smarter drafter PRO
by tensis

Send a Document to NetDocuments

Help Guide

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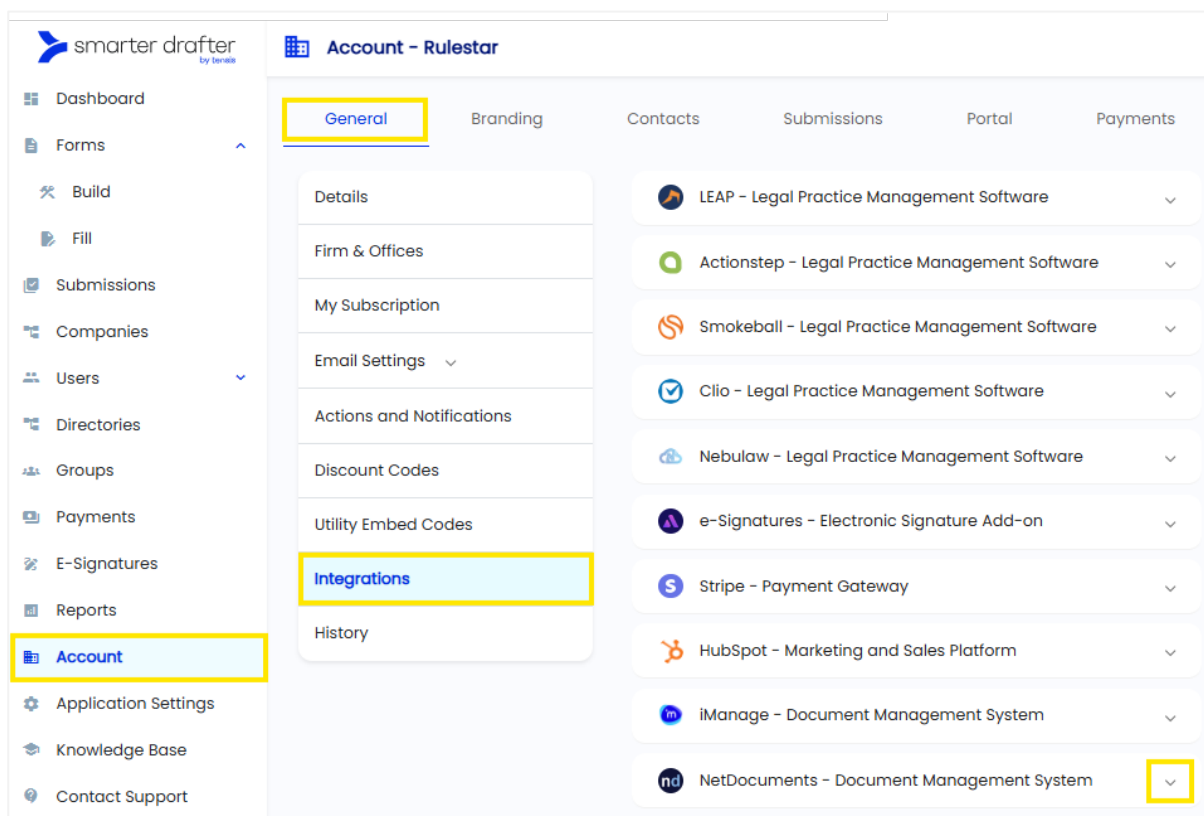
1. Sending Documents to NetDocuments
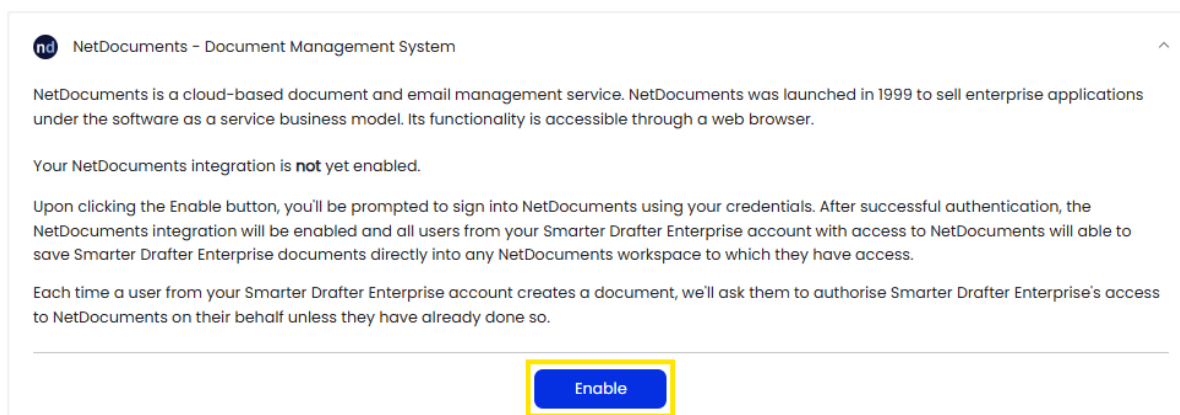
1.1 Enable NetDocuments

