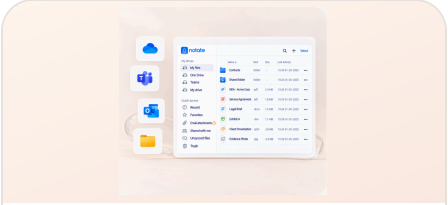
THE SECURE DOCUMENT APP FOR REGULATED ENTERPRISES

Work on any company document, from any device — Securely.

Notate is one app where people find, review, mark up, sign and send back company documents on iPhone, iPad, Android, Windows and Mac. Files stay in the systems you already run. Nothing is migrated, and Shafer Systems never receives your content.



Trusted by more than 100 enterprises across finance, government and legal since 2012.



01

Access any document, any time

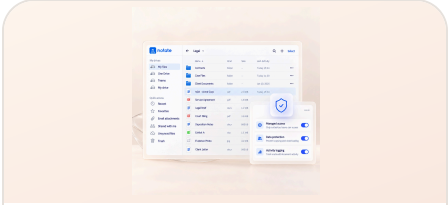
SharePoint, OneDrive, Teams, ShareFile, network drives and email attachments, all in one app. Keep working offline; changes sync when you reconnect.



02

Desktop-quality PDF markup, while mobile

Edit, annotate, sign, fill forms, redact and manage pages on a phone or tablet, with full Apple Pencil support. Send back only the pages you changed.



03

Built from the ground up for security

Deployed through your MDM, under the app policies you already run. No vendor cloud: documents, notes and AI conversations stay in your environment.

WORKS WITH THE SYSTEMS YOU ALREADY RUN

Microsoft 365 · Exchange, online and on-premises · SharePoint · OneDrive · Teams · ShareFile · Network drives · Microsoft Intune · BlackBerry UEM · Citrix · Ivanti · Any AppConfig MDM

HOW NOTATE WORKS

Everything people do with a document, in one app.

In place of a storage browser, a PDF editor and a notes tool, working alongside your Microsoft Office apps.

01

Access any document, any time

- **Every source in one place.** Browse and save to SharePoint, OneDrive, Teams, ShareFile, corporate file shares and email attachments.
- **No migration.** Files stay where they are today. Notate works on them in place.
- **Office files too.** Open Word, Excel and PowerPoint in your Microsoft Office apps and save straight back.
- **Offline when you need it.** Mark items for offline use while traveling or on site; changes sync back when you are online.
- **Every device your people use.** iPhone, iPad and Android through your MDM; Notate Desktop on Windows and Mac with nothing to install.

02

Desktop-quality PDF markup, while mobile

- **A complete PDF editor.** Highlight, draw freehand, comment, edit text and manage pages.
- **Sign and fill forms**, and redact securely before a document goes out.
- **Compare versions** side by side before you approve a change.
- **Reply from Notate.** Send the marked-up document, or only the pages you changed.
- **Notes and handwriting.** Secure digital paper for handwritten and typed notes and voice recordings.
- **AI assistant, optional and controlled by app policy.** Summarize a document and ask questions about it, using your own Azure AI service.

03

Built from the ground up for security

- **Inside the controls IT already runs.** Deploy through Microsoft Intune, BlackBerry UEM, Citrix, Ivanti or any AppConfig-compatible MDM.
- **No vendor cloud.** Documents, notes and AI conversations stay in your environment. Shafer Systems never receives your content.
- **Mail stays on your Exchange**, on-premises or online. Notate opens attachments in place.
- **AI is off until IT turns it on.** It runs on your own Azure AI service, under your work sign-in, and conversations are not stored.
- **Documentation for your security team** at support.notatepdf.com, and answers from the engineers who built Notate.

AN ORDINARY AFTERNOON

An attorney is between meetings when a contract arrives by email. She opens the attachment in Notate on her iPad, marks up the clauses that need changes, signs the page that needs her signature, and replies with only the pages she changed. The file never leaves the firm's Exchange, and she never opens a laptop.

NEXT STEPS

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Start a free trial
Test with your own documents and MDM.
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Videos, security and admin guides.
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Talk to our team
A demo or Q&A with our engineers.
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