



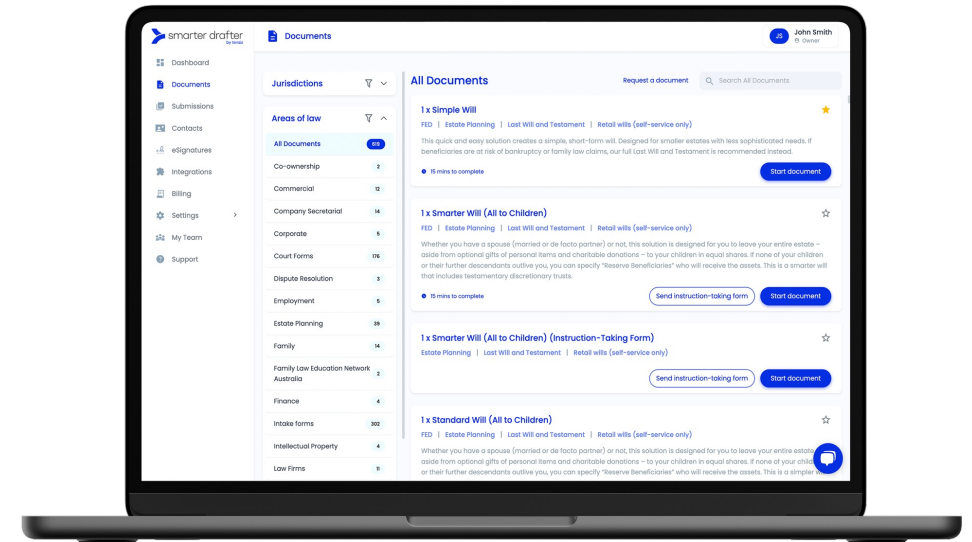
# Smarter Drafter + Clio

Integration Overview

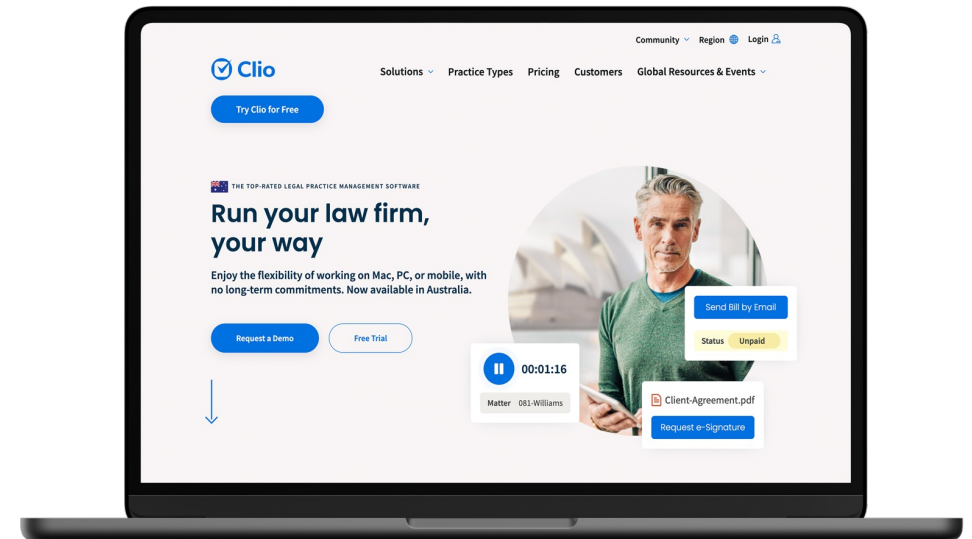
MAR24



Smarter Drafter is automating Australian law firms – from Instruction to Intake. With Smarter Drafter you can produce beautifully formatted client-facing, court room ready documents that are as easy to read as they are compliant.

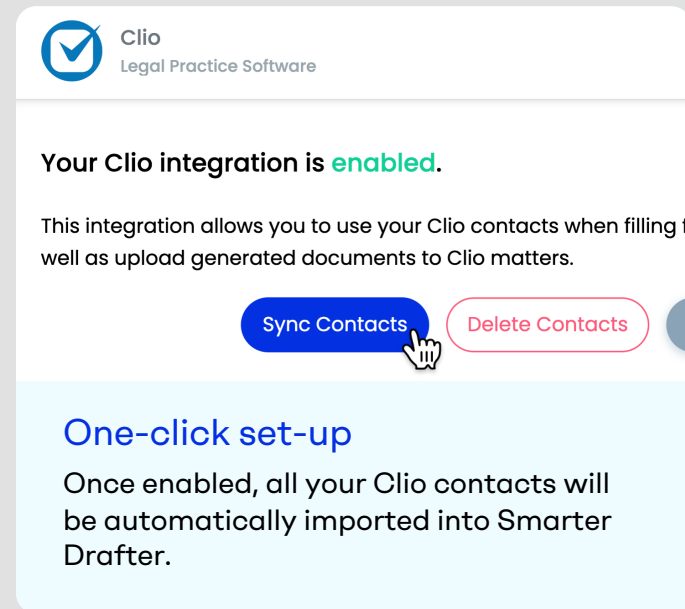


Clio is the cloud-based legal case management software that makes running your firm, organising cases, and collaborating with clients from one place possible.



