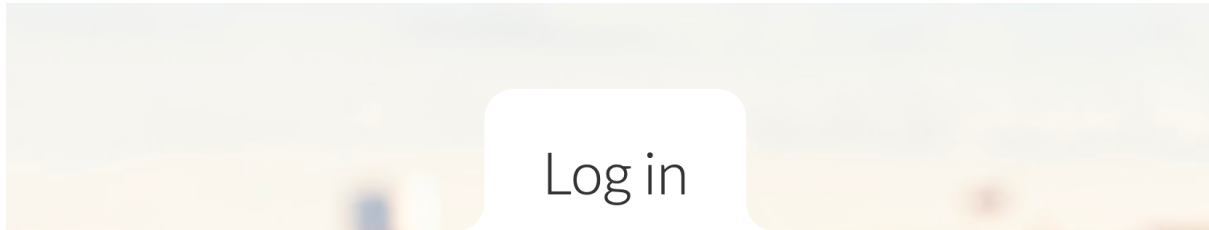


Settify / Clio Integration

Part I: Initial Setup

1. Log into Settify using your Settify login details.



Email address

Password

Keep me logged in on this device

Login

[Forgot your password?](#)

[Cancel login and return to the home page](#)

2. Click on "Configure Settify".

[Configure Settify](#) [Invitations](#)

Client name [A-Z](#) [Z-A](#) [Refresh](#)

Training Client [Edit](#)

Date **Able to act?** **Status**

25/1/21



3. Click on “Integrations”.

Configure Settify

 Home



Your team



Office details



Integrations



Billing and accounts



Customise the client experience



Customise the admin experience



Invitations



Settify links and buttons



COVID-19 Messaging

4. Select “Clio”, then click “Connect”.



🔗 The integration between Settify and Clio is not yet connected. To connect the integration, click the button below.



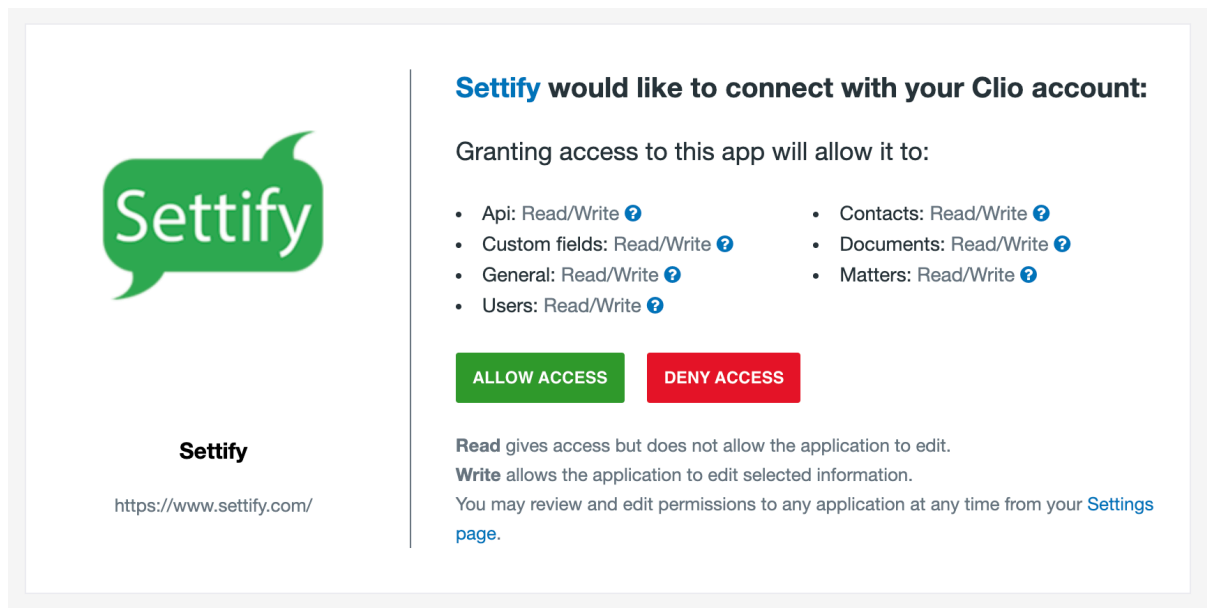
5. Log in to your account using your Clio email and password.