Smarter Drafter integrates with NetDocuments. To use the integration to save documents, start by enabling NetDocuments from the integrations list (you may need assistance from an Admin):

1. Click **Account** in the **navigation menu**.

2. Under the **General** tab, click **Integrations**.

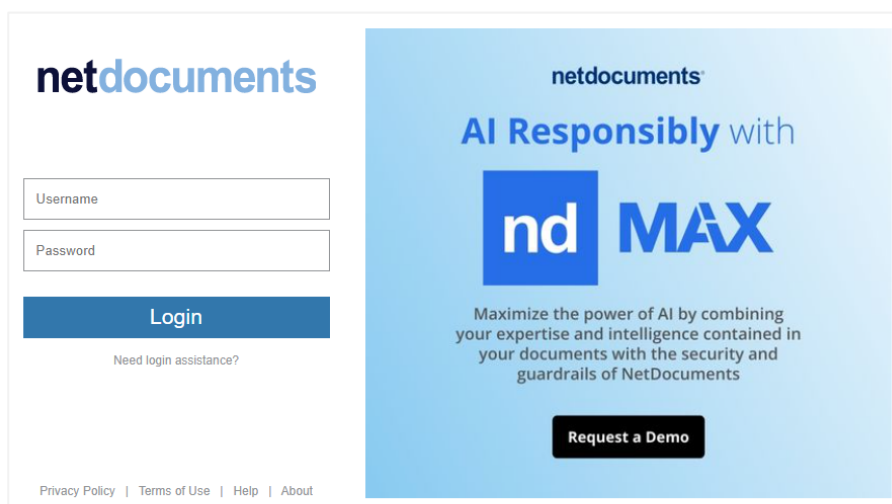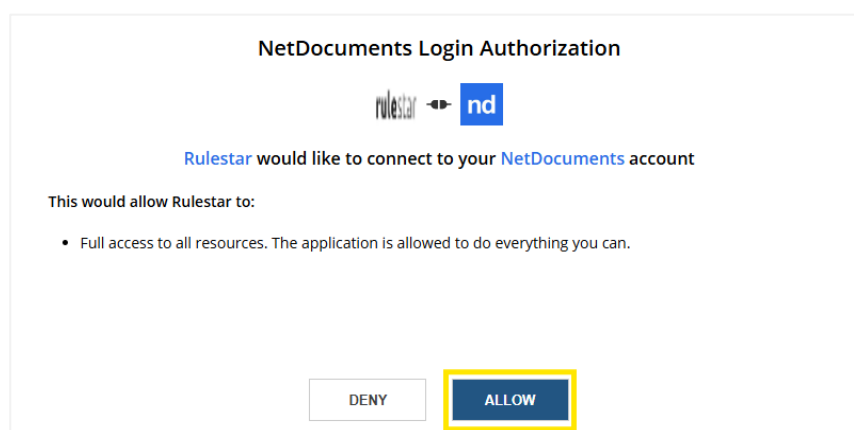3. Click the **drop down arrow** on the **NetDocuments** tile.

4. The integration tile appears. Click the **Enable** button to enable NetDocuments.
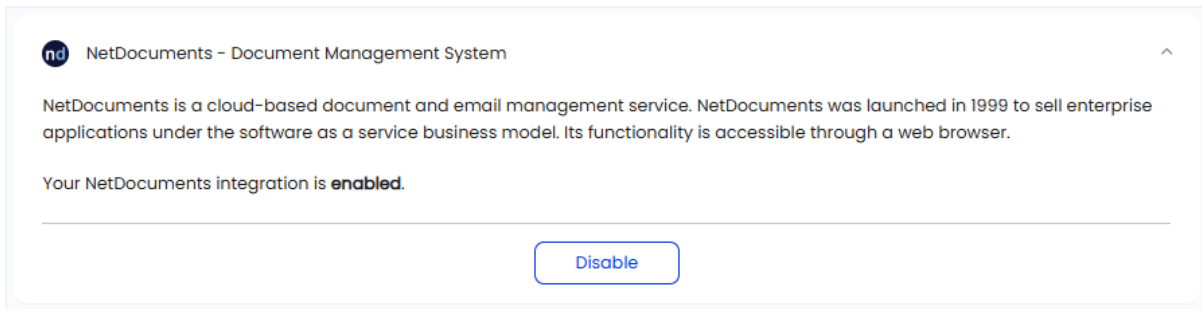