# Contact Syncing

Smarter Drafter and your Clio contacts are automatically synchronised each time you use a Smart Q&A Form, saving you time and reducing errors.



Clio  
Legal Practice Software

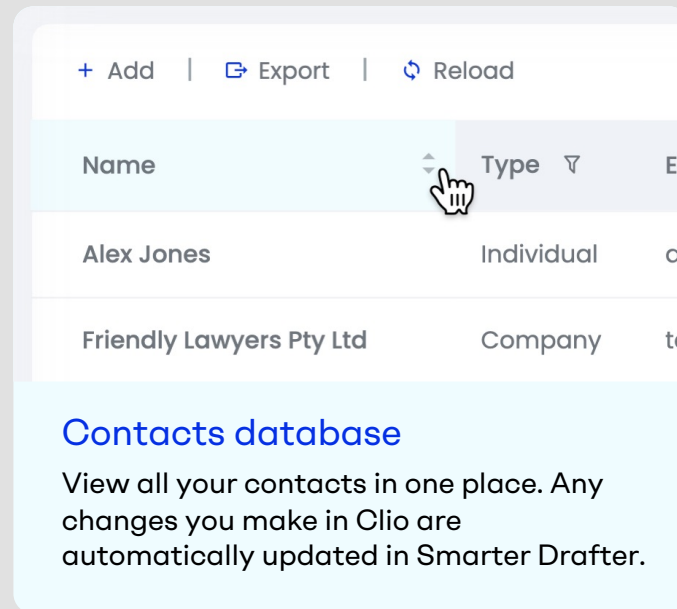
Your Clio integration is **enabled**.

This integration allows you to use your Clio contacts when filling forms, as well as upload generated documents to Clio matters.

[Sync Contacts](#) [Delete Contacts](#)

### One-click set-up

Once enabled, all your Clio contacts will be automatically imported into Smarter Drafter.

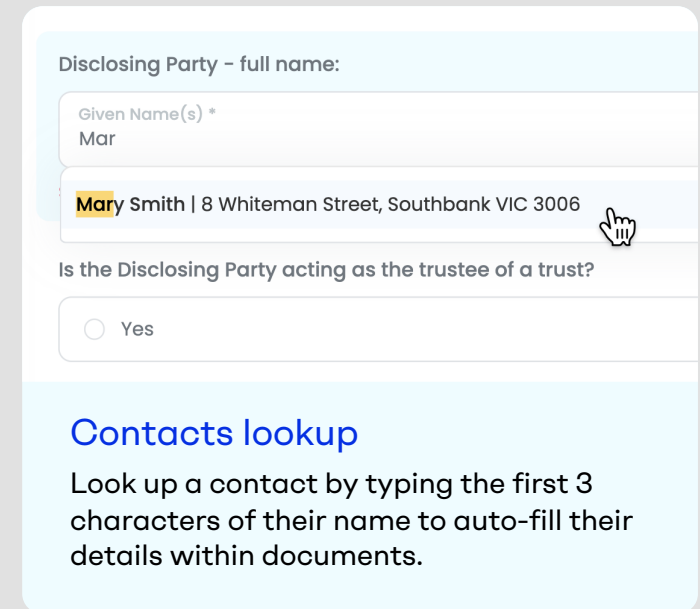


+ Add | Export | Reload

Name	Type	En
Alex Jones	Individual	al
Friendly Lawyers Pty Ltd	Company	te

### Contacts database

View all your contacts in one place. Any changes you make in Clio are automatically updated in Smarter Drafter.



Disclosing Party - full name:

Given Name(s) \*  
Mar

Mary Smith | 8 Whiteman Street, Southbank VIC 3006

Is the Disclosing Party acting as the trustee of a trust?

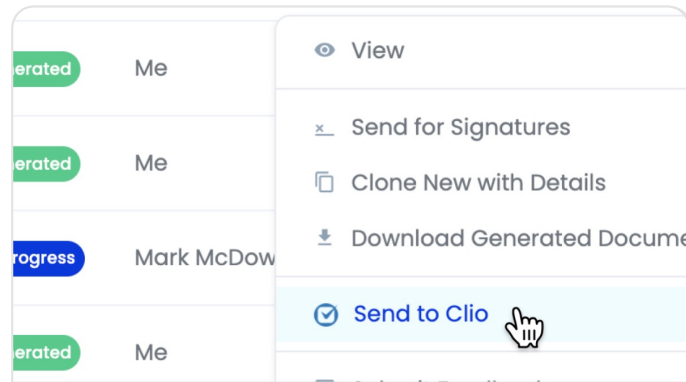
Yes

### Contacts lookup

Look up a contact by typing the first 3 characters of their name to auto-fill their details within documents.