Don't have an account? [Sign up](#)

A screenshot of the Clio Manage sign-in interface. It features a white rectangular form box on a light gray background. The form has the title "Sign in to Clio Manage" at the top. Below the title is the label "Email" followed by a text input field. At the bottom right of the form is a blue button with the text "Next: Password".

6. Click “Allow Access” to grant Settify access to your Clio account.



The screenshot shows a connection screen for the Settify app. On the left, there is a green speech bubble logo with the word "Settify" in white. Below the logo, the name "Settify" is written in bold, followed by the URL "https://www.settify.com/". On the right, the heading "Settify would like to connect with your Clio account:" is displayed. Below this, it says "Granting access to this app will allow it to:". A list of permissions is shown in two columns: "Api: Read/Write", "Custom fields: Read/Write", "General: Read/Write", "Users: Read/Write" in the first column; and "Contacts: Read/Write", "Documents: Read/Write", "Matters: Read/Write" in the second column. Each permission has a small question mark icon. Below the list are two buttons: a green "ALLOW ACCESS" button and a red "DENY ACCESS" button. At the bottom, there is explanatory text: "Read gives access but does not allow the application to edit." and "Write allows the application to edit selected information." followed by a note: "You may review and edit permissions to any application at any time from your Settings page."

7. The page will then redirect you back to Settify, and you will see a message indicating that the integration has been successful.

You can specify defaults for the options available when creating a new matter in Clio on this screen. Feel free to leave these blank for the time being.



The integration between Settify and Clio has been successfully connected.

[Click here to disconnect the integration](#)

Clio Settings

Clio Grow Settings ▼

Default settings for each client (these can be changed on a client-by-client basis when using the integration).

Matter type * ▼

Credit ▼

Person responsible * ▼

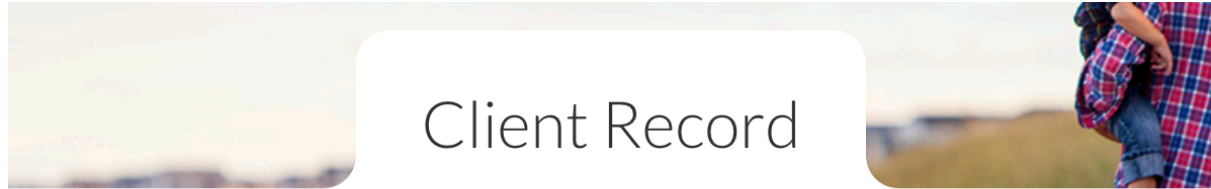
Automatically capitalise names and addresses

Revert changes

Save changes

Part II: Creating matters in Clio

1. Open a client file from the Settify admin home screen.



[Home](#)

[Settify Documents](#) [Notify me of changes](#) [Compare changes](#)

[View Chronology](#) [Send Follow-up Email](#)

[Prevent further changes](#)

PRIVILEGED AND CONFIDENTIAL

Prepared by for Matt's Test Firm

Client Record: SMITH, Practice

Appointment requested: Thursday 30 September 2021

Last modified: Wednesday 20 October 2021


Executive Summary



Parties

	Mr Practice Smith (client)	Mrs Sally Smith (client's spouse)
Age	45 (born 30/09/1976)	39 (born 04/04/1982)
Place of birth	–	–
Gross income	Consultant – \$250,000 Other income – \$35,000 Total – \$285,000	Accountant – \$85,000
Health concerns	No health concerns	No health concerns
Marital status	Married	
Current situation	We've separated, and I'm not sure what's next	
Amicability	We're mostly amicable, but it's shaky	
Repartnered?	No	I don't think so

2. Click on the “Clio” button at the top right. You will be prompted to choose a matter type and the key staff on the file.

[Home](#) [Settify Documents](#) [Notify me of changes](#) [Compare changes](#)
[View Chronology](#) [Send Follow-up Email](#) 

Complete the details below to create a new matter in Clio using the information in this Settify record.

Matter type ✓ ▼


Credit ▼

Person responsible * ▼

Automatically capitalise names and addresses

[Create Clio matter](#)

3. Fill in the required fields and click “Create Clio matter”.

[Home](#) [Settify Documents](#) [Notify me of changes](#) [Compare changes](#)
[View Chronology](#) [Send Follow-up Email](#) 

Complete the details below to create a new matter in Clio using the information in this Settify record.

Matter type ✓
Family ▼

Credit ▼

Person responsible ✓
Edward Kirk ▼

Automatically capitalise names and addresses

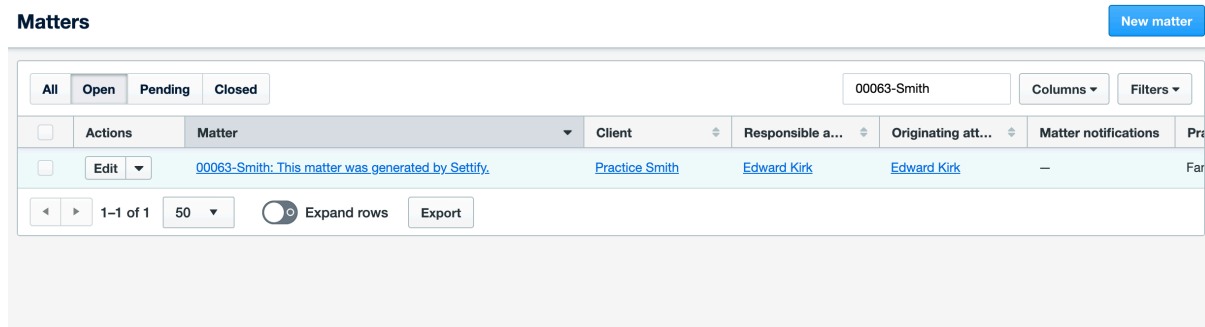
[Create Clio matter](#)

4. The page will update, indicating the matter has been created successfully.

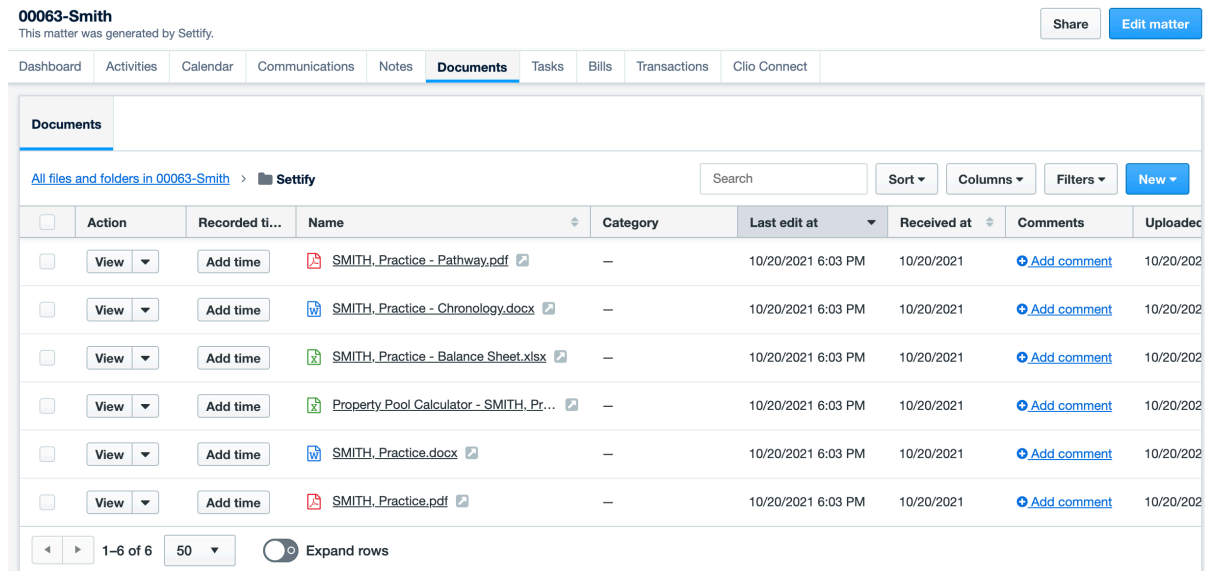
Note: the matter number will automatically generate according to your existing Clio settings.

5. The new matter will appear in your Clio matter list, pre-populated with information about the key parties.

The new matter appears on the matter list.



When you open the matter, notice that parties have been automatically populated and the Settify documents added to the matter.



When you open a contact, notice that key details have been copied automatically. This information can be amended within Clio if any errors are discovered.

▼ Contact information

Company / Title	— / Mr
Phone	0413 740 064 (Home)
Email	contact@settify.com.au (Home)
Website	—
Address	Home 99 Lonesome Road Melbourne, VIC 3000

► Custom Fields

▼ Billing information

LEDES client ID	—
Payment profile	Default (30 days)
Rates	—

▼ Client's matters All Open [New matter](#)

[00063-Smith](#): This matter was generated by Settify. Open [Edit](#)

◀ ▶ 1-1 of 1 [View all matters](#)

▼ Associated matters

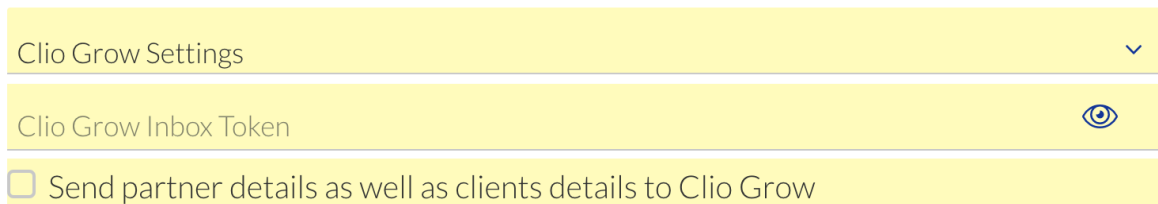
This contact isn't associated with any matters.

[Link matter](#)

Part III: Clio Grow Setup

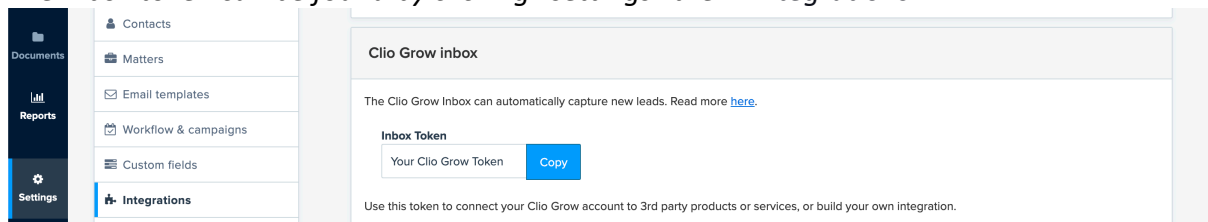
1. Follow steps 1 through 3 from “Part I: Initial Setup”.
2. Click on “Clio Grow Settings”.

Clio Settings



3. Log in to Clio Grow, then copy your “Clio Grow Inbox Token”.

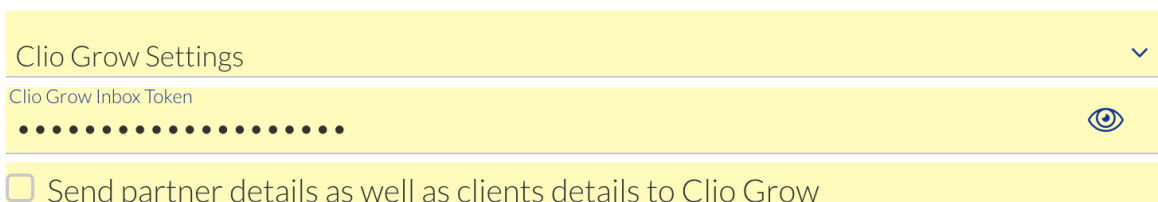
The inbox token can be found by clicking “settings” then “Integrations.”



4. Paste the “Token” into Settify and click “Save Changes”.

If you would like Settify to send the other party’s information, click the checkbox before clicking “Save Changes”.

Clio Settings



5. When a client completes the Settify Induction, their information will be sent through to your inbox in Clio Grow.

Sally Smith Ignore Add ▾

✉ contact@settify.com.au 📞 0425 719 030

Address: 23 Leafy Street
Suburbsville VIC 3009
🗨 Date of birth: 04/04/1982
Other party to Practice Smith (lead from Settify)

Source: <https://testmattwaters.settify.com.au> Created on: Wednesday, October 13, 2021 at 12:26 pm (EDT)

Practice Smith Ignore Add ▾

✉ contact@settify.com 📞 0413 740 064

Address: 99 Lonesome Road
Melbourne VIC 3000
🗨 Date of birth: 30/09/1976
Settify lead URL: <https://testfirm.settify.com.au/admin/clients/104a9920-5331-4ab9-b5ae-df7353357933>

Source: <https://testmattwaters.settify.com.au> Created on: Wednesday, October 13, 2021 at 12:26 pm (EDT)