5. Use your credentials to log in to NetDocuments in the **pop up window**.

6. When you have logged in, the system will connect to NetDocuments. Click Allow to proceed.

7. NetDocuments integration is now enabled.

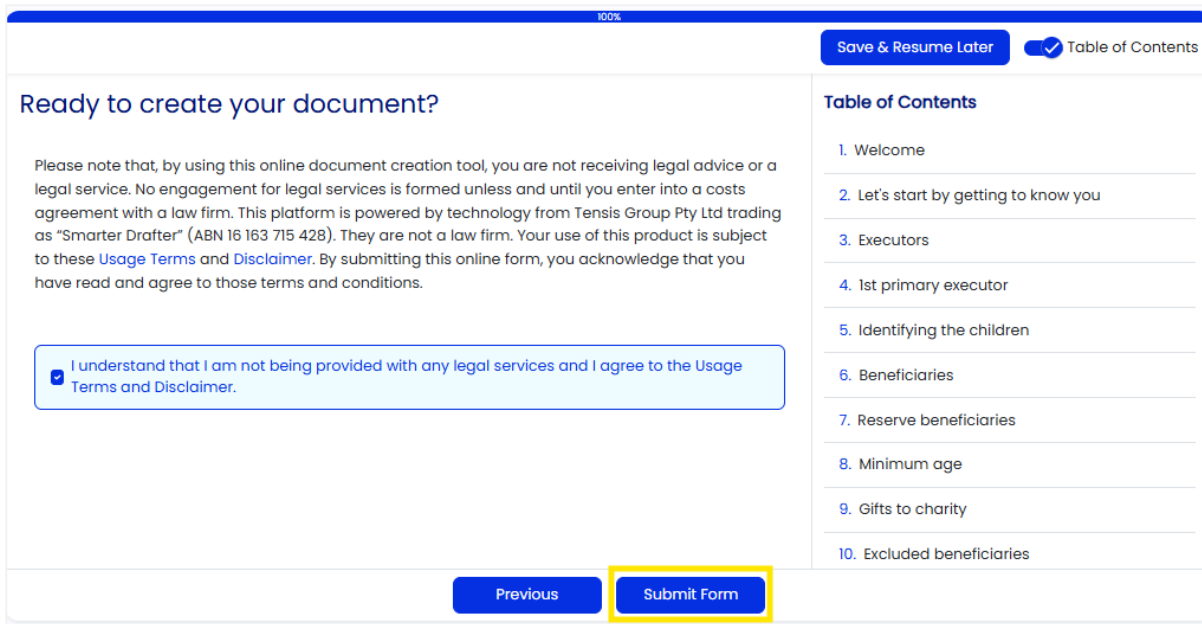**nd** NetDocuments - Document Management System ⌃

NetDocuments is a cloud-based document and email management service. NetDocuments was launched in 1999 to sell enterprise applications under the software as a service business model. Its functionality is accessible through a web browser.

Your NetDocuments integration is **enabled**.

Disable

1.2   Complete the Required Form

8. When a form is completed, send the form to NetDocuments. Click **Submit Form.**

100%

Save & Resume Later   ☑ Table of Contents

Ready to create your document?

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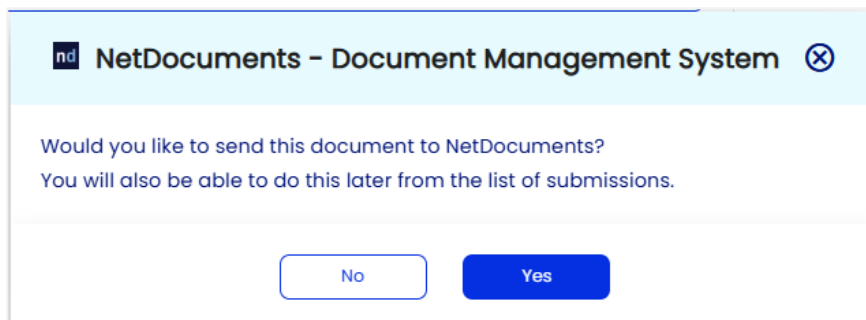☑ I understand that I am not being provided with any legal services and I agree to the Usage Terms and Disclaimer.

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1. Welcome

2. Let's start by getting to know you

3. Executors

4. 1st primary executor

5. Identifying the children

6. Beneficiaries

7. Reserve beneficiaries

8. Minimum age

9. Gifts to charity

10. Excluded beneficiaries

Previous   Submit Form

9. The following pop up will appear. Click **Yes** to send the document to NetDocuments.

nd NetDocuments - Document Management System ⊗

Would you like to send this document to NetDocuments?
You will also be able to do this later from the list of submissions.

No   Yes

1.3   Send a Submitted Document to NetDocuments

If a form has already been submitted, and you would also like to send it to iManage or NetDocuments or another integrated system, click the **ellipsis** (three vertical dots) to the right of the form in the submission list and select **Send to NetDocuments** (or the preferred system).

1. Click on the **name** of the document to send it.

2. A **green pop-up** will confirm that the document was sent successfully.