# Send Documents to Clio

Smarter Drafter and Clio integrate seamlessly so that your documents are all kept in one place, saving you time and keeping things simple.

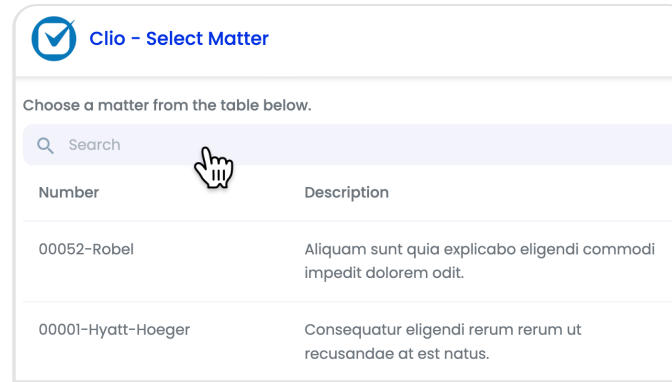


erated Me  
erated Me  
Progress Mark McDow  
erated Me

View

- Send for Signatures
- Clone New with Details
- Download Generated Document
- Send to Clio**

**One-click send**  
Documents generated in Smarter Drafter can be saved directly to a matter folder in Clio.



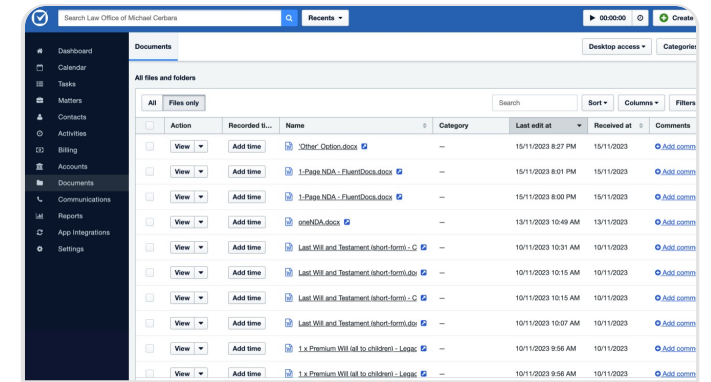
**Clio - Select Matter**

Choose a matter from the table below.

Search

Number	Description
00052-Robel	Aliquam sunt quia explicabo eligendi commodi impedit dolorem odit.
00001-Hyatt-Hoeger	Consequatur eligendi rerum rerum ut recusandae at est natus.

**Choose your matter**  
Choose your matter by either typing the first 3 characters of its name or by choosing it from the list.



Search Law Office of Michael Centers

Documents

All files and folders

Action	Recorded ti...	Name	Category	Last edit at	Received at	Comments
View	Add time	Other_Option.docx		15/11/2023 8:27 PM	15/11/2023	Add comm
View	Add time	1-Page NDA - FluentDocs.docx		15/11/2023 8:01 PM	15/11/2023	Add comm
View	Add time	1-Page NDA - FluentDocs.docx		15/11/2023 8:00 PM	15/11/2023	Add comm
View	Add time	enbNDA.docx		13/11/2023 10:49 AM	13/11/2023	Add comm
View	Add time	Last Will and Testament (short-form) - C		10/11/2023 10:31 AM	10/11/2023	Add comm
View	Add time	Last Will and Testament (short-form) - C		10/11/2023 10:15 AM	10/11/2023	Add comm
View	Add time	Last Will and Testament (short-form) - C		10/11/2023 10:15 AM	10/11/2023	Add comm
View	Add time	Last Will and Testament (short-form) - C		10/11/2023 10:07 AM	10/11/2023	Add comm
View	Add time	1 x Premium Will (short-form) - Legal		10/11/2023 9:56 AM	10/11/2023	Add comm
View	Add time	1 x Premium Will (short-form) - Legal		10/11/2023 9:56 AM	10/11/2023	Add comm

**Everything in one place**  
Keep all your documents in one place to avoid double-handling and maintain the integrity of your documents.



## Try Smarter Drafter and Clio together today!

You will get access to:

- All precedents
- Instruction-Taking forms
- eSignatures
- Integrations

Smarter Drafter is a Tensis solution.

For more information:



[sales@smarterdrafter.com.au](mailto:sales@smarterdrafter.com.au)



**BOOK A DEMO**

Scan and book a time that suits you.



[smarterdrafter.com.au](https://smarterdrafter.com.